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Implementing CARICOM's Common Fisheries Policy: Increasing Countries' Economic and Social Benefits

Executive Summary

Each CARICOM State derives varying levels of economic and socio-economic benefits from their respective coastal and marine fisheries resources, some of which are shared. Currently, most States allow open access to their fisheries. In addition, there is no agreement amongst the countries pertaining to the accessing of the region's fisheries resources, in particular those that are shared. Continuation of such uncoordinated open access to these resources, despite regulated fishing in some states, can lead to overfishing and severe resource depletion. It will also result in reduced harvest levels triggering food and nutrition insecurity, lower export earnings. Fishing communities and rural areas in particular will experience quality of life losses. The CARICOM Common Fisheries Policy (CFP) will foster greater intra-regional cooperation and opportunities for increased benefits in individual states, and collectively across States, while promoting the long term resource sustainability.

The anticipated designation of the CRFM as the Competent Agency for the CARICOM CFP will facilitate the implementation of the Agreement on the CFP. It will provide for countries' access to a cadre of highly skilled and competent fisheries scientists to advise and guide the design and implementation of sustainable fisheries resource management strategies. However, the CRFM's technical capacity will have to be improved.

The strengthening of the technical capacity of the CRFM Secretariat will enable the CRFM to more adequately discharge the additional obligations associated with serving as the Competent Agency for the CARICOM CFP.

In contrast, maintaining the current accessing arrangements will ultimately lead to lower economic and socio-economic returns stemming from: fragmented governance; inadequate management; depleted resources caused by overfishing; pollution and degradation of the marine ecosystem; and consequential reduction of harvests.

Timely action is urged given the 2003 Heads of Government decision on a Common Fisheries Regime, the 2009 decision of the CRFM Ministerial Council on the elaboration of a Common Fisheries Policy, as well as the formal endorsement of the Castries (St. Lucia) Declaration on IUU Fishing and the Common Fisheries Policy by the CRFM Ministerial Council in 2010 and 2011 respectively. All stakeholders should cooperate on the expeditious adoption and implementation of the CFP.



Introduction

The Challenge: Coastal and marine waters of CARI-COM states are a source of economic and socio-economic benefits to the respective countries in the fisheries, tourism and industrial (oil/gas) sectors.

Fisheries contribute immensely to improved food and nutrition security, export earnings, and enhanced rural wellbeing, to varying degrees across the Member States of the Community. Harvests from the fisheries resources are an important food supply source in all states. In addition, our fisheries resources serve as a vital component to activities such as snorkeling, diving, sport fishing, mangrove and reef biodiversity

Box 1: Overview: *Implementation of the CFP will promote the optimum sustainable utilisation of the fisheries resources in the region. This will serve to maintain an equitable balance between the use of the fisheries resources for food supply and export earnings, as well as enhance the contribution of these resources to the tourism sector and ecosystem conservation.*

tours within the tourism sector in many of our island nations and some of our coastal States.

Improved governance and effective management of our fisheries resources are critical not only to the maintenance of food and nutrition security but also to the diversification and further development of the sector, the continuation and strengthening of the linkages with the tourism sector, and improving trade competitiveness and profitability. In essence a viable and healthy fisheries sector enhances the national food supply and provides stable employment and welfare benefits to the fishing community. It also delivers economic benefits to tourism and environmental benefits related to a healthy coastal and marine ecosystem. Implementing the CFP will serve, individually and collectively, to catalyse the attainment of increased economic and social benefits from the coastal and shared migratory natural resources.

Implementation of the CFP will promote the optimum sustainable utilisation of the fisheries resources such that there is maintained an equitable balance between the use of the fisheries resources for food supply and export earnings, as well as the contribution of these resources to the tourism sector and ecosystem conservation.

Postponements in the launching the CFP will likely retard the reaping of higher levels of benefits from the fisheries resources, promote unbalanced linkages between fisheries and tourism and contribute to damage of the ecosystem.

