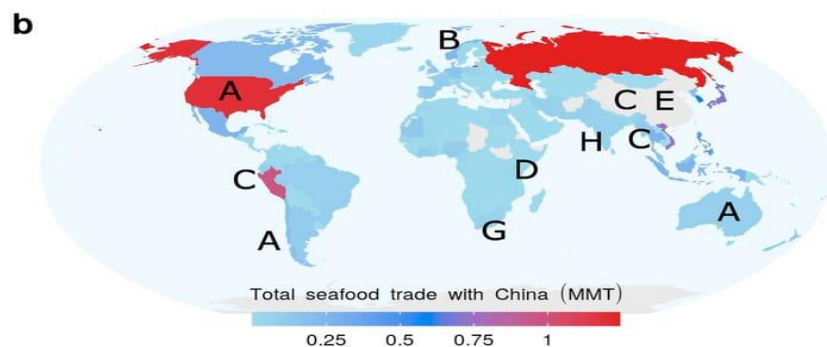
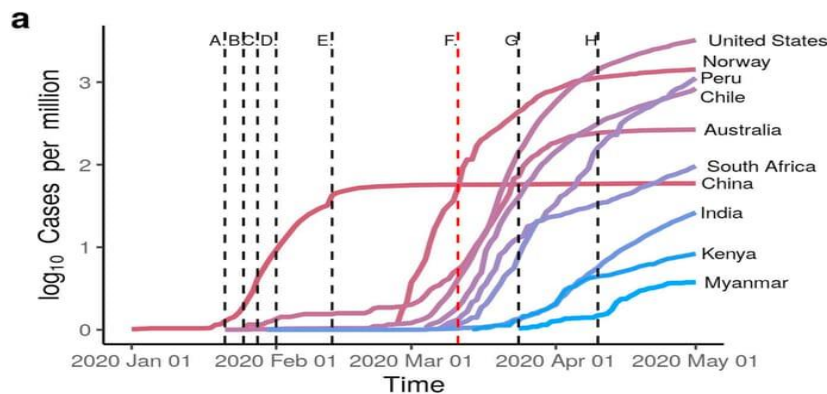




Seafood and the pandemic: moving from shock to stability

The economic and human shocks of the coronavirus pandemic could be a crucial window of opportunity for the global seafood sector.

A newly published Worldfish research paper has analysed the responses of the global seafood sector to the first months of the coronavirus crisis. The research, which focuses on how food systems can build resilience in the face of unforeseen challenges, compares the coronavirus responses of the seafood industry across low- and high-income countries.



- A Wild lobster, farmed salmon, geoduck exports cease
- B Farmed salmon exports to China cancelled
- C Cancelled exports continue. Chinese freezers full, ships re-routed
- D Imports of Chinese tilapia slow
- E Chinese aquaculture exports struggling with border and labor restrictions
- F World Health Organisation declare COVID-19 a pandemic
- G Lobster fishery closed due to cancelled exports to China
- H Slow recovery of exports of farmed shrimp to China and US



The paper finds that existing economic structures leave seafood supply chains vulnerable to shock events like Covid-19. They also warn that sustained waves of coronavirus infections could critically weaken the seafood sector, leaving low-income countries at risk of prolonged nutrition crises. However, if policymakers and industry players can adapt and learn from the lessons of the pandemic, the global seafood system could become more resilient and provide critical food security for all.

The impacts of lockdown – micro to macro levels

The researchers mapped the seafood sector's reactions to Covid-19, identifying public health interventions and the subsequent disruptions to seafood supply chains. The most obvious public health interventions came in the form of lockdowns and official "stay at home" orders. With this as the starting point, the researchers analysed the seafood supply chain based on demand, distribution, labour and production.

Demand

Data shows that demand for seafood took a significant hit as outbreaks of Covid-19 emerged in China. Early lockdowns in January and February 2020 closed the restaurant and food service sector, negatively impacting high-value marine species. Since China is the world's largest producer, consumer and exporter of seafood, reduced consumer demand translated was felt in other elements of the supply chain. The most notable impact was lower import volumes in February, which rebounded by May. Similar trends in demand were seen in the EU, only beginning in February and March. Restaurant closures in the EU corresponded with a 30 percent drop in imported-live fish.

