

出國報告（出國類別：其他）

參加「2006年國際漁業團體聯盟（ICFA）會議」報告

服務機關：行政院農業委員會漁業署

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派赴國家：義大利 羅馬

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參加「2006年國際漁業團體聯盟（ICFA）會議」報告

摘 要

- 一、 國際漁業團體聯盟（International Coalition of Fisheries Association；簡稱 ICFA）成立於 1988 年，目前會員計有東南亞國協聯盟、澳洲、台灣、…等 14 個國家級漁業團體組，為聯合國（UN）及聯合國糧農組織（FAO）非政府組織觀察員。2006 年 ICFA 年會於 11 月 12-15 日在義大利羅馬之 Monastery of Saint Anselmo 召開，我方派漁業署吳信長簡任技正及中華民國對外漁業合作發展協會張正昇組長與會。
- 二、 本次會議各會員關切議題包括：生態標籤等 6 項議題，經各國交換意見後，通過公海底拖網、捕鯨、IUU、對永續性之承諾（Commitment to Sustainability）及海洋保護區等 5 項決議。至於「區域性鮪類組織聯合會議」決議草案，我國、日本、紐西蘭及西班牙有不同之意見，未達成共識而無法成為 2006 年 ICFA 之決議。
- 三、 ICFA 決定將派員參加 2007 年之國際會議包括：區域性鮪類組織聯合會議、FAO COFI 會議、OECD 漁業委員會之 Workshop on Globalization、CITES 第 14 屆會議及聯合國 Open-ended Informal Consultative Process on the Oceans and the Law of the Sea 等 5 項會議，另視情況需要派員參加 COFI 貿易次委員會所召開之有關 Traceability、VMS 及 Consultative Industry Forum 等 3 項專家或技術諮商會議。
- 四、 會中選出下屆主席為西班牙漁業聯合會秘書長 Mr.Javier Garat Perez；年費自 2007 年起調升至 3,000 美元；另 ICFA 秘書長由 NFI 國際組組長 Mr. Stetson Tinkham 兼任。
- 五、 與會人員於 14 日赴 FAO 與漁業處處長野村一郎（Ichiro Nomura）等官員就生態為基礎之管理（Ecosystem based management）等 10 項議題交換意見。其中野村處長特別表示，很多保育議題，雖皆非由 FAO 主動提出，係為確保漁業利益，以免環保團體一味主導作成偏頗之決定。
- 六、 FAO 野村處長對 ICFA 及我國至為友善，由於我國國際政治地位特殊，我國參加 FAO 相關會議，或透過 ICFA 參加 FAO 會議，均賴野村處長及 ICFA 之協助，應持續與渠保持良好關係。另，我方業者亦應踴躍參加 ICFA 之會議與活動，除有助於建立與相關國家民間團體聯繫之管道外，亦可擴增國際觀，瞭解最新國際漁業議題發展。
- 七、 基於養殖水產品貿易日趨增加，為加強疫病管控及降低貿易障礙等，有必要成立國際性之養殖漁業團體聯盟（以平衡環保團體對養殖漁業之負面看法）。

參加「2006年國際漁業團體聯盟（ICFA）會議」報告

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參加「2006年國際漁業團體聯盟會議」報告

壹、前言

國際漁業團體聯盟（International Coalition of Fisheries Association；簡稱 ICFA）成立於 1988 年，係由世界主要國家層級漁業團體組成的非政府組織(NGO)，並已取得聯合國(UN)及聯合國糧農組織（FAO）非政府組織觀察員之地位，我國長利用代表該組織參加較具政治性且我國無法以政府名義派員參加之國際組織（如聯合國及其量農組織等）舉辦之國際會議。因此，與該聯盟長年均保持密切關係，其活動也均積極參與。目前參與之團體計有東南亞國協聯盟、澳洲、台灣、西班牙、加拿大、冰島、日本、韓國、美國、紐西蘭、挪威、智利、俄羅斯及歐盟等 14 個漁業團體，我國係以台灣水產協會代表參加該組織。

2006 年 ICFA 年會於 11 月 12-15 日在義大利羅馬之 Monastery of Saint Anselmo 召開，身為會員之一份子，我方派漁業署遠洋漁業組吳信長簡任技正及中華民國對外漁業合作發展協會張正昇組長代表台灣水產協會代表與會。

貳、會議過程紀要

與會之會員除台灣水產協會外，尚有西班牙漁業聯合會（Federacion Espafiola de Organizaciones Perqueras）、加拿大漁業協會（Fisheries Council of Canada）、冰島漁業協會（Fisheries Association of Iceland）、大日本水產會（含拖網協會）、美國國家漁業協會（National Fisheries Institute）、紐西蘭水產品協會（New Zealand Seafood Industry Council）、韓國漁業協會（Korea Fisheries Association）、智利漁業協會（Sociedad Nacional de Pesca）、歐盟捕撈漁業組織總會（Association of the National Organizations of Fishing Enterprises in the E.U.；簡稱 Europeche）、挪威漁業協會（Norway Fishermen's Association），另全球養殖聯盟（Global Aquaculture Alliance）及全球圍網漁業組織（World Tuna Purse Seine Organization）之代表亦以觀察員身份與會等。謹簡介說明會議召開情形如下：

- 一、會議開始由各國代表介紹其團員後陸續提出國家報告，有關各國書面報告包括：加拿大、冰島、日本、韓國、紐西蘭、我國、美國詳如附件 1~7。

- 二、 會議主席加拿大漁業協會 Mr. Patrick McGuinness 歸納各會員關切議題包括：生態標籤、IUU、捕鯨、生態為基礎的管理（Ecosystem based management）、公海底拖網及區域性鮪漁業組織聯合會議等 6 項議題，經各國交換意見後，通過公海底拖網、捕鯨、IUU、對永續性之承諾（Commitment to Sustainability）及海洋保護區等 5 項決議（詳如附件 8~12）。我方及紐西蘭對日本由大日本水產會幫日本 OPRT 所提「區域性鮪類組織聯合會議」決議草案中「to reduce tuna fishing capacity on global basis」之用詞有意見，惟與會之西班牙圍網船代表力挺日本提案，經溝通後我方與日本及西班牙代表達成共識，將 reduce 改為 manage，其他用詞維持不變，但紐西蘭認為該國係以捕撈配額而非捕撈能力來管理，最後該決議即因未達成共識而無法成為 2006 年 ICFA 之決議。
- 三、 除通過上述各項決議外，亦決定 ICFA 將派員參加明年 1 月在日本神戶召開之區域性鮪類組織聯合會議、FAO COFI 會議（3 月）、OECD 漁業委員會之 Workshop on Globalization（4 月）、CITES 第 14 屆會議（6 月）及聯合國 Open-ended Informal Consultative Process on the Oceans and the Law of the Sea（6 月）等 5 項會議，另視情況需要派員參加 COFI 貿易次委員會所召開之有關 Traceability、VMS 及 Consultative Industry Forum 等 3 項專家或技術諮商會議。
- 四、 各與會者認為，本年 5 月在紐約召開之 ICFA 政策會議討論代表 ICFA 參加國際漁業會議之人選及 ICFA 對該會議議類之立場，為一良好之先例，應持續辦理。因此決定在明年適當時機，召開 ICFA 政策會議討論參加之人選及 talking points 外，並與聯合國或其他組織之官員就當前重要議題交換意見。
- 五、 會中推選 2007 年主席由西班牙漁業聯合會秘書長 Mr.Javier Garat Perez 接任；年費自 2007 年起調升至 3,000 美元；另 ICFA 秘書長由 NFI 國際組組長 Mr. Stetson Tinkham 兼任。基於 ICFA 預算有限，會中亦決議除 Mr. Tinkham 以 ICFA 秘書長身份參加國際漁業會議之旅費由 ICFA 負擔外，其他各會員參加國際漁業會議之旅費均自行承擔。
- 六、 ICFA 與會人員於 14 日赴 FAO 與該組織漁業處處長野村一郎（Ichiro Nomura）等官員就生態為基礎之管理（Ecosystem based management）、以海洋保護區為管理工