The Context: Open access exists in most countries. Fishers practice multi species operations with boats generally varying between 3-10 metres in length and powered by oars, sails, out-board or in-board motors. In general, artisanal fishing practices are similar, with some differences by country and by resources targeted. Semi-industrial and industrial scale fisheries exist in some states such as Guyana, Suriname and Trinidad and Tobago. Countries establish national fisheries management plans (FMPs) that are uncoordinated with those of neighbouring countries, despite shared trans-boundary resources or, in some instances, with the status of the resource unknown. This lack of harmonisation is likely to result in the overfishing of some fisheries resources and ultimately to reduced economic benefits for the fisheries and tourism sectors as well as community welfare loss.

Critical Policy Issues: Adoption of the CFP fosters critical issues pertaining to the fisheries resources, namely:

1. Individual and collective harvesting of the respective fisheries resources at levels that allow for their long term sustainability and protection of the marine environment, fostered by enhanced intra-regional coordination and management of these resources;



2. Facilitating increased levels of production and harvest across all countries;
3. Improved food and nutrition security and socio-economic welfare of fishers and fishing communities;
4. Greater foreign exchange earnings from higher levels of traditional exports and new export markets;
5. Strengthened national fisheries management capability to monitor harvest of and regulate access to the fisheries resources, through improved intra-regional technical cooperation;
6. The implementation of a regional system for co-operation on the management, monitoring and effective control of illegal, unreported and unregulated (IUU) fishing;
7. Diversification and development of under-utilized resources and value-added activities;
8. Collaboration with neighbouring Third Party states on the management measures for selected fisheries resources in view of the shared resource characteristics.

Policy Options: In light of the above circumstances, Governments and fisher folk have some clear choices pertaining to the continued harvesting of the fisheries resources in Caribbean waters. These are:

- **Maintain fishing as currently done:** however this will result in a less than optimal use of the region's fisheries resources. Another consequence is the likelihood of the resources being depleted in the not too distant future on account of overfishing and other sub-optimal harvesting practices. In addition, the current situation allows for the continuation of undue influence and the imposition of fisheries regulation decisions - and as a consequence the determination of derivable benefits - by treaties and global agencies such as the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) and The International Commission for the Conservation of Atlantic Tunas (ICCAT). Maintaining current fishing practices also increases the region's vulnerability to WTO trade restrictions;
- **Adopt and implement the CARICOM CFP:** allowing for greater intra-regional cooperation among Parties to the CFP. This will likely result

in the long term sustainable utilisation of the fisheries resources and greater opportunity for accessing and sharing technical assistance amongst CFP partners. It will also serve to strengthen the linkages between the fisheries and tourism sectors;

- **Designate the CRFM** as the Competent Agency for the CARICOM CFP as an integral component of its implementation, facilitating the delivery of technical assistance to Parties and the implementation of other CFP promotional measures. This will require appropriate and timely enhancement of the technical capacity of the CRFM Secretariat to permit its efficient discharge of the Competent Agency responsibilities.

Policy Recommendations

Adoption and implementation of the CFP, by the CARICOM States and other stakeholders, will re-



ward every country in the long run. As country circumstances vary so do benefits. Consequently, the recommendations are:

1. Adopt and implement the CARICOM Common Fisheries Policy without undue delay;
2. Designate the CRFM to perform the role of the Competent Agency of the CARICOM CFP, to provide technical assistance, and advice and other functions as in the Agreement on the CFP;
3. Strengthen the technical capacity of the CRFM Secretariat as appropriate to permit the CRFM's efficient discharge of the responsibilities of the Competent Agency for the CARICOM CFP, and

4.Proceed expeditiously with the implementation of policy recommendations 1), 2) and 3) above.

In 2003 the Heads of Government decided to elaborate a Common Fisheries Regime. In 2009 the CRFM Ministerial Council (the Ministers responsible for Fisheries) directed that a Common Fisheries Policy be elaborated. The CFP is envisaged as the umbrella that will facilitate the design and implementation of a common fisheries regime. Operationalising of the CFP in a timelier manner will reinforce respective national benefits derived from fisheries as outlined below.

