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**UNCTAD-DOALOS**  
**Ocean Economy and Trade Strategies (OETS)**

**Preliminary Sectors Assessment**  
**BARBADOS**

Bridgetown, June 20, 2018



1. Objectives
2. Fish and Fishery products
  - Production
    - Marine Catch vs Aquaculture
  - Consumption
    - Imports vs domestic products
  - Trade
    - Imports vs exports
  - Social & Environmental Considerations
    - Employment and earnings (gender and age dimensions)
    - Sustainability
  - Trade policy
3. Coastal and Marine Area Management, Protection and Restoration
4. (Additional) Discussion Points



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# 1. Objectives



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- Overall: definition of the facts sheets structure and contents (Goods *vs* Services)
    - Brief presentation of sectors to be included in Facts Sheet exercise
    - Identification of data from domestic sources to be used for the Facts Sheets
    - Discussion of possible/reasonable indicators to be included in the Facts Sheets
  - Brainstorming about issues at stake



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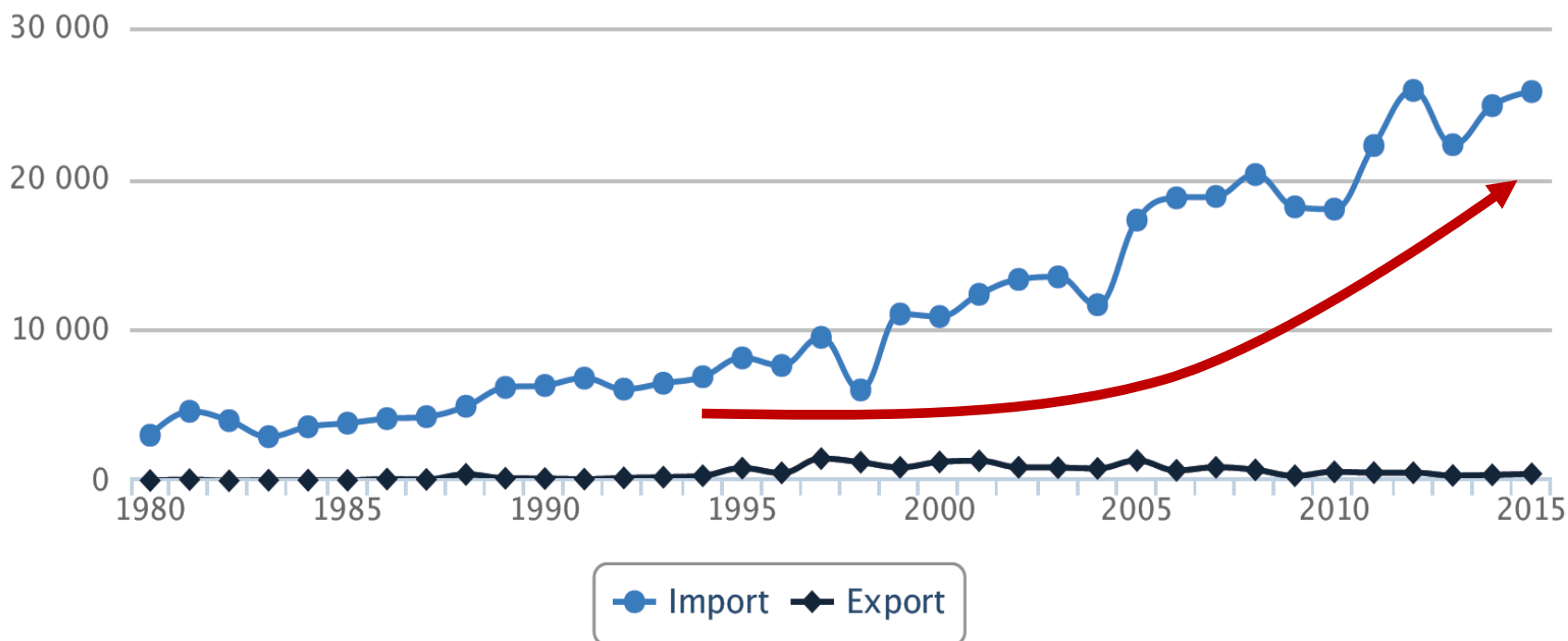
## 2. Fish and Fishery products



- Barbados is a net food importing country and fish is no exception

Total imports and exports of fish and fishery products for Barbados (USD 1000)

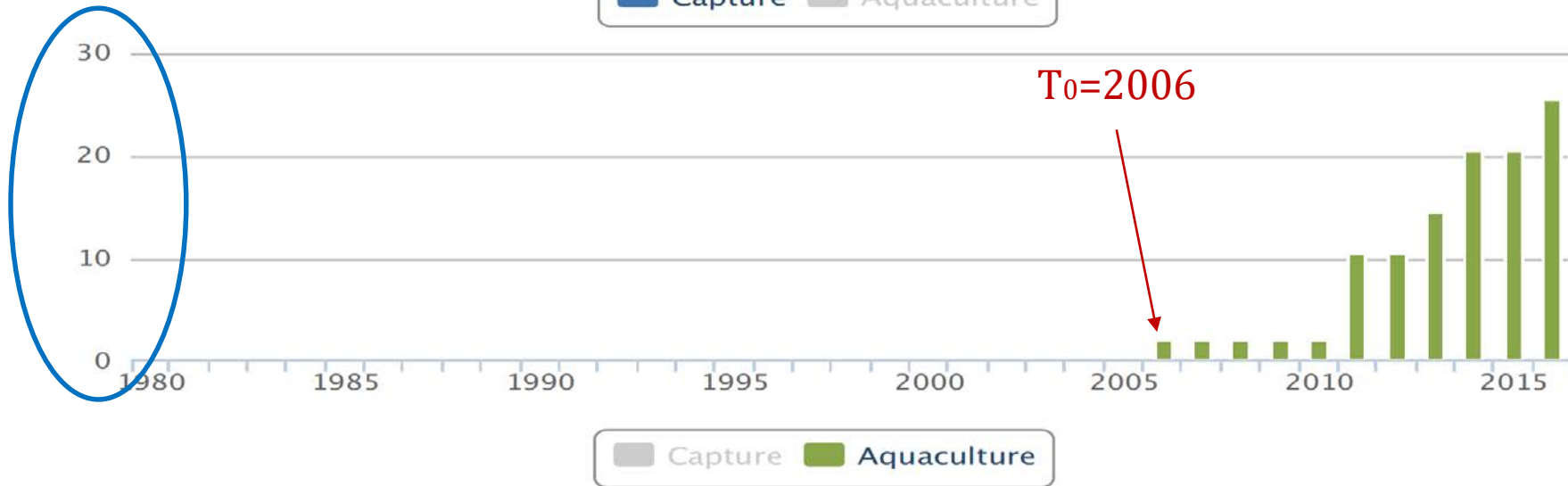
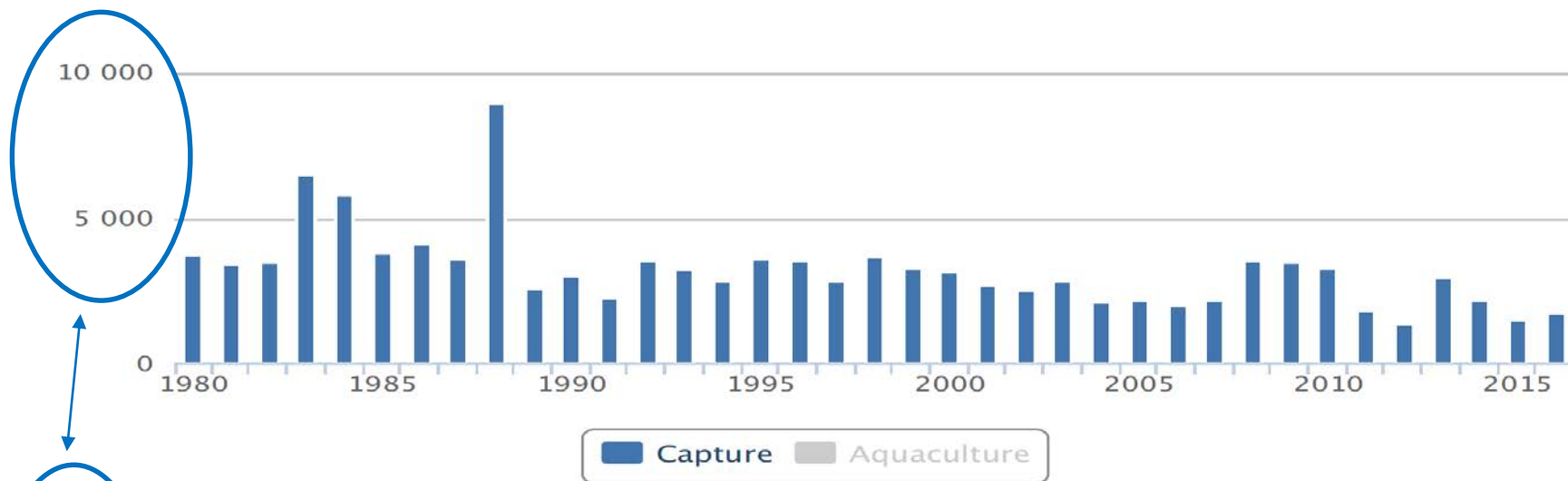
Source: FAO FishStat



# Production

Total capture and aquaculture production for Barbados (tonnes)

Source: FAO FishStat



- The estimated total annual landings for the past 30 years have fluctuated between 3,000 and 5,000 tonnes

