

Ocean Economy and Trade Strategie (OETS): Project Implementation



Ms. Felicia Cruz

Belize Fisheries Department

Main Activities for Belize:

Assessment & Formulation

- **Data analysis** and **stakeholder mapping** of the potential of ocean-based economic sectors/products and a **desk study** on relevant legal and institutional components of an integrated ocean governance framework;
- Convene **National Stakeholder Workshop** to discuss, identify, and select key promising ocean-based sectors for further analysis;

Validation & Implementation

- **Produce a participatory OETS** on the selected ocean-based sectors and convene a **National Stakeholder Validation Workshop** for the OETS;
- Provide demand driven advisory services in cooperation with experts to support OETS **implementation of 1 national priority action**;
- Organize **national training workshop** to create capacity for the priority actions identified;

Dissemination

- Participate in 1 **regional experience sharing workshop** with the other beneficiary countries;
- **Disseminate the findings** of the OETS.

Action Plan:

- Focuses on **Marine Fisheries** and **Seafood Processing Sectors**.
- Identification and description of the selected actions for implementation.
- Anticipated outputs and expected impact.

Sector	Issue Code	Key Issued highlight	Proposed Strategy
Marine fisheries	14	Finfish exports have decreased in the past five years and fishing pressure on spiny lobster and queen conch has increased.	Support the increased exports of finfish (fresh and frozen fish) and finfish products to regional and international markets.
			Increase domestic consumption through tourism sector.
			Design and implement SPS measures at fish markets, and other landing sites selling finfish.
Seafood processing	15	Need to identify additional and niche markets for Belizean marine and seafood products.	Provide access to new and strategic niche markets with the assistance of BELTRAIDE and other government agencies.
			Support export-oriented seafood business establishments to increase revenue through the use of smart marketing techniques (market intelligence gathering, sale/export of fishery products during highest demand/highest tourism periods).
			Incorporate technological tools to increase market access for seafood products (i.e. multi-species traceability systems).
			Support the application to other certification programs to increase market access, innovation, and competitiveness in the seafood sector.
			To support increased domestic consumption of lobster head meat.
To explore options for processing and export of currently discarded fishery by-products such as queen conch trimming, shell and pearls.			

Source: BFD, 2019 and OETS interviews conducted in 2019 (annex 3).





© Belize Fisheries Department

Marine Fisheries Sector



© Belize Fisheries Department

Table 9. SWOT analysis for marine fisheries sector

Strengths	Weaknesses
<ul style="list-style-type: none"> █ Existing legal framework for fisheries is in development. █ Underutilized stocks exist. █ Presence of a management authority. █ Manage access system exists. █ Funding for pilot study available through the MCCAP subproject. █ Research & Training capacity exists. █ Best practices guidelines exist. █ Trade Policy space exists. █ Processing capacity and some infrastructure. █ Logistics capacity to ship by land, air and water. █ HACCP plans exist by all fishermen cooperatives and processors (availability for knowledge transfer and training independent fishers). █ Stable environment conditions for six months of the year. 	<ul style="list-style-type: none"> █ Minimal legislation regarding finfish. █ SPS measures addressing finfish species. █ Lack of access to appropriate fishing gear. █ Limited capacity of current fishing fleet. █ Traceability system lacking. █ Informal distribution channels. █ Lack of understanding of the market demand. █ Lack of access to credit facilities. █ Limited knowledge of supply of finfish in domestic markets. █ Limited capacity to comply with sanitary standards at local retail markets.
Opportunities	Threats
<ul style="list-style-type: none"> █ Market expansion (domestic, regional and international). █ Diversification of fisherfolk income. █ Harvesting from un-utilized fishery stock (species listed in annex 6). █ High demand by tourists. █ Proximity to markets. █ Inputs readily and easily accessible (e.g. fish gears). █ Current negotiations for preferential trade agreements are underway. █ Use of fish waste, by-products and handicrafts for new product creation. █ Job creation for fish processing. 	<ul style="list-style-type: none"> █ Over-fishing and contribution to illegal fishing. █ Tropical weather disturbances and climate variability. █ Competition/importation from low-value foreign fish and fishery products. █ Low level of political will. █ Inconsistency of supply and quality.