Thumb nail sketch of economic and socio-economic benefits now obtained from Fisheries.

The country circumstances and experience summarized below are indicative of the benefits that now flow from fisheries and related activities. It is anticipated that the implementation of the CFP will positively impact these developments.

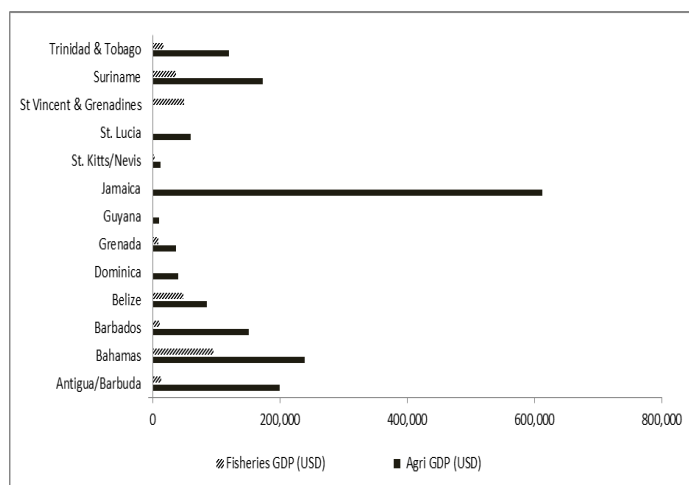
Antigua/Barbuda: *Targeted resource:* Finfish (various species), conch and lobster; Current economic and welfare benefits: There were about 950 fishers in Antigua in 2010, around 2% of the island's labor force, while on Barbuda 1 in every 4 persons is directly dependent on fishing. The sector serves as an economic safety net when jobs in tourism or construction are scarce. In 2010 about 5.1 million lbs. of seafood were landed, with gross value of USD 12.9 million, about 50% of the agricultural GDP or 2% of the national GDP. The European Union is a key export market but the contribution of fisheries to domestic exports decreased from 25% in 1989 to 3% in 2009. Recreational fishing is linked to tourism activities such as snorkeling and diving. Critical management issues include: collaboration on the effective management of shared stocks; monitoring and preservation of endangered resources and fragile ecosystems.

Bahamas: *Targeted resource:* The spiny lobster, the queen conch, snapper species and the Nassau grouper. Current economic and welfare benefits: The spiny lobster comprised 82% of the landings in 2006, gross value of USD 75 million. About 90 % of the landings are exported. Some 9000 fulltime fishers operate using about 4000 vessels, some of which work in conjunction with a mother ship. Tourism related activities include recreational fishing, snorkeling and diving.

Critical management issues include: seasonal and size restrictions for lobster fishing; research on gear selectivity for lobster and conch fishing.

Barbados: *Targeted resource:* These include: shallow reef fish, deep slope and bank reef fish, coastal pelagic, oceanic or migratory pelagic and flying fish, which account for over 50% of the landings in most years. Current economic and welfare benefits: Fisheries is of dual importance: as a source of food and as an economic link to tourism. Fishers are engaged full-time during the flying fish season and part-time the rest of the year. 'Day-boats' and open boats are mainly used. Game fishing, snorkeling and diving are tourism related activities promoted while the flying fish is a prominent tourism symbol. Critical management issues include: promotion of shared responsibility among all fishery industry stakeholders; enhanced participation in ICCAT in order to prevent over exploitation of the targeted resources.

Figure 1: Comparison of Agricultural GDP and Fisheries GDP for Selected Countries. Compiled using data from FAO: Various years



Belize: *Targeted resource:* Lobster, conch and finfish (various species) are the main local fisheries commodities. There is a recent push to diversify into a sea cucumber fishery. There is also a high seas fishery managed via an open registry. Current economic and welfare benefits: Gross seafood export earnings increased from USD 10.8 million to USD 12.8 million or by 20% from 2011 to 2012. In 2012, the new sea cucumber fishery, earned USD 0.25 million. In 2011, the number of licensed fishers was 2582, up from 1650 in 1996, using 600 - 700 boats. Critical management issues include:

The promotion of designated marine reserves to support the sustainability of the reef-associated resources, a concept embraced by fishers, and enhanced participation in ICCAT for maintenance of the open registry.

