



Caribbean Regional Fisheries Mechanism

ISSN: 1995 – 1132

CRFM Technical & Advisory Document Series
Number 2022 / 10

**REPORT OF THE ELEVENTH MEETING OF THE
CRFM / CARICOM FISHERIES AND
AQUACULTURE PRIORITY COMMODITY
WORKING GROUP (FISHCOM WG)**

24 November 2022

CRFM Secretariat
2022

CRFM Technical & Advisory Document - Number 2022 / 10

Report of the Eleventh Meeting of the CRFM/CARICOM Fisheries and Aquaculture Priority Commodity Working Group (FISHCOM WG)

www.crfm.int

www.youtube.com/TheCRFM

www.facebook.com/CarFisheries

www.twitter.com/CaribFisheries

CRFM Secretariat
Belize, 2022

CRFM TECHNICAL & ADVISORY DOCUMENT – Number 2022 / 10

Report of the Eleventh Meeting of the CRFM/CARICOM Fisheries and Aquaculture Priority Commodity Working Group (FISHCOM WG)

@ *CRFM 2022*

All rights reserved.

Reproduction, dissemination and use of material in this publication for educational or non-commercial purposes are authorized without prior written permission of the CRFM, provided the source is fully acknowledged. No part of this publication may be reproduced, disseminated or used for any commercial purposes or resold without the prior written permission of the CRFM.

Correct Citation:

CRFM, 2022. Report of the Eleventh Meeting of the CRFM/CARICOM Fisheries and Aquaculture Priority Commodity Working Group (FISHCOM WG). *CRFM Technical & Advisory Document*, No. 2022 / 10. 6pp.

ISSN: 1995-1132

ISBN: 978-976-8293-89-3

Published by the Caribbean Regional Fisheries Mechanism Secretariat,
Belize and St. Vincent and the Grenadines.

ACRONYMS AND ABBREVIATIONS

BDTG	Business Development Thematic Group
CABA	Caribbean Agri-Business Association
CAHFSA	Caribbean Agricultural Health and Food Safety Agency
CARICOM	Caribbean Community
CARISEC	CARICOM Secretariat
CFTDI	Caribbean Fisheries Training Institute
CNFO	Caribbean Network of Fisherfolk Organizations
CPSO	CARICOM Private Sector Organization
CRFM	Caribbean Regional Fisheries Mechanism
FISHCOM WG	CRFM/CARICOM Fisheries and Aquaculture Priority Commodity Working Group
IICA	Inter-American Institute for Cooperation on Agriculture
LCL	Less than Container Load
LIAT	Leeward Islands Air Transport
MTF	Ministerial Task Force
OECS	Organisation of Eastern Caribbean States
USA	United States of America
WGA	Working Group on Sustainable Aquaculture

TABLE OF CONTENTS

ACRONYMS AND ABBREVIATIONS	IV
INTRODUCTION.....	1
AGENDA ITEM 1. OPENING AND WELCOME.....	1
AGENDA ITEM 2. REVIEW OF THE OUTCOME OF THE REGIONAL FISH PROCESSORS' FORUM	1
AGENDA ITEM 3. NEXT STEPS	2
AGENDA ITEM 4. ADJOURNMENT.....	5
APPENDIX 1: LIST OF MEETING PARTICIPANTS	6

INTRODUCTION

1. The Eleventh Meeting of the CRFM/CARICOM Fisheries and Aquaculture Priority Commodity Working Group (FISHCOM WG) was convened electronically on 24 November 2022. Seven persons (3 males and 4 females) from the CARICOM Secretariat, the CARICOM Private Sector Organization (CPSO), Suriname Seafood Association and the CRFM Secretariat participated in the Meeting. The Participants' List is given in Appendix 1.