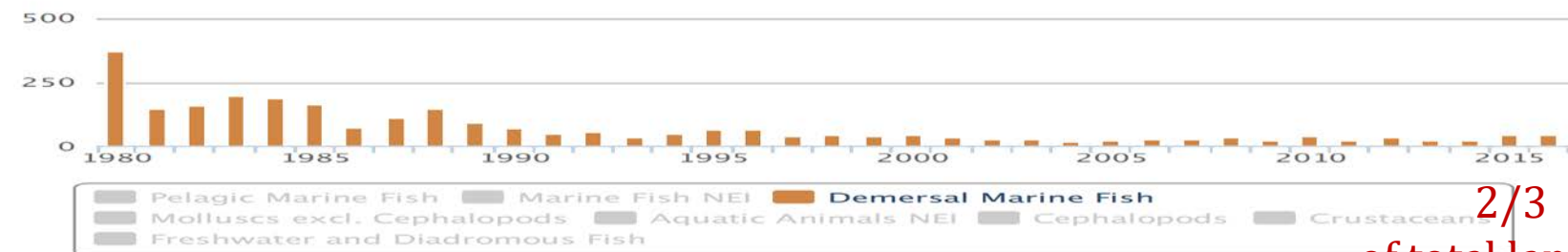
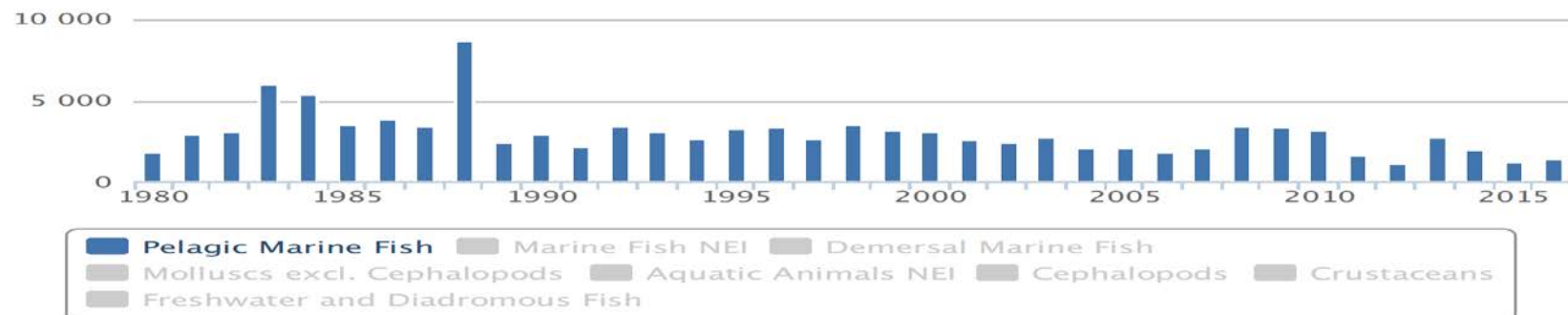
	Ocean Area	Species	2012	2013	2014	2015
Aquaculture	Inland waters	Freshwater fishes	10t	14t	20t	20t
	Inland waters	Crustaceans	0.5t	0.5t	0.5t	0.5t
Capture	Marine areas	Marine fishes	1361t	2977t	2989t	3089t
	Marine areas	Molluscs	11t	11t	11t	11t

Source: FAOStats

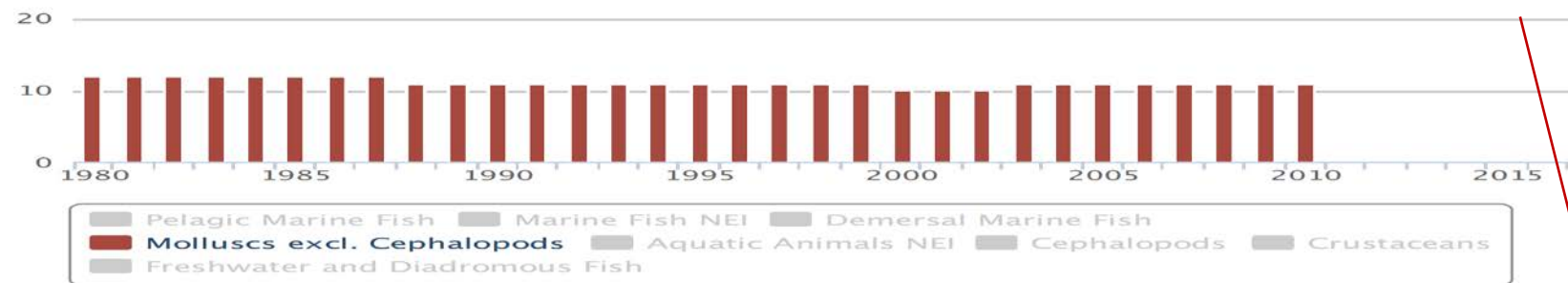




Major species groups in capture production for Barbados (tonnes)  
 Source: FAO FishStat



2/3  
of total landings

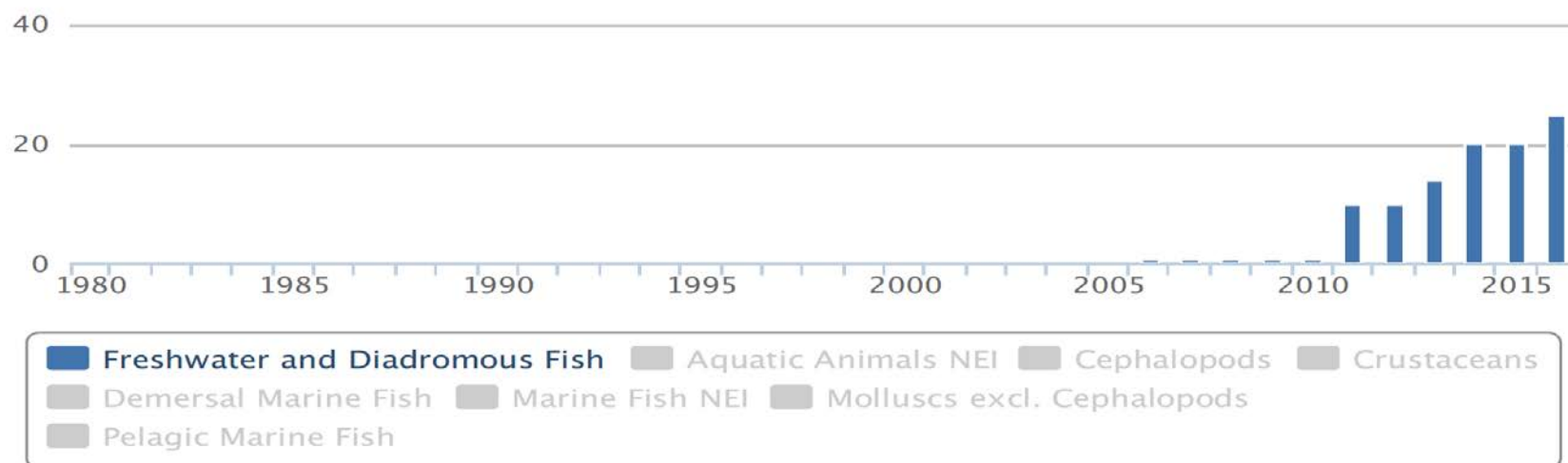


Six main fisheries: shallow shelf reef, deep slope, coastal pelagic, large pelagic, flying fish and sea urchins + Lobsters and conchs (minor)