Table 1. Number of persons employed in direct production in the marine capture fisheries and aquaculture in the CRFM region in 2010.

MEMBER STATES	Number of persons employed in direct production in the marine commercial capture fisheries ¹ (2010)	Number of persons employed in direct production in aquaculture (2010)
Anguilla	300	0
Antigua and Barbuda	1 521	2
Bahamas	9 000	2
Barbados	2 200	0
Belize	2 472	90
Dominica	1 373	30
Grenada	2 805	2
Guyana	6 500	100
Haiti	4 000	278
Jamaica	19 001	183
Montserrat	75	0
St. Kitts and Nevis	1 086	0
St. Lucia	2 458	92
St. Vincent and the Grenadines	980	0
Suriname	3 658	99
Trinidad and Tobago	4 500	53
Turks and Caicos Islands	288	20
Totals	62 217	951

The figures presented represent the Member States best estimate of number of marine capture fishers in the Member State

Dominica: *Targeted resource:* Small coastal pelagics (ballyhoo, jacks and sardines), reef fish (parrot fish, groupers and snappers) and migratory pelagics (tunas, dolphin fish, marlin, flying fish). Current economic and welfare benefits: Some 800 registered fishers operate primarily part-time with about 400 boats. Approximately 1.5 million pounds of fish (various species) were estimated landed in 2011. There is potential for increased landings of deep slope large pelagic fish and as well as the development of a new fishery targeting the diamondback squid. Critical management issues include: Combating the invasive ‘Lion Fish’ recently discovered in Dominican waters; coopera-

tion with Martinique, Guadeloupe St. Kitts/Nevis and St. Vincent and the Grenadines to test new fish aggregating technologies envisaged to contribute to increased harvests.

Grenada: *Targeted resource:* Small coastal pelagics, large migratory pelagics, demersals, lobster and conch. Current economic and welfare benefits: An Artisanal Fisheries Development project in the 1980s catalysed a substantial growth in the fisheries sector evidenced by multi-million dollar investments in on-shore infrastructure, fishing vessels and technology, personnel capacity enhancement and quality assurance. In 2008, the now commercial scale operations resulted in estimated gross fish landings of 3.1 million lbs. valued at USD 11.5 million. For the same year, exports were estimated at approximately 1.1 million lbs. with related foreign exchange earnings at about USD 4.0 million. In 2010, approximately 650 vessels were involved. Critical management issues include: Management of vulnerable stocks to minimize depletion and stimulate rebuilding, including: improved management of queen conch in accordance with CITES recommendations, improved cooperation with ICCAT, and the promotion of catch and release sport fishing tourism activities.

Guyana: *Targeted resource:* Five different types of fisheries can be found in Guyana, namely: industrial, semi-industrial, inshore artisanal, inland and aquaculture. Collectively these target prawns, sea bob, snappers and other fin fish species (bangamary and croakers) with small amounts of squid and lobsters as by catch. Current Economic and welfare benefits: In 2012 the industrial and semi-industrial fisheries consisted of 125 trawlers, 8 large shrimp and fish processing plants, as well as supporting infrastructure including wharves, dry docking facilities and ice/freezing plants. Vessels can be at sea for as many as 4-6 weeks targeting prawns and penaeid shrimp.

The artisanal fishery comprises about 1200 vessels. The crew size varies from 2 to 6 persons who are at sea from 12 hours to six days, depending on the species being targeted and the size of the vessel which can range from 15 to 50 feet in length. Overall production was approximately 97,000 lbs. in 2011. Critical management issues include: Implementation of IUU measures to facilitate exports to the EU; and developing international management performance standards for the sea bob fishery.



