Facts Sheets – OETS -Belize

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OETS Sectors Selection Workshop
Belize City, Belize, 28-29 November 2018

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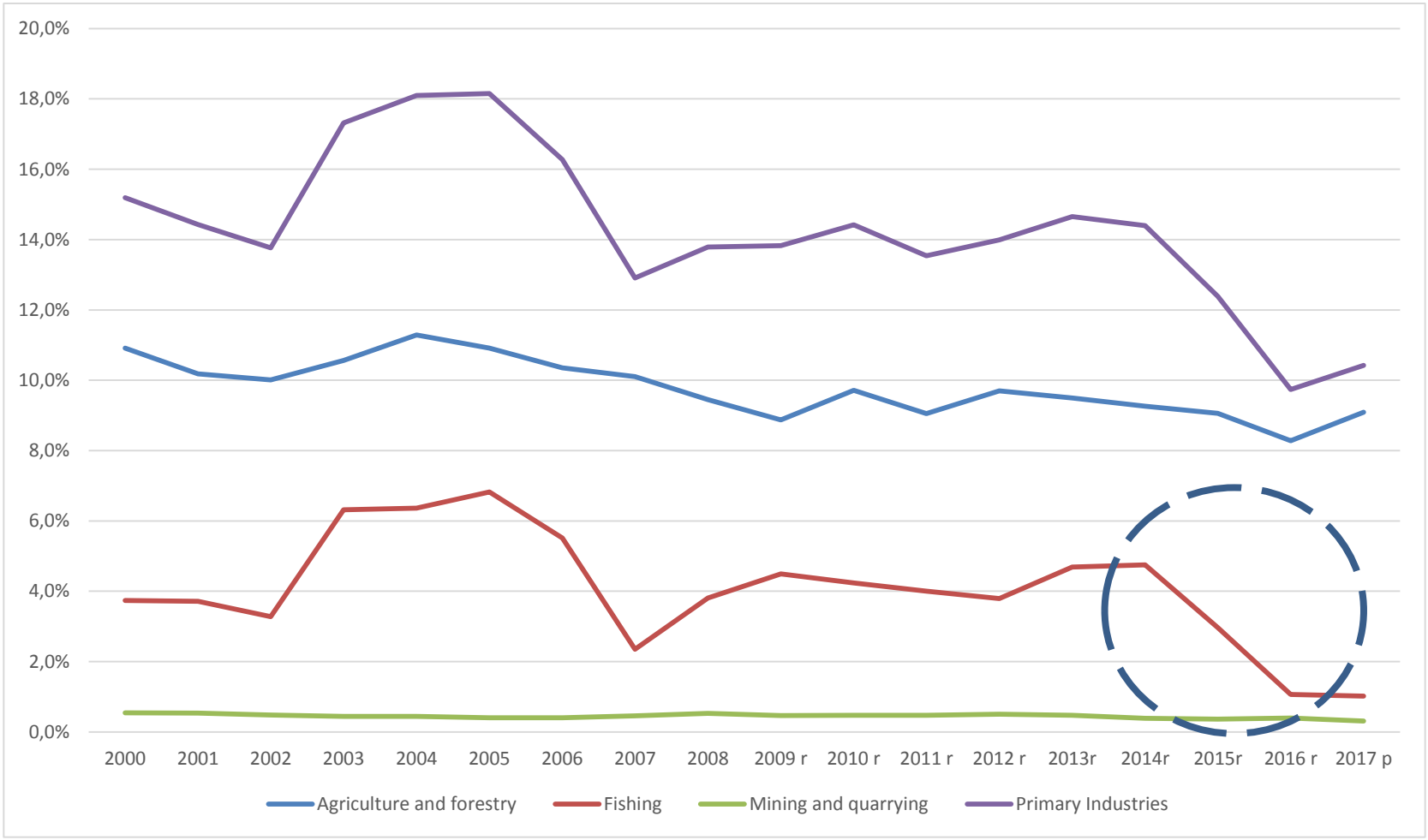
Introduction

- Data reported in the fact sheets are from internationally publicly available sources:
  - FAO FishSTAT: capture production and aquaculture production
  - UN-COMTRADE: trade data (exports and imports)
  - UNCTAD-TRAINS: Tariffs and Non-Tariff Measures
  - Statistical Institute of Belize: employment
  - Licenses Fees: Belize Fisheries Department, High Seas Commission
- More detail information may exists but not accessible:
  - e.g. employment and wages from Belize Labour Surveys

- Very little on production of manufactured seafood products:
  - UNIDO
  - National Firms Surveys (?)
- Nothing on market access conditions in Belize: tariffs applied and NTMs imposed on domestic and foreign products → OETS
- Analysis remains essentially economic
- No biological perspective
  - Status of stocks
  - Sustainability considerations

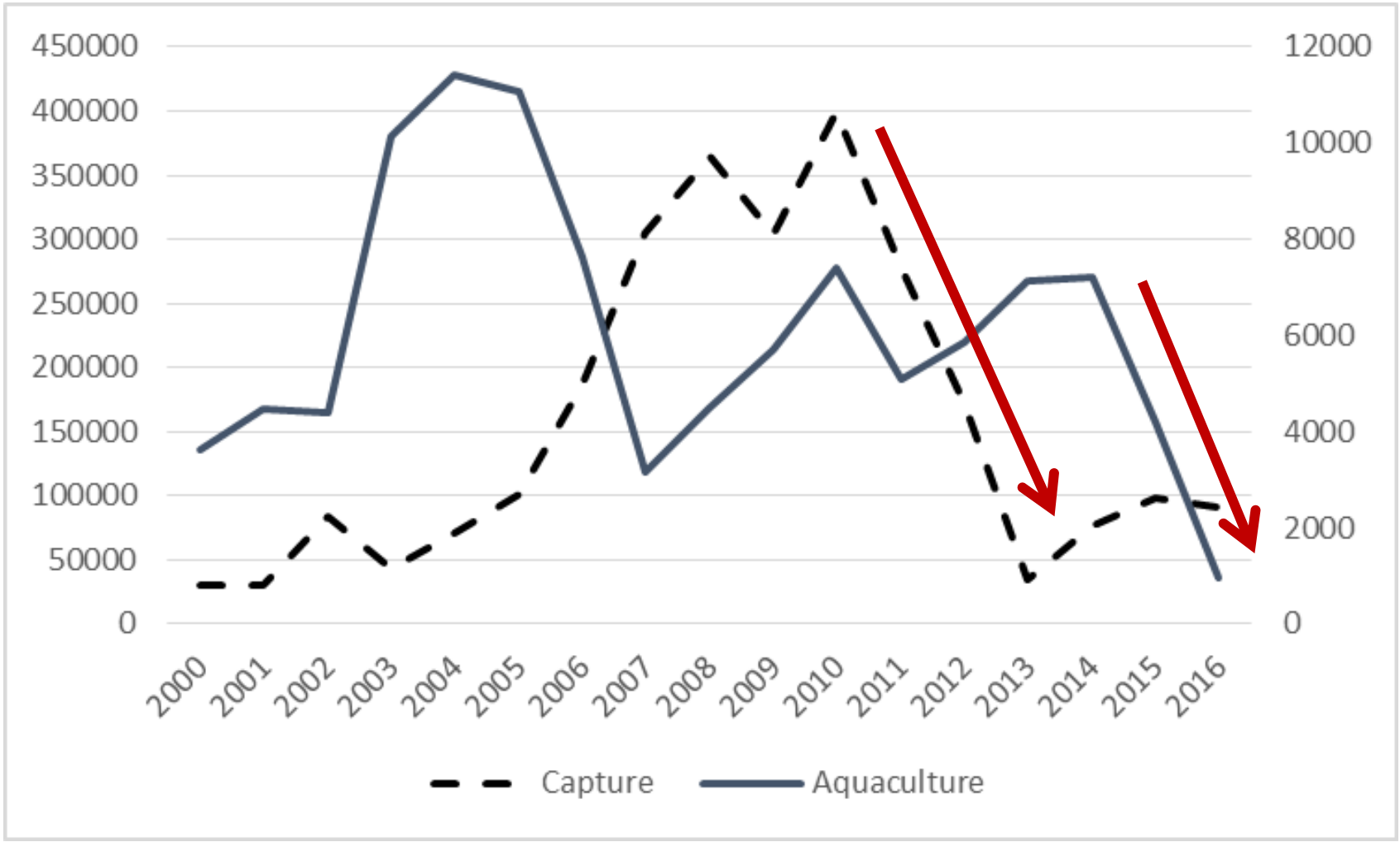
SHARE IN GDP AT CONSTANT PRICES: PRIMARY INDUSTRIES (2000-2017)