## Major species groups in aquaculture production for Barbados (tonnes)

Source: FAO FishStat

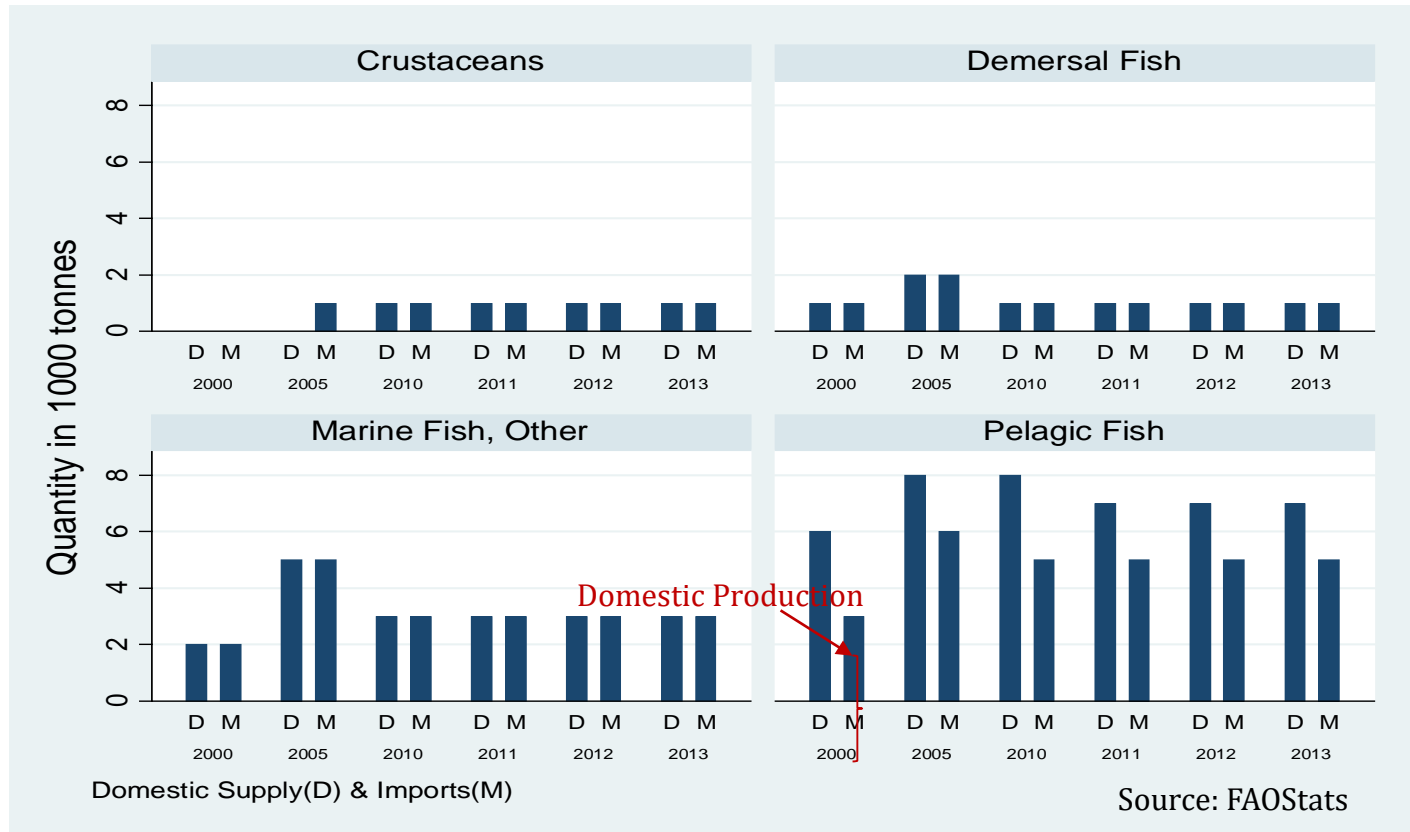


- Inland freshwater aquaculture production started in 2006 with the major species groups being Pisces and Crustacea: Red tilapia has the greatest production, followed by the red claw crayfish
- The production by inland water aquaculture supplies essentially the local market
- Very few aquaculture producing farms (more than one?) operating in the island



# Consumption

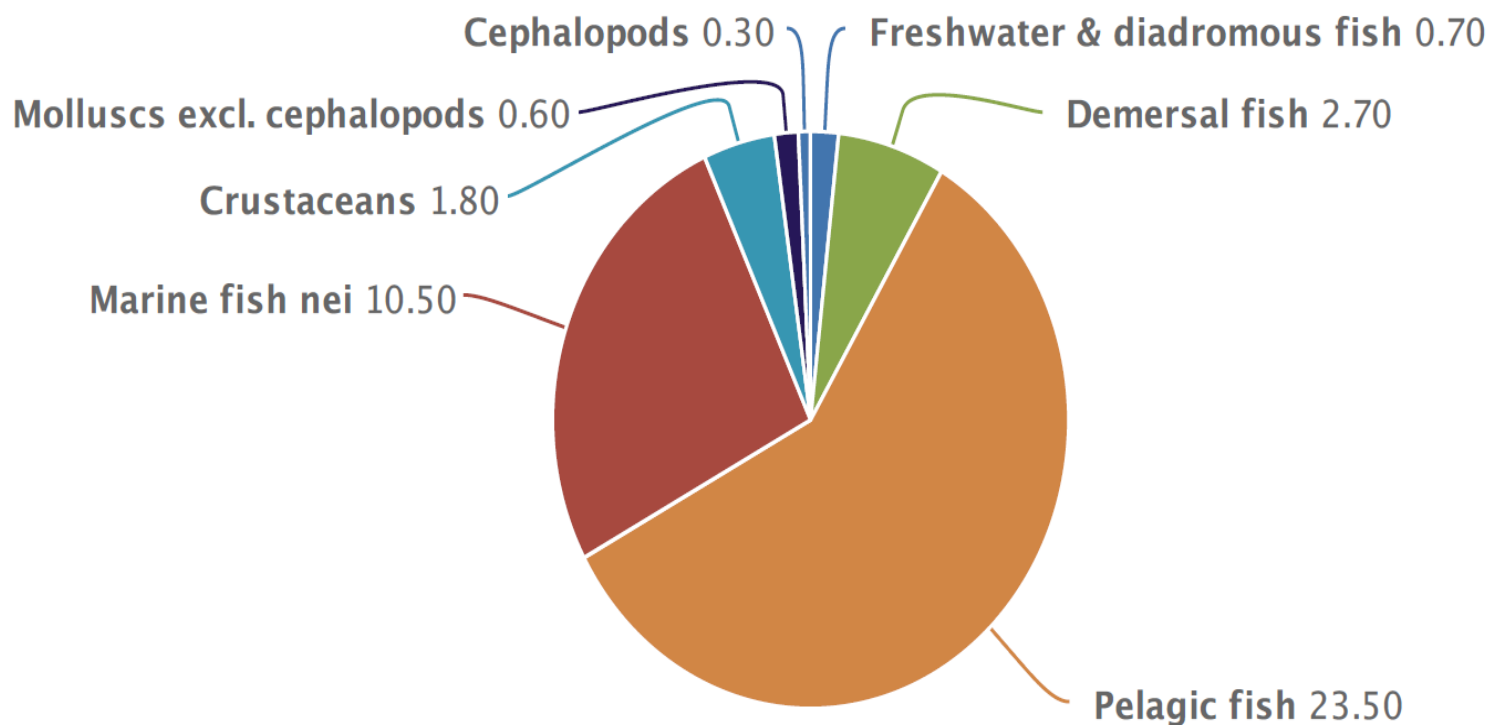
- Fish domestic supply and imports (>1000 tonnes)



- 5 000 to 6 000 tonnes of fish are consumed annually: 3 000 tonnes are landed by domestic vessels and the remaining amount (about half) is imported

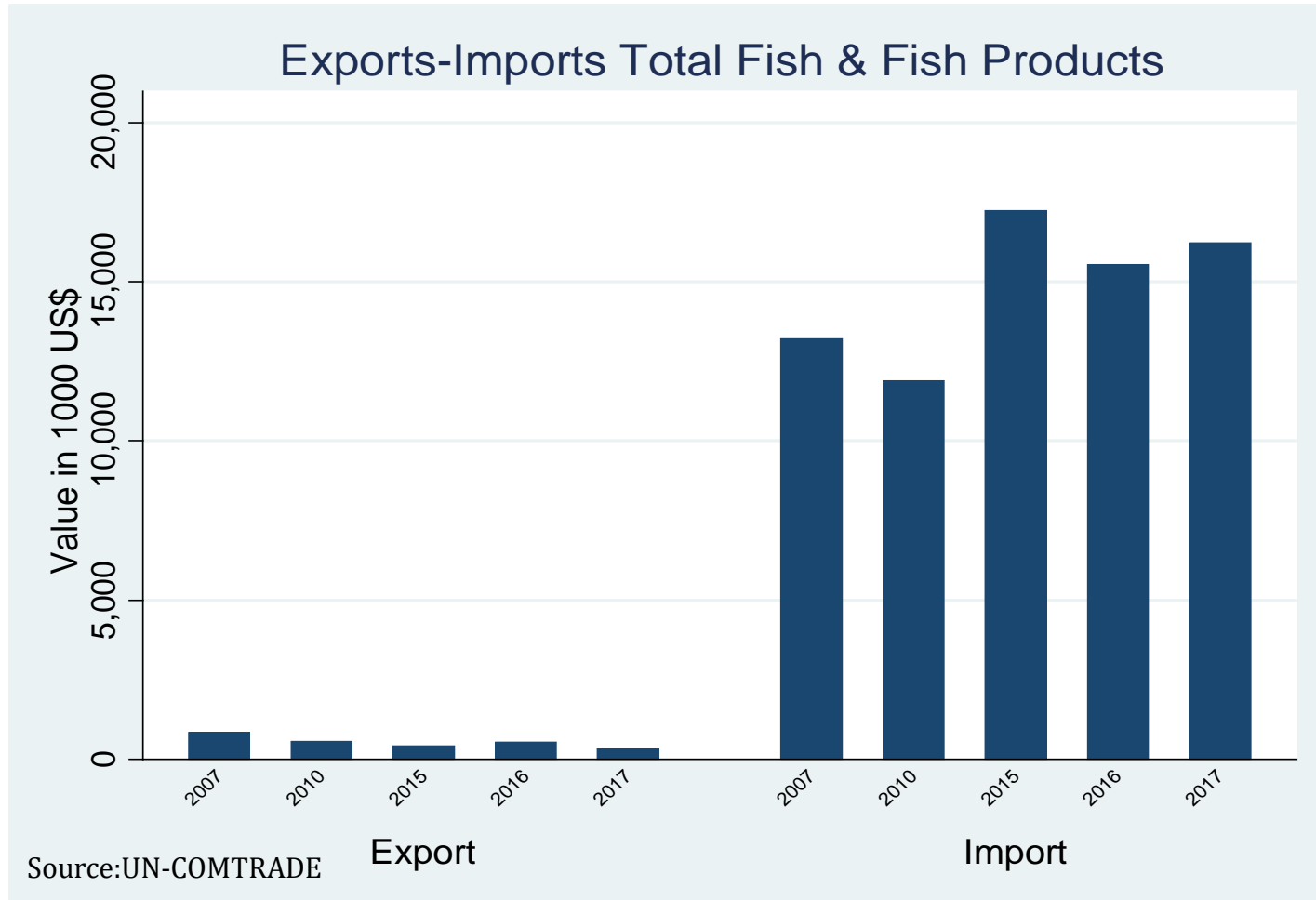
## Composition of per capita fish supply for Barbados – 2013 (Kg)

Source: FAO FishStat



# Trade

- Exports & Imports in Fish and Fishery products (total)



!!! Available HS Classifications:1988/92, 1996 and 2002 !!!