具 (Marine protected areas as fisheries management tools)、漁撈活動高敏感區 (Highly sensitive areas/fishing activities)、資訊缺乏區之開發性漁撈 (Exploratory fishing in data poor areas)、海洋生物多樣性 (Marine biodiversity)、FAO-CITES 備忘錄、捕撈漁業之經濟挑戰與生存 (Economic challenges/viability of capture fisheries)、MCS/VMS 問題、食品安全與品質體制 (Safety and quality regimes) 及水產養殖等 10 項議題交換意見。其中野村處長特別針對公海底拖網、海洋生物多樣性及 FAO-CITES 備忘錄議題加以說明。渠表示，不論是公海底拖網或海洋生物多樣性議題，皆非由 FAO 主動提出，而為確保漁業利益，FAO 被迫不得不參與以為因應。例如倘海洋生物多樣性按環境保護團體之原意加以發展，其後果必不利漁業之發展，因而 FAO 不得不介入，使「海洋生物多樣性」之概念及所採措施不會完全採納環境保護團體之看法。而 UN 及 CITES 皆是政治性質較顯著之組織，尤其係聯合國大會。因此 ICFA 雖建議公海底拖網議題應交由 COFI 來處理，但本案已由帛琉在聯合國提案，依慣例不太可能再交由 FAO 處理。FAO 俟接獲 UN 要求後，始會向 UN 提出對某議題之立場文件。但基於公海底拖網議題影響層面甚廣，為避免重蹈公海流網覆轍，其於今年 10 月間主動向聯合國大會遞交 FAO 對此議題之立場文件。基於此議題已交由聯合國大會討論，野村處長建議，宜由 ICFA 各會員代表向其政府反映；至於 FAO-CITES 之關係經過近 10 年之協調溝通，終於在今年 10 月簽署備忘錄，其重點有 3：(1)改善 2 組織間之聯繫溝通；(2)促進 CITES 會員國之能力建構；(3)對某一物種是否須列入 CITES 附錄加以保護，先由 FAO 提供科學性評估意見予 CITES 參考。

七、本次會議再次就是否有必要成立 International Coalition of Aquaculture Association (ICAA) 進行討論，儘管目前某些 ICFA 會員組織中並未將養殖漁業組織納入，但基於養殖漁業在水產品貿易之比重日益增加，最後與會者仍決議請各會員於會後提供該國養殖團體聯絡資料給 ICFA 秘書長，以便邀請該等養殖團體於 2007 年 ICFA 年會前或後，開會成立 ICAA。

參、心得與建議

- 一、參與此次年會之會員咸認野村處長對捕撈漁業團體至為友善，ICFA 主席並鼓勵各會員透過管道落實執行野村處長對公海底拖網漁業所提之建議。
- 二、各國代表雖認為養殖漁業活動範圍均在該國管轄範圍內，不像捕撈漁業活動範圍涉及國家管轄權外之水域，惟基於養殖水產品貿易日趨增加，為加強疫病管控及降低貿易障礙等，有必要成立國際性之養殖漁業團體聯盟（以平衡環保團體對養殖漁業之負面看法）。
- 三、ICFA 雖是非政府組織（NGO），但其成員均為各國具代表性之民間漁業團體，且 ICFA 為 FAO 之正式觀察員，由於我國國際政治地位特殊，經常以 ICFA 代表身分參加 FAO 會議為權宜之方法。除政府部門參與外，我方業者亦應踴躍參加，除可擴增國際觀，瞭解最新國際漁業議題發展外，亦有助於建立與相關國家民間團體聯繫之管道，以維護業者利益。

CANADA – Country Report

Overview

In 2004, Canada remained as the fifth largest exporter of fish & seafood products in the world with exports amounting to \$3.7 billion (\$US) to more than 120 countries. Seafood is Canada's largest food export. The US remained Canada's largest export destination with nearly two-thirds of its seafood products valued at \$2.3 billion sold in the US. Japan ranked second with Canadian seafood imports amounting to \$410 million. Exports to the EU increased to roughly \$390 million. China and Hong Kong followed at \$300 million.

The top three species exported from Canada were lobster, crab, salmon (farmed and wild) with a combined value of \$2 billion. They account for 55% of Canada's seafood exports. Lobsters were \$780 million, followed by crab, worth \$760 million, and salmon at \$470. Other major exports included herring, scallops, cod, halibut, and clams, with a combined value of \$490 million. These figures demonstrate that the Canadian industry is staying competitive despite the significant increase in the Canadian dollar against the US dollar and the Japanese yen.

With respect to landings, the capture fishery landings amounted to \$1.85 billion while aquaculture contributed \$480 million and the freshwater fishery, \$70 million.

The fishing industry provided jobs to 60,300 fishermen and 29,200 full-time equivalent employment in the processing sector. In addition, there are 7,200 jobs in the aquaculture industry. The commercial fleet is comprised of roughly 22,800 registered vessels.

Canadian seafood imports have been trending upward over the past decade, growing at a compound rate of 6.5%, reaching \$1.6 billion. The US captures 45% of this market followed by China, Thailand, Vietnam, Chile, and India.

ISSUES

Stock Conditions

- **Pacific Sockeye Salmon.** The annual returns of Pacific sockeye salmon have continually decreased in recent years. This year has been particularly alarming because the predicted high return of the Fraser River run (Canada's largest) has yet to materialize.

There is an emerging consensus that environmental factors (i.e. ocean warming, Fraser River warming) are causing significant disruption to survival and migration routes of Pacific salmon.

- **Atlantic snow crab.** With the severe decline of Atlantic Canada's groundfish stocks, snow crab and cold water shrimp emerged to replace the cod, pollock, flounder resources. While the shrimp resource continues to grow, snow crab is a cyclical species and is showing signs of decreasing. Unfortunately, in the harvesting sector little rationalization actually occurred when the groundfish resource decline, being mainly transferred to crab and shrimp. As such, any downturn in the crab resource will cause significant economic and social hardship on coastal communities in Newfoundland.

Endangered Species.

- Canada recently introduced endangered species legislation which makes it illegal to kill, harm, etc. an endangered or threatened species. The science arm of the legislation has been very aggressive in studying marine fish and making designations. A number of the upcoming designations will be species that are sometimes caught as bycatches in approved fisheries. The industry and government are trying to develop protocols to address these situations. However, there will be significant disruption to Pacific salmon fishing, Atlantic groundfish fishing, and some possible disruption to Atlantic lobster fishing.

Trade Policy

- **EU – Cooked & Peeled Shrimp.** A significant portion of Atlantic Canada's growing shrimp resource has been allocated to the inshore fleet which lands it for processing into cooked & peeled shrimp. The only significant market for the product is the EU, namely the UK, Denmark, and Sweden. The import tariff duty is 20%. However, the EU has established a 6%, 7,000mt autonomous import quota for the import of cooked & peeled shrimp for further processing in the EU. This quota was fully utilized in 2004 by mid-July. In 2005, it was absorbed by mid-January. There is an urgent need to get the import quota increased to at least 14,000mt as the sector is becoming uneconomic.

Fisheries Management

- Significant consultations and reports have been developed regarding the modernization of the Atlantic fisheries overall and the Pacific salmon fisheries. Amendments to the

Fisheries Act are required to implement the changes. The Fisheries Act has not been amended in over 40 years because of the political sensitivities of the fisheries in Canada's coastal areas. The major participants in the fishery support the directions. Getting the government to take the next step has proved exceedingly difficult.

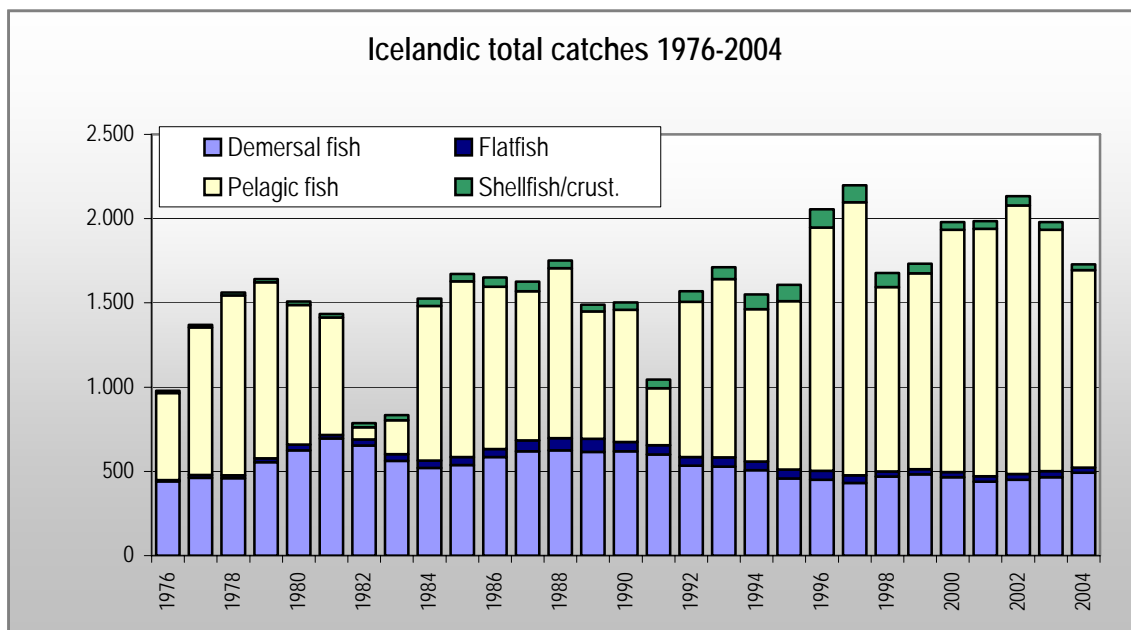
- As the fisheries department grows to become an oceans department, there is a struggle to ensure the mandated fisheries responsibilities (stock assessments, surveillance & enforcement, etc) are not undermined.

