


# Evidence-based and policy coherent Oceans Economy and Trade Strategies<sup>1</sup>. Sector data factsheet<sup>2</sup>: Belize

## MARINE FISHERIES

### 1. INTRODUCTION

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The project “Evidence-based and policy coherent Oceans Economy and Trade Strategies” aims to support developing countries such as Barbados, Belize and Costa Rica, in realizing trade and economic benefits from the sustainable use of marine resources within the framework of the 1982 United Nations Convention on the Law of the Sea (UNCLOS). This data factsheet present detailed sectorial information of one (of the four) ocean sector selected in Belize to facilitate the identification and informed selection of key sectors to be considered for the next phase of the project:

 Sector 1	Sector 2	Sector 3	Sector 4
Marine fisheries	Aquaculture	Seafood manufacturing	Tourism

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#### DEFINITION

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There is no internationally agreed definition of “sustainable fisheries”. One common understanding of this term makes reference to fishing activities that can be continued on a sustained or indefinite basis due the renewable nature of the resource. A more methodological approach makes reference to the application of the maximum sustainable yield (MSY) as reflected in the UNCLOS and the UNFSA, in some cases updated by economic and social considerations. On an institutional basis, ‘sustainable fisheries’ can be perceived to be fishing practices and actions that follow, and effectively apply, relevant international agreements, guidelines and best practices agreed. (Source: *Sustainable Fisheries: International Trade, Trade Policy and Regulatory Issues*. UNCTAD, 2016).

Marine fisheries are usually defined as the industry or occupation devoted to the catching, processing, or selling of fish, shellfish, other aquatic animals, except tuna.<sup>3</sup> The fisheries sector plays a significant role in the economic development, food security, employment and livelihoods of coastal populations. It is an important contributor to economic development and food security, especially of SIDS and LDCs, even though its average share in GDP ranges from about 3 per cent in SIDS to a low of less than 1 per cent for other countries, especially developed ones. Value addition and diversification in the fisheries sector can expand livelihood opportunities, create jobs and expand internal downward and upward economic linkages in goods and services provision. Exports of marine products may also positively contribute to the economic and social development of the communities involved in the sector.

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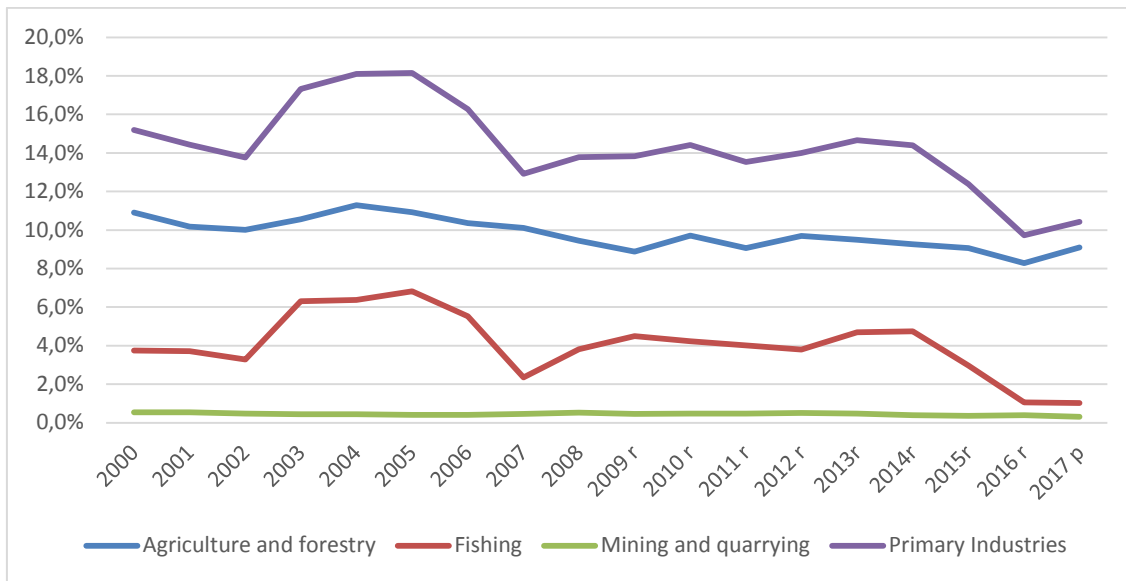
<sup>3</sup> An exhaustive list of the products included in the analysis thereafter is provided in the Table A2 of the Appendix. Product definitions are based on the 2012 version of the Harmonized system classification.

The evolution of the contribution to GDP of major primary sectors in Belize is reported in Figure 1. The Agriculture and forestry sector remains the largest sector with a share in GDP varying between 8 and about 12 percent during the 200-2017 period. The tendency for the sector however is a declining one. The fishing sector is the second largest contributors to GDP amongst primary industries. At its highest its share was about 7 percent. Lately, its contribution to GDP fell to slightly more than 1 percent driven to a large extent by the collapse of the aquaculture production.

Figure 2 depicts the evolution since the year 2000 of the per capita supply of fish and fisheries products of both Belize and the World average. After few years of convergence observed at the beginning of the period under consideration, supply per capita has been decreasing in Belize while the world trend remains an increasing one. As to the external sector, that while imports have shown some downward tendency over the last fifteen years, the evolution of exports have been more erratic over that same period. As Figure 3 shows exports (Aquaculture products included) evolution however has been negative between 2014 and 2016 and at best nil between 2016 and 2017. Trade balance as shown a similar pattern as the value of imports remains significantly smaller than that of exports. The exports to imports ratio was equal to 117 in 2014. It jumped down to 53 in 2016 to stand at 84 in 2017.

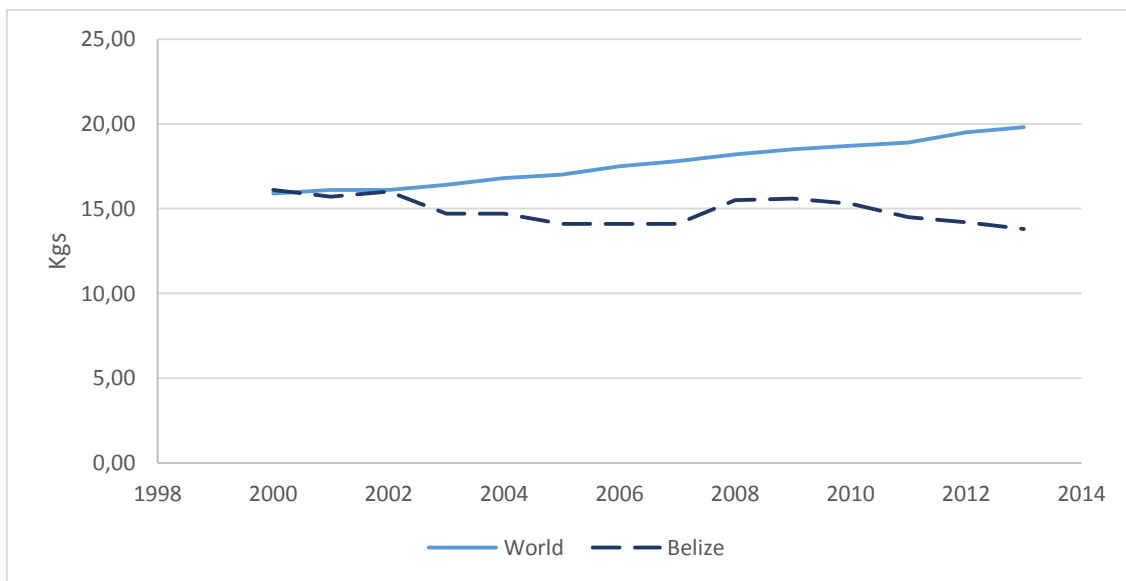
There is clearly some uncertainty concerning the evolution of supply capacity in the sector. A major challenge then may stay in the definition of a development strategy able to stabilize overall production in order to guarantee acceptable earnings and sustained regular employment in the sector as well as security in consumption. Such approach has already received support from FAO assistance shaped by the 2016-2019 FAO Country Programming Framework (CPF). One of its four priority areas is indeed the enhancement of trade in fisheries products, “with an emphasis on supporting the development and implementation of institutional frameworks and arrangements for improved markets, and promotion of a gender-sensitive value chain approach.”

