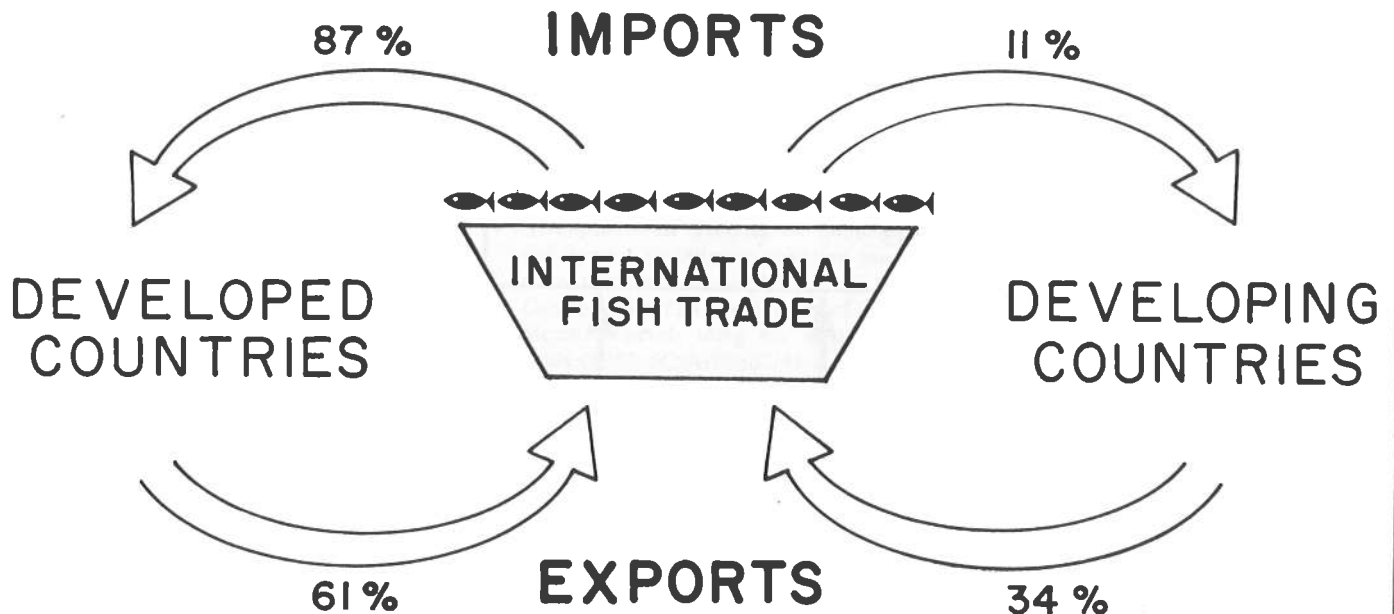


# The Pattern of Fish Trade

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The general pattern in the world food market is that (a) most of the trade is among developed countries, (b) there is little trade among the less-developed countries, and (c) in the trade between the two groups, on balance, food tends to flow from the less-developed to the more highly-developed countries. The same pattern holds with respect to trade in fish products. Developed countries export 61.3% of the total value of fish exported, but they import a larger share, 87.1% of total fish imported. Developing countries export 34.0% of the total value of fish entering into world trade, but they import only 11.0%. Thus the developed countries

take out more than they put into world fish trade. The developing countries take out a smaller share than they put in.

The pattern is evident in Southeast Asia. There is relatively little fish trade among the nations of the region themselves. Imports from outside the region consist primarily of low-valued products such as mackerel, with most of that product coming from Japan. Some high-valued products are imported by relatively highly developed Hong Kong and Singapore. Both are very large consumers of fish on a per capita basis, but this does not entirely account for their imports; both transship fish to other destina-

tions. In the early 1970s the Philippines was a net importer of fish (primarily canned mackerel and sardines from Japan), but it has now established a high positive balance of trade in fisheries products.

While import patterns have been mixed, there has been a clear trend toward increasing fisheries exports from Southeast Asia. Most of that export is going to Japan. In 1978 fishery exports to Japan from the region were valued at over \$400 million, almost half of the region's total exports. The Japanese are also the major buyers of shrimp from Indonesia, Thailand, and Hong Kong. Historically, the United States has not been a major buyer

of fish from Southeast Asia, but recently, with the rapid growth of the Philippine tuna industry, the United States has become a major buyer, importing 60% of the Philippine frozen tuna exports in 1980. The United States has also become the major importer of Philippine canned tuna, taking about \$29.5 million worth in 1980, about 85% of the total exported by the Philippines. Most of the fisheries development in the region is export oriented, with the result that more and more of the product is being shipped to Japan, the United States, and western Europe.