Icelandic Fisheries 2004

Total Icelandic Catch – All Fishing Banks

Icelandic catches from all fishing banks in 2004 amounted to 1.728.000 tonnes, a 12,7% decrease from 2003. The decrease was due to a smaller catch of pelagic species. The total value of the catch stayed the same despite the decline of the catch.

Though Icelanders have not been able to top the record fishing year of 1997, when catches reached 2.200.000 tonnes, last years catches are not far away.



Source:

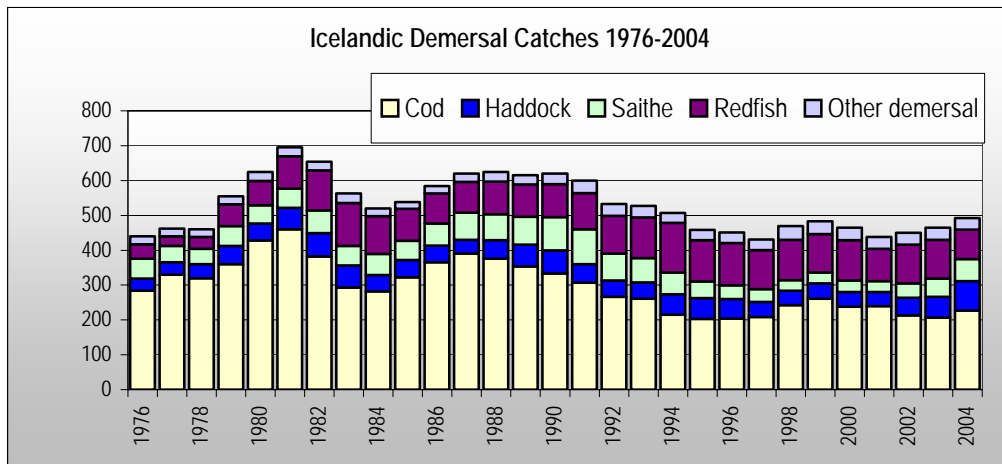
Fisheries Association/Statistics Iceland

There is a 5,9% total increase in demersal catches between 2003 and 2004. The catches of flatfish, pelagic fish and shellfish all show considerable decrease between 2003 and 2004. The flatfish is down by 14,8%, the pelagic fish by 18,2% and the shellfish by 28,5%.

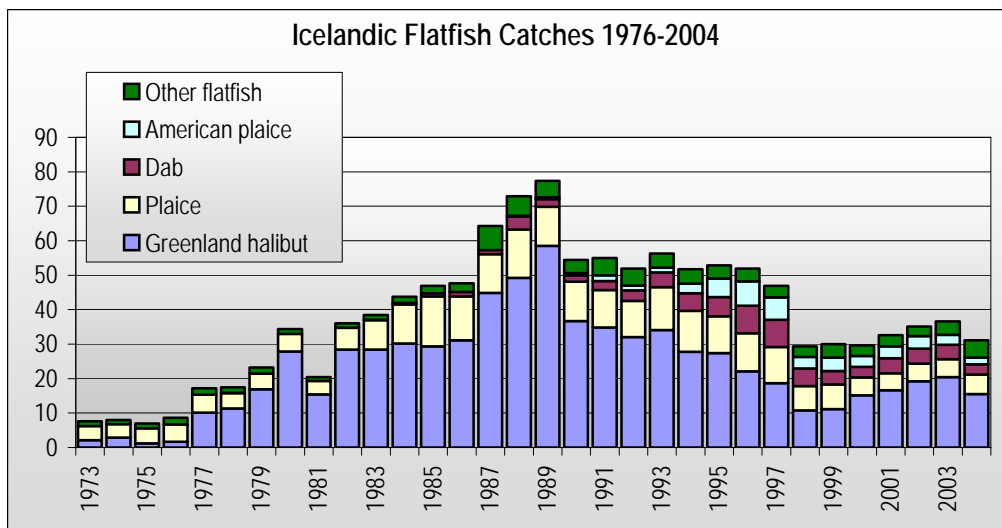
About 88% of the total Icelandic catches are from Icelandic fishing banks which is the same proportion as in 2003 compared with 91 % in 2002 and 98% in 2001.

Demersal and flatfish catches

The demersal catch has been fairly stable the past few years, but increased by around 5,9% from 2003 up to 492.000 tonnes. There was a considerable increase in catches of all major demersal species. Cod catches increased to 227.000 tonnes from 206.000 tonnes and both Haddock and Saithe showed respectable increase from the previous year. Catches of Redfish decreased from 111.000 tonnes in 2003 to 84.000 tonnes in 2004.



Source: Fisheries Association/Statistics Iceland

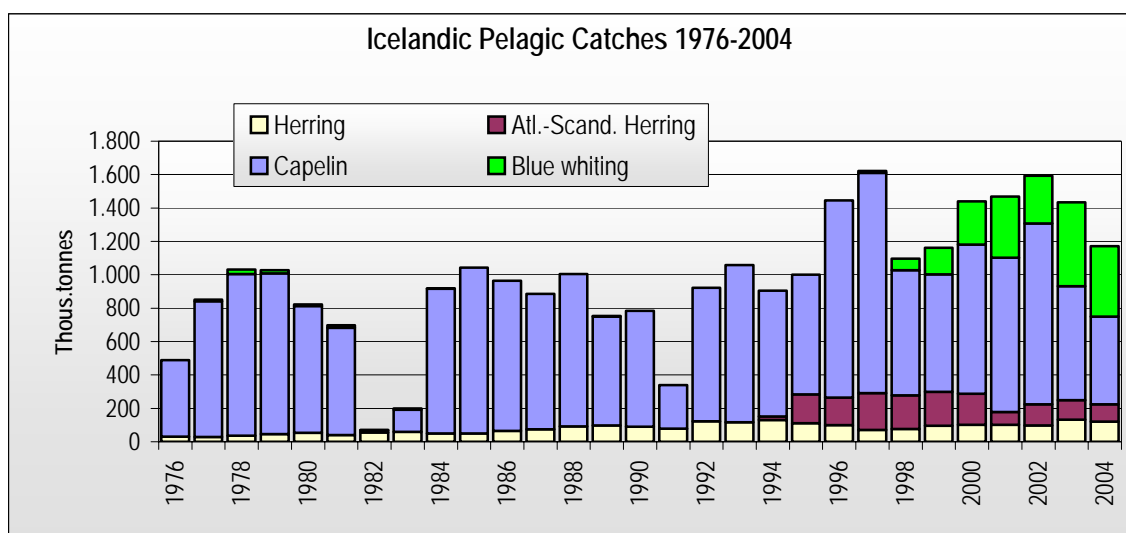


Source: Fisheries Association/Statistics Iceland

Flatfish catches decreased to around 31.000 tonnes from 36.500 tonnes 2003, and are still low compared to catches the past 10-20 years. A high of 77.000 tonnes was reached in 1989. The Greenland halibut catches decreased by 24% after four years of increase. The catches of other flatfish species remained stable.

Pelagic catches

Mostly consisting of capelin and herring the pelagics can be held accountable for the largest fluctuations in the total Icelandic catch. The past two decades have given pelagic catches from the low of 72.000 tonnes in 1982 to the high of 1.620.000 tonnes in 1997. The 2004 catch amounted to 1.171.500 tonnes, a 18,2% decrease from 2003 and the lowest figure since 1998. Catches of Atlantic-Scandian herring decreased to 103.000 tonnes from 118.000 tonnes in 2003, which is higher than the 2001 low catch of 77.000 tonnes, but still lower than the 1995-2000 catches. Catches of Blue whiting ended in 422.000 tonnes, which is a 16% decrease from the previous record year but still the second highest catch since Iceland started that fishery seven years ago. The second year in a row, the Capelin catches decreased and ended in 516.000 tonnes, which is the smallest Capelin catch for years.