Source: First National Stakeholder Workshop. UNCTAD, 2018e.

Seafood Processing Sector

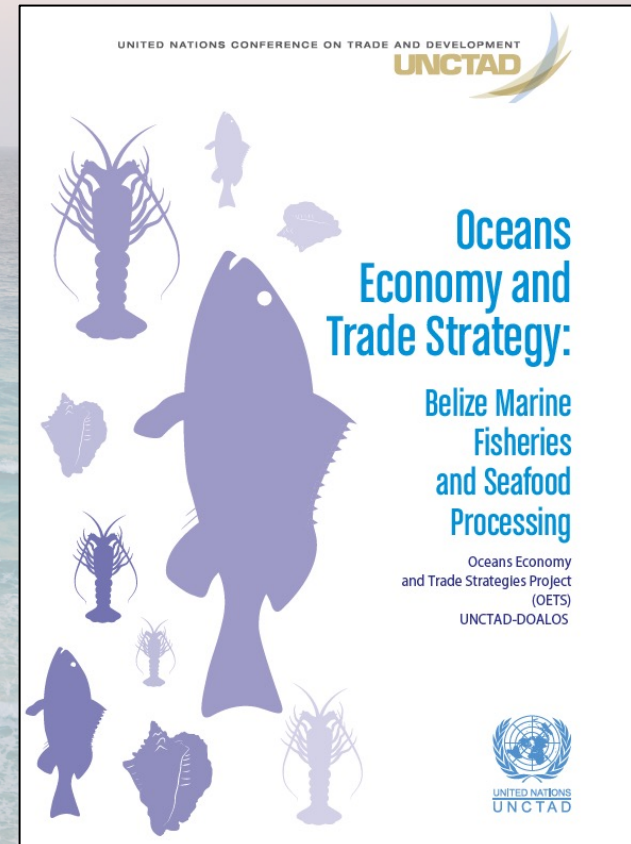


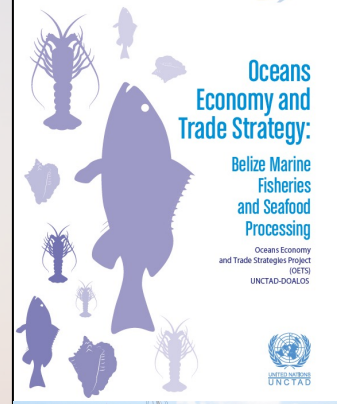
Table 11. SWOT analysis for seafood processing sector

Strengths	Weaknesses
<ul style="list-style-type: none"> ■ Sustained production volume under MSY (consistent supply and quality). ■ Stable market and access. ■ Primary processing capacity (fish fillets). ■ High reputation in the seafood market. ■ High quality standards (fisherfolks cooperatives). ■ Existence of fishing organizations (fishermen cooperatives). ■ Strong fishery management in place. ■ Availability of fishing fleet and manpower. ■ Good logistics channels. ■ Branding strategy exists for lobster and conch. ■ CITES compliance. ■ Stable currency. 	<ul style="list-style-type: none"> ■ Low potential to increase production for traditional species. ■ Low capacity for secondary manufacturing e.g. canned conch. ■ Insufficient capacity for product diversification. ■ Incomplete traceability system. ■ Inadequate central marketing system. ■ Inadequate working conditions for women.
Opportunities	Threat
<ul style="list-style-type: none"> ■ Potential for marine macro algae manufacturing. ■ Potential market expansion into niche markets (i.e. pharmaceuticals from spiny lobster shells). ■ Increase consumption by tourists. ■ Finance options exists for clean energy technologies through DFC renewable energy loans. 	<ul style="list-style-type: none"> ■ Illegal harvesting. ■ Input cost is relatively high in the region. ■ Correspondence banking challenges. ■ Income for fishers are not allowing them to retire early. ■ High dependency on few destination markets.

Source: First National Stakeholder Workshop. UNCTAD, 2018e.

