EUROPEAN UNION

The Effects of Liberalization and Trade Related Policies on Fisheries and Measures Required for their Sustainable Development in the CARIFORUM / CARICOM Region

PART A

Project Commissioned

by the

CARIBBEAN REGIONAL FISHERIES MECHANISM (CRFM) SECRETARIAT
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We also wish that the outcome of this project would contribute to the development of the regional fishery and also to the body of information relevant to this resource.

Lloyd B. Rankine (Ph.D.)
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Acronyms

ACP	African Caribbean and Pacific States
AoA	Agreement on Agriculture
APEC	Asia Pacific Economic Cooperation
CARIBCAN	Caribbean Canada
CARICOM	Caribbean Community
CARIFORUM	(Antigua and Barbuda, Bahamas, Barbados, Belize, Dominica, Dominican Republic, Haiti, Grenada, Guyana, Jamaica, St Kitts and Nevis, St Lucia, St Vincent) and the Grenadines, Suriname, Trinidad and Tobago. CARIFORUM comprises all but one (Montserrat) CARICOM countries, plus Haiti and the Dominican Republic.
CBERA	Caribbean Basin Economic Recovery Act
CBI	Caribbean Basin Initiative
CBPTA	Caribbean Basin Trade Partnership Act
CET	Common External tariff
CFIA	Canadian Food Inspection Agency
CFR	Code of Federal Regulations (Canada)
CFRAMPD	CARICOM Fisheries Resources Assessment and Management Programme
CIDA	Canadian International Development Agency
CITES	Convention on International Trade on Endangered Species
CRFM	Caribbean Regional Fisheries Mechanism
CSME	CARICOM Single Market and Economy
DR	Dominican Republic
EBA	Everything But Arms
EEC	European Economic Community
EEZ	Exclusive Economic Zone
EU	European Union
FAO	Food and Agriculture Organization
FAS	Foreign Agricultural Service
FDA	Food and Drug Administration
FTAA	Free Trade Area of the Americas
GAP	Good Agricultural Practises
GATT	General Agreement on Tariff and Trade
GDP	Gross Domestic product
GDP	Gross Domestic Product
GHP	Good Hygene Practises
GMO	Genetically Modified Organisms
GSP	Generalized System of Preferences
HACCP	Hazard Analysis and Critical Control Points
HS	Harmonized System
IAFIS	International Association of Food Industry Suppliers
ICFA	International Association of Food Industry Suppliers
ICFO	International Cooperative of Fisheries Organization
ICRAFD	INTEGRATED CARIBBEAN REGIONAL AGRICULTURAL & FISHERIES DEVELOPMENT
ICSF	International Collective in Support for Fish Workers
IFFO	International Fishmeal and Fish Oil Organization
IFIA	International Association of Fish Inspectors
IFOAM	International Federation of Organic Agricultural Movement
IFQ	Individual Fishing Quota

ISO	International Standards Organization
ISSC	Interstate Shellfish Sanitation
JAS	Japanese Agricultural Standards
LDC	Less Developed countries
MDC	Most Developed Countries
MFN	Most Favoured Nation
MSC	Marine Stewardship Council
NAFTA	North America Free Trade Association
NGO	Non Governmental Organization
NSSP	National Shellfish Sanitation Programme
NTM	Non Tariff Measures
OECD	Organization for Economic Cooperation and Development
OECS	Organization of Eastern Caribbean States
OIE	Office Internationale des Epizooties
QMP	Quality Management Programme Initiative
QMPI	Quality Management Programme
RAP	Regulatory Action Plan
SCM	Agreement on Subsidies and Counterveiling Measures
SPS	Sanitary and Phytosanitary Measures
TBT	Technical Barrier to Trade
TED	Turtle Excluder Device
UN	United Nations
UNCLOS	United Nations Convention on the Law of the Sea
UNEP	United Nations Environmental Programme
US	United States (of America)
USA	United States of America
USD	United States Dollar
USDA	United States Department of Agriculture
VAT	Value Added Tax
WTO	World Trade Organization
WWF	World Wide Fund for Nature International

Executive Summary

I. Introduction and Background

- "Capture fisheries" represent a major economic activity in the CARICOM Region, especially in the towns and villages located in the coastal and riverine zones. In many cases, this activity represents the only form of employment, income generation and major source of protein supply. Given the location of this resource, we argue that it represents a major food reservoir and bank for the respective national populations that constitute the Caribbean. Fishery resource then becomes multifunctional in the role it plays in Caribbean economic development. Despite this, the sector is under-exploited and under-researched.

- Fisheries' is being drawn into the waves of globalization and trade liberalization. The role that international trade plays in the fisheries sector globally is a very important one as some 40% of the total world production of fish and fish products, valued at $US52 billion, was traded internationally in 1996, and is constantly increasing. Regional and international markets for fish and fish products are becoming increasingly integrated therefore the ability of developing countries to trade in these products is critical on the performance of the fisheries sector.

- A large number of CARIFORUM/CARICOM countries rely on the fisheries sector to generate employment, income, foreign exchange and other benefits. As such, they would need to closely monitor the move towards increased trade liberalization taking place at the level of the WTO, FTAA ad other forums of trade negotiations. The Region should also identify the opportunities and threats to the development of its fisheries. It is against this background that CRFM Secretariat commissioned this study to commence the process of detailed examination of global developments and their possible impact on the Caribbean fishery resource.

- This study was conducted within the broad framework of the fisheries component of the Integrated Caribbean Regional Agricultural and Fisheries Development (ICRAFD) Programme. The main objective of this programme was to extend the activities of the CARICOM Fisheries Resource Assessment and Management Programme (CFRAMP) to include The Bahamas, Suriname, Dominican Republic and Haiti to ensure their integration into this regional initiative in order to improve the sustainable development and utilization of the fishery resources of the Region. The project will also extend benefits in fishery

surveillance and enforcement, marketing, processing and training to all CARIFORUM countries that have already benefited under CIDA supported CFRAMP projects.

II. Terms of Reference

In order to fully appreciate the situation on globalization and its likely effect on fisheries development in the Region as well as the trade in fish and fishery products regionally and internationally, the CRFM Secretariat commissioned this study with the following terms of reference:

(i) Review the current situation and identify the critical issues in such areas as fisheries, trade policy development and implementation, tariff and non-tariff barriers, quality assurances and safety standards and eco-labeling that could affect the development of the fisheries sector in the CARIFORUM/CARICOM Region as well as the Region's capacity to trade.

(ii) Recognize existing international fishing agreements, e.g., UNCLOS II and the FAO Code of Conduct for Responsible Fishing.

(iii) Examine the increasing influence of CITIES on the management and trade in certain species, e.g. conch.

(iv) Propose a strategy and set out a project proposal to address the issues that constrain the development of the fisheries sector as well as restrict the Region's ability to influence current trade negotiations, and the opportunities to benefit from the resulting trade liberalization agreements.

III. Objectives of the Consultancy

- Three broad objectives were identified for the study:
    - To review the situation regarding globalization and identify critical issues that could affect the development of the fisheries sector in the CARIFORUM/CARICOM Region and examine the extent to which they would restrict (i) the Region's ability to influence current trade negotiations and (ii) opportunities to benefit from the resulting trade liberalization agreements
    - To improve the understanding of the economic, environmental and social effects of trade liberalization and trade related policies including subsidies, and to recommend

trade policy reforms in order to contribute to sustainable fisheries development and management in the Region; and

- To define a strategy and project proposal to address issues that could hinder development of the fisheries sector

- The many areas for examination in the study should include trade policies, integration and regulations, fishery management systems, fish production and the status of fishery resources; trade statistics for the export and import of fish products, market intelligence, level of participation in the current regional and international trade negotiations including an appreciation of the issues that are likely to affect fisheries trade.

- "Subsidies" and its role in fisheries development was suggested for special mention in terms of the following:

  - *the current nature and extent of subsidies and other forms of incentives provided by governments to the fisheries sector*

  - *identify and document the nature and magnitude of the impact of subsidies on the sustainability of the fisheries resources; including any relationship that may exist between subsidies, over-capacity and over-fishing; and*

  - *identify and document the nature and magnitude of subsidies and the trade in fish and fish products.*

IV. General Methodical Approach to the Conduct of the Study

- The methodical approach adopted in the conduct of the study comprise the following steps:

  - A comprehensive review and interpretation of the specific terms of reference identified for the study

  - The conduct of field investigations in the major countries of interest: Jamaica, Guyana, Bahamas, Belize and Surname

  - Development of a profile of the fish sector comprising exploitation and production levels, trade flows, and other country specific issues.

  - Analysis and synthesis of the data and other information collected through desk research and review of published reports on the fisheries sector

- Identification of factors that could constrain the development of the Regional fishery thus making the Region unable to benefit from the opportunities resulting from trade liberalization agreements. It also highlights some of the risks that may arise from an ill-prepared entry into trade negotiations on "fisheries".

V. Data Sources and Constraints

- **Data Sources:**
  - The results of this research on the fishery sector are based on data from a number of sources. These include published reports, results of studies conducted on the Region's fishery as well as internet databases; conferences and workshop presentations, primary data extracted from major stakeholders, regional fishery technicians, policy makers, itinerant fishermen, fishery organizations including cooperatives, private sector entrepreneurs, technocrats and other officials from the fishery administrative units.
  - We deem these datasets to be a true representation of the current situation of the fishery. In this regard, we wish to note the existence of inter-source discrepancies in the datasets, but these were not significant enough to distort trends and developments observed in the sector. Given the importance of accurate data in areas such as resource management, revenues, costs, and support to the sector, the Region may well be advised to invest additional resources in upgrading the quality of fishery data.

- **Constraints**
  - Inadequate preparation and timely submission of data and other information requested at the country level. However, some of these deficiencies were corrected during the field visits to the specific countries. Fishery staff members were able to fill these gaps, if only on a qualitative basis.
  - Failure to obtain and distill detailed information in the important area of subsidies. The brevity of the time allocated for the conduct of the field investigations and the lack of preparation at the country level to receive the research effort.

The main components of the study include:

Part A

1. Overview of Global Fishery
    - **a.** Total world fish catch
    - **b.** Major fishing grounds
    - **c.** Major world producers
    - **d.** Major exporters and importers
    - **e.** Trade flow and products

2. Treaties and Trade Agreements
    - **a.** Fishery Treaties
    - **b.** Trade Agreements

3. Preferential Trade Agreements
    - **a.** Unilateral and Bilateral Agreements
4. Trade and other Policies in various countries
5. Health and Non-Tariff Policies in various countries
6. Overview of CARICOM Fishing Industry
7. Summary of major Findings, elaboration and major findings, strategies and projects

Part B

1. Country Profiles
    a. Jamaica
    b. Guyana
    c. Belize
    d. Bahamas
    e. Suriname

VI. Organization and Structure of the Report

Part A constitutes the main report.

- Chapter 1 is the introduction. It sets out the background to the study, the terms of reference, the specific areas to be highlighted, objectives, the general methodological approach, and

constraints. Chapter 2 sets out an overview of the global fishery. Here we highlight data on production and trade flows, utilization and consumption levels as well as profiles of major commercial species exploited. Fishery treaties, global trade agreements and preferential trade agreements are highlighted in Chapter 3. These include sequentially, UNCLOSII, FAO Code of Conduct and CITES; WTO, FTAA, CSME and EU/ACP, Caribcan and CBI.

- Chapter 4 reviews trade policy issues other regulatory and specific market entry requirements, the issue of incentives and support including subsidies and the WTO. The Chapter also includes a review of the infrastructure, landing sites, refrigeration and other facilities used in the food supply chain. Health and food safety issues specific to the export of fishery (SPS, HACCP and bio-terrorism) are set out in Chapter 5.
- In Chapter 6, an overview of CARICOM fishery is presented. Here we highlight profiles of production and trade, major exporters and importers and a brief summary of policy mechanisms that guide trade in regional fishery.
- Chapter 7 is divided into two parts. The first part summarizes the major findings of the study. The second part outlines specific project proposals to remove constraints to the development of the fishery; prepare fishery technicians for global negotiations on trade in fisheries and identify ways in which the region can safeguard and benefit from global developments.

VII. Major Findings

World Production, Exports and Consumption

- **Overview of the Global Fishery:** Total world catch averaged 129 million tonnes during 1995 to 2001 and was dominated by pelagic, fresh water diadrom and demersal. Major species caught were mollusks, crustaceans and cephalopods. These came mainly from the Pacific, Atlantic and Indian Oceans.
- Trends in exports increased significantly between 1999 and 2001 and were dominated by a mixed group of countries such as Thailand, China, Norway, USA, Chile, Canada, Spain and Vietnam. Leading exporting countries were from a similar grouping, led by Japan followed by the USA. It was estimated that 39% of the fish produced in 2002 was marketed fresh for human consumption, 20% frozen, 9% canned and 8% cured. An estimated 24% was processed into animal feeds and oils.

- Global per capita consumption of fish was predicted to increase from 16 kg in 2002 to 20 kg in 2030. This increase is expected to occur mainly in South Asia by 62%, Latin America and the Caribbean by 50% and China by 84%. FAO studies indicate a world average per capita consumption of 19-20 kg, a reduction from 22 kg that was previously estimated.
- The literature projects increasing net exports from China, Latin America and the Caribbean and declines for the rest of Asia and North America. Sardines, herrings and anchovies were the species most produced followed by tunas, bonitos and billfishes. World mollusks production averaged 14.9 million tonnes and was dominated by China followed by Japan. Salmon, trouts and smelts averaged 2.4 million tonnes in the same year. Leading producers were Norway (19%), USA (16%) and Chile (15%).
- World production of shrimps and prawns averaged 4.1 million tonnes over the period 1999-01; leading producers were China, India, Indonesia. The Black Tiger shrimp was the major specie farmed. Other species farmed include the Pacific White and the Chinese White.
- Tunas, bonitos and billfishes production averaged 6.0 million tonnes. The major producers were China, Indonesia and Japan. With respect to crustaceans, world production averaged 8.0 tonnes with China being the major producer followed by India and Indonesia in that order.

VIII. Treaties and International Trade Agreements

- There are three major treaties and arrangements that impact on the global and regional fishery sectors – the UNCLOS II, the FAO Code of Conduct for Responsible Fishing and CITES.
- The Law of the Sea came into force in 1994, recognizing the sovereignty of all States and promotes the peaceful uses of the high seas. It also stresses the equitable and efficient utilization and conservation of these resources. It adopts the principle that the area of the seabed and the ocean floor are the common heritage of mankind. This Law provides the basis for the establishment of the EEZ.
- The FAO Code of Conduct for Responsible Fishing was adopted in 1995 and highlights appropriate management practices for the exploitation of fish resources. The code also seeks to ensure consumer rights to safe, wholesome and unadulterated fish products. It stresses conservation and the utilization of by-catch.

- CITES seeks to prevent depletion and possible extinction of biological resources including fisheries. It seeks to limit the trade in endangered species as the main tool to effect such a strategy.

- **The WTO:** The WTO agreement and the respective trade agreements contained therein is the premier membership institution that guide global trade. Participating members are expected to eliminate trade distorting practices by way of successive rounds of agreements. Subsidies and other trade distorting practices including TBT, non-technical barriers to trade such as licensing and negative lists are to be rationalized. With respect to fisheries, there is an agreement among 140 nations to include fisheries policies on the "WTO 2" agenda. Some of the arguments advanced, include trade distorting role of subsidies, the impact of governments and their ability to regulate its own fishery, the negative impact of over-fishing, the impact on small itinerant fishers, their open access and freedom to exploit fishery resources in the EEZ's of various countries by foreign investors. These factors, it is believed, will lead to rapid depletion of fishery resources in countries such as those in the Caribbean. The possible surge in imports and other seafood products into the domestic market is likely to threaten market share of local fishers and itinerant traders who mostly land by-catch for domestic consumption. Concerns for the domination of multinational firms over small powerless states in the Caribbean have also been expressed.

- **The FTAA:** The FTAA trade block which includes 34 countries (excluding Cuba) was conceived at the Second Summit of the Americas in Miami, USA in 1994 and Negotiations began four years later. It showed in the main, that WTO compliance and its operations should reflect the difference in the levels of development and size of constituent members. Negotiations should lead to improvements in the working conditions of people and protection for the environment.

  The agreement calls for the elimination of agricultural export subsidies that serve to distort trade. Although it has not yet come into force, several issues have already been raised. These include reservations by governments of their rights to impose performance requirements on investors. In the main, questions on food and nutrition security, equity in treatment for all investors (local or foreign) the proposed policy to limit fisheries to local citizens and restrictions on foreign investors with respect to ownership of domestic facilities and plants have been raised.

- **The CSME:** The CMSE comprising a market of about 14 million people, is a regional trade block which allows for the complete waiver of import duties on all CARICOM produced

goods, while a CET is imposed on goods from third countries. It is carded to come on stream in 2005. It is expected to provide opportunities to boost regional trade and strengthen regional alliances in the treatment of business services. Although yet to function, reservations have also been expressed e.g., the threat to stability in certain economies, the impact of adverse macroeconomic policies on certain countries and the provision of free access to specified human resources through the one-way flow of both people and capital.

- **Other Trade Agreements:** CARICOM countries are also signatories to both unilateral and bilateral agreements with the major ones being the EU, Cuba, Costa Rica, Venezuela, the Dominican Republic and Colombia. The CARIBCAN and CBI arrangements also fall into this category. These arrangements set out specific conditionalities under which a free trade regime will be applied to selected goods and services, including fisheries.

  There are however, exclusion clauses in some cases, for example, the CARICOM agreement with the Dominican Republic grants rates of duty for specified groups of commodities excluding fishery products. In the case of the Cuban agreement, this has not yet become operational as some countries are still awaiting Cabinet approval.

IX. Trade Policy and Implications

- The major elements of trade policy is the application of various forms of tariffs on goods and services imported and exported and at the operational level, these can be considered multifunctional in nature. In the main, they are used to stimulate and/or facilitate trade among countries. They are also used to buttress revenue levels in certain countries. The WTO commitment on tariff require that its members, when applying tariff levels, should not exceed the maximum bound rates.

- The EU applies a General System of Preferences to developing countries to boost export earnings, stimulate industrialization and increase rates of growth. However, once a developing country has graduated to developed-country status, such preferences are no longer granted (the case of Thailand which lost benefits because of graduation). Currently, non-ACP countries benefit from a margin of preference under the Cotonou agreement. Non-ACP fisheries exporters of canned tuna faces a 22% import tariff, fish fillets 18% and 15% for some species, and around 12% for shrimp and prawns. These are likely to be removed if fishery arrives successfully on the WTO table. Thus ACP exporters will have to compete with non-ACP exporters at prices that are 12%-22% lower. This reduction in the margin has

implications for both profitability of investments and the relative competitiveness of ACP suppliers.

