

What do we know on the sustainability impact of fisheries subsidies?

Building evidence in support of targeted subsidies reform

Claire Delpeuch, Head of the OECD Fisheries and Aquaculture Unit

Claire.Delpeuch@oecd.org

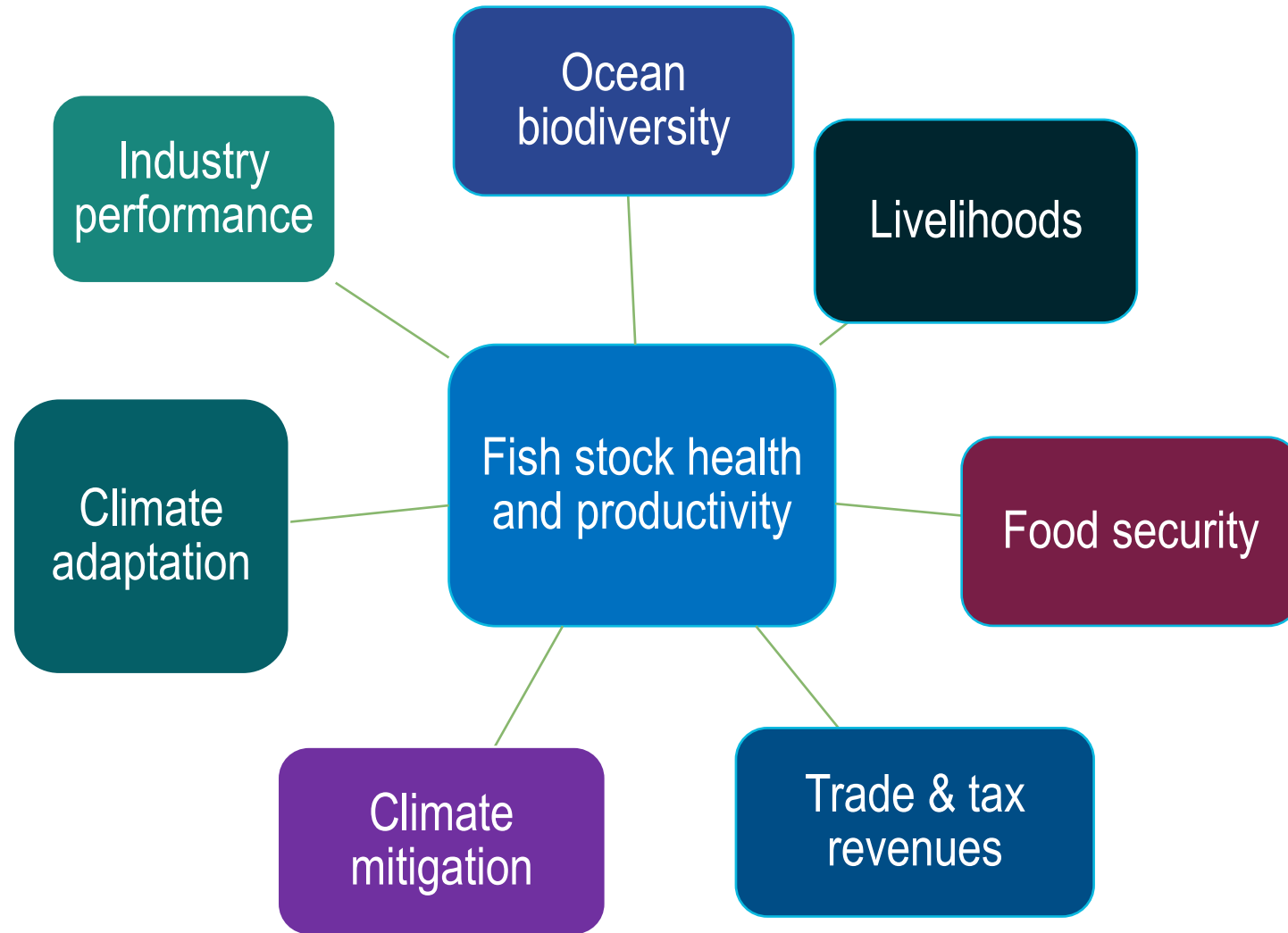
Fisheries Subsidies' Contribution to Overcapacity and Overfishing: A refresher on key conceptual frameworks