**FIGURE 1: SHARE IN GDP AT CONSTANT PRICES: PRIMARY INDUSTRIES (2000-2017)**



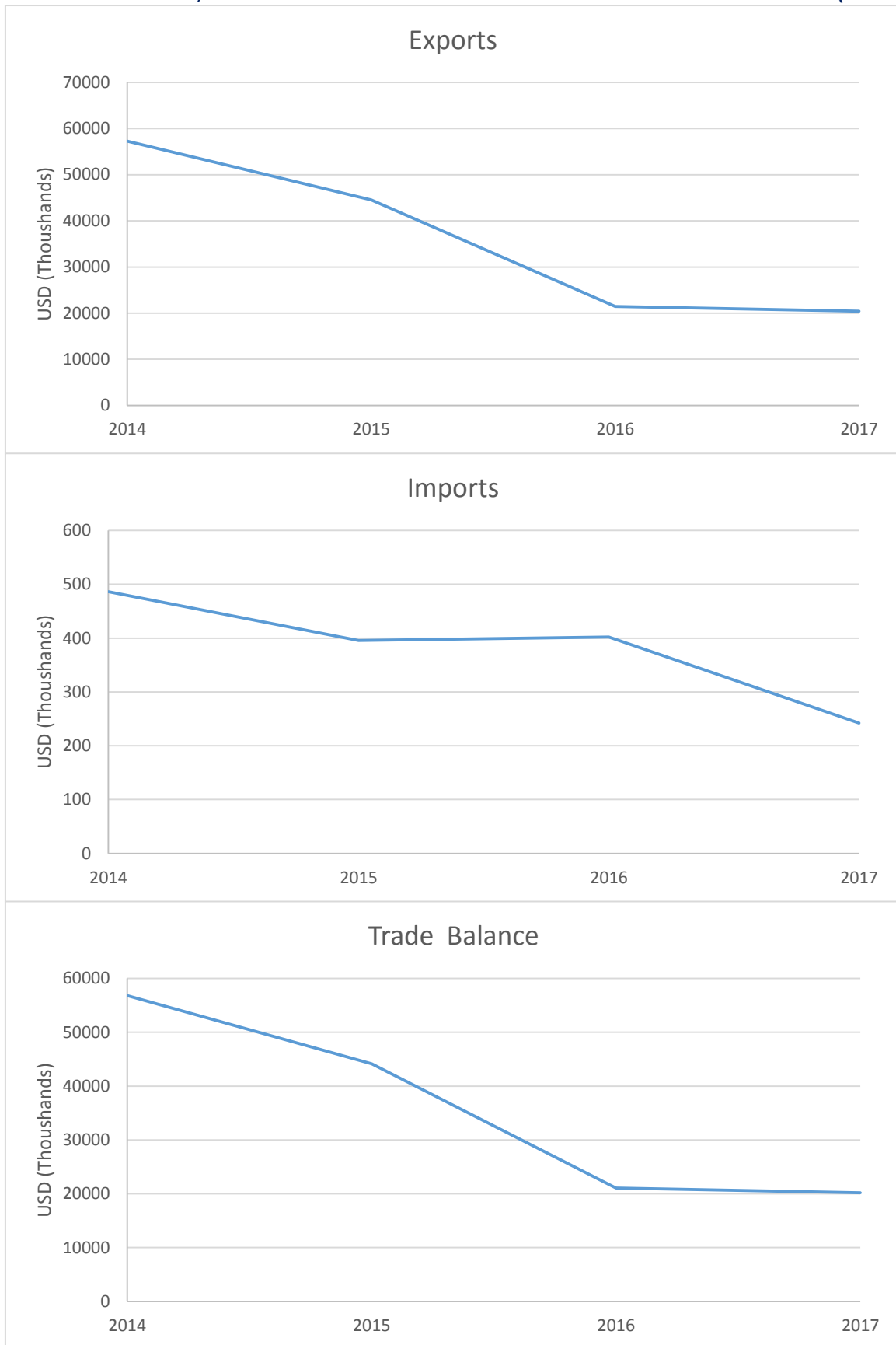
SOURCE: BELIZE STATISTICAL INSTITUTE

**FIGURE 2: PER CAPITA SUPPLY OF FISH AND FISHERIES PRODUCTS**



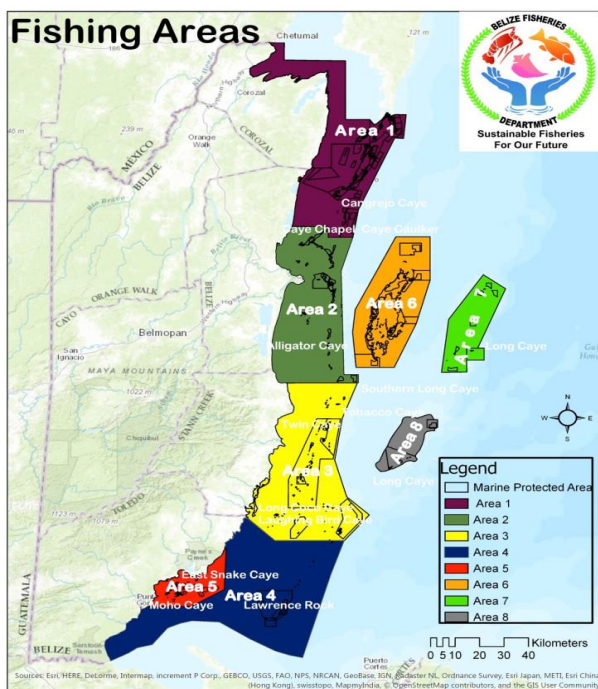
SOURCE: FAO FISHSTAT

**FIGURE 3: EXPORTS, IMPORTS AND TRADE BALANCE OF FISH AND FISHERIES PRODUCTS (2000-2017)**



SOURCE: COMTRADE IN WITS (BASED ON BELIZE REPORTING). AQUACULTURE PRODUCTS ARE INCLUDED.

## 2. THE BELIZEAN CONTEXT: MARINE FISHERIES



**Land:** 22 966 km<sup>2</sup>  
**Coasts length:** 386 km  
**Economic structure of the GDP (2016):** agriculture and fisheries made 11.7 % of GDP, industry 14.4 % and services 59.9 %. Tourism alone represents almost one fourth of GDP.  
**Fisheries and aquaculture as a percentage of GDP:** 3%  
**Main landing points:** Belize City, San Pedro, Placencia and Punta Gorda

(Map of Belize with main 8 fishing areas. Source Belize Fisheries Department. See: <https://belizeinvest.net/2018/05/02/managed-access-a-rights%E2%80%90based-approach-to-managing-small-scale-fisheries-in-belize/> )

While Belize has a Caribbean coastline of 386 km, it hosts a portion of the second largest coral reef in the world (the Mesoamerican Barrier Reef) which provides for enormous opportunities for sustainable use of marine resources as well as management challenges. Coastal fisheries mainly focus on three resources: lobster, conch, and finfish. High seas fishing mostly harvest tuna species.

## 3. PRODUCTION

### 3.1. TOTAL CAPTURE

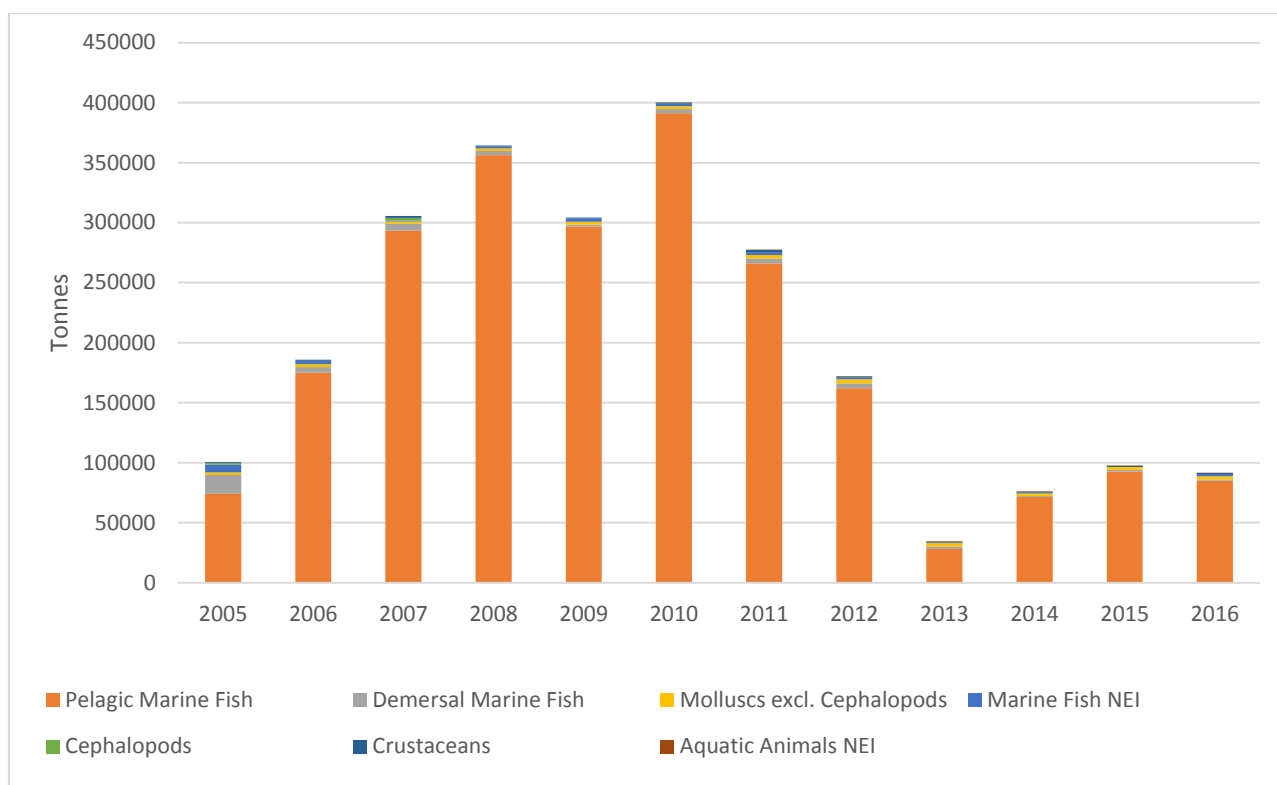
Total capture production has been recovering timidly since the collapse of 2013. In 2016, it stood at slightly more than 91000 tonnes after falling to less than 35000 tonnes in 2013 as reported in Figure 4. It further indicates that capture production has been driven essentially by catches of Pelagic Marine fish species mainly in international waters.

Capture fisheries production in coastal waters mainly concentrates on two valuable resources: lobster and queen conch. The Lobster annual production is quite stable with an average of about 650 tonnes per year in the 2008-2014 period and of about 700 tonnes per year between 2012 and 2016. It was about 436 in 2005. However, the production of conch which has shown stable until 2013 around 3 000 tonnes, in 2014 has dropped sharply to 2 000 tonnes to jump back to about 2700 tonnes in 2016. The total production in coastal waters was in the years 2014 to 2016 varied between 3300 and 3500 tonnes.

