



Developments in fish safety and quality

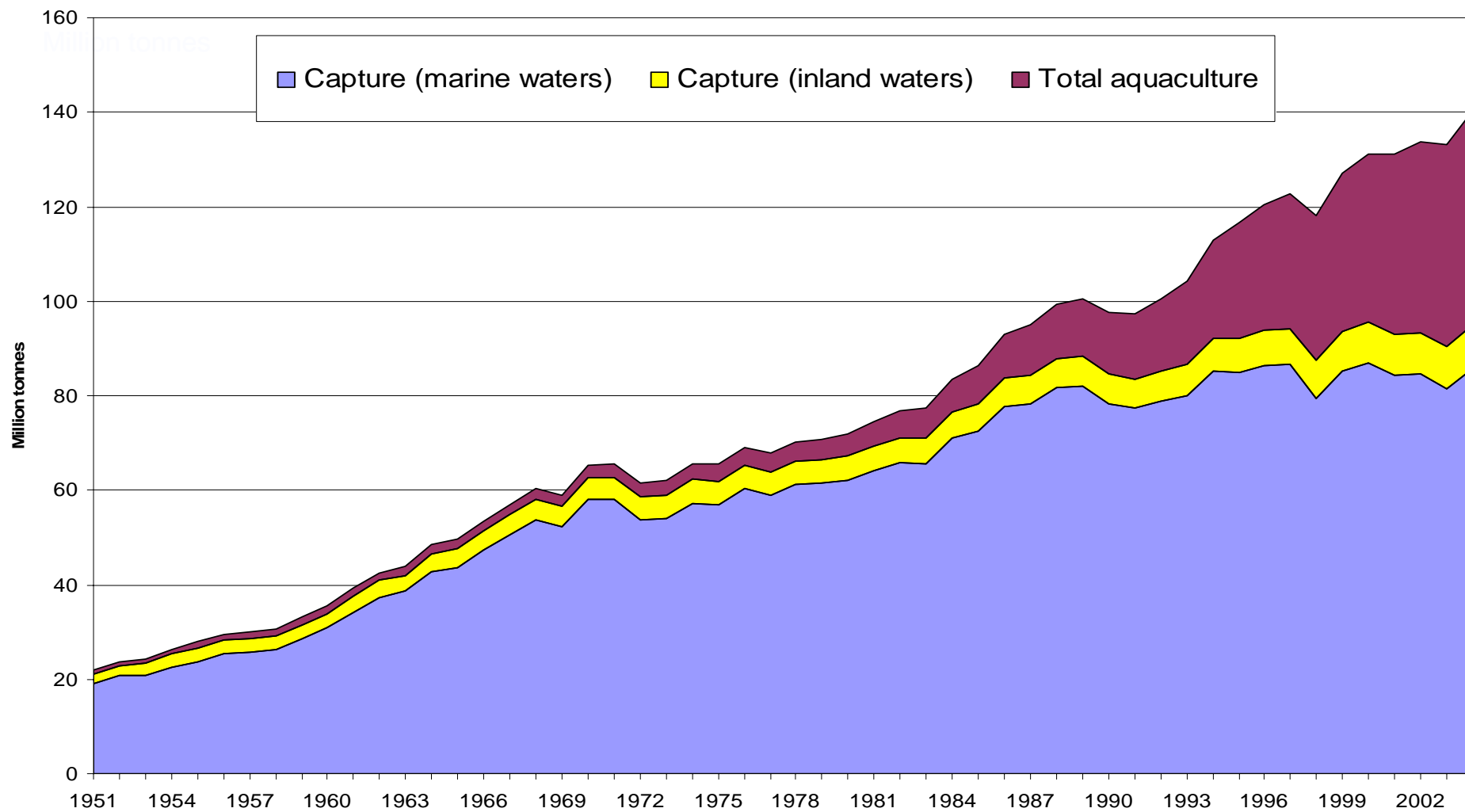
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**Punta Del Este, Uruguay
27 November 2006**