IISD - Tuesday 7 July 2026



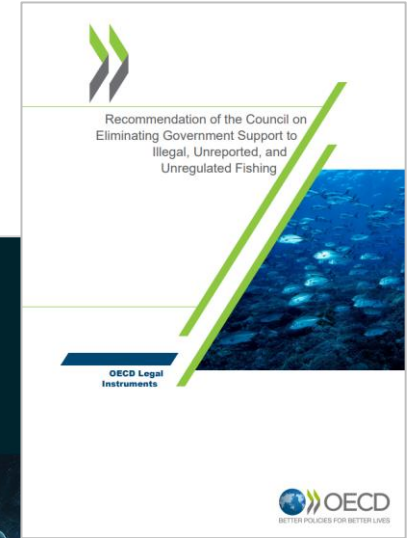
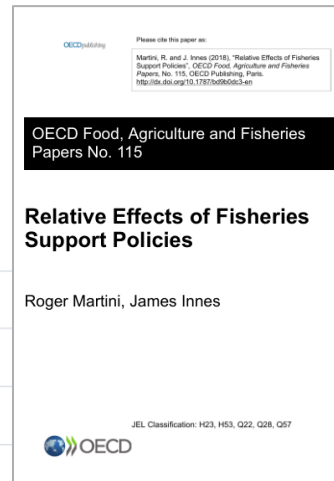
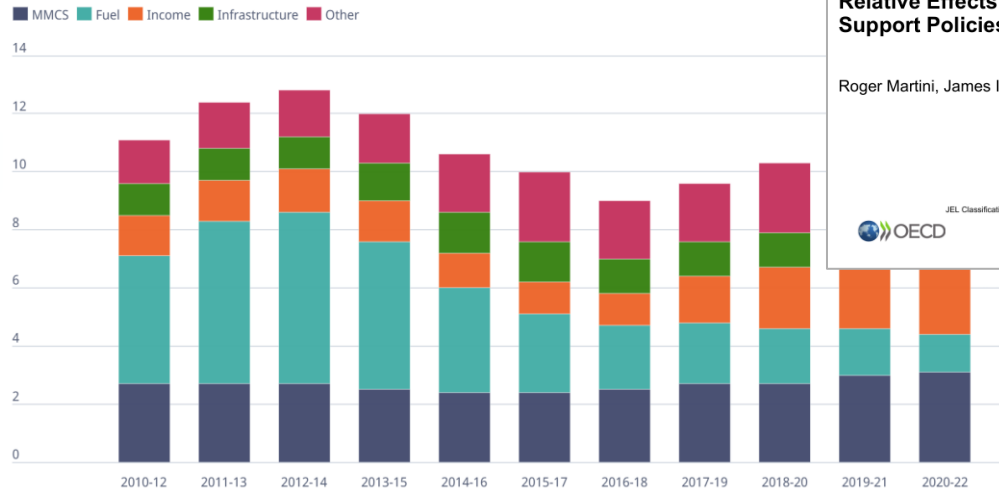
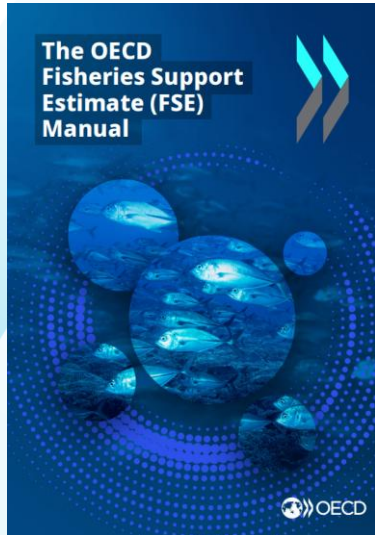


Fish stock health and productivity is central to everything fisheries can offer to societies



The OECD work on fisheries subsidies

In support of global reform processes



2001

Doha Mandate (WTO)
International plan of action against IUU fishing (FAO)

2010

Convention on Biological Diversity (CBD) Aichi Target 3

2015

Agenda 2030
SDG 14
Target 14.6

2022

WTO Agreement on Fisheries Subsidies ('Fish 1')
Kunming-Montreal Biodiversity Framework (CBD) Target 18

2025

Entry into force of the WTO Agreement on Fisheries Subsidies

2026

Continuation of WTO negotiations on comprehensive disciplines – Towards 'Fish 2'



Insights from a stylized model

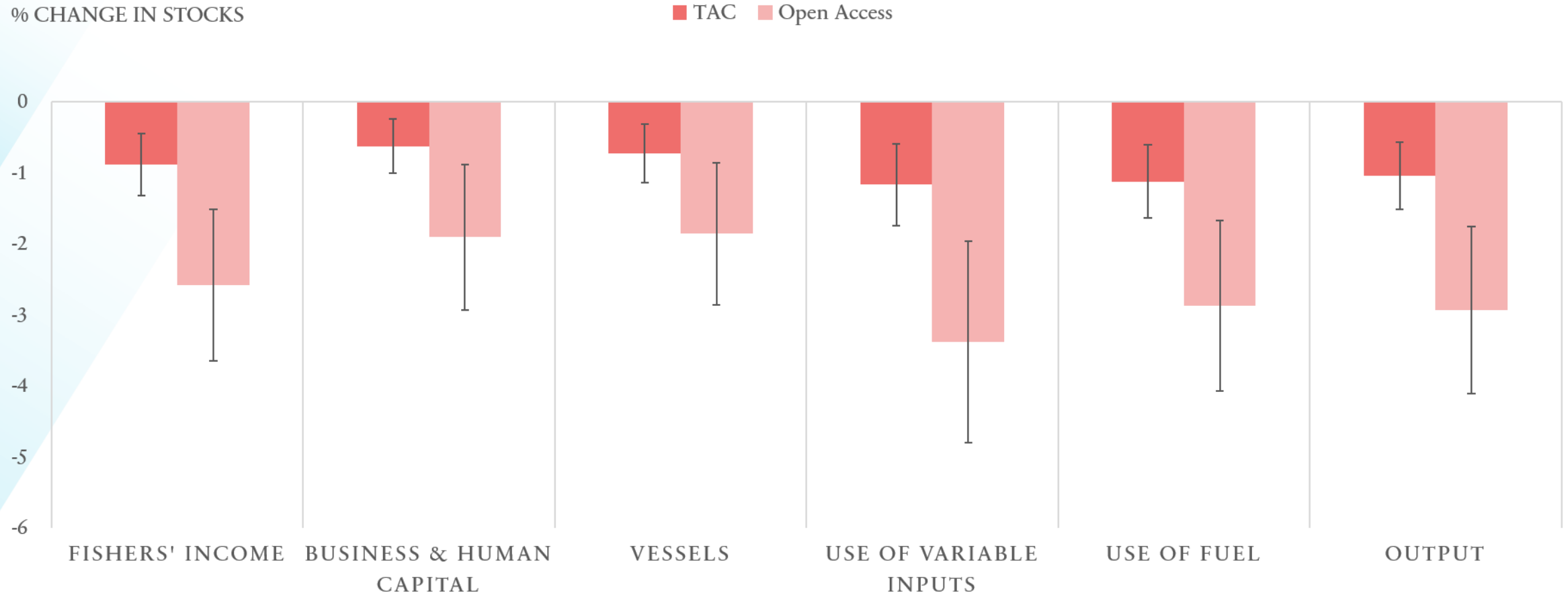
- The OECD FishPEM model (Martini & Innes, 2018) looks at the effect of policies in general terms
- Not specific implementation in countries
- Uses a global model to develop indicators of effect that are empirically-based and theoretically robust.
- Relatively rich literature pointing to similar conclusions (see OECD Review of Fisheries for a list of references)