Top 10 imports 2017	Quantity (tonnes)
Tunas, skipjack and bonito	2449
Other dried fish	2385
Salt	1751
Shrimps and prawns	1269
Sardines, sardinella	408
Mackerel	312
Fish fillets, dried, salted	302
Other frozen fish	294
Yellowfin tunas (Thunnus albacares)	245
Frozen fillets	188

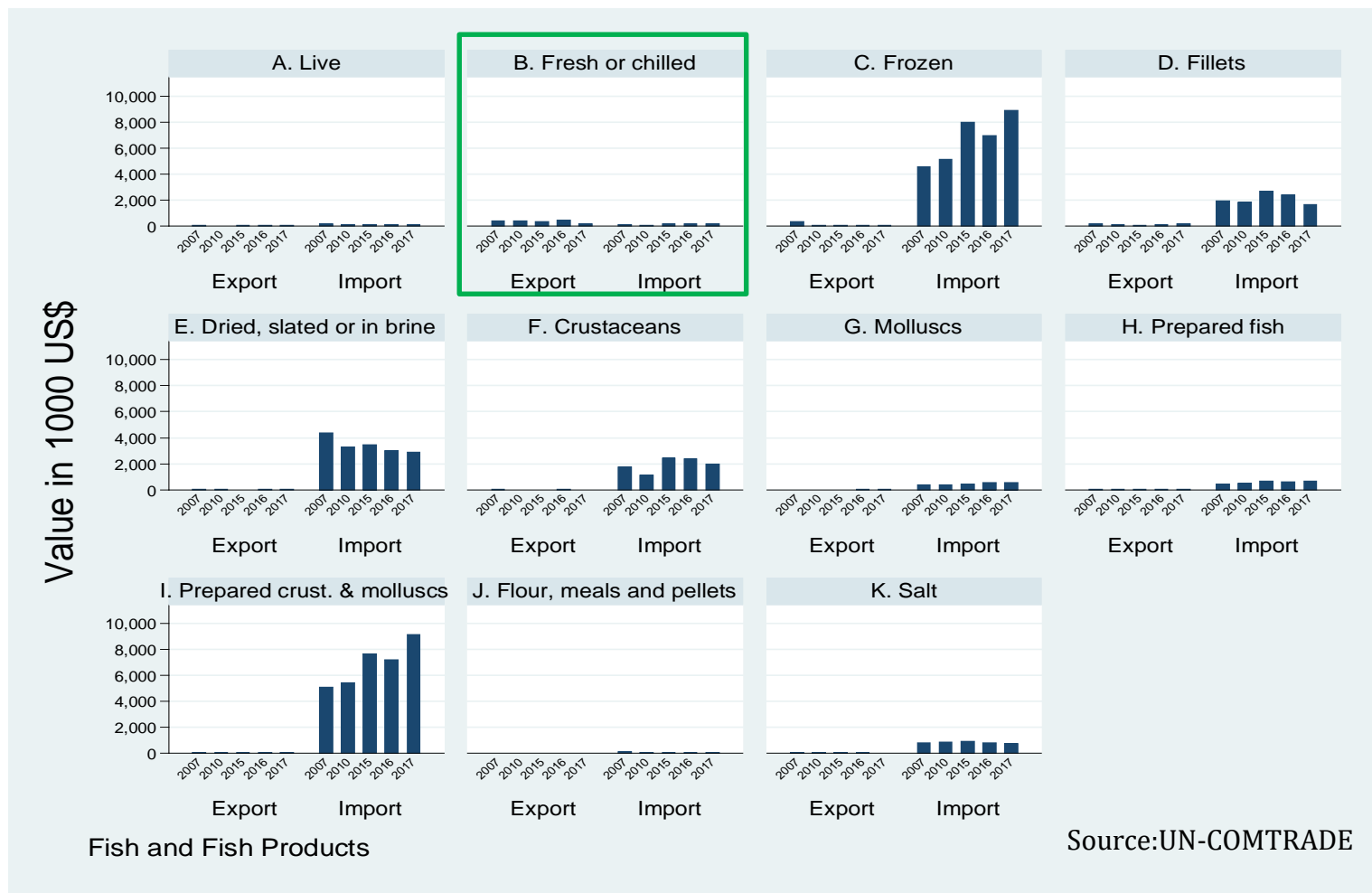
Top imports 2017	Value (US\$)
Other frozen fish	8025224
Tunas, skipjack and bonito	5924212
Sardines, sardinella	1823171
Shrimps and prawns	1153956
Fish fillets, dried, salted	1144673
Frozen fillets	938618
Other	850669
Salt	764595
Yellowfin tunas (Thunnus albacares)	698245
Lobsters (Homarus spp.)	641951



Top 10 exports 2017	Quantity (tonnes)
Fresh or chilled Fillets	78
Yellowfin tunas (Thunnus albacares)	53
Dogfish and other sharks	14
Bigeye tunas (Thunnus obesus)	7
Tunas, skipjack and bonito (Sarda s	4
Other prepared or preserved fish	3.9
Mackerel	3
Sardines, sardinella and brisling o	2.5
Shrimps and prawns	0.988
Fishliver oils and their fractions	0.764

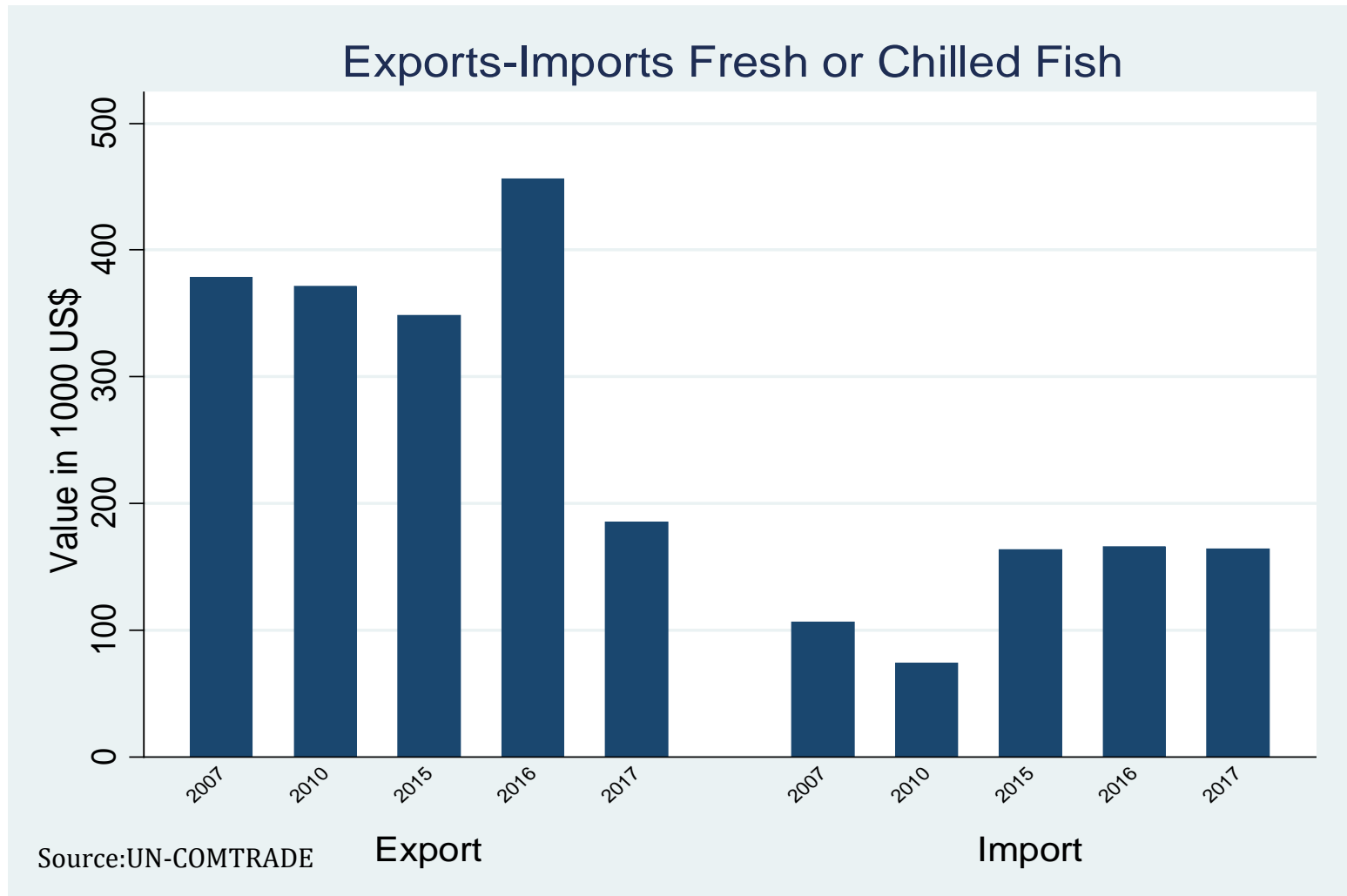
Top exports 2017	Value (US\$)
Yellowfin tunas (Thunnus albacares)	145377
Fresh or chilled Fillets	137332
Bigeye tunas (Thunnus obesus)	33804
Other prepared or preserved fish	33209
Cod	6203
Shrimps and prawns	6028
Frozen fillets	5351
Tunas, skipjack and bonito	4479
Mackerel	426
Pacific salmon	3864

- Exports & imports in Fish and Fishery products (by sub-sector)