- Similarly, the implications for the Caribbean Region can be far reaching if domestic import tariffs (when applied) are rapidly lowered (also a consequence of the WTO). We should not forget the unprecedented disruption in the livelihood of banana and sugar exporting countries of the Region. Given the disadvantaged position faced by Caribbean negotiators, this situation makes it virtually impossible to successfully argue the case for (i) the exclusion of the fishery sector from the negotiating table and (ii) the argument for special treatment under the WTO protocol.

  If the cluster of "tariffs" are lowered in certain CARICOM countries, significant revenues will be lost. Alternatively, the potential surge in imports and the resultant increase in the availability of fish and fish products in the short run; in the longer term the impact can be more far reaching. It is possible that the domestic market share would be challenged from the possible increase of the flow of fishery products in the Region thus leading to perhaps unprecedented decreases in the local fish supply in the marketplace. Such was the experience of Sri Lanka. The consequent loss of profitability would likely drive away current and future investments in the sector and subsequent loss of employment and livelihood to those individuals and communities that depend on fishery for survival.

- This we argue will weaken the postulation that the sector could provide an additional platform for the Region's development thus reducing the burden on land based resources. Given the lack of investment opportunities in other sectors of the regional economy, it is likely that this capital may be directed elsewhere. High technology, capital intensive foreign fleets are likely to seize these opportunities and thus will crowd out those local investors who could possibly withstand the competitive challenges that are likely to develop.

- Fish and fishery products produced currently in the Region enjoy relatively free movement between CARICOM member states. The Common External Tariff (CET) is used to guide trade among constituent members of the PTA. In many of the thirteen member countries, the tax regimes cater for additional charges on the movement of fish products. These include consumption tax, customer surcharge and value added tax (VAT). Environmental tax, stamp duty and licensing also fall into this category.

- The trade policy regime in CARICOM states also provides for some incentive and support for the fishing effort. Some of these are currently viewed as 'subsidies' and deemed trade

distorting. There have been calls for their removal even before the commodity is placed squarely on the WTO negotiating table. Some subsidies are deemed cost recovery, and others are income and price supporting.

- Technological developments have also entered the discussions on the fishery sector in terms of expansion in capacity and other infrastructure. Technical barriers are also used in the administration of non-tariff policies to expand trade opportunities. These include health and food safety regulations as well as agreements on sanitary and phytosanitary procedures. They set the standards for trade including labeling and are aimed at protecting human health.

- Certification processes are also set in the regulations. Processors and exporters of fish products are required to be HACCP compliant. This has resulted in the need for local exporters to re-engineer and modernize machinery, equipment and plant which has impacted negatively on cost of operations. The exporters must seek approval prior to the arrival of fish products into the EU market.

- Exporters of seafood into the USA are subject to regulations specified under the Bioterrorism Preparedness Act. Canadian importers of fish products are also subjected to specific food and health regulations. Japan also conducts its affairs in a similar manner.

- It must also be noted here too, that although there is a tendency towards classifying the health and food safety regulations as non-tariff barriers to trade, we must stress the additional benefits to be derived from such requirements in protecting human health. This benefit should not be underestimated. Further, compliance forces the Region to upgrade and modernize its food supply system.

X. CARICOM Fishery

- **CARICOM Fish Production and Trade:** CARICOM total fish catch averaged about 191,000 tonnes during 1990-91 and was dominated by marine fish -- the pelagic group, and demersal. Crustaceans, mollusks and cephalopods were the other major species produced during that period. Production was concentrated in Guyana, St. Vincent (preliminary), The Bahamas and Belize.

- The major exporters in the Region in value terms are The Bahamas, Suriname, Belize and Guyana were dominated by crustaceans, fresh, chilled, frozen. The Caribbean is also a major exporter of mollusks but these exports only constitute less than 10% share of total world catch.

- Tariff regime are discussed in detail in Chapter 4 and further elaborated in Chapter 7.
- **Management of the Fishery Resource**: the exploitation of fishery in the Region is characterized by a wide range of management systems. In a number of cases, the management and administration was located within the Ministries responsible for Agriculture and because of this, there is widespread feeling that the fishery sector is suffering from underdevelopment as the case of the Regions agriculture. Hemorrhaging of staff, under financing, multiple and overlapping functions and responsibilities such as drug interdiction tied to fishery surveillance, inadequate surveillance and monitoring resources/equipment' all exert a negative impact on the sector.
- Some countries in the Region are well endowed with both technical and managerial aspects of the fishery while others are deficient. Secondment and/or brief attachment of staff under exchange programmes would correct this imbalance until local capacity is built up. Belize and Suriname for example appear to have built up this capacity and may be willing to share their expertise with other countries with interest in fishery on a temporary basis.
- We also reported a bias of technical resource in the area of fishery biology. While this may provide the foundation for technical capacity, we believe that fishery technicians should be exposed to other areas of training in, for example, economics, trade policy and negotiation, strategy, business management, marketing and product development. This we believe will also enhance our call for expansion of the 'commercial basket' to include greater utilization of by-catch of existing species as well as those that are underexploited.
- **State of Preparedness:** The fishery sector was observed to be in varying states of technical readiness to deal with issues of globalization. Some private sector initiatives in certain countries were fairly advanced in terms of HACCP and SPS component. Significant strides were made in the public sector through upgrade of legislations but certification capabilities were proceeding at a slower pace.
- **Strategic Plan:** There appears to be absence of an overarching strategic plan for the development and exploitation of the Region's fishing resource. Focus is placed on individual fishing grounds and specific species such as the Pedro Banks in Jamaica and the Barrier Reef in Belize; grouper and conch in The Bahamas; conch in Jamaica; prawns in Guyana and Suriname.

- **Landing Sites**: The Landing Sites examined include some of the major locations at which fishery harvests were brought onshore. On these visits, we were accompanied by technical officers from the Departments of Fisheries.

Table 1: Landing Sites visited in various Countries

Jamaica	Guyana	The Bahamas	Belize	Suriname
• Grenwich Farm, Kingston Wharf • Rae Town • Port Royal	• Various Sites at Georgetown and Houston • New Mahaicony • Rosignol • Better Hope	• Nassau Bay – various sites • Manmade estuarine at the west of New Providence Island	• The Belize National Fishermen Co-operative • Various landing sites on the Belize Rver at Belize City	• Sail • Nieuw Amsterdam • (various sites)

In general, there were distinct qualitative and functional differences in the infrastructure at these landing sites, some of which would make it difficult for fish supplies to meet required health and food safety standards in the market place. This problem is further exacerbated when the landing sites are used for the conduct of a wide range of 'other social activities'. The open access to these facilities by human, animals and itinerant traders (wholesale, retail) as well as the other economic activities (food and drug retail) and dry docking may have added to the management difficulties. The indiscriminate disposal of fishery waste, the poor levels of sanitation at the landing sites, the unpaved surrounding areas and the encroachment of non-fishery waste have served to further impair the environment.

Alternatively, some of the multifunctional jetties such as those in The Bahamas which are used for tourism, intra-coastal transport and commercial food distribution were found to be much more developed and of a much higher quality than the single-use facilities. Perhaps the Bahamian model could be used to set the standard.

- **Standard Operating Procedures (landing sites):** Where strong fishing cooperatives exist such as those in Belize and Guyana, upgrading of certain facilities have been undertaken partially by these organizations with some assistance from external sources. It is also evident that where there is the presence of a multinational link with the local fishery, the infrastructure is more developed and maintained.
- However, from our discussions with operators at the landing sites, it was found that there was a general lack of sanitary standardoperating procedures for the efficient management of the landing sites. This may have contributed to the poor and unsanitary facilities that exist at

some sites. Further, public sector responsibility for upgrading and management of the sites has not kept pace with the regulatory and legislative demands in the international marketplace.

- **Monitoring and Surveillance:** The capacity to accurately monitor activities in the fishery varies considerably across the Region. It is common knowledge that the Region's fishery resources are being exploited by foreign fleets (alleged poaching by countries such as British Honduras of the Jamaican fishery; Dominican Republic, USA, Cuba and yacht operators, the latter under the guise of recreation in The Bahamas fishery; French Guyana and Guyana in the Suriname fishery). These activities together with inter-fleet transactions on the high seas make it difficult to collect accurate data on the fishery resource. Use of such data can lead to inaccurate computations of sustainable yields as well as the level of monitoring and surveillance required.

- **Subsidies and Incentives:** The structure of the fisheries is very much akin to what exists in agriculture. There is a large number of small low-technology exploiters at the bottom end of the scale and a small number of high technology, capital intensive operators at the top. Attempts to obtain detailed cost of the fishing effort in each case were unsuccessful. However, our discussion revealed high levels of income being generated at the top end of the scale where the activities are highly integrated. This situation in certain countries, has led to the suspension of the "perceived subsidies" to fishery exploiters as in The Bahamas. In other countries, the request for subsidy seems critical to the fishing effort.

  Our discussions reveal that there have been continuous requests for a review of the existing incentive / support regime provided to the sector. However, we note that the majority of these provisions apply to the harvesting and production end of the fishery and very little at the value added segment of the supply chain. Our request for crude estimates of the overall impact of the subsidy with respect of the over-exploitation of the resource remains indeterminate. There is also an apparent lack of clarity of the role and function of an efficient subsidy support regime for fishers in the Caribbean.

- **The WTO and Fisheries:** There was indeed a general awareness that fisheries is now present on the WTO table due to discussions among technicians in some centres. However, there is the need for more thorough analysis on the critical issues being raised in the literature. Further, stakeholders have expressed reservations to the possible unrestricted opening of the Region's fishery resource as foreign exploitation and domination that could lead to frustration of the Regions effort towards self-development through full utilization of its own resource

endowment. It is recognized that the land-based resources is inadequate to sustain the development initiatives of the Region; sea-based resources must therefore play a more strategic role in the provision of food and nutrition security.

- **Food and Nutrition Security:** Our efforts to accurately quantify the contribution of the fishery resource to GDP remain incomplete, largely due to weaknesses in the database. However, the contribution of the fishery resource to development in the Region, particularly to levels of self employment, income generation and accumulation of wealth as well as contribution to food and nutrition security should not go unrecognized.

XI. STRATEGIES AND PROJECTS

The strategies and projects designed to address issues that are likely to constrain fisheries development in CARICOM include:

(i) the re-engineering upgrading / transformation and modernization of the landing sites currently in use;
(ii) a comprehensive assessment of the stock of fishery resource that lies within the EEZs and beyond;
(iii) a full assessment of the contribution of the Region's Fishery resource to its food and nutrition security;
(iv) change in the institutional arrangements currently used to manage the Regional fishery resource;
(v) evaluation of the role and contribution of subsidies and other forms of support provided by the State to the fishery sector;
(vi) a comprehensive assessment of the WTO and other trade agreements and implications for fishery development in the Region.

Six project areas have been identified and presented in Table 2. In each case, strategic objectives have been identified together with Priority Locations.

Additional recommendations include:

- Publication of a quarterly newsletter/Fishery Review
- Technical exchange programme among fishing countries

Table 2: Summary of Project Proposal

	Project Area	Strategic Objectives	Priority Location
1	Upgrade and transformation of landing sites	HACCP/SPS Compliant Sanitary Standard Operating Procedures	Jamaica Guyana Suriname Belize
2	Fishery Resource Stock Assessment	Assessment of current stock levels Projection of Supply (20 years)	All CARICOM / CARIFORUM Countries
3	Contribution of Fishery Resource to Food & Nutrition Security	Per capita Consumption of fish and fish products Relative Contribution of fish and fish products / other meats	All CARICOM / CARIFORUM Countries
4	Review of Institutional Arrangements/Coordinating Mechanisms for fishery	Development of autonomous mechanism for fishery management	All CARICOM / CARIFORUM Countries
5	Review/Evaluation of Role and Contribution of Subsidy and Other support to the fishery sector	Rationalization of incentives, subsidies and other support	All CARICOM / CARIFORUM Countries (Ministry of Finance)
6	WTO and Fisheries	Potential impact of WTO agreements on fishery exploitation Impact of other related conventions and agreements/arrangements on the Region's fishery exploitation	All CARICOM / CARIFORUM Countries

PART A

Chapter 1
Introduction and Background

This study was conducted within the broad framework of the fisheries component of the Integrated Caribbean Regional Agricultural and Fisheries Development (ICRAFD) Programme. The main objective of this programme is to extend the activities of the CARICOM Fisheries Resource Assessment and Management Programme (CFRAMP) to include The Bahamas, Suriname, Dominican Republic and Haiti to ensure their integration into the regional initiative in order to improve the sustainable development and utilization of the fishery resources of the Region. The project will also extend benefits in fishery surveillance and enforcement, marketing, processing and training to all CARIFORUM countries that have already benefited under the CIDA supported CFRAMP projects.

The role that international trade plays in the fisheries sector globally, is a very important one as some 40% of the total world production of fish and fish products valued at $US52 billion entered international trade in 1996 and is as constantly increasing. Regional and international markets for fish and fish products are becoming more and more integrated therefore the ability of developing countries to trade in these products is becoming more and more important for the performance of the fisheries sector. A large number of CARIFORUM/CARICOM countries rely on the fisheries sector to generate employment, income, foreign exchange and other benefits. As such they would need to closely monitor the move towards increased trade liberalization taking place at the level of the WTO, FTAA and other forums as well as identify the opportunities and threats to the development of fisheries in the Region.

In order to fully appreciate the situation on globalization and its likely effect on fisheries development in the Region, the trade in fish and fishery products, regionally and internationally, the CRFM Secretariat commissioned this study to:

> "review the current situation and identify the critical issues in such areas as fisheries, trade policy development and implementation, tariff and non-tariff barriers, quality

assurances and safety standards and eco-labeling that could affect the development of the fisheries sector in the CARIFORUM/CARICOM Region as well as the Region's capacity to trade. The study will recognize existing international fishing agreements, e.g., UNCLOS II and the FAO Code of Conduct for Responsible Fishing. Also it will look at the increasing influence of CITIES on the management and trade in certain species, e.g. conch. It will also propose a strategy and set out a project proposal to address the issues that constrain the development of the fisheries sector as well as restrict the Region's ability to influence current trade negotiations and the opportunities to benefit from the resulting trade liberalization agreements.

1.1 Objectives of the Consultancy

Three broad objectives were identified for the study:

(i) to review the situation regarding globalization and to identify critical issues that could affect the development of the fisheries sector in the CARIFORUM/CARICOM Region, to restrict the Region's ability to influence current trade negotiations and its opportunities to benefit from the resulting trade liberalization agreements

(ii) to improve the understanding of the economic, environmental and social effects of trade liberalization, and trade related policies including subsidies and to recommend trade policy reforms in order to contribute to sustainable fisheries development and management in the Region and

(iii) to define a strategy and project proposal to address issues that could hinder development of the fisheries sector as well as restrict the Region's ability to influence current trade negotiations and the opportunities to benefit from the resulting trade liberalization agreements

The many areas for examination in the study should include trade policies, economic integration and regulations, fishery management systems, fish production and the status of fishery resources. In addition, trade statistics for export and import of fish products, market intelligence, level of participation in the current regional and international trade negotiations including an appreciation of the issues that are likely to affect fisheries trade should also be addressed.

"Subsidies" and its role in fisheries development was suggested for special mention in terms of the following:

(a) the current nature and extent of subsidies and other forms of incentives provided by governments to the fisheries sector.

(b) identification and documentation of the nature and magnitude of the impact of subsidies on the sustainability of the fisheries resources including any relationship that may exist between subsidies, over-capacity and over-fishing and

(c) identify and document the nature and magnitude of subsidies and the trade in fish and fishery products

1.2 General Methodical Approaches to the Conduct of the Study

The methodical approach adopted in the conduct of the study comprise the following steps:

(i) a comprehensive review and interpretation of the specific terms of reference identified for the study

(ii) the conduct of field investigations in the major countries of interest: Jamaica, Guyana, Belize, The Bahamas and Suriname

(iii) development of a profile of the fish sector and exploitation levels, where data exist as well as production levels and trade flows, other country specific issues. (The absence of and limitations in the scope, quality and quantity of the data resulted in disproportionate treatment in the presentation of these profiles)

(iv) analysis and synthesis of the data and other information collected through desk research and review of published reports on the fisheries sector

(v) identification of factors that could constrain the development of the Regional fishery thus making the Region unable to benefit from the opportunities resulting from trade liberalization agreements. The study also highlights some of the risks that may arise from an ill-prepared entry into fishery trade negotiations.

1.3 Data Sources and Constraints

Data Sources:

(a) The results of this research on the fishery sector are based on data obtained from a number of sources. These include published reports, results of studies conducted on the Region's fishery, internet databases, conferences and workshop presentations, primary data from major stakeholders, regional fishery technicians, stakeholders including policy makers, itninerant fishermen, fishery organizations including cooperatives, private sector entrepreneurs, technocrats and other officials from the fishery administrative units.

(b) We deem these datasets to be a true representation of the current situation of the fishery. However, we wish to note the intersource discrepancies in the datasets, but they were not significant enough to distort the trends and developments observed in the sector. Given the importance of accurate data on areas such as resource management, revenues and costs and support to the sector, the Region may be advised to invest additional resources in improving the quality of the data on CARICOM fishery.

Constraints:

(a) Inadequate preparation and timely submission of data and other information that were requested at the country level. However some of these deficiencies were corrected during the field visits to the specific countries. Fishery staff members were able to fill these gaps, if only on a qualitative basis.

(b) Failure to obtain detailed information in the important area of subsidies we were unable to extract and unravel this information from official sources. There was a great deal of reluctance to provide this information which we believe was due to difficulties in separating subsidies from other forms of support provided to the sector.

(c) The brevity of the time allocated for the conduct of the field investigations and the lack of preparation at the country level to receive the research effort.

1.4 Organization and Structure of the Report

The report is presented in two parts: **Part A** constitutes the main report and **Part B** comprises profiles of the respective countries visited for the field investigations.

Part A contains seven chapters: Chapter 1 is the introduction. It sets out the background to the study, the terms of reference, the specific areas to be highlighted, objectives, the general methodological approach and constraints. It also includes details on the organizational structure of the report. Chapter 2 sets out an overview of the global fishery. Here we highlight data on production and trade flows, utilization and consumption levels as well as profile of major commercial species exploited. Fishery treaties, global trade agreements and preferential trade agreements are highlighted in Chapter 3. These include sequentially: UNCLOS, FAO Code of Conduct and CITES; WTO, FTAA, CSME and EU/ACP, Caribcan and CBI.

Chapter 4 reviews trade policy issues, other regulatory and specific market entry requirements, the issue of incentives and support including the subsidies and the WTO. The Chapter also includes a review of the infrastructure including landing sites and refrigeration facilities used in the food supply chain. Health and food safety issues specific to the export of fishery are set out in Chapter 5, SPS, HACCP and Bio-terrorism are also addressed.