Haiti: *Targeted resource:* These include lobster, conch, shrimp, octopus and various species of fin fish. Current economic and welfare benefits: In 2003 the number of fishers in Haiti was estimated at 27,000 with 21,000 (60%) of these being full-time. The estimate of number of fishers in 1985 was 11,000. The increase was likely influenced by factors such as open access to the resource, rising poverty and unemployment, absence of resources to control access and inadequate regulatory policies or capacity. The fishing fleet comprises about 5,500 dugout canoes and 2,500 commercial vessels. In 2003, annual catch weight was estimated at 13.2 million lbs. for marine fish and 660 thousand lbs. for inland fish, collectively valued at USD 30 million. Exports, consisting of lobster, conch, shrimp, octopus and crab were estimated at between 660 thousand lbs. and 1.1 million lbs. annually and valued at between USD 6-7 million. Exports to markets in the European Union and the United States are constrained because of nonconformity with required sanitary standards but exports to the Dominican Republic continue. Critical management issues include: Stemming the depletion of the resource and fostering its rehabilitation; the promotion of aquaculture; and improved management of queen conch in accordance with CITES recommendations.

Jamaica: *Targeted resource:* These include coastal pelagics, off shore pelagics, deep slope snappers and other fin fish, spiny lobsters and shrimp. Current economic and welfare benefits: The fishery is mainly artisanal in which some 21, 400 registered fishers operated in 2011 using open boats. About 9000 vessels operate but only two thirds of these were registered in March 2012. A small industrial fishery consists of vessels 12 m or larger. Jamaica is strong in aquaculture production. Total marine and aquaculture fish production was estimated at 35.3 million lbs. in 2010, down from 46.3 million

lbs. in 2006. Ornamental fish production is an emerging aquaculture activity, particularly for inner-city communities. Critical management issues include: The rehabilitation of various fisheries resources and the promotion of sustainable levels of harvesting; promotion of aquaculture; and the development of an offshore large pelagic fishery.

Montserrat: *Targeted resource:* Coastal pelagic, offshore pelagic and demersal fish. Current economic and welfare benefits: Continuous volcanic activity for 16 years has severely curtailed fishing and the fisheries resource. Yet, some 150 part-time fishers continue to operate with 38 boats. They landed about 53,000 lbs. of fish in 2010, a 50% reduction in the total annual fish catch since 2005. Critical management issues include: Protection and conservation of the marine environment and ecosystem: volcanic activity has limited fish landing sites to 2; improvement of fish landing and distribution facilities: the absence of infrastructure has restricted fishing activities to between 2-6 hours daily.

St. Kitts/Nevis: *Targeted resource:* These are the queen conch, the Caribbean spiny lobster, small coastal pelagic, large or oceanic pelagic and reef/bank and slope fisheries. Current economic and welfare benefits: Five major landing sites in St. Kitts are served by 70% of the 400 odd boats being operated by approximately 700 fishers, about 30% on a full-time basis. In Nevis there are about 300 fishers with 70% being full-time. The large pelagic fish are targeted by about 25 commercial fishers using 15 vessels as well as by sport fishermen. A total of 613,000 lbs. of fish were caught in 2010. Critical management issues include: The promotion of increased landings in the coastal pelagic fishery; promotion of stock recovery in the reef and lobster fisheries.



St. Lucia: *Targeted resource:* These include coastal pelagic, migratory pelagic, and demersals. Current economic and welfare benefits: In 2011 there were 643 registered vessels on average 7-8 meters long. These were operated by 2502 registered fishers. For the same year, 72% of the fish landings consisted of offshore migratory pelagic fish and occurred during



the months of December to May. Coastal pelagic and demersal fish comprise the remainder of the fish landings which totaled approximately 3.7 million lbs. for the year 2011. The multi-species nature of the fishery influences vessels being equipped with multiple gears for fishing trips that last from 3-8 hours. There is an established culture of tourism affiliated activities through fish festivals and selected village parties on Friday nights. Critical management issues include: The promotion of sports fishing for large pelagic fish; a sustainable level of harvesting; and cooperation with other Caribbean states and ICCAT on the management of large pelagic resources.