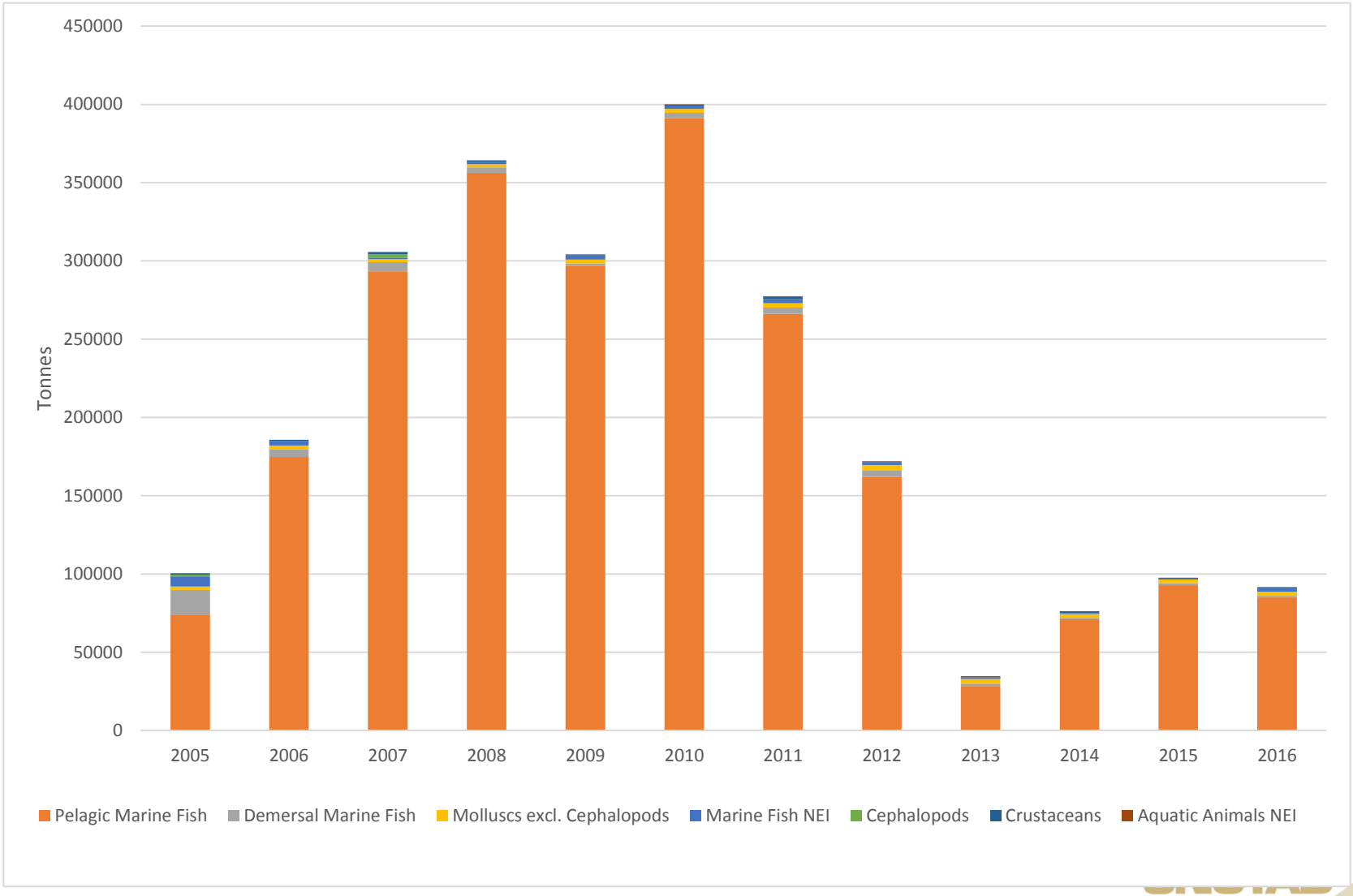
- The Agriculture and forestry sector remains the largest sector with a share in GDP varying between 8 and about 12 percent during the 2000-2017 period
- The tendency for the sector however is a declining or one
- The fishing sector is the second largest contributors to GDP amongst primary industries
  - 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

Capture/Production

Capture and aquaculture production (tonnes)



