CONTRIBUTION 10.14

National Report on the Status of Fisheries and Aquaculture in SAINT VINCENT AND THE GRENADINES

OVERVIEW

The domestic fishing industry of St. Vincent and the Grenadines (SVG) has traditionally participated in small-scale and artisanal fishing, using traditional fish gear, methods, and vessels. Records indicate that there are approximately one thousand and thirty (1030) registered vessels and twenty-five hundred (2500) people employed within the sector in SVG. SVG has a large shelf inshore fishing area (2,000km^2), a large EEZ (36,300km^2), and a larger fisheries production potential than neighbouring island states. Most of its main fishery resources are shared with neighbouring Eastern Caribbean countries, and relatively little is known of their production potential. SVG's main fisheries are: small coastal pelagic species, accounting for up to 50% of all SVG catch in weight; large pelagic species (regional and open ocean); demersal species including reef species caught to the south of St. Vincent and in the Grenadines; and deep slope species.

The industry contributes approximately 1 - 1.5% of the Gross Domestic Product of SVG with a per capita consumption of approximately 23 lbs of fish across an estimated population of one hundred and nine thousand (109,000) people. Fish landings are estimated at 2.9 million lbs with a corresponding value of EC$ 19.2 million. Fish imports average approximately 1.09 million lbs at a value of EC$ 6.4 million, while fish exports average 1.1 million lbs valued at EC$ 13.1 million (these figures represent the average data 2018 - 2022). Accordingly, St. Vincent and the Grenadines is a net importer of fish and fish products.

The St. Vincent and the Grenadines High Seas fishing fleet operates within the International Commission for the Conservation of Atlantic Tunas (ICCAT) Convention Area, which spans all waters of the Atlantic Ocean and adjacent seas. The High Seas fleet is owned by a foreign consortium which has maintained an amiable working relationship with the Ministry of Agriculture, Forestry, Fisheries, Rural Transformation, Industry and Labour (MAFFRTIL) over the past twelve (12) years. At the time of writing, St. Vincent and the Grenadines has no High Seas fishing vessel on its register.

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1. FISHERIES SUB-SECTORS AT A GLANCE

The fisheries sector boasts a vibrant artisanal fishing fleet that engages in day trips to harvest varying fish stocks within the Exclusive Economic Zone (EEZ) of St. Vincent and the Grenadines. Our current small-scale fleet comprises approximately 1030 registered vessels.

Aquaculture development in St. Vincent and the Grenadines remains on a small scale of production. Efforts are being made into the diversification of the sector with aquaculture becoming a fast-developing sub-sector in fisheries by way of Sea moss farming. On mainland St. Vincent aquaculture production is limited to personal subsistence farms by some people. On the Grenadine islands of Bequia, Canouan, Mayreau and Union Island however, the seamoss (*Eucheuma isiforme* and *Kappaphycus alvarezii*) is commercially farmed and used to make a variety of products including agar, ice cream, and beverages. Sea moss farming provides new prospects for livelihoods since there is now growing interest from international buyers to purchase sea moss from the Caribbean, including St. Vincent and the Grenadines. Therefore, rich potential exists to develop a thriving industry.

There has been development as well in the post-harvest subsector to include a more commercialised approach to fish processing. Post-harvest begins from the point at which the produce is caught which encompasses handling, landing, storage, sale and fish processing. The Fisheries Division continues to inform and train stakeholders about proper fish handling and maintenance of the cold chain to ensure the best quality. They provide information on how to properly store the produce until it's landed at one of the thirty-six (36) landing sites for storage or sale.

The fish may also be acquired by a fish processing establishment of which there are seven (7) in SVG as listed in table 1.

Table 1. List of Licensed Fish Processing Establishments

Fish Processing Establishments	**Location**
1. Sebrina's Lobster Pond	Bequia
2. Bequia Seafood Co. Ltd.	Bequia
3. AIW Kingstown Fish Market	Kingstown
4. Villamar	Mc Kies Hill
5. Union Seafood Ltd.	Clifton
6. Ocean Marine Shipping Co. Ltd.	Owia
7. Rainforest Seafood SVG Ltd.	Calliaqua

These facilities focus on refining/ further developing the product for export. This sub-sector possesses significant potential for expansion especially with the promotion of Blue Economic Development.