Policy types – Payments based on...
... income
... Business and human capital
... vessels
... use of variable inputs
... fuel
... output

Effects Measured
Overfishing
Overcapacity
Effect on Stocks
Tendency to provoke IUU fishing
Income benefits for fishers



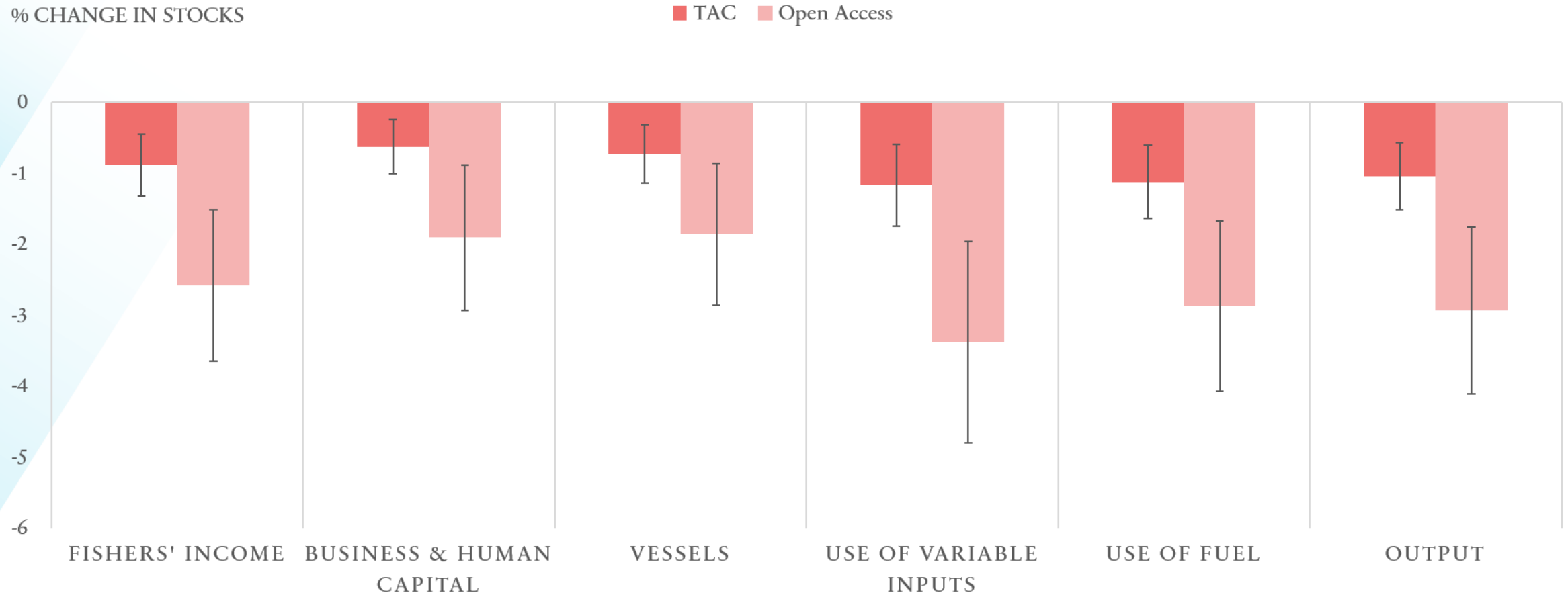
Adverse sustainability impact arises most when support affects fishing costs & benefits



(Martini & Innes, 2018)