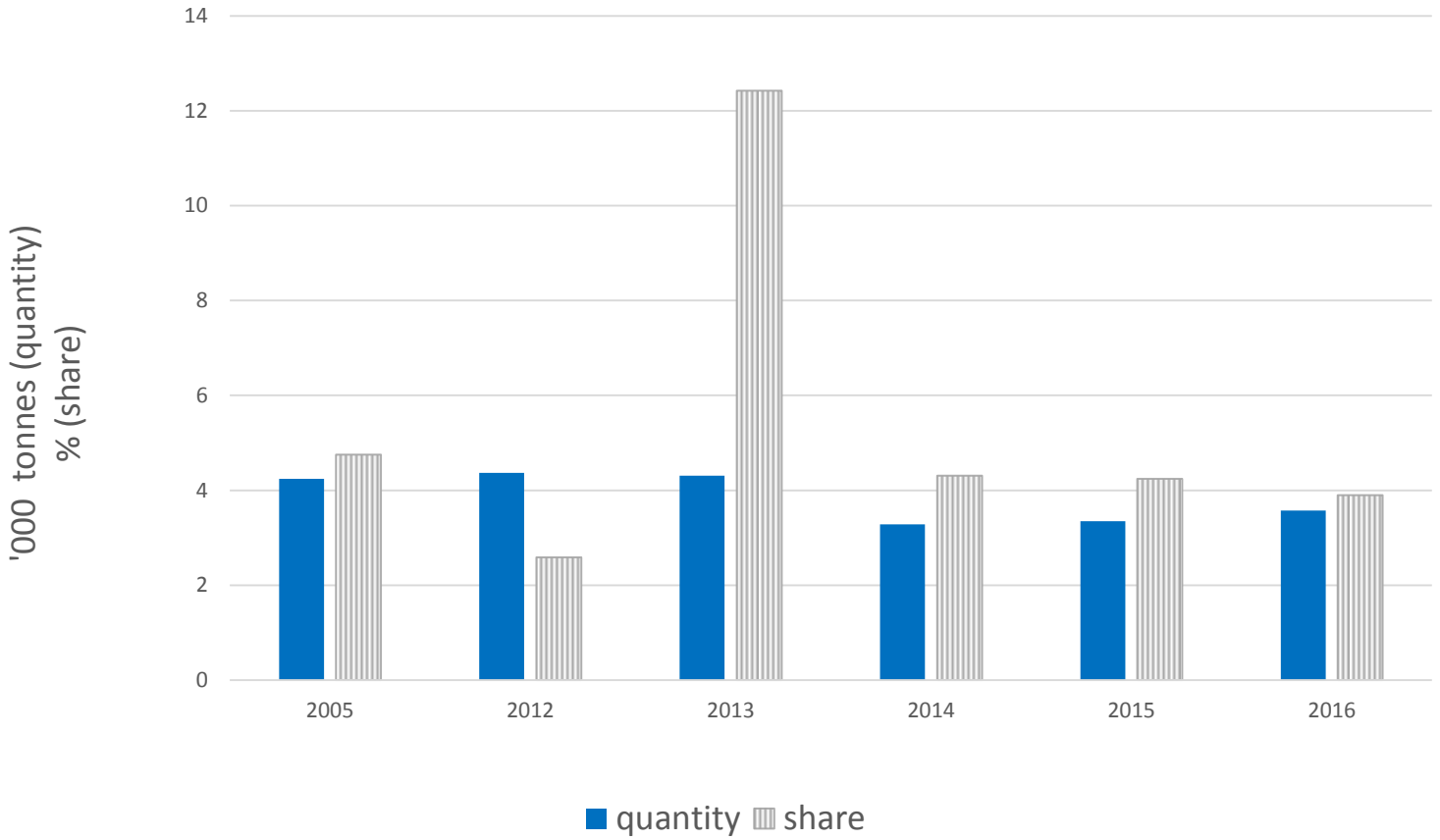
Capture Production



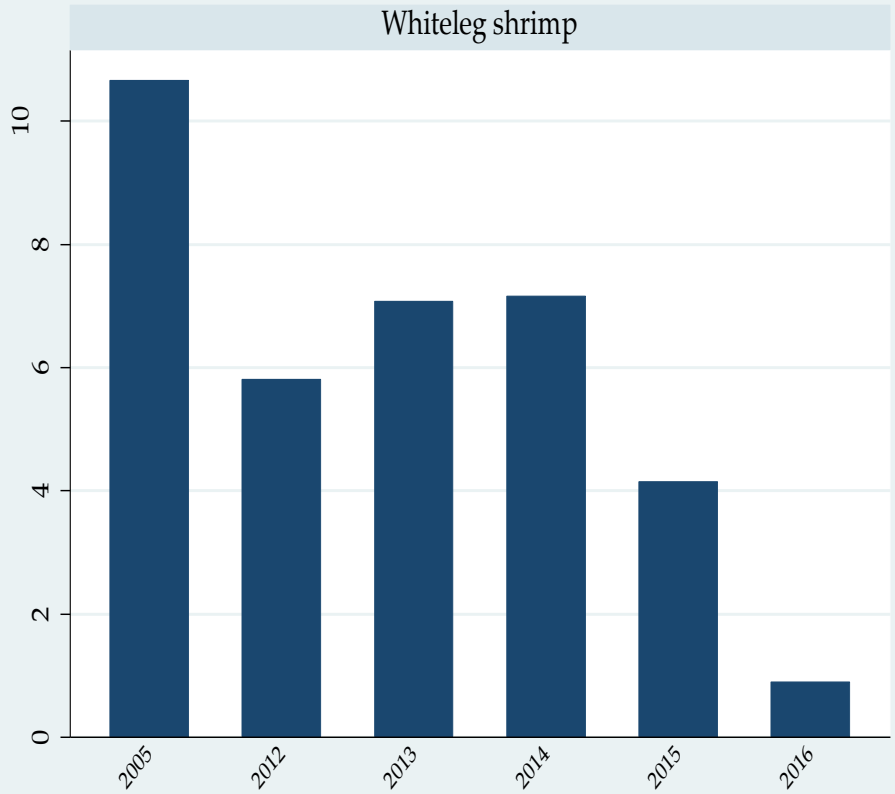
- Belize is an “open registry” State, with a number of non-locally owned fishing vessels flying its flag
- Currently, Belize reported 60 vessels being authorized to operate in the high seas under the 1995 FAO Compliance Agreement
- Tuna catches from these vessels have been around an average of 4 000 tonnes per year since 2005 but increased up to 24 000 tonnes in 2012 and then decreased to about 17 000 tonnes in 2016

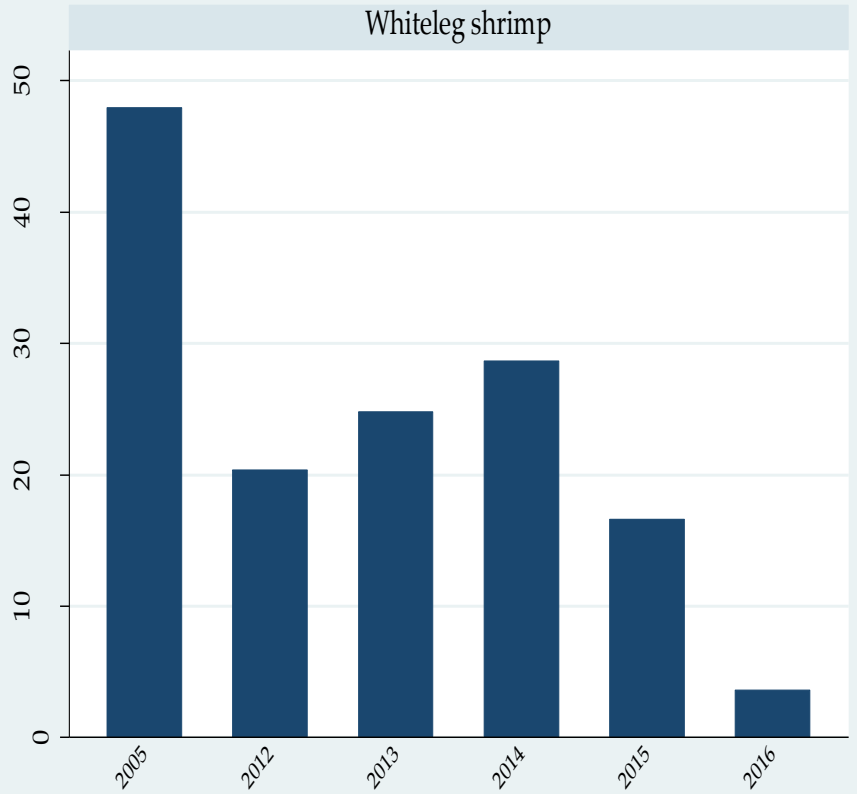
- Catches of other species, mainly small pelagic species (e.g. sardines, mackerels, anchovies) from Eastern Central Atlantic,
  - peaked in 2010 at around 400 000 tonnes
  - but decreased dramatically until 2013
  - in 2016 production was about 85 000 tonnes
- Capture of costal fishes also declined sharply 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

LANDINGS 2005-2016 (QUANTITY AND SHARE IN TOTAL CAPTURE PRODUCTION)

