



REPORT OF THE ECUADORIAN TUNA SECTOR

AUGUST 2017



Ministerio de
Comercio Exterior



An underwater photograph of several tuna fish swimming in clear blue water. The fish are the central focus, with their sleek bodies and fins clearly visible. The lighting is natural, creating a serene and professional atmosphere. The entire image is framed by a white border.

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1. Tuna Industry in Ecuador

The Ecuadorian fishing industry has been developing activities for international trade since the middle of the twentieth century. Until then, this industry was focused on covering the national demand.

The exporting fishing industry was preceded by the following two important facts:

- a) The signing of the Santiago Declaration between Chile, Peru and Ecuador in 1952, with the aim to preserve the marine resources of those countries. Since then, Ecuador adopted as part of its foreign marine policy, the sovereignty and exclusive jurisdiction over the minimum distance of 200 nautical miles; and,
- b) The introduction of industrial fishing activity associated with the capture, processing and commercialization of tuna and marine shrimp, and the establishment of plants in Manta, Guayaquil and Posorja.

The creation of a cluster, which has been perfected over the years, with integrated processes both horizontally and vertically, has boosted the growth of the tuna industry. This cluster integrates a productive chain that goes from the extraction of the fishing resource, through a fishing fleet of its own, to the production and export of the product.

The tuna industry also generates productive links with other industrial activities, such as the processing of fishmeal and related industries, suppliers of inputs and materials for the tuna value aggregating chain, and other support services (hydrocarbons, aluminum, port services, logistics, refrigeration, water treatment, laboratory, among others).

2. Profile and Economic Importance of this Sector

The tuna industry is the main activity for the industrial fishing sector of the country, and it has achieved, in its three phases: capture, processing and marketing, the accomplishment of national, international, and labor regulations and quality standards from: INEN (Ecuadorian Service of Normalization), MAG (Ministry of Agriculture and Livestock, know before as MAGAP), INP (National fishing institute), WTO, IATTC, FDA, WHO, FAO, ISO, DOLPHIN SAFE, HALAL, IFS, BRC, KOSHER, and ILO.

It is estimated that, between capture and processing, this industry generates an average of 24,000 direct jobs and 120,000 indirect jobs. At least 53% of the individuals employed in tuna processing plants are women.

The tuna industry has become a major income source for the Ecuadorian economy. From 2010 to 2016, 65.48% of profit derived from the fishing industry came from the tuna industry, with tuna representing 8.71% of the non-oil Ecuadorian exports (this estimate pertains solely to canned tuna and tuna loins, 1604.14 and 1604.20, respectively).



2.1. Tuna Capture

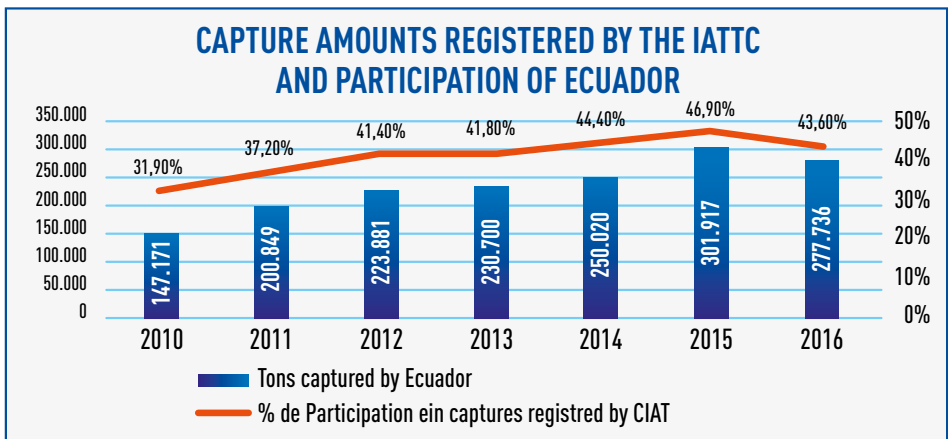
The Ecuadorian tuna industry is particularly focused on capturing the following species; yellowfin tuna (*Thunnus albacares*), bigeye tuna (*Thunnus obesus*) and skipjack and bonitos (*Katsuwonus pelamis*). In general, these species are used for the processing of tuna into canned tuna, as well as tuna loins.

The Ecuadorian tuna fishing fleet is one of the most important fleets of the Eastern Pacific Ocean (EPO).

Initially, the tuna industry consisted of 42 bait boats and 26 purse seiners with small capacity and autonomy. However, by 1998, Ecuador reached second place among the countries with the most captures in national and international waters, after Mexico. According to the IATTC, Ecuador even reached first place in 1999, representing 43.60% of the EPO captures (Figure No. 1). From 2010 to 2016, Ecuador represented, on average, 41.03% of the total captures registered in the IATTC, followed by Mexico (23.13%), Panama (10.30%), Venezuela (7.15%) and Nicaragua (2.59%).

Currently, the tuna fleet is composed of 114 vessels, which provide 60% of the raw material required by the national industry.