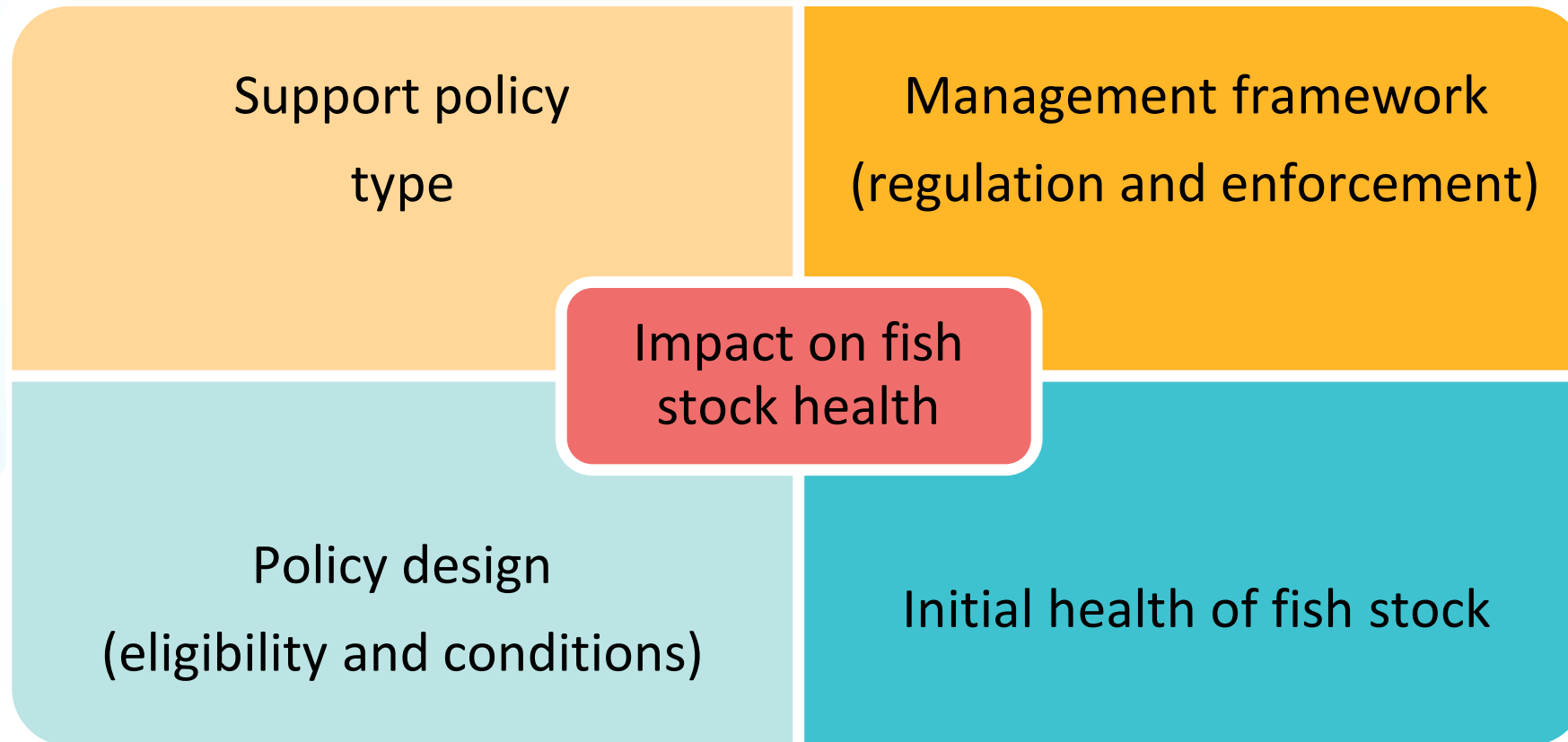
The key role of management



(Martini & Innes, 2018)



Key factors in sustainability impact





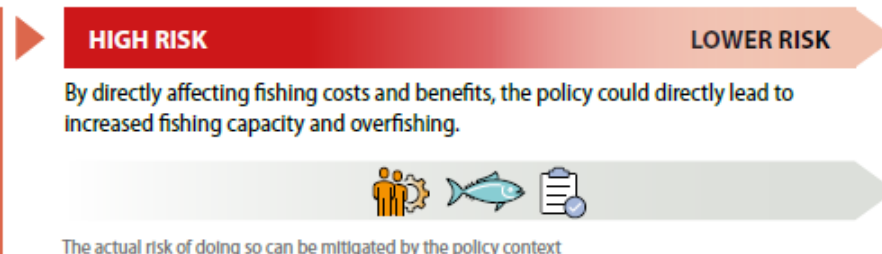
Identifying the risk of supporting unsustainable fishing

A tool to inform fisheries subsidies reform

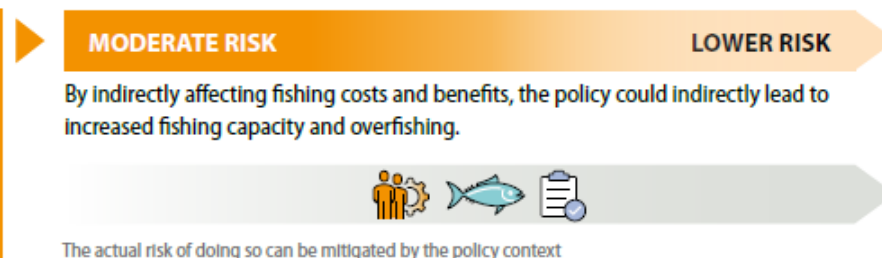
Policy support type

- Vessel construction & purchase
- Vessel modernisation & gear (capacity enhancing)
- Fuel
- Access to infrastructure
- Access to other countries' waters
- Preferential insurance

Risk of support encouraging unsustainable fishing



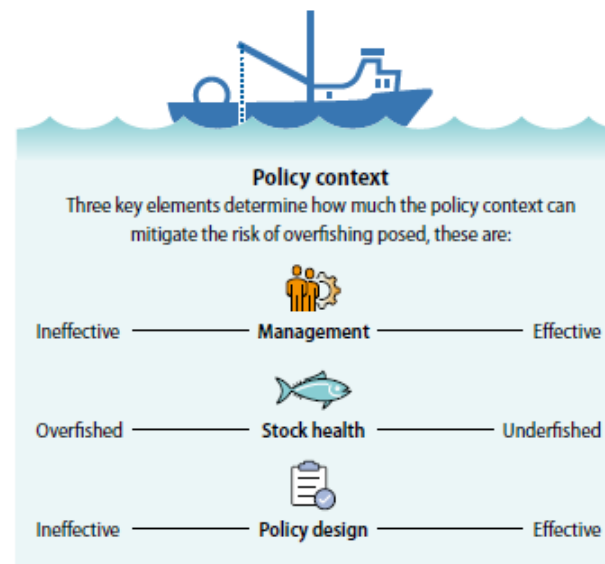
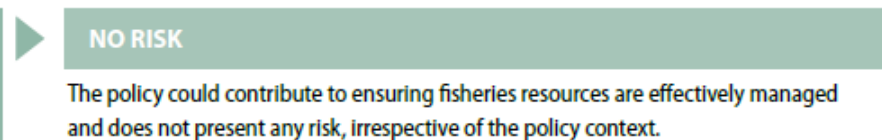
- Vessel modernisation & gear (safety & environmental impact)
- Infrastructure construction & modernisation
- Fisher income
- Buyback of vessel or licence