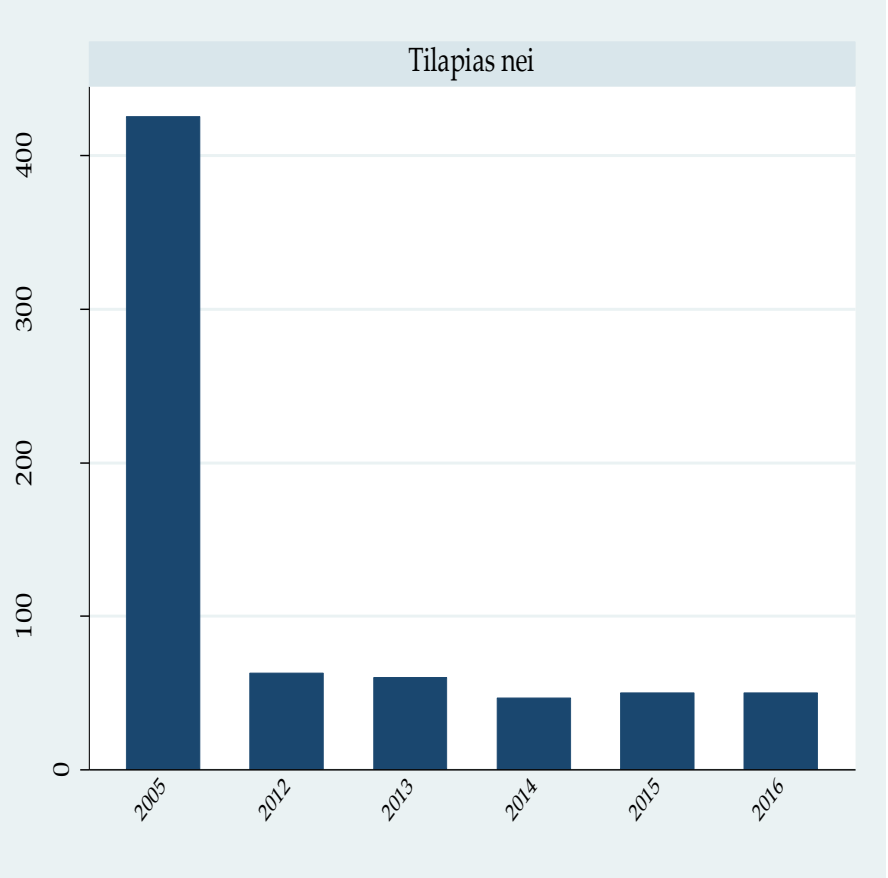


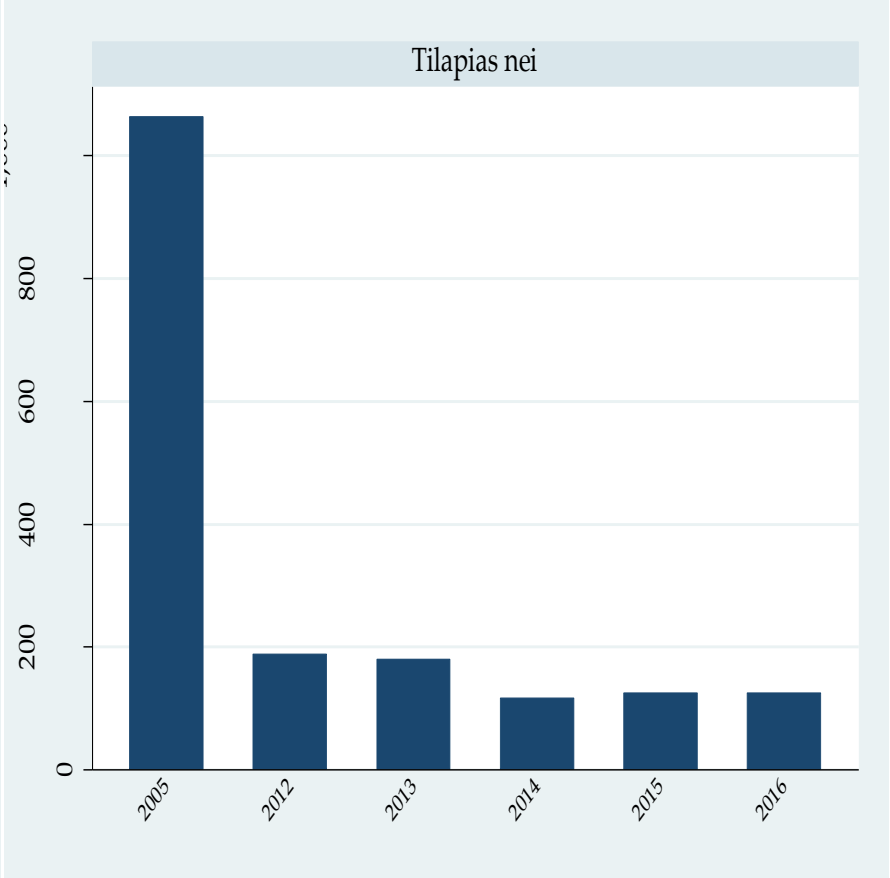
White Shrimp Aquaculture Production 2005, 2012-2016



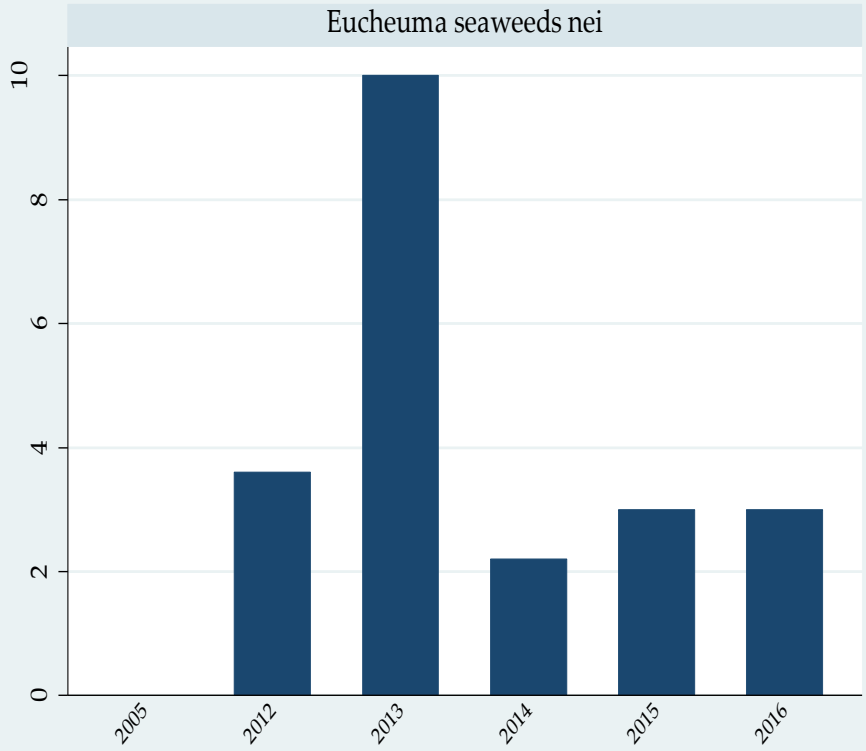


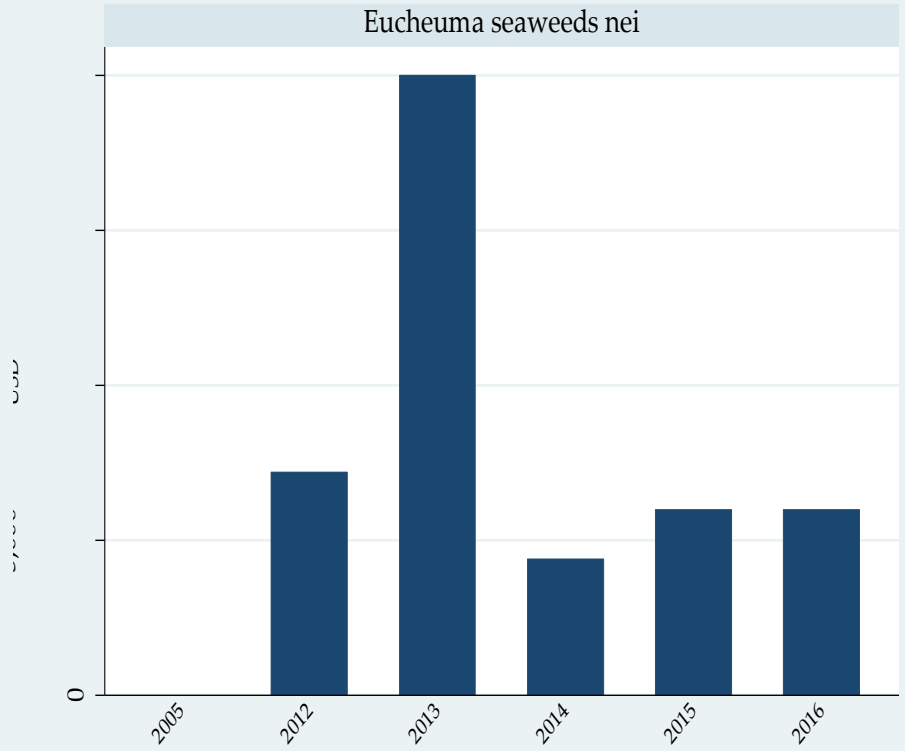
TILAPIAS AQUACULTURE PRODUCTION 2005, 2012-2016





RED SEAWEEDS AQUACULTURE PRODUCTION 2005, 2012-2016





Employment

EMPLOYMENT IN THE CAPTURE PRODUCTION FISH SECTOR (000)

	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 Capture	10,3%	9,4%	11,8%		12,5%	11,4%	10,6%			

Source: FAO statistics and ILOSTAT

Number of persons employed in capture production	Source	**Number of persons employed in aquaculture production**	Source	**Number of persons employed in other fisheries dependent activities**	Source	**Total**
2 500	*CRFM, 2015 (2013 estimate)*	**1 115**	*SIB, 2014 (2013 estimate)*	**1 000**	*Gongora, 2012 (2011 estimate)*	**4 615**

SOURCE: CARIBBEAN REGIONAL FISHERIES MECHANISM (CRFM) STATISTICS AND INFORMATION REPORT – 2014

EMPLOYMENT IN AQUACULTURE REPORTED IN APRIL 18

	Sex			District					
	Male	Female	Total	Corozal	Orange Walk	Belize	Cayo	Stann Creek	Toledo
	Count	Count	Count	Count	Count	Count	Count	Count	Count
Aquaculture	1543	38	1581	108	25	1058	0	178	212
Share in Total	96442	59508	155950	20545	19677	50816	35638	16298	12976