In Chapter 6, an overview of CARICOM fishery is presented. Here we highlight profiles of production and trade, major exporters and importers, and a brief summary of policy mechanisms that guide trade in fishery in the Region. Chapter 7 is divided into two parts. The first part summarizes the major findings of the study. The second part outlines the specific project proposals to remove constraints to the development of the fishery; prepare fishery technicians for global negotiations on trade in fisheries and identify ways in which the Region can safeguard and benefit from global developments. We deem the second part of Chapter 7 important enough to elaborate on the contents of the project proposal. These elaborations are presented below in terms of the various components of the project.

Component one of the project proposal seeks to review, re-engineer and transform the **Landing Sites** currently in use. In the body of the document, we commented on the role they have been playing in fish supply both for the export and domestic markets, but in general they lack sanitation protocols to guide their efficient management. Many are in a state of disrepair,

reflecting poor maintenance levels. Compliance with acceptable sanitary standard operating procedures is out of line and represents immense threats to natural and international market shares. If the Region is to become competitive and gain increased market access, then such deficiencies must be addressed immediately. Once they are corrected, those facilities must be inspected constantly to ensure market compliance with recommend operating protocols.

The second component of the project proposal calls for a comprehensive assessment of the stock of fishery that resides in the Region i.e. on the continental shelf and those that resides within the respective EEZs. Such an assessment would provide information to guide exploitation investment decision regarding already commercialized species as well as effort to bring others into the commercial basket. Also it will help to diversify exploitation efforts, enhance the sustainability of member countries food reservoir as well as enrich the food bank. We recognised that these assessments are expensive activities, however, given the strategic importance of this information to the survival of this important resource which the Region is disproportionately sharing with unauthorised foreign exploiters, such investments are deemed warranted. We argued for acceleration of the initiatives in case the resource assessment process has already started.

In previous years, the Region's population was deemed deficient in meeting its protein requirements. Fishery resources represent an important source of this key nutrient. Its current status is unknown. However, we believe that increased access to fish products at affordable prices can remedy this situation if it still exists, and can prove feasible substitutes, thus reducing our dependence on imported meat products for this important nutrient. We argued that besides this particular function, fish serves as an important food reservoir and food bank waiting to be tapped especially in times of disaster that normally affects our land based food supply activities. **Assessment of the current contribution of fishery resources to food and nutrition security should thus be undertaken which will serve to provide a guide for national and regional resource allocation activities (Component three).**

If fishery resources are to be effectively exploited, developed and sustained, then the current institutional arrangement that guide fishery calls for upgrade and modernization. Given the current diverse nature of the overall management mechanism for this resource, we share the opinion held in many quarters that the survival of the sector would be better served if the business of fish and fishery resources would be guided by an independent autonomous unburdened

institution. Such an approach should be investigated and implemented where feasible (Component four).

A fifth component of the project proposal relates to "subsidies and other support" provided to the sector by many Caricom States. This issue is very complex given the current diverse interpretations and different approaches to subsidies being placed on the discussion table. Further its role and function is being questioned much the same way as it is applied to other commodities and sectors. There is a major concern with whether or not subsidies would lead to over exploitation of the fishery because of its effect on capacity cost of the fishing effort, as well as the threat to sustainability of the resource either specie, ground or both. Concern for its role in the distortion of trade in fish and fishery products is also a component of discussion. Because of this, there have been calls for its total removal from the WTO negotiation table. The fact is, fisher folks, especially the small, itinerant, resource poor, low technology ones have come to depend on some type of support to reduce the cost of their fishing effort, many are even seeking reviews for an increase in the current levels. **The issue was important enough to be placed firmly on the research table but this was examined in detail in this study.** Such an activity we believe should be undertaken by officers of the Ministries of Finance who have direct access to both the input data/information as well as the revenue that enters the Treasury from fishery activities. We need to point out that in at least one country, a decision has been taken to suspend the granting of support to the high end of the fishery because of the level of income derived from fishing efforts. The view is held that currently this segment of the fishery no longer needs this type of support.

The final component of the project proposal is enshrined in the workings of **trade liberalization agreements** and their potential impact on the fishery sector. Four issues are highlighted (a) health and food safety conditionalities for market access, (b) the formal "opening up" of the resource to foreign investment and exploitation, (c) the short and long term benefits to be derived and threats they pose to the fishery resources and (d) the need to resolve possible disputes between the WTO arrangements and those enshrined in specific agreements such as CITIES. These difficulties would manifest themselves where countries have either dual or multilateral representation in these conventions and would need to satisfy conditions/conditionalities for effective participation if they want to enjoy the benefit they all provide. The support for fisheries being placed squarely on the WTO discussion table requires considerable empirical analysis (where feasible) in order to quantify the likely long term benefits that are expected to accrue to the Region from the active participation in these protocols. Our research efforts did not throw much light on the subject, but

we feel that a more thorough and broader study would provide information to guide WTO negotiations on this important asset. The Region should be guided by experiences of past failures to invest in necessary research to guide decision makers at the WTO negotiation table. History should not be allowed to repeat itself twice.

Chapter 2

Overview of Global Fishery

This Chapter reviews the world fisheries situation specific to production, major fishing grounds, major world producers and trade. The major species harvested are determined as well as review of the processed/value-added products. Policies, Regulations, Incentives and Support are reviewed as well as key participants in Exploitation, Processing and Marketing. This approach is undertaken to create a reference datum for CARICOM.

FAO's total capture production data refer to the nominal catch of fish taken for commercial, industrial, recreational and subsistence purposes from marine, brackish, and inland waters. Harvests from aquaculture aquatic plants are also excluded from country totals. Total capture production includes: freshwater fish (carp, tilapias etc.), diadromous fish (river eels, salmon etc.), marine fish (flounders, cods, red fishes, tunas, mackerels, sharks etc.) crustaceans (lobster, shrimp etc.), mollusks (oyster, clams, squids etc.), aquatic mammals (whales etc.), miscellaneous aquatic animals (turtles, crocodiles etc.), and miscellaneous aquatic animal products (corals, sponges etc.).

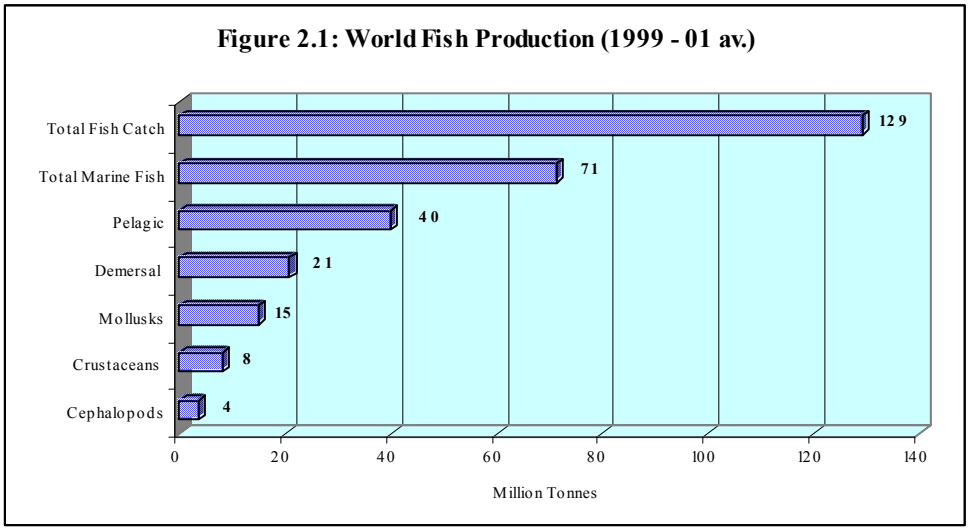
FAO classifies aquatic organisms according to approximately 1290 commercial species items, further arranged within the 50 groups of species constituting the nine divisions. The FAO International Standard Statistical Classification of Aquatic Animals and Plants (ISSCAAP) is presented in Annex 1.

2.1 Total World Fish Catch

Total world fish catch averaged 129 million tonnes during 1999-01, comprising of Pelagic[1] (40 million tonnes), fresh water Diadrom[2] (31 million tonnes), Demersals[3] (21 million tonnes). From

[1] **Pelagic** - Fish and animals that live in the open sea, away from the sea bottom.
[2] **Diadromous** - A species / fish which undertakes spawning migration from ocean to river or vice versa.
[3] **Demersal** - Living in close relation with the bottom and depending on it. Example: Cods, Groupers and lobsters are demersal resources. The term "demersal fish" usually refers to the living mode of the adult.

these groups Mollusks[4] (excluding cephalopods) production was 15 million tonnes followed by Crustaceans[5] (8 million tonnes) and Cephalopods[6] (4 million tonnes) see Figure 2.1.



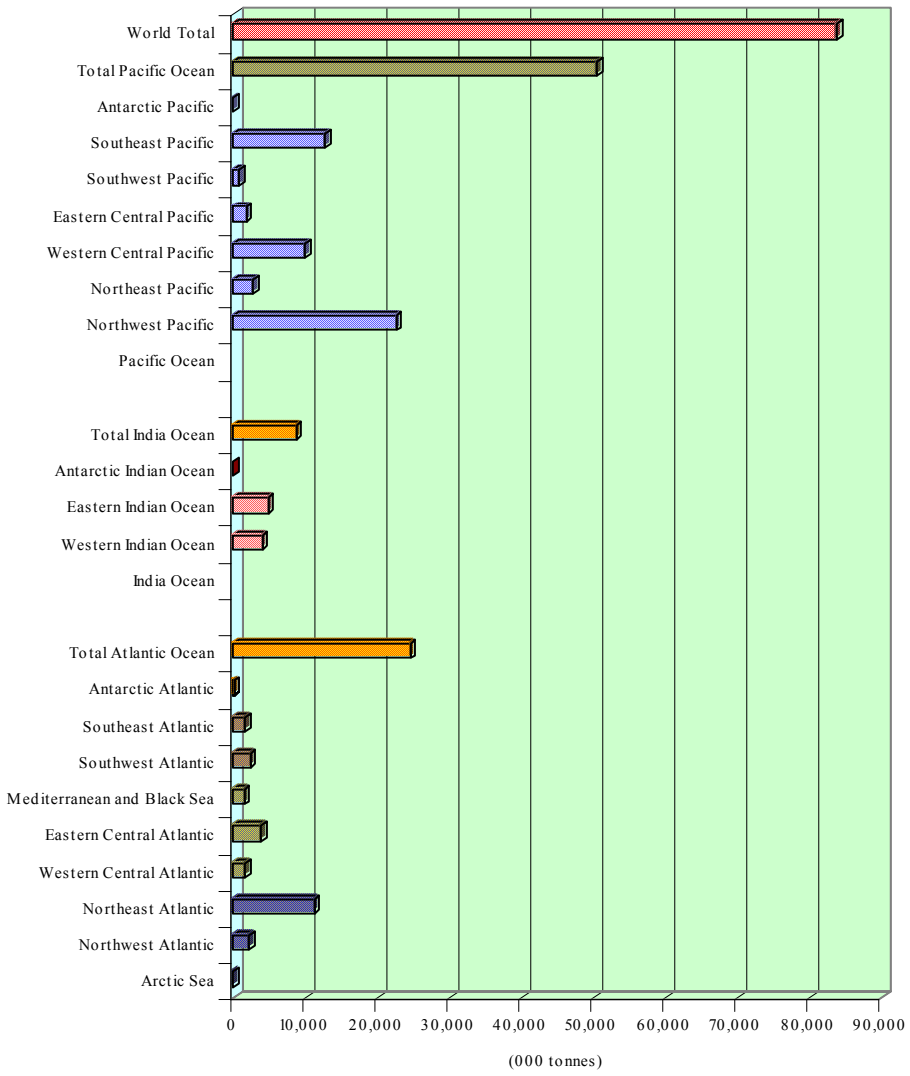
Data Source: FAOStat Database

2.2 Major Fishing Grounds

The Pacific Ocean recorded the highest production / harvest, followed by the Atlantic and Indian oceans, respectively. Within the Pacific Ocean, the Northwest Pacific region was the most prolific followed by the Southeast Pacific and Western Central Pacific. In the Atlantic Ocean, the Northeast Atlantic showed the highest production followed by the Eastern Central Pacific, see Figure 2.2.

[4] **Mollusk** - A group of freshwater and saltwater animals with no skeleton and usually one or two hard shells made of calcium carbonate. Includes the oyster, clam, mussel, snail, conch, scallop, squid, and octopus.
[5] **Crustacean** - A group of freshwater and saltwater animals having no backbone, with jointed legs and a hard shell made of chitin. Includes shrimp, crabs, lobsters, and crayfish.
[6] **Cephalopods** - Animals (mollusks) with tentacles converging at the head, around the mouth (examples: squids, cuttlefish, and octopus).

Figure 2.2: World Marine Fishing Areas - Production

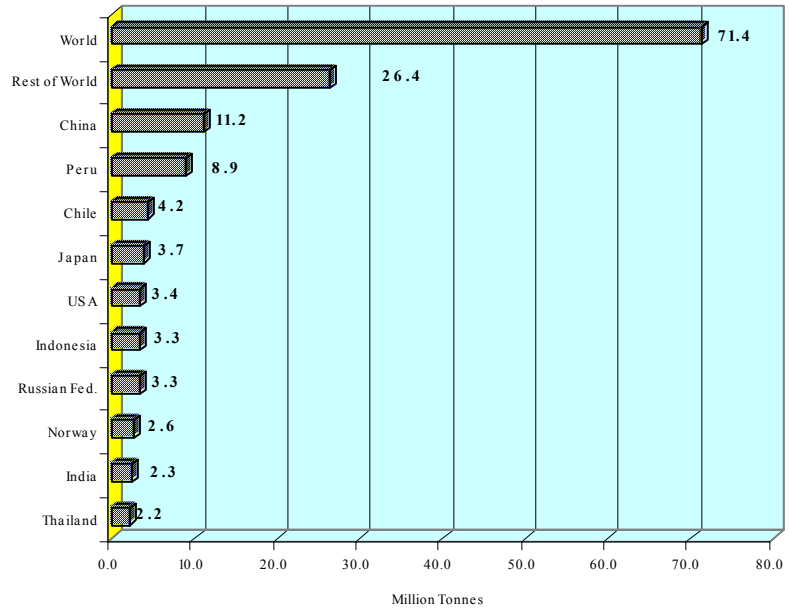


Data Source: FAOStat Database

2.3 Major World Producers

Total marine fish production averaged 71.4 million tonnes during the period 1999-01. China produced 16% of world production, followed by Peru (12%), Chile (6%) and the other major producers averaged less than 5%. Rest of the World countries produced 36% of total production. The volumes of fish produced by various countries are presented in Figure 2.3.

Figure 2.3: Total Marine Fish Production
Major World Producers (1999-01 Av.)

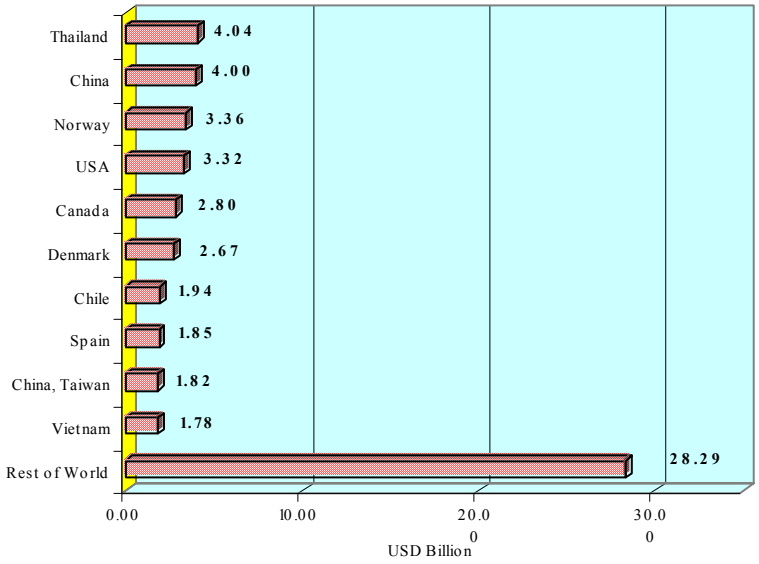


Data Source: FAOStat Database

2.4 Major Exporters and Importers

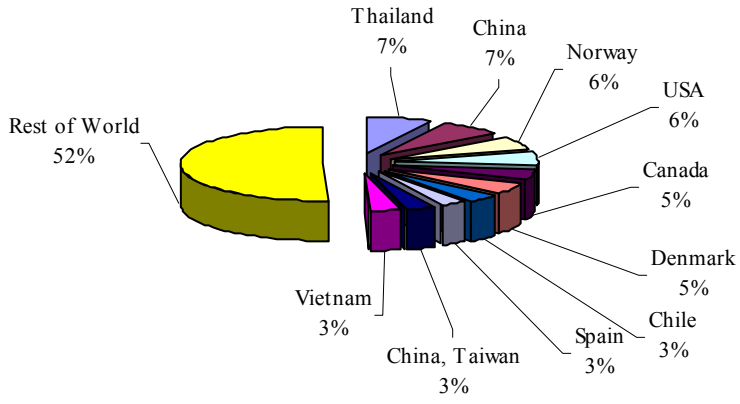
Global exports have displayed an increasing trend (99-01); from USD 52.7 bn in 1999, USD 55.23 bn in 2000 and USD 55.87 bn in 2001. The leading world exporters were Thailand, China, Norway, USA, Canada, Denmark, Chile, Spain, China-Taiwan and Vietnam. Thailand and China each exported 7% or USD 4.0 bn of total, followed by Norway and USA at 6% or USD 3.3 bn each. The Rest of World exported 52% or USD 28.3 bn or 52% of total (Figures 2.4 and 2.5).