- Education & training
- Marketing & promotion
- Research & development (other than stock assessment)



- Stock assessment
- Monitoring, control & surveillance
- Fisheries management
- Environmental maintenance





Identifying reform priorities

The OECD Fisheries Support Estimate



**Fisheries support =
subsidies +**



**The nature of policies:
what is being supported?**



**Amounts spent by the
government with each
policy, each year**



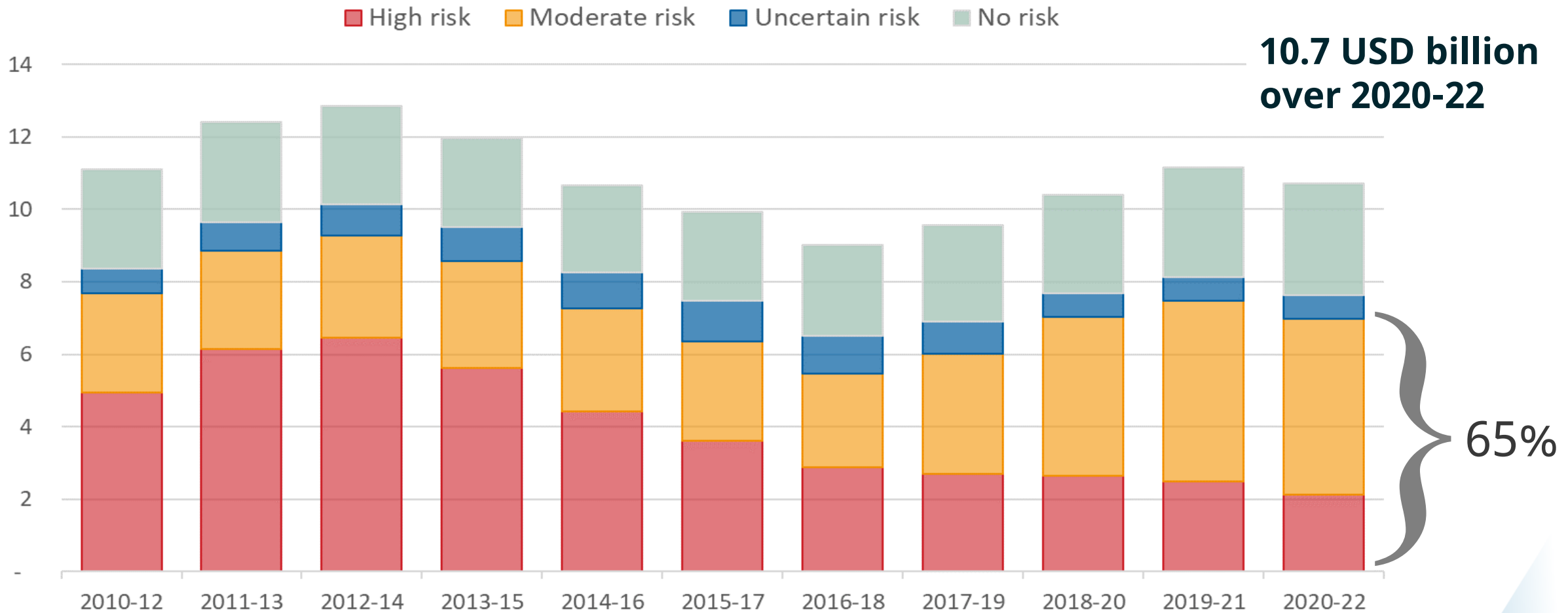
**Key characteristics of
those policies**

Support to the fisheries sector		
S01	Support to vessel construction and purchase	Direct payment to vessel owner (i.e. vessel subsidy); revenue foregone due to tax concession on related taxes such as import taxes; cost of dedicated preferential finance to buy a vessel
S02	Support to vessel modernisation and purchase of gear	Direct payment to fisher/vessel owner (i.e. vessel modernisation subsidy); revenue foregone due to tax concession on related taxes such as import taxes; cost of dedicated preferential finance to modernise a vessel
S03	Support to fuel consumption	Direct payment to fisher/vessel owner (i.e. fuel subsidy); revenue foregone due to tax concession on fuel taxes
S04	Support for access to infrastructure	Direct payment to fisher/vessel owner (i.e. subsidised access to infrastructure); cost of operating public infrastructure
S05	Support to infrastructure construction and modernisation	Cost of infrastructure construction or modernisation programme or direct payment (i.e. subsidy) to infrastructure provider; cost of dedicated concessional finance for constructing or modernising infrastructure
S06	Support for access to other countries' waters	Payment by the government to a foreign government or direct payment to fisher/vessel owner (i.e. subsidy) to compensate for the fees paid to access foreign waters
S07	Support to fisher income	Direct payment to fishers not covered by other FSE categories (i.e. income subsidy)
S08	Preferential insurance for fishers	Cost of preferential insurance programme
S09	Buyback of vessel or licence	Direct payment to fisher/vessel owner (i.e. subsidy) for giving up on a fishing licence or decommissioning of a vessel
S10	Support for education and training	Direct payment to fisher (i.e. education and training subsidies) or cost of running a programme
S11	Support for environmental maintenance	Direct payment to fisher/vessel owner (i.e. environmental subsidy) for environmental services or cost of programme
S12	Support for marketing and promotion	Direct payment to fisher (i.e. subsidy) or cost of programme
S13	Support to research and development other than stock assessment	Direct payment to fisher/vessel owner/vessel constructor/research group (i.e. R&D subsidy) or cost of programme
S14	Stock assessment	Cost of programme (including, inter alia, data collection and human resources); payment to external body conducting stock assessments
S15	Monitoring, control and surveillance	Cost of programme (including inter alia, at sea surveillance, VMS and AIS systems, observer programmes)
S16	Fisheries management	Cost of programme (including, inter alia, stock enhancement, participation in RFMOs, administering of stock management tools)
S17	Other support	Any other direct payment, revenue foregone, preferential finance, cost of programme