SOURCE: SIB LABOUR BULLETIN

Trade

- Data are based on the Harmonized System Classification in its 2012 version (World Customs Organization)
  - available for Belize for the years 2014 to 2018
  - About 180 fish and fisheries products
    - Main groups: live, fresh or chilled, frozen, fillets, dried salted or in brine, crustaceans, molluscs, other aquatic invertebrates
  - No specific reference to aquaculture products (10 products identified for Belize)
  - 30 processed seafood products
  - Mirrored declarations: exports versus imports (identification of orphan observations)

CAPTURE

	2014	2015	2016	2017
Exports value (US$ millions)	12.9	13.6	14	14.6
Exports Qty (tonnes)	1875.4	1610.4	1880.2	1691.2
Number of Destinations	18	15	15	12
Number of Products	21	15	14	14
Total Exports (US$ millions)	307	268	201	223
Share in Total	4.2%	5.1%	7.0%	6.5%

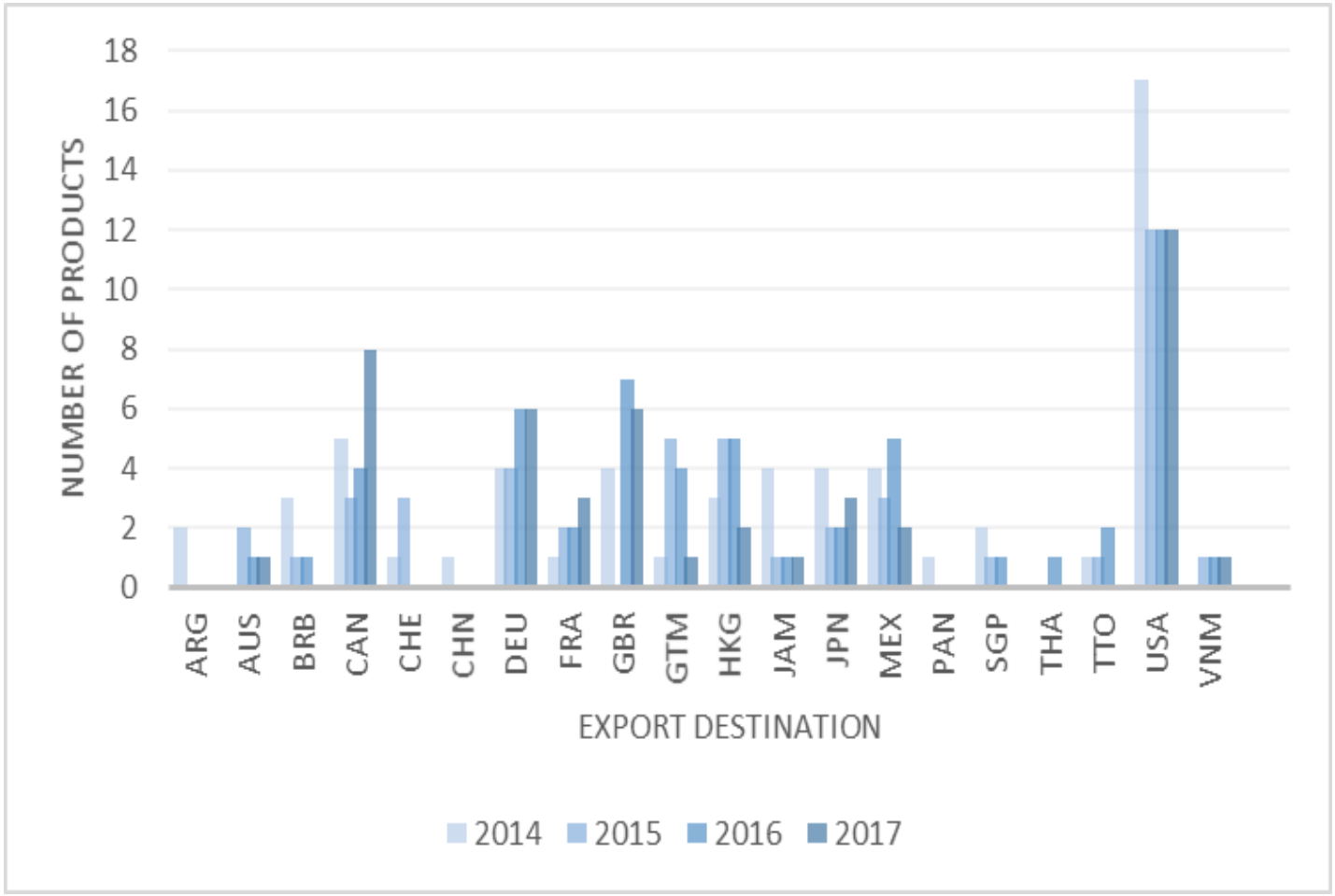
AQUA

Exports value (USD millions)	**44.1**	**30.2**	**6.4**	**4.6**
Exports Qty (tonnes)	14350.8	10188.3	1624.1	1286.8
Number of Destinations	10	8	6	7
Number of Products	3	6	4	3
Share in Total	14.4%	11.3%	3.2%	2.1%

SEAFOOD

Exports value (USD)	-	59,327	159,253	0
Exports Qty (tonnes)	0.256	10.15	31.48	0
Number of Destinations	1	2	1	0
Number of Products	3	1	1	0
Total Exports (US$ millions)	307	268	201	0
Share in total exports	-	0.22%	0.79%	0%

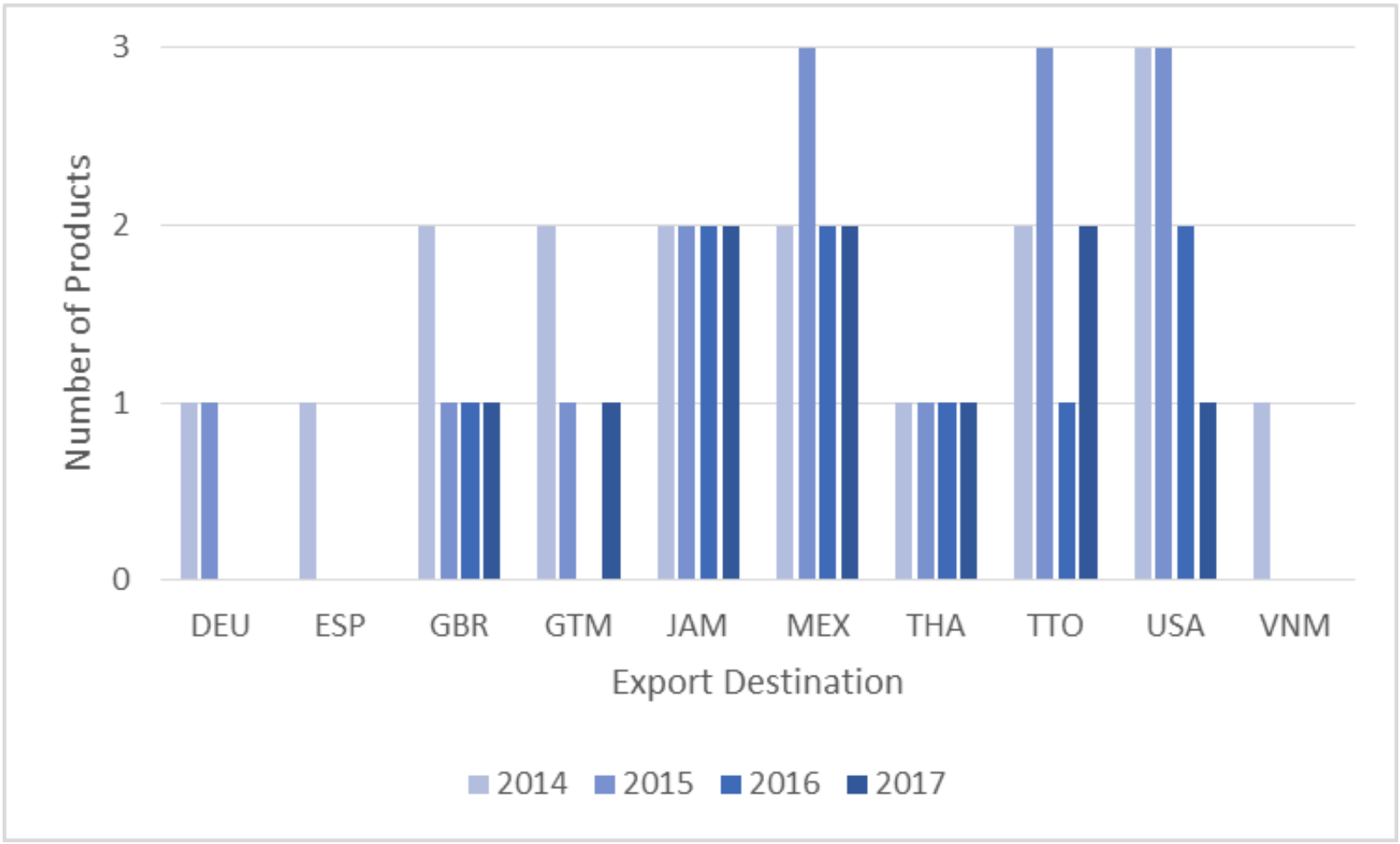
Number of Capture products per destination