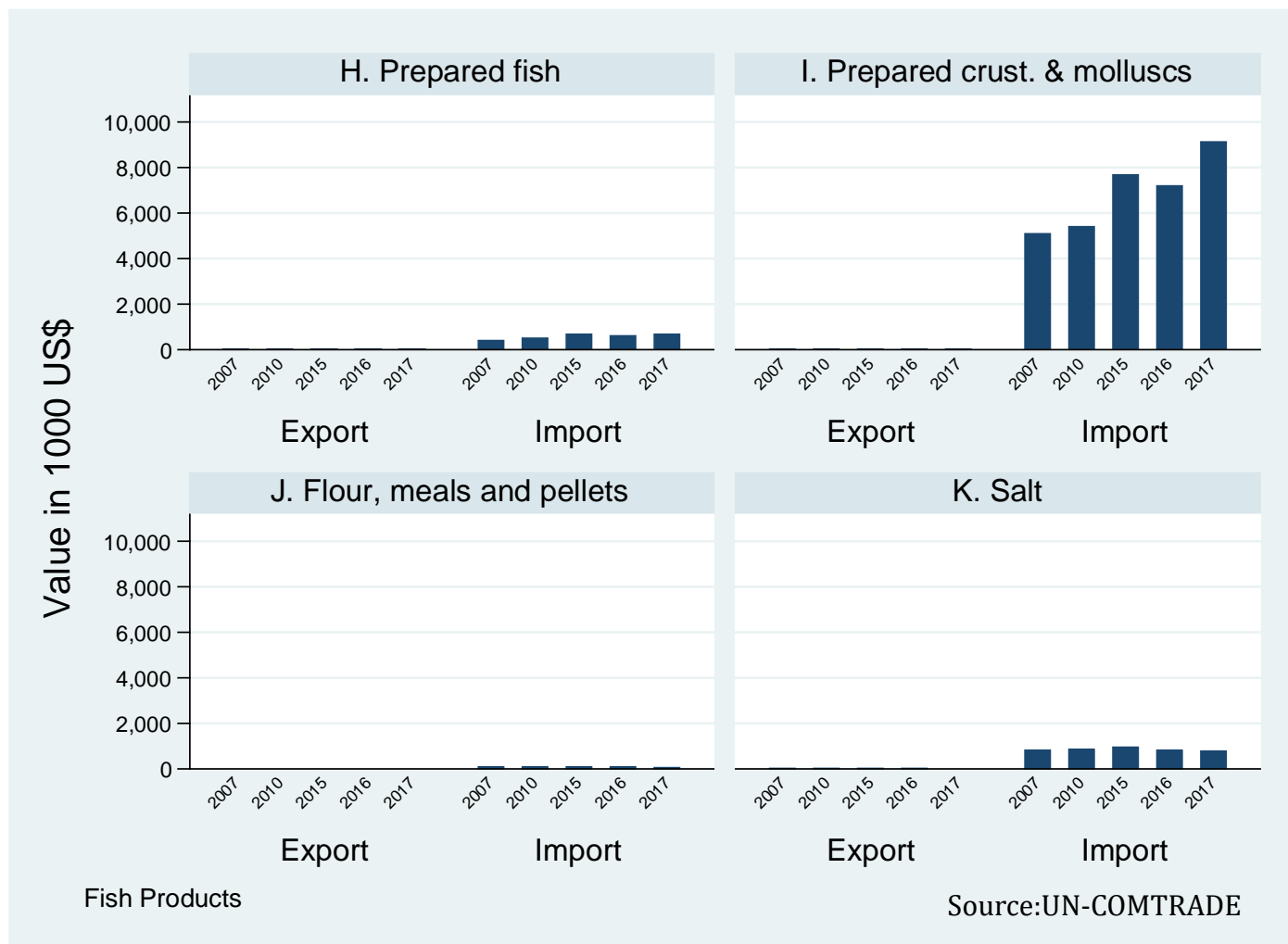




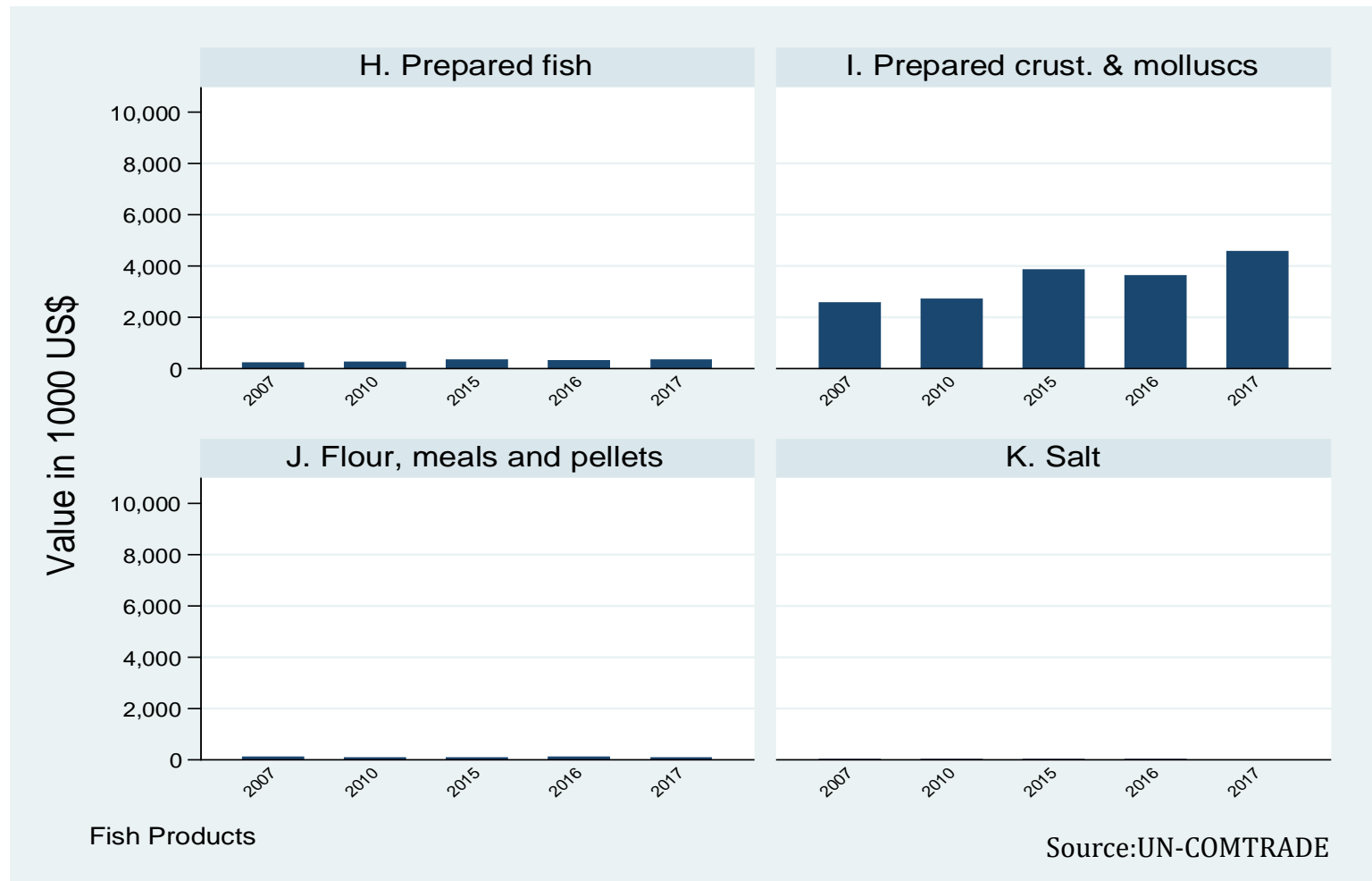
- Products with overall positive trade balance



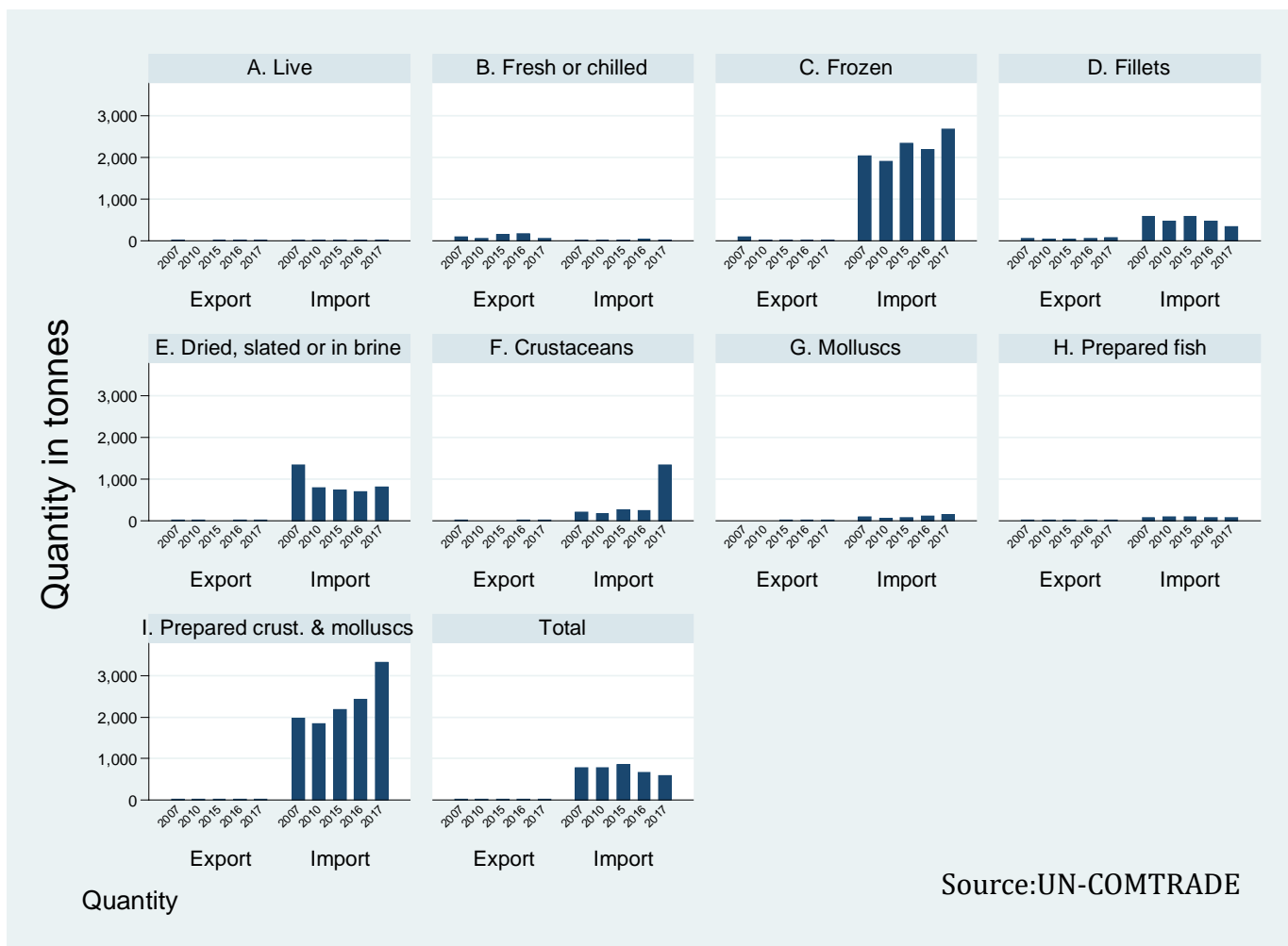
- Exports & Imports in processed products