AGENDA ITEM 1. OPENING AND WELCOME

2. The meeting was called to order at approximately 3:10 p.m. EC time (1:10 p.m. BZE time) by Dr. Sandra Grant, Deputy Executive Director, CRFM Secretariat, who served as Chairperson for the Meeting. The Chairperson welcomed all and stated that the objective of the eleventh meeting of the FISHCOM WG was to debrief on the Regional Fish Processing Industry Forum, consider the main challenges and opportunities for processors, assess ways the FISHCOM WG could assist the Regional Fish Processing Industry, and determine the next steps.
3. The Meeting's agenda is shown below

Item 1: Opening and welcome

Item 2: Debriefing of the Regional Fish Processing Industry Forum, highlighting the main challenges and opportunities for Processors and how the FISHCOM WG could assist.

Item 3: Next Step (Working Meeting on Transportation to assist Processors)

Item 4: Adjournment

AGENDA ITEM 2. REVIEW OF THE OUTCOME OF THE REGIONAL FISH PROCESSORS' FORUM

4. The Chairperson presented this item. She gave a brief summary (purpose, preparations, attendance, etc.) of the Processors' Forum, which was organized by the FISHCOM WG as part of its work plan activities for 2022.
5. The Fish Processors' Forum was intended to provide a platform for processors to share their experiences and challenges; consider opportunities, be made aware of available resources (digital directory & e-library) and network with each other. Four mail outs and WhatsApp messages to inform persons (over 139 Processors) about the Forum and encourage participation were done in the weeks leading up to the event. Sixty (60) persons participated in the Forum, about 50 percent of whom were processors representing eight (8) Caribbean states. There was also representation from national Fisheries Divisions in CRFM Member States, the Caribbean Network of National Fisherfolk Organizations (CNFO) and regional organizations (CAHFSA, CABA, CPSO, CFTDI, IICA), as well as the CARICOM and CRFM Secretariats. Two key challenges facing processors emerging from the Forum's discussions were transportation, and availability and price of raw materials.

Discussion

6. Following presentation of her summary, the Chairperson invited participants to share their thoughts about the Processors' Forum. The following are the main points emanating from the discussion.

7. A key challenge identified by the processors is access to markets intra-regionally, particularly as it relates to transportation (air and marine transportation). Operators in SVG seem to be particularly affected, however, more information was needed to determine the root causes and appropriate interventions to address the transportation constraint. The notion of collaboration among the processors in these islands was advanced as a possible intervention at the Forum. Subsequent consultation with the Business Development Thematic Group (BDTG) (tasked with addressing the issue of transportation) also pointed to the need for collaboration/joint action among processors in addressing the transportation issue. Hence, interaction between processors and representatives from the transportation sector is needed.
8. There also appears to be an information constraint, specifically inadequate information about market opportunities, and the market demand that exists intra-regionally. The BDTG is devising a transportation logistics information website which is expected to provide information regarding product/market demand that could assist processors with getting into markets. However, more micro work among processors is needed to enable them to overcome this constraint.
9. The availability of raw materials was also flagged as a challenge affecting processors, particularly in Trinidad and Tobago. Guyana has also seen declines in harvest, and this may be the case in other Member States, as well. Declining production is a broader issue that requires resource management and intervention of the fisheries authorities particularly if the root cause is land-based activities, which will require specifically crafted interventions, as management within the fishery only will not resolve the issues.

AGENDA ITEM 3. NEXT STEPS

10. For this item the Chairperson presented the following 8-point action list and invited discussion.
 - ✓ Mail out – highlighting main points from the Processors’ Forum
 - ✓ Finalize Inventory Report
 - ✓ Regional Fish Processors’ Forum Report
 - ✓ Digital Directory / finalize e-library (mail out on use of the e-library)
 - ✓ Finalize FISHCOM Membership
 - ✓ Document: *Fish Agri-Food Investment Business Opportunities along the Fish Value Chain*
 - ✓ Working Meeting on Transportation with Processors (Mar/Apr 2023)
 - ✓ Next FISHCOM WG meeting early 2023