For low-income and food deficit countries, the lockdowns reduced household incomes, leading to fewer purchases of nutrient-dense foods like fish.



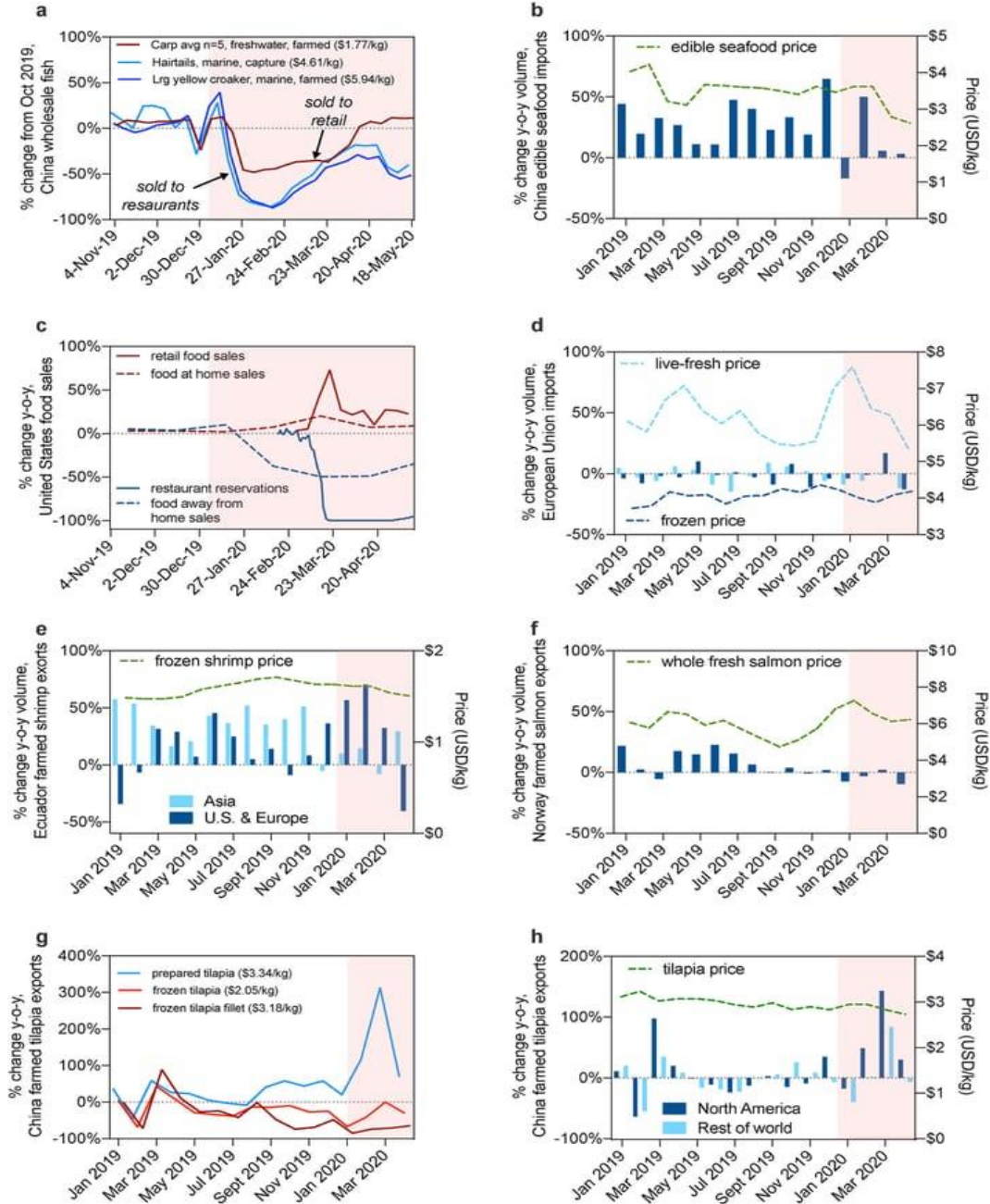


Distribution

On the distribution front, lockdowns and quarantine measures meant significant disruptions to seafood trade flows. Between January and May 2020, seafood shipments were redirected or halted completely in response to shifts in demand, supply and port closures. Fish and shellfish distribution were also impacted by China's decision to ban imports of live animals in January 2020. The restriction of air freight was also a factor.