Figure 2.4: Global Fishery Exports - 2001



Data Source: FAOStat Database

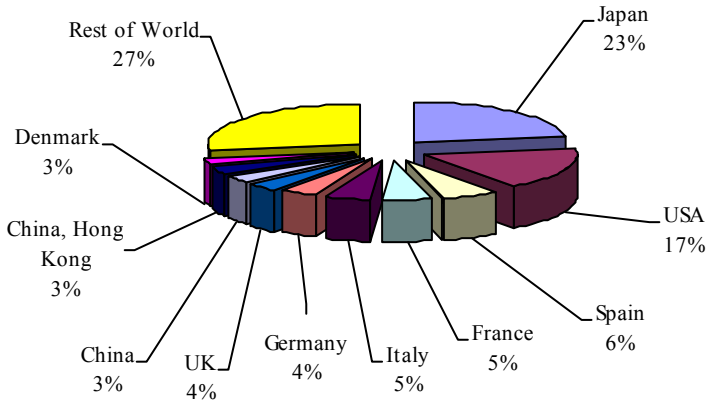
Figure 2.5: Global Fishery Exports 2001



Data Source: FAOStat Database

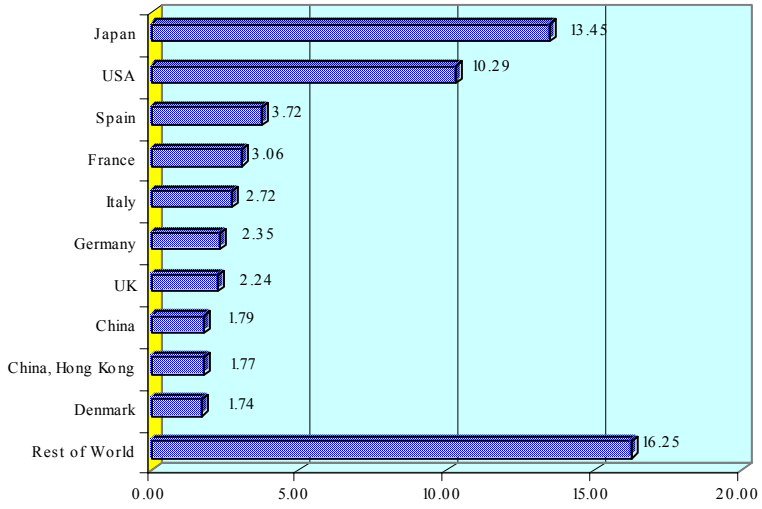
Global imports in 2001 were valued at USD 59.40 bn. The leading importing countries were Japan, USA, Spain, France, Italy, Germany, UK, China, China-Hong Kong, Denmark. Japan was the world largest importer (23% or USD 13.45 bn) followed by the USA (17% of USD 10.9 bn), Spain (6% or USD 3.72 bn), France (5% or USD 3.06 bn), Italy (5% USD 2.72 bn). The other leading importing countries were less than 5% while the Rest of World imports were 27% or USD 16.25 bn (Figures 2.6 and 2.7).

Figure 2.6: Major Global Fishery Import Share - 2001



Data Source: FAOStat Database

Figure 2.7: Major Fishery Import Volumes - 2001



Data Source: FAOStat Database

2.5 Trade Flows and Products

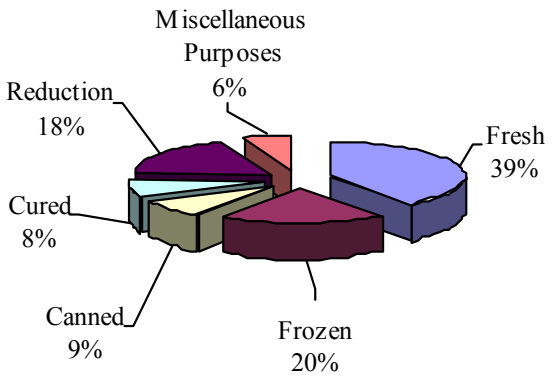
2.5.1 Trade Flows

2.5.1.1 Fish Utilization

An estimated 39% or 51.7 million tonnes of fish produced globally in 2001 was marketed fresh, targeted for human consumption. Further, 20% was marketed frozen, 9% canned and 8% cured. The remaining 24% was utilized for reduction -- processing into meal and oil (18%) and miscellaneous purposes (6%), see Figure 2.8 and Table 2.1. There was an increasing trend towards marketing for direct human consumption from 69.7% of total catch in 1992 to 76% in 2001, with a commensurate reduction in production, targeted for processing which declined from 25.3% to 18.2% over the same period.

From the total fishery production targeted for human consumption, 52.3% was marketed fresh, 25.9% frozen, 10.6% cured and 11.2% canned. Further, from that portion targeted for processing, 75.8% was processed into oils and meals, and 24.2% for miscellaneous purposes.

Figure 2.8: World Fish Utilization (2001)



Data Source: FAOStat Database

Table 2.1: World Fish Utilization (2001)

Utilization of World Fishery Production	Quantity (Million tonnes)
Fresh	51.741
Frozen	25.649
Canned	11.104
Cured	10.449
Reduction	23.707
Miscellaneous purposes	7.557
Total	**130.207**

Data Source: FAOStat Database

2.5.1.2: Fish Consumption

Global annual per capita consumption of fish was predicted to increase from 16 kg in 2000 to between 19 and 21 kg (live weight equivalent) in 2030. Consumption per capita was projected to increase in South Asia 60%, Latin America and the Caribbean 50% and China >84%, forecasted as the top three growth regions in the world. Stagnation or decline was predicted for: Africa 3%,

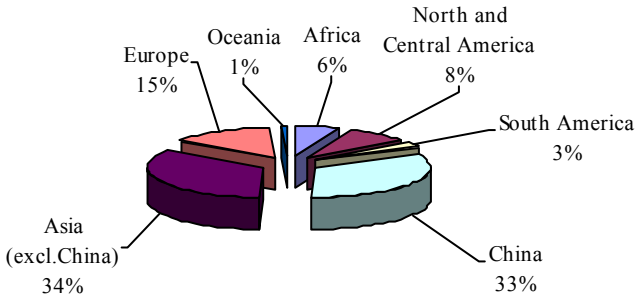
the Near East in Asia 17%, Oceania developing 8%, and the countries of the former USSR 4%. Non-food use of fish was projected to decline.

Recent FAO studies indicate an average world per capita consumption of 19 to 21 kg. Human intake of animal protein from fish, crustaceans and mollusks increased from 13.7% in 1961 to 16.1% in 1996 and then declined to 15.8% in 1999.

Consumption in industrialized countries increased from 13.2 million tonnes in 1961 to 25.4 million tonnes in 1999, reflecting a rise in per capita supply from 19.9 to 28.3 kg. This increase was evident until the late 1980s and has since stabilized.

The major consuming regions in the world are Asia (excluding China) 34%, China 33%, Europe 15% and North and Central America 8% (Figure 2.9).

Figure 2.9: Total Fish Consumption in Various Regions (2002)



Data Source: FAO <http://www.fao.org/docrep/005/y7300e/y7300e05.htm#P0_0 >

2.5.1.3 World Trade Flows

China, Latin America and the Caribbean were projected to show increasing net exports while declines are expected for the rest of Asia and the rest of North America.

Africa, the USA, Europe and Japan were projected to increase their net imports and Near East Asia was expected to switch from net importers to net exporters while South Asia was projected to switch from a net exporter to net importer.

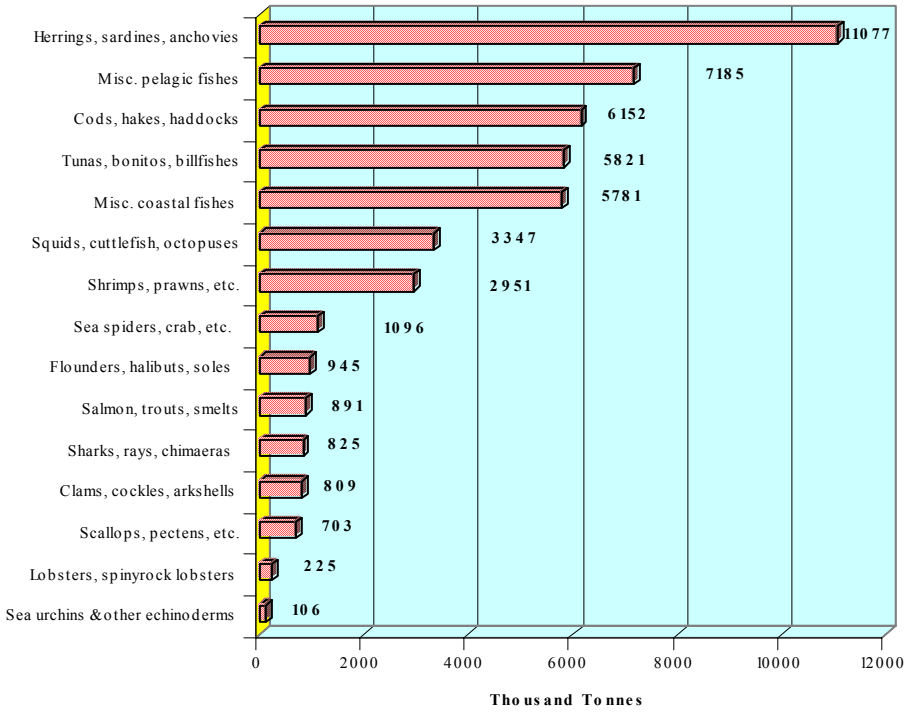
Japan imports represent 30 percent of world trade in fish products, while the estimated 370 million persons (of a total 480 mn) who live in EU member countries, make the EU an important importer of fish as Japan and the USA. Even though the USA's fisheries have to be managed to prevent over-fishing (as defined in United States legislation) and the stocks of most important commercial species in the United States are not considered as over-fished, their consumption in the future will be heavily influenced by global demand.

Developed nations import and consume high-value species while developing countries import low-value species as a source of protein. High-value product export from developing countries may serve as important sources of income.

2.5.2 Products

Total world fish catch was 130.4 million tonnes in 2001. The data for that year's catch show that herrings, sardines and anchovies were the most harvested / catched fish in the world estimated at 11.1 million tonnes. This is followed by tunas, bonitos and billfishes (5.8 million tonnes) while the least harvested / produced were sturgeons and paddlefishes (0.002 million tonnes), Figure 2.10. Fish for reduction processing was 24.2 million tonnes, Annex 2.

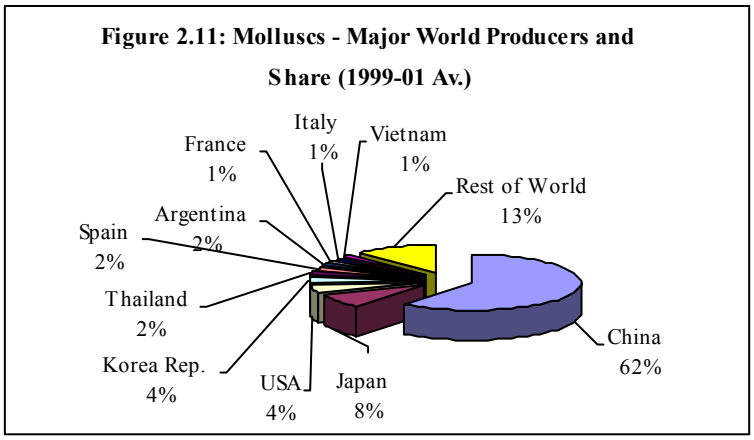
Figure 2.10: Major Fishery Species Harvested Excluding Aquaculture - World (2001)



Data Source: FAOStat Database

2.5.2.1 Mollusks

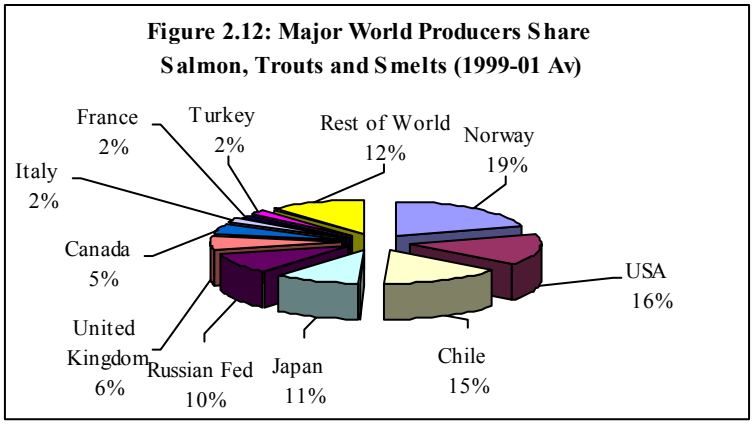
Mollusk refers to a group of freshwater and saltwater animals with no skeleton and usually one or two hard shells made of calcium carbonate. They include the oyster, clam, mussel, snail, conch, scallop, squid, and octopus. World mollusks production averaged 14.9 million tonnes. China is the world's major producer at 62% or 11 million tonnes followed by Japan at 8% or 1.5 million tonnes (see Figure 2.11).



Data Source: FAOStat Database

2.5.2.2 Salmon, Trouts and Smelts

World production of salmon, trouts and smelts averaged 2.4 million tonnes. Norway is the world's major producer at 19% or 11 million tonnes followed by the USA at 16% or 1.5 million tonnes and Chile at 15% or 0.4 million tonnes (see Figure 2.12).

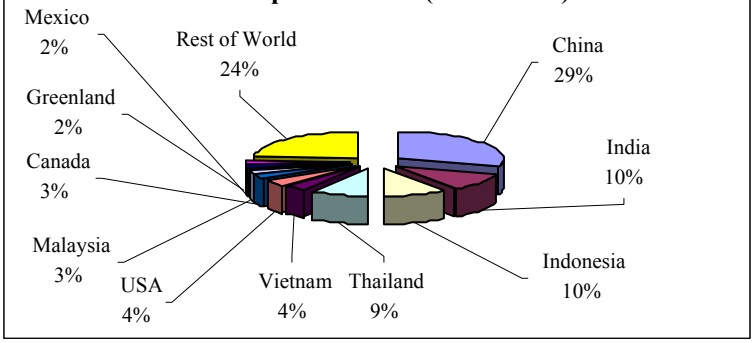


Data Source: FAOStat Database

2.5.2.3 Shrimp and Prawn

World shrimp and prawn production averaged 4.1 million tonnes. China is the world's major producer at 29% or 1.3 million tonnes, followed by India and Indonesia at 10 % or 0.4 million tonnes each (see Figure 2.13). Black Tiger comprises 56% of the world farmed shrimp. Other important cultivated species are Pacific White (20%) and Chinese White (6%). Pink shrimp dominates the marine catch, estimated at 80%. Thailand is the top exporter with 127,229 tonnes worth Baht 46,837.10 million in 1999. Nearly 75% of world shrimp production is imported by the USA and Japan.

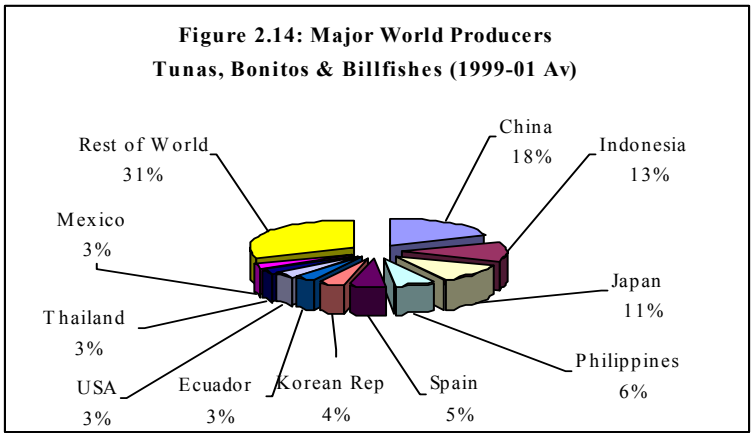
Figure 2.13: Major World Producters Shrimps & Prawns (1999-01 Av)



Data Source: FAOStat Database

2.5.2.4 Tunas, Bonitos and Billfishes

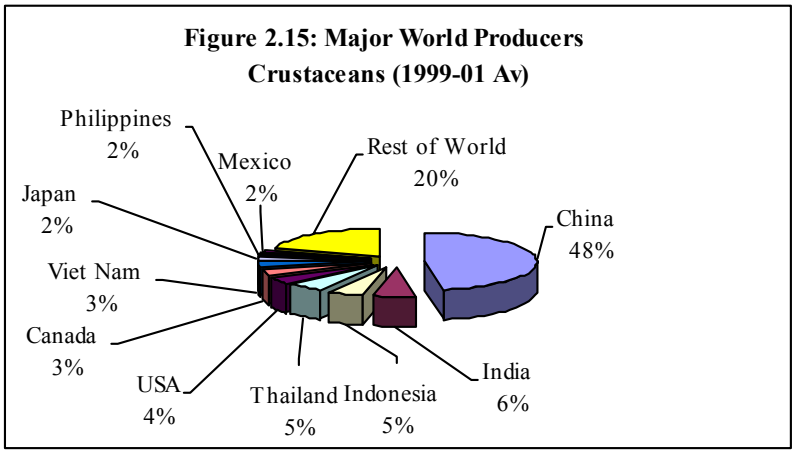
World tunas, bonitos and billfishes production averaged 6.0 million tonnes. China is the world's major producer at 18% or 1.1 million tonnes followed by Indonesia at 13% or 0.8 million tonnes and Japan at 11% or 0.7 million tonnes (see Figure 2.14).



Data Source: FAOStat Database

2.5.2.5 Crustaceans

World crustaceans' production averaged 8.0 million tonnes. China is the world's major producer at 48% or 4.1 million tonnes followed by India at 6% or 0.5 million tonnes and Indonesia at 5% or 0.4 million tonnes (see Figure 2.15).



Data Source: FAOStat Database

Chapter 3
Treaties and Trade Agreements

This Chapter reviews the treaties and trade agreements that impact on the fisheries sector. Section A reviews the United Nations Convention on the Law of the Sea and its main tenets are highlighted. This is followed by a review of the FAO Code of Conduct for Responsible Fisheries and then the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) agreement is reviewed and discussed.

Section B reviews the three major trade agreements that impact on CARICOM. First we review the WTO agreement that impact on trade on most countries, globally. This is followed by the FTAA agreement projected to start in 2005. Almost all countries in the western hemisphere are expected join this PTA grouping. Next we review the CSME, which is a regional economic initiative of CARICOM member countries. This is followed by Section C which briefly reviews the major unilateral and bilateral agreements to which some CARICOM countries are signatory.

Section A
Fishery Treaties

3.1 United Nations Convention on the Law of the Sea

The United Nations Convention on the Law of the Sea (UNCLOS) was signed in Montego Bay, Jamaica, December 10, 1982 and came into force on November 16, 1994. The agreement recognizes the sovereignty of all States and through legal order, facilitates international communication and promotes the peaceful uses of the seas and oceans. It also addresses the equitable and efficient utilization of its resources, conservation of the living resources and allows for study, protection and preservation of the marine environment. The Convention seeks to develop the principle that **the area of the sea-bed and ocean floor are beyond the limits of national jurisdiction and are the common heritage of mankind**. Thus, exploration and exploitation of this common area shall be carried out for the benefit of mankind as a whole, irrespective of the geographical location of States.

As set out in the agreement, the Exclusive Economic Zone (EEZ) extends to a maximum of 200 nautical miles and its existence depends upon an actual claim[7]. The coastal state has sovereign rights within the EEZ. This is also the area within which an estimated 90 per cent of living marine resources are caught. The high seas are open to all States for navigation and fishing, whether coastal or land-locked. Box 3.1 comprises selected excerpts of the UNCLOS agreement that are referred to in this study to this study.