Discussion

11. A WhatsApp group for processors was started as several processors do not have email access, but have cellular phones with WhatsApp. This medium was used to inform these processors about the Forum. Since then, interactions between processors on the WhatsApp group have been observed. Whether this WhatsApp group should be expanded to include other processors and the FISHCOM WG Members was queried. It was agreed that the WhatsApp group should be expanded as suggested.
12. There are good transportation connections between Suriname, Guyana, Barbados and Trinidad, however, this is not the case for all of the Caribbean countries. It is sometimes easier to get products from some CRFM countries (Suriname, Belize) to international markets (Europe, USA) than to get them to other CARICOM states. It was opined that the transportation issue in the Caribbean is one that has been discussed for years but remains unresolved; even governments seem unable to successfully tackle the intra-regional transportation problem.

13. It was noted that the OECS States seem to be most affected by the transportation issue, possibly due to the collapse of LIAT and the smallness of the producers/processors.
14. It was suggested that an overview of the transportation system (number of vessels and aircrafts, schedules, etc.) in the region could be done, if such a study does not already exist, to assist in determining suitable interventions.
15. It was noted that the issue was not so much the number of vessels or aircraft, but rather that many processors are too small as individuals to exert real demand on the transportation services. However, if the small processors could collaborate and consolidate, it may be possible to engage with the transportation services providers to determine what may be possible. It was also noted that fish and fish products are perishable commodities that require the proper type of containerization, etc., when being transported. The dialogue with processors needs to continue so that the issues could be better understood.
16. Regarding finalization of the FISHCOM WG Membership, it was noted that there was one slot to be filled and it was suggested that Mr. Alvin Henderson, an aquaculture farmer and processor, and President of the Belize Shrimp Growers Association could be invited to be a member of the WG. This suggestion was accepted, and it was agreed that correspondence inviting Mr. Henderson to participate in the FISHCOM WG will be prepared and sent to him.
17. The document: *Fish Agri-Food Investment Business Opportunities along the Fish Value Chain* - N. Durrant (CARISEC) was developing the draft document on behalf of the FISHCOM WG. The Meeting was advised that proper trade data, as well as information regarding challenges and opportunities in the fish processing sector coming out of the Processors' Forum was now available and this will help to inform completion of the document, which will be circulated to FISHCOM WG for review, prior to finalization.
18. Based on the call for attention to the issue of intra-regional transportation coming out of the Processors' Forum, CRFM Secretariat on behalf of the FISHCOM WG has reached out to the BDTG to see how that group may be able to assist in addressing the issue and in organizing a meeting with actors involved in the transportation sector. A formal letter in this regard will be sent to IICA (convener of the BDTG). It is expected that the meeting between the processors and representatives from the transport sector will be convened in March or April 2023, as a fair amount of preparatory work will have to be undertaken.
19. It was suggested that FISHCOM WG should prepare for some interaction with the Ministerial Task Force (MTF) overseeing the 25% by 2025 program, to bring some of the issues/challenges that may impact achievement of the 25% by 2025 goal that were shared at Processors' Forum to the MTF's attention. The MTF usually met monthly, so there may be opportunity to make a short presentation at one of the MTF meetings. It was further suggested that CNFO could be brought into the dialogue and/or the working meeting as they are one end of the transportation continuum and the fishers too have indicated constraints to increasing production to meet the 25% by 2025 goal.
20. It was suggested that a presentation outlining the constraints (including the negative impacts of land-based activities on fisheries and climate change) that the fisheries sector (processors and fishers) is facing in meeting the 25% by 2025 mandate will be prepared and presented to the MTF. This activity will be added to the action list. Following some further discussion, it was agreed that the presentation to the MTF will focus on the transportation issue as this has been prioritized by the MTF.

