

# **Case Study: Belize Fisheries and Tourism Markets-exploring linkages to enhance development, competitiveness and greater local participation**



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# Benefits of Tourism



- ❖ **Foreign Exchange**
- ❖ **Government Revenue**
- ❖ **Investment**
- ❖ **Job Creation**
- ❖ **Socio-Cultural & Economic Development**

# Employment and Earnings in Tourism



**Estimates are that more than 40,000 thousand persons are directly or indirectly supported by the tourism industry.**

**Since 2006, at least one million tourist arrivals were reported arriving annually to Belize**

**Conservatively, estimates are that Belize annual income from tourism is in excess of 250 million Belize Dollars**

# Benefits of Fisheries



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- ❖ **Job Creation**
- ❖ **Socio-Cultural & Economic Development**

# Employment and Earnings from the Fisheries Sector



**Estimates are that the capture fishery sector provides employment to about 2,500 fishers and 137 processing plants workers.**

**Export earning between 2003 and 2014 ranged from \$17.4million and \$24.8 million Belize dollars.**

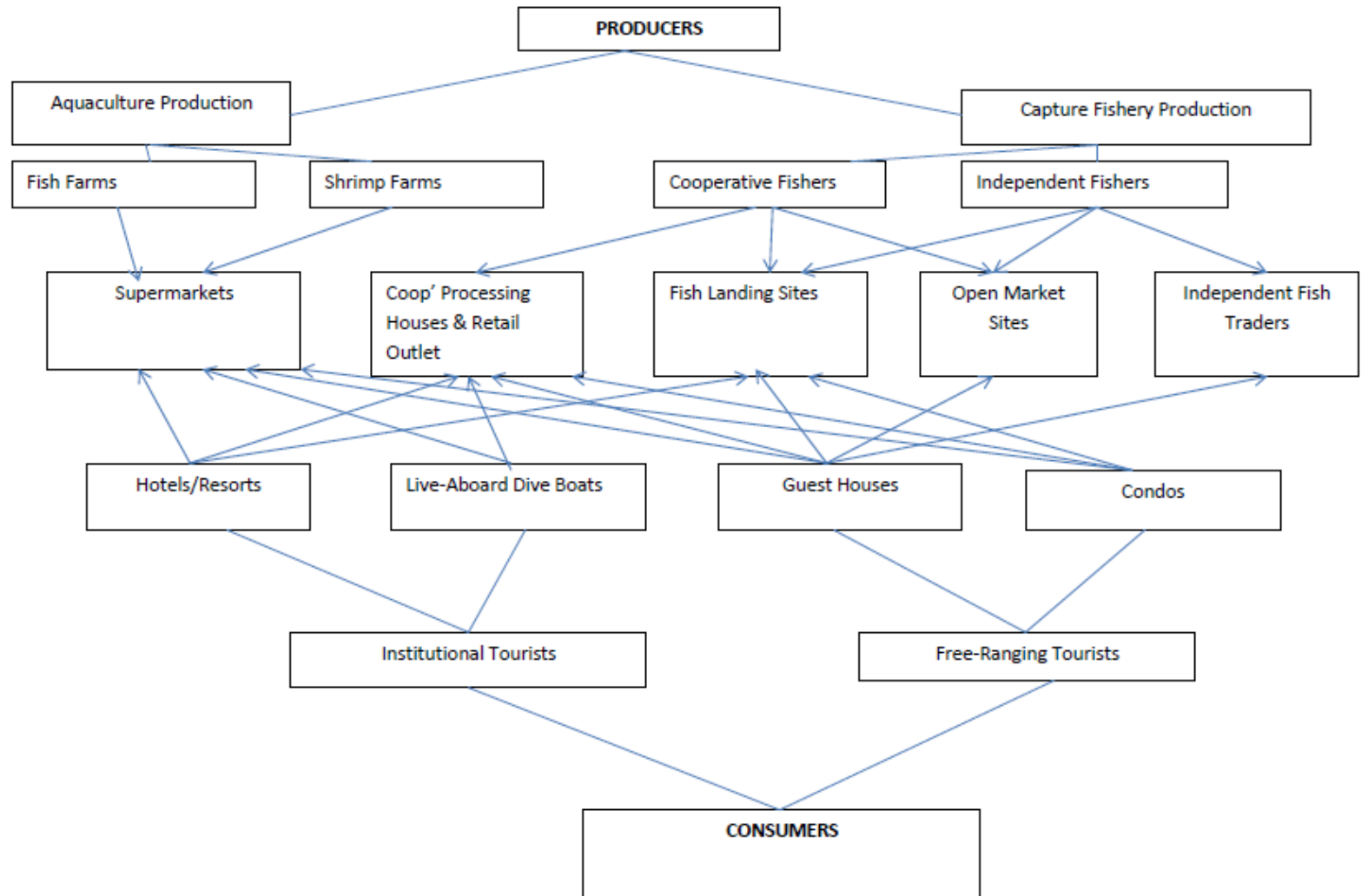
**Revenue from the aquaculture sub-sector in 2014 was \$86.2 million Belize dollars.**