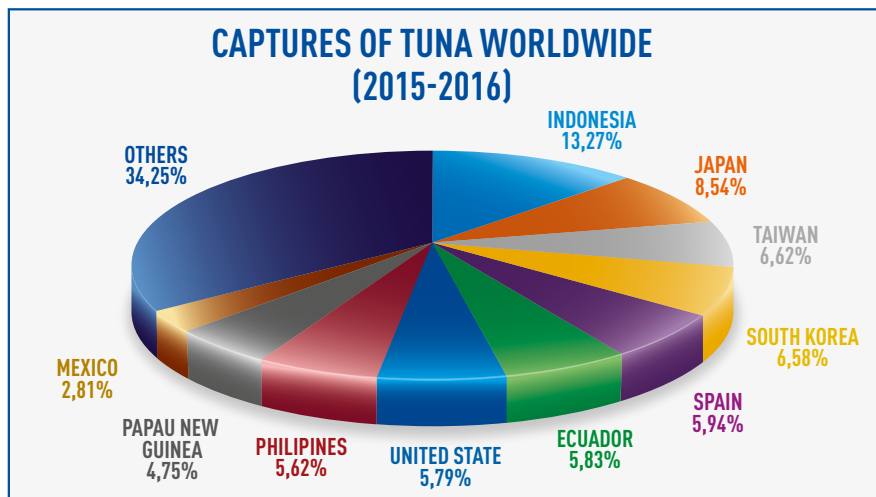
Figure No. 1



Source: CIAT - Species of tuna considered: yellowfin, bigeye, skipjack and bonitos, pacific bluefin, albacore, blacklist, and other species.
Prepared by: Ministry of Foreign Trade.

According to statistical information from the Food and Agriculture Organization of the United Nations (FAO), Ecuador ranks sixth worldwide in terms of tuna captures in all oceans, representing 5.83% of the total caught during the period 2010-2015, for the following species: yellowfin tuna, bigeye tuna and skipjack and bonitos. For this same period, Indonesia (13.27%), Japan (8.54%), Taiwan (6.62%), South Korea (6.58%) and Spain (5.94%) were the countries that registered the highest amount of tuna captures worldwide (Figure No. 2). In 2015, Ecuador increased its share to 7.06%.

Figure No. 2



Source: FAO
Prepared by: Ministry of Foreign Trade

It is important to mention that Ecuador as one of the 6 countries in the world that register the highest amount of tuna captures, is the only country that is part of a Regional Fishing Management Organization that establishes a seasonal prohibition of 62 days for maintaining tunas among the EPO.

2.2 Tuna Processing



The tuna cannery enterprises are located in 3 Provinces on the coast: Guayas, Manabi and Santa Elena. However, almost 60% of the exportable supply of this industry is concentrated in Manabi (Chart No. 1). The production capacity (processing and packaging) consists of approximately 500,000 tons of raw tuna. The artesian fishery provides an approximate amount of 3,000 tons per year.

Chart No. 1

Ecuadorian canned tuna enterprises			
Enterprise	Location		Type of product
A SISERVY S.A.	Jaramijó	Manabí	Loins and canned
BILBOSA S.A.	Montecristi	Manabí	Loins
EUROFISH S.A.	Manta	Manabí	Loins and canned
GALAPESCA S.A.	Guayaquil	Guayas	Canned
IDEAL CIA. LTDA.	Manta	Manabí	Loins and canned
INEPACA	Manta	Manabí	Canned
CONSERVA ISABEL ECUATORIANA S.A.	Manta	Manabí	Canned
MARBELIZE S.A.	Manta	Manabí	Loins and canned
NEGÓCIOS INDUSTRIALES REAL N.I.R.S.A. S.A.	Posorja	Guayas	Loins and canned
PESPESCA	Montecristi	Manabí	Loins
SALICA DEL ECUADOR S.A.	Posorja	Guayas	Loins and canned
SEAFMAN SOCIEDAD ECUATORIANA DE ALIMENTOS Y FRIGORIFICOS MANTA CA	Manta	Manabí	Loins and canned
TECNICA Y COMERCIO DE LA PESCA C.A. TECOPESCA	Manta	Manabí	Loins and canned
SERVITERRA S.A.	Monteverde	Santa Elena	Loins, canned and pouch
ENVASUR S.A	Valdivia	Santa Elena	Canned
INCOPE S CIA LTDA	Guayaquil	Guayas	Canned
OLIMAR	Manta	Manabí	Canned
CONSERVERA TROPICAL	Manta	Manabí	Loins
CELDEMAR ELABORADOS DEL MAR S.A.	Santa Elena	Santa Elena	Canned

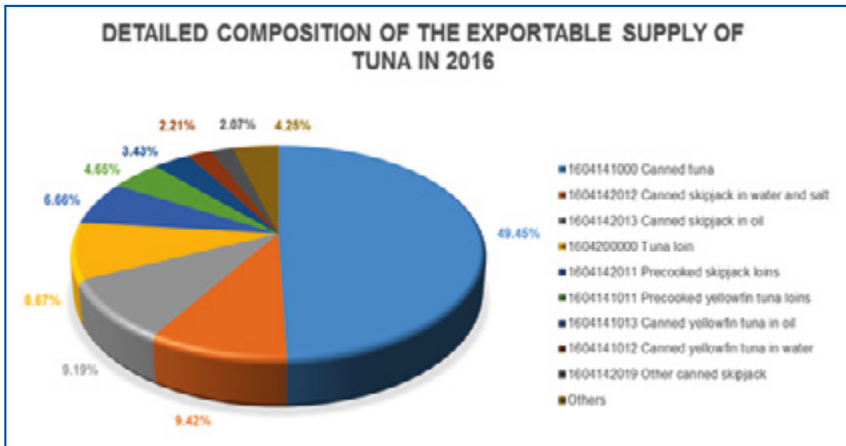
Source: CNP-CEIPA

2.3 International Trade of Tuna

The tuna processing industry is directed towards the international market, with only 10% of sales going towards the domestic market.