[7] More than 100 coastal States (out of ~140) claimed an exclusive economic zone

UNITED NATIONS CONVENTION ON THE LAW OF THE SEA

Box 3.1

SECTION 2: CONSERVATION AND MANAGEMENT OF THE LIVING RESOURCES OF THE HIGH SEAS

Article 116: Refers to the right to fish on the high seas. The Article states that all States have the right for their nationals to engage in fishing on the high seas subject to: (a) their treaty obligations; (b) the rights and duties as well as the interests of coastal States provided for, inter alia, in article 63, paragraph 2, and articles 64 to 67; and (c) the provisions of this section.

Article 117: … all States have the duty to take or to co-operate with other States in taking such measures for their respective nationals as may be necessary for the conservation of the living resources of the high seas.

Article 118 … all States shall co-operate with each other in the conservation and management of living resources in the areas of the high seas. States whose nationals exploit identical living resources or different living resources in the same area shall enter into negotiations with a view to taking the measures necessary for the conservation of the living resources concerned. They shall as appropriate, cooperate to establish subregional or regional fisheries organizations to this end.

Article 119 Conservation of the living resources of the high seas:
(1) in determining the allowable catch and establishing other conservation measures for the living resources in the high seas, States shall:

(a) take measures which are designed on the best scientific evidence available to the States concerned, to maintain or restore populations of harvested species at levels which can produce the maximum sustainable yield, as qualified by relevant environmental and economic factors, including the special requirements of developing States, and taking into account fishing patterns, the interdependence of stocks and any generally recommended international minimum standards, whether subregional, regional or global;

(b) take into consideration the effects on species associated with or dependent upon harvested species with a view to maintaining or restoring populations of such associated or dependent species above levels at which their reproduction may become seriously threatened.

(2) Available scientific information, catch and fishing effort statistics, and other data relevant to the conservation of fish stocks shall be contributed and exchanged on a regular basis through competent international organizations, whether subregional, regional or global, where appropriate and with participation by all States concerned.

(3) States concerned shall ensure that conservation measures and their implementation do not discriminate in form or in fact against the fishermen of any State.

Source: Title: UNITED NATIONS CONVENTION ON THE LAW OF THE SEA
http://www.univie.ac.at/RI/KONTERM/intlaw/konterm/vrkon_en/html/doku/unclos.htm#162.0

UNITED NATIONS CONVENTION ON THE LAW OF THE SEA

Box 3.1 (Continued)

Section 2: PRINCIPLES GOVERNING THE AREA

Article 136: Common heritage of mankind
The Area (High Seas) and its resources are the common heritage of mankind.

Article 137: Legal status of the Area and its resources
No State shall claim or exercise sovereignty or sovereign rights over any part of the Area or its resources, nor shall any State or natural or juridical person appropriate any part thereof. No such claim or exercise of sovereignty or sovereign rights nor such appropriation shall be recognized.

Article 138: General conduct of States in relation to the Area
The general conduct of States in relation to the Area shall be in accordance with the provisions of this Part, the principles embodied in the Charter of the United Nations and other rules of international law in the interests of maintaining peace and security and promoting international co-operation and mutual understanding.

Article 140: Benefit of mankind
Activities in the Area shall, be carried out for the benefit of mankind as a whole.

Article 141: Use of the Area exclusively for peaceful purposes
The Area shall be open to use exclusively for peaceful purposes by all States, whether coastal or land-locked, without discrimination and without prejudice to the other.

Article 143: Marine scientific research
Marine scientific research in the Area shall be carried out exclusively for peaceful purposes and for the benefit of mankind as a whole.

Article 145: Protection of the marine environment
Necessary measures shall be taken in accordance with this Convention to ensure effective protection for the marine environment from harmful effects which may arise from such activities. To this end the Authority shall adopt appropriate rules, regulations and procedures for:

(a) the prevention, reduction and control of pollution and other hazards to the marine environment, including the coastline, and of interference with the ecological balance of the marine environment, particular attention being paid to the need for protection from harmful effects of such activities as drilling, dredging, excavation, disposal of waste, construction and operation or maintenance of installations, pipelines and other devices related to such activities;

(b) the protection and conservation of the natural resources of the Area and the prevention of damage to the flora and fauna of the marine environment.

Article 146: Protection of human life
Necessary measures shall be taken to ensure effective protection of human life.

Source: Title: UNITED NATIONS CONVENTION ON THE LAW OF THE SEA
http://www.univie.ac.at/RI/KONTERM/intlaw/konterm/vrkon_en/html/doku/unclos.htm#162.0

3.2 FAO Code of Conduct for Responsible Fisheries

The **FAO Code of Conduct for Responsible Fisheries**[8] was adopted on 31 October 1995 and provides a framework for sustainable exploitation of aquatic living resources through conservation, management and development with due respect for the ecosystem and biodiversity. It highlights appropriate management principles such as:

- avoidance of excess fishing capacity
- the need to take into account the interest of fishers including those engaged in subsistence and small-scale fisheries
- conservation of aquatic habitats and ecosystems
- protection of endangered species
- correction of adverse environmental impacts.

Responsible fish utilization is highlighted including the consumers' right to safe, wholesome and unadulterated fish and fishery products. Processing and marketing of fish and fishery products to reduce post-harvest losses and waste are encouraged as well as efforts to improve the use of by-catch consistent with responsible fisheries management practices. The general principles of the Code of Conduct for Responsible Fisheries are set out in Box 3.2.

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[8] The Committee on Fisheries (COFI) at its Nineteenth Session in March 1991 called for the development of new concepts which would lead to responsible, sustained fisheries. Subsequently, the International Conference on Responsible Fishing, held in 1992 in Cancûn (Mexico) further requested FAO to prepare an international Code of Conduct to address these concerns. The outcome of this Conference, particularly the Declaration of Cancûn, was an important contribution to the 1992 United Nations Conference on Environment and Development (UNCED), in particular its Agenda 21. Subsequently, the United Nations Conference on Straddling Fish Stocks and Highly Migratory Fish Stocks was convened, to which FAO provided important technical back-up. In November 1993, the Agreement to Promote Compliance with International Conservation and Management Measures by Fishing Vessels on the High Seas was adopted at the Twenty-seventh Session of the FAO Conference (Annex 1).

FAO Code of Conduct for Responsible Fisheries
Box 3.2 - General Principles

6.1 States and users of living aquatic resources should conserve aquatic ecosystems. The right to fish carries with it the obligation to do so in a responsible manner so as to ensure effective conservation and management of the living aquatic resources.

6.2 Fisheries management should promote the maintenance of the quality, diversity and availability of fishery resources in sufficient quantities for present and future generations in the context of food security, poverty alleviation and sustainable development. Management measures should not only ensure the conservation of target species but also of species belonging to the same ecosystem or associated with or dependent upon the target species.

6.3 States should prevent over fishing and excess fishing capacity and should implement management measures to ensure that fishing effort is commensurate with the productive capacity of the fishery resources and their sustainable utilization. States should take measures to rehabilitate populations as far as possible and when appropriate.

6.4 Conservation and management decisions for fisheries should be based on the best scientific evidence available, also taking into account traditional knowledge of the resources and their habitat, as well as relevant environmental, economic and social factors. States should assign priority to undertake research and data collection in order to improve scientific and technical knowledge of fisheries including their interaction with the ecosystem. In recognizing the transboundary nature of many aquatic ecosystems, States should encourage bilateral and multilateral cooperation in research, as appropriate.

6.5 States and subregional and regional fisheries management organizations should apply a precautionary approach widely to conservation, management and exploitation of living aquatic resources in order to protect them and preserve the aquatic environment, taking account of the best scientific evidence available. The absence of adequate scientific information should not be used as a reason for postponing or failing to take measures to conserve target species, associated or dependent species and non-target species and their environment.

6.6 Selective and environmentally safe fishing gear and practices should be further developed and applied, to the extent practicable, in order to maintain biodiversity and to conserve the population structure and aquatic ecosystems and protect fish quality. Where proper selective and environmentally safe fishing gear and practices exist, they should be recognized and accorded a priority in establishing conservation and management measures for fisheries. States and users of aquatic ecosystems should minimize waste, catch of non-target species, both fish and non-fish species, and impacts on associated or dependent species.

6.7 The harvesting, handling, processing and distribution of fish and fishery products should be carried out in a manner which will maintain the nutritional value, quality and safety of the products, reduce waste and minimize negative impacts on the environment.

6.8 All critical fisheries habitats in marine and fresh water ecosystems, such as wetlands, mangroves, reefs, lagoons, nursery and spawning areas, should be protected and rehabilitated as far as possible and where necessary. Particular effort should be made to protect such habitats from destruction, degradation, pollution and other significant impacts resulting from human activities that threaten the health and viability of the fishery resources.

6.9 States should ensure that their fisheries interests, including the need for conservation of the resources, are taken into account in the multiple uses of the coastal zone and are integrated into coastal area management, planning and development.

6.10 Within their respective competences and in accordance with international law, including within the framework of subregional or regional fisheries conservation and management organizations or arrangements, States should ensure compliance with and enforcement of conservation and management measures and establish effective mechanisms, as appropriate, to monitor and control the activities of fishing vessels and fishing support vessels.

FAO Code of Conduct for Responsible Fisheries
Box 3.2 - General Principles (Continued)

6.11 States authorizing fishing and fishing support vessels to fly their flags should exercise effective control over those vessels so as to ensure the proper application of this Code. They should ensure that the activities of such vessels do not undermine the effectiveness of conservation and management measures taken in accordance with international law and adopted at the national, subregional, regional or global levels. States should also ensure that vessels flying their flags fulfil their obligations concerning the collection and provision of data relating to their fishing activities.

6.12 States should, within their respective competences and in accordance with international law, cooperate at subregional, regional and global levels through fisheries management organizations, other international agreements or other arrangements to promote conservation and management, ensure responsible fishing and ensure effective conservation and protection of living aquatic resources throughout their range of distribution, taking into account the need for compatible measures in areas within and beyond national jurisdiction.

6.13 States should, to the extent permitted by national laws and regulations, ensure that decision making processes are transparent and achieve timely solutions to urgent matters. States, in accordance with appropriate procedures, should facilitate consultation and the effective participation of industry, fishworkers, environmental and other interested organizations in decision making with respect to the development of laws and policies related to fisheries management, development, international lending and aid.

6.14 International trade in fish and fishery products should be conducted in accordance with the principles, rights and obligations established in the World Trade Organization (WTO) Agreement and other relevant international agreements. States should ensure that their policies, programmes and practices related to trade in fish and fishery products do not result in obstacles to this trade, environmental degradation or negative social, including nutritional, impacts.

6.15 States should cooperate in order to prevent disputes. All disputes relating to fishing activities and practices should be resolved in a timely, peaceful and cooperative manner, in accordance with applicable international agreements or as may otherwise be agreed between the parties. Pending settlement of a dispute, the States concerned should make every effort to enter into provisional arrangements of a practical nature which should be without prejudice to the final outcome of any dispute settlement procedure.

6.16 States, recognising the paramount importance to fishers and fishfarmers of understanding the conservation and management of the fishery resources on which they depend, should promote awareness of responsible fisheries through education and training. They should ensure that fishers and fishfarmers are involved in the policy formulation and implementation process, also with a view to facilitating the implementation of the Code.

6.17 States should ensure that fishing facilities and equipment as well as all fisheries activities allow for safe, healthy and fair working and living conditions and meet internationally agreed standards adopted by relevant international organizations.

6.18 Recognizing the important contributions of artisanal and small- scale fisheries to employment, income and food security, States should appropriately protect the rights of fishers and fishworkers, particularly those engaged in subsistence, small-scale and artisanal fisheries, to a secure and just livelihood, as well as preferential access, where appropriate, to traditional fishing grounds and resources in the waters under their national jurisdiction.

6.19 States should consider aquaculture, including culture-based fisheries, as a means to promote diversification of income and diet. In so doing, States should ensure that resources are used responsibly and adverse impacts on the environment and on local communities are minimized.

3.3: Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)

The Convention on International Trade in Endangered Species of Wild Fauna and Flora Levels (CITES) is based on the premise that exploitation and trade in certain animal and plant species together with other factors such as habitat loss, are capable of rapidly depleting their populations and even threaten to bring some species close to extinction. The aim therefore is to ensure that international trade in specimens of wild animals and plants does not threaten their survival. While many other wildlife species in the trade are not endangered, the existence of such an agreement aims to ensure the sustainability of the trade, thereby safeguarding these resources for future generations.

CITES was drafted in 1963 and became effective on July 1, 1975[9]. It is an international agreement to which countries adhere voluntarily. Although legally binding on the Parties, that is, they have to implement the Convention; it does not replace national laws. Countries therefore have to adopt domestic legislation to ensure implementation at the national level.

CITES subject international trade of selected species to certain controls, requiring authorization through licensing all import, export, re-export and introduction from the sea of species covered by the Convention. The species covered by CITES are listed in Annex 3, according to the degree of protection required.

- Appendix I includes species threatened with extinction. Trade in specimens of these species is permitted only in exceptional circumstances.
- Appendix II includes species not necessarily threatened with extinction, but in which trade must be controlled in order to avoid utilization incompatible with their survival.
- Appendix III contains species that are protected in at least one country, which has asked other CITES Parties for assistance in controlling the trade.

An estimated 5,000 species of animals and 28,000 species of plants are protected by CITES grouped according to the level of threat. The list include some whole groups, such as primates, cetaceans (whales, dolphins and porpoises), sea turtles, parrots, corals, cacti and orchids. In some cases, only a sub-species or geographically separate population of a species (for example, the

[9] CITES was drafted as a result of a resolution adopted in 1963 at a meeting of members of IUCN (The World Conservation Union). The text of the Convention was finally agreed at a meeting of representatives of 80 countries in Washington DC., USA.

population of just one country) are listed. Table 3.1 below shows the selected number of species included in the CITES Appendices.

Table 3.1: Selected listing of Aquatic Species included in the CITES Appendices

	Appendix I	Appendix II	Appendix III
Mammals	228 spp. + 21 sspp. + 13 popns	369 spp. + 34 sspp. + 14 popns	57 spp. + 11 sspp.
Birds	146 spp. + 19 sspp. + 2 popns	1401 spp. + 8 sspp. + 1 popn	149 spp.
Reptiles	67 spp. + 3 sspp. + 4 popns	508 spp. + 3 sspp. + 4 popns	25 spp.
Amphibians	16 spp.	90 spp.	-
Fish	9 spp.	68 spp.	-
Invertebrates	63 spp. + 5 sspp.	2030 spp. + 1 ssp.	16 spp.
Plants	298 spp. + 4 sspp.	28074 spp. + 3 sspp. + 6 popns	45 spp. + 1 ssp. + 2 popns
Totals	827 spp. + 52 sspp. + 19 popns	32540 spp. + 49 sspp. + 25 popns	291 spp. + 12 sspp. + 2 popns

Data Source: CITES. The text of the Convention

A selected list of marine species included in CITES is presented in Annex 3 as indicated and the listing for CARICOM signatory countries appears in Annex 4.

Section B

Trade Agreements and Trading Blocks

3.4: The World Trade Organization

The General Agreement on Tariffs and Trade (GATT) provided for the liberalisation of trade in goods through tariffication, tariff reduction and the elimination of trade-distorting domestic support while the WTO's Uruguay Round agreement comprised of a series of agreements aimed at gradual opening of international markets in goods, services and traded inventions. The Agreement on Technical Barriers to Trade (TBT) that came out of the WTO agreement seeks to ensure that technical standards, regulations and conformity assessment procedures do not create unnecessary trade barriers. Countries may adopt standards they deem appropriate for human, animal or plant health, protection of the environment and consumers, but while the agreement encourages the use of international standards, it discourages policies that give domestic goods an unfair advantage. The agreement on the application of Sanitary and Phytosanitary Measures (SPS) complements the TBT, aimed at encouraging a balance between protection of health and safety on the one hand and international trade on the other, as well as the use of international standards on food safety, animal and plant health. Higher standards may be applied by countries but only to the extent necessary to protect human, animal, plant life and health. They should not discriminate between countries with identical or similar conditions.

The Agreement on Subsidies and Countervailing Measures (SCM) discipline the use of subsidies for products not covered by the Agreement on Agriculture, under which fishery products may fall and subject to interpretation. Should disputes arise, States can either launch the WTO dispute-settlement procedure or make its own inspection and charge a countervailing duty on imports to reduce the disadvantage placed on domestic producers.

Two years following the "Battle in Seattle" (November 1999), 140 nations agreed to expand the WTO's scope to include fisheries policies. No concrete proposals about new rules are yet on the table but there have been discussions in the WTO Committee on Trade and Environment on the role subsidies play in facilitating overfishing and there is still a range of views about the need for new disciplines. Countries argue that the specific features of the fisheries sector limit the

effectiveness of existing subsidies disciplines. Inclusion of fisheries in the next round of WTO negotiations has led to widespread speculation and concerns, some of which are as follows:

(i) Higher price volatility will lead to upward price risk for low-income food-importing countries.

(ii) The bulk of poverty is found in rural areas and traditional fishing communities and will thus impact negatively on those already disadvantaged.

(iii) The AoA seems to have rewarded developed countries for past heavy subsidization, but withholds from developing countries the same rights, simply because they were too poor to finance such subsidies in the past.

(iv) Budgetary constraints and previous commitments under SAPs appear to be much more limiting than WTO disciplines. In this round, greater flexibility than the current provisions should be negotiated.

(v) Global trade rules currently reflect mainly the interests of large multinational corporations.

(vi) WTO rules now being proposed for the world's fisheries could seriously restrict national governments' abilities to regulate their own fisheries.

(vii) Fisheries policy-making is increasingly moving off-shore, to the arena of international trade negotiations between nations. As a result, nearly every national fishery management policy, tool or conservation programme that might restrict corporate access to fisheries or seafood markets could potentially be classified as a violation of the rules of global free trade.

(viii) With regards to **market access,** WTO bureaucrats and corporations already consider many of the policies that conserve fisheries (and the communities that depend on the resource) to be "barriers to free trade."

(ix) Lowering tariffs in the absence of adequate safeguards for marine ecosystems could accelerate the death spiral of the world's fish stocks and fishing communities.

(x) Cutting tariffs reduces prices, stimulates consumption and creates pressures on government to export fish which were otherwise intended for local markets or they may simply sell quotas to foreign fleets to the detriment of local fishing fleets.

(xi) **Non Tariff Measures (NTMs):** developed countries include just about anything that might keep them out as a "non-tariff measure"

(xii) WTO is saying that labels informing consumers are themselves barriers to trade because they might discriminate against imports.

(xiii) With respect to GMO's, WTO has already ruled that governments may not "discriminate" against imports based on how something was produced.

(xiv) Eco-labels - some nations have already made clear their intentions to challenge eco-labels as discriminatory under the WTO's free trade rules.