# Supply & demand Scenario



- Most product harvested by the capture fishery industry or produced by shrimp & fish farms are marketed overseas.
- Estimates are that 20 % of total fishery product production support domestic consumption, by locals and tourist visitors.
- Some products are imported to supply tourist demand.
- Fishery products supplied to the tourist through the various vendors as shown in the following figure.

# Fishery Product Consumption by Tourists



# Feasibility assessment of potential project ideas - Capture Fishery food consumption



Project Ideas	Feasibility Criteria					Cumulative Score
	Cost	Time-frame	Complxty	Stkhldr Support	Policy Priority	
(i) Assess and monitor volume, value and range of seafood consumed by tourists	2	2	1	3	3	11
(ii) Assessment of volume and value of imported vs. domestically produced fishery products	2	2	2	2	2	10
(iii) Quality assessments of seafood at establishments catering to tourism sector	1	1	1	3	3	9
(iv) Feasibility assessment for certification and eco-labelling of seafood for tourism market	1	2	1	2	2	8
(v) Assessment of scope for sourcing seafood in Belize for Cruise Tourism Sub-Sector	3	3	3	2	2	13
(vi) Feasibility assessment of scope for value-added production for tourism market	2	2	2	1	2	9
(vii) Legislative amendment of Fisheries Act and Regulations to accommodate Certification and Eco-labelling provisions	2	1	2	2	2	9
(viii) Monitor effect of climate change on life history, distribution, behavior, abundance of snapper and grouper species	1	1	1	1	2	6
(ix) Assess impacts of hurricanes and extreme weather events on income and livelihood of fishers	2	1	1	2	1	7
(x) Build capacity among fishers to cope with the impacts of Climate Change and Climate Variability	2	2	2	2	2	10



# Project Ideas Emanating From Matrices



- **Capture Fisheries Subsector**
  - Assessment of scope for sourcing seafood in Belize for Cruise Tourism Sub-Sector
- **Aquaculture Subsector**
  - Feasibility study on expanding aquaculture certification to all shrimp farms and fish farms
- **Sports fishing Subsector**
  - Strengthen coordination between Fisheries Department and CZMA to improve enforcement in regards to sports fishing
- **Tourism Sector**
  - Develop project for data sharing between BTB and Fisheries Dept. in regards to the linkages between Fisheries and Tourism

# Project proposed



- **Project title:** Qualify and quantify Tourism Seafood Consumption
- **Goal:** Assess and monitor volume, value and range of seafood consumed by tourist'
- **Purpose:** Evaluate amount of fishery product consumed by tourist to effect synergies between Fisheries Sector and Tourism
- **Output:**
  - Evaluate total amt. fishery product consumed by tourist annually
  - Determine the amt. imported fishery product consumed i vs. that produced in Belize
- **Activities**
  - Survey tourist establishments
  - Canvas Customs Dept. to determine range and volume of imports

# Conclusion



- Both the tourism and the Fisheries sectors will experience further growth.
- Neither sector has expressed any desire to create any alignment that would provide fishery products to the tourism market.
- There is no strategic marketing arrangement to produce fishery products directly for tourist consumption.
- There is no definitive marketing strategy to enable greater Belizean participation in producing fishery product to tourist.
- The project recommendation would directly addressing tourist fish consumption demands and, possibly persuade the two sector to form the obvious partnerships (linkages) necessary.