The tuna exportable supply is mainly composed of canned tuna and tuna loins. In 2016, both products represented 80.02% and 19.98%, respectively. The Ecuadorian exportable offer of canned tuna and tuna loins included the following products (Figure No. 3):

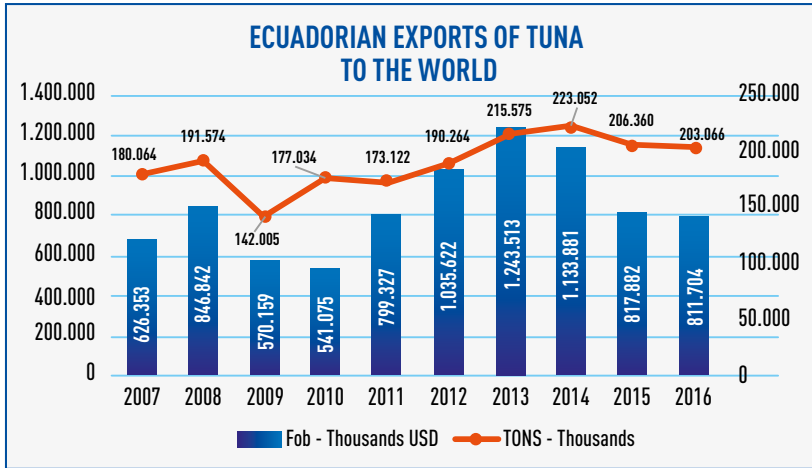
Figure No. 3



Source: Central Bank of Ecuador
Prepared by: Ministry of Foreign Trade

From 2007 to 2016, the exports of the entire tuna sector (cans and loins) presented an average growth of 6.37%, with the highest value of exports registering in at USD 1,243 million in 2013. Although the total volume of exported tuna in 2014 surpassed that of 2013, the highest value of exports registered remains the 2013 figure of USD 1,243 million (Figure No. 4). Canned tuna (1604.14) was the most exported product since 2007 until 2016 and had an annual average growth of 13.27%.

Figure No. 4



Source: Central Bank of Ecuador
Prepared by: Ministry of Foreign Trade

In 2016, Ecuador was ranked as third global exporter of canned tuna and tuna loins, representing 9.74% of the total worldwide exports. Only Thailand and China were positioned before Ecuador (See Chart No. 2). It is important to mention however, that in that same year, Ecuador was the second global exporter of canned tuna and represented 12.13% of the worldwide exports.

Chart No. 2

Exporters of Canned Tuna and Tuna Loins to the World in 2016			Exporters of Canned Tuna to the World in 2016		
Exporting country	Thousands USD	Participation	Exporting country	Thousands USD	Participation
Thailand	2,196,098	26.35%	Thailand	1,978,146	32.36%
China	892,575	10.71%	Ecuador	741,363	12.13%
Ecuador	811,704	9.74%	Spain	480,080	7.85%
Spain	599,422	7.19%	China	359,901	5.89%
Indonesia	281,593	3.38%	Indonesia	278,973	4.56%
Seychelles	260,926	3.13%	Seychelles	258,523	4.23%
Mauricio	259,664	3.12%	Mauricio	246,075	4.03%
Vietnam	237,777	2.84%	Netherlands	202,438	3.31%
Netherlands	225,679	2.71%	Vietnam	188,609	3.09%
Italy	195,461	2.34%	Philippines	179,168	2.93%
Rest of the world	2,374,370	28.49%	Rest of the world	1,200,198	19.62%
Total	8,335,269	100.00%	Total	6,113,474	100.00%

Source: Trade Map
Prepared by: Ministry of Foreign Trade

From 2007 to 2016, the value of tuna exports varied according to the destination. On average, Ecuador exported USD 643 million, with approximately USD 343 million going to the European Union (EU), USD 73 million to the United States of America, USD 46 million to Colombia, USD 26 million to Argentina, USD 27 million to Chile, among others.

Chart No. 3

Evolution of Canned Tuna Exports – 1604.14 per Destination Market (USD thousands FOB)						
	EU	US	COLOMBIA	ARGENTINA	CHILE	OTHERS
2007	220,418	59,073	26,731	14,826	14,095	40,487
2008	366,534	31,849	40,870	10,859	15,128	67,011
2009	158,348	28,234	26,264	10,400	6,930	104,427
2010	163,734	33,147	30,213	14,176	12,435	69,107
2011	263,639	78,390	34,187	23,645	35,963	122,009
2012	382,593	91,414	42,973	36,821	39,920	231,985
2013	563,320	106,391	63,045	34,482	54,305	210,314
2014	478,719	102,963	65,865	37,777	38,753	281,314
2015	398,081	100,927	60,476	41,145	28,988	77,233
2016	437,631	95,166	72,803	42,432	25,590	67,740

Source: Central Bank of Ecuador
Prepared by: Ministry of Foreign Trade

At the same time, an average amount of USD 199 million of tuna loins were exported, whereof approximately, USD 124 million went to the EU, USD 14 million to Argentina, among other markets.

Chart No. 4

Evolution Exports of Tuna Loins – 1604.20 per Destination Market (USD thousands FOB)						
	EU	ARGENTINA	BRAZIL	COLOMBIA	MÉXICO	OTHERS
2007	159,969	4,347	1,393	2,070	4,033	78,910
2008	209,461	3,641	2,731	1,067	3,581	94,110
2009	148,682	10,682	3,200	2,230	447	70,316
2010	137,217	14,680	2,174	2,225	1,090	60,879
2011	148,409	14,983	5,072	5,086	306	67,638
2012	135,401	20,931	5,395	1,195	715	46,278
2013	127,061	30,622	12,325	4,056	836	37,592
2014	66,131	12,942	14,673	4,328	-	29,580
2015	68,711	14,522	15,666	4,425	525	7,183
2016	34,701	13,292	7,528	7,017	2,285	5,518

Source: Central Bank of Ecuador
Prepared by: Ministry of Foreign Trade

For this same period, an amount of 141 thousand tons of canned tuna was exported.