As shown in panels (a) and (b) of Figure 5 several species from various groups were captured on a non-permanent basis. The case of sea cucumber is worth mentioning. Its extraction has decreased sharply between 2012 and 2016. This has been essentially the consequence of an increasingly tighter control from Belize authorities to maintain its presence in domestic waters put at risk due to an always increasing demand in Asian markets. The Fisheries Administrator decided that the extraction for all species of sea cucumber would remain closed for 2017. Its production in aquaculture is now under consideration and may be launched shortly as discussed in the fact sheet on Aquaculture products.<sup>4</sup>

Belize is an “open registry” State, with a number of non-locally owned fishing vessels flying its flag. Currently, Belize reported 60 vessels being authorized to operate in the high seas under the 1995 FAO Compliance Agreement. Information on catches by vessels registered in Belize but operating in offshore waters is available only from sources external to the country. Tuna catches from these vessels have been around an average of 4 000 tonnes per year since 2005 but increased up to 24 000 tonnes in 2012 and then decreased to about 17 000 tonnes in 2016. Whereas catches of other species, mainly small pelagic species (e.g. sardines, mackerels, anchovies) from Eastern Central Atlantic, peaked in 2010 at around 400 000 tonnes but decreased dramatically until 2013. In 2016 production was about 85 000 tonnes. Capture of costal fishes also declined sharply from 2013 to 2015. Total capture was equal to 800 tonnes in 2012 but shrunk to 34 tonnes in 2014 and to 20 tonnes in 2015. In 2016 capture jumped up to about 190 tonnes.

**FIGURE 4: CAPTURE PRODUCTION (BY GROUPS OF SPECIES) 2005-2016**

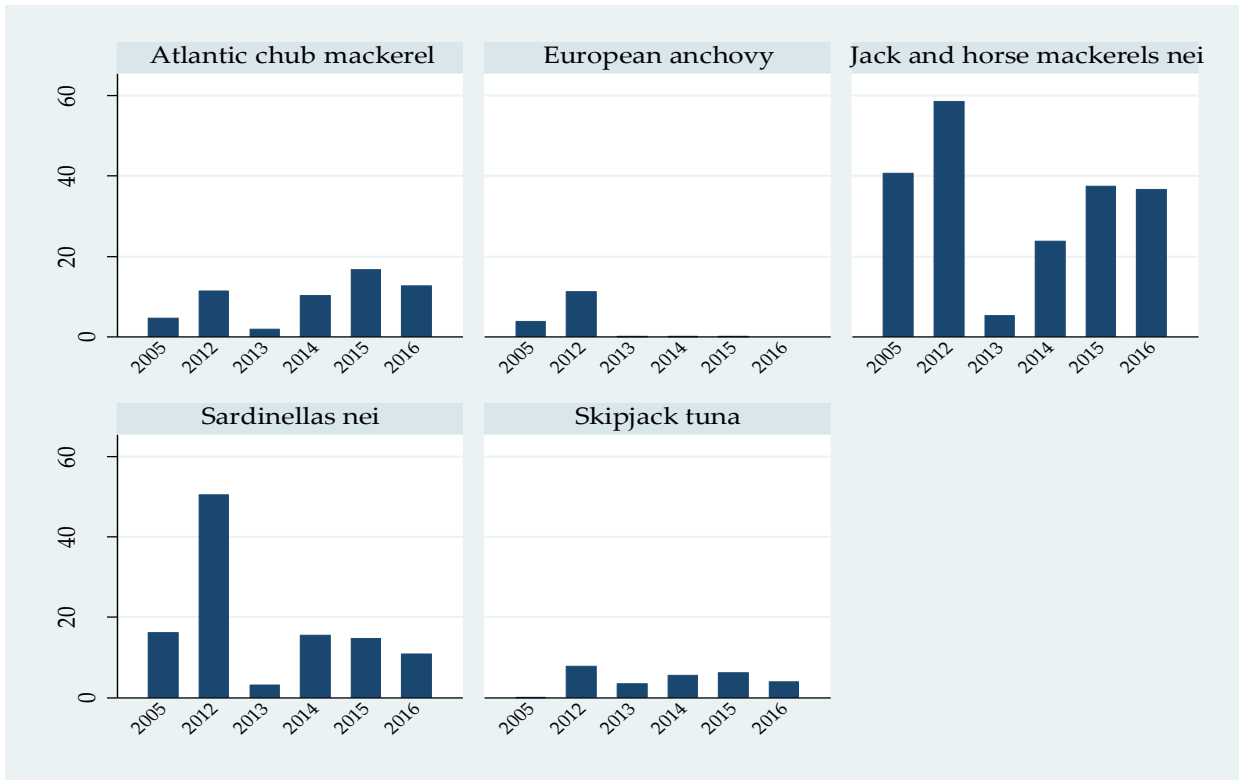


SOURCE: FAO FISHSTAT

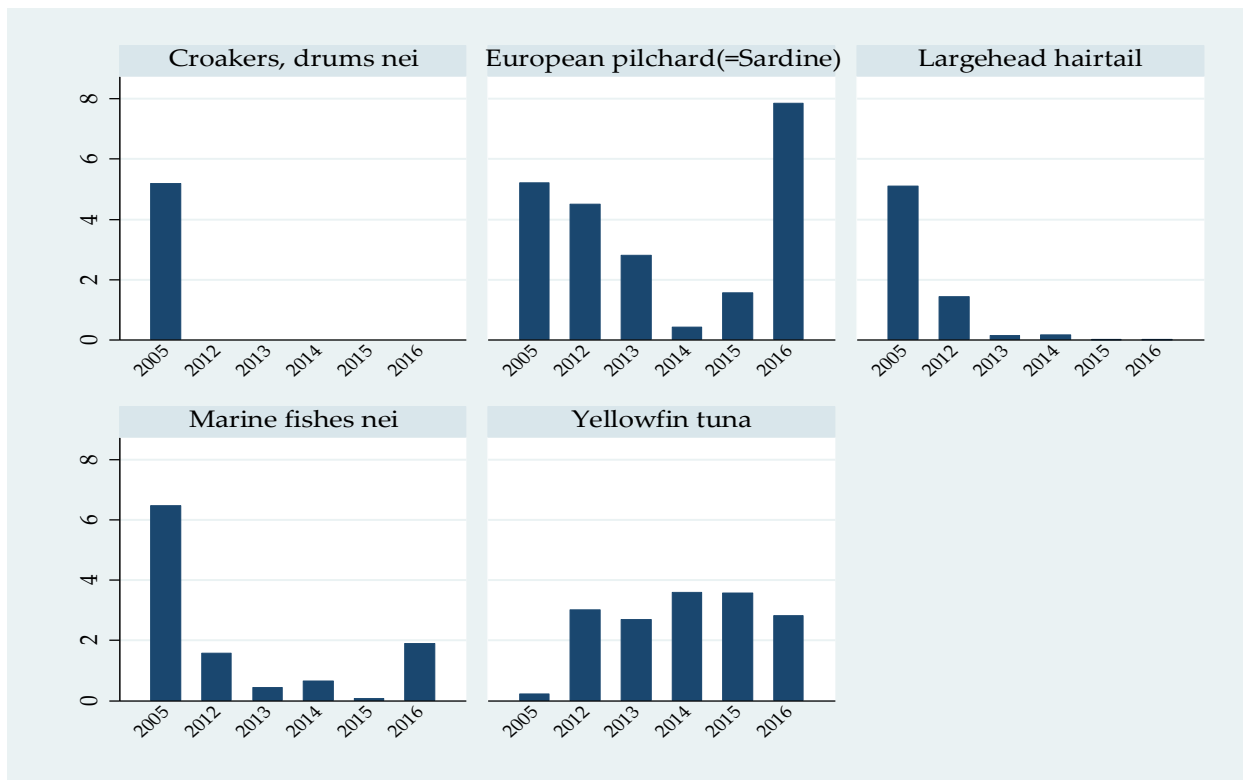
<sup>4</sup> See: <http://www.uberibz.org/single-post/2017/01/27/Sea-Cucumber-Mariculture-Grow-out>

FIGURE 5: CAPTURE PRODUCTION BY SPECIES 2005, 2012-2016

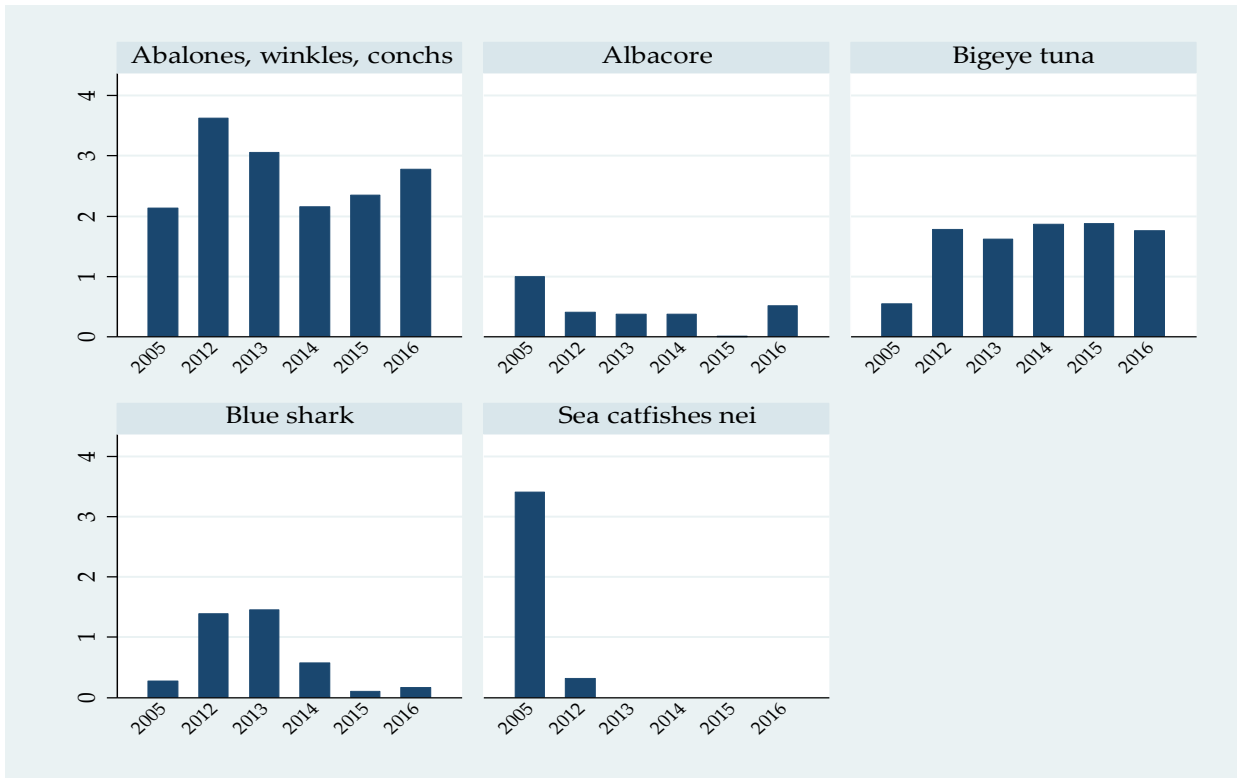
(a)