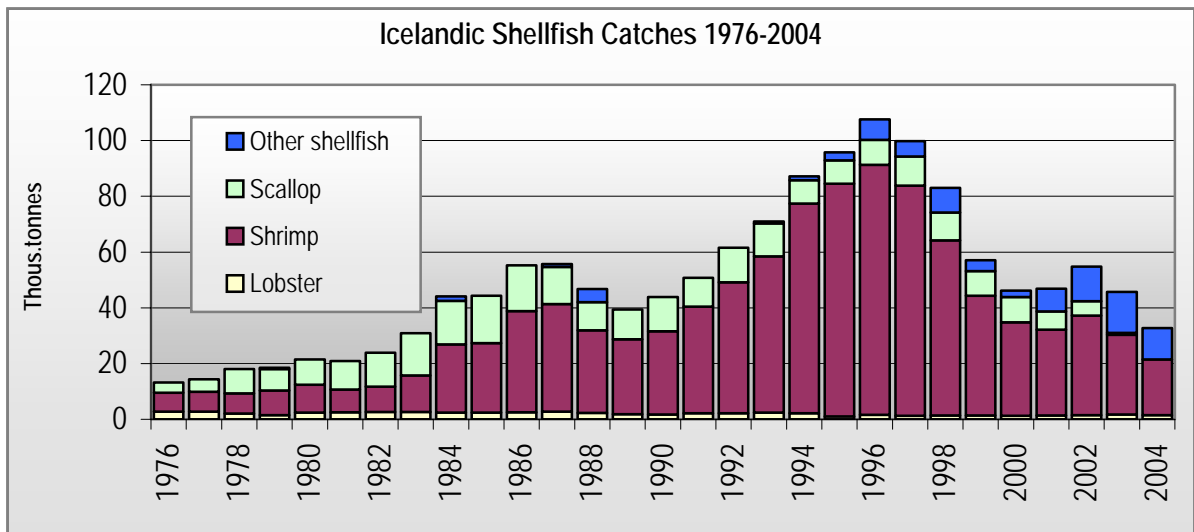


Source:

Fisheries Association/Statistics Iceland

Shellfish and Crustaceans

Total shellfish catches decreased in 2004 by 28,5%, and are still low in comparison with last decades average. Last years shrimp catches reached 20.000 tonnes; thereof 3.600 tonnes came from the Flemish Cap. Scallop catches have been decreasing for the last few years and collapsed in 2003 and 2004. The 2004 lobster catches of 1.437 tonnes, were down from the previous year and still lower than the historical average of approximately 2.000 tonnes. Other shellfish are these past few years, mainly Icelandic cyprine, which reached 10.400 tonnes in 2004, a small decrease from 2003.

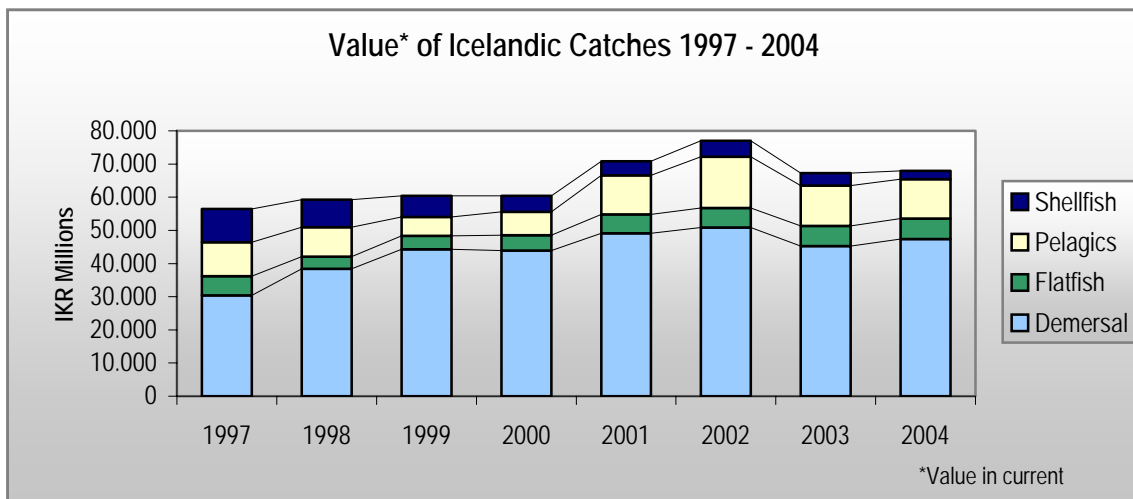


Source:

Source: Fisheries Association/Statistics Iceland

Catch Value

The total first hand value of the Icelandic catch was around 67 billion IKR (1.050 million USD) in 2004 that is the same value as the previous year. This can be considered satisfying result in the light of 12,7% decrease in total catch volume.



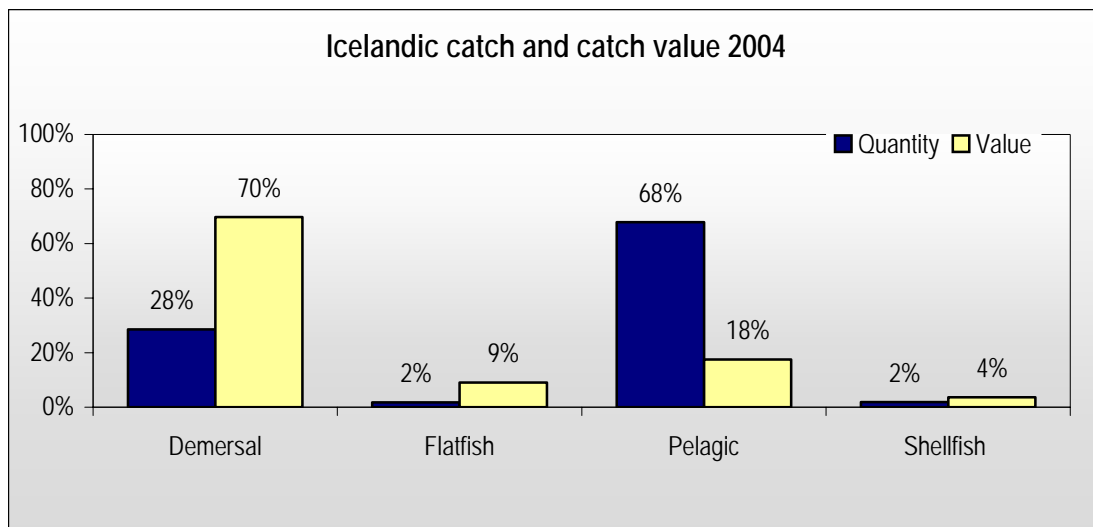
Source:

Source: Fisheries Association/Statistics Iceland

It should be noted that these are current price figures.

In 2004 demersal species accounted for 70% of the value, 47 billion IKR (735 million USD), but only 28% of the catch volume. Pelagics on the other hand only contributed to around 18% of the value, 12 billion IKR (188 million USD), but 68% of the volume. Cod keeps its place as single most important species in the Icelandic fisheries with 41% of the value of total landings, but only

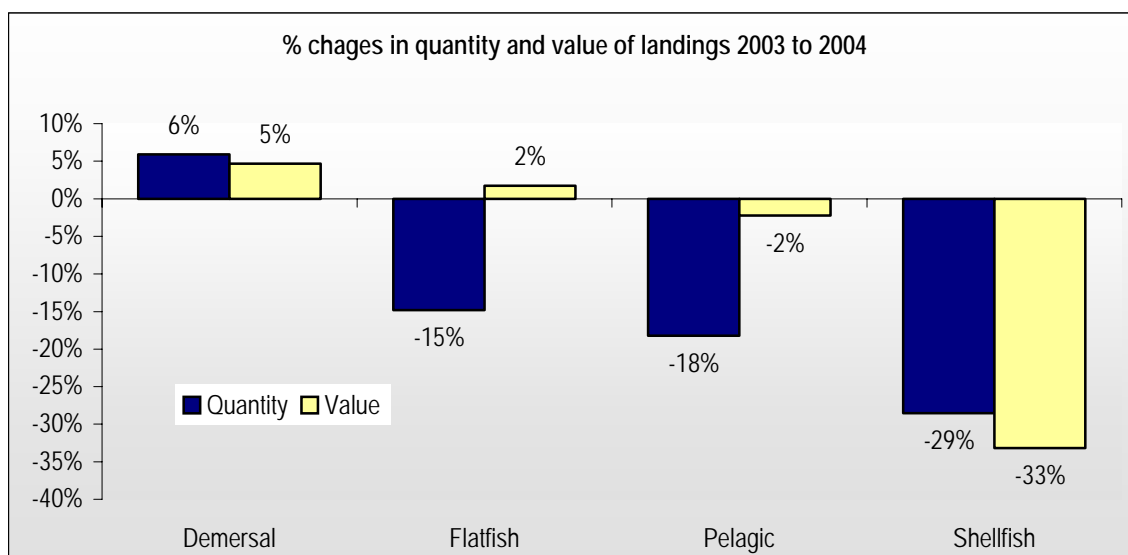
13% of the volume.



Source:

Statistics Iceland

The landed value of both Pelagic and Shellfish catch decreased from 2003 to 2004 especially was the decrease sharp for the Shellfish both in value and quantity. The landed quantity in Pelagic catches decreased by 18% but the value only 2%. This is because bigger share of the Herring catch was frozen which gives much higher value.