The tri-tri fishery commonly known as West Indian Whitebait (*Sicydium plumieri*), although of small size, is one of the important food fishes of Saint Vincent and the Grenadines. Traditionally tri-tri are caught during their migratory period upriver during August to December. Rivers that traditionally accommodated the tri-tri fishery included: Buccament, Richmond, Walliabou, Cumberland, Argyle, Colonaire and Mount Young.

2. PRODUCTION

In 2022, almost half (48.77%) of the contributions to total weights landed for fish species came from the High Seas Fleet. The High Seas fleet was authorised to fish under the flag of St. Vincent and the Grenadines for five (5) months (January – May 2022).

Table 2. Summary of the St. Vincent High Seas fleet Catches. (Source: Fisheries Division)

Species	Landings in metric tonnes				
	2018	**2019**	**2020**	**2021**	**2022**
Yellowfin Tuna	273.6	104.63	225.84	3.534	36.506
Bigeye	355.2	503.58	219.81	137.462	1134.33
Albacore	267.4	211.08	251.73	14.597	43.358
Spearfish	77.3	12.49	8.53	0.565	0.54
Swordfish	27.3	27.11	6.7	29.727	153.807
Sailfish	10	4.76	19.14	0.14	0.25
Mahi mahi	50.7	8.851	4.585	0	0.844
Wahoo	63.3	26.62	29.78	0.15	1.546
Miscellaneous	47	13.23	0	2.435	3.896
Total					

Data on fish landed and marketed at fish landing sites in SVG for 2022 have shown a significant increase in the weight and value when compared with fish landings in 2021 as shown in Table 3. In 2022, a total of 3,184,258 pounds (lbs) of fish were landed and marketed in SVG estimating earnings at XCD $21, 746,763 in sales on the local market. In 2021, fish landings recorded in SVG amounted to 2,738,001 pounds (lbs) with estimated revenue earnings of XCD $17,263,067. These figures indicate that fish landings in 2022 increased by 16.3% in weight and 25.97% in value.

Table 3. Domestic fleet Fish landings 2017-2022 (Source Fisheries Division)

Year	Total Lbs	Total Value (EC$)	Percentage (+/-)	
			Weight	Value
2022	3,184,258	21,746,763	16.3%	25.97%
2021	2,738,001	17,263,067	-19.26%	-18.16%
2020	3,391,212	21,093,118	33.16%	21.66%
2019	2,546,717	17,337,717	3.11%	-7.52%
2018	2,469,934	18,748,394	39.96%	56.53%
2017	1,764,739	11,977,173		

Conch was the main species landed in St. Vincent and the Grenadines however, most of it is exported to the USA and other Caribbean islands. Conch landings accounted for 33.6% of the total landings for 2022, realising earnings of $EC 6.7 million dollars. Other species of economic importance were Jacks (XCD $1.7 million), Yellowfin tuna (XCD $1.7 million), Barracuda (XCD $1.6 million), Dolphin fish (XCD $1.3 million) and lobster (XCD $1 million). During 2022, there were notable increases in Robin, Jacks and Barracuda, in fact, landings of Robin and Jacks were more than twice the amount landed in 2021. Unfortunately, landings of Yellowfin tuna, Dolphin fish and especially Lobsters continue to decrease annually.

Data for fish and fish products exported from St. Vincent and the Grenadines for the year 2022 have shown marginal increases in weight and value when compared to fish exports for 2021. Some 1,194,133 pounds (lbs) of fish and fish products were exported from SVG during the period January to December 2022. Revenue earnings from fish exports amount to XCD $14,621,948. During the corresponding period in 2021, a sum of 1,162,302 pounds (lbs) of fish and fish products was exported from SVG, generating total revenue of XCD $13,613,574. The exportation of fish and fish products for 2022 recorded an increase in weight of 2.7% and value of 7.4%.

In 2022, conch was the main species of export and represented 63.3% of the weight and 69.5% of the value of the total fish and fish products exported from St. Vincent and the Grenadines in 2022. For the period January to December 2022, 782,258 lbs of conch and conch products were exported to several regional and international markets. Most of the exports of this product were exported to the USA, generating a value of XCD $10,285,250. These figures reflect an increase of 28.26% in export of conch and conch products 2022 in comparison to 2021.