- Export composition reflects (landed) capture production composition:
  - Frozen lobsters are the main exported product in both 2014 and 2017 followed by Queen conches
  - Lobsters share increased from about 60 percent in 2014 to about 72 percent in 2017
  - As to Queen conches their share fell from 33 percent in 2014 to about 26 percent in 2017.
  - Lobster and conch exports are not huge in volume but very significant in value

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

NUMBER OF AQUACULTURE PRODUCTS PER DESTINATION



- Drastic re-composition of Belize export destinations basket
  - Major destinations in 2017 in value terms are the Great Britain, Thailand and the USA representing more than 30 percent of all aquaculture exports
  - In 2014 Mexico had the largest share with about 60 percent
  - In quantity terms, Thailand is the largest export market in 2017 with a share equal to 23 percent (Mexico occupied that position in 2014 with again about 60 percent of Belize export quantity)
  - Jamaica appears as the third important destination in terms of quantity with more than 20 percent but counting for less than 7 percent in terms of value

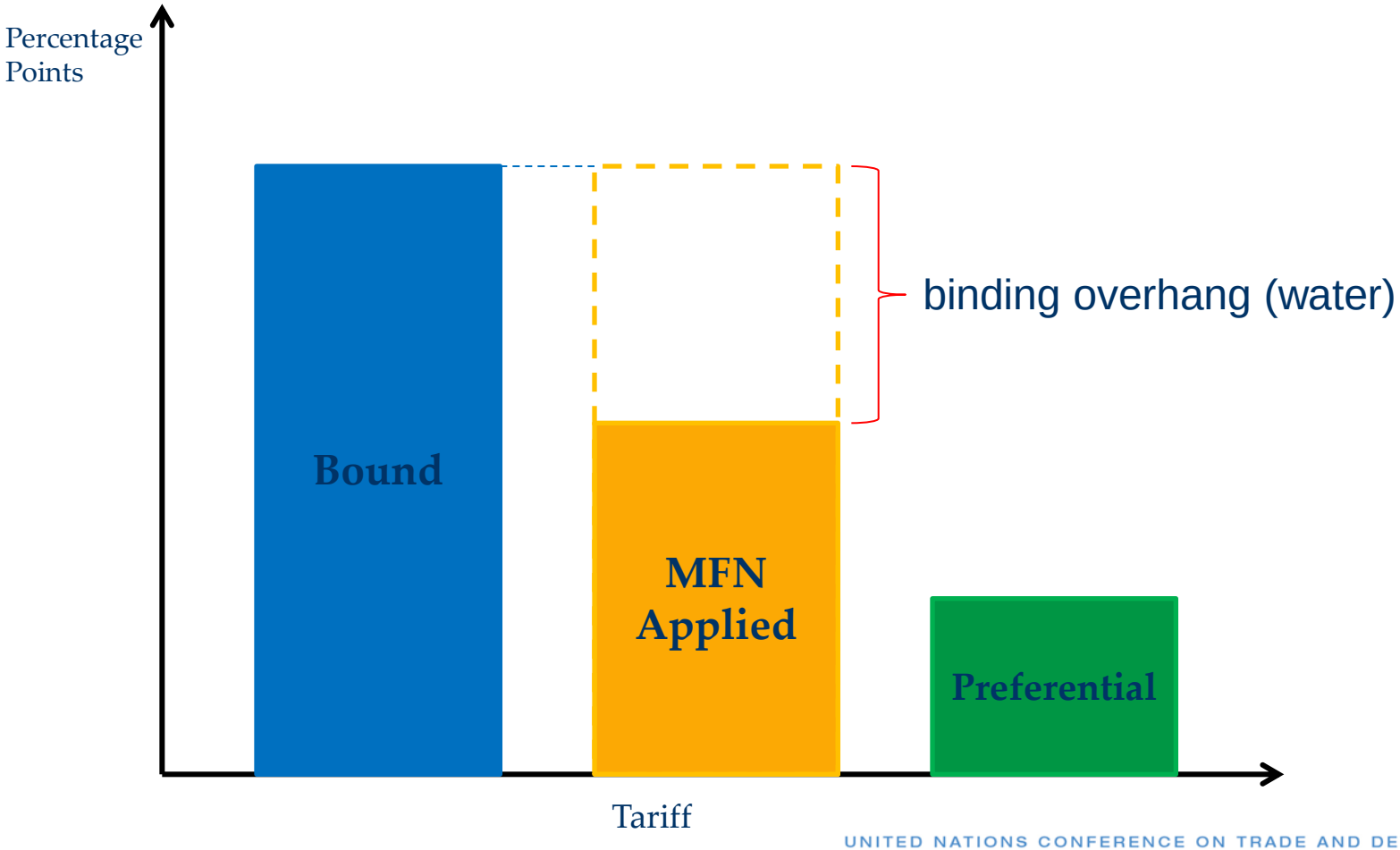
- The predominance of shrimp products is obvious
- However, Tilapia was exported as fresh or chilled since 2015
- Tilapias fillets have been exported in 2015 and 2016 but not in 2017
- White shrimps were exported only as frozen after 2015

productcode	Description	year	exports (USD)	net weight (kgm)
160411	Prepared or preserved Salmon	2014	0	160
160559	Prepared or preserved Crustaceans	2014	0	66
160561	**Prepared or preserved Sea Cucumbers**	**2015**	**59,327**	**10,158**
160561	**Prepared or preserved Sea Cucumbers**	**2016**	**159,263**	**31,487**
250100	(Marine) Salt	2014	0	30

- Exports of seafood manufactured products have been limited to one product namely sea cucumber preparations
- Exports dropped to zero with the suspension of the extraction for all species of sea cucumbers early 2017

Market Access

Comparing types of tariffs



In most circumstances apply to both foreign and domestic products

UNCTAD NTMs Classification (2012)

Imports		
Technical Measures	A	SANITARY AND PHYTOSANITARY MEASURES
	B	TECHNICAL BARRIERS TO TRADE
	C	PRE-SHIPMENT INSPECTION AND OTHER FORMALITIES
Non-Technical Measures	D	CONTINGENT TRADE-PROTECTIVE MEASURES
	E	NON-AUTOMATIC LICENSING, QUOTAS, PROHIBITIONS AND QUANTITY-CONTROL MEASURES OTHER THAN FOR SPS OR TBT REASONS
	F	PRICE-CONTROL MEASURES, INCLUDING ADDITIONAL TAXES AND CHARGES
	G	FINANCE MEASURES
	H	MEASURES AFFECTING COMPETITION
	I	TRADE-RELATED INVESTMENT MEASURES
	J	DISTRIBUTION RESTRICTIONS
	K	RESTRICTIONS ON POST-SALES SERVICES
	L	SUBSIDIES (EXCLUDING EXPORT SUBSIDIES UNDER P7)
	M	GOVERNMENT PROCUREMENT RESTRICTIONS
	N	INTELLECTUAL PROPERTY
	O	RULES OF ORIGIN
Exports		
	P	EXPORT-RELATED MEASURES