Cancelled seafood shipments left producers and distributors without a market for their goods. The sustained lockdowns also meant that cold storage facilities were running out of space. For wealthier countries, the researchers noted that some distributors were able to shift goods to other markets. Ecuador was able to redirect shrimp exports from China to the US and Europe, and Norway was able to send its salmon to Brazil instead of China. However, middle- and low-income countries experienced secondary impacts from the disruption. When the normal seafood trade flows shifted, many developing markets saw a much as a 50 percent drop in exports. Though local markets picked up some of the slack, many low- and middle-income countries had seafood deficits and were contending with volatile commodity prices as they entered lockdown.





Labour

Lockdowns caused huge disruptions in employment across the seafood supply chain.

Though skyrocketing unemployment numbers have been reported on the individual level, the impact of the restricted labour supply has been keenly felt in the business sector as well. Labour shortages have had



secondary impacts on the industry – hindering the operations of hatcheries, feed mills and processing plants.

For low-income countries, lockdowns had disastrous effects on labourers in the seafood sector. Since seafood workers in low-income countries tend to be either casual or self-employed, movement restrictions often meant they couldn't work, leading to spikes in unemployment statistics. Sustained unemployment also caused a drop in household income, further restricting purchasing power.

Production

Economic data indicates that seafood production decreased in tandem with Covid-19 cases. Lockdowns decreased aquaculture output, since producers have been struggling to gauge consumer demand for fish. Some producers report raising species with long grow-out periods in hopes of waiting out the economic uncertainty, but this can only work in the short term.

The production end of the seafood sector is also experiencing second order effects from the other links in the supply chain. Import restrictions have meant that some fish farmers haven't been able to access broodstock, distribution and demand issues have negatively impacted sales and profit margins and lockdowns have translated into labour shortages.

Meeting the challenge

Multiple systems and stakeholders reacted to the emerging pandemic. For governments, the central aim was to protect public health while staying ahead of a looming economic crisis. In wealthy countries, governments took short-term actions to maintain seafood supplies for consumers and to support people whose jobs, businesses and incomes were affected by pandemic-related disruptions.



To maintain seafood supplies during lockdowns, many governments designated food processing and food retail as “essential work”, ensuring that these businesses remained open despite stay at home orders. Governments and the seafood industry enacted measures to protect worker health as the pandemic continued. This included extra sanitation steps, issuing protective equipment during processing and shifting to remote working where possible. Though portions of the seafood industry have weathered the first stage of the pandemic, many businesses and individual operators haven’t been able to stay afloat in the current market.

While wealthy and industrialised economies can “do what it takes” to mitigate the worst impacts of Covid-19, lower- and middle-income countries “do what they can”. In this case, NGOs stepped up and supplemented government relief for the seafood sector. In India and South Africa, the researchers found that the FAO, World Bank and WorldFish provided policy advice and expertise to improve government responses. The main outcomes between January and May were price floors for seafood and building the capacity of foodbanks to distribute fish to food-insecure people.

A year into the pandemic, the key question is when the short-term coping measures will be replaced by longer-term strategies that will strengthen the seafood sector.

From the other side of the pandemic

Optimists within the seafood sector can reframe the shocks of Covid-19 as a window of opportunity and a chance to engage in “lessons learned”. In this line of thinking, the upheaval and economic restructuring caused by outbreaks allows the industry to become greener and more resilient as it rebuilds. It also forces industry actors to adjust to the new status quo and avoid repeating the mistakes of past responses.

Based on initial analysis, the researchers identified an number of key lessons from the early stages of the pandemic.