(xv) Invasive species and foreign diseases - The SPS Agreement does not recognize the precautionary principle when allowing governments to implement protections at the border. The burden of proof is thus always on the public to prove something is NOT safe, never on the industries to prove that it is.

(xvi) The NTM elimination agenda has become the "final push" to remove all national or regional governmental controls over natural resources like fisheries.

(xvii) The "Anti-Dumping Agreement" while loathed as "protectionist" are sometimes necessary for protecting the livelihoods of the poor or for maintaining sometimes more expensive but ecologically more sustainable practices.

(xviii) Sustainable harvesting methods are threatened by cheap seafood imports.

(xix) Fluctuating global commodity prices have destabilized local communities and made long-term planning for natural resource protection impossible.

(xx) With respect to the World Fishing Industry the WTO is not the appropriate place to handle this problem.

(xxi) The Doha Summit text mentions the subject of fisheries subsidies but the language contains no explicit conservation mandate.

(xxii) It is still not clear how the WTO will be defining "fisheries subsidies."

(xxiii) Foreign investment and Individual Fishing Quotas (IFQs) may also be seriously impacted by new WTO investment rules. Stipulations on fleet sizes, standards for fishing gear, and residency requirements ("fish here, live here" policies may be considered as NTMS). Trade negotiators (especially from nations with substantial

long-distance fleets looking for new fishing grounds to exploit) will view these kinds of measure as "discriminatory" against foreign investors.

(xxiv) When government privatize a public entity (say, state-owned companies, social services or even concessions to exploit natural resources), they must do so only according to new WTO rules. Thus, conditions imposed on IFQ systems to protect fishermen and fishing communities could be threatened by WTO investment rules.

(xxv) One of the other main principles advanced by the United States and the European Union is a ban on so-called "performance requirements." If such WTO challenges were successful in overturning ownership limits, then IFQ programs would gradually become dominated by large foreign investment corporations, turning real commercial fishermen into a new variety of sharecropper.

(xxvi) The "Investor-State Mechanism" which exists under NAFTA and there are moves to include under WTO, allows private corporations to sue a foreign government for enacting measures that reduce the *planned* profits of the foreign investor. The corporations and their investors, who make money from destroying those watersheds, would thus have to be paid "protection money" not to continue their destruction.

The concerns highlighted above may be deemed credible and valid from a CARICOM conext at this time. It has also been highlighted here to show the potential for controversy that may arise should fisheries be included in the new WTO agreement.

3.5 Free Trade Area of the Americas (FTAA)

The idea of the FTAA began at the Summit of the Americas, held in Miami, USA in December 1994. This trade block will include 34 countries in the western hemisphere (excluding Cuba), in which barriers to trade and investment will be progressively eliminated. Negotiations are to be concluded no later than January 2005 and will seek to become effective as soon as possible thereafter, no later than December 2005.

The FTAA negotiations were formally launched in April 1998 at the Second Summit of the Americas in Santiago, Chile. It is agreed that the FTAA Agreement will be balanced, comprehensive, WTO-consistent and constitute a single undertaking. It should be transparent and takes into account the differences in the levels of development and size of the economies in the

Americas in order to facilitate full participation by all countries. Negotiations are to contribute towards raising living standards, improving working conditions of all people in the Americas, and better protect the environment.

The negotiations must address the differences in the levels of development and size of economies of the hemisphere and allow countries within the FTAA to agree to additional obligations and benefits which can be developed through plurilateral negotiations. Provisions in market access; agriculture, services, investment; government procurement; intellectual property, competition policy, subsidies, antidumping, and countervailing duties, and dispute settlement must be included.

SPS measures must be WTO consistent and not be maintained to distort trade. The elimination of agricultural export subsidies affecting trade in the Hemisphere must also be addressed. But there have also been concerns about the negative impact of the FTAA by various interest groups, some of which are outlined below:

(1) **Different levels of development:** the United States has a GDP equal to 75 percent of the total goods and services produced in the hemisphere. Its capacity to mobilize technological and capital resources is far greater than that of most of the Americas. But the FTAA would establish a system under which poor countries and wealthy countries alike are held to the same standards, to compete on a level playing field when the terrain is already so badly skewed.

(2) Not everyone loses in "free trade" agreements. Already established business stand to gain financially from a system that puts their interests above all others.

(3) Governments should retain the right to impose performance requirements on investors and to maintain food and nutrition security.

(4) Rules that promote foreign investment are often in direct conflict with local economic development policies. National treatment requires foreign investors to be treated no differently than local investors. Policies that limit fisheries to local citizens and forbid foreign investors from owning domestic utilities, for example violate national treatment.

(5) **Public Interest Laws Threatened:** FTAA negotiators want to include investor-to-state lawsuits in the upcoming treaty. A look at some past lawsuits illustrates how these suits

are being used to elevate corporate profits above all other interests. Investor-to-state lawsuits established by NAFTA's Chapter 11 give corporations the right to sue governments for any action that may decrease the corporation's future profits.

3.6 CARICOM Single Market & Economy (CSME)

The treaty of Chaguaramas allows a waiver of import duties on goods of CARICOM origin and a 40% CET is applied on imports from outside the region. The CARICOM Single Market & Economy (CSME) which is carded to become operational in January 2005 seeks to further convert its 15 Member States into a single, enlarged economic entity which will further reduce cross-border restrictions thereby facilitating the free movement of **final products, goods, labor and services (including capital)**. Under the CSME proposal, university graduates, athletes, musicians, artists, entrepreneurs, service providers' managerial, supervisory and technical staffs would have the right to move freely within the Region.

Member States will be required to remove impediments that restrict the right to provide services across the single market and they must ensure that nationals from other Member States have access to land, buildings and other property on a non-discriminatory basis if required in the provision of services. CARICOM represents a market of 14 million persons in the regional grouping.

The CSME is expected to provide opportunities to boost regional trade, increase intra-regional alliances and take-overs and address the issue of like treatment for similar businesses services. This can lead to improvement in the level of competitiveness and improvement in goods and services to the benefit of consumers.

But concerns and fears have also been expressed about the CSME, these include:

(1) The less stable economies will be threatened.

(2) There will be dislocations in labour in the weaker sectors in Member States.

(3) The stability and growth rates are different and therefore disparities will be widened.

(4) Divergent macroeconomic policies and performance exist among member states.

Section C

Preferential Trade Agreements - Unilateral and Bilateral Agreements

Trade agreements have been used by countries to gain preferential access into various other countries' markets. These agreements and arragangements may be unilateral, bilateral and pluraliteral.Many of the agreements for which CARICOM have agreed to be unilateral are more limited in scope. This is in sharp contrast to the WTO and FTAA agreements, which are more plurilateral in nature and to which non-compliance can have serious polictical and economic consequences.

This Section reviews the major trade agreements to which CARICOM countries are signatory. First, the EU / ACP economic partnership agreement with the EU, the Lome Convention and the Cotonou Agreement are discussed, followed by the Caribcan and the CBI trading arrangements. Next the bilateral agreements are presented --CARICOM - Costa Rica ; CARICOM – Colombia, CARICOM – Dominican Republic, CARICOM – Cuba and CARICOM – Venezuela. Summaries of the key features of these trade agreements and arrangements are presented in Box 3.1.

Box 3.1
Preferential Trade Agreements - Key Features

ACP/EU - Unilateral extension by the European Union of preferential duty free access to the EU market for almost all imports from African, Caribbean and Pacific states.

Caribcan – Unilateral extension by Canada of preferential duty free access to the Canadian market for almost all imports from Commonwealth Caribbean Countries.

CBERA (CBI) –Beneficiary countries (all CARICOM excluding Suriname) unilateral duty free access to its market for products grown or manufactured in their respective countries.

CARICOM-Costa Rica: Bilateral agreement between CARICOM and Costa Rica. Initialed on March 15, 2003 the agreement provides for liberalized trade and also preferential access for a wide range of products. Some sensitive products have been excluded. A special list of products will be granted differentiated market access between Costa Rica and each of the CARICOM MDCs. (Source http://www.crnm.org/bilateral.htm)

CARICOM -Cuba: The Agreement on Trade and Economic Cooperation between CARICOM and the Government of the Republic of Cuba was signed on 5 July, 2000.

(Source http://www.crnm.org/bilateral.htm)

CARICOM - Colombia The first bilateral agreement between CARICOM and Colombia was secured in July 1994. The CARICOM/Colombia Agreement began as a non-reciprocal agreement but had to provide for a level of reciprocity to Colombia after a period – four years.

(Source http://www.crnm.org/bilateral.htm)

CARICOM - Dominican Republic – The CARICOM-Dominican Republic agreement provisionally entered into force in December 2001. The Agreement is based on reciprocity with the five CARICOM MDCs and non-reciprocity with the LDCs until the year 2005. It provides for the asymmetrical application of the reciprocity principle as CARICOM LDCs are not required to reciprocate treatment. (Source http://www.crnm.org/bilateral.htm)

CARICOM - Venezuela – Imports from CARICOM member states are allowed free access to its market, under the most-favoured-nation tariff treatment. CARICOM also has a bilateral trade agreement with Venezuela, secured in October 1992. The CARICOM-Venezuela Trade and Investment Agreement was signed in October 1992 and became effective on 1 January 1993. The Agreement is a one-way preferential agreement concluded under the facility for non-reciprocal partial scope agreements available to members of the Latin American Integration Association (LAIA). (Source http://www.crnm.org/bilateral.htm)

3.7 EU / ACP: LOME Convention

The Lome Convention offers dutyfree access to the 15 European Union States from 70 ACP (African-Caribbean-Pacific) countries, including 15 in the Caribbean. The Fourth ACP/EU Lomé Convention, expired on February 29, 2000. In its place, a new Partnership Agreement between the 77 ACP countries and the 15 member states of the European Union was signed in Cotonou, Benin on 23rd June 2000[10].Virtually all ACP exports are covered by Lome and there are special protocols covering sugar, rum and bananas.

3.8 CARIBCAN

The CARIBCAN programme allows unilateral extension by Canada of preferential duty free access to the Canadian market for almost all imports from the Commonwealth Caribbean countries. Products are eligible for duty-free status if they are certified as being grown or manufactured in the Commonwealth Caribbean, defined as having a minimum input of 60 percent of the ex-factory price of the goods (including overhead and reasonable profits) originating in any of the Commonwealth Caribbean countries or in Canada. Textiles and apparel, footwear, luggage and handbags, leather garments, lubricating oils and methanol are not included under this programme.

Countries which receive Caribcan treatment: Anguilla, Antigua & Barbuda, Bahamas, Bermuda, Barbados, Belize, British Virgin Islands, Cayman Islands, Dominica, Grenada, Guyana, Jamaica, Montserrat, St Kitts/Nevis, St Lucia, St Vincent & the Grenadines, Trinidad & Tobago, Turks & Caicos Islands.

3.9 Caribbean Basin Initiative (CBI)

The United States of America's Caribbean Basin Trade Partnership Act of October 2, 2002 (CBPTA II) proclamation declares the 24 current beneficiary countries of the Caribbean Basin Initiative to be "beneficiary countries" for purposes of the enhanced trade preferences. In

[10] Cotonou Agreement: The Cotonou Agreement was signed in Cotonou, the capital of Benin on June 23, 2000 and represents a new partnership of cooperation between the European Union and the 77 African, Caribbean and Pacific States (ACP). The purpose of the agreement is to allow the EU and the ACP countries to work together for poverty reduction, sustainable development and the gradual integration of the ACP countries into the world economy. The agreement that replaced Lome I to IV will be reviewed every five years and will last for twenty years.

addition, the Proclamation modifies the Harmonized Tariff Schedule to reflect the new trade preferences. The Act provides NAFTA-equivalent tariff treatment for certain items previously excluded from duty-free treatment under the CBI program (e.g., footwear, canned tuna, petroleum products, watches and watch parts).

Beneficiary Country Designation: Beneficiary countries are Antigua and Barbuda, Aruba, Bahamas, Barbados, Belize, Costa Rica, Dominica, Dominican Republic, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Montserrat, Netherlands Antilles, Nicaragua, Panama, St. Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Trinidad and Tobago, and British Virgin Islands.

3.10 CARICOM - Costa Rica

The CARICOM-Costa Rica bilateral Free Trade Agreement was signed on March 9, 2004. CARICOM MDCs - Barbados, Guyana, Jamaica, Suriname and Trinidad and Tobago will provide duty free access to most products from Costa Rica. CARICOM less developed countries - OECS and Belize enjoys duty free access to Costa Rica but are not required to grant similar access to Costa Rican products. A limited number of products will continue to attract duty when traded under the Agreement and the duty on some others will be phased out by January 1, 2007.

Under **Part Two: Trade in Goods, Chapter III: National Treatment and Access of Goods to the Market**, fishery products are excluded from the tariff elimination schedule of both CARICOM and Costa Rica, thus the MFN tariff shall be applied (see list in Annex 5). Further, fishery products are included under Section D Special list, which subject these items to different preferential treatments, as specified for each country. The treatments granted under this arrangement are: immediate free access upon the entry into force of this Agreement; exclusion, according to Article 02. B of this Annex; and phase out, according to Article 02. C (see Annex 5 of this study for listing).

3.11 CARICOM - Colombia

Under the CARICOM – Colombia agreement, Colombia agrees to grant products originating in Member States of CARICOM free access to its market by means of the implementation of programmes for the elimination of non-tariff barriers and for the elimination of tariff as set out in Annex I and Annex II to the Agreement. The tariff on the products listed in Annex I are to be

eliminated and those listed in Annex II were to be eliminated through three equal annual reductions on the entry into force of the Agreement. Further details are presented in Annex 6 of this study.

MFN treatment is to be applied to products listed in Annex III (an additional list of products chosen from CARICOM's exportable offer which may receive preferential treatment in Colombia beginning in the fourth year). MFN treatment is to be applied to customs tariff in respect of all imports from Colombia. Further, CARICOM shall not apply any non-tariff barriers on imports from Colombia beyond those currently in place and the MDCs of CARICOM namely, Barbados, Guyana, Jamaica and Trinidad and Tobago, shall introduce a programme to eliminate or reduce tariffs on an agreed list of products of export interest to Colombia commencing at the beginning of the fourth year. This agreement was signed on 24th day of JULY 1994 Cartegena, Colombia.

3.12 CARICOM - Dominican Republic

The CARICOM-Dominican Republic agreement provisionally entered into force in December 2001 and is based on reciprocity with the five CARICOM MDCs and non-reciprocity with the LDCs until the year 2005.

Attachment I lists goods which shall be subject to phased reduction of most favoured nation (MFN) rate of duty. These items (fishery products not included) will be subject to phased reduction of most favoured nation rate of duty over a five year period. Attachment II lists goods which shall be subject to MFN rate of duty. Fish is included under Attachment II.

Goods referred to in Article III:2(i)(b) and (ii)(b) of Annex I to the Agreement and set down in **Attachment I** to this Protocol shall be eligible for Phased Reduction of the MFN rate of duty to zero (0) percent by 1 January 2004 in the Dominican Republic and in the MDCs of CARICOM. The goods referred to in Article III:2(i)(c) and (ii)(c) of Annex I to the Agreement and set down in **Attachment II** of this Protocol one subject to the application of the MFN rate of duty by both Parties. The Less Developed Member States (LDCs) of CARICOM shall not be required to extend any presence other than the MFN rate of duty to imports from the Dominican Republic until the year 2005 (Table 3.2)

Table 3.2: CARICOM – DR Agreement Attachment II: Goods Which Shall Be Subject To MFN Rate Of Duty (extract)

TARIFF HEADING NUMBER	DESCRIPTION
03.02	Fish, fresh or chilled, excluding fish fillets and other fish meat of Heading No.03.04
03.03	Fish, frozen, excluding fish fillets and other fish meat of Heading No. 03.04
03.04	Fish fillets and other fish meat, (whether or not minced) fresh, chilled or frozen

3.13 CARICOM - Venezuela

CARICOM/Republic of Venezuela Agreement

The objective of this agreement signed on October 13, 1992 is to strengthen the economic and trade relations between CARICOM and Venezuela through the promotion and expansion of the sale of goods. CARICOM is allowed one-way duty-free access to the Venezuelan market through programmes of tariff reduction and the elimination of non-tariff barriers according to detailed schedules as laid out in the agreement with the exception of certain items[11].

Fishery products are not included in the products from the CARICOM's exportable offer with duty free access to the Venezuelan market. Details are presented in Annex 7 of this study.

3.14 CARICOM – Cuba

The Agreement on Trade and Economic Cooperation between CARICOM and the Government of the Republic of Cuba was signed on 5 July, 2000. The Caricom/Cuba Agreement stipulates that Cuba must grant products from CARICOM the following access conditions:

[11] *including but not limited to*, beef, certain milk products, coffee & cocoa beans, vegetable oils & fats, orange juices, oxygen, carbon dioxide, nitrous oxides, anhydrous ammonia, aluminum sulphate, other carboxylic acids, medicaments constituted by a mixture of products prepared for therapeutic or prophylactic use, urea, paints and varnishes based on modified synthetic or natural polymers, dissolved in an aqueous or non-aqueous medium, insecticides, disinfectants and a variety of iron & steel products. Source: Trade Point Port of Spain. http://www.tradetnt.com/agreementvenezuela.shtml .

1. Duty-free access for all products on the list of products being negotiated or CARICOM's and Cuba exportable offer.
2. Application of Most Favored Nation (MFN) treatment to products not appearing on the exportable offer of each party to the agreement.
3. Elimination of the tariff on a specified list of products (phased list) through four equal annual reductions commencing on the date of entry into force of the Agreement
4. A seasonal list for agricultural products which outlines the treatment of such products

The Agreement was signed in July 2000 but has not yet entered into force, as domestic implementation issues such as Cabinet approval has not yet been granted in some countries within the region. (Source: The Briefing Room. **http://www.thebriefingroom.net/tb20.html)**

Chapter 4

Trade and Other Policies in Various Countries

This Chapter examines the tariff and non-tariff measures various countries utilize to raise revenue, provide incentives and protect their borders. Specifically, the following are reviewed:

- Tariffs
- Incentives & Support
- Technology
- Infrastructure
- Quality Assurance and Food Safety
- Marketing Strategies

4.1 Tariffs

The WTO commitments on tariffs consist of undertakings by member countries that the applied tariffs will not exceed the 'bound' maximum levels. However, in many cases, the bound tariffs exceed both the applied tariffs and the levels of actual protection. This difference between the bound tariffs and actual levels of protection, termed '***water in the tariff***' must be eliminated otherwise inducing more trade through tariff cuts will be largely ineffective. In this section, a review is undertaken of the tariffs that apply to the fisheries sector of the major trading countries.