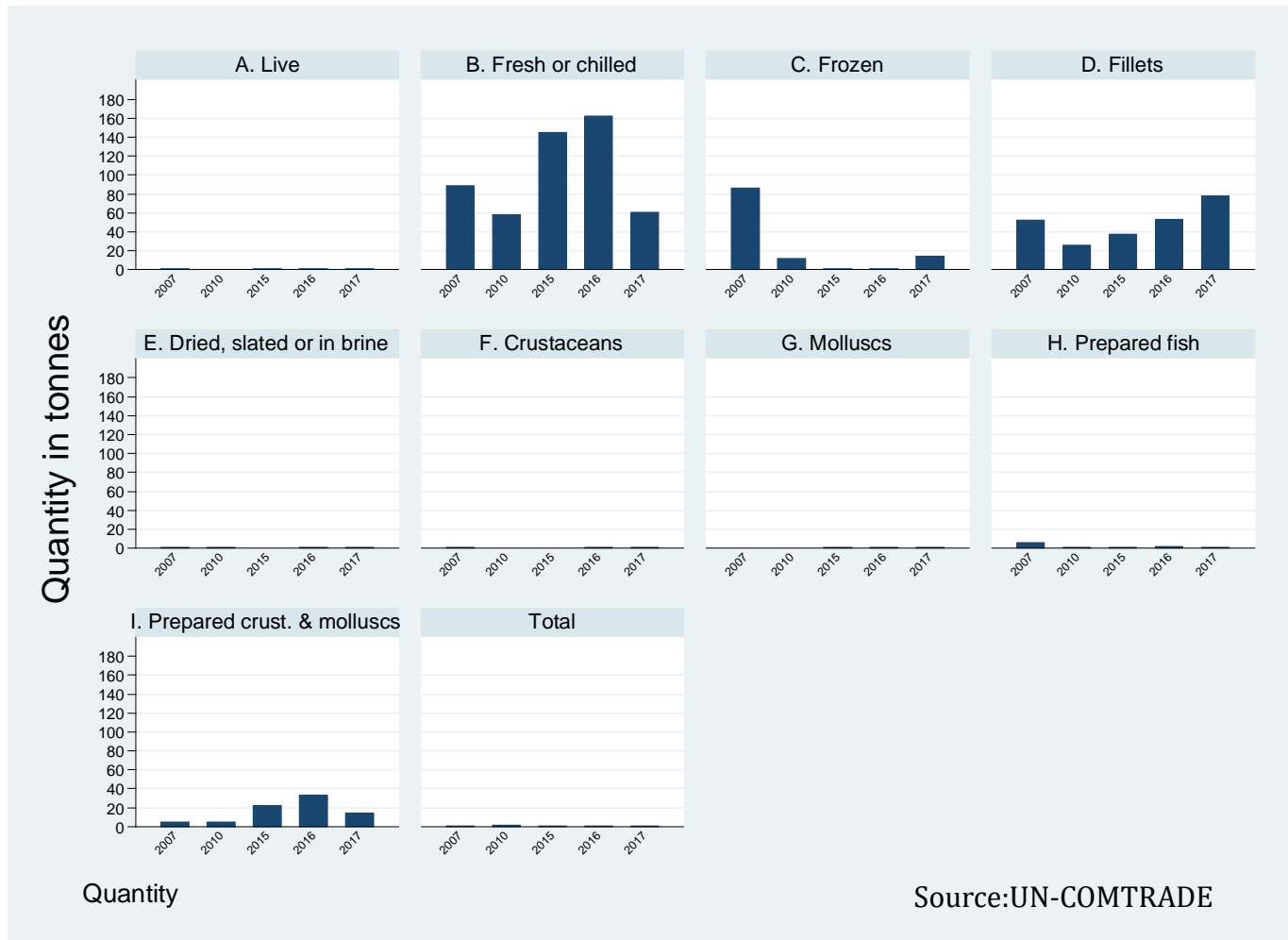
- Exports in processed products



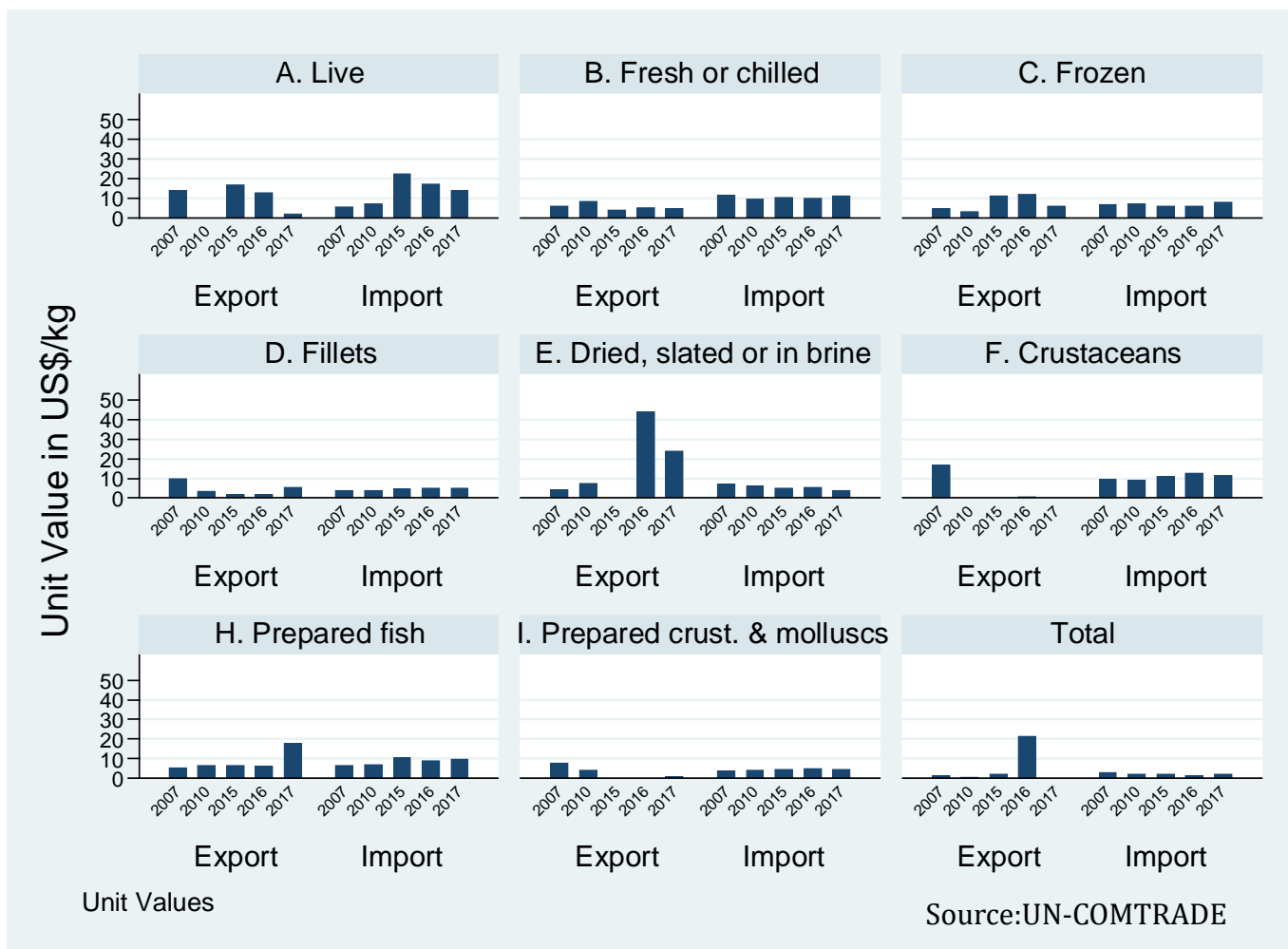
- Exports & Imports in Fish and Fishery products (Qty)



- Exports in Fish and Fishery products (Qty)