(b)



(c)

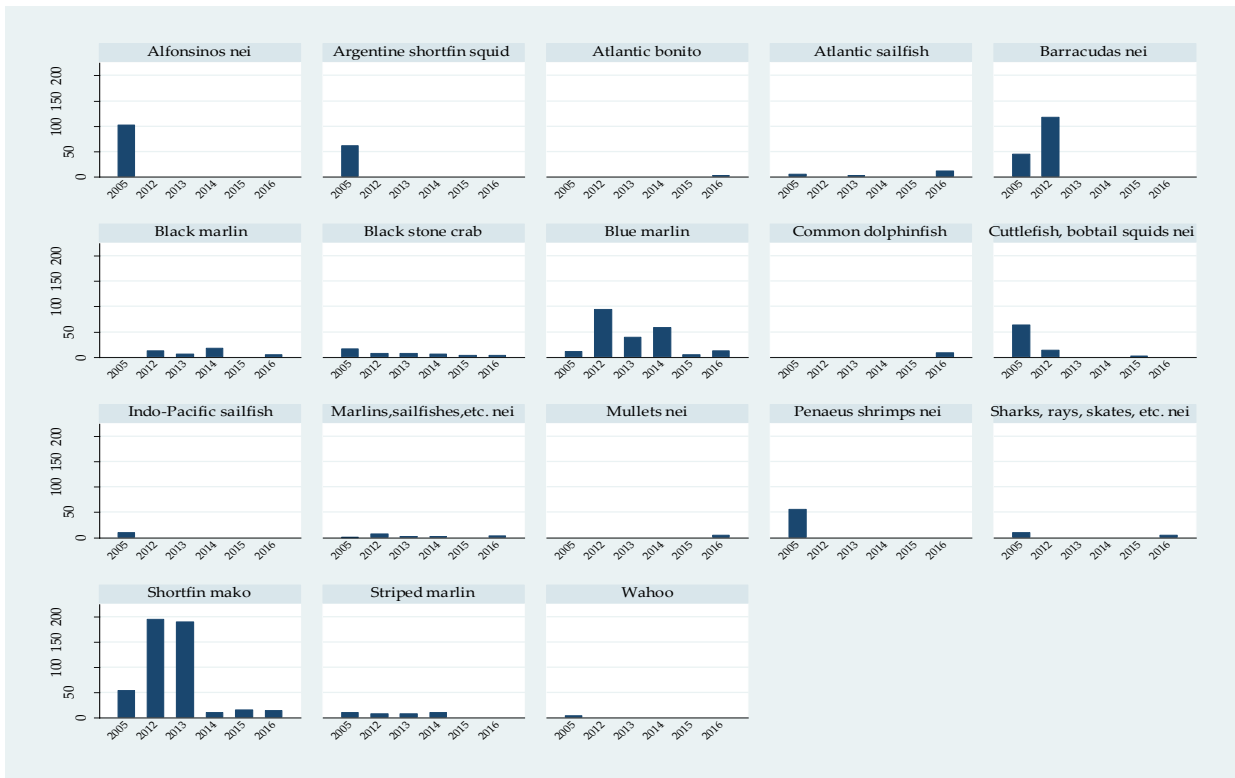


(d)





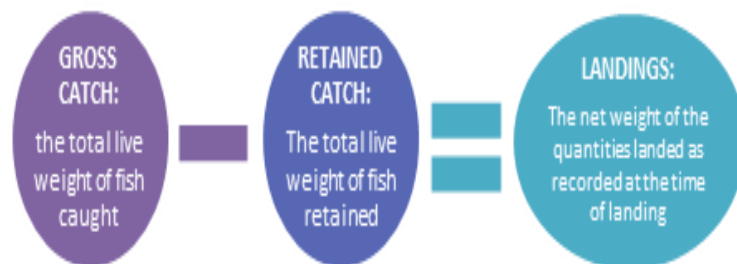
(e)



SOURCE: FAO FISHSTAT

NOTE: PANEL (A) INCLUDES SPECIES WITH CATCHES LARGER THAN 10000 TONNES. PANEL (B) INCLUDES SPECIES WITH CATCHES BETWEEN 5000 TONNES AND 10000 TONNES. PANEL (C) INCLUDES SPECIES WITH CATCHES BETWEEN 1000 AND 5000 TONNES. PANEL (D) INCLUDES SPECIES WITH CATCHES BETWEEN 200 AND 1000 TONNES. PANEL (E) INCLUDES SPECIES WITH CATCHES OF LESS THAN 200 TONNES.

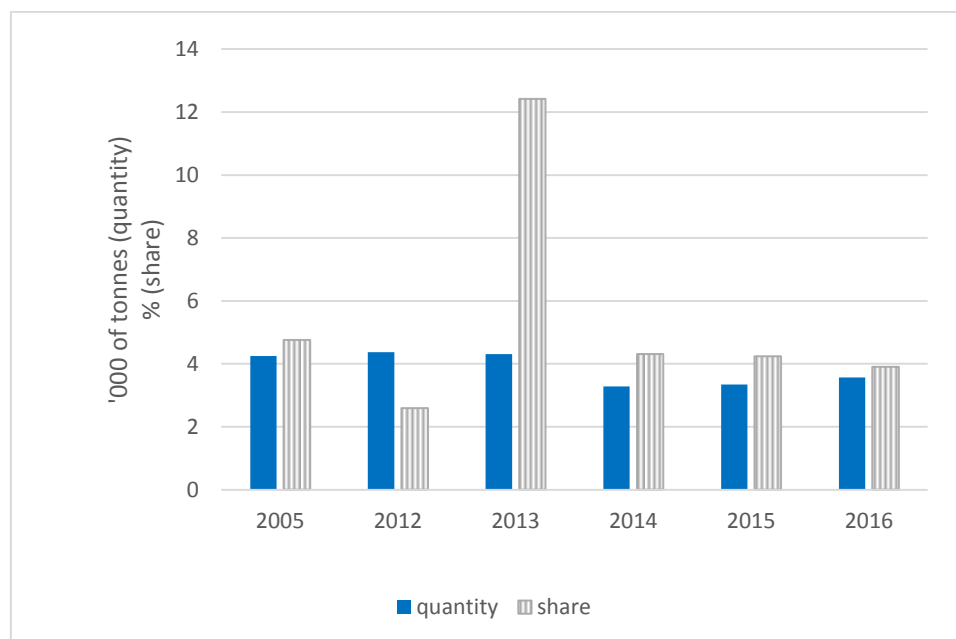
### 3.2. LANDINGS



Information on landings is not systematically reported in international data sources. However, as mentioned previously most pelagic marine fish is caught by vessels with Belize flag but landing in other territories. As discussed below in more detail this is reflected in data as reported by Belize trade partners. For instance, exports declared by Belize do not include any Tuna product while imports declared by trading partners may include such products. This is most probably linked to landings abroad from vessels registered with Belize authorities. Figure 6 reports rough estimates of landings based on the assumption that species not reported as exports but appearing as imports of Belize trade partners are not landed. This group consists of essentially

pelagic marine fish species. Landings have been relatively constant over the last decade showing some recovery pattern since the 2013 inflexion. They were equivalent to about 4 percent of total capture production registered on vessels with Belize flag and correspond to about 3700 tonnes in 2016.

**FIGURE 6: LANDINGS 2005-2016 (QUANTITY AND SHARE IN TOTAL CAPTURE PRODUCTION)**



Source: UNCTAD’s estimates based on FAO FishSTAT and COMTRADE data

### 3.3. LICENSES AND FLEETS

#### LICENSES

In 2018, some of types of licenses fees (prices in BZD) set by the Fisheries Department for coastal fisheries (within the EEZ) are reported in Table 1.

**TABLE 1: LICENCE FEES FOR COASTAL FISHERIES**

Type of License	Price
Commercial fish folks’ licences (New and Renewal)	\$25
Card Replacement	\$10
Vessel License under 20’	\$15
Vessel License over 20’	\$25
Researcher license	\$500 inside any protected area and \$250 outside a protected area

SOURCE: BELIZE FISHERIES DEPARTMENT (2018)

## FISHING FLEETS

A **fishing vessel** is defined as “any vessel used or intended for use for the commercial exploitation of living marine resources, including mother ships and any other vessels directly engaged in such operation” (High Seas Fisheries Act, 2013)

Artisanal fishing is carried out by about **500 boats** operating in the shallow waters of the barrier reef and the three atolls, which provide habitats for many commercially valuable stocks of lobster, conch, and a variety of fish (WTO (2017)).<sup>5</sup> There are about **2500 fishers licensed** in Belize to operate under the EEZ, indirectly employing 15,000 individuals and organized in four cooperatives.<sup>6</sup> According to the High Seas Unit, there were **34 vessels** listed as active in 2016.<sup>7</sup> This number has increased to about **57 vessels** in 2018. This list applies only to vessels authorized to fish in areas beyond national jurisdiction (outside the EEZ).

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<sup>5</sup> Source: Belize’s Trade policy review. WT/TPR/S/238 and WT/TPR/S/353.