21. With regards to the availability of raw materials, the issues related to land-based activities (agricultural run-off, soil erosion, impacts on coral reefs, other industrial activities, and oil and gas) that impact negatively on fisheries resources have been largely overlooked and these issues, as well as the reality of climate change, need to be brought into the mainstream discussion.
22. Reference was made to the CPSO's proposal for using shrimp as a commodity to address the 25% by 2025 mandate and the CPSO representative asked to update the Meeting on this. It was indicated that based on the shrimp data, the region was a net exporter of shrimp with only a small amount of shrimp imported. The opportunity is really to grow exports using the Belize and Guyana experiences as examples; and to look at aquaculture development across the region to drive local consumption, investments and exports.
23. In terms of the transportation issue, CPSO can lend some support in bringing the issue to the attention of the MTF, since CPSO is included on the MTF meeting agenda. The BDTG, CRFM, the Private Sector and the CARICOM Transportation Sub-Commission should be engaged so as to take a comprehensive look at intra-regional transportation, not just transportation of fish, mindful though that fish has certain peculiarities, but transportation across the board. For small producers/processors, the specific transport issue is that they generally have less than container load (LCL), as container loads are being transported, albeit at a higher cost. How to deal with LCL also requires some consideration.
24. At the Forum, The Bahamas indicated that they imported a lot of shrimp; hence, there may be opportunity for the region to supply The Bahamas with shrimp, both wild-caught and cultured. The CPSO representative indicated that The Bahamas could be approached jointly (CPSO/CRFM) or CPSO could reach out to The Bahamas directly (Adrian LaRoda, CNFO) to build out the investment business case, which could be done in concert with the CNFO and/or in concert with the processors/processors' groups.
25. The need to have the investment business case for shrimp developed was highlighted, and it was suggested that this probably warrants a more focused meeting with shrimp producers and processors.
26. It was opined that there was not much scope for increasing production except through aquaculture; marine resources were limited, and over-exploitation should be avoided. The discussion should focus on aquaculture development as a whole and the investment business case should include aquaculture in general and not one species. Furthermore, there is limited shrimp in the marine environment that can be exploited.
27. It was opined that the notion of increasing production through expanding aquaculture was not really applicable to the region. In the case of shrimp, there may be some possibilities as the Member States involved in shrimp production (Guyana/Belize/Suriname) have the space and other resources, including water, that could accommodate that, but this is not the case for other Member States. Most CRFM Member States can only engage in subsistence aquaculture because of the reality of space. In the context of 25% by 2025, regardless of the production, the transportation problem remains; thus making it apparent that the production and transportation issues have to be dealt with in tandem.
28. It was argued that the transportation issue notwithstanding, aquaculture production at the subsistence level for the domestic market could be increased, which would reduce the reliance on imports. In response, it was pointed out that in many CRFM Member States increasing production through land-based aquaculture and mariculture (nearshore) was not feasible as, in the case of mariculture, the nearshore area is already being used for marine transportation and tourism, among other activities. In terms of land-based aquaculture, the states are constrained by the topography, water availability, and existing industries/activities.

29. In considering increasing production through mariculture and aquaculture, perhaps an approach may be to treat with production corridors as done for other commodities such as corn, soy, etc., in a manner as being advanced by Belize, Suriname and Guyana, with the understanding that not all areas within the Community can be involved in the production of everything. Production should be commercially driven to ensure sustainability and with the understanding that every Member State may not be able to participate, due to the construct of their economies and existing industries. Whatever advances in aquaculture/ mariculture are made the approach should be from a Community perspective.
30. The utility of such an inter-related perspective was acknowledged, bearing in mind that there is an interaction between the species chosen, the country chosen and the nature of the culture process. It was also pointed out that distinction does not necessarily have to be done on a country-by-country basis, but rather on a case-by-case basis as small and medium-scale aquaculture production can also be profitable.
31. It was suggested that perhaps through the Working Group on Aquaculture (WGA), other aquaculture commodities that may be suitable for development and investment, while developing the investment business case for the shrimp, could be considered. A focused meeting with the shrimp producers/processors across the region will be arranged for early 2023.