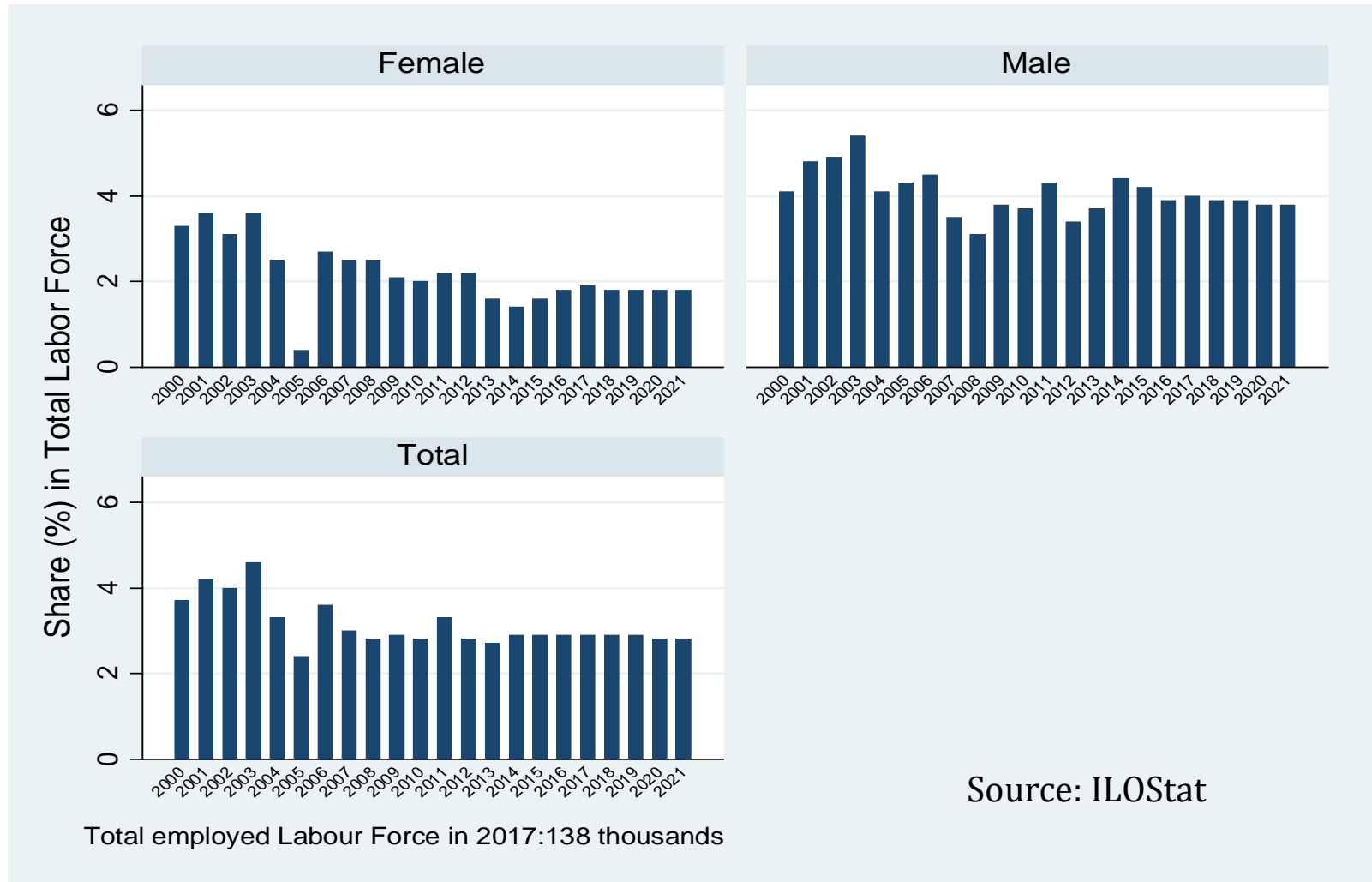


- Exports & Imports in Fish and Fishery products (UV)



# Social & Environmental Considerations

- Employment in Agriculture and fishing



- Approximately 6000 individuals are employed, both directly and indirectly in the fishing industry
- The harvest sector is made up of fishers and boat owners: fishers make up 63% of the harvest sector and boat owners 37%
- The majority of fishermen and boat owners are males: 99% of fishermen and 91% of boat owners are males
- Vendors and boners make up the majority of the primary post-harvest stakeholders (37% and 39%, respectively)
- Women make up 63% of the post-harvest sector
- **Employment in aquaculture?**
- **What about earnings?**





- The stock status of fisheries ranges (with uncertainty) from under exploited to overfished
  - Many catches of the demersal and shellfish species are suspected not to be reported and thus it is believed that official statistics underestimate their catch levels
  - The use of fish aggregating devices (FADS) to increase catches or catch rates of selected species of large pelagics needs further control
- There is a need for fishing access agreements to harvest flying fish resources that seem under-utilized in neighboring countries
- Land occupation of aquaculture?

What could be a realistic expansion potential of capture and aquaculture production respectively?



# Trade Policy

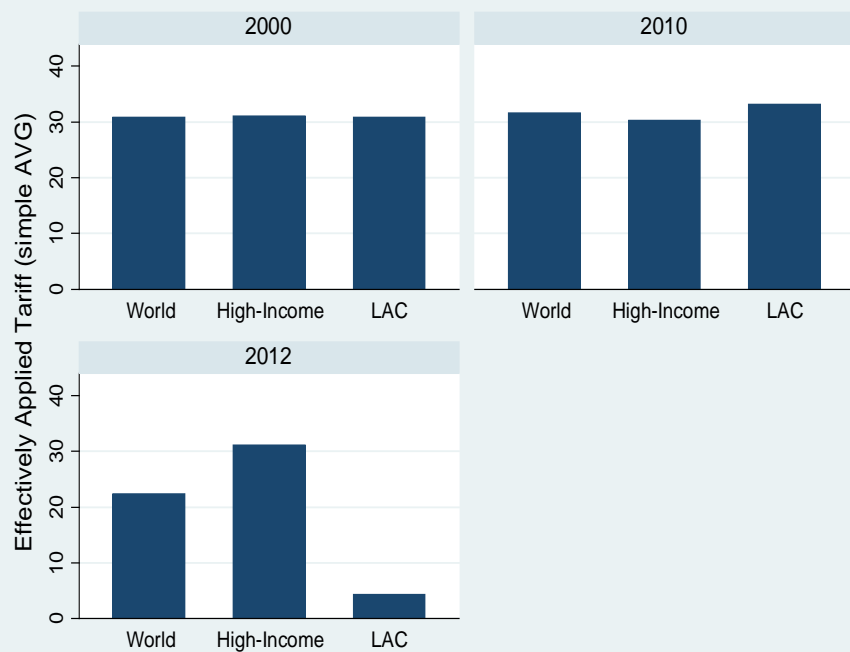
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- Binding coverage in fish and fish products: 1.6% (bound rate=100%) versus 100% in agricultural goods («policy space» is available)
- RTAs: **CARICOM** (Antigua and Barbuda; Bahamas; Barbados; Belize; Dominica; Grenada; Guyana; Haiti; Jamaica; Montserrat; Saint Kitts and Nevis; Saint Lucia; Saint Vincent and the Grenadines; Suriname; Trinidad and Tobago) + **EU - CARIFORUM States EPA**
- Effectively applied tariff is on average about 22%
- Duty free imports essentially from CARICOM countries (but relatively small share in total imports)
- Lower tariffs (around 15%) on processed products (tariff «des-escalation»)
- **No data collected by UNCTAD on NTMs**



## Effectively Applied Tariff (by origin)

## Duty free Imports (by origin)



Graphs by Tariff Year



Graphs by Tariff Year

Source: UNCTAD-TRAINS



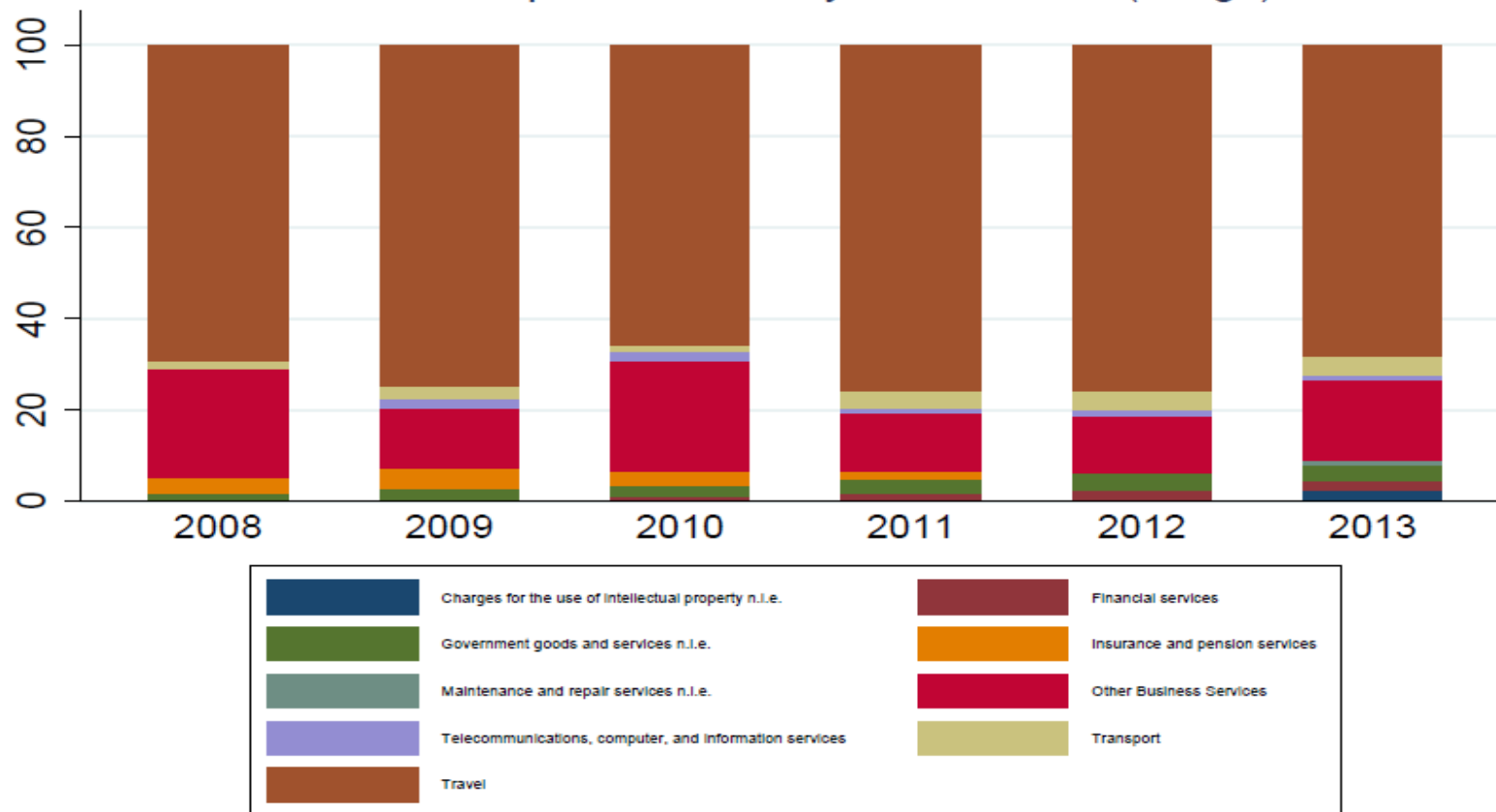
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# 3. Environmental Services: Coastal and Marine Area Management, Protection and Restoration