The EU applies the Generalized System of Preferences (GSP) to assist developing countries increase their export earnings, promote industrialization and accelerate their rates of economic growth. When a developing country is promoted to developed status, access into the market can be negatively affected. For example according to the new GSP in the EU, Thailand no longer qualifies as a developing country and therefore cannot benefit from the GSP. Thus, they lose preferential position on tariff, meaning higher import duties will be applied to Thai exports. The following increased rates for shrimps took effect in January 1999, causing a decrease in Thai exports to the EU (Table 4.1).

Currently, ACP countries benefit from a significant margin of preference under the Cotonou agreement. For example, non-ACP fisheries exporters of canned tuna faces a 22% EU import tariffs, fresh fish fillets 18%, fresh fish (some species) 15%, and fresh and frozen shrimp and prawn 12%. Should fisheries however successfully enter the WTO 'table', preferences are likely to be eroded as tariff rates to non-ACP countries decline. This competitive advantage will thus be lost. CARICOM countries will therefore have to compete with other ACP and non-ACP countries at prices 12-22% less than what was normally received because of tariff rate reduction. This is likely to translate into losses of revenue to fish exporters from ACP countries *ceteris paribus*. It is also pertinent to note here that countries who qualify under the Everything But Arms (EBA) initiative can increase exports to the EU, which can serve to lower prices and revenues further.

Table 4.1: Import Duty Levied on Thai Shrimp Products

Frozen Shrimp	Product Current Rate	Rate Effective July 1996	Rate Effective January 1999
Raw	4.5%	10.8%	14.4%
Cooked	6.0%	14.0%	20.0%

Source: National Food Institute (Thailand)

4.2 Trade liberalization, Globalization and CARICOM Fisheries

One of the requirements of Trade liberalization and Globalization is that participating countries are required to progressively move towards reduction and complete removal of barriers to trade on goods and services between and among countries. Countries participating in the global economy are thus expected to rapidly shift away from closed economic structures to ones that exhibit a high degree of openness. Accordingly, trade regimes in these countries have undergone significant restructuring to reflect a more facilitative environment. The policy measures adopted range from reduction of both general and specific tariff rates to the tariffication and subsequent removal of non-trade barriers. These movements are thus designed to enhance trade facilitation processes. Consistent with these developments is the need to improve the administration of these non-trade components of the trade policy regime especially those countries that have not or are slow to embrace the virtues of fully liberalized economic structures. Further, many countries in the Caribbean are still dependent on tariff collection to provide a substantial amount of their revenue.

Fish and fish-based products enjoy free movement between CARICOM states and enjoy duty free entry into certain metropolitan markets. In this section we provide some data on the current status of tariff rates that guide tariffication at the WTO. But this will be preceded by some discussion on the WTO and fisheries.

4.2.1 CARICOM Traiff structure

We first provide a review of the fishery trade policy regime of CARICOM followed by the categories of the tariffs and tax regimes. Tariff rates for all goods are first presented , followed by 'all goods' and 'other goods'; the Common External Tariff (CET); additional trade charges; and licencing requirements. This body of imformation on tariff rates are supplemented with data presented in the Annex for some countries: CARICOM- Belize, Guyana, Suriname, Jamaica and The Bahamas, and the USA and Canada. Nothwithstanding the above, fish and fish products originating in the Caribbean enter the Canadian market under the Caribcan arrangement, while into the USA market under the CBI / CBERA / CBPTA arrangement, benefiting from duty free status.. Despite this, certain species, such as shrimp are prohibited from entering the USA if they do not have turtle excluder devices in their nets.

Accordingly, the tariff structure for fish can be deemed discriminatory as fresh fish enters from most Caribbean countries free of duty while some value added products attract varying rates of duty and / or varying degree of preferences. We believe that such a practice tend to discourage development of value added activities and trade with CARICOM. However, while we understand the rationale for this, we think it forces individual processors to focus only on their domestic market.

Table 4.2 presents a profile of the CET level applied to agricultural and non-agricultural goods. The information shows the CET on agriculture-based goods are set at 40% while in the case of non-agriculture commodities, the tariff levels range from 5% to 35% at the end of 1993 to 5%-25% at 1/1/98 (Table 4.3).

The rest of additional trade charges currently in force are presented in Table 4.4 for thirteen CARICOM countries. Rates are presented for consumption tax, customer surcharge,, stamp duty, VAT and others. Consumption tax is highest in Jamaica and least for St Vincent and Guyana, while the custom surchages are systematically lower and vary according to the types of goods.

The table shows stamp duty for Barbados and Jamaica only while VAT is applied in Barbados, Belize, Trinidad and Tobago and Suriname. There are also other charges such as a 1% foreign exchange tax in Antigua and Barbados and a 5% refrigeration tax in Dominica. Environmental tax is also applied in certain countries and ranges from 5% to as high as 18%. Quantitative restrictions are also an additional component of many border control regimes. Trade policy regime in certain countries also includes import licencing for products based on their source of origin – CARICOM or non-CARICOM. This information is presented in Table 4.5.

Import of fish originating from non-CARICOM countries requiring licencing include St Kitts and Nevis and Trinidad and Tobago, while no import licences are required for fish originating from CARICOM countries. Enforcement of this regulation has in the past created difficulties in establishing the "source of origin".

Annexes 8, 9, 10, and 11 present the tariff structure for fishery products imported into Belize, Jamaica, Guyana, Suriname and the Bahamas, respectively. The tariff structure for imports into the USA and Canada are presented in Annexes 13 and 14.

Table 4.2 CARICOM Tariff Structure for Agricultural and Non-Agricultural Imports into the Region

Country	All Goods	Other Goods
Antigua & Barbuda	0 -35 %	40 % Primary agriculture
Bahamas	0- 42 %	30 -62% Durable goods
Barbados	5 -25%	40% Primary Agriculture
Belize	0 -30%	40% Primary Agriculture
Dominica	0 -30%	40% Primary Agriculture
Grenada	0 -25 %	40% Primary Agriculture
Guyana	5 - 25 %	40% Primary Agriculture
Jamaica	0 -50%	40% Primary Agriculture
Saint Kitts & Nevis	0- 30 %	40% Primary Agriculture
Saint Lucia	0 -30 %	40% Primary Agriculture
Saint Vincent & The Grenadines	0 -25 %	40% Primary Agriculture
Suriname	5 -30 %	40% Primary Agriculture
Trinidad & Tobago	5- 25 %	40% Primary Agriculture 20 -30 % Durable

Source: J. Michael Finger, Francis Ng and Isidro Soloaga, "Trade Policies in the Caribbean Countries: A Look at the Positive " (June, 1998)

Table 4.3 CARICOM – Common External Tariff Rates Reduction Schedule

CATEGORIES	1-1-1993-31-12-1994	1-1-1995-31-12-1996	1-1-1997-31-12-1997	1-1-1998
Agricultural Inputs	0	0	0	0
Non-competing primary inputs	5 (LDCs 0-5	5 (LDCs 0-5	5 (LDCs 0-5	5 (LDCs 0-5
Non-competing intermediate inputs	5 (LDCs 0-5	5 (LDCs 0-5	5 (LDCs 0-5	5 (LDCs 0-5
Non-competing capital inputs	5 (LDCs 0-5	5 (LDCs 0-5	5 (LDCs 0-5	5 (LDCs 0-5
Competing primary inputs 20 15 10 10	20	15	10	10
Competing capital goods	20	15	10	10
Selected imports	20	15	10	10
Competing intermediate inputs 25 20 15 15	25	20	15	15
Non-competing final goods	25	25-30	20-25	20
Agro-industry	30-35	25-30	20-25	20
Garments	30-35	25-30	20-25	20
General manufactures	30-35	25-30	20-25	20
Agriculture	40	40	40	40
LIST A	Suspended rates	Suspended rates	-	-
LIST B	Suspended rates LDCs	Suspended rates LDCs	-	-
LIST C	Minimum rates	Minimum rates	Minimum rates	Minimum rates
LIST D Parts I and III	Suspended rates LDCs	Suspended rates LDCs	-	-
Range of CET (Agriculture)	0-40	0-40	0-40	0-40
Range of CET (Non-agriculture)	5 -35	5 - 30	5 - 25	5- 20

Source: CARICOM, October 1992

Table 4.4 Additional Trade Charges

Country	Consumption Tax	Custom Surcharge	Stamp Duty	VAT	Others
Antigua & Barbuda	rates of 15%, 20% to 30% on M	5% on dutiable			1 % FET
Bahamas			2-10 % on M		
Barbados	5 %-30% on M	75%	20 % on M of NCA 10 % on M of CA	15% on M	1% FET BDS$.20 ET Et on alcoholic bev.
Belize 14% on M 15% on M 1.25 FET					
Dominica	25%	15% on Motor Veh., apples, & grapes			EC$0.25 ET 5 % on Refrige.
Grenada		5% on M		20 % on M 10% on M from CA	EC$0.25 ET EC$0.11 PT
Guyana	0 - 85 %				GS$10 ET
Jamaica	15% 9.09-176.92 % cars		25-56% alcohol 65-90% A&P		
St Kitts & Nevis	5-15% on M 12% clothing	2%	2%		
Saint Lucia	3%-45%	4%			Et on alcohol
St. Vincent & the Grenadines	0 %- 65%	2.50%			1 % FET and ET on CA Rum
Suriname				5 % services and 7% on goods	5%-18% Et on alcohol & tobacco
Trinidad &Tobago		5 % on agric. 60 % cane and sug 75 % refined Sug.		15 % on M	Et on alcohol and Tobacco

Sources and Notes**:** Tabulated from ACS Study on Obstacles to Trade
Notes**:** CA=CARICOM, NCA =Non-CARICOM, ET =Environmental tax, Et =Excise tax, FET= Foreign Exchange Tax, M= Imports, PT =Petrol tax, TT= Tourist tax, Sug= Sugar

Table 4.5 Import Licensing Requirements

Country	Non- CARICOM	CARICOM
ANTIGUA & BARBUDA	ML required for agricultural product	ML required for manufactured items such as furniture, wood etc.
BAHAMAS	None has been identified.	None has been identified.
BARBADOS	ML required agricultural goods animals and vegetable fats, and oil, fresh milk, meat and fish	ML for coconut, coin operated amusement machines, milk and cream, and etc
BELIZE	ML required agricultural goods Import of sensitive products is restricted	**na**
DOMINICA	ML required for manufactured goods(i.e. eggs, industrial gasses, plastic, live animal	**na**
GRENADA	ML for agricultural products such as chicken, pork and manufacturing products i.e. chairs, furniture, wooden & aluminum doors etc	ML for importation of gold bullion, and all other gold, firework and explosives
GUYANA	ML for agricultural products.	ML required for agricultural goods.
JAMAICA	Maintained a List covering 39 agricultural and manufactured product which require ML	Maintained a List covering 39 agricultural and manufacturing products which are subject to ML
ST KITTS & NEVIS	ML required for importation of agricultural commodities such as fish, meat, poultry and certain manufacturing goods i.e. tobacco, cigarettes, semi-manufactured gold, rum and television receiver	ML for sugar, beer, some appliances, food, and beverages
SAINT LUCIA	ML required for importation of agricultural products, foods and certain manufactured goods	
SAINT VINCENT & THE GRENADINES	ML required for importation of food & other goods.	ML required for importation of foods
SURINAME	ML required for all imports	ML required for all imports
TRINIDAD & TOBAGO	ML required for importation of live stock, live poultry, fish, oils and fats ML required for importation of industrial inputs as pork, powdered milk, vegetable fats, oil & ground coffee)	**na**

Source: Tabulated From ACS Studies on Obstacles to Trade. Notes: ML= Import Licensing.

4.3 Incentives & Support

Operational Definition of Subsidies Provided To The Fisheries Sector

The international fora have been trying to arrive at a suitable and operational definition of "subsidy" in order to analyze the effects of subsidies on resource sustainability and trade on fishery. The definition is intended respect the notion that a subsidy is a **national policy instrument that reflects an exception to a nationwide policy**. The exception is generally reflected both in the form of the policy instrument and in its effects.

There are currently no WTO provisions specific to fisheries subsidies, which are disciplined by the WTO's general rules (The Agreement on Subsidies and Countervailing Measures, and the Agreement on Implementation of GATT Article VI). Thus, paragraph 28 the Doha ministerial declaration served to commit WTO members to clarify and improve WTO disciplines on fisheries subsidies and also mandates that a broader negotiation be undertaken aimed at clarifying and improving these general disciplines. The general subsidies negotiation should preserve the basic concepts, principles and effectiveness of the existing WTO agreements and is to take into account the needs of developing and least-developed participants. The fisheries negotiation should also take into account the importance of the fisheries sector to developing countries.

The Doha Ministerial Declaration of 2001 explicitly called for negotiations aimed at clarifying and improving WTO disciplines on fisheries subsidies. The mandate reflects the concerns of the 'potentially harmful trade', the 'developmental and environmental effects of subsidies to the fisheries sector', and the benefits that stronger WTO disciplines would achieve.

Globally, estimates on the total amount of fisheries subsidies vary between sources, while at the same time efforts are being made to curtail them. The World Bank has estimated global fisheries subsidies between $14 to $20 billion or approximately 20% to 25% of turnover in this sector. Alternatively, the OECD and APEC made a more conservative estimate at just over $12 billion or 17% of turnover. Further, a 1999 OECD study estimated that the amount of subsidies was just short of $6 billion and broken down as follows: EC$1.2 billion, US $1.1 billion, Japan $2.5 billion, Canada $0.5 billion, Korea $0.4 billion.

The EU has also postulated a link between subsidies and the overcapacity in the fisheries sector and proposed that measures be taken to create a balance between the fishing fleets and the

resources available. They have since tabled a proposal to the WTO to ban all subsidies which cause overcapacity in the fisheries sector, proposing a complete ban of all subsidies which "enhance capacity."

Specifically, they proposed that **capacity-enhancing subsidies should be prohibited[12], and those aimed at reducing fishing capacity, and mitigating negative social and economic consequences of the restructuring of the fisheries sector should be considered permitted and therefore non-actionable[13].**

New Zealand[14] has also done a survey of previous proposals for classification of fisheries subsidies. They observed that different views exist on the merits of various types of government programmes in the fisheries sector and there are divergent views on whether or how particular programmes should be disciplined under WTO rules and further, quite different approaches are taken to the term "fisheries subsidies". They have stated **their objective is to secure improved subsidy disciplines which significantly reduce distortions to international fisheries production and trade, helping to reduce pressure on the world's fish stocks and to enhance the economic value to developing countries of their fisheries resources.**

New Zealand Study of Fishery Subsidies - Previous Categorizations Observed

In recent years several organizations have suggested schemes for categorizing subsidies in the fisheries sector.

[12] (a) Subsidies for marine fishing fleet renewal (e.g. construction of vessels, increase in fishing capacity); and (b) Subsidies for the permanent transfer of fishing vessels to third countries, including through the creation of joint enterprises with third country partners.

[13] (a) Subsidies to support the retraining of fishermen, early retirement schemes and diversification. (b) Limited subsidies for modernisation of fishing vessels to improve safety, product quality or working conditions or to promote more environmentally friendly fishing methods. However, any such modernisation must not increase the ability of the vessel to catch fish. (c) Subsidies to fishermen and vessel owners who have to temporarily stop their fishing activity, when stoppages are due to unforeseeable circumstances such as natural disasters, or in the framework of tie-up schemes linked to permanent capacity reduction measures in the context of recovery plans for overexploited fish stocks. (d) Subsidies for the scrapping of vessels and the withdrawal of capacity.

[14] Refer to : **http://www.mfat.govt.nz/foreign/tnd/wtonegotiations/fishsubsidiescategorynegs.html**

(a) Asia Pacific Economic Cooperation (APEC)

In 2000 APEC undertook a study into the nature and extent of subsidies in the fisheries sector of APEC member economies. The report identified financial transfers in six categories or "modalities":

- *Direct assistance to fishers and fisheries workers*
- *Lending support programmes*
- *Tax preferences and insurance support programmes*
- *Capital and infrastructure support programmes*
- *Marketing and price support programmes*
- *Fisheries management and conservation programmes*

The study suggested a further categorization of these programmes according to whether they would have the effect of increasing or decreasing fish stocks, and expanding or constraining fishing efforts.

(b) Organization for Economic Cooperation and Development (OECD)

The OECD study of government financial transfers in the fisheries sector in member countries used the following categorization as a basis for its analysis:

Fisheries infrastructure

- *Management, research, enforcement and enhancement*
- *Access to other countries' waters*
- *Decommissioning of vessels and licence retirement*
- *Investment and modernisation*
- *Income support and employment insurance*
- *Taxation exemptions*

(c) The United States of America

A paper submitted to the Committee on Trade and Environment by the United States in 2000 suggested categorising subsidies according to their economic/commercial impact. The two broad categories proposed were (a) cost-reducing subsidies and (b) subsidies that supported incomes and prices. Under the two broad headings the paper listed 10 specific categories as follows:

Cost Reducing Subsidies

- *Commercially applicable research funding*
- *Capital cost-reducing subsidies*
- *Reduction of income and sales taxes*
- *Risk mitigation*
- *Government ownership and State trading if inconsistent with market terms*
- *Assistance to shipbuilding specifically for fishing vessels*
- *Foreign access payments and assistance to foreign fishing ventures*

Subsidies that support Income and Prices:

- *Price support programmes*
- *Trade-promoting subsidies*
- *Sector-specific social assistance programmes*

The study specifically excluded from the list government programmes for fisheries management, science, enforcement, and most publicly financed port and landings facilities, as well as government-funded programmes that facilitate the transition to sustainable fisheries.

(d) Food and Agriculture Organization (FAO)

At the expert consultation on Economic Incentives and Responsible Fisheries in Rome held by the FAO in 2000, the experts outlined four "sets of subsidies":

- ***Set 1*** *Subsidies are government financial transfers that reduce costs and/or increase revenues of producers in the short term.*
- ***Set 2*** *Subsidies are any government interventions, regardless of whether they involve financial transfers, which reduce costs and/or increase revenues of producers in the short term.*

- ***Set 3*** *Subsidies are Set 2 Subsidies plus the short-term benefits to producers that result from the absence or lack of interventions by governments to correct distortions (imperfections) in production and markets that can potentially affect fisheries resources and trade*
- ***Set 4*** *Subsidies are government interventions, or the absence of correcting interventions, that affect the costs and/or revenues of producing and marketing fish and fish products in the short, medium or long term.*

In addition to the "sets of subsidies" the experts defined "categories of subsidies" which are grouped under two broad headings: **cost-reducing** and **revenue-enhancing** subsidies. They suggested a further break-down under "trade" and "sustainability" headings. (Annex 15 provides a more detailed explanation of Sets 1 - 4)

(e) United Nations Environmental Programme (UNEP)

A paper commissioned by the United Nations Environment Programme and published in 2002 suggested a synthesis of the above approaches. The simplified categorization proposed in the UNEP paper comprised the following:

- *Subsidies to capital costs including infrastructure*
- *Decommissioning and licence retirement*
- *Subsidies to access to foreign fisheries*
- *Subsidies to incomes*
- *Fisheries management services*

Categorization for the purpose of the Negotiations

After a review of the categorizations of various types of subsidies to the fisheries sector globally, there seem to be a great level of difficulty and need for clarification before specific proposals are tabled to address "fisheries subsidies" in an undifferentiated way. It is therefore recommended that efforts continue towards classification and categorization while countries addressing their particular circumstance at the WTO negotiations.