<sup>6</sup> Source: Belize Fisheries Department (2018).

<sup>7</sup> See: <https://www.bhsfu.gov.bz/wp-content/uploads/2014/10/List-of-Active-Fishing-Vessels.pdf>

## 4. TRADE

### 4.1. OVERVIEW

As commented previously, the value of total exports of fish and fisheries products are found to decrease significantly since 2014 after a period of strong recovery started in 2010. However as suggested by figures contained in Table 2 this downward tendency seems to be the consequence of a collapse in exports of aquaculture products. Exports value of marine products steadily increase from 12.9 millions in 2014 to 14.6 millions in 2017 despite ups and downs in quantities eventually reflecting some prices evolutions mostly favourable to Belize exporters. The share of marine products in total exports has increased significantly due to the general downward trend observed during the 2014-2017 period moving from slightly more than 4 percent in 2014 to 6.5 percent in 2017. Although we may want to interpret this fact as a positive one, it may also be related to the collapse of the aquaculture sector in 2015 to due to the outbreak of the EMS shrimp disease. The number of destinations has dropped form 18 in 2014 to 12 in 2017. The total number of exporter products has also decreased by one third from 21 in 2014 to 14 in 2017.

**TABLE 2: EXPORTS, NUMBER OF PRODUCTS, NUMBER OF DESTINATIONS, 2014-2017**

	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
<b>EXPORTS VALUE (US\$ MILLIONS)</b>	<b>12.9</b>	<b>13.6</b>	<b>14</b>	<b>14.6</b>
<b>EXPORTS QTY (TONNES)</b>	<b>1875.4</b>	<b>1610.4</b>	<b>1880.2</b>	<b>1691.2</b>
<b>NUMBER OF DESTINATIONS</b>	<b>18</b>	<b>15</b>	<b>15</b>	<b>12</b>
<b>NUMBER OF PRODUCTS</b>	<b>21</b>	<b>15</b>	<b>14</b>	<b>14</b>
<b>TOTAL EXPORTS (US\$ MILLIONS)</b>	<b>307</b>	<b>268</b>	<b>201</b>	<b>223</b>
<b>SHARE IN TOTAL</b>	<b>4.2%</b>	<b>5.1%</b>	<b>7.0%</b>	<b>6.5%</b>

SOURCE: COMTRADE IN WITS (EXPORTS DATA)

NOTE 1: AQUACULTURE PRODUCTS ARE NOT INCLUDED IN ANY CALCULATION.

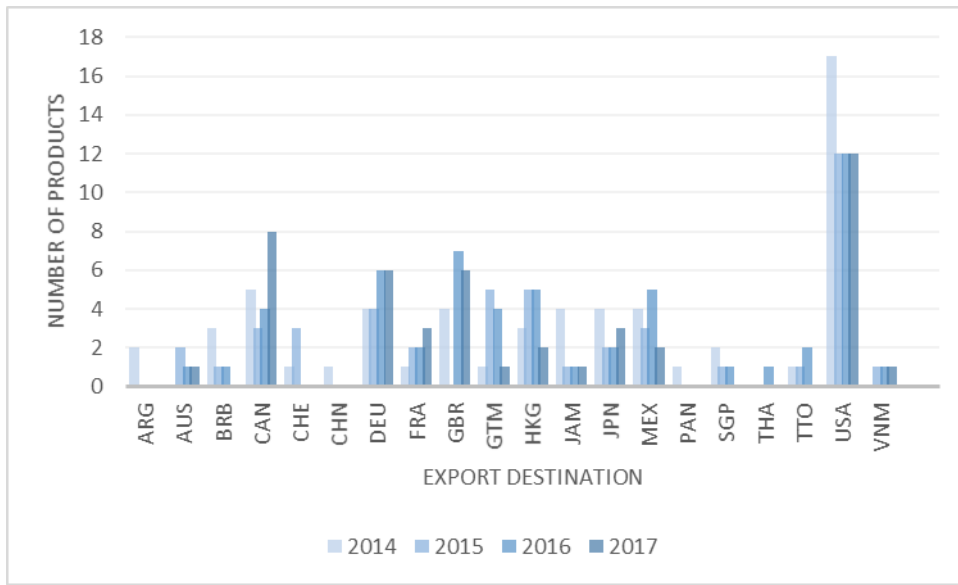
NOTE 2: TRADE DATA BASED ON THE 2012 VERSION OF THE HS CLASSIFICATION ARE AVAILABLE ONLY SINCE 2014 FOR BELIZE.

NOTE 3: DATA REFLECT EXPORT FLOWS AS DECLARED BY THE COMPETENT AUTHORITY TO THE UN STATISTICAL DIVISION.

Figure 7 shows how the product destination composition has evolved during the 2014-2017 period. The United States of America represent the most important destination although the number of products reaching their market has decreased. Then follow Canada, Great Britain and Germany with half of the products sent to the USA market. Late incomers are Eastern Asian countries such as Vietnam and Singapore. Exports to China were interrupted in 2015 as a result of the interruption of sea cucumber harvesting.

Figure 8 reports major export destinations in terms of value share. The share of the United States of America remarkably increased in no more than four years moving from 33.5 percent to about 68 percent. At the same time, the share of exports to Mexico simply collapsed from about 47 percent in 2014 to a mere 2.1 percent three years later.

**FIGURE 7: NUMBER OF PRODUCTS PER DESTINATION: 2014-2017**

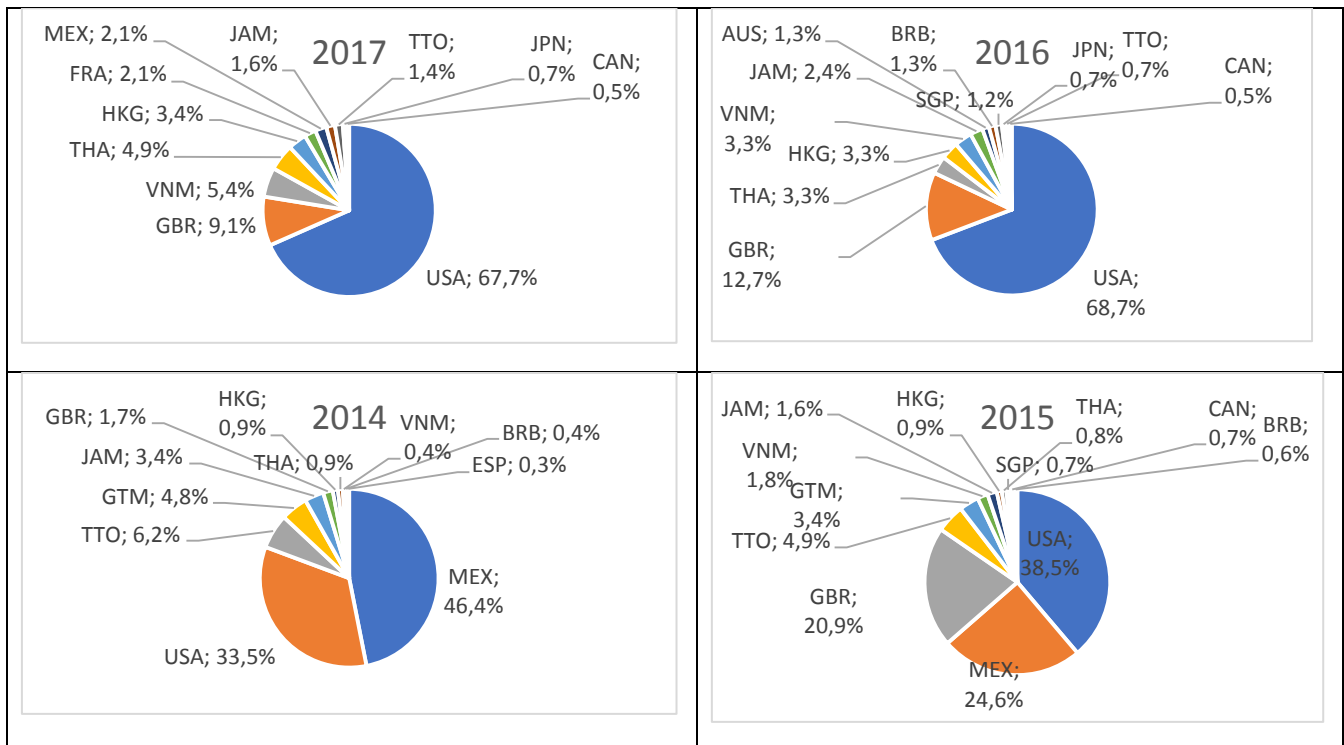


SOURCE: COMTRADE IN WITS (EXPORTS DATA)

NOTE 1: AQUACULTURE PRODUCTS ARE NOT INCLUDED IN ANY CALCULATION.

NOTE 2: THE NUMBER OF PRODUCTS IS DEFINED USING THE HS 2012 VERSION CLASSIFICATION AND ARE REPORTED IN TABLE A2 OF THE APPENDIX.