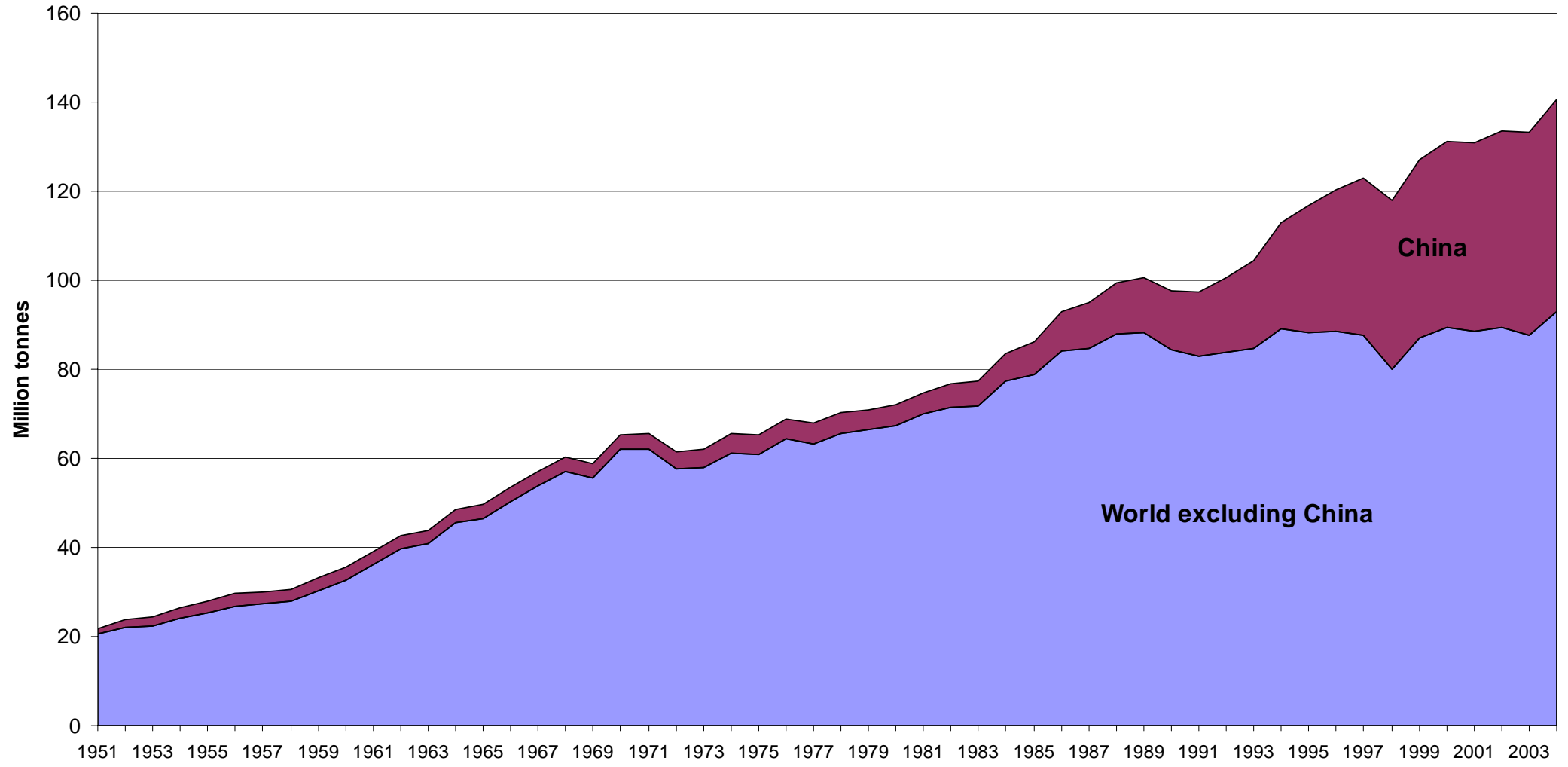


Fisheries production (1951-2004)