Chart No. 5

Evolution of Canned Tuna Exports – 1604.14 per Destination Market (Tons)						
	EU	US	COLOMBIA	ARGENTINA	CHILE	OTHERS
2007	64.440	14.421	10.419	5.427	5.210	17.454
2008	84.429	7.692	12.264	2.962	4.190	16.846
2009	42.240	6.576	8.111	3.117	1.964	19.026
2010	43.785	7.788	8.893	3.599	3.503	15.429
2011	57.783	16.174	9.278	5.739	8.932	27.124
2012	69.747	16.018	10.423	7.792	8.833	44.026
2013	96.082	16.010	14.023	6.266	10.581	37.348
2014	100.082	16.087	15.687	8.575	8.574	46.499
2015	104.513	18.048	16.031	10.776	7.854	19.977
2016	109.140	18.073	18.791	10.663	6.922	16.928

Source: Central Bank of Ecuador
Prepared by: Ministry of Foreign Trade

Regarding tuna loins, an average of 45 thousand tons were exported.

Chart No. 6

Evolution Exports of Tuna Loins – 1604.20 per Destination Market (Tons)						
	EU	ARGENTINA	BRAZIL	COLOMBIA	MÉXICO	OTHERS
2007	38,955	2,053	667	1,353	1,730	20,842
2008	42,488	1,357	1,129	573	1,246	17,934
2009	39,731	3,725	1,351	1,416	150	14,806
2010	32,529	5,421	16,174	5,739	6,478	27,124
2011	29,452	4,857	1,678	1,349	92	13,116
2012	22,110	4,935	1,291	402	165	8,512
2013	20,815	7,338	2,252	1,147		7,182
2014	12,840	4,031	3,320	1,469	250	6,364
2015	17,498	4,647	4,976	1,749	150	2,645
2016	8,951	4,856	2,998	2839	614	2,027

Source: Central Bank of Ecuador
Prepared by: Ministry of Foreign Trade

The main destination for Ecuadorian tuna (canned tuna and tuna loins, respectively), from 2007 to 2016, was the EU, as showed in the following chart:

Chart No. 7

Evolution of Canned Tuna Exports – 1604.14 by Destination Market (% participation)						
	EU	US	COLOMBIA	ARGENTINA	CHILE	OTHERS
2007	58.68%	15.73%	7.12%	3.95%	3.75%	10.78%
2008	68.86%	5.98%	7.68%	2.04%	2.84%	12.59%
2009	47.32%	8.44%	7.85%	3.11%	2.07%	31.21%
2010	50.72%	10.27%	9.36%	4.39%	3.85%	21.41%
2011	47.26%	14.05%	6.13%	4.24%	6.45%	21.87%
2012	46.34%	11.07%	5.20%	4.46%	4.83%	28.10%
2013	54.59%	10.31%	6.11%	3.34%	5.26%	20.38%
2014	47.62%	10.24%	6.55%	3.76%	3.85%	27.98%
2015	56.32%	14.28%	8.56%	5.82%	4.10%	10.93%
2016	59.03%	12.84%	9.82%	5.72%	3.45%	9.14%

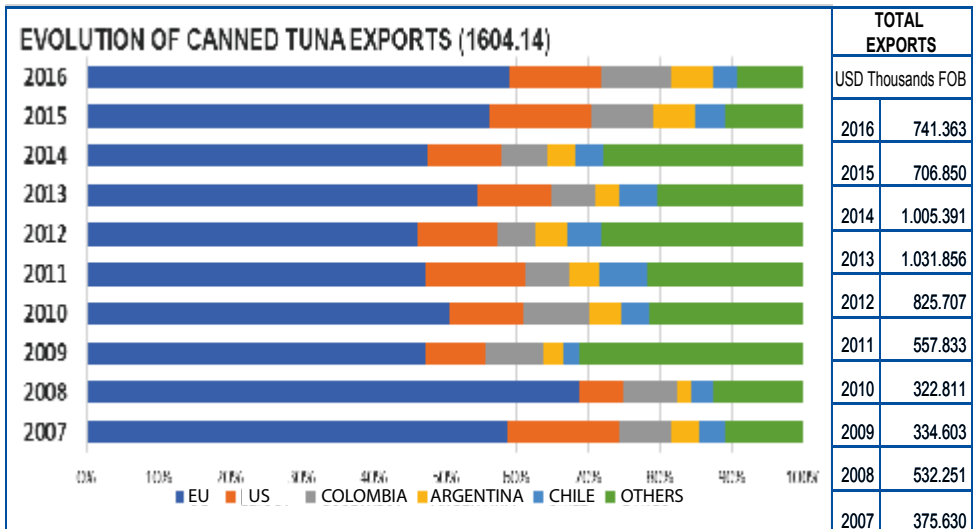
Source: Central Bank of Ecuador
Prepared by: Ministry of Foreign Trade

Chart No. 8

Evolution Exports of Tuna Loins – 1604.20 by Destination Market (% participation)						
	EU	ARGENTINA	BRAZIL	COLOMBIA	MÉXICO	OTHERS
2007	63.80%	1.73%	0.56%	0.83%	1.61%	31.47%
2008	66.58%	1.16%	0.87%	0.34%	1.14%	29.92%
2009	63.12%	4.53%	1.36%	0.95%	0.19%	29.85%
2010	62.87%	6.73%	1.00%	1.02%	0.50%	27.89%
2011	61.45%	6.20%	2.10%	2.11%	0.13%	28.01%
2012	64.50%	9.97%	2.57%	0.57%	0.34%	22.05%
2013	60.03%	14.47%	5.82%	1.92%	0.00%	17.76%
2014	51.47%	10.07%	11.42%	3.37%	0.65%	23.02%
2015	61.88%	13.08%	14.11%	3.98%	0.47%	6.47%
2016	49.33%	18.90%	10.70%	9.98%	3.25%	7.84%