Source:

Statistics Iceland

Additional information about Icelandic fisheries can be found on these websites:

www.fisheries.is

www.hafro.is

www.fiskistofa.is

COUNTRY REPORT - JAPAN

- Major Challenges for Japan's Fishing Industry -

2006 ICFA ANNUAL MEETING - ROME, ITALY, NOVEMBER 2006

1. THE EXPORT OF HIGH QUALITY JAPANESE MARINE PRODUCTS

Although Japan is known as the biggest importing country of agricultural products and seafood, the Ministry of Agriculture Forestry and Fisheries has adopted a policy to promote the exports of such products. The policy is called “Positive Agriculture Policy” and its target is to double the export amount in 5 years (2004-2009). The policy includes (1) supplying useful information to the industry and hosting food fairs and temporary workshops to promote exports of Japanese food, (2) making necessary adjustments internally to cope with the requirements of importers by examining and adjusting to tariffs and quarantines of importing countries, and (3) protection of product brands and intellectual property rights and the adjustment of domestic production and distribution to export businesses. One favorable factor contributing to the promotion of this policy is increasing demand for seafood in foreign markets. Across Europe and Asia, seafood consumption is jumping upstream, its economic tail thrashing powerfully.

2. EFFORTS ARE BEING CONTINUED TO ENSURE THE SUSTAINABLE USE OF WORLD TUNA RESOURCE AND THE CONSERVATION OF THE MARINE ECOSYSTEM

IUU fishing seems to shift from larger vessels to smaller vessels. Concern is also growing on the situation that number and capacity of tuna fishing vessels are still increasing and that tuna farming is rapidly expanding, even though most of the tuna stocks are fully exploited or overexploited. Good efforts to reduce the incidental catch of sea turtles and seabirds are continuing by implementing various measures such as circle hooks, tori-poles, etc. The joint meeting of tuna RFMOs is scheduled to take place in Japan in January 2007 in an effort to achieve a global consistency in tuna conservation and management measures.

3. ECOLABELING IN JAPAN

(1) MSC's activities

The MSC has been exhibiting in the JFA seafood show for 4 or 5 years and trying to promote MSC labels in the Japanese industry. The MSC has rapidly intensified its activities this year, and

Japanese companies have started to either acquire or apply for the MSC certification. The MSC has made this year the special year for the MSC to promote its labels, and has had some promotional events.

Kyoto (May, 2006)

Sponsor: TQCSI (certifier based in Australia)

Tokyo (May, 2006)

Sponsor: Global Environmental Forum (GEF)-Environmental NGO

Typical doomsday presentation

Nature magazine, World ocean – only jellyfish will be left

Japanese government - pagans (whaling issue)

Greenpeace rating of Supermarkets in UK

MSC - solution

The MSC has decided to set up a branch office in Japan within one year (presumably before the summer of 2007) and made a contract with a Japanese consultant. The MSC has also started to communicate frequently with the JFA, asking for help.

(2) State of certification in Japan

1) COC certification

In May 2006, Kamewa Shoten in Tsukiji, Tokyo, obtained the MSC COC certification for the first time in Japan. The company is selling the MSC certified Alaska salmon at supermarkets and through the internet.

In August 2006, Watarai Corporation in Shiogama City, Miyagi, obtained the MSC COC certification. The company is selling MSC certified Pacific cod caught in the Bering Sea and the Aleutian Archipelagos to large supermarket chains.

2) Fishery certification

Danish Sein fishery for snow crab and flathead flounder in Kyoto Prefecture was identified as a candidate for MSC certification. A preliminary assessment was completed.

3) Retailers

National Azabu Supermarket (Kamewa shoten)

Aeon company limited

(3) JFA

JFA established an ecolabeling task force to discuss the problem, with the objective of making a decision during 2006.

Some of the reactions of the industry people:

Japan should launch its own labeling, instead of leaving the MSC labels to spread in Japan.

Distribution of 'White paper', explaining sustainability of fisheries as a whole will be a useful measure.

4. REMARKABLE PROGRESS ON WHALING ISSUES

This year there were two developments demonstrating remarkable progress on whaling issues.

One is the adoption of the St. Kitts declaration at the 57th IWC meeting in St. Kitts in June.

Another is the resumption of commercial whaling in Iceland in October.

The St. Kitts declaration clearly stated that the whaling moratorium is no longer necessary, and expressed a commitment to normalizing the functions of the IWC.

To meet this commitment, a conference for normalizing the IWC will be held in Tokyo from February 13 to 15th.

Considering the fact that Iceland rejoined the IWC with its objection of the whaling moratorium , Iceland's resumption of commercial whaling is a very legal and laudable act.

Country Report Korea

International Coalition of Fisheries Associations
Annual Meeting

Rome, Italy
November 2006

1. Fishery Production

Korea's fishery production in 2005 totaled 2,714,000 metric ton(MT) including seaweed. That was an increase of 7% from previous year. The growth was due to aquaculture and stock management. Meanwhile, declining quotas for pelagic fisheries, cuts in new authorizations for fishing and the vessel buyback program are negative factors for fishery production growth.

Table 1 < Total Production >

(unit : thousand MT)

Year	Total *	Coastal &Offshore	Aquaculture	Inland	Deep Sea
1999	2,909	1,335	765	18	791
2000	2,514	1,189	653	21	651
2001	2,665	1,252	655	18	739
2002	2,474	1,095	781	18	580
2003	2,483	1,094	826	19	544
2004	2,519	1,077	918	25	499
2005	2,714	1,097	1,041	24	552

* seaweed included

2. Fishing Vessels

The number of fishing vessels decreased by 5,155, from 95,890 vessels (923,099 G/T) in 2000 to 90,735 vessels (700,810 G/T) in 2005. The

decrease in number and gross tonnage was the result of the government's fleet reduction program.

Korea spent \$710 million from 1994 to 2003 to reduce the fleet size by 2,562 vessels. Also, under the vessel buyback program, about 6,300 vessels of total coastal fishing vessels are scheduled to be removed from operations gradually by 2008.

3. International Trade

The trade balance in fishery products has been in the red since 2001. In 2004, the deficit amounted to about \$1 billion and about \$1.2 billion in 2005.

The demand for fishery products is far beyond the Korean industry's fishery production. So Korea imported \$2,261 Million in 2004 and \$2,383 Million in 2005.

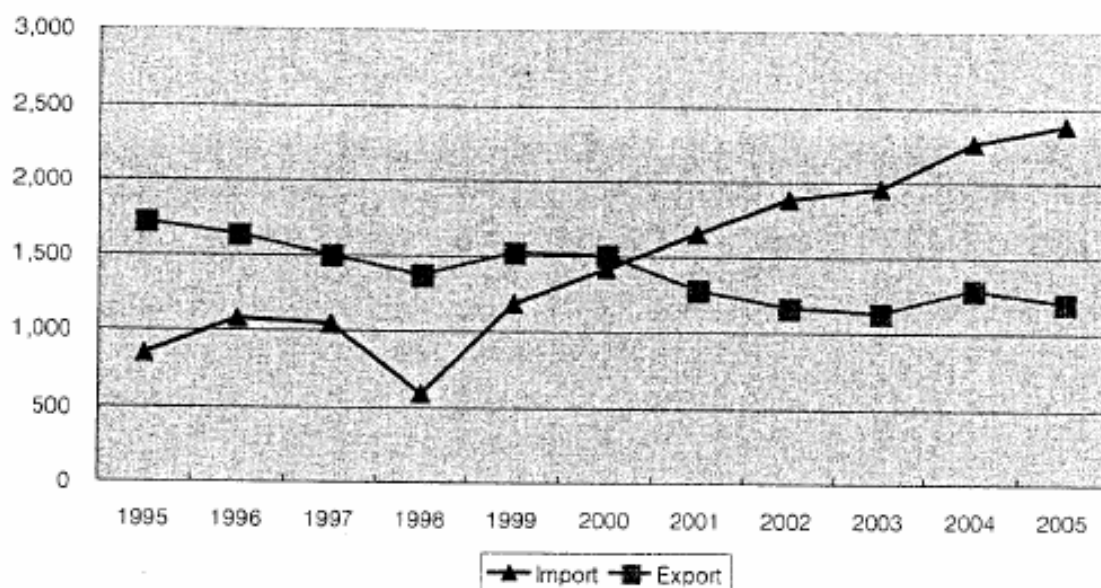
Korea's exports of fishery products have been maintained at over \$1.5 billion since 1987. But since 2001, it has been declining due to stagnated production and largely expanded domestic consumption.

Table 2 < Exports & Imports of Fishery Products >

Year	Exports Value (Million \$)	Imports Value (Million \$)
1999	1,521	1,179
2000	1,504	1,411
2001	1,273	1,648
2002	1,160	1,884
2003	1,129	1,961
2004	1,278	2,261
2005	1,193	2,383

However, the import of fishery products has been rising sharply, with imports in 2004 reaching about \$2.2 billion. This trend is expected to continue along with trade liberalization such as FTA and WTO.