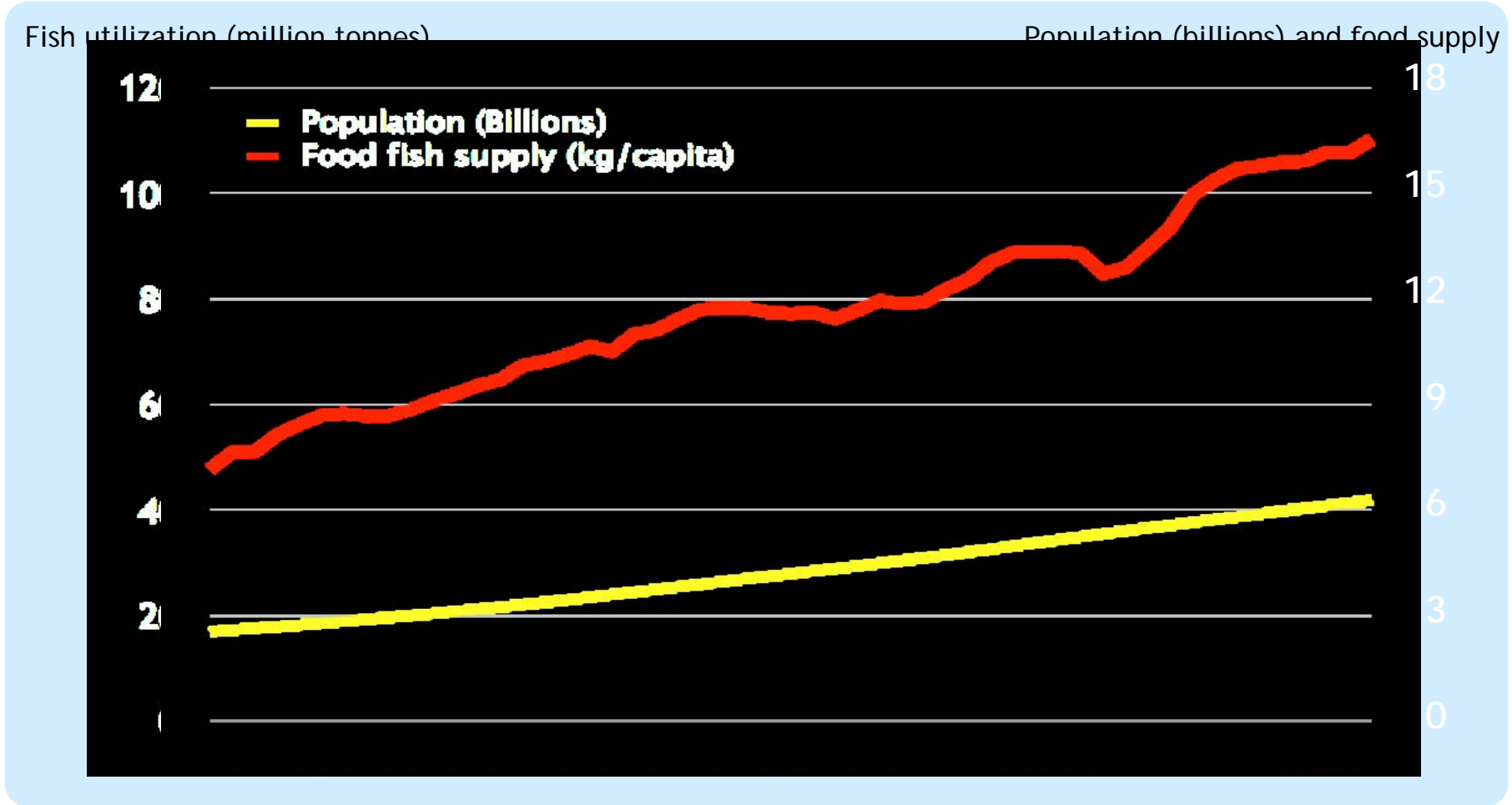




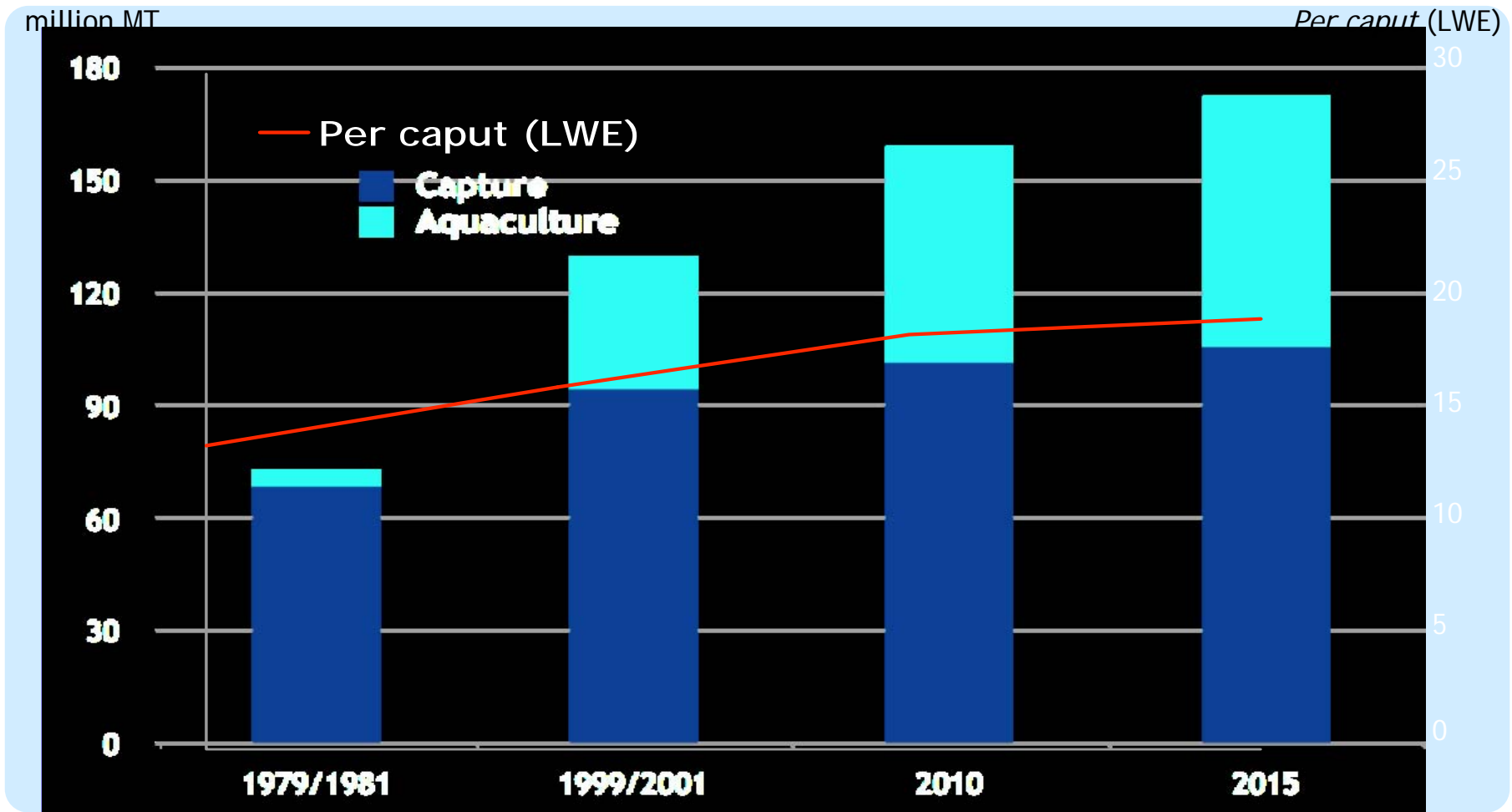
Fishery production (1951-2004)



