

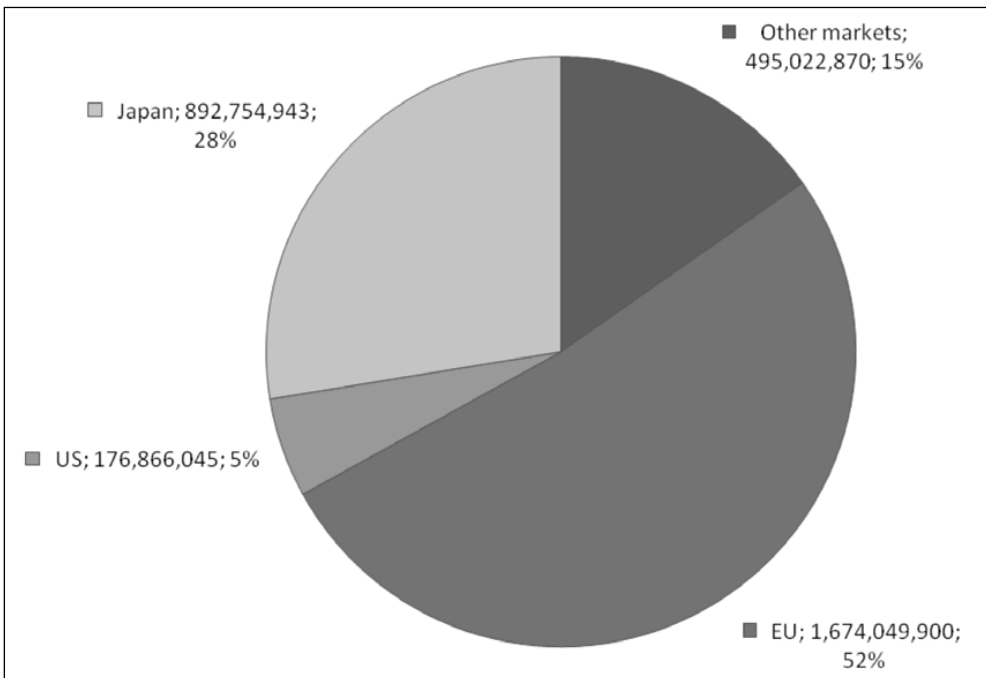
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ACP Trade with Other Markets

This chapter analyses trends in ACP exports of fisheries products to the USA and Japan, and has been included in order to identify the potential of US and Japanese markets to compensate for downward trends in the export of ACP fisheries products to the EC.

Together with the EC, the USA and Japan make up the three major export markets for fisheries products worldwide. The importance of these markets relative to other destinations of ACP exports is illustrated in Figures 6.1 and 6.2. Figure 6.1 presents the value of ACP fisheries exports to the EC, USA and Japan relative to the total value of ACP fisheries exports worldwide in 1995.