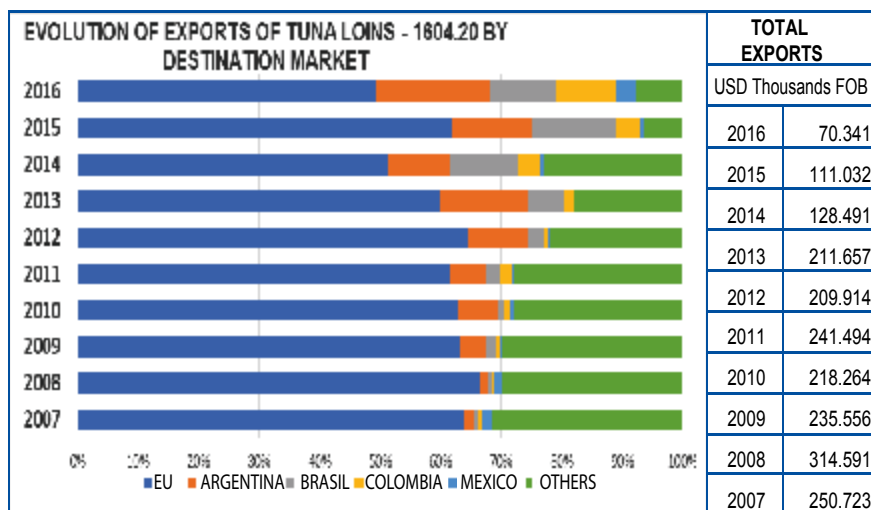
Source: Central Bank of Ecuador
Prepared by: Ministry of Foreign Trade

Figure No. 5



Source: Central Bank of Ecuador
Prepared by: Ministry of Foreign Trade

Figure No. 6



Source: Central Bank of Ecuador
Prepared by: Ministry of Foreign Trade

3. Health Benefits of Tuna

Tuna is an excellent source of nutrients for human consumption, such as: fatty acids, omega-3, high quality proteins, selenium and vitamin D. Most tuna species have between 1 to 5 grams of fat for each 100 gram portion, and less than 50 milligrams of cholesterol and sodium (PROECUADOR 2016, page 6)

Pregnant women or nursing mothers can consume a maximum of 170 grams per week of white tuna – albacore. (FDA and EPA 2004).

Furthermore, tuna consumption is recommended for preventing cardiovascular diseases, prostate cancer, immunological disorders and osteoporosis; for carrying out the late stage of pregnancy and for developing the neurological and cardiovascular systems of infants during the nursing period (FAO 2010).

“There is a dose-response effect of fish oil on blood pressure of -0.66 / -0.35 mm Hg / g of omega-3 fatty acids. The hypotensive effect may be stronger in hypertensive subjects and those with clinical atherosclerotic disease or hypercholesterolemia” (Morris MC, Sacks F & Rosner B. 1993, 88)

International consumption of tuna tends to increase because it is a healthy food, ready to eat and easy to prepare. People prefer canned tuna due to the tendency of consuming bio products with eco-labelling that passed through a traceability system of excellent quality (Ministry of Agriculture, Nutrition and Environment of Spain 2015).

Ecuadorian tuna is unique due to its organoleptic quality created by the cold water currents of the EPO. This makes EPO's tuna superior from those of the Central and West Pacific Ocean (CWPO), since EPO's tuna develops better muscles. Moreover, the appropriate manipulation given by the Ecuadorian fishers makes it a high quality raw material.

4. Sanitary Regulations

- Ministerial Agreement No. 227 – National Control Plan

Issued by the Ministry of Agriculture, Livestock, Aquaculture and Fishing, currently now as MAG, for the implementation of the New Version of the National Control Plan (PNC) developed by the National Fishery Institute (INP). The main purpose of the PNC is to ensure the safety of any fishery and aquaculture products that are meant to be exported. The PNC has been in force since September 1st, 2015.

The PNC establishes the functions for the National Coordination and services of the INP, lists of institutions to be included in the traceability chain of fishery and aquaculture products, coastal and seagoing vessels, primary processing companies, refrigeration plants, ice factories, maritime and inland transport, retailers, merchants, aquaculture input suppliers, processing and packaging companies, storing centers, certification protocols, procedure and criteria for the emission of sanitary certificates, among others.

The traceability system notes that the fishery establishments have to demonstrate the origin of procedures and destinations.

The sanitary certificate issued by INP guarantees that the fishery and aquaculture products have been captured, harvested, received, processed, stored, and shipped under the traceability chain, in accordance with equivalent conditions used by the countries with which Ecuador has trade relations, and are in conformity with the Codex Alimentarius standards.