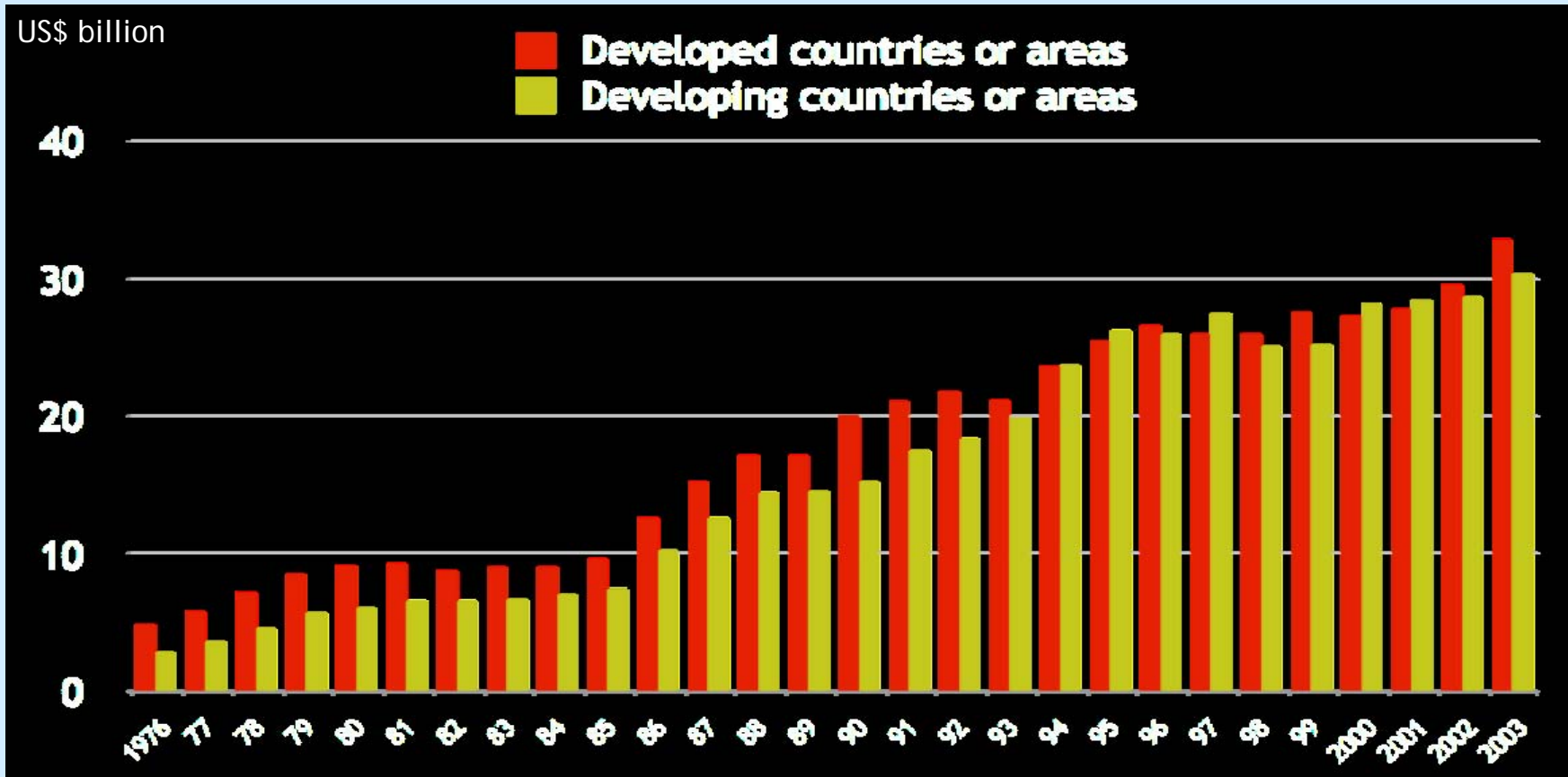
Utilization & supply (1951-2003)



Projections: Fish supply and consumption (until 2015)



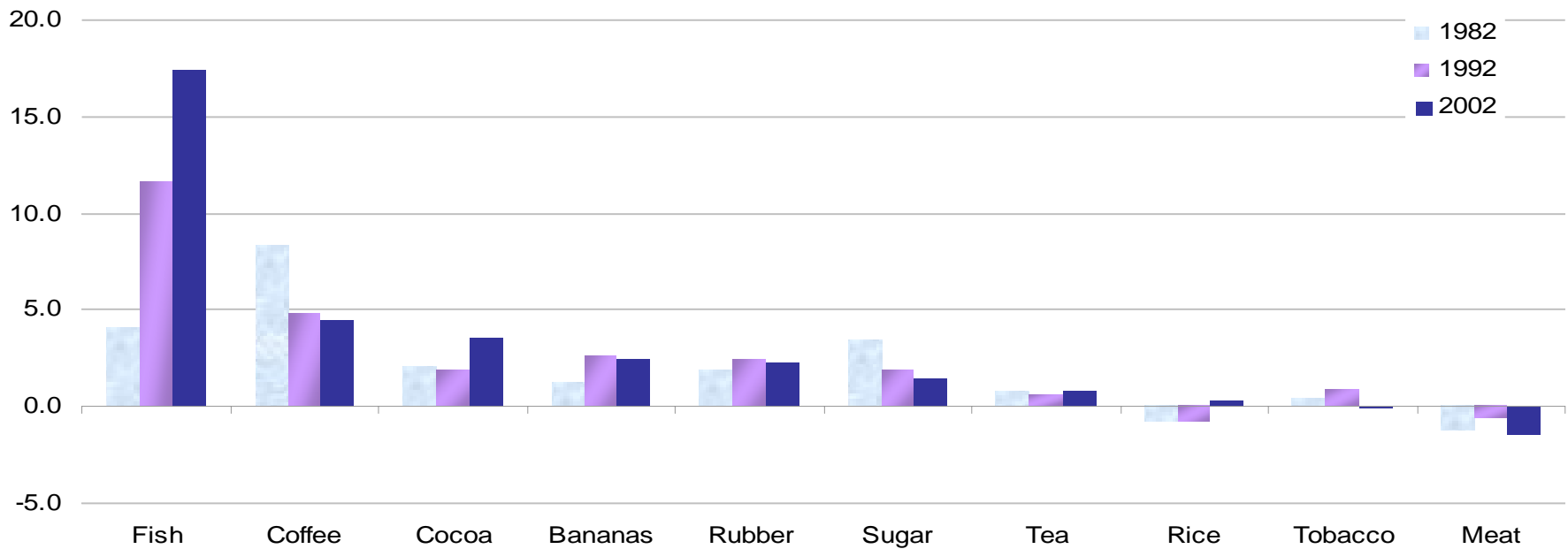
Fish exports (1976-2003)