Figure 6.1. Destination of ACP fisheries exports (US\$), 1995

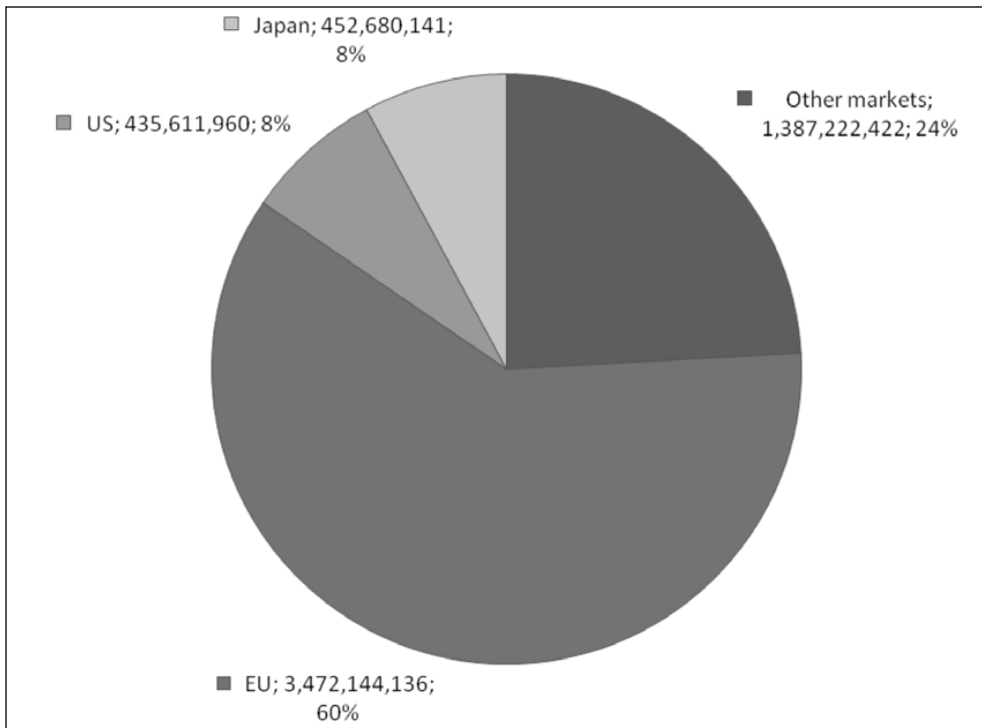


Source: UN Commodity Trade Statistics Database, available at <http://comtrade.un.org>. Data relate to the same HS product categories used in relation to the ACP-EC export data discussed in chapter 5 of this report: HS0301 live fish, HS0302 fresh or chilled fish, HS0303 frozen fish, HS0304 fish fillets, HS0305 preserved fish, HS0306 crustaceans, HS0307 molluscs, HS1604 prepared or preserved fish, HS1605 prepared or preserved molluscs or crustaceans.

Figure 6.2 presents the value of ACP fisheries exports to the EC, USA and Japan relative to the total value of ACP fisheries exports worldwide in 2006.

As shown in Figure 6.1, approximately 85 per cent of ACP fisheries exports in 1995 were imported by either the EC, USA or Japan. This combined share of ACP fisheries exports fell to approximately 76 per cent in 2006, although the market share of exports to both the EC and USA increased in relative terms.

Figure 6.2. Destination of ACP fisheries exports (US\$), 2006



Source: UN Commodity Trade Statistics Database, available at <http://comtrade.un.org>. Data relate to the same HS product categories used in relation to the ACP-EC export data discussed in chapter 5 of this report: HS0301 live fish, HS0302 fresh or chilled fish, HS0303 frozen fish, HS0304 fish fillets, HS0305 preserved fish, HS0306 crustaceans, HS0307 molluscs, HS1604 prepared or preserved fish, HS1605 prepared or preserved molluscs or crustaceans.

6.1 Market composition

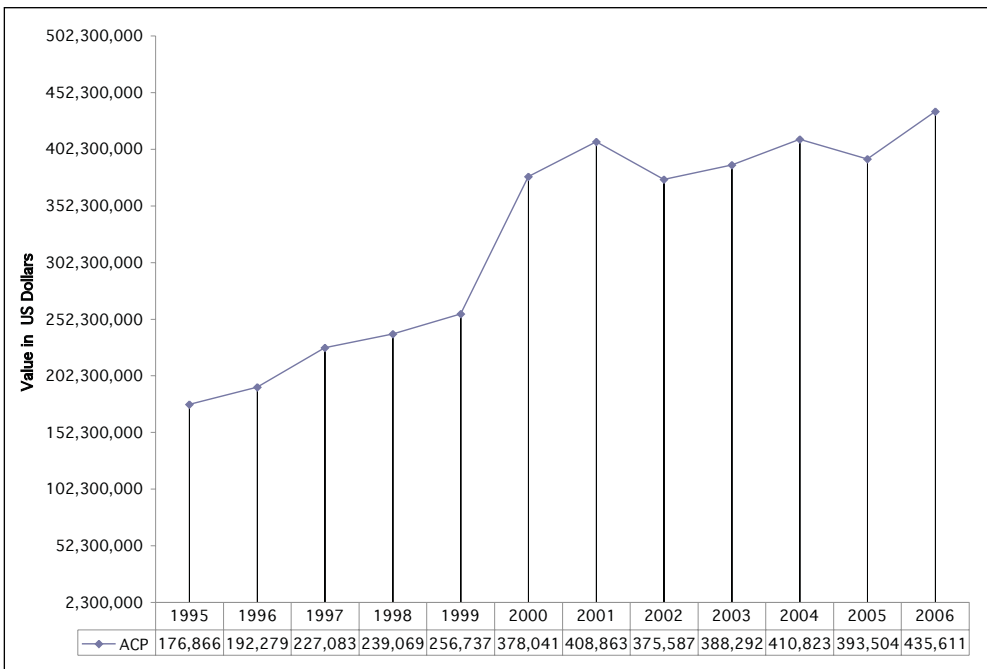
ACP exports to the EC and USA are very similar in composition. The top five fishery commodities exported to these two markets are HS0306 (crustaceans), HS1604 (prepared fish), HS0303 (frozen fish), HS0304 (fish fillets) and HS0302 (fresh or chilled fish). While most of these commodities are also exported to Japan, the Japanese market is slightly different. HS1604 (prepared or preserved fish) is the commodity which is most