- Agreement 241 – Minimum Sanitary Requirements

Agreement 241 was adopted by MAGAP (currently known as MAG), and has been implemented by the INP. It has been in force since July 5th, 2010, and establishes the minimum sanitary requirements that have to be met by the fishery and aquaculture industries in terms of:

a) Construction and building materials

- Production flowchart
- Delivery area for raw material
- Processing area
- Washing area
- Refrigeration and/or thermic rooms
- Pest/rodents protection
- Tools and equipment that are in contact with the product
- Residues and rubbish
- Use of potable and/or secure water
- Cleaning Utensils and chemicals
- Wastewater
- Transportation tanks
- Restrooms and changing rooms
- Cleaning and hygiene control of uniforms
- External environment
- Preserves
- Internal ice production
- Smoking plant
- Saltery
- Laboratory

b) Sanitary and Hygienic Requirements

- Hygiene of areas and equipment
- Pests and rodents control
- Staff training
- Water and ice use
- Reception of raw material

- Process control
- Residues and waste management
- Storage control
- Defrost control
- Preventive maintenance
- Input reception
- Parasites management
- Traceability and withdrawal of products

c) Specific Requirements for Canned Fish

- Canning control
- Traceability control of origin

d) Hazard Analysis and Critical Control Points (HACCP)

- System description
- Product description
- Users and consumers
- Process specifications
- Risk analysis
- Critical Control Points (CCP)
- Implementation of critical limits
- Monitoring of CCP
- Corrective measures
- Test procedures
- Records and documentation

e) HACCP Review

- Amendments
- Records and documentation
- Plan management
- Tools and equipment

- Inter-Ministerial Agreement No. 326 between MAGAP and MSP (INP and HACCP competences)

This Agreement was signed on the 30th of July, 2014, between MAGAP (currently known as MAG), and the Ministry of Public Health (MSP). It was implemented by the INP and the National Agency for Health Regulation, Control and Surveillance (ARCSA), with the aim of regulating and defining the competences of these institutions.

According to this regulation, the INP has to issue a HACCP certificate for the fishery and aquaculture processing establishments that intend to export products. This is a requirement asked by ARCSA for issuing and renewing the Good Manufacturing Practice (GMP) Certificate.

5. Environmental Regulations

Article 14 of the Ecuadorian Constitution declares as a public interest the preservation of the environment and the conservation of ecosystems.

Tuna fishing in Ecuador is managed under sustainability parameters, aimed to accomplish the national environmental regulations and, in certain cases, with the access requirements of specific export destinations.

Since 2007, the National Fishery Authority developed a process for identifying and introducing conservation measures and fishing management with the objective of promoting environmentally responsible exports, through the following actions and regulatory provisions:

Development Fishery Law of Ecuador – Regulation of the Ecuadorian Fishery Law – Legal Regulation to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing

The Ministerial Agreement No. 228, from August 28th, 2014, includes the national definition of illegal, unreported and unregulated fishing (IUU), given before the reforms to the Fishing and Fishing Development Law and its regulation. By Executive Decree No. 852 - Amendments to the General Regulation of the Fisheries and Fisheries Development Law, published in Official Gazette No. 694, from February 19th, 2016, the reforms of the aforementioned Regulation were implemented.

The National Plan of Action to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing was published within Ministerial Agreement No. MAGAP-M.A.G.A.P.-2015-001-A, on September 17th, 2015. The main objective of this Plan is to define the national policies for fighting IUU fishing in the jurisdictional waters of Ecuador and the adjacent high seas. This document is consistent with the International Plan of Action to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing issued by the FAO, along with other regional and international fishery regulations.

Code of Conduct for Responsible Management of the Ecuadorian Tuna Value Chain

The Code of Conduct for Responsible Management of the Ecuadorian Tuna Value Chain defines the commitments between the operators involved in the tuna value chain in accordance with responsible management, along with responsible fishing and the supply of tuna products responsibly managed in the market. This Code is based on the FAO Code of Conduct for Responsible Fishing, its Guidelines for Eco-Labeling and other international regulations.

Despite the fact that this document is of voluntary application, a number of actors would directly fall under its scope: ship-owners, input suppliers, retailers, and competent authorities from the local and central government.

Its objectives are:

- To increase the level of competition within the tuna value chain, through alignment and compliance with good practices of responsible fishing by all the involved operators; and,
- To strengthen the relationship and capacity for management and negotiation between the key players in the tuna value chain, differentiated in the national and international market for compliance with the Code of Conduct of the Tuna Value Chain.

The Government and the tuna sector are fostering the development and implementation of a Sectorial Brand for the Ecuadorian tuna industry that will be based on the Protocol of the Code of Conduct for the Responsible Management of the Ecuadorian Tuna Value Chain. The objective of the Sectorial Brand is to demonstrate at the international level Ecuador's commitment towards sustainability when exporting tuna.

Tuna Seasonal Prohibitions

This is a measure framed within the responsible management of tuna capture that applies during one of the following two periods: from late July to late September and from mid-November to mid-January.

Export and Import Control – Traceability, Monitoring, Control and Surveillance System

The Ecuadorian certification system for imported and exported products has allowed the identification of potential risks when capturing and trading fish products. This system is complemented with the national legislation that demands the compliance of certain procedures, such as the declaration of internal captures and ministerial agreements for each establishment.

This system is strengthened through the compliance of international laws and regulations that derive from Regional Fisheries Management Organizations, the EU, the United States and South American countries; and guarantees that the imported fishery products come from legal activities certified by the flag State of each vessel.

According to the regime of certification of captures, the Ecuadorian fishing authority has issued eighteen thousand eight hundred and sixty eight (18,068) certifications for exported products during the last 3 years. These documents allowed the entry of Ecuadorian fishery products to markets such as Peru, the EU, Ukraine, China, Costa Rica, Russia, among others.

Implementation of the Traceability, Monitoring, Control and Surveillance System

It has 252 fishing inspectors who control everything from fishing ports to processing plants. They are currently working on:

- Training of inspectors in charge of procedures and the application of the instruction guidelines related to the compliance of their activities (application of the instruction manual of inspection with risk analysis);
- Data processing of the information and internal processes that guarantee traceability; and,

- Strengthening of the Command Center and Satellite Control.