Trade

The first relates to trade restrictions. Many of the economic shocks stemming from Covid-19 could be magnified or mitigated through trade policy. Based on the available data, the researchers believe that countries should maintain seafood supply buffers – relying less on “just in time” sourcing and more on “just in case” reserves of goods.

The discrepancy between seafood importing and exporting countries will be another recurring challenge. Covid-19 has illustrated the power imbalances in our food system. For many years, the global industry has concentrated seafood production into a small number of exporters, leaving the system vulnerable to shocks and disruptions. This imbalance jeopardises the food security and stability of low-income countries. International cooperation shouldn't be underestimated either. Maintaining international trade relationships will prevent negative behaviours like food hoarding and export bans.

Government

The coronavirus crisis changes how governments operate, especially when it comes to ensuring food security for their citizens and residents. Price fluctuations and product shortages accompanied the economic fallout from lockdowns and shuttered sectors. Though these shocks were offset by government aid and alternative food purchases in high-income countries, this strategy isn't easily replicated in lower- and middle-income nations. Seafood sector labour in these countries is often informal or undocumented – people won't be applicable for government aid. Lower- and middle-income countries could also face a nutrition crisis if a second wave of infections emerge. The research team suggests introducing price caps on micronutrient rich foods – like oily fish – to prevent malnutrition.

Managing production

The researchers also note that government programmes aimed at stabilising the seafood sector shouldn't overstimulate production.





Though the official supports have kept fisheries afloat during the pandemic, there is a risk that the programmes encourage overfishing and cause environmental harm. Attempts to restart aquaculture operations should also ensure that sustainability and environmental targets aren't watered down to meet production quotas. Governments need to balance industry stability and long-term sustainability when contending with shocks like Covid-19. This balance is key to building resilience in the seafood sector.

Looking ahead

The researchers also identified a number of medium- and long-term research priorities.

"We propose a series of immediate and longer-term research needs to guide strategic research investments, and show examples of new studies that fill proposed research gaps. Covid-19 has also highlighted the vulnerability of certain groups working in- or dependent on the seafood sector. Early coping and adaptive responses, combined with lessons from past shocks, can help inform steps to build resilience in the sector," they wrote.

Medium-term priorities

- To complement price and production data, use survey tools to document and better understand Covid-19 impacts on people working at all levels in seafood value chains and seafood consumers in order to direct support to vulnerable actors in the seafood system.
- Document and share case-experiences of actors in the value chain that have adapted to shifts in supply and demand of seafood so lessons from their strategies can be more widely adopted.
- Improve open data and data sharing platforms to facilitate the exchange of information about the societal impacts of Covid-19, to enable more rapid and coordinated responses to future shocks.



Longer-term priorities

- To design future response strategies in support of the ‘tropical majority’ of small-scale fish producers and traders, draw on lessons from social safety net programs in other food sectors, and experience with implementing the Human Right to Food.
- Improve information systems to track fish prices and trade volumes typically consumed by different types of consumers (particularly in LMICs) to reduce wasted fish and enable value chains to respond to consumers' nutrition needs and demand preferences. This may include full traceability of species and stocks based on molecular/DNA analysis.
- Focus resilience research on those parts of the aquaculture and fisheries system that supply populations most nutritionally dependent on seafood and those which, through employment, support food security of low-income value chain actors.
- Develop and apply an evaluation framework and resilience indicators for seafood value chains, that include social economic and environmental aspects, to identify and learn from resilience ‘hot-spots’.
- Study temporal effects of the shock on employment in the sector, on migration, on adoption of technologies for production and processing, to better design future crisis-coping strategies and recovery efforts.
- Study immediate and longer-term impacts on natural resource systems to identify means to sustain resources during and after future system shocks.
- Understand how the fisheries and aquaculture sectors may or may not be different from other food sectors from a resilience perspective for Covid-19 and other large-scale disturbances.

Etude complète :

<https://www.sciencedirect.com/science/article/pii/S2211912421000043>

Lien article :

<https://thefishsite.com/articles/seafood-and-the-coronavirus-pandemic-moving-from-shock-to-stability>