Identifying the risk of supporting unsustainable fishing

A majority of support calls for careful targeting

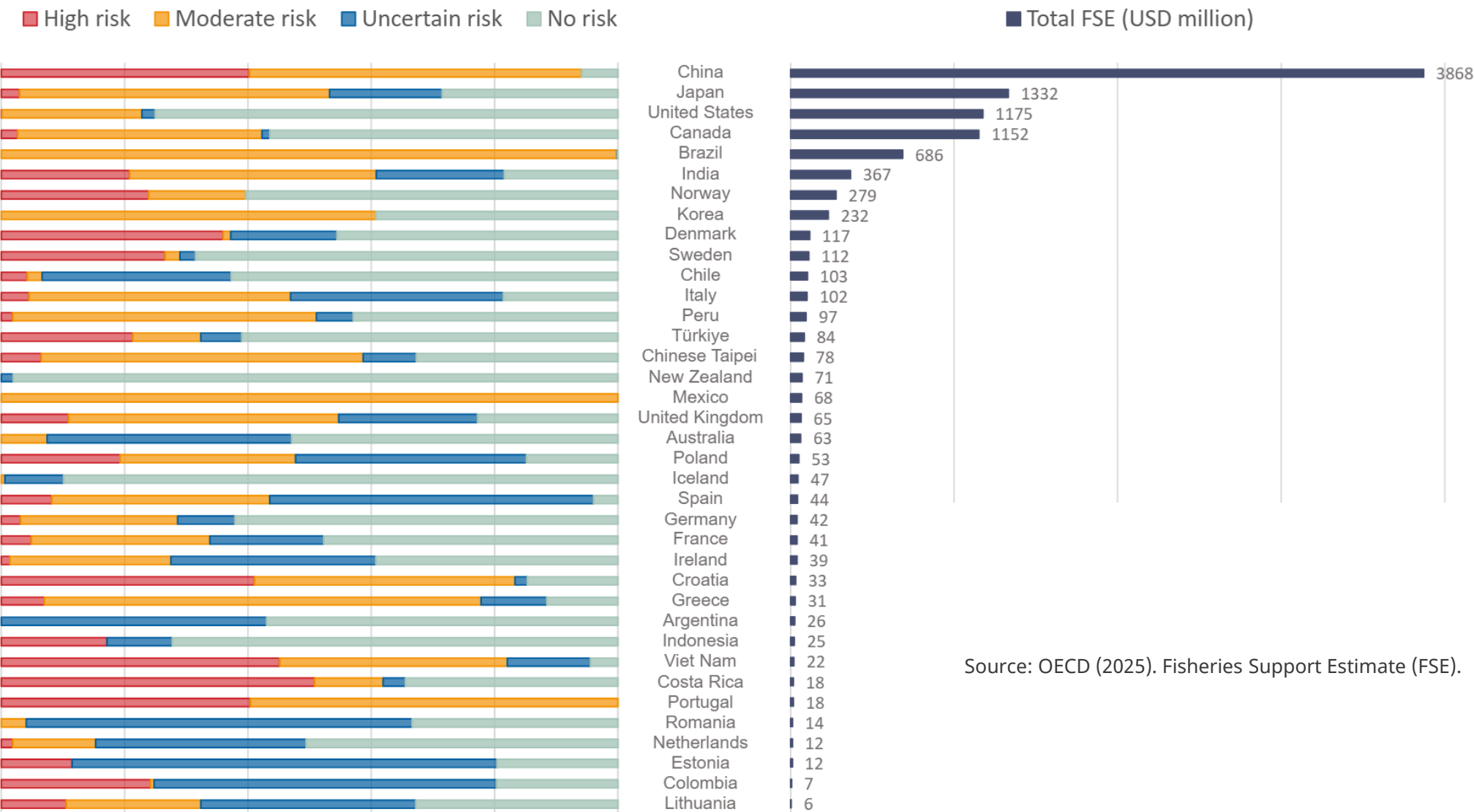


Source: OECD Review of Fisheries, 2025



Identifying the risk of supporting unsustainable fishing

Figure 7.3. Support to fisheries by risk of encouraging unsustainable fishing in the absence of effective management (left) and total support (right), across economies, 2020-22