NB: Procedural obstacles are not NTMs per se but affect compliance with these measures

http://unctad.org/en/PublicationsLibrary/ditctab20122_en.pdf

Reporter-product pairs (with positive imports) affected by different types of NTMs

fish products

Number of NTMs types	Share in Total	Share in Affected
0	2.76	
1	5.81	5.97
2	32.54	33.46
3	24.56	25.26
4	25.98	26.72
5	5.98	6.15
6	2.38	2.44

non-fish products

Number of NTMs types	Share in Total	Share in Affected
0	25.50	
1	21.54	28.91
2	22.63	30.37
3	15.97	21.44
4	10.59	14.22
5	3.17	4.26
6	0.60	0.8

- Measures that affect more than 50% of all import relationships in the fish sector:

  - A140: special authorization requirement for SPS reasons
  - A820: testing requirement
  - A830: certification requirement
  - A840: inspection requirement
  - A310: labelling requirements
  - B310 : labelling requirements

Pre-requisites to be followed in major markets

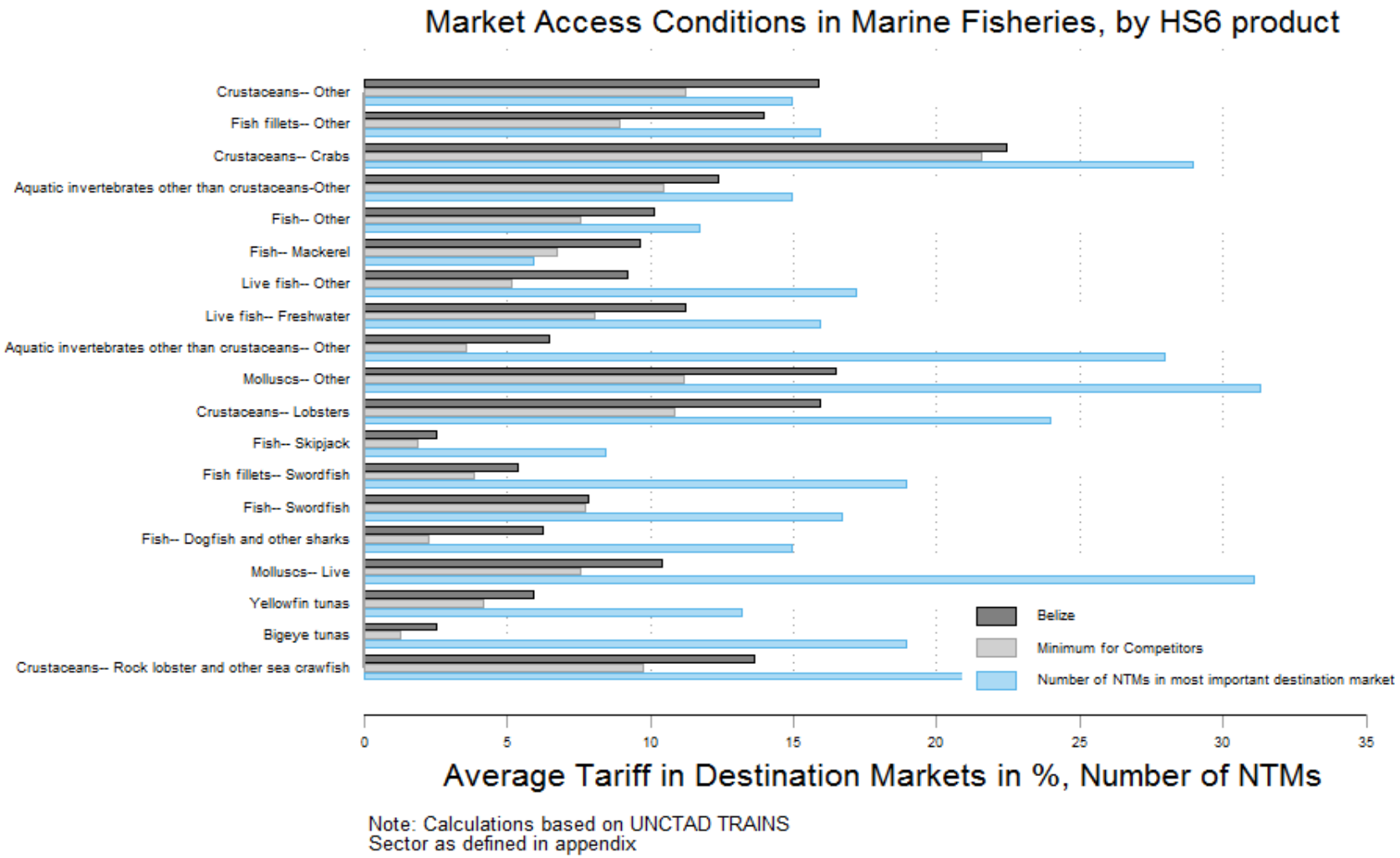
Requirements	EU	USA	Japan
Codex	To comply with	To comply with	To comply with
HACCP *	Required	Required	Required
Veterinary Documents (i) Health Certificate (ii) Official Marks identifying the country	Required at BOP	Required	Required
Eco-labelling	Mandatory	Voluntary	Voluntary
Catch certificate	Required	Required	Voluntary
On the Border Inspection/or Border Inspection system	Required	Required	Required
Company Certification Number	Required	Required	Required
Certification requirement from exporting countries	Mandatory	Required, but not mandatory as EU	Required, but not mandatory as EU
RASFF[5]	Mandatory	Not a member	Not a member

*** Hazard Analysis Critical Control Point**

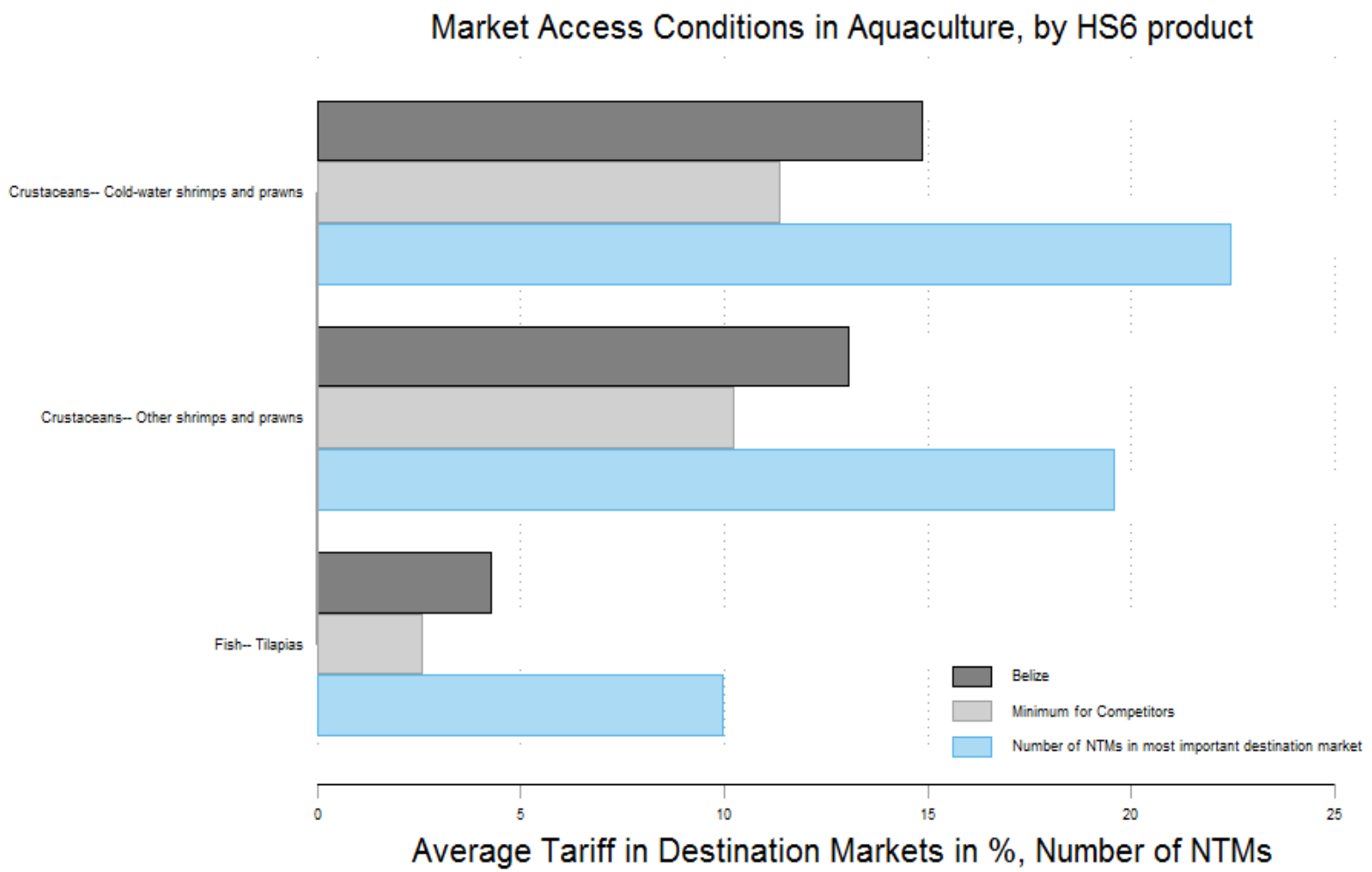
[5] Rapid Alert System for Food and Feed