**FIGURE 8: MAJOR EXPORT DESTINATIONS 2014-2017**



SOURCE: COMTRADE IN WITS (EXPORTS DATA)

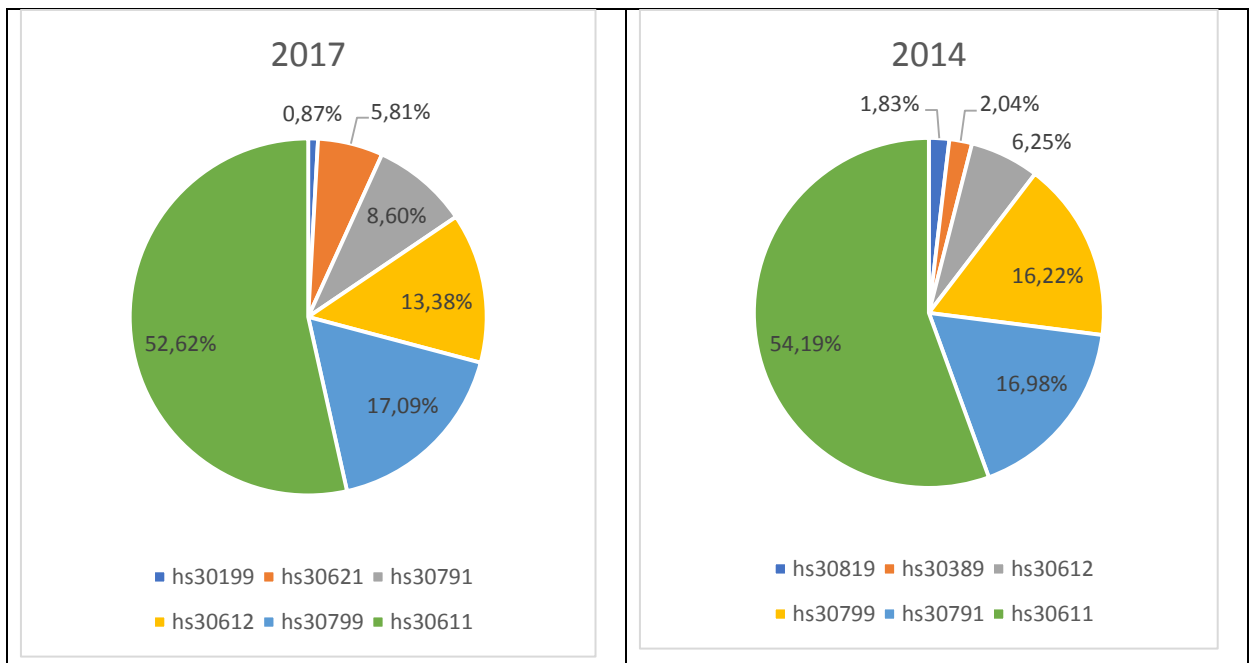
NOTE: AQUACULTURE PRODUCTS ARE NOT INCLUDED IN ANY CALCULATION.

## 4.2. SUPPLY CAPACITIES

As shown in Figure 9, export composition reflects capture production composition. Frozen lobsters as represented by products hs30611 and hs30612 and hs30621 are the main exported product in both 2014 and 2017 followed by Queen conchs as represented by products hs30799 and hs30791. Lobsters share increased from about 60 percent in 2014 to about 72 percent in 2017. As to Queen conchs their share fell from 33 percent in 2014 to about 26 percent in 2017. Interestingly, while lobster and conch exports are not huge in volume (see figure 7), they are very significant in exports value.

Not surprisingly sea cucumbers disappeared from the list of exported products in 2017 while Ornamental fishes became the sixth most important product exported. The latter share is less than 1 percent though showing potential for Blue BioTrade activities (UNCTAD, 2018).

**FIGURE 9: MAJOR PRODUCTS EXPORTED IN 2014 AND 2017**



SOURCE: COMTRADE IN WITS (EXPORTS DATA)

NOTE 1: Relevant HS codes for marine fisheries products are shown in table A1 in the appendix.

NOTE 2: **hs30611**: FROZEN ROCK LOBSTER AND OTHER SEA CRAWFISH (PALINURUS SPP., PANULIRUS SPP., JASUS SPP.); **hs30799**: OTHER MOLLUSCS including flours, meals and pellets, fit for human consumption (OTHER THAN Live, fresh or chilled); **hs30612**: FROZEN LOBSTERS (HOMARUS SPP.); **hs30791**: OTHER MOLLUSCS including flours, meals and pellets, fit for human consumption (Live, fresh or chilled); **hs30621**: NOT FROZEN ROCK LOBSTER AND OTHER SEA CRAWFISH (PALINURUS SPP., PANULIRUS SPP., JASUS); **hs30389**: OTHER FROZEN FISH; **hs30819**: Sea cucumbers (Stichopus japonicus, Holothurioidea) other than Live, fresh or chilled; **hs30199**: OTHER ORNAMENTAL FISH

## 4.3. DEMAND

Demand dynamics can be appreciated, although roughly, by looking at the evolution of imports in both value and quantity terms. Figure 10 shows as demand for products exported by Belize has changed in their destination markets. Growth rates represented are the average of yearly growth rates computed between

2014 and 2017. Figures appear to be negative for several products. Frozen lobsters remain the most dynamic product Belize export destination markets.

**FIGURE 10: AVERAGE IMPORT GROWTH IN BLZ'S DESTINATION MARKETS (2014-2017)**



SOURCE: COMTRADE IN WITS (EXPORTS DATA)  
 NOTE: GROWTH RATES LARGER THAN 100% ARE EXCLUDED

**FIGURE 11: AVERAGE IMPORT GROWTH IN WORLD MARKETS (2014-2017)**



SOURCE: COMTRADE IN WITS (EXPORTS DATA)  
 NOTE: GROWTH RATES LARGER THAN 100% ARE EXCLUDED

Figure 11 computes similar average growth rates but including all possible destinations. Generally speaking growth figures are even less encouraging than those obtained for historical Belize export markets. There are either negative or only slightly positive. This may be interpreted as a warning to any sectoral development strategy focusing exclusively on non-processed products.

Calculations behind Figures 10 and 11 were voluntarily based on growth rates strictly below 100 percent in order to avoid any possible bias the appearance of new markets would induce. By looking at these outlying observations some additional information can be retrieved. We observe that particularly dynamic demand in Belize destination markets is obtained for products 030383 (frozen toothfish), 0303611 (frozen Rock lobster), and 030789 (Abalone other than live fresh or chilled). Particularly dynamic importing countries appear to be Vietnam, Thailand, Argentina, China, Guatemala and Great Britain.

**TABLE 3: DYNAMIC DEMAND IN 2014-2017**

	VNM	THA	ARG	CHN	GBR	GTM
30111	X					
30199	X					X
30355						
30383				X	X	
30389						
30499			X		X	
30569				X	X	
30611		X	X	X		X
30612		X				
30621	X	X				X
30624	X	X	X			X
30629		X	X			
30711	X					
30739		X				
30760	X			X		
30771					X	
30779			X			X
30789	X				X	
30791	X					X
30799	X		X			
30819						
30821	X	X				
30890	X	X		X		

NOTE: CROSSES INDICATE AT LEAST ONE RECORDED GROWTH RATE DURING THE 2014-2017 PERIOD LARGER THAN 100%.

## 4.4. DISCREPANCIES BETWEEN EXPORTS AND MIRROR IMPORTS DATA

Trade flows as reported in UN COMTRADE are in principal declared twice: once by the exporting country and once by the importing country as long as a trade flow exists. The difference between the values declared by each side of the trade relationship should reflect the freight and insurance costs. In practice the incidence of orphan observations could be relatively high especially at the product (e.g. 6-digit in the HS classification). Orphans refer to those observations which are declared by the exporting country but not the importing one or vice versa. It may also be that a trade flow is not reported by either side of the relationship. The latter case is clearly extremely difficult if not impossible to identify.

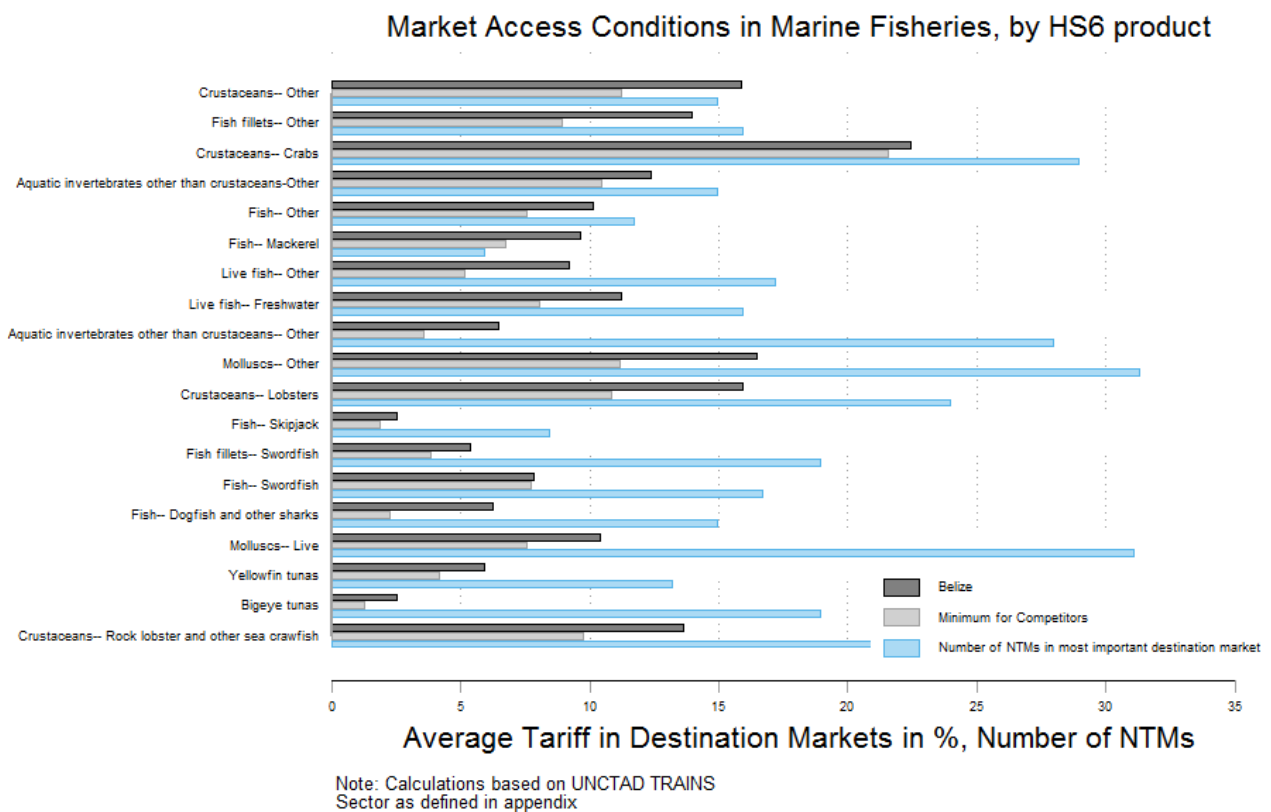


Belize exports of fish and fisheries products are no exception. Based on importing countries declarations Belize exports would amount to more than 34 million of USD which is more than twice the value of the declared exports. In 2017, Belize capture products are exported to 23 countries not 12 as found on the exports side. The number of capture products exported in 2017 is 33 as opposed to the 14 registered as exports for the very same year. The reason for such discrepancies is likely to be linked to the open registry approach adopted by the Belize authorities and landings in third countries. This may not be dramatic as such but it certainly requires more attention. For instance, imports of frozen tuna from Belize flagged vessels appear to be worth about 17 millions USD and amount to circa 6500 tonnes.