AGENDA ITEM 4. ADJOURNMENT

32. There being no further interventions, the Chairperson thanked participants for their time and attention. She also took the opportunity to thank FISHCOM WG members for their hard work and support during the year to ensure that the FISHCOM WG completed all 2022 Work Plan activities.
33. The Meeting was adjourned at 4:27 p.m. EC time (2:27 p.m. BZE time).

Conclusions/Decisions

- i. The WhatsApp group should be expanded to include the FISHCOM WG members, and other processors as far as possible.
- ii. Mr. Alvin Henderson, aquaculture farmer and processor, and President of the Belize Shrimp Growers Association should be invited to be a member of the WG. Correspondence to this effect will be sent to Mr. Henderson.
- iii. Mr. N. Durrant will complete the document: *Fish Agri-Food Investment Business Opportunities along the Fish Value Chain*, on behalf of the FISHCOM WG and circulate to FISHCOM WG members for review, prior to finalization.
- iv. The CRFM Secretariat on behalf of the FISHCOM WG will organize a meeting between processors and the transportation sector. The Business Development Thematic Group will be invited to assist in organizing the meeting. A formal letter in this regard will be sent to IICA (convener of the BDTG).
- v. A presentation outlining the constraints that the fisheries sector, particularly the transportation constraint, is facing in meeting the 25% by 2025 mandate will be prepared and presented to the MTF. This activity will be added to the FISHCOM WG action list.
- vi. The CRFM Secretariat on behalf of the FISHCOM WG will organize a meeting with shrimp producers/processors to inform development of the investment business case.

APPENDIX 1: LIST OF MEETING PARTICIPANTS

Name & Designation	Address	Email Contact
Mr. Nigel Durrant Agricultural Trade Specialist	Office of Trade Negotiations (OTN) Caribbean Community (CARICOM) Secretariat Turkeyen, Georgetown GUYANA Tel: (592) 222-0001 to 75, ext 2258 / (592) 629-4275	Nigel.durrant@caricom.org Durrant.nigel@gmail.com
Mr. Sandiford Edwards Technical Expert	CARICOM Private Sector Organization #1 Murray Street, Woodbrook, Port of Spain TRINIDAD & TOBAGO Tel: (868) 273-5826	sedwards@thecpso.org
Ms. Joyce Naar	Suriname Seafood Association	joycenaar@gmail.com
Dr. Sandra Grant Deputy Executive Director	CRFM Secretariat Princess Margaret Drive, Belize City BELIZE Tel: (501) 223-4443	sandra.grant@crfm.int
Mr. Peter A. Murray Advisor, Fisheries Management & Development		Peter.a.murray@crfm.int
Ms. June Masters Statistics and Information Analyst	CRFM Secretariat First Floor, TEKA Building, Arnos Vale P. O. Box 2427, Kingstown ST. VINCENT & THE GRENADINES Tel: (784) 458-4269 / 456-4628	june.masters@crfm.net
Ms. Pamela Gibson Administrative Secretary (Meeting Rapporteur)		crfmsvg@crfm.int

The CRFM is an inter-governmental organization whose mission is to “Promote and facilitate the responsible utilization of the region’s fisheries and other aquatic resources for the economic and social benefits of the current and future population of the region”. The CRFM consists of three bodies – the Ministerial Council, the Caribbean Fisheries Forum and the CRFM Secretariat.

CRFM members are Anguilla, Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago and the Turks and Caicos Islands.

CRFM Headquarters

secretariat@crfm.int

Tel: (501) 223-4443 - Fax: (501) 223-4446
Belize City - Belize

Eastern Caribbean Office

crfmsvg@crfm.int

Tel: (784) 458-4269 or 456-4628
Arnos Vale - St. Vincent & the Grenadines

www.crfm.int

www.youtube.com/TheCRFM

www.facebook.com/CarFisheries

www.twitter.com/CaribFisheries



Caribbean Regional Fisheries Mechanism



www.crfm.int