National Action Plan for the Conservation and Sustainable Management of Tuna Industrial Fisheries (PAN Atun)

The World Wildlife Fund (WWF) – Ecuador – and some Ecuadorian tuna enterprises are implementing the Fishery Improvement Project (FIP), with the objective of reaching the sustainability standard given by the Marine Stewardship Council (MSC).

The PAN Atun resulted from the implementation of the FIP, through an inclusive strategy that involves all the actors within the tuna value chain.

The creation process of the PAN Atun began on the 23rd of February, 2017

6. Labor and Social Regulations

The current Constitution establishes the payment of a dignified minimum wage that covers at least the basic needs of a working person and his/her family, as well as the eradication of all forms of exploitation and, above all, child labor.

In 2016, the minimum wage of the tuna sector including social benefits, was USD 512.33 per month. The sectorial minimum wage was set at 4% above the unified basic salary and is considered among the highest in Latin America.

In order to avoid child labor in the fisheries sector, 481 control activities were completed, and more than 15,000 people were trained through seminars and home/enterprises visits. (2016)

Ecuador applies the following labor norms:

Chart No. 9

NATIONAL AND INTERNATIONAL LEGISLATIONS	OBJECTIVE
<p>Agreement 112 related to the minimum age of admission to conducting fishing work, 1959.</p>	<p>This Agreement establishes that children under 15 years old cannot provide services on board any fishing vessel. Occasionally, they may take part in on board activities during scholar vacations and on a condition that such activities:</p> <ul style="list-style-type: none"> • Are not harmful for their health or normal development; • Are not of such nature that may prejudice their attendance to school; and, • Do not have a commercial benefit. <p>Minors under the age of eighteen years may not be employed or work as firefighters, stokers or machine cutters on</p>
<p>Agreement 126 on crew accommodation (fishers) of 1966.</p>	<p>It regulates the accommodation of the crew in vessels which have a size that spans from 13.7 un to 24.4 meters' length.</p> <p>Before beginning the construction of a fishing vessel, the modification or reconstruction of the on board crew accommodation has to be approved by the competent authority.</p>
<p>Child Labor Eradication Project (PETI) 2014-2017</p>	<p>It carries out awareness-raising and inspections to prevent child labor in the country's 24 provinces.</p> <p>It includes an inter-institutional Committee for the Eradication of Child Labor, which will:</p> <ol style="list-style-type: none"> a. Define the public policy of protection against all forms of child labor exploitation; b. Carry out comprehensive inspections regarding the prohibition of child labor; c. Establish penalties in case of non-compliance with the regulations regarding child labor, d. Generate national statistics related to child and adolescent labor; and e. Monitor compliance with regulations regarding the work of adolescents in legal capacity to work and sanction their non-compliance.
<p>Organic Code on Labor (In force since the 16th of September, 2005. Last modified on May 19th, 2017)</p>	<p>This code regulates the relationship between employers and employees. It is applicable to the diverse modalities of work and working conditions.</p> <p>Regarding the fishing sector, the code forbids male and female child labor of persons under the age of 18, due to the fact that these activities are likely to harm their health, safety or morality.</p> <p>This Code also establishes the security, hygiene, and aid posts conditions.</p>
<p>Resolution No. C.D. 333 - Regulation for the Workplace Risk Audit System (In force since October 7th, 2010)</p>	<p>The Resolution regulates the technical audit procedures for the compliance of norms related to the prevention of labor risks, and directed to employers and employees that are subject to the regime of Social Security.</p> <p>Auditors will request companies the following information: its policy, manual, planning, internal regulations, organization, verification and continuous improvement of the system of management of occupational health and safety; identification, measurement, evaluation, control, environmental and biological monitoring of occupational risk factors; working instructions for immersion in water; among others.</p>

7. International Regulations

Ecuador has been very proactive when implementing provisions from international agreements and other regulations regarding fishery control and management, especially from those agreements which Ecuador is a party of.

Agreement on the International Dolphin Conservation Program (AIDCP)

This Agreement entered into force since February 1999 and focuses on the protection of dolphins in the tuna fisheries of the EPO. It is implemented through the IATTC and applies the Dolphin Safe Certificate, which is part of the requirements included in the Certification Guide of Origin and in the IUU Fishing Guide. Ecuador ratified this Agreement on February 9th, 1999; its objectives are: a) To progressively reduce to zero the incidental mortality of dolphins in the purse-seine tuna fishery by establishing annual limits; b) To seek environmentally appropriate methods to catch large yellowfin tuna not associated with dolphins; and c) To ensure the long-term sustainability of tuna stocks and marine living resources, related to this type of fishery.

Inter-American Tropical Tuna Commission (IATTC)

The Convention for the Strengthening of the Inter-American Tropical Tuna Commission, established by the 1949 Convention between the US and Costa Rica (also called the Antigua Convention), is responsible for the fishery management system of tuna and other marine species of the EPO. Ecuador subscribed this Agreement on April 14th, 2004.

The objective of this Commission is to maintain the stock of yellowfin, bonitos and other species of fish that are captured by tuna vessels in the EPO, and to cooperate in the compilation and interpretation of data and information in order to help the maintenance of their population.

South Pacific Regional Fisheries Management Organization-SPRFMO

It is an intergovernmental organization committed to the long time conservation and sustainable use of the fishery resources from the South Pacific Ocean in order to safeguard the marine ecosystems of Jack mackerel, giant squid and -to a lesser extent- the deep-sea species often associated with seamounts in the Southwest Pacific.

Currently, the Commission is composed by 15 members from Asia, Europe, America and Oceania. Ecuador is part of this Commission.