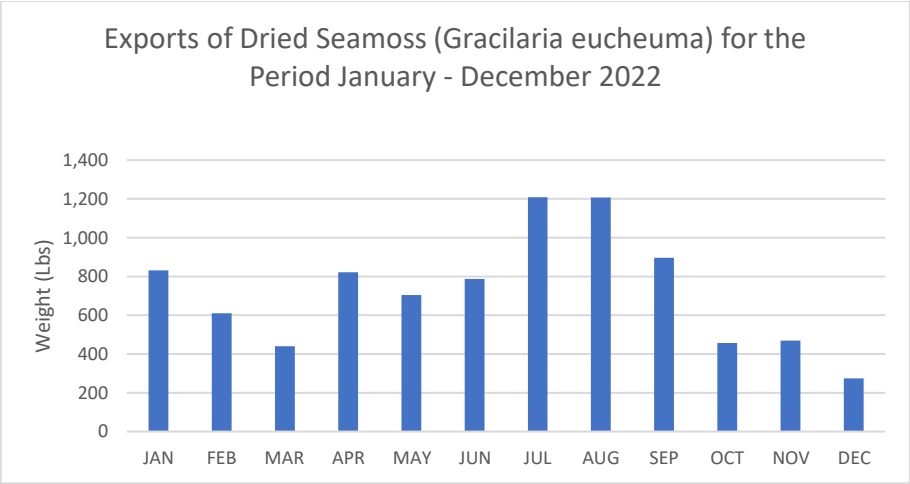

Figure 1. Exports of Dried Sea moss (Gracilaria eucheuma) for the Period January to December 2022

For the January to December 2022 period as shown in Figure 1, a total of 8,709 pounds (lbs) of dried sea moss was exported to both regional and international markets, representing a revenue of XCD $344,475.

3. INDUSTRY OPERATIONS

In SVG, fishing is zoned and categorised. There are six (6) zones and thirty-six (36) landing sites. The sites are further categorised as primary, secondary, or tertiary. A site's assignments into these categories are based on three main variables; the number of fishing boats that regularly land fish; the quantity of fish landed; and the level of infrastructural development existing. There are two (2) primary landing sites (Kingstown & Barrouallie); fourteen (14) secondary sites; and twenty (20) tertiary sites.

The fishing industry in SVG is mostly small-scale with interest in scaling up commercial operations. Our current small-scale fleet comprises approximately 1030 registered vessels with four (4) now unregistered high seas vessels as of October 4, 2022, that ceased operations since May 31st 2022. Fishers operate on an artisanal scale using traditional fishing gear and methods such as: simple and multiple handline techniques, long line fishing, gill netting, seine fishing, pot fishing and trolling. They adopt the day excursions practice to fishing, typically leaving shores around 4am and returning from early afternoon to late evening.

Our value chain is extended into fish processing having seven (7) registered fish processing establishments which are listed in table 1 that contribute largely to fish and fish product exports. Aquaculture is a new but growing industry within the fisheries sector with the establishment of sea moss farms mostly operating from the Grenadines and one (1) on the mainland. Sea moss farmers and or exporters would submit the product to the Fisheries Quality Assurance Unit for a Health Certificate upon satisfactory inspection required by the Customs Department for export regionally and internationally with the USA constituting the largest market.

4. MANAGEMENT MEASURES

To ensure the longevity and sustainability of the fisheries resources in Saint Vincent and the Grenadines, management is of utmost importance. The Fisheries Division pursues the following objectives:

1. Develop and increase the potential of living marine resources to meet the human nutritional needs, as well as social, economic and development goals of the sector;
2. Ensure that the fishing industry is integrated into the policy and decision-making process concerning fisheries and coastal zone management;
3. Take into account traditional knowledge and interests of local communities, small-scale artisanal fisheries and indigenous people in development and management programmes;
4. Maintain or restore populations of marine species at levels that can produce the maximum sustainable yield as qualified by relevant environmental factors, taking into consideration relationships among species;
5. Promote the development and use of selective fishing gear and practices that minimise waste in the catch of target species and minimise by-catch of non-target species;
6. Ensure effective monitoring and enforcement with respect to fishing activities;
7. Protect and restore endangered marine species;
8. Preserve rare or fragile ecosystems, as well as habitats and other ecologically sensitive areas especially coral reef ecosystems, estuaries, mangroves, seagrass beds and other spawning and nursery areas;
9. Promote scientific research with respect to fisheries resources;
10. Cooperate with other nations in the management of shared or highly migratory stocks.