## 4.5. MARKET ACCESS CONDITIONS

Beside supply side capacity and competitiveness, the level of market access (tariff and non-tariff measures) is another important determinant for the export success.

**FIGURE 12: TARIFFS AND NTMS**



Belize marine fisheries exports tend to face higher tariffs than its competitors as shown in Figure 12. In many cases tariffs go beyond average applied and WTO favourable tariffs. Becoming a Party to the UNCTAD's General System of Trade Preferences among Developing countries could be a good option to reduce tariff barriers for Belize. The average number of NTMs is high for Belize exports. NTMs are not voluntary standards but mandatory regulations to be able to commercialise in the internal market of importing countries. While this is not surprising in the fisheries sector where NTMs are 2.5 times more common than in manufactures (UNCTAD, 2016 and Fugazza, 2017), it is a worrisome factor. A more specific mapping will be

necessary to understand the number, nature, typology and impact of these measures on Belize exports. Again, a more targeted trade strategy seems greatly needed to secure access to key markets.

## 5. ENVIRONMENT

Belize is internationally known for its environmental conservation efforts and great care of its ocean facade. The Belize Barrier Reef Reserve System is part of the UNESCO World Heritage sites list since 1996. Belize is Party and has implemented various relevant multilateral environmental agreements including CITES, CBD, and the Inter-American Convention for the Protection and Conservation of Sea Turtles (2001)-(IACST) to protect biodiversity and marine species. More recently, Belize issued an indefinite moratorium on oil, gas and mining exploration (2017).

Belize has been a leader in the creation of nine Marine Protected Areas (MPA) in the Caribbean that are directly managed or co-managed by the Belize Fisheries Department (BFD). It has also declared three marine national parks, two natural monuments, twelve fish spawning aggregations sites and two marine wildlife sanctuaries. All the above cover a surface of some 4,051 km<sup>2</sup> (or 21.6 % of Belize territorial seas). Minister Omar Figueroa speech at CARICOM (2017).

The Belize Fisheries Act (last revised, 2000) regulates fishing in Belize in terms of the types of commercial activities that are allowed within their EEZ. The act regulates the issuing of different types of licences for fishing, scientific research; export of marine products and the types of nets and gear allowed for fishing. It also strictly regulates and limits the use of poison, explosives and other types of destructive practices. The Act also establishes, controls and regulates marine reserves. For activities by fishing vessels in the high seas, including measures against Illegal, Unreported and Unregulated (IUU) Fishing and pollution control, the main regulation is the High Seas Fishing Act (2013).

## 6. EMPLOYMENT

According to FAO statistics based on national sources, employment in the capture production sector represents the bulk of employment in the fish industry especially after the recent collapse of the aquaculture production of Whiteleg shrimps in 2015. Unfortunately, statistics are not available at a very disaggregated level. Figures reported in Table 3 indicate that the share of employment in the capture production represents 10 to 12 percent of employment in the primary sector. The latter recently represented no more that 15 to 16 percent of total employment.

**TABLE 4: EMPLOYMENT IN THE CAPTURE PRODUCTION FISH SECTOR**

	1990	2000	2010	2011	2012	2013	2014	2015	2016	2017
Capture	1.75	1.87	2.47		2.76	2.5	2.43			
Primary Industry	17	20	21	21	22	22	23	23	23	24
Share in Primary	10.3%	9.4%	11.8%		12.5%	11.4%	10.6%			

Source: FAO statistics and ILOSTAT

## 7. RELEVANT INTERNATIONAL REGULATORY FRAMEWORK

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Belize is Party to the following Agreements:

### 1. International Trade Treaties:

- a. World Trade Organisation (WTO) and goods and services related Uruguay Round Agreements (1994)
- b. The Economic Partnership Agreement between the EU and CARIFOURM (2008)
- c. Founding Member of CARICOM and the Member of the Central American Integration System (SICA)
- d. Various Free Trade Agreements with Colombia, Costa Rica, Cuba, Dominican Republic, Guatemala and Venezuela

### 2. Law of the Sea (for further analysis of the law of the sea and multilateral environmental agreements, see study on the law of the sea, regulatory and governance framework in selected ocean-based sectors by UNCTAD-DOALOS (2018).

- a. Convention on the Law of the Sea (1982)
- b. The United Nations Fish Stocks Agreement (1995)

### 3. Fisheries Agreements and Regional bodies

- a. Inter-American Tropical Tuna Commission (IATTC)
- b. Western Central Atlantic Fishery Commission (WECAFC)
- c. Indian Ocean Tuna Commission (IOTC)
- d. Latin American Organization for Fisheries Development (OLDEPESCA)
- e. Central America Fisheries and Aquaculture Organization (OSPESCA)
- f. Caribbean Regional Fisheries Mechanism (CRFM)

### 4. Environment:

- a. Convention on Biological Diversity (1992)
- b. Convention on International Trade in Endangered Species of Wild Fauna and Flora (1975)
- c. Inter-American Convention for the Protection and Conservation of Sea Turtles (2001)

# APPENDIX

## TABLE A1: ABBREVIATIONS

<b>BF</b>	Belize Fisheries Department
<b>SIB</b>	Statistical Institute of Belize
<b>DOALOS</b>	Division for Ocean Affairs and the Law of the Sea of the Office of Legal Affairs
<b>FAO</b>	Food and Agricultural Organisation
<b>LDC's</b>	Least Developed Countries
<b>OECD</b>	Organization for Economic Co-operation and Development
<b>OETS</b>	Oceans Economy and Trade Strategies
<b>RCA</b>	Revealed Comparative Advantage
<b>SIDS</b>	Small Island Development States
<b>UNCLOS</b>	United Nations Convention on the Law of the Sea
<b>UNCTAD</b>	United Nations Conference on Trade and Development
<b>UNDP</b>	United Nations Development Programme
<b>UNFSA</b>	United Nations Fish Stock Agreement
<b>WTO</b>	World Trade Organisation

## TABLE A2: PRODUCT DEFINITION

Sector	Product Name	HS6 Product code
Marine Fisheries	Live fish-- Freshwater	30111
Marine Fisheries	Live fish-- Other	30119
Marine Fisheries	Live fish-- Trout	30191
Marine Fisheries	Live fish-- Eels	30192
Marine Fisheries	Live fish-- Carp	30193
Marine Fisheries	Atlantic and Pacific bluefin tunas	30194
Marine Fisheries	Southern bluefin tunas	30195
Marine Fisheries	Live fish-- Other	30199
Marine Fisheries	Fish-- Trout	30211
Marine Fisheries	Fish-- Pacific salmon	30213
Marine Fisheries	Fish-- Atlantic salmon	30214
Marine Fisheries	Fish-- Other	30219
Marine Fisheries	Fish-- Halibut	30221
Marine Fisheries	Fish-- Plaice	30222
Marine Fisheries	Fish-- Sole	30223
Marine Fisheries	Fish-- Turbots	30224
Marine Fisheries	Fish-- Other	30229
Marine Fisheries	Albacore	30231
Marine Fisheries	Yellowfin tunas	30232
Marine Fisheries	Fish-- Skipjack	30233
Marine Fisheries	Bigeye tunas	30234
Marine Fisheries	Atlantic and Pacific bluefin tunas	30235
Marine Fisheries	Southern bluefin tunas	30236
Marine Fisheries	Fish-- Other	30239
Marine Fisheries	Fish-- Herrings	30241
Marine Fisheries	Fish-- Anchovies	30242