traded by the ACP member states to the EC and USA in terms of value, while such exports to Japan are insignificant. On the other hand, HS0307 (molluscs) is the most traded product to Japan from ACP member states in terms of value, but this is not a significant export to the EC and USA.

6.2 USA⁸⁹

Figure 6.3 presents the aggregate trends of exports by ACP states of fisheries products to the USA for 1998–2007. Data relate to the same HS product categories used in relation to the ACP-EC export data discussed in chapter 5.⁹⁰

Figure 6.3. ACP fisheries exports to the USA (US\$ '000), 1998–2007



Source: UN Commodity Trade Statistics Database, available at <http://comtrade.un.org>

The value of trade between the ACP states and the USA shows an overall increase from approximately US\$176.8 million in 1995 to US\$435.6 million in 2007. Fisheries products are imported from the ACP states to the USA in various forms, with tuna as the most traded species. The African ACP states which have the highest exports of fish and fishery to the USA are Kenya, Mauritius, Tanzania, South Africa and Namibia. The main Caribbean ACP exporters to the USA are The Bahamas, Belize, Guyana, Jamaica, Suriname, and Trinidad and Tobago, while the top exporters from the Pacific ACP are Fiji Islands, Solomon Islands, Papua New Guinea, Tonga and Samoa.

In terms of product nomenclature, the fish exports of Africa ACP member states to the USA mostly comprise HS0306 (crustaceans), HS0304 (fish fillets) and HS1604 (prepared or preserved fish). Similar fishery products are exported by Caribbean ACP member states, with the addition of HS0302 (fresh or chilled fish), which is the second highest export to the USA with a value of about US\$48 million in 2007. Pacific ACP member states mostly trade HS0302 (fresh or chilled fish) and HS1604 (prepared or preserved fish) fisheries products.

The ACP fisheries exports to the USA remain a small proportion compared to those from other sources, particularly south-east Asia. The value of south-east Asian fisheries exports to the USA was about US\$3.82 billion in 2007. This has increased from US\$2.04 billion in 1998. The species that are most exported to the USA from south-east Asia are shrimp and tuna. South-east Asia captures the US shrimp market, with exports worth approximately US\$2.3 billion in 2007, compared to US\$48.8 million for the ACP member states. South-east Asia also has a higher export of tuna and tuna products to the USA, valued at US\$522.08 million in 2007, compared to US\$157.7 million for the ACP member states.

ACP member states directly compete with south-east Asia in the US market for HS306 (crustaceans), HS1604 (prepared fish), HS0304 (fish fillets), HS0303 (frozen fish), and HS0307 (molluscs), although the exports of the latter are significantly higher. South-east Asia also dominates the US market for HS1605 (prepared or preserved molluscs or crustaceans). Furthermore, the value of south-east Asian exports of HS306 (crustaceans) and HS1604 (prepared or preserved fish) is 90 per cent greater than the value of ACP exports of the same commodities to the USA. It is only in HS0302 (fresh or chilled fish) that ACP member states have higher exports (in value terms) to the USA compared to those from south-east Asia.

The trend in the trade of commodities from ACP member states and south-east Asia to the USA suggests that south-east Asia has a significant advantage in terms of exporting processed fish. This also highlights the lack of post-harvest technology in ACP member states compared to south-east Asia. These factors highlight the dependence of ACP fisheries exports on the EC market, where ACP member states enjoy a greater share of the regional market in addition to more favourable trade preference and bilateral access arrangements. As will be elaborated in Part B, the ACP share of the EC fisheries market may be negatively impacted by the adoption of additional and more stringent fisheries regulations, which tend to have an impact similar to that of a technical barrier to trade.