Graph 1 < Trade Balance >



4. Fishery Issues

4-1. FTA talk

Along with the global trends of proliferation of regional trade agreements, Korea is actively involved with the bilateral negotiations for the conclusion of Free Trade Agreements (FTAs). On February 16, 2004, Korea ratified its first FTA with Chile. Until now Korea signed FTA with Singapore (Effective from March 2, 2006), EFTA (finalized on Dec. 15, 2005), FTA with ASEAN (Products Trade Agreement finalized on May 16, 2006) and currently talks for Korea-U.S.A. FTA are proceeding.

Such bilateral trade negotiations will substantially improve market access to fisheries of each side and promote mutual benefits for and cooperative relationship between the parties to the FTAs.

4-2. Fishery subsidy issue in the WTO negotiations

Discussions on the package abolition of fishery subsidies should be held only after the correlation between fishery subsidies and resource depletion is closely examined in spite of suspension of World Trade Organization negotiations. Some subsidies that help restore fisheries resources and protect the marine ecosystem need to be sustained and expanded further.

In the case of abolishing or reducing fishery subsidies, a considerable period for implementation and postponement is certainly required to adjust to the changes in external conditions.

4-3. Community based fisheries management system

A new framework for 'community based fisheries management system' was launched in 2001 in order to encourage active participation of Korean fishermen. It aims to build strong infrastructures for promoting sustainable fishery production, resolving fishery-related disputes, and boosting fishermen's income as well as enabling fishing villages viable.

Korea's community based fisheries management system focuses on coastal fisheries in need of public aid, especially small-scale fisheries, to ensure fishermen's livelihoods. Over a five-year experimental period, it has been implemented with fishermen's voluntary participation, as part of Korea's 'New Fishing Village Movement'.



COUNTRY REPORT - NEW ZEALAND

Key Indicators

- Seafood ranks as New Zealand's fifth largest export goods earning sector – after dairy products, forestry, meat and horticultural products;
- Seafood exports earned NZ\$1.27 billion in the year to 30 June 2005 – nil growth on the previous year following two years of negative growth principally due to a strong domestic dollar;
- Domestic sales are estimated to be about 10% of the total of export sales

Key species in the year to 30 June 2005 c.f. 2004 were:

• Species	June 2004	June 2005
• Hoki -	NZ\$199 million	NZ\$167 million
• Squid -	NZ\$164 million	NZ\$160 million
• Greenshell Mussels -	NZ\$132 million	NZ\$156 million
• Rock Lobster -	NZ\$109 million	NZ\$110 million
• Orange Roughy -	NZ\$ 76 million	NZ\$ 90 million
• Abalone/Paua -	NZ\$ 53 million	NZ\$ 53 million
• Ling -	NZ\$ 48 million	NZ\$ 47 million
• Farmed salmon -	NZ\$ 41 million	NZ\$ 31 million
• Hake -	NZ\$ 35 million	NZ\$ 45 million
• Snapper -	NZ\$ 28 million	NZ\$ 27 million

Commercial environment

The New Zealand industry has had a commercially challenging 30 months and the outlook is for the challenges to continue. A strong New Zealand dollar, which peaked at a rate to the US dollar of just over 70 cents late in 2003, has traded in the high 60s to low 70s ever since. The strong squid catch and trading results in 2004 and 2005 contributed additional sales revenue of NZ\$100 million in each year, but sales otherwise have stayed at levels similar to 2003.

The reduction in the hoki TACC, costs of fishing and costs of fuel have been cited as catalysts for some companies to lay up vessels, and in some instances putting them up for sale. The debate in the industry on the need for rationalisation has been energised.

New Zealand currently has one of the lowest rates of unemployment among OECD member countries – less than 3% overall. There is a severe shortage of skilled labour. Fishing companies have sought and received approval to recruit foreign crew to work on New Zealand owned and

operated vessels.

There is concern about the impact of government charges on commercial viability as the sector manages through unavoidable market difficulties. The New Zealand industry pays the full costs of fisheries management, research and compliance – about 6% of landed value of catch.

Political Environment

The difficult political environment for the seafood industry in New Zealand continues. There is a general election scheduled for 17 September. There will continue to be a coalition government and one scenario would be a coalition involving the Green party, which could have implications for the Seafood industry..

Last year's report noted the New Zealand government's intent to place at least 10% of the exclusive economic zone (the fourth largest in the world) under marine protection. This intention continues, with several initiatives awaiting the outcome of the election. These include the development of an Oceans policy, Marine Protected Area Strategy, and Marine Reserves legislation.

Development of the aquaculture sector, stalled for more than three years under a moratorium on new development, is able to recommence under restricted terms following passage of new legislation. A new aquaculture strategic development plan is being prepared by the sector.

The environmental NGO campaign to promote a moratorium on bottom trawling on the high seas has continued and the government's position remains equivocal. An announcement on new policy to manage the environmental effects of fishing has just been announced.

Regional Fisheries Interests

New Zealand, Australia and Chile are jointly sponsoring the negotiation of a regional fisheries management agreement for the southern Pacific – from the south-western edge of West Australia cross the Pacific Ocean to Chile. The proposal would be for the agreement to include all non-tuna and highly migratory fish species. The key straddling and high-seas fish stocks are jack mackerel, orange roughy, deep-sea dorids, alfonso and rock lobsters. The first negotiating meeting will take place in New Zealand from 14 to 17 February with further negotiations at 6 month intervals over the next three or more years.

The New Zealand industry has strongly supported the proposal and urged that effort be made to negotiate a comprehensive agreement based on the Fish Stocks Agreement and best practice. There is strong NGO pressure for the negotiating parties to adopt “preliminary measures” in advance of a final agreement. These could range from data gathering and sharing through to closed areas and limits on some fishing methods. The industry would strongly oppose the adoption of many of these measures prior to the agreement of an RFMO.

Country Report
Taiwan

1. General description of the fishery

The fishery of Taiwan can be classified into four categories, including far seas fishery, offshore fishery, coastal fishery and aquaculture. In terms of production, far seas fishery surpasses the other three fisheries, followed by aquaculture, while coastal fishery falling behind all others. The status of those fisheries in 2005 is generally described as follows:

(1) Far seas fishery:

- A. Far seas fishery refers to the fishery operated outside Taiwan’s own 200-mile exclusive economic zone. The major fishing methods include tuna longline fishing, tuna purse seine fishing, trawling, squid jigging and torch light saury fishing, in which the fishing grounds of tuna longliners cover the high seas areas of all major oceans of the world, using foreign base ports to support their operation.
- B. The annual production of far seas fishery in 2005 reached 756,613 M/T, accounting for about 58 % of the total fisheries, showing an increase of 49,796 M/T compared to the previous year.

(2) Offshore and coastal fisheries

- A. Offshore fishery refers to those fishing activities performed within Taiwan’s exclusive economic zone from 12 to 200 miles from the base line, while coastal fishery performed within 12 miles territorial seas of Taiwan. The major fishing methods include trawling, ring net fishing, purse seine fishing, gill net fishing, longline fishing, etc.
- B. The annual total production of offshore fishery and coastal fishery in 2005 was 254,832 M/T, accounting for about 19 % of the total fisheries, showing an increase of 565 M/T compared to the previous year.

(3) Aquaculture

- A. There are three major types of aquaculture, namely fresh water pond aquaculture, brackish water pond aquaculture and mari-culture.
- B. The annual production of aquaculture in 2005 was 307,274 M/T, accounting for 23 % of the total fisheries, showing a decrease of 19,125 M/T compared to the previous year.

The details of fisheries production and value in 2005 compared to the previous year are shown in the following two tables (Table 1 and Table 2):

Table 1. Various Fisheries Production in 2005/2004

Unit: Metric Ton

	2005	2004	Growth Rate %
Grand Total	1,318,717	1,287,481	2.43
Far Sea Fishery	756,613	706,817	7.05

Offshore/Coastal Fisheries	254,830	254,265	0.22
Aquaculture	307,274	326,399	-5.86

Table 2. Value of Fisheries Production in 2005/2004

Unit: Thousand NT\$

	2005	2004	Growth Rate %
Grand Total	92,313,390	99,264,530	-7.00
Far Sea Fisheries	4,2997,800	47,452,840	-9.39
Offshore/Coastal Fisheries	18,154,770	20,375,550	-10.90
Aquaculture	31,160,820	31,436,140	-0.86

2. Key programs and activities in 2005-2006

(1) Vessel reduction program

For conserving and managing fisheries resources, a collective “fishing capacity reduction program” has been launched aiming to ensure the fishing capacity will be commensurate with the tuna catch quotas allocated from regional fisheries management organizations. According to the program, 59 large-scale (more than 100 gross registered tonnage) tuna longline vessels were scrapped in 2005 and the other 101 vessels have been under scrapping in process in 2006, and will be completed by end of 2006. There for, a total of 160 vessels large-scale tuna longline vessels will be reduced by end of 2006.

