How has the Covid-19 pandemic affected Blue Economy in the Black Sea region?
The fisheries & aquaculture sector: challenges and potential response actions

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ICBSS – BSEC – DGMARE workshop
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THE TWO PILLARS OF BLUE ECONOMY

What do fisheries and aquaculture represent for the Black Sea and what is the role of the GFCM?

Fisheries play an important social and economic role in the Black Sea, and the small-scale fleet dominates activities. BlackSea4Fish works with national fisheries institutes across the region to strengthen the sector’s long-term social and environmental sustainability.

The Black Sea fleet

- **11,539 VESSELS**
- **91% SMALL-SCALE FISHERIES**
- **USD 350 MILLION TOTAL REVENUE**
- **49% FROM SMALL-SCALE FISHERIES**
- **20,768 PEOPLE EMPLOYED ONBOARD**
- **74% SMALL-SCALE FISHERIES**
- **390,000 TONNES (2016)**

**THE EU**
The EU is also involved in BS4F activities.

**ROMANIA**
- National Institute for Marine Research and Development Cernavoda

**UKRAINE**
- State Agency of Fisheries of Ukraine
- YUGNIRO Odessa

**RUSSIAN FEDERATION**
- AZNIIRRIH
- Rostov-on-Don

**BULGARIA**
- Executive Agency for Fisheries and Aquaculture Burgas

**TURKEY**
- General Directorate of Fisheries and Aquaculture
- TURKISH TRABZON

**GEORGIA**
- National Environmental Agency Batumi
- IFRE and IO-BAS Varna

Food and high quality protein for an increasing population

Employment for men, women and young people

Essential part of the fabric of coastal communities
GFCM & the crucial role of international cooperation

**GFCM OBJECTIVES:**
- Conservation and sustainable use of living marine resources
- Sustainable development of aquaculture

**BS4F: a cooperative mechanism among scientists within the GFCM**
- Increase scientific knowledge
- SSF
- Assess IUU
- Fisheries and environment
- Technical and institutional cooperation
- Subregional technical unit in Bulgaria

**Liaising with regional bodies and organizations:**
- Black Sea Advisory Council
- Black Sea Economic Cooperation
- Black Sea Commission
- EuroFish
### The impact of Covid-19 on fisheries and aquaculture

<table>
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<tr>
<th>Impact</th>
<th>Contributing factors</th>
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<tr>
<td><strong>Fleet and Farms</strong></td>
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<tr>
<td>- Up to <strong>80% decrease in number of vessels operating</strong>  &lt;br&gt; - Aquaculture farm operations vary greatly</td>
<td>Physical restrictions &lt;br&gt; - Difficulty in complying with social distancing restrictions (particularly on board SSF) &lt;br&gt; - Border closures preventing the transport of product (closure of export markets)</td>
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<td><strong>Production</strong></td>
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<td>- More than <strong>75% decrease in production</strong> in most countries  &lt;br&gt; - Change in target species (away from higher-value species destined to export markets, towards lower value species destined to local markets)</td>
<td>Major changes in demand: &lt;br&gt; - <strong>Closure of Ho.Re.Ca sector</strong> &lt;br&gt; - <strong>Changes in consumer preferences</strong> towards cheaper/canned products &lt;br&gt; - temporary <strong>over-availability</strong> of fresh fish leading to <strong>wastage</strong></td>
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<td><strong>Market</strong></td>
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<td>- An initial <strong>20-70% decline in prices</strong> (e.g. 50% decrease in price for turbot and John dory in Bulgaria)  &lt;br&gt; - Decline in prices for capture fisheries has had effect of decreasing ex-farm prices in some cases  &lt;br&gt; - <strong>30-40% decline in aquaculture farm revenue</strong>  &lt;br&gt; - Certain species more acutely affected (e.g. shellfish, seabass and sea bream) due to restaurant closures</td>
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# The impact of Covid-19 on fisheries and aquaculture

## Measures taken

### Health and safety
- Closing ports and/or quarantining foreign vessels
- **Closure of open-air fish markets**
- Disinfecting ports and fishing boats
- Providing masks for workers
- Raising awareness among fishers and aquaculture farmers about *sanitary measures* (e.g. washing hands and ensuring social distancing on board).

### Market
- Measures to ensuring the continuity of food supply
- Expansion of **home delivery and direct sales**
- Support to national and local production through **consumer awareness campaigns**

### Mitigation of economic impacts
- **Social protection** measures, including:
  - Social assistance (e.g. **cash transfers**)
  - Social insurance (e.g. **health insurance**)
  - Labour market programmes (e.g. **unemployment benefits**)
- Enhanced **investment** in the fisheries and aquaculture sectors

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The sector has recovered somewhat since this initial phase: but effects are ongoing and continue to evolve.
Success stories

Increase in funding

- **BlackSea4Fish project** is providing crucial support to countries to perform the technical work needed to fulfil the requirements of recommendations (e.g. Rapa whelk research programme)

- **Turbot multiannual management plan** with the establishment of a whole-of-Black Sea Total Allowable Catch and a mechanism to determine country quotas

- **Aquaculture Demonstration Centres**
  - raise the awareness on the aquaculture potentials in BS
  - useful tool for administrations to assess new projects
  - consider the different levels of development, conditions and expertise in different countries
Key messages

• Covid-19 represents an acute shock which tested the resilience of the fisheries and aquaculture sector: underlined strengths and weak points for ensuring a resilient sector

• How to equip the sector to be more resilient in the face of future shocks? (e.g. continued effects of Covid-19, climate change, etc.)

• Need for better management and more attention to social issues, also underlined by SOFIA 2020

• Double down on key areas of work:
  • Sustainable fisheries management
  • Strengthening cooperatives and engaging stakeholders in decision-making
  • Market innovations, including direct selling
  • Social protection to reduce vulnerability and ensure capacity to respond to future shocks
Thank you for your attention

For more information:
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