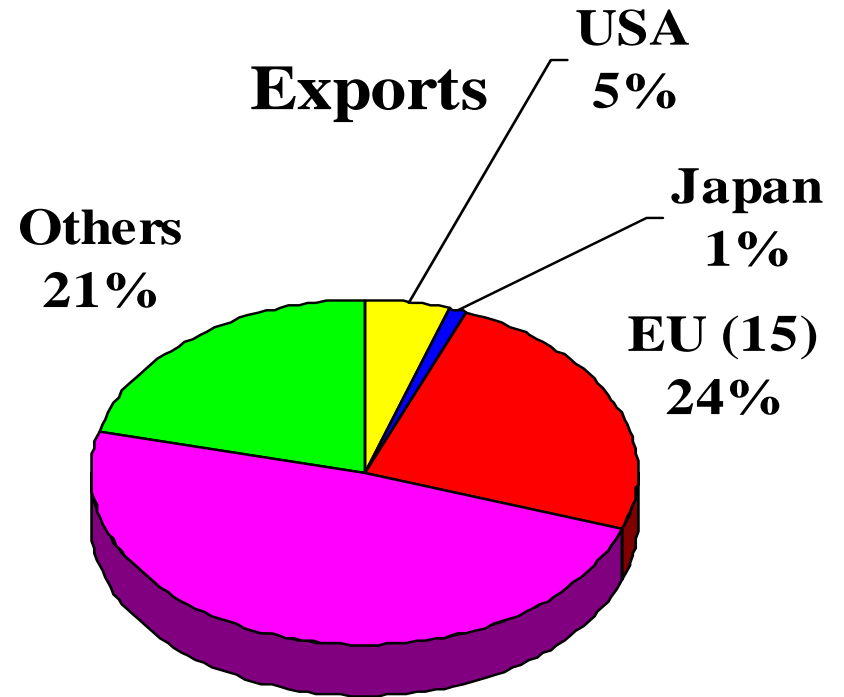
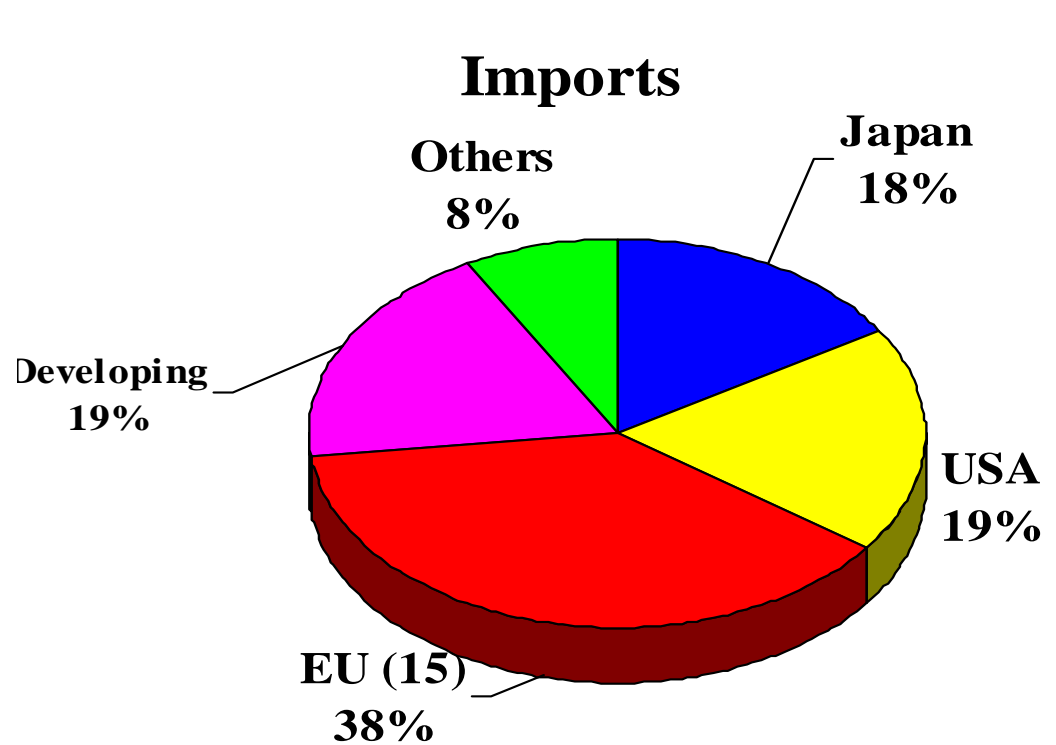


Net exports of selected agricultural commodities by developing countries

US\$ billions



International trade(2004)





World trade Organization SPS/TBT agreements

Issue:

- **Liberalization of trade**
- **Maximal protection of plant, animal and human health**
- **Minimal Technical Obstacles to trade**



World Trade organization SPS/TBT Agreements

Scope:

- **Consumer protection**
- **Animal and plant protection**
- **Fair trade practices**



SPS/TBT Agreements

Protection

vs.

Protectionism

- **Necessary to achieve an ALOP but SPS and technical standards should not be used to shield domestic producers from foreign competition**
 - **Pressure to do so is high as other trade barriers (tariffs and quotas) are reduced**
- **SPS measures and technical standards are complex which makes them particularly deceptive and difficult to challenge**



SPS/TBT Agreements

SPS

vs.