## The Upstream Trade

Georg Borgstrom has argued that: "Outside the area of cereal grains most food and feed of the world market moves

between the well fed and, still more surprisingly, from the hungry to the rich countries."<sup>1</sup>

This pattern certainly holds with respect to fish. For example, in the U.S.A., fish imports have greatly exceeded exports, both by value and by weight, in

every year since 1930. Overall, "the United States alone imports about twice as much fish, primarily in the form of feed for livestock, as do all the poor countries combined."<sup>2</sup>

Japan too has been importing increasingly large quantities of fish; by 1971

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imports exceeded exports in value, and by 1975, in volume also.

Fishery products that may be regarded as substantial food resources from the point of view of the poor may be used as food for pigs or poultry for the rich, or may be used to feed their pets:

"a cheap Moroccan canned fish, developed for the Middle East markets, primarily Egypt, brought a higher price when sold to the United States as cat food."<sup>1</sup>

Fish traded in the international market tends to flow from less developed to more highly developed countries; most countries purchase their fish imports from countries which are poorer (in terms of gross national product per capita) than those to which they send their fish exports.

**Thus, fish continue to migrate after they are caught. They tend to move from the more needy to the less needy.**

There is a widespread and very commonsensical view that countries should export food only when, and only because, their domestic needs are satisfied. Although this seems logical, often it does not happen. Many nations meet the market demands of others before they meet the needs of their own. For many such countries, fish is the major source of animal protein.

About 25,000 tonnes of fish were exported from the famine-stricken Sahel region of Africa in 1971 alone. Many poor countries export food despite serious domestic malnutrition. In Thailand, Malaysia and the Philippines, seafood exports have expanded sharply while local consumption has declined. In Malaysia, the quantity of fish available per person in 1975 was 30% lower than the 1967 level, despite the fact that the total catch increased substantially. Most of the increase in production has been exported.

Years ago Borgstrom<sup>1</sup> commented:

"No doubt everyone realizes how preposterous it is that the two most protein-needy continents, Africa and South America, are the main suppliers of the largest quantities of animal protein feed moving in the world trade—and they provide those who already have plenty... The Peruvian catches alone would suffice to raise the nutritional standard with respect to protein for the undernourished on the entire South American continent to southern

European level. The amount of protein extracted (1966-68) exceeds by one half the meat protein produced in South America and is three times the milk protein raised. The corresponding fish meal coming from Africa would be enough to reduce by at least 50% the present protein shortage of that continent."

The situation remains much the same, with poor countries still in the supplier role. In the Pacific region, the islands are described in magazine articles with titles like "Solomons Fish for Europe," "The Pacific Becomes a Pantry for Japan," and Asean is described as "becoming a vegetable plot and fishpond for the developed world."



### Is There a Problem?

On balance there is a net flow of fish from poor countries to rich countries. But why should this be viewed as problematic? The rich countries do pay for the fish they import. Obviously, both sides benefit from the transactions, for otherwise either could simply refuse to participate.

There are three major concerns, all of which require further research: (i) In the fisheries trade, as in other kinds of trade, the richer trading partners are likely to get a larger share of benefits than the poorer trading partners. (ii) The foreign exchange that is earned from the export of fisheries products from poor countries may not be well used, failing to benefit local consumers who are no longer supplied with inexpensive locally produced fish. (iii) In a world in which there are more than 500 million significantly malnourished people, it simply does not make sense to export major food supplies away from those who do not have enough.

To see what is problematic about the upstream trade in fish we need to go beyond the merely economic and acknowledge that it is important to fulfill needs as well as to meet market demand.



### Remedies

What should be done? To the extent that fisheries development is motivated by concern for problems of local under-

nutrition, more attention should be devoted to the development of subsistence fishing. "Give a man a fish, and you feed him for a day; teach him how to fish, and you feed him for a lifetime." No one can siphon benefits away from people who produce for their own consumption.

Also, an increasing share of the international trade in fish that is undertaken should be among poor countries themselves. INFOFISH, headquartered in Kuala Lumpur, provides marketing information and advisory services for fish products in the Asia/Pacific region. INFOFISH and other fisheries agencies could devote more effort to promoting fisheries trade among poor countries.

Another remedy is simply to reduce international fish trade altogether. Many poor countries which export fish to rich countries also import substantial quantities of lower grade fish for domestic consumption. Programs of import substitution could be undertaken to increase the food self sufficiency of poor countries. Increasingly, local production should be for local consumption.

Increasing self sufficiency among developed countries would help as well. Rich countries could help poor countries to become more self sufficient by increasing their own self sufficiency—that is, by reducing the amount of food they import.

There are several plausible strategies for dealing with the systematic flow of fish and other foods from the poor to the rich, but all have a common prerequisite: there should be a clear understanding that this is in fact a problematic situation, one which needs to be remedied. That is, it needs to be recognized that while trade can be beneficial to all trading partners, it is likely to be much more beneficial to the richer partners. If it is not pursued carefully, increasing trade can promote the widening of the gap between rich and poor. ●

<sup>1</sup>Borgstrom, G. 1969. Too many: a study of earth's biological limitations. Macmillan Publishing Co., New York.

<sup>2</sup>Simon, A. 1975. Bread for the world. Paulist Press, New York.