UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMEN

Overview of Economic and Trade Aspects of Fisheries and Seafood Sectors in Costa Rica © 2019, United Nations Conference on Trade and Development

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## **Abbreviations**

AIDCP	Agreement on the International Dolphin Conservation Program
CARICOM	Caribbean Community
CENADA	National Center for Food Supply and Distribution
CITES	Convention on International Trade in Endangered Species of Wild Fauna and Flora
COMEX	Ministry of Foreign Trade
EEZ	Exclusive economic zone
EFTA	European Free Trade Association
FAO	Food and Agricultural Organization of the United Nations
IACTT	Inter-American Tropical Tuna Commission
INCOPESCA	Fishing and Aquaculture Institute
IPP-MAN	Manufacture producer price index
LDCs	Least Developed Countries
MAG	Ministry of Agriculture and Livestock
MINAE	Ministry of Environment and Energy
MSC	Marine Stewardship Council
OECD	Organisation for Economic Co-operation and Development
OETS	Oceans Economy and Trade Strategies
PROCOMER	Export Promotion Agency of Costa Rica
PCI	Product Complexity Index
RSA	Tuna Tracking Record
SIDS	Small Island Developing States
SINAC	National System of Conservation Areas
UNCLOS	United Nations Convention on the Law of the Sea
UNCTAD	United Nations Conference on Trade and Development
UNDOALOS	United Nations Office of Legal Affairs Division for Ocean Affairs and the Law of the Sea
UNDP	United Nations Development Programme
UNFSA	United Nations Fish Stock Agreement
WTO	World Trade Organization

#### Note

Reference to "dollar" and "\$" indicate United States dollars, unless otherwise stated. Reference to "tons" indicates metric tons, unless otherwise stated. Reference to product codes relate to the Harmonized System Nomenclature 2012 edition, unless otherwise stated. Reference to "fisheries" in this document only indicates the sum of all fishing activities whether annually or seasonally (on tuna, all marine fish [except tuna] and crustaceans) by industrial and/or commercial methods (FAO, 1999). Reference to "fishing" indicates capture of aquatic organisms in marine, coastal and inland areas (FAO, 1999).

Use of a dash (–) between dates representing years, e.g. 2015–2017, signifies the full period involved, including the initial and final years. Asterisks are placed after the elements to which they relate to provide additional information in the same way as endnote numbers. To reflect the closest estimate for data, decimals and percentages are rounded off. Number in money is rounded to the nearest dollar, unless otherwise stated. Decimals and percentages in this document do not necessarily add to totals, because of rounding.

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## A. INTRODUCTION

Nearly half of the world's population relies on marine and coastal biodiversity for livelihood and sustenance. The interconnected oceans, with their manifest capacity to provide free social and economic goods and services to mankind, also buffer the impacts of global warming by absorbing and storing 30 per cent of carbon dioxide that humans produce. The threat of overexploitation, habitat destruction, pollution and climate change are primary negative catalysts to changes in marine ecosystems - one of which is the reduction of fish stocks and other marine resources many developing countries, Small Island Developing States (SIDs) and coastal Least Developed Countries (LDCs) heavily depend on.

Costa Rica, a small Central American country that straddles both the Pacific Ocean and the Caribbean Sea benefits from high fishery productivity level particularly on its Pacific coast consisting of numerous bays, three large gulfs, a large continental shelf and

an exclusive economic zone (EEZ) (FAO, 2004b) ten times the size of its land area (see 1.2). However, due to years of illegal, unreported and unregulated (IUU) fishing, lack of consistency in good fisheries management, governance and enforcement of regulations, Costa Rica is now facing an onerous task of balancing its sustainability and conservation needs against the crucial requirements of promoting the advancement of one of its key economic sectors.

To this end, the UNCTAD-DOALOS project "Evidencebased and policy coherent Oceans Economy and Trade Strategies" supports developing countries such as Costa Rica, in realizing trade and economic benefits from the sustainable use of marine resources within the framework of the 1982 United Nations Convention on the Law of the Sea (UNCLOS). It aims to improve and fortify Costa Rica's capacity to benefit economically from the sustainable use of the available marine resources in its vast EEZ. From this capacity, it is expected that Costa Rica is able to identify and harness trade opportunities arising from the selected ocean-based sector and minimize substantial reliance



Coastal length: 1.290 km<sup>2</sup>

Pacific maritime space: 538,273 km<sup>2</sup>

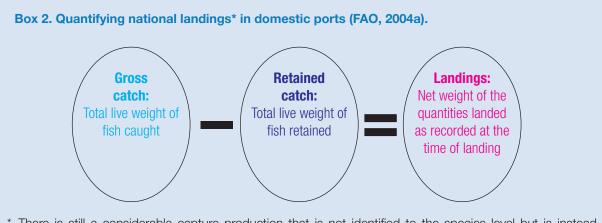
Caribbean maritime space: 26,000 km<sup>2</sup>

Main Pacific landing points: Cuajiniquil Playas del Coco Puntarenas Quepos Golfito

#### Main Caribbean

landing points: Barra del Colorado Puerto Limón

Source: National Geographic Institute - National Registry. Edition 1 IGNCR. 2018



\* There is still a considerable capture production that is not identified to the species level but is instead recorded as marine/freshwater fishes nei (nei = not elsewhere included), marine/freshwater molluscs nei and marine/freshwater (FAO, 2008).

on importation and vulnerability to significant trade barriers including high tariffs and tariff peaks, complex non-tariff measures, and private standards relevant to its export products.

This document presents detailed information on four ocean sectors identified as national priorities in Costa Rica i.e.: (1) Sustainable wild tuna harvesting/fishing, (2) Sustainable marine fisheries (3) Sustainable crustacean aquaculture and (4) Seafood manufacturing, with a view to facilitate the identification and informed selection of the key sectors to be considered for the next phase of the project.

# 1. Costa Rica fishery context: At a glance

#### 1.1. Landings

Recorded total national landings (as calculated in Box 2) in Costa Rica have been slightly declining since 2011, from 16 thousand tons to 13 thousand tons in

at times intermittent, it is important to highlight that there has been no direct effect on the price of the product – in fact, tuna prices have trended downwards over the last five years in both the internal market and international markets (Audun Lem, FAO 2016).

#### Marine fisheries (all fish excluding tuna)

Due to their significant landing volumes, sharks, rays and skates (3,431 tons), and swordfish (1,366 tons) were some of the most important fish species landings in 2015 in the small-scale commercial sector. In 2015, around 77 per cent of the total value in dollars corresponded also to fish species such as sharks, rays, and skates among others (\$15 million), swordfish (\$5 million) and common Dolphinfish (\$4.4 million). There appears to be a downward tendency in the aggregate information on the captured fish species in question (see Figure 2), which may potentially be

Figure 1. Overview of total national landings and tuna landings at domestic ports, 2011-2015

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