St Vincent and the Grenadines: *Targeted resource:* These include coastal pelagics, migratory pelagics, demersals, lobsters, conch, turtles, whales and porpoises (traditionally fished in the Grenadines). Current economic and welfare benefits: Fishing is predominantly artisanal with fishers on day trips, going out to sea in the mornings and returning in the evenings, using open vessels. In 2011 there were 2,500 fulltime or part-time fishers operating 750 vessels and associated with 500 vendors and traders. Then the sector contributed 1.7 % to the GDP. Approximately 1.8 million pounds of fish are landed annually with 0.2 million lbs. being exported. There is also a fleet of 32 foreign owned vessels carrying the country's flag that target tuna and similar migratory species in the Atlantic. These catches are landed in

Trinidad and Tobago. This fleet has an average

annual catch of 75 million lbs.. Critical management issues include: The establishment of a reliable system for monitoring the landings of the high seas tuna fishing vessels that land their catches and trans-ship from Trinidad and Tobago. This includes stronger participation in ICCAT, as well as improved management of coastal fisheries such as the queen conch, in accordance with CITES recommendations.

Suriname: *Targeted resource:* The fisheries sector comprises an industrial and an artisanal fleet. Boats in the industrial fishery either target shrimp or fin fish using specialised gear. Artisanal fishers target fin fish (sea trout, bangmary and others). Current economic and welfare benefits: The artisanal fishery operates on the coast and is the largest producing sub-group, averaging between 46 to 50 million lbs. annually. Total annual marine capture production is about 84 million lbs.. The maximum number of vessels permitted to operate varies with the fishery resource being targeted, for example: 4 are allowed in the bottom trawl shrimp fishery (greater than 45 fathoms), 30 in the shrimp fleet operating at about 15 fathoms, and 32 in the sea bob fishery at depths between 10 to 18 fathoms. In the large pelagic line fishery 60 vessels are allowed. Critical management issues include: Reviewing regulations pertaining to turtle excluding devices (TEDs) for shrimp trawlers; monitoring IUU fishing activities perceived undertaken by both domestic and foreign vessels; management of the fishing effort in the fin fish fishery by limiting resource access; maintaining MSC certification for industrial sea bob fishery.

Trinidad and Tobago: *Targeted resource:* The fisheries resources targeted include shrimp, ground fish/demersal, coastal pelagic and oceanic or highly migratory pelagic. Current economic and welfare benefits: Three fleets operate in the country: industrial, semi-industrial and artisanal, utilising different gear and methods. There is also a recreational fishery. In 2003, approximately 1100 vessels operated in Trinidad with 96% being artisanal while those in Tobago

Box 2: Additional collective national benefits include: reduction in poverty and vulnerability in fishing communities where such maladies are high; and greater resilience to the negative impacts of climate change and climate variability.

were estimated to be about 300 with 97% being artisanal. Total production was estimated to be valued at approximately USD 10.0 million in 2007. In 2003 shrimp exports were estimated at about USD 1.0 million. Demersal and oceanic pelagic fish are also among the products exported. Critical management issues include: Transition from open access to a limited entry fishery to avoid overexploitation of the resource; and improved participation in ICCAT.



CNFO

The Caribbean Network of Fisherfolk Organisations (CNFO) is a non-profit regional network operating in the CARICOM countries. Its mission is to "Improve the quality of life for fisherfolk and develop a sustainable and profitable fishing industry through networking, advocacy, representation and capacity building.

CRFM

The CRFM is an inter-governmental organisation whose mission is to "Promote and facilitate the responsible utilisation of the region's fisheries and other aquatic resources for the economic and social benefits of the current and future population of the region". The CRFM consists of three bodies – the Ministerial Council, the Caribbean Fisheries Forum and the CRFM Secretariat.

CRFM members are Anguilla, Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago and the Turks and Caicos Islands.

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