TBT

- SPS cover health (human, animal and plant) protection measures
- The TBT Agreement covers all technical requirements, voluntary standards and the procedures (Conformity assessment procedures) to ensure that these are met, except when these are SPS measures as defined by the SPS Agreement
- TBT measures can cover any subject related to industrial goods, from car safety to energy –saving devices to food packaging



Technical Barriers to Trade Agreement (TBT)

- **Revised Agreement from Tokyo Round (1973-1979)**
- **Purpose of Agreement:**
 - To encourage the development and use of international standards and conformity assessment systems
 - To prevent the use of technical requirements as unjustifiable trade barriers
 - To prevent deceptive trade practices
- **Product (1979) vs. product, process and production methods (1995)**
- **SPS measures for agriculture and foods dealt with separately under SPS**



SPS/TBT Agreements

General Principles

- **Sovereignty**
- **Harmonization**
- **Equivalency**
- **Scientific basis**
- **Transparency**
- **Technical Assistance**
- **Special and differential treatment**
- **Consultation and dispute settlement**



The food chain approach

- **Prevention at Source**
- **Risk Analysis**
- **Harmonization**
- **Equivalence**
- **Traceability**

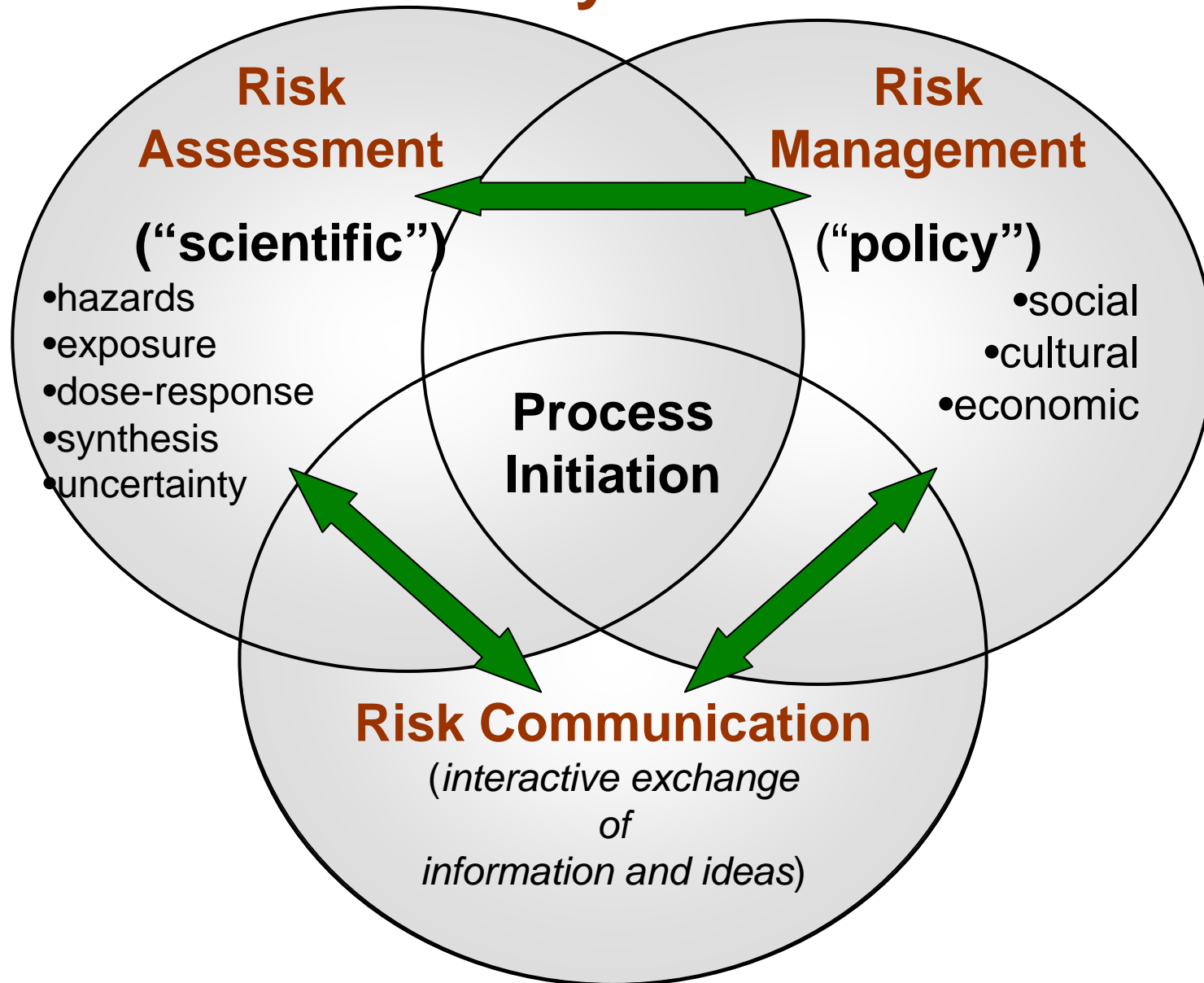


Prevention at source

- **Producers and processors are responsible for fish safety and quality along the food chain using preventive systems (GAP, GHP, HACCP)**
- **Control authorities provide regulatory framework, verify that producers and processors apply properly preventive systems**
- **Harmonization and Equivalence (e.g. EU List 1, US importers' responsibility)**