St. Vincent and the Grenadines recognises that additional management measures are needed to ensure the sustainable utilisation of living marine resources and has instituted protection of six (6) organisms listed in table 4.

Table 4. Protected Species and their management measure in SVG.

Protected Species and their management measure in SVG	
SPECIES	**PROTECTION MEASURES**
Corals	**Complete no take without written permission** from Chief Fisheries Officer
Sharks	**Illegal** to fin live shark including tail and discard body or possess any such fin onboard a vessel without the carcass
Parrot Fish	**Complete no take, sell, purchase or possession** of parrot fish or eggs
Sea Turtles	**Complete no harvest/ disturbance/ sale/ possession** of turtles, eggs, or any turtle part and no interference of nest
Caribbean Spiny Lobster	Closed season: **1st May - 31st August** **Illegal** to: catch females carrying eggs, remove lobster eggs, moulting lobsters, weight < 1lb, catch lobsters by any methods other than hand, loop, pot or trap.
Queen Conch	**Illegal** to catch if: shell < 7 inches long, it does not have flared lip, meat < 8 oz.

Gears restrictions such as hook types, net type, mesh size, and spatial and species restrictions on spearguns have also been implemented to guarantee the protection of vulnerable species of the population and promote sustainable harvesting.

Management of marine and coastal habitats to protect biological diversity is crucially important to both fisheries and tourism. There is a network of marine conservation areas introduced as fisheries management tools to protect both biodiversity and vulnerable habitats from the impacts of fisheries and tourism. The largest protected area is the Tobago Cays Marine Park (TCMP) in the Grenadines, successfully managed as a self-funded government institution since 2006. The Fisheries Services is collaborating with a number of management agencies to establish a new marine park on the southeast coast of St. Vincent (Blue Lagoon, Calliaqua, Villa and Indian Bay area) managed on a similar basis and another on the leeward coast ranging from Old Woman Point to Larikai which will be zoned considering resource user inputs.

5. INSTITUTIONAL AND LEGAL FRAMEWORK

In 2000, St. Vincent and the Grenadines received a Red Card from the European Union (EU) which acted as a driver to develop compatible regulations with those of the EU. This action constituted a total ban on the exportation of fish and fish products from the state to any EU country. SVG enlisted the assistance from FAO to update legislation and made the necessary strides towards gaining compliance.

The FAO GCP/INT/313/SWE: ***Support for the implementation of the PSMA and related instruments to combat IUU fishing*** project aims to improve the implementation of international instruments, such as the 2009 FAO Agreement on Port State Measures (PSMA) and complementary international instruments to combat IUU fishing. Experts from the FAO have been working along with the Fisheries Division, the Ministry of Agriculture and the Legal Affairs Department to review a draft of the St. Vincent and the Grenadines Fisheries and Aquaculture Bill.

In August 2022, there was a FAO in-country mission to facilitate the validation and signing of an Interagency Memorandum of Understanding (MOU) to enhance local collaboration and help prevent, deter, and eliminate IUU fishing as well as a review workshop for the draft Fisheries and Aquaculture Bill. This mission culminated in the ratification of a MOU between the Fisheries Division and ten (10) government agencies to further enhance interagency cooperation, coordination, and information exchange to help prevent, deter and eliminate Illegal, Unreported and Unregulated fishing.

St. Vincent and the Grenadines is in negotiation with the United States over two pieces of legislation: the Marine Mammals Protection Act (MMPA) and Moratorium Protection Act. The MMPA concerns the protection of marine mammals and requires that the measures SVG has in place for the protection of marine mammals such as whales and dolphins are comparable to those of the U.S. Importantly, this legislation is not concerned with the targeted fishery for whales and dolphins but rather wants to ensure that they are not being caught in association with other fisheries. SVG has already engaged U.S. authorities in different meetings on this matter and information requested by the U.S. has been provided. The Fisheries Division is awaiting a revision of the fisheries Act and Regulations to have the necessary changes reflected in the law. This should be completed sometime this year or next year. The FAO has also provided guiding documents on marine mammal and sea turtle by-catch for the consideration of the Fisheries Division when structuring new fisheries regulations.