Ocean Economy & Trade Strategy ACTION PLAN





Sector	Issue Code	Possible interventions/strategies	Actions	Indicator/Impact
Marine Fisheries & Seafood Processing	11-15	Develop a comprehensive and coherent OETS report and Action Plan	Host workshop to present and validate findings and strategies for OETS-Belize and collect comments	Completed OETS report
			Host workshop to present status update of OETS, and way forward for chosen sectors	Revised trade strategy for chosen sectors
	11	Develop regulations for finfish to create a safeguard for fish stocks	Conduct deep sea finfish stock assessment	Report of finfish stock assessment
			Validate deep sea finfish stock assessment	Finfish & deep-sea Management Plan
			Fisheries regulation is drafted to establish minimum size limits and possible TAC for finfish species	Regulations est. TAC, gear restriction/size limits
		With the development of DSF, the department should consider establishing a robust data collection program for finfish and adopting the AMF framework for finfish as well.	Conduct revision of data collection methodologies, data inventory, and mapping of finfish datasets	Accessible finfish data
			Conduct workshop with co-managers and stakeholders select reliable data sets for the AMF framework	Adaptive Management Framework for finfish
	12	Assess the capacity of data management procedures.	Develop a data entry management protocol for managed access logbook data set	Data collection protocol and methodologies for targeted species
			Develop a data entry management protocol for fisherfolk dataset	
			Hire additional staff for database management system	Trained staff
			Conduct training in database management for fisherfolk database	
			Institute licensing registration late fee and deadline for registration	Revenue collected by GoB
	13	To support and strengthen fisheries law enforcement collaborations through increased monitoring, control and surveillance.	Conduct assessment to quantify volume of marine species extracted and exported from IUU fishing	Report - estimated fisheries production & export figures
			Conduct assessment of vessel, staff, and equipment needs to reduce IUU by half over the next 5 years.	Audit report of enforcement activities & Recommendations
			Training of enforcement officers and other enforcement agencies to continue collaborative enforcement of fisheries laws	Strategic enforcement plan for target species





Ministry of Blue Economy
& Civil Aviation

Implementation of Strategic Actions.



Government of Belize

- **Finfish Data Collection Methodology** exercise for Belize. Conducted by UNCTAD consultant Ramon Carcamo with support from Fisheries Department (*pictures taken by R. Carcamo*).
- Obj: To determine and quantify the finfish species landed at Conch Shell Bay Fish Market for six (6) months from May – October 2021; to identify the types & quantity of fishing gears used to capture the finfish landed & estimate the fishing effort applied to capture the finfish landed for six (6) months (May – October 2021) and estimate the age population structure of the finfish species landed during the study period.





Ministry of Blue Economy
& Civil Aviation

Implementation of Strategic Actions.

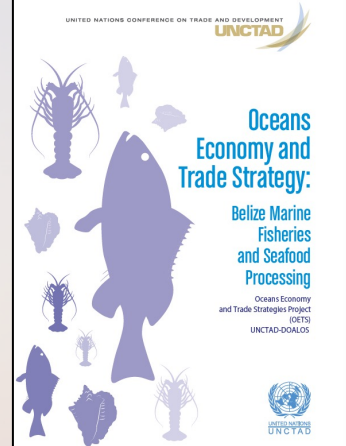


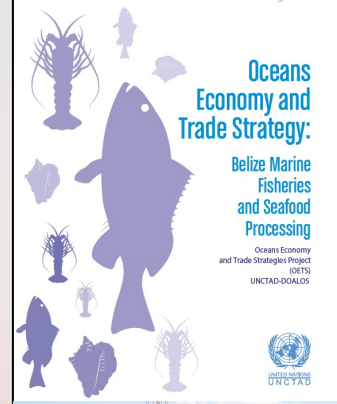
Government of Belize

- Training Workshop on **Adaptive Multispecies Finfish Management Plan** and
- The next steps are designed to **encourage sustainable development** of the Marine Capture Fisheries Sector and the Seafood Manufacturing sectors, while **discouraging** and **reducing** illegal forms of fishing in Belize.