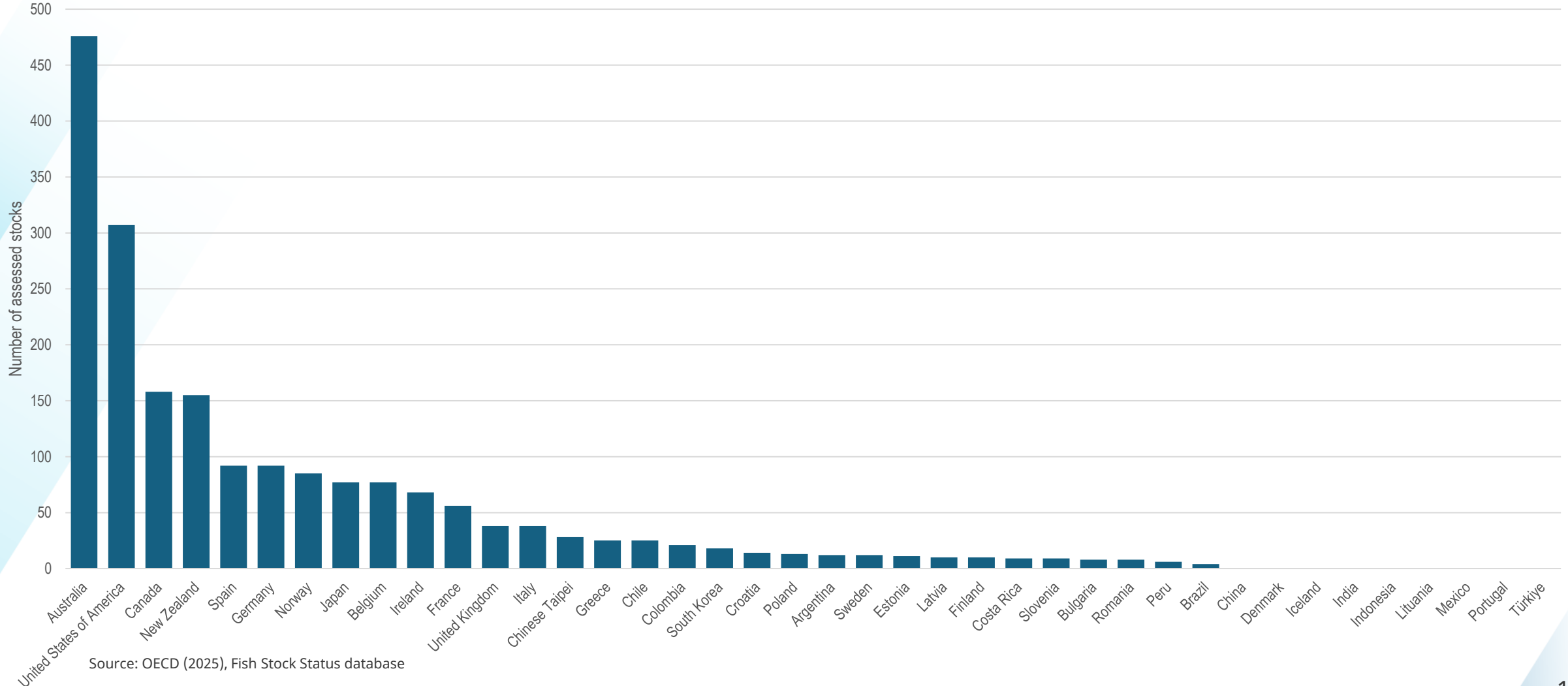


Source: OECD (2025). Fisheries Support Estimate (FSE).



Understanding the fisheries context

Stock status knowledge remains limited in many places (2024)





Understanding the fisheries context

The management of supported fisheries

Figure 5.1. Proportion of landings from the most commercially valuable species that were covered by total allowable catch limits in 2022

■ TAC ■ Partial ■ No Tac

Note : TAC (Total allowable catch limit)



Source: OECD Review of Fisheries 2025



OECD Fisheries work



We invite you to stay in touch
by signing up to
[our newsletter](#)

and following us on LinkedIn
[OECD Trade and Agriculture](#)



OECD

OECD Review of Fisheries 2025

OECD
BETTER POLICIES FOR BETTER LIVES

Policy Brief

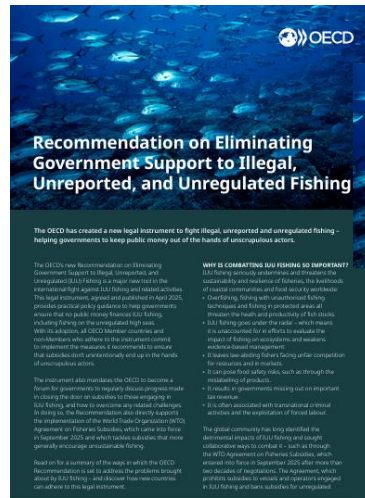
How can government spending
better support productive and
resilient fisheries?

14 April 2025

Key messages

- Fisheries and aquaculture provide employment for millions and food for billions. Governments often take an active role in supporting the sector by managing and controlling where, how and by whom fishing is allowed, and by funding goods and services for the sector. Many types of government support policies are typically used at once, otherwise known as the support policy mix.
- The OECD Fisheries Support Estimate (FSE) database tracks the monetary value of government support to capture fisheries by compiling official data on government spending and classifying it into mutually exclusive policy categories based on what is being supported (e.g. vessel construction or at-sea vessel monitoring).
- Government support to fisheries can help to maintain fish stock health and productivity, with benefits for communities, the economy and the environment. But some support can also unintentionally lead to negative impacts, notably when it inadvertently results in overfishing and illegal, unreported and unregulated (IUU) fishing.
- The last decade has seen a reduction in the proportion of support that presents a high risk of encouraging unsustainable fishing, mostly due to falling fuel subsidies in China and other major providers of support – but support that presents a moderate risk has increased in parallel, most notably due to increases in income support for fishers. As a result, almost two-thirds (65%) of all government support to fisheries still risks encouraging unsustainable fishing in the absence of effective management compared to a peak of 72% in 2012-14.
- Recent years have also seen increased government spending on fisheries management, monitoring, control and surveillance (MNCSS), a no-risk policy which, in fact, contributes to lowering the risk that other types of support result in unsustainable fishing. This is particularly the case in OECD Member countries, where MNCSS constitutes almost half of all government support.