- Voluntary Standards (Private NTMs):
  - Adopted by firms, national and international organizations
  - Most voluntary standards have been created in industrialized countries and are designed to address consumer concerns about the environmental and social impact of goods and services

- A remarkable achievement of the sector has been the certification, based on socially responsible and environmentally sustainable farming practices, by the Aquaculture Stewardship Council (ASC) of the members of Belize's Shrimp Growers Association production, which represents about 90% of the country's shrimp production
- Belize has become the first country in the world to be awarded a certification of this type for such a large portion of its national production



Note: Calculations based on UNCTAD TRAINS
Sector as defined in appendix



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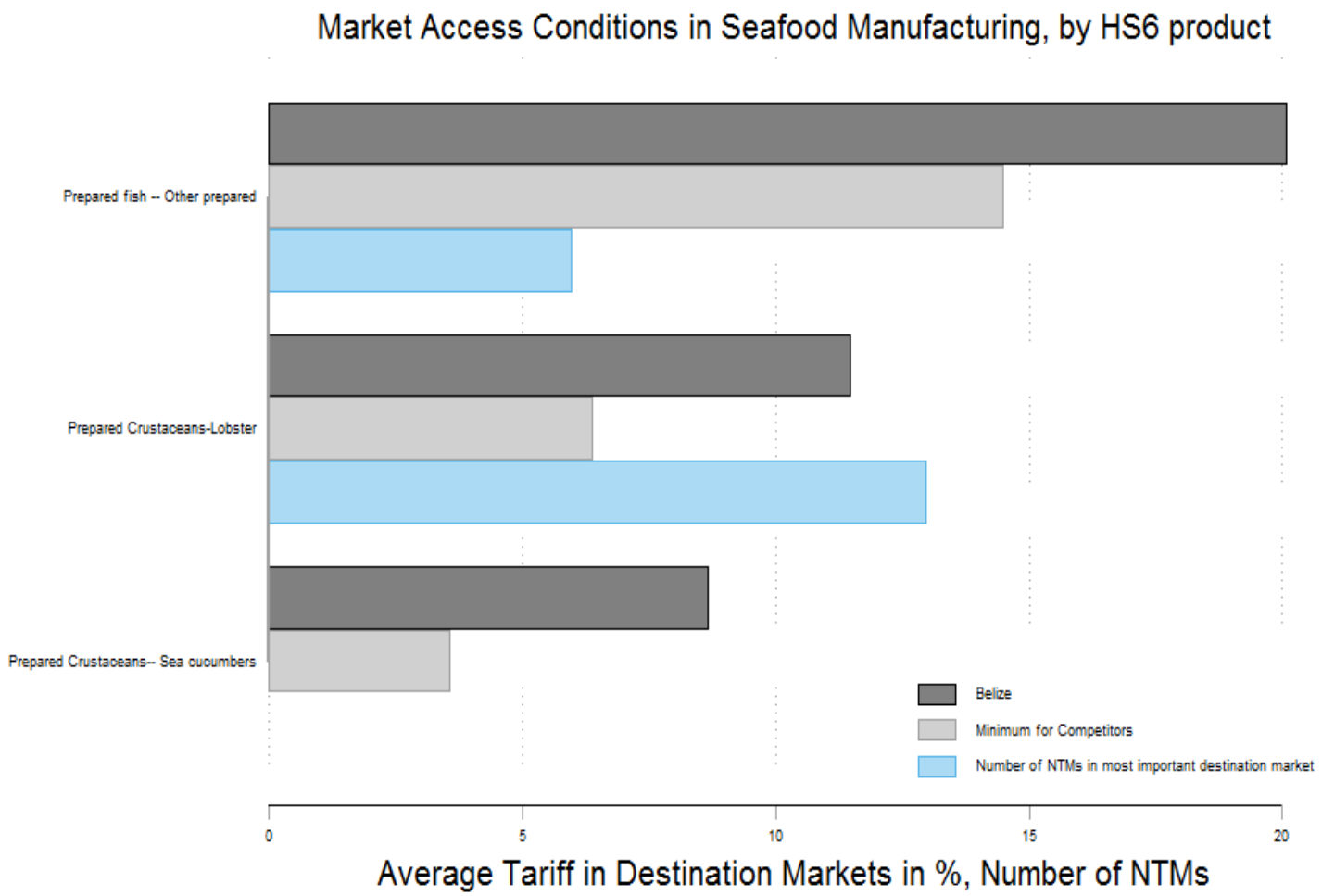

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Sector as defined in appendix

Discussion

- Sustained recovery of the aquaculture sector is desirable
  - Efficient treatment of the EMS disease
  - Diversification: e.g. sea cucumber, seaweeds
  - As argued by Beltraide, some additional species could be farmed in Belize:
    - native stocks such as the "River Lobster" (*Macrobrachium spp*.), Blue-eye Catfish (*Ictalurus furcatus*), Common Snook (*Centropomus undecimalis*), Mutton Snapper (*Lutjanus analis*), Nassau Grouper (*Epinephelus striatus*), Blue Crab (*Callinectes sapidus*),
    - or some exotic species such as the Australian Freshwater Lobster (*Cherax quadricarinatus*), channel Catfish (*Ictalurus punctatus*), Flounder (*Paralichthyidae spp*.), American Oyster (Crassostrea virginica), Malaysian Prawn (*Macrobrachium rosembergii*), Florida Pompano (*Trachinotus carolinus*).

  - A closer look at their respective demand on international markets could be relevant in a more detailed analysis + environmental sustainability
- Increase value addition: e.g. sea cucumber processed products (re-activation of previously existing trade relationships)

- Detailed analysis of export opportunities for coastal species beyond lobsters and conches
  - Diversification also through semi-processing: e.g. fillets

  → Identify possible supply capacity constraints
- Detailed analysis of market access conditions (foreign and domestic)
  - Preferential margins (either positive or negative)
  - NTMs and related procedures

- How informative could mirror trade data be?
  - Based on importing countries declarations Belize exports would amount to more than 34 millions of USD more than twice the value of the declared exports
  - The reason for such difference is likely to be linked to landings in third countries by foreign vessels with Belize flag
  - For instance, imports of frozen tuna form Belize vessels appear to be worth about 17 millions USD and amount to circa 6500 tonnes
  - Differences found in seafood products may be due essentially to misreporting
- Detailed sectoral analysis based on firms and household surveys could be extremely useful: precise information about employment and earnings or about prices or about supply constraints or obstacles to export markets

BELIZE EXPORTED SEAFOOD PRODUCTS AS DECLARED BY IMPORTING COUNTRIES

		2014	2015	2016	2017
Fats and oils	150420	0	1	0	0
Sardines	160413	0	1	0	0
Tuna	160414	0	1	0	1
Mackerel	160415	0	1	0	0
Other prepared	160420	0	0	1	0
Crab	160510	0	1	0	0
Shrimps and prawns	160521	1	1	1	1
Other shrimps and prawn	160529	0	1	1	0
Lobster	160530	0	0	1	0
Sea Cucumbers	160561	0	1	1	0
Animal fodder	230120	1	0	0	0
(Sea water) salt	250100	1	1	1	0
Total		3	9	6	2