(2) Holistic reinforcement of management on far seas fishing fleet

For being consistent with the resolution adopted by the RFMOs, a holistic approach with several stringent measures has been taken by the competent fisheries authority, including management of catch at-sea transshipment, conduct of deploying observer on board program with satisfactory coverage, implementation of port inspection, conduct of VMS program, investigation of IUU fishing activities, enactment of a special management law for governing our nationals in foreign countries in terms of fishing vessel and fishing activity, etc.

(3) Safety management of fishery products

To improve the quality of cultivated fish and shellfish, lectures on the aquaculture management for fish farmers, random hygienic inspections were performed in fishery products, and fish/shellfish farming surroundings were periodically monitored. The fisheries authority has also tightened the restrictions on drugs added to fish feeds and the detection of drug residues in fishery products. The results serve as a red flag warning, which helps the authorities take the appropriate precautionary measures. In addition, a traceability system for monitoring sanitation of fishery products similar to EU system has been established for tracing the flow of the fishery products. At the first stage, various species on farming fish have been chosen for the pilot program.

3. Future prospect

After encountering international accusation in terms of management of far seas fisheries and a row over

food safety in the domestic fishery market in the past years, the government and the industry have reached consensus for their future efforts, with anticipation to reach goals covering premium quality, products safety, recreation orientation, environment friendliness, and fishermen's welfare. In the future the fisheries authority will pay more attention to the participation in international fisheries organizations and promotion of responsible fisheries, and enhancement of vessel control and management, as well as suitable adjustment of the fishing capacity. The technology of aquaculture should be upgraded, and production of fish farms should be conducted in a professional and sensible manner, and coupling with the development of product traceability system, consumer safety of seafood can be ensured, so as to improve full dimensional business operation system in fishery. It is envisaged under the combined efforts of the private sector, the government and the academics, with diversified cultural value of seafood, Taiwan's fishery will be sustained, in the manner of full satisfaction to fishermen, consumer safety and total healthiness, with blessing vision from the entire population.

USA
COUNTRY REPORT

CURRENT CLIMATE

The National Fisheries Institute (NFI), the seafood community, and our individual members face daily challenges in their business environment. Each year, NFI prioritizes the issues it will emphasize and directs resources towards these efforts. A variety of factors are taken into consideration when deciding which issues to prioritize. Some of these factors include: current impact on the seafood business; breadth of impact on seafood business (does it affect more than just a few businesses); potential impact on seafood business (will it set a precedent for future action); what is the possibility that the issue will have political implications (will there be federal agency, Congressional action or media attention); and are there other organizations involved. The following issues are NFI's priorities for this year and 2006.

PRIORITY ISSUES FOR 2005-2006

- **Benefits of Seafood and Related Food Safety and Allegations of Contaminants in Seafood:** Health professionals continue to encourage Americans to eat fish because of its positive health benefits. Environmental and other activists realize that food safety is an effective media “hook” and use questions of seafood safety to advance other policies. The media will continue to highlight mercury, dioxins and PCBs, PBDEs, and other contaminants and these reports will impact consumers' buying decisions. NFI has developed a comprehensive communications strategy, based on credible scientific studies, to ensure consumers continue to feel comfortable eating seafood as part of a healthy diet.
- **Economic Integrity in the Seafood Community:** Economic integrity leads to greater consumer confidence in food products. Questions of trans-shipment of products subject to anti-dumping and countervailing duties, species substitution, mislabeling of weights or counts of products will erode customers' confidence in seafood. NFI is developing an intra-NFI process regarding membership rights for companies who demonstrate a lack of economic integrity; an inter-business process for the seafood community to consider when dealing with issues of economic integrity; strategies to engage government appropriately in ensuring economic integrity; and effective tools to communicate to the public the industry's commitment to economic integrity.
- **Provide Continued Access to Fishery Resources:** The seafood industry faces significant challenges to continued access to fisheries – from environmental activists alleging over-

fishing and destructive fishing practices to prospective changes during the upcoming Magnuson-Stevens Fisheries Conservation & Management Act reauthorization. As part of a broad communications program, NFI emphasizes the environmental stewardship success of the industry. The results of this long term effort will be continued consumer confidence in seafood sustainability and seafood purchases.

- Challenges to International Trade in Seafood: Seafood is a highly-traded commodity and access to markets and products from around the globe is central to the success of the seafood community. NFI works with government and other industries to reduce tariffs on exports of domestic products. NFI is developing a program to better educate related industries and government about the economics of the seafood industry – including that the U.S. imports over 80 percent of the seafood consumed by American families.
- Challenges to Aquaculture as a Safe Supply of Seafood: America’s fisheries are operating at maximum sustainable yield. As health professionals encourage Americans to eat more seafood, the industry must identify new sources to meet the expected growth in overall and per capita consumption of fish. NFI will work with scientific and industry experts to develop strategies and to better communicate the country’s reliance on farmed fish, both domestic and imported. This effort will also include ensuring that aquaculture is practiced in a sustainable manner.

KEY PROGRAMS AND ACTIVITIES

Health Benefits and Contaminants

Seafood health information, both positive and negative, continues to draw substantial attention from the media, local communities, and the general public. Consumers are confronted almost daily with news stories describing the health benefits associated with omega-3 fatty acids or the advantages of maintaining a low-fat, high protein diet. Conversely, there is also frequent news coverage alleging the various risks of seafood consumption.

In the past six months, NFI has taken steps to build the infrastructure in order to respond in a proactive manner. NFI has developed an eighteen-month calendar which includes all legislative, regulatory, and other industry-related events or conferences. This calendar will allow NFI staff to better plan our advocacy efforts. NFI is also developing a bibliography of relevant journal articles and list of quotes from well-known health and scientific organizations which support the arguments for the health benefits of seafood. This information will allow NFI to readily respond to the skeptical reporters and interest groups the industry confronts daily.

Finally, continued outreach to academia, scientists, and think-tanks will help the industry build a rapid response team on contaminant and health-related issues for the media. The approach is to enlist and have readily available researchers to address the media on these findings and to offer a scientific perspective and analysis. One of the most important things the seafood industry can do is to provide reporters with balanced research, studies, and reports in order to counter the information they will receive from environmental organizations and other interest groups.

Trade Policy

The seafood industry is only one segment of the U.S. economy that is threatened by restrictive policies that can harm the growth of international businesses. NFI has joined forces with several trade task coalitions in Washington, D.C. which are designed to promote the issues of free trade within the public policy framework. This year, NFI joined the Food Trade Alliance and the Consuming Industries Trade Action Coalition (CITAC). These organizations were formed with the specific purpose of ensuring that consuming industries have access to reliable supplies of globally-priced materials necessary for the processing and manufacturing of their products through global trade reforms. Through these various trade-based coalitions, NFI is able to leverage a broader base of companies; appeal to Congress to support open trade policies; and voice our concerns about specific tariff lines on seafood exports which create the most problems for the domestic seafood community. NFI is beginning to work with the U.S. federal agencies, including the Office of the United States Trade Representative (USTR). NFI will compile data on the seafood tariff lines and submit the report to USTR for use in ongoing WTO trade negotiations.

World Trade Organization Negotiations: The ongoing Doha Round of WTO trade negotiations are slow moving, but they provide NFI an opportunity to actively affect the trade barriers such as tariffs, subsidies and quotas that are a concern to the U.S. seafood industry.

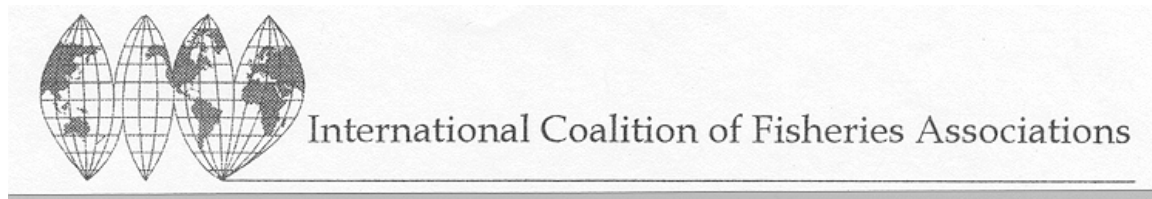
Aquaculture Policy and Advocacy

Our domestic fisheries are generally sustainably managed and offer a wide variety of seafood. However, ocean fisheries cannot produce the increased harvests needed to satisfy our nation's rising demand for fish. Marine aquaculture is one possible option for meeting increasing consumer demand for seafood products and offering new and alternative employment opportunities for American workers. Farmed fish can be a complement and supplement to, but not a replacement for, wild caught fish. The nation must develop a regulatory framework under which marine aquaculture can thrive, while also protecting the environment and accounting for the interests of other users of our federal waters.

NFI is actively involved in legislative efforts regarding aquaculture at the state and federal level. Our objective is to ensure that aquaculture as a method of production is treated equitably and not stigmatized.

Our current aquaculture policy calls for commercial aquaculture producers to ensure that they do not adversely affect any wild stock through habitat degradation, the spread of disease, use of non-certified chemicals and drugs, improper wastewater disposal, and introduction of any unauthorized species into the wild. NFI's policy advocates that fishermen and fishing communities be consulted during the planning and development of aquaculture facilities.