HOW CAN GOVERNMENT SPENDING BETTER SUPPORT PRODUCTIVE AND RESILIENT FISHERIES? © OECD 2025



OECD

Recommendation on Eliminating Government Support to Illegal, Unreported, and Unregulated Fishing

OECD

关于消除政府对非法、未报告和未管制捕捞支持的建议

OECD

关于消除政府对非法、未报告和未管制捕捞支持的建议

Recommendation on Eliminating Government Support to Illegal, Unreported, and Unregulated Fishing

The OECD has created a new legal instrument to fight illegal, unreported and unregulated fishing – helping governments to keep public money out of the hands of unscrupulous actors.

The OECD's new Recommendation on Eliminating Government Support to Illegal, Unreported, and Unregulated (IUU) Fishing is a legal instrument that sets out the international right against fish fishing and aquaculture activities. The legal instrument, signed and endorsed in April 2025, provides practical policy guidance to help governments ensure that public money supports legal fishing, excluding fishing on the unregulated high seas. With its adoption, all OECD Member countries and non-Member states will be able to implement the instrument, and governments will be able to ensure that public money supports legal fishing, excluding fishing on the unregulated high seas.

The instrument also mandates the OECD to become a forum for governments to regularly discuss progress made in implementing the instrument, and to provide advice and support to help governments implement the instrument. The instrument also sets out the implementation of the Recommendation, which will be implemented in 2025, and which includes additional measures to encourage governments to implement the instrument.

The instrument also sets out the implementation of the Recommendation, which will be implemented in 2025, and which includes additional measures to encourage governments to implement the instrument.

关于消除政府对非法、未报告和未管制捕捞支持的建议

经合组织 (OECD) 制定了一项新的法律文书，旨在消除政府对非法、未报告和未管制捕捞的支持，帮助各国将公共资金保持在守法渔民手中。

经合组织 (OECD) 制定了一项新的法律文书，旨在消除政府对非法、未报告和未管制捕捞的支持，帮助各国将公共资金保持在守法渔民手中。该文书旨在确保公共资金用于支持合法的渔业活动，而不是用于支持非法、未报告和未管制的捕捞活动。该文书将要求所有 OECD 成员国以及非成员国在 2025 年实施该文书，并包括鼓励各国实施该文书的额外措施。



ข้อเสนอแนะเรื่องการยุติการช่วยเหลือจากทาง รัฐบาลต่อการประมงที่ผิดกฎหมาย ไม่มีการจัดทำ เอกสารรายงานและไม่มีการกำกับดูแล

ข้อเสนอแนะเรื่องการยุติการช่วยเหลือจากทางรัฐบาลต่อการประมงที่ผิดกฎหมาย (OECD) เป็นเครื่องมือทางกฎหมายระหว่างประเทศที่สร้างขึ้นเพื่อช่วยให้ประเทศสมาชิกสามารถระบุและยุติการช่วยเหลือทางรัฐบาลต่อการประมงที่ผิดกฎหมาย (IUU) ได้ ข้อเสนอแนะฉบับนี้ได้รับการรับรองโดยรัฐมนตรีว่าการประมงของ OECD ในเดือนเมษายน 2025 และจะเข้าเป็นผลบังคับใช้ในวันที่ 1 ตุลาคม 2025

ข้อเสนอแนะฉบับนี้ยังกำหนดให้ OECD กลายเป็นเวทีสำหรับการหารือเป็นประจำเกี่ยวกับความคืบหน้าในการดำเนินการตามข้อเสนอแนะ และให้คำแนะนำแก่ประเทศสมาชิกในการดำเนินการตามข้อเสนอแนะ นอกจากนี้ ข้อเสนอแนะยังกำหนดให้ OECD จัดทำรายงานประจำปีเกี่ยวกับความคืบหน้าในการดำเนินการตามข้อเสนอแนะ และให้คำแนะนำแก่ประเทศสมาชิกในการดำเนินการตามข้อเสนอแนะ



Rekomendasi untuk Menghentikan Dukungan Pemerintah terhadap Penangkapan Ikan Ilegal, Tidak Dilaporkan dan Tidak Diatur ('Illegal, Unreported, and Unregulated (IUU) Fishing')

OECD telah mengembangkan instrumen hukum baru untuk memerangi penangkapan ikan ilegal, tidak dilaporkan dan tidak diatur (IUU fishing) – untuk memastikan upaya pemerintah memangkas anggaran dana pemerintah ke tangan pelaku ilegal dan berisiko tinggi.

Rekomendasi ini menetapkan bahwa OECD akan menjadi forum bagi pemerintah untuk secara teratur membahas kemajuan dalam melaksanakan rekomendasi, dan memberikan dukungan teknis kepada pemerintah yang membutuhkan. Rekomendasi ini juga menetapkan bahwa OECD akan mengeluarkan laporan tahunan tentang kemajuan dalam melaksanakan rekomendasi, dan memberikan saran kepada pemerintah yang membutuhkan.

Recomendação sobre a eliminação incentivo governamental à pesca não declarada e não regulamen

A OECD criou um novo instrumento jurídico para combater a pesca ilegal, não declarada e não regulamentada, protegendo o dinheiro público contra as atividades mal-intencionadas.

A recomendação da OECD cria um mecanismo legal para garantir que o dinheiro público não seja usado para apoiar a pesca ilegal, não declarada e não regulamentada. O instrumento também exige que a OECD se torne um fórum para que os governos possam discutir regularmente o progresso na implementação da recomendação e oferecer assistência técnica aos países que a precisarem. Além disso, a recomendação exige que a OECD publique um relatório anual sobre o progresso na implementação da recomendação e ofereça recomendações aos países que precisarem.

Restricted Use - À usage restreint