6.3 Japan⁹¹

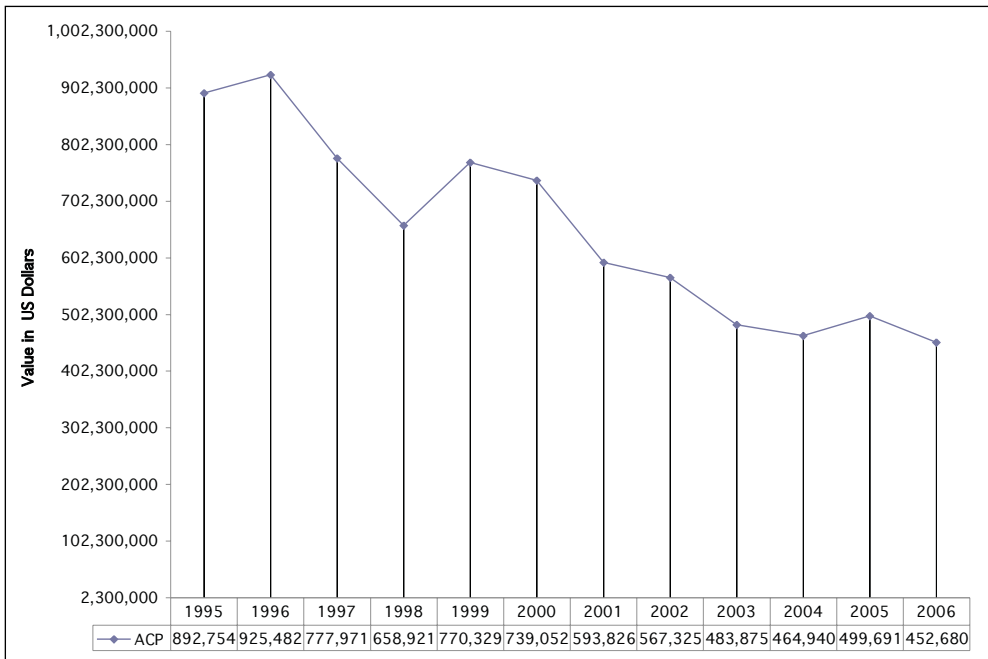
Figure 6.4 presents the aggregate trends of exports by ACP states of fisheries products to Japan for the period 1996–2006. Data relate to the same HS product categories used in relation to the ACP-EC export data discussed in chapter 5.⁹²

The value of exports from ACP member states to Japan of all types of fish and fisheries products shows an overall continuous fall from approximately US\$925 million in

1996 to US\$453 million in 2006. The most common fishery products exported by the ACP to Japan are HS0302 (fresh or chilled fish), HS0303 (frozen fish), HS0304 (fish fillets), HS0306 (crustaceans) and HS0307 (molluscs). ACP exports to Japan show a general decline for all fisheries products except for HS0301 (live fish) and HS0304 (fish fillets). ACP exports of HS0301 to Japan have increased from US\$453,655 in 1996 to US\$1.2 million in 2006. ACP exports of HS0304 have also increased from US\$27.29 million in 1996 to US\$47.69 million in 2006.

The ACP-Japan trade data do not present a very promising trend in fisheries exports for the ACP member states compared to the Asian suppliers whose exports to Japan have remained stable during the period 1996–2006. The value of ACP fisheries exports to Japan is considerably smaller, estimated at only 0.04 per cent of the total value of Japanese imports. Exports of ACP fisheries products to Japan were valued at US\$443.5 million in 2006 compared to US\$5.17 billion for those from Asia. Like ACP fisheries exports to the USA, the trend in the trade of fisheries products to Japan highlights the dependence of ACP fisheries exports on the EC market. Section 11.2 elaborates on the implications of the lack of alternative regional markets for ACP exports, in addition to the impact of regional and global regulations against IUU fishing.

Figure 6.4. ACP fisheries exports to Japan (US\$ '000), 1996–2006



Source: UN Commodity Trade Statistics Database. Available at <http://comtrade.un.org>