Similar to the MMPA, the Moratorium Protection Act concerns bringing protection measures for marine turtles by SVG and other global trading partners to a point where they are comparable with those of the U.S. The process has just started and so far, there have been two (2) meetings between SVG and U.S. authorities with respect to the matter. The process is moving along smoothly, and another meeting is anticipated towards the end of August.

6. RESEARCH, EDUCATION AND TRAINING

The Fisheries Division, in collaboration with other State Agencies, assists in the collection of water quality information on a regular basis along beaches and would perform beach profiling surveys and visual monitoring assessments on a more adhoc basis.

Some sea turtle conservation efforts continue as several beaches on the Windward side of mainland SVG are regularly monitored. There was a total of forty (40) confirmed nestings for the year with thirty-nine (39) of these being leatherback sea turtles (*Dermochelys coriacea*) and one (1) hawksbill bill sea turtle (*Eretmochelys imbricata*).

The Fisheries Division with assistance from the Blue Marine Foundation undertook a scientific analysis of the status of SVG fisheries with emphasis on conch, lobster, and reef fish. The assessment was conducted using baseline dive surveys, examination of fish landings data, a scientific literature review, and various stakeholder meetings. Community consultations were held in Bequia and Union Island in December 2022 to review the initial findings of the Blue Marine Foundation conch, lobster and reef fish surveys conducted in February and March 2022. The Fisheries Division is awaiting the final survey report.

The Fisheries Division in efforts to ensure fisherfolk safety at sea, conducted a series of Safety-at-Sea workshops under the Climate Change Adaptation project in the Eastern Caribbean Fisheries Sector (CC4FISH). Each workshop comprised classroom/in-house sessions, and a simulation exercise that was conducted at sea. In total, ninety-three (93) fisherfolk - comprising 90 males and 3 females - have been trained from fishing communities through mainland SVG and the Grenadines.

7. KEY DEVELOPMENT TRENDS OVER THE LAST 20 YEARS

In retrospect, the Fisheries sector of SVG has seen significant growth over the past twenty (20) years although there is room for further development. Some of the noteworthy mentions include Aquaculture, Fleet Expansion, Fish processing, Exportation, Involvement of Private Sector stakeholders, National Fisherfolk Organization, and the Introduction to New Fishing Technologies.

Unofficial fisherfolk organisations existed before obtaining any form of verification. There were three (3) main informal groups: Goodwill of Kingstown, Calliaqua fishers, and Barrouallie fishers. The interest in co-operation was present amongst the fishers and meetings were held until the works for the formation of the National Fisherfolk Organization began in 2006 after many previous attempts. Organisations like this offer a bigger voice for fisherfolk in advocacy and allows them access to more collaborative opportunities.

One such opportunity from which fishers were able to benefit was the introduction to FAD fishing. This kicked off initially with fishermen being educated on the importance of the devices. Then, provisional FADs were set up using drums in the late 1990s until more sophisticated devices were introduced under a JICA program in 2007.

A need for developing the fishing fleet of the nation arose in 2003 which birthed the National Fleet Expansion Programme (FEP) in 2006. This programme is geared towards encouraging fishermen to develop their fleet to target more high valued fish and make their trips more economically viable. The

first boat on this program, the *S-Marie-R*, constructed in Mexico, was launched in 2009. The program still runs today and is well utilised by fishers.

Seamoss farming began with a few people in the Grenadines operating for local sale long before its global popularity exploded for being a superfood. Notable growth in sea moss farming commenced in 2012. Since then, the farming capacity has increased, and international buyers are gaining interest in sourcing dried sea moss from our local farmers. It was traditionally used in drinks and punches, but creativity has allowed the addition of ice cream, agar, skin and hair gel to the product list.