# Services Sectors: exports composition

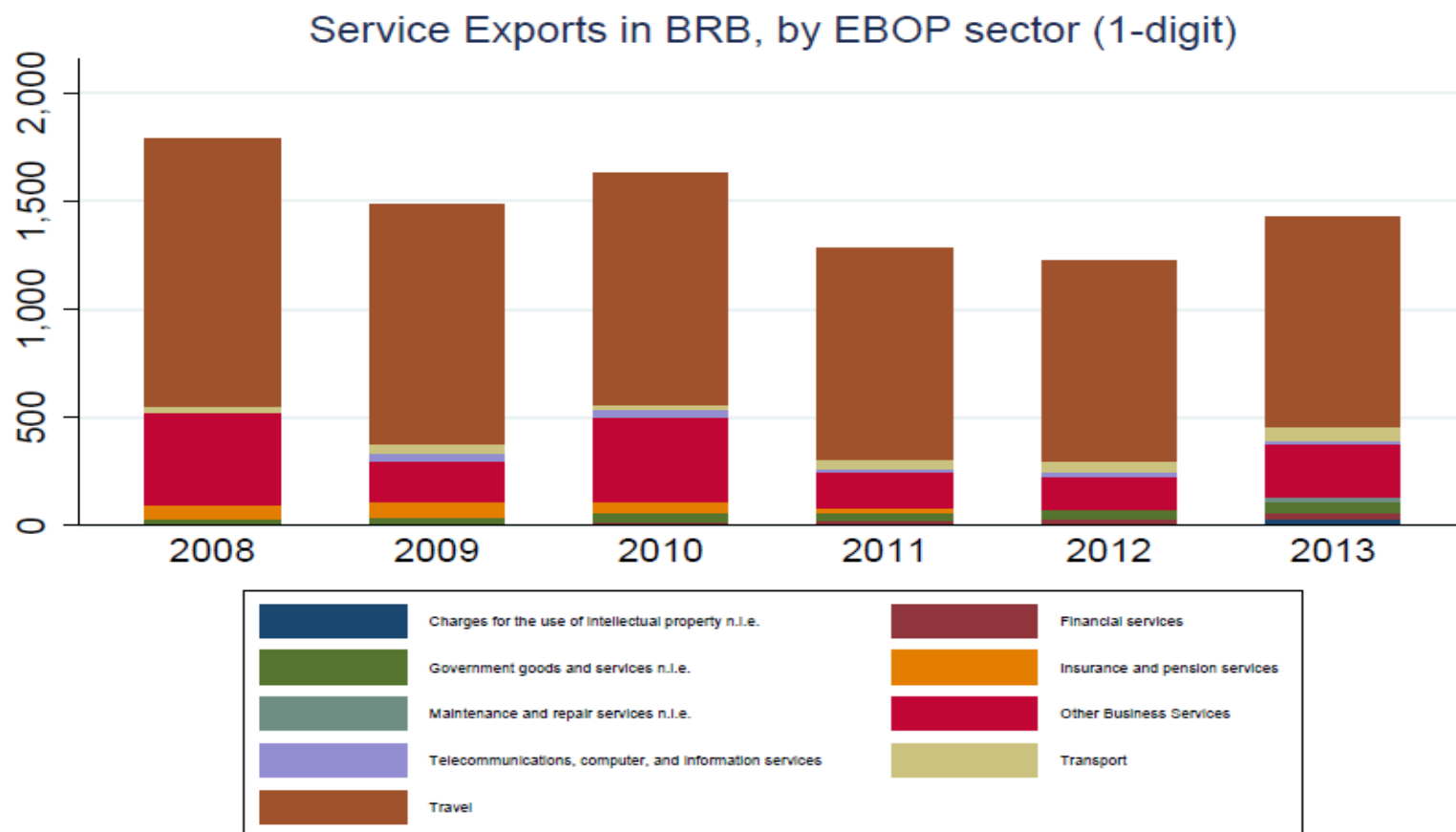
Service Exports in BRB, by EBOP sector (1-digit)



Note: Calculations based on IMF (2017): World Trade in Services: Evidence from a new database

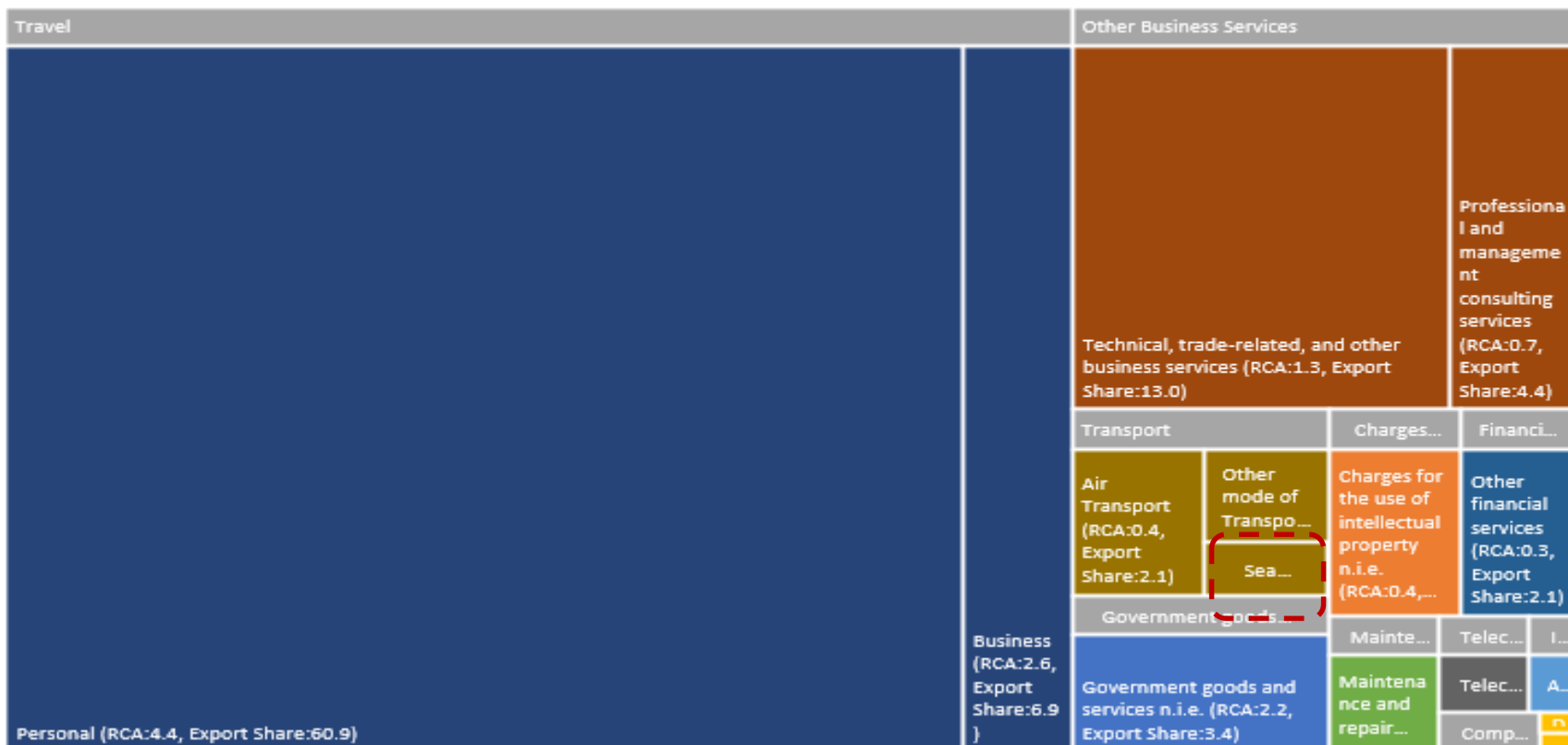


# Services exports: levels



# Services exports: sector composition

Service exports in BRB, by EBOP sector (2-digits) in 2013



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# 4. Additional Discussion points





- Facts sheets would have to rely on a more disaggregated analysis (e.g. at the HS 6-digit level for goods) with possibly an updated classification (larger number of species represented)
- Analysis should also be based on national statistic sources:
  - Household surveys to extract employment and earnings information
  - Customs data to retrieve firm level trade flows (exports and imports) information
  - Firms surveys to obtain production and market information
- Firm and household data would allow a more refined analysis of labor (e.g. formal versus informal), production and trade conditions



- Market access conditions for selected sectors need to be assessed
- More detailed analysis of domestic trade policy (tariffs and possibly NTMs (in particular SPS measures and TBTs) )