NFI will educate key Members of Congress who sit on the respective Congressional committees about the concepts of responsible aquaculture. Additionally, NFI will work to gain additional support from Senators and House of Representative Members who already have a positive view of aquaculture and whose States and Congressional Districts are home to some key NFI member companies reliant upon aquaculture products.



Bottom Trawling

2006

Whereas ICFA:

- Notes that more than 90% of fishing activity takes place within nations' Exclusive Economic Zones and that bottom trawling is the major fishing method used around the world, accounting for more than 60% of production.
- Notes that trawling is acknowledged to be a sustainable fishing method contributing to global food supply and security.
- Rejects assertions that bottom trawling is a destructive fishing practice.
- Disputes some environmental NGOs unsubstantiated and unscientific claims that bottom trawling, particularly on seamounts, destroys biodiversity.
- Rejects and condemns lawless acts of piracy against private fishing vessels.

ICFA therefore:

- Recognizes the need for Flag States to manage fishing activities that may affect sensitive marine ecosystems in the high seas.
- Calls for urgent action to establish regional fishery management organizations (RFMOs) in high seas ocean areas, when appropriate. Until these RFMOs are established, all states should begin to develop the means of providing scientific advice upon which measures to protect sensitive habitats and to conserve stocks in those areas should be based.

- Urges nations to engage in appropriate RFMOs that provide for the utilization of demersal fish resources through bottom trawl fishing while ensuring sustainability, and that any significant adverse effects on the aquatic environment are avoided or mitigated.
- Encourages the United Nations General Assembly to seek the technical and scientific advice of the experts from the United Nations Food and Agriculture Organization on issues of bottom trawling on the high seas.
- Urges all nations to continue to reject extreme restrictions, such as proposal for a bottom trawling moratorium on the high seas.



International Coalition of Fisheries Associations

WHALING

2006

Recalling existing resolutions regarding whaling;

ICFA recognizes that:

- The sovereignty, cultural practices, and dietary habits of individual nations and their peoples should be duly respected;
- Conservation and management measures should be implemented based on scientific findings;
- All marine living resources, including whales, should be used sustainably while ensuring the proper conservation and rational use of stocks, as endorsed by Agenda 21 of the 1992 Earth Summit;
- Some whale stocks are abundant and feeding on large amounts of fish and other marine resources which likely impacts sustainable commercial fisheries;
- The International Convention for the Regulation of Whaling explicitly states its purpose as “to provide for the proper conservation of whales stocks and thus make possible the orderly development of the whaling industry”;

ICFA is:

- Deeply concerned about the continuing failure of the IWC to implement the Revised Management Scheme, thereby maintaining the 1982 moratorium on commercial whaling despite the IWC’s Scientific Committee’s development of a risk averse method of calculating catch quotas and advising that a number of stocks could be harvested on a sustainable basis;

- Deeply concerned that the IWC maintains the 1994 Southern Ocean Sanctuary without a recommendation that such measure was required for conservation reasons.

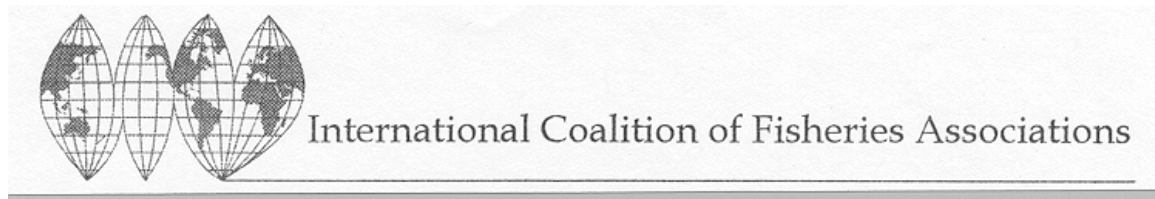
ICFA urges the IWC to:

- Complete and implement the Revised Management Scheme at the earliest opportunity thereby ending the moratorium on commercial whaling;
- Encourage the research on interactions between marine mammals and fishery resources such as that being done by Japan, Norway, Iceland, and Russia.

ICFA:

- Supports St. Kitts and Nevis Declaration adopted in the 58th International Whaling Commission meeting;
- Urges International Whaling Commission members to be seriously engaged in the process of normalization of the IWC;
- Notes the resumption of commercial whaling by Iceland and acknowledges the right of individual nations to determine the appropriateness of whaling.

St Kitts and Nevis Declaration will be attached.



ILLEGAL, UNREGULATED AND UNREPORTED FISHING

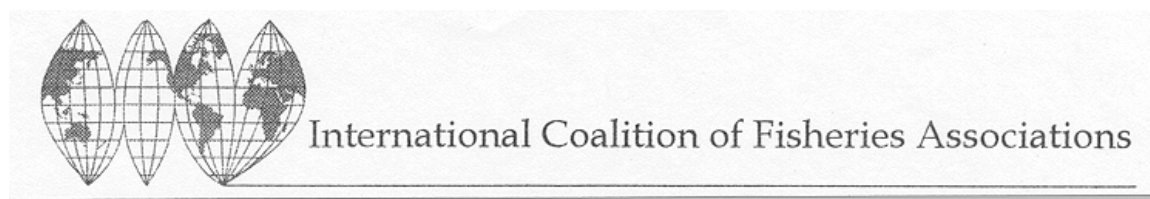
2006

Whereas members of ICFA:

- Are committed to being responsible fishers and to comply with the requirements imposed by our flag states.
- Recognize that non-compliance undermines the rights and viability of compliant fishers.
- Recognize that those who fish under flags of non-compliance operate at significant cost advantages and have no obligation to be responsible fishers.
- Require a “level playing field,” that is, we need governments to take firm action to ensure that non-compliant states and their fishers eliminate flags of convenience and IUU fishing.

In supporting the nondiscriminatory trade measures adopted by countries and by regional fishery management organizations (RFMOs), ICFA therefore:

- Recognizes that the application and full implementation of such measures will result in a significant progress towards the elimination of IUU activities.
- Intends that such measures include those adopted in the Report of the Review Conference on the Agreement for the Implementation of the Provisions of the United Nations Convention on the Law of the Sea of 10 December 1982 relating to the Conservation and Management of Straddling Fish Stocks and Highly Migratory Fish Stocks.



COMMITMENT TO SUSTAINABILITY

2006

Whereas ICFA:

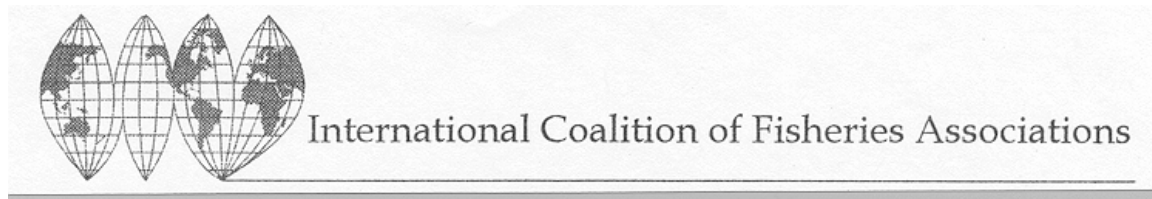
- Notes that governments have a responsibility to manage global fisheries;
- Notes that governments also have a responsibility to communicate success in fisheries management;
- Notes that the vast majority of the globe's fish stocks are sustainably managed;¹
- Notes that the private sector has turned to third party organizations to demonstrate a commitment to source their products from sustainable fisheries;
- Notes that the UN Food and Agriculture Organization has developed Guidelines for Ecolabelling of Products from Marine Capture Fisheries

ICFA:

- Strongly encourages governments to continue to ensure that global fish stocks are sustainably managed;
- Strongly encourages governments to commit more resources to better communicate their success in managing fisheries;
- Urges governments to develop tools to communicate with retailers and restaurants about the status of their fisheries management;

¹ FAO SOFIA 2006 page NN

- Encourages governments to coordinate effectively their fisheries management and the communication of these results;
- Encourages any third party fisheries management certification be consistent with the UN FAO Ecolabelling Guidelines.



**MARINE PROTECTED AREAS
and
SUSTAINABLE MANAGEMENT OF FISH STOCKS**

2006

Whereas ICFA:

- Acknowledges that Marine Protected Areas (MPAs) are a useful tool for protecting marine biodiversity;
- Acknowledges that MPAs are a useful tool for achieving some fisheries management objectives, such as conservation of juvenile fish;

ICFA:

- However, expresses its considerable reservation that MPAs can be practically implemented for the purpose of managing overall fish stock sustainability.
- Believes it unlikely that MPAs would be effective for this purpose unless they led to the closure of much of the geographic range of the target fish stocks. In these circumstances it is equally unlikely that most commercial fisheries could maintain their commercial viability.