Ecuador also collaborates with the following Regional Fishery Management Organizations, to which it is a cooperating non-party:

- Western and Central Pacific Fisheries Commission-WCPFC; and,
- Commission for the Conservation of Antarctic Marine Living Resources.

Agreement for the Implementation of the Provisions of the United Nations Convention on the Law of the Sea of 10 December 1982 relating to the Conservation and Management of Straddling Fish Stocks and Highly Migratory Fish Stocks (commonly known as the “1995 New York Agreement”)

This Agreement establishes the legal frame for the conservation and management of living marine resources in areas subject to national jurisdiction and open seas. It contains the specific provisions concerning straddling and highly migratory fish stocks.

The Agreement entered into force in 2001 and currently has 77 State parties. To be a party in this instrument confirms, at an international level, the commitment of our country with responsible fishing. Ecuador ratified this Agreement on December 7th, 2016.

This Agreement ensures the conservation and sustainable use of straddling fish stocks and highly migratory fish stocks through the effective implementation of the relevant provisions of the United Nations Convention on the Law of the Sea.

The Convention on the Law of the Sea of December 10th, 1982 entered into force on November 16th, 1994, when the 60th ratification document was deposited. The Convention has been ratified by 168 Parties. Ecuador ratified the Convention on September 24th ,2012.

8. International Certifications of this Industry



Best Aquaculture Practices: Demonstrates the commitment with the environment, social integrity, animal and consumers health.

British Retail Consortium Food Safety Standard (BRC): It guarantees the standardization of quality, security and functioning criteria, and the compliance of legal obligations and consumer protection.

Business Alliance for Secure Commerce: It is an international business alliance that promotes safe trade in cooperation with Governments and international organizations.

Dolphin safe: Fishery activities have been done without harming dolphins.

Halal: Means allowed, guarantees that products directed to Muslims comply the requirements demanded by the Islamic law.

International Food Standard (IFS): Applies for processed products during the first packaging process.

ISO 9001:2008: Based on the accomplishment of a quality system centered on administrative and optimization elements from the resources of an enterprise.

ISO 22000: It is the international regulation on food safety management systems.

The Orthodox Union for Kosher: is a highly credible certification that guarantees that a certain product is made according to religious Jew norms.

Occupational Health and Safety Assessment Series – Oshas 18001: Establishes the minimum requirements for the best practices in Occupational Safety and Health Management.

9. Conclusions

- Ecuador is one of the main exporters of high quality canned tuna and tuna loins in compliance with the highest international sustainability standards.
- The tuna industry is one of the main Ecuadorian industries in comparison with the income of the fishery industry (65.48%) and the non-oil exports (8.71%)
- Labor and social policies, adopted by the tuna sector, have generated a vast number of jobs (24,000), with an important participation of women in the processing chain of tuna.
- The tuna sector has a minimum wage over the basic Ecuadorian wage, paying a value of USD 512.33 per month plus law benefits, locating this wage among the highest in Latin-American.
- As law policies, actions have been taken into account for avoiding child labor in the fishery sector. In 2016, 481 supervisions were made and more than 15,000 people have been trained through seminars and visits.
- The tuna sector has taken several actions, with the support of the Government, for accomplishing and implementing sustainability norms related to production and export of canned tuna and tuna loins, for guarantying safety and the fight against IUU fishing.

10. References:

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- Tuna benefits from FAO, PRO ECUADOR, FDA and EPA.
- Tuna capture statistics for FAO.
- Ecuadorian Canned tuna enterprises – CEIPA and CNP
- Trade statistics from TRADEMAP.
- Tuna Country File, March 2017 done by DG SANTE.
- Reports on fishing capture since 2010 to 2016 from IATTC.
- Safety regulations from CNP.

- International regulations from CNP.
- Environmental regulations – National Policy on the Export of Ecuadorian Green Products: Cocoa, Chocolate and Sustainable Fishing (2015), from UNCTAD.
- Labor and social regulations from the International Labor Organization and the Ministry of Labor.
- Annual Review of the Generalized System of Preferences granted by the US to Ecuador.

11. Glossary:

AIDCP: Agreement on the International Dolphin Conservation Program

ARCSA: National Agency for Health Regulation, Control and Surveillance

BRC: British Retail Consortium

CEIPA: Ecuadorian Chamber of Tuna Industrialists and Processors

CNP: National Chamber of Fishery

CWPO: Central and West Pacific Ocean

DG SANTE: Directorate General for Food and Health Safety

EPA: United States Environmental Protection Agency

EPO: Eastern Pacific Ocean

EU: European Union

FAO: Food and Agriculture Organization

FDA: Food and Drug Administration

FIP: Fishery Improvement Project

GMP: Good Manufacturing Practice

HACCP: Hazard Analysis and Critical Control Points

IATTC: Inter-American Tropical Tuna Commission

IFS: International Food Standards

ILO: International Labor Organization

INEN: Ecuadorian Institute of Normalization

INP: National Fishery Institute

ISO: International Organization for Standardization

IUU: Illegal, unreported and unregulated fishing

MAE: Ministry of Environment

MAG: Ministry of Agriculture and Livestock

MAGAP: Ministry of Agriculture, Livestock, Fishery and Aquaculture

MSC: Marine Stewardship Council

MSP: Ministry of Public Health

PAN Atun: National Action Plan for the Conservation and Sustainable Management of Tuna Industrial Fisheries

PETI: Child Labor Eradication Project

PNC: National Control Plan

SPRFMO: South Pacific Regional Fisheries Management Organization

USA: United States of America

UNCTAD: United Nations Conference on Trade and Development

WCPFC: Western and Central Pacific Fisheries Commission

WHO: World Health Organization

WTO: World Trade Organization

WWF: World Wildlife





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