Marine Fisheries	14	Facilitate financial access to fishers for obtaining DSF equipment.	Conduct round table discussion with stakeholders and fishing associations to determine pathways and access small business finance programs for fisherfolk	Acquisition of DSF equipment
		Increase access to finfish through supermarkets and other retail stores	Consult with major retailers in Belize (e.g., James Brodies and Co. & Save U) to determine capacity to supply and sales of finfish in retail stores.	Guidelines on the acquisition, sale, and distribution of seafood products in retail stores
			Develop and implement a standardized seafood labelling protocol for domestic seafood	Seafood label standards for domestic products
		Promote the supply & transport of fresh seafood products to inland areas, particularly inland towns & Support increased domestic consumption through tourism sector	Host roundtable discussions with management bodies of tourism sector to develop protocol/ guidelines on acquisition of marine/seafood products	protocol or guidelines on acquisition of marine and seafood products
			Develop & implement a distribution channel strategy to supply marine finfish to hotels & restaurants	Procedures on handling & transporting finfish/ seafood
		To cement the undeniable linkages between fishing and tourism with the goal of optimizing economic benefits for both sectors	Assist in the development and implementation of the Pesca Tourism in Northern Communities	TBD
			Consult with Belize Tourism Board/BTIA on developing a specialized tour operator license for fishers	TBD
			Develop criteria for specialized tour operator licenses	TBD
		Support the increase export of finfish (fresh and frozen fish) and other finfish products to regional and international markets:	Include the trade of fish products in trade negotiations with Mexico & other trade agreements	Market study on potential buyers, feasibility assessment, and projected figures
			Identify potential buyers so the trade is feasible (eg. Hotel associations in Cancun)	
			Investigate options for the export by air freight of fresh fin fish to international markets of close proximity.	
		Improve and standardize fish market displays (access to ice, running water, and an effective drainage system)	Conduct fish market needs assessment in compliance with SPS Standards in all fish markets of Belize	Report on recommendations and plan to implement health and safety standards at fish markets in Belize
			Review current and update or develop minimum sanitary standards for fish markets and stands	
			Establish a fish market use payment fee for sale of seafood product	Revenue generated for upkeep of market facilities
Support the implementation of SPS measure in local fish markets.	Conduct stakeholder training sessions with independent fishers and fish handlers at fish market stations	Trained independent fishers on seafood handling standards		





Seafood Processing	15	To support access to new and strategic niche markets with the assistance of BELTRAIDE and other government agencies.	Hire marketing consultant to conduct market research and branding of seafood products	Branding campaign
		To support export-oriented seafood business establishments to increase revenue generation through use of smart marketing techniques (market intelligence gathering, sale/export of fishery products during highest demand/highest tourism periods)	Conduct workshop on queen conch export quota revision to account for by-products	Revised quota system to include by-products
			Conduct queen conch pearl harvest and export assessment	Report of the queen conch pearl niche market and export capacity and viability
			Determine and institute queen conch pearl export criteria and regulations	Queen conch pearl harvest and export regulations
		Incorporate technological tools to increase market access and value addition for seafood products.	Expand traceability system to include Queen Conch and other species (acquisition of software, tablets, label printing)	Multispecies traceability system
			Monitoring, upkeep of traceability system and reporting	
		Support the application to other certification programs to increase market access, innovation, and competitiveness in the seafood sector.	Open dialogue with Seafood Watch and independent parties to conduct assessment on Queen Conch and Spiny Lobster fishery sustainability	Report and action plan on removing Belize's seafood products from "avoid" category
			Develop Fisheries Improvement Programme for seafood & its preparedness for certification	Program to assist queen conch industry in addressing weaknesses in sustainable fisheries
			Conduct feasibility study on seafood certification programs such as MSC and FishChoice for spiny lobster and queen conch seafood certification	Report and recommendations on seafood certification programs that may add value to Belize's seafood brand
		To support increased domestic use (lobster head meat) and marketing, including export of currently discarded fishery biproducts such as queen conch trimming that can potentially generate additional revenue to stakeholders.	Conduct market study for queen conch to identify additional niche markets (eg. By-products from pearls, trimmings, shells, operculum)	Market analysis and recommended actions for market access
			Conduct market study for spiny lobster to identify additional niche markets such as food flavoring and pharmaceuticals	Market analysis and recommended actions for market access



Thank you!



PHOTO: EMAUN HYDE