<b>Marine Fisheries</b>	Fish-- Sardines	30243
<b>Marine Fisheries</b>	Fish-- Mackerel	30244
<b>Marine Fisheries</b>	Fish-- Jack and horse mackerel	30245
<b>Marine Fisheries</b>	Fish-- Cobia	30246
<b>Marine Fisheries</b>	Fish-- Swordfish	30247
<b>Marine Fisheries</b>	Fish-- Cod	30251
<b>Marine Fisheries</b>	Fish-- Haddock	30252
<b>Marine Fisheries</b>	Fish-- Coalfish	30253
<b>Marine Fisheries</b>	Fish-- Hake	30254
<b>Marine Fisheries</b>	Fish-- Alaska Pollack	30255
<b>Marine Fisheries</b>	Fish-- Blue whittings	30256
<b>Marine Fisheries</b>	Fish-- Other	30259
<b>Marine Fisheries</b>	Fish-- Catfish	30272
<b>Marine Fisheries</b>	Fish-- Carp	30273
<b>Marine Fisheries</b>	Fish-- Eels	30274
<b>Marine Fisheries</b>	Fish-- Other	30279
<b>Marine Fisheries</b>	Fish-- Dogfish and other sharks	30281
<b>Marine Fisheries</b>	Fish-- Rays and skates	30282
<b>Marine Fisheries</b>	Fish-- Toothfish	30283
<b>Marine Fisheries</b>	Fish-- Seabass	30284
<b>Marine Fisheries</b>	Fish-- Seabream	30285
<b>Marine Fisheries</b>	Fish-- Other	30289
<b>Marine Fisheries</b>	Fish--Livers and roes	30290
<b>Marine Fisheries</b>	Fish-- Sockeye salmon	30311
<b>Marine Fisheries</b>	Fish-- Other Pacific salmon	30312
<b>Marine Fisheries</b>	Fish-- Atlantic salmon	30313
<b>Marine Fisheries</b>	Fish-- Trout	30314
<b>Marine Fisheries</b>	Fish-- Other	30319
<b>Marine Fisheries</b>	Fish-- Catfish	30324
<b>Marine Fisheries</b>	Fish-- Carp	30325
<b>Marine Fisheries</b>	Fish-- Eels	30326
<b>Marine Fisheries</b>	Fish-- Other	30329
<b>Marine Fisheries</b>	Fish-- Halibut	30331
<b>Marine Fisheries</b>	Fish-- Plaice	30332
<b>Marine Fisheries</b>	Fish-- Sole	30333
<b>Marine Fisheries</b>	Fish-- Turbots	30334
<b>Marine Fisheries</b>	Fish-- Other	30339
<b>Marine Fisheries</b>	Albacore	30341
<b>Marine Fisheries</b>	Yellowfin tunas	30342
<b>Marine Fisheries</b>	Fish-- Skipjack	30343
<b>Marine Fisheries</b>	Bigeye tunas	30344
<b>Marine Fisheries</b>	Atlantic and Pacific bluefin tunas	30345
<b>Marine Fisheries</b>	Southern bluefin tunas	30346
<b>Marine Fisheries</b>	Fish-- Other	30349
<b>Marine Fisheries</b>	Fish-- Herrings	30351
<b>Marine Fisheries</b>	Fish-- Sardines	30353
<b>Marine Fisheries</b>	Fish-- Mackerel	30354

<b>Marine Fisheries</b>	Fish-- Jack and horse mackerel	30355
<b>Marine Fisheries</b>	Fish-- Cobia	30356
<b>Marine Fisheries</b>	Fish-- Swordfish	30357
<b>Marine Fisheries</b>	Fish-- Cod	30363
<b>Marine Fisheries</b>	Fish-- Haddock	30364
<b>Marine Fisheries</b>	Fish-- Coalfish	30365
<b>Marine Fisheries</b>	Fish-- Hake	30366
<b>Marine Fisheries</b>	Fish-- Alaska Pollack	30367
<b>Marine Fisheries</b>	Fish-- Blue whittings	30368
<b>Marine Fisheries</b>	Fish-- Other	30369
<b>Marine Fisheries</b>	Fish-- Dogfish and other sharks	30381
<b>Marine Fisheries</b>	Fish-- Rays and skates	30382
<b>Marine Fisheries</b>	Fish-- Toothfish	30383
<b>Marine Fisheries</b>	Fish-- Seabass	30384
<b>Marine Fisheries</b>	Fish-- Other	30389
<b>Marine Fisheries</b>	Fish-Livers and roes	30390
<b>Marine Fisheries</b>	Fish fillets-- Catfish	30432
<b>Marine Fisheries</b>	Fish fillets-- Nile Perch	30433
<b>Marine Fisheries</b>	Fish fillets-- Other	30439
<b>Marine Fisheries</b>	Fish fillets-- Pacific salmon	30441
<b>Marine Fisheries</b>	Fish fillets-- Trout	30442
<b>Marine Fisheries</b>	Fish fillets-- Flat fish	30443
<b>Marine Fisheries</b>	Fish fillets-- Fish of the families Bregmacerotidae	30444
<b>Marine Fisheries</b>	Fish fillets-- Swordfish	30445
<b>Marine Fisheries</b>	Fish fillets-- Toothfish	30446
<b>Marine Fisheries</b>	Fish fillets-- Other	30449
<b>Marine Fisheries</b>	Fish fillets-- Tilapias	30451
<b>Marine Fisheries</b>	Fish fillets-- Salmonidae	30452
<b>Marine Fisheries</b>	Fish fillets-- Fish of the families Bregmacerotidae	30453
<b>Marine Fisheries</b>	Fish fillets-- Swordfish	30454
<b>Marine Fisheries</b>	Fish fillets-- Toothfish	30455
<b>Marine Fisheries</b>	Fish fillets-- Other	30459
<b>Marine Fisheries</b>	Fish fillets-- Tilapias	30461
<b>Marine Fisheries</b>	Fish fillets-- Catfish	30462
<b>Marine Fisheries</b>	Fish fillets-- Nile Perch	30463
<b>Marine Fisheries</b>	Fish fillets-- Other	30469
<b>Marine Fisheries</b>	Fish fillets-- Cod	30471
<b>Marine Fisheries</b>	Fish fillets-- Haddock	30472
<b>Marine Fisheries</b>	Fish fillets-- Coalfish	30473
<b>Marine Fisheries</b>	Fish fillets-- Hake	30474
<b>Marine Fisheries</b>	Fish fillets-- Alaska Pollack	30475
<b>Marine Fisheries</b>	Fish fillets-- Other	30479
<b>Marine Fisheries</b>	Fish fillets-- Pacific salmon	30481
<b>Marine Fisheries</b>	Fish fillets-- Trout	30482
<b>Marine Fisheries</b>	Fish fillets-- Flat fish	30483
<b>Marine Fisheries</b>	Fish fillets-- Swordfish	30484
<b>Marine Fisheries</b>	Fish fillets-- Toothfish	30485

<b>Marine Fisheries</b>	Fish fillets-- Herrings	30486
<b>Marine Fisheries</b>	Tunas	30487
<b>Marine Fisheries</b>	Fish fillets-- Other	30489
<b>Marine Fisheries</b>	Fish fillets-- Swordfish	30491
<b>Marine Fisheries</b>	Fish fillets-- Toothfish	30492
<b>Marine Fisheries</b>	Fish fillets-- Alaska Pollack	30494
<b>Marine Fisheries</b>	Fish fillets-- Fish of the families Bregmacerotidae	30495
<b>Marine Fisheries</b>	Fish fillets-- Other	30499
<b>Marine Fisheries</b>	Fish-Flours	30510
<b>Marine Fisheries</b>	Fish-Livers and roes of fish	30520
<b>Marine Fisheries</b>	Fish-- Tilapias	30531
<b>Marine Fisheries</b>	Fish-- Fish of the families Bregmacerotidae	30532
<b>Marine Fisheries</b>	Fish-- Other	30539
<b>Marine Fisheries</b>	Fish-- Pacific salmon	30541
<b>Marine Fisheries</b>	Fish-- Herrings	30542
<b>Marine Fisheries</b>	Fish-- Trout	30543
<b>Marine Fisheries</b>	Fish-- Other	30549
<b>Marine Fisheries</b>	Fish-- Cod	30551
<b>Marine Fisheries</b>	Fish-- Other	30559
<b>Marine Fisheries</b>	Fish-- Herrings	30561
<b>Marine Fisheries</b>	Fish-- Cod	30562
<b>Marine Fisheries</b>	Fish-- Anchovies	30563
<b>Marine Fisheries</b>	Fish-- Tilapias	30564
<b>Marine Fisheries</b>	Fish-- Other	30569
<b>Marine Fisheries</b>	Fish-- Shark fins	30571
<b>Marine Fisheries</b>	Fish-- Fish heads	30572
<b>Marine Fisheries</b>	Fish-- Other	30579
<b>Marine Fisheries</b>	Crustaceans-- Rock lobster and other sea crawfish	30611
<b>Marine Fisheries</b>	Crustaceans-- Lobsters	30612
<b>Marine Fisheries</b>	Crustaceans-- Crabs	30614
<b>Marine Fisheries</b>	Crustaceans-- Norway lobsters	30615
<b>Marine Fisheries</b>	Crustaceans-- Other	30619
<b>Marine Fisheries</b>	Crustaceans-- Rock lobster and other sea crawfish	30621
<b>Marine Fisheries</b>	Crustaceans-- Lobsters	30622
<b>Marine Fisheries</b>	Crustaceans-- Crabs	30624
<b>Marine Fisheries</b>	Crustaceans-- Norway lobsters	30625
<b>Marine Fisheries</b>	Crustaceans-- Other	30629
<b>Marine Fisheries</b>	Molluscs-- Live	30711
<b>Marine Fisheries</b>	Molluscs-- Other	30719
<b>Marine Fisheries</b>	Molluscs-- Live	30721
<b>Marine Fisheries</b>	Molluscs-- Other	30729
<b>Marine Fisheries</b>	Molluscs-- Live	30731
<b>Marine Fisheries</b>	Molluscs-- Other	30739
<b>Marine Fisheries</b>	Molluscs-- Live	30741
<b>Marine Fisheries</b>	Molluscs-- Other	30749
<b>Marine Fisheries</b>	Molluscs-- Live	30751
<b>Marine Fisheries</b>	Molluscs-- Other	30759

<b>Marine Fisheries</b>	Molluscs-Snails	30760
<b>Marine Fisheries</b>	Molluscs-- Live	30771
<b>Marine Fisheries</b>	Molluscs-- Other	30779
<b>Marine Fisheries</b>	Molluscs-- Live	30781
<b>Marine Fisheries</b>	Molluscs-- Other	30789
<b>Marine Fisheries</b>	Molluscs-- Live	30791
<b>Marine Fisheries</b>	Molluscs-- Other	30799
<b>Marine Fisheries</b>	Aquatic invertebrates other than crustaceans-- Live	30811
<b>Marine Fisheries</b>	Aquatic invertebrates other than crustaceans-- Other	30819
<b>Marine Fisheries</b>	Aquatic invertebrates other than crustaceans-- Live	30821
<b>Marine Fisheries</b>	Aquatic invertebrates other than crustaceans-- Other	30829
<b>Marine Fisheries</b>	Aquatic invertebrates other than crustaceans-Jellyfish	30830
<b>Marine Fisheries</b>	Aquatic invertebrates other than crustaceans-Other	30890

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