The Risk Analysis Process

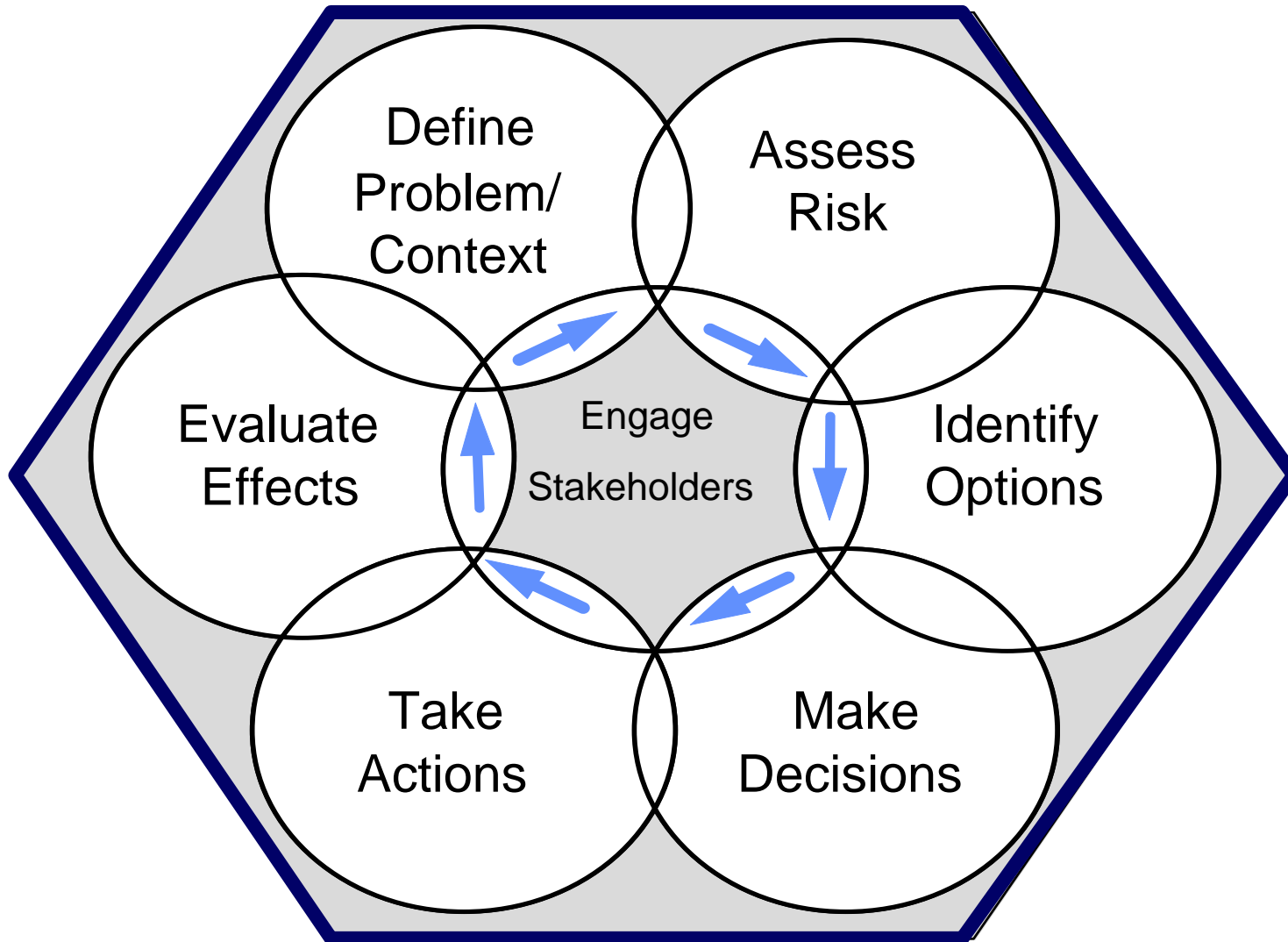




How do “experts” and consumers rate risks?

Actual Risk	Risk Factor	Perceived Risk
HIGH	microbiological contamination	LOW
	packaging failure	
	distribution failure	
	pesticide residues	
	biotechnology	
	food additives	
LOW	food irradiation	HIGH

The risk analysis process





Achievements and Challenges

- Harmonization

- Equivalence

- Scientific basis

- Special and differential treatment/
Technical assistance

Achievements:

- HACCP-based systems widely accepted
- Codex Alimentarius Commission, OIE accepted as international standards setting bodies

Shortcomings:

- Different inspection and control schemes
- Different fish standards applied
- High rates of detentions/rejections



Achievements and Challenges

■ Harmonization

■ **Equivalence**

■ Scientific
basis

■ Special and
differential
treatment/
Technical
assistance

Achievements:

- “Food chain” and “Control at source” approaches
- Cost-effectiveness of these approaches

Shortcomings:

- Very few agreements
- Obligation of means vs. obligation of results



Achievements and Challenges

- Harmonization

- Equivalence

- **Scientific basis**

- Special and differential treatment/
Technical assistance

Achievements:

- Risk analysis widely accepted
- National and International work undertaken

Shortcomings:

- Needs exceed by far activities undertaken
- Lack of resources in developing countries
- Many standards not scientifically based