The exportation of fresh fish to regional and international markets is no new concept to SVG as the island has been doing it since the 1990s. However, the potential of fish processing has been realised and facilities have been established within the last twenty (20) years. SVG now boasts seven (7) of these establishments, some of which double as exporters. In 2017, SVG resumed the exportation of fresh Tuna Fish. AIW Kingstown Fish market offers smoked and corned fish for local consumers while the other six (6) establishments focus on conch, lobster, and fish. Some of these establishments only export fresh fish while the others export one or a combination of fresh and minimally processed seafood and other value-added products. In 2018, the Fisheries Division endeavoured to engage private sector stakeholders in the fishing industry by offering fisheries centres on lease. Union Island, Bequia, Owia & Calliaqua fisheries centres are now occupied and run by private entities.

8. PROJECTIONS FOR FUTURE ADVANCEMENT OF THE SECTOR AS WE TRANSITION TOWARDS A BLUE ECONOMY

The overarching projection for the fisheries sector is to create an enabling environment conducive to the sustainable management and development of a growing fisheries and aquaculture sector. This includes promoting sustainable and efficient fishing practices, the supply of quality fish and fish products for local food and nutrition security and for fulfilling international trade standards, facilitating technology and skills development and transfer among stakeholders, and promoting fisheries governance through participatory resource management regimes.

Projections

- Strengthening of the Blue Economy via technical and financial support to the fisheries sector. These would take the form of training stakeholders in Hazard Analysis Critical Control Point (HACCP) certification, safety at sea, navigation and seamanship. Sea moss production and export capacity is built through the NGO sector with the Fisheries Division supporting this initiative through mapping and zoning, as well as the development of a licensing mechanism
- Promote and facilitate fleet improvement and expansion
- Improve collaboration with enforcement agencies through a MOU to aid in information exchange and cooperation in the fight to prevent, deter and eliminate Illegal, Unreported and Unregulated (IUU) fishing
- Enhance production, marketing and distribution of fish, seafood and associated products locally, regionally and internationally
- Continue work to strengthen institutional capacity of fisherfolk and other stakeholders through involvement in trainings and meetings
- Compliance with applicable international laws, regulations and best practices to facilitate the lifting of the IUU “Red Card”

- Continue stock assessments to establish a basis for sustainable harvest of various fish and seafood in the EEZ.

Challenges

- Fisherfolk are generally resistant to change, and this may present some challenges with the adoption of new practices and outlooks.

Constraints

- The financial and human capital might not always be readily available to implement initiatives as needed, and this could retard the transition and the uptake of novel practices by fisheries sector stakeholders.

Opportunities

- There has never been a better time for Blue Economy initiatives in SVG as the GoSVG understands the importance of this economy to life and livelihoods and has expressed several commitments in this regard. It is expected that Blue Economy interventions would be prioritised and expeditiously implemented. Some of the opportunities and projects are:
    - Blue BioTrade: Promoting sustainable livelihoods and conservation of marine biodiversity in the Caribbean region
    - Project for Strengthening sustainable use and management of coastal fisheries resources in the CARICOM countries (COASTFISH)
    - Support for the implementation of the PSMA and related instruments to combat IUU fishing (FAO GCP/INT/313/SWE) - Legislative review
    - TNC - Building a sustainable future through the seamoss industry in St. Vincent and the Grenadines
    - Conserving biodiversity and reducing land degradation using a Ridge to Reef Approach (R2R GEF6)
    - SVG Coastal and Marine Ecosystems Management Strengthening Project (GEF7)
    - Adapting to a new reality: managing responses to influxes of sargassum seaweed in the Eastern Caribbean as ecosystem hazards and opportunities (SargAdapt)
    - UNDP Japan Grant Aid - Improving National Sargassum Management Capacities in the Caribbean
    - Pioneering a Blue-Green Economic Development Model for Coastal Adaptation, Livelihoods and Sustainability in St. Vincent
    - Strengthening Resilience Capabilities in the Fisheries Sector through Sustainable Capture Fisheries and Value-Added Products (BioSpace)
    - FAO Drone Mapping and Geospatial Analysis Project
    - World Bank Unleashing the Blue Economy of the Caribbean (UBEC) Project and its subsidiary component the Crisis Response Window Food Insecurity Project
    - World Bank Volcanic Eruption Emergency Project