Achievements and Challenges

■ Harmonization

■ Equivalence

■ Scientific basis

■ Special and differential treatment/
Technical assistance

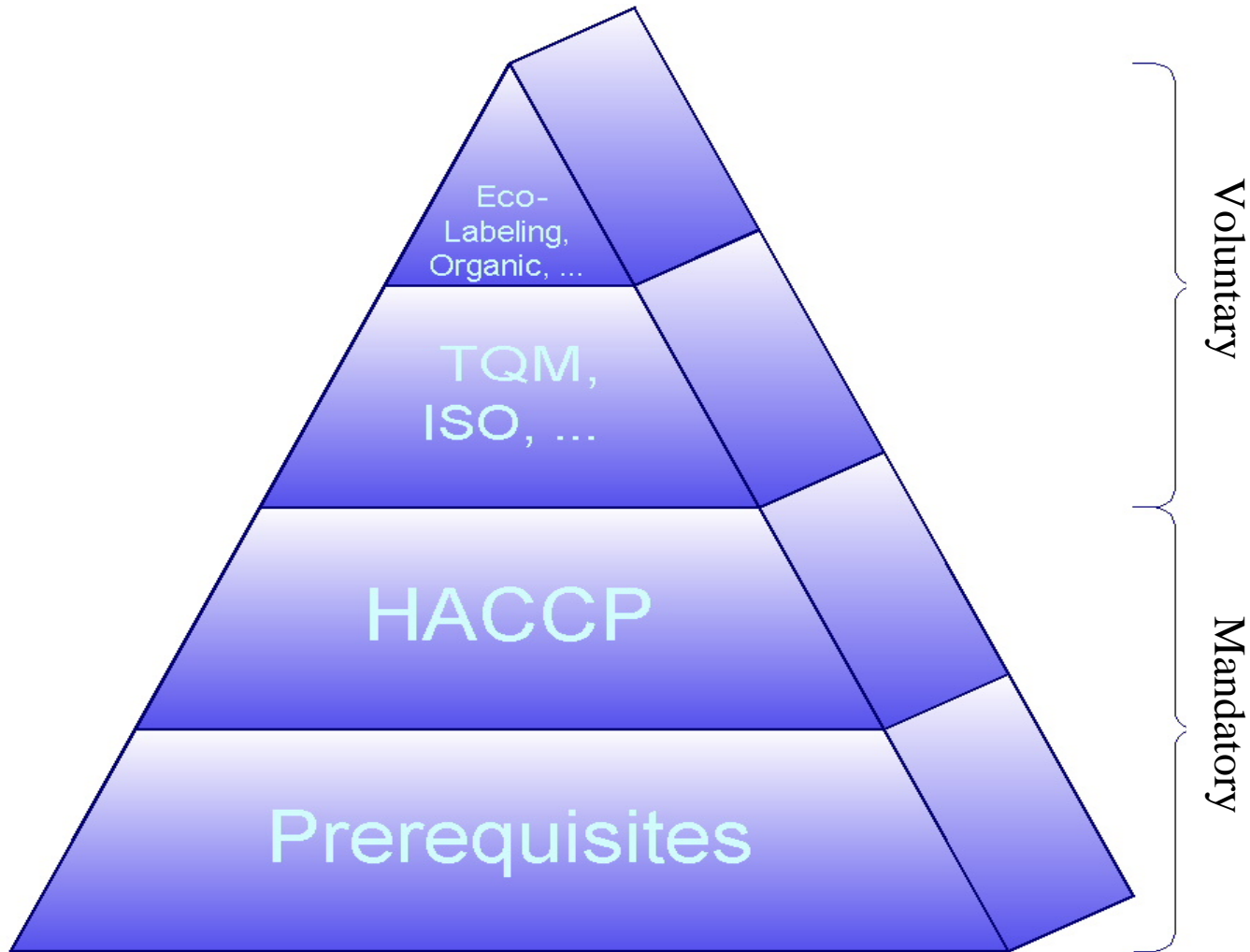
Achievements:

- Regional and national initiatives (SIDA, EC-ACP, other initiatives)
- STDF (Standard and Trade Development Fund)
- Trust Fund for CAC

Shortcomings:

- Developing countries obliged to meet market requirements
- Needs exceed by far initiatives
- Lack of resources in developing countries
- Many standards not scientifically based

Implications for the Fish Industry





Development of B2B and other Market driven standards

Scope:

- **Safety and quality (GFSI, BRC)**
- **Environmental (Eco-labeling)**
- **Social protection**
- **Aquaculture**



Main Reasons for the development of private standards

- Consolidation in the food industry (e.g., processing, retail)
- Emergence of coalitions (GFSI, BRC)
- “Supermarketization”, including in developing countries
- Increasing influence of civil society and consumer advocacy groups
- Increasing role of retailers as the last link between suppliers and consumers. The use of B2B standards to protect reputations
- Special case of aquaculture (GAA, ACC, EUREP GAP)



Implications

- Additional burden for Small scale businesses and developing countries
- Risk of anti-competitive behaviour
- Definition of boundaries between private and public sectors. Who is responsible for what?
- Competing certifying schemes confuse consumers as to the value of the process



Traceability

- Traceability is the ability to trace the history, application or location of any entity by means of recorded identifications
- EU: the ability to trace and follow a food, feed, food-producing animal or substance intended to be, or expected to be incorporated into a food or feed, through all stages of production, processing and distribution



Objectives

- **Improve safety (product recall)**
- **Transparency,**
- **Consumer confidence,**
- **Efficiency and cost effectiveness**
- **Regulatory & Market driven demand**



Traceability

- **Where was the fish harvested?**
- **When was it harvested?**
- **How was it produced? (wild vs. aquaculture, GAP)**
- **How has it been processed? (GMP)**
- **Safety control systems? (GHP, HACCP)**
- **Labeling claims (Eco-labeling, organic, nutritional, health, COOL...)**
- **Market driven, regulators, trade partners, IUU,...**