4.4 Technology

Harvesting of fishery resources are done utilizing various technologies, from artisanal to highly-industrial, using various types of vessels and equipment. The technology ranges from use of synthetic fiber enclosures, hydraulic equipment for gear and fish handling, electronics for fish finding, satellite-based technology for navigation and communications to use of outboard engines and oar-powered boats. Over the years, technological innovations have led to more efficient and economic fishing operations, improving physical labour productivity and improved access to resources.

The FAO has sought to define and classify the main categories of fishing gear based on the principles of how the fish or other prey are captured and, to a lesser extent, on the gear construction as follows:

(i) surrounding nets (including purse seines);

(ii) seine nets (including beach seines and Boat, Scottish/Danish seines);

(iii) trawl nets (including Bottom: Beam, Otter and Pair trawls, and Midwater trawls: Otter and Pair trawls);

(iv) dredgeslift nets;

(v) falling gears (including cast nets);

(vi) gillnets and entangling nets (including set and drifting gillnets; trammel nets);

(vii) traps (including pots, stow or bag nets, fixed traps)

(viii) hooks and lines (including handlines, pole and lines, set or drifting longlines, trolling lines)

(ix) grappling and wounding gears (including harpoons, spears, arrows, etc.)

(x) stupefying devices.

The advances in fiber technology and introduction of modern materials have led to changes in the design and size of fishing nets, mechanization of gear handling, improved vessel gear designs as well as electronic fish detection equipment. These have served to expand the scale and economics of fishing operations and together with improvements in refrigeration technology and fish processing, allowed vessels to remain at sea for longer periods. Although there have been significant advances in technology, there are still many small-scale fisheries that employ oar and motorized powered dugout canoes, pirogues and some lighter gear as well as iceboxes to help maintain the quality of the catch.

While technological development was aimed at increasing production, it may have also led to overfished stock and negative environmental impacts. Thus rather than 'strip mining', selective fishing is now being encouraged. Allowing non-targets to be released unharmed is becoming more important and even legislated. For example, non-targets or by-catch of turtles is becoming a trade restriction policy mechanism and import regulation into certain countries stipulates the use of turtle excluder devices[15].

4.5 Infrastructure

Fishing infrastructure includes wharves access roads to the fishing sites, refrigeration units, repair workshops, power supplies, loading and off-loading terminals, administrative offices, and processing plants. Facilities also include fish washing, processing, handling and refrigeration equipment, quality testing laboratory equipment, insulated boat containers and lorries, as well as construction of ice plants at main landing sites. This aspect is developed further in the country profiles presented in Part B of this report as well as Chapter 7.

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[15] (i) In the USA, environmental groups argued that the incidental capture of sea turtles in the shrimp fisheries of the Gulf of Mexico was a threat to the populations of several turtles. The USA authorities initiated programmes to solve this problem, and have subsequently developed and legislated for the use of Turtle Excluder Device (TEDs) in their Gulf fisheries (e.g. Watson *et al*., 1996). By various means, the USA government has also tried to enforce similar regulations in other countries seeking access to USA markets for their trawl-caught shrimp. This USA pressure has subsequently led to research and development of TEDs in other countries, including developing countries in Asia, like Thailand, Malaysia, and the Philippines, and in Latin American countries, such as Mexico. (Source: (<http://www.efi.fi/cis/english/background/wto.php>)

(ii) U.S. BANS BRAZILIAN, HONDURAN LOBSTERS
The U.S. State Department ruled that Brazilian and Honduran lobster production methods violate laws protecting sea turtles, and acted in May to ban export of their sea lobsters to the United States. New guidelines require that drag nets for lobsters be required to have turtle "excluders." The ban applies only to lobsters fished from the sea, not to those raised on fish farms. Honduran lobster exports were $73 million in 1995 and Brazilian exports to the United States are estimated at $30 million annually.

Ricardo Miranda, "U.S. Bans Brazilian and Honduran Lobsters," INTERPRESS SERVICE, May 3, 1996; Thelma Meji'a, "Greenpeace Blasts Central American Shrimp Industry,' TICO TIMES, April 19, 1996.

Greater focus is being placed of infrastructure, given the HACCP compliance regulations being adopted by many developed countries as a precondition for fishery exports into their markets.

4.6 Legislation and Regulations

The list of legislations and regulations is wide, ranging from measures to protect the environment and non-target species to those that protect human and animal life as well as health. For example, at the international level, one of the most prominent actions to reduce by-catch during fishing is the ban on large size driftnetting on the high seas through the UN General Assembly Resolution of 1990. The FAO Code of Conduct for Responsible Fisheries of 1995 is another major international document addressing the problem of selective fishing. More recently, the International Plan of Action for Reducing Incidental Catch of Seabirds in Longline Fisheries was adopted by the FAO Committee on Fisheries in 1999 to reduce by catch. Other regulations include the **United Nations Convention on the Law of the Sea (UNCLOS)** and the **Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES).** These also seek to regulate fishing, protect endangered species and promote sustainability.

Additionally, there are other legislations and regulations outlined by the WTO. Some are peculiar to specific countries (which may not be WTO compliant) such as the use of **Turtle Excluder Device** (TEDs) in the USA's Gulf fisheries and the **US Pelly Amendmen**t as well as the **International Convention for the Regulation of Whaling** to control whaling. Various health regulations are discussed in detail in Chapter 5. These include:

- Technical Barriers to Trade (TBT)
- Health and Food Safety
- Food Safety and Quality Assurance
- Sanitary and Phytosanitary Measures (SPS):
- The FAO/WHO Codex Alimentarius
- EU Food Safety Regulations
- USA FDA Seafood HACCP Regulations
- USA Public Health Security and Bioterrorism Preparedness and Response Act

4.7 Quality Assurance and Food Safety

Globally, the aim now is to increase the capacity of food industry businesses to make strategic market decisions about global opportunities. Increasing focus is being placed on the following:

- issues relating to implementation of food safety and quality systems
- quality and integrity
- global food regulatory and commercial requirements

Countries must then increasingly develop the necessary infrastructure and legislature to improve their standards in order to acquire and / or retain market share.

4.8 Marketing Strategies

Countries employ various marketing strategies to promote exports. For example, the U.S. use its Department of Agriculture's Foreign Agricultural Service (FAS) to provide fishery producers, processors and distributors with international market intelligence, export assistance, and promotion networks to compete effectively in the fast-paced, growing global market for fishery products. The USDA Market Intelligence publishes the Fishery Products Trade Circular (published monthly on the Forest and Fishery Products Division web site) which identifies international market opportunities and competition for U.S. fishery products, through FAS annual attaché country reports. In addition, the Fishery Products Trade Circular provides current information on worldwide developments and trade trends in fish and seafood markets. In addition to identifying new opportunities for U.S. worldwide, export logistics is provided in the published Guide to Exporting Fishery Products. Utilization, supply and demand projections are published in a timely manner.

The Foreign Agricultural Service also assess domestic firm's export readiness, advises on sanitary requirements, tariffs and non-tariff barriers affecting exports (e.g. taxes, quotas). The service also organize trade promotions and risk reduction for first time exporter under the USDA's Export Credit Guarantee Programs and guidance from FAS agricultural attachés located in over 70 countries.

In the USA, there is also a non-profit fish industry groups called "cooperators" who commit substantial funding and staffing resources to work with FAS to promote U.S. fishery product exports. Their activities include working with State agencies, trade associations, and regional development groups to participate in international trade shows and trade missions, presenting seminars and culinary demonstrations on various U.S. fish species. Their portfolio also include negotiations with foreign officials to change regulations, improve access to new markets, customers and conducting research to assess new opportunities.

In the case of Canada, **InfoExport**, the Canadian Trade Commissioner Service addresses market access issues, promotes industrial, economic and scientific cooperation as well as facilitates strategic alliances and investments. The department also handles trade enquiries with respect to fisheries and seafood products and is responsible for business development worldwide.

Similarly, the Australian Department of Fisheries and Forestry actively pursue international trade and market access through establishing scientific-based quarantine policies, provides technical advice and export certification services and enter into negotiations with key trading partners. The Department also participates in multilateral forums, international SPS standard setting programmes and collaborate with portfolio industries and exporters.

Chapter 5

Health and Non -Tariff Policies in Various Countries

This Chapter provides brief a review of trade and tariff policies used by various countries to protect their markets as well as plant and animal health. In other cases they may be used to provide incentives to local industry. The following trade and non-tariff policies are reviewed:

- Technical Barriers to Trade (TBT)
- Health and Food Safety
    - Food Safety and Quality Assurance
    - Sanitary and Phytosanitary Measures (SPS):
    - The FAO/WHO Codex Alimentarius
    - EU Food Safety Regulations
    - USA Food Safety Regulations
        - *FDA Seafood HACCP Regulations*
        - *USA Public Health Security and Bioterrorism Preparedness and Response Act*
- Canada Health and Safety Regulations
- Japan Health and Safety Regulations
- Non-Governmental Organizations

5.1 Technical Barriers to Trade (TBT)

The WTO administers various non-tariff policies aimed at further opening of world markets. These include the Technical Barriers to Trade (TBT) agreement and Sanitary and Phytosanitary Measures (SPS) agreement. The TBT agreement aims at ensuring that regulations, standards, testing and certification procedures do not create unnecessary barriers to international trade. It recognizes the rights of individual member states to use the standards which they deem appropriate for human, animal or plant health, protection of the environment and consumer interests and to take the necessary measures to ensure their standards are met. However, the TBT agreement encourages countries to use where appropriate, international standards, guidelines and regulations to avoid excessive diversity.

5.2 Health and Food Safety

This section reviews various countries legislation on health and food safety which aims at safeguarding human health from potentially harmful goods entering their respective markets. Specific reference is made to fish and fishery products.

5.2.1 Food Safety and Quality Assurance

The concept of "quantity-oriented" food production guaranteeing the nutrient supply for a nation is changing into one that is internationally "quality-oriented" where commodities, production areas, production chains and brands compete with each other. Consumers in the industrialized countries are also demanding food that is not just economical, but also healthy, tasty, safe and sound with respect to animal welfare and the environment. Thus, competitiveness of food production is already increasingly dependent on reliability, quality, safety and acceptability of production procedures rather than quantity and price. The trend is a movement away from the 'quantity-oriented' markets to ones that are 'quality-oriented' and 'market-driven'.

Quality assurance measures are also now required at each step of the production chain to enable application and verification of control measures. Such a system assures compliance with regulatory and customer requirements while ensuring the quality and safety of food. The systems entail a set of controls implemented and verified by qualified and responsible personnel at each step in the chain (e.g. fishermen, processors, distributors, storage and transport personnel). Governments also have an important role in implementing policy and ensuring compliance as a means of control. **Good Hygiene Practices** (GHPs), **Good Agricultural Practices** (GAPs), **Hazard Analysis and Critical Control Point** (HACCP) systems and HACCP-based systems are varying modes of quality assurance systems.

5.2.2 The FAO/WHO Codex Alimentarius

The joint FAO/WHO and the **Codex Alimentarius Commission** sets the health and safety standards which the WTO refers to in the SPS and TBT agreements. There are also other international organizations and pressure groups which shape the regulatory framework on trade policy and food safety. Other internationally-recognised standards setting bodies include the **International Organisation for Standardisation** (ISO) and the ***Office Internationale des***

Epizooties (OIE). The ISO established two protocols the 9000 scheme on quality requirements for business "dealings" and the 14000 on environmental management of business. The OIE prepares standards for animal health such as the international animal health code and the international aquatic animal health code.

Establishments and/or factory vessels must comply with the health regulations which require HACCP systems, parasites, chemical checks (heavy metals, mercury and nitrogen), microbiology (heat treatment for bivalves, gastropods and microbiological criteria for crustacean and shellfish) and health certification.

The **Codex General Principles of Food Hygiene** outlines the basic rules for hygienic handling, storage, processing, distribution and final preparation along the food production chain. They include requirements for the design of facilities, control of internal plant operations to minimum specifications, maintenance and sanitation, personal hygiene and training of personnel.

5.2.3 Sanitary and Phytosanitary Measures (SPS)

The SPS agreement aims at ensuring that food safety and animal and plant health standards do not create unnecessary barriers to international trade. It recognizes the individual rights of member states to use science-based standards for the protection of human, animal or plant life or health. The standards should not be used arbitrarily as a non-tariff barrier. Member countries are encouraged to use existing international standards, guidelines and recommendations in these processes. The agreement includes provisions on control, inspection and approval procedures. They complement the TBT agreements.

5.2.4 EU Food Safety Regulations

The EU has proposed new regulations which aim to significantly improve their ability to manage the food and feed chain in order to provide safer food and concurrently allow verification of compliance with animal health and animal welfare rules. The existing systems of controls have been streamlined and strengthened and gives the Commission new tools for ensuring high standards of food safety throughout the EU. The regulations were proposed by the Commission in February 2003 (see IP/03/182) and will reinforce the efficiency of control services performed by both Member States and the Commission. They also provide a framework to support developing

countries in meeting EU import requirements and enable the Commission to fund activities that enhance food and feed safety. Final adoption of the Regulation will take place soon and the new laws are intended to become effective January 1, 2006. Table 5.1 outlines the EU Microbiological Criteria for Crustaceans and shellfish.

Table 5.1: EU Microbiological Criteria for Crustaceans and Shellfish

Products	TVC/g	E.col	S. aureus	Salmonella sp.	V. cholerae	V. para	Listeria mono	Additional Analysis	Ref.
Whole Product	n = 5c = 2m = 1.0x10^4M = 1.0x10^5	n = 5c = 1m = 10/gM = 100/g	n = 5c = 2m = 100/gM = 1,000/g	ND / 25g	ND / 25g	-	-	Antibiotic (Only Boiled Shrimp)	Commission Decision 93/51/EEC DOF 1997
Shell or Shucked Product	n = 5c = 2m = 5.0x10^4M = 5.0x10^5								
Crab Meat	n = 5c = 2m = 1.0x10^5M = 1.0x10^6								

Source: Foodmarket Exchange.com at <http://www.foodmarketexchange.com/datacenter/product/seafood/shrimp/detail/dc_pi_sf_shrimp0602_03.htm >

Labeling of Prepackaged Foods: The EU regulations also require that prepackaged food is not described or presented on a label that is false, misleading or deceptive or in a manner that can create an erroneous impression. Further, the labeling should ensure that the purchaser or consumer is not misled or confused[16].

Food Import and Export Inspection and Certification: Officially recognized inspection and certification systems are widely used as a means of food control. The confidence consumers place on the quality (including safety) of their food supply depends in part on their perception as to the effectiveness of food control measures. Inspection can be carried out at any stage in the production and distribution process and should be carried out at the most strategic stage (e.g. control of refrigeration at every stage of the cold chain). The HACCP regulation on seafood is contained in the so-called Seafood Final Rule, "Procedures for the Safe and Sanitary Processing and Importing of Fish and Fishery Products". It requires processors to develop HACCP systems for their operations. Annexes 16, 17, 18 and 19 have an extract of the EU notification to Guyana, Belize, Jamaica and Suriname, respectively and the approval for various companies to export into the European Union. A guide to other EU fisheries legislation is presented in Box 5.1.

[16] Detailed information which are required on the label of prepackaged foods to be exported to the EU can be found at CODEX GENERAL STANDARD FOR THE LABELLING OF PREPACKAGED FOODS. *CODEX STAN 1-1985 (Rev. 1-1991)***http://www.fao.org/DOCREP/005/Y2770E/y2770e02.htm#bm02.**

Box 5.1
Other EU Fisheries Legislation

Fish hygiene
Council Directive 91/493/EEC of 22 July 1991 laying down the health conditions for the production and the placing on the market of fishery products ; Council Directive 95/71/EC of 22 December 1995 amending the Annex to Directive 91/493/EEC laying down the health conditions for the production and the placing on the market of fishery products

Own checks and HACCP
Commission Decision of 20 May 1994 laying down detailed rules for the application of Council Directive 91/493/EEC, as regards own health checks on fishery products

Fishing vessels
Council Directive 92/48/EEC of 16 June 1992 laying down the minimum hygiene rules applicable to fishery products caught on board certain vessels in accordance with Article 3 (1) (a) (i) of Directive 91/493/EEC

Bivalve mollusc controls
Council Directive 91/492/EEC of 15 July 1991 laying down the health conditions for the production and the placing on the market of live bivalve molluscs ; Council Directive 97/61/EC of 20 October 1997 amending the Annex to Directive 91/492/EEC laying down the health conditions for the production and placing on the market of live bivalve molluscs ; Commission Decision of 11 December 1992 approving certain treatments to inhibit the development of pathogenic micro-organisms in bivalve molluscs and marine gastropods ; Commission Decision of 9 April 1997 amending Decision 93/25/EEC approving certain treatments to inhibit the development of pathogenic micro-organisms in bivalve molluscs and marine gastropods ; Council Decision of 14 June 1993 on reference laboratories for the monitoring of marine biotoxins

Certification
Commission Decision of 3 May 1996 establishing health certification of live bivalve molluscs, echinoderms, tunicates and marine gastropods from third countries which are not covered by a specific decision (96/333/EC); Commission Decision of 25 July 1995 establishing health certification for fishery products from third countries which are not yet covered by a specific decision (95/328/EC)

Product standards and testing methods
Commission Decision of 15 December 1992 on the microbiological criteria applicable to the production of cooked crustaceans and molluscan shellfish (93/51/EEC) ; Commission Decision of 19 January 1993 laying down the detailed rules relating to the visual inspection for the purpose of detecting parasites in fishery products (93/140/EEC) ; Commission Decision of 8 March 1995 fixing the total volatile basic nitrogen (TVB-N) limit values for certain categories of fishery products and specifying the analysis methods to be used (95/149/EC)

Heavy metals
Commission Regulation 466/2001 of 8 March 2001 setting maximum levels for certain contaminants in foodstuffs ; Commission Directive 2001/22/EC of 8 March 2001 laying down the sampling methods and the methods of analysis for the official control of the levels of lead, cadmium, mercury and 3-MCPD in foodstuffs

Water quality
Council Directive 98/83/EC of 3 November 1998 on the quality of water intended for human consumption.
Check of water (fishery product establishments); document produced by DG Agriculture Office Veterinary and Phytosanitary Inspection and Control, 1995

Laboratory quality assurance
Council Directive of 9 June 1998 on the inspection and verification of Good Laboratory Practice (GLP) (88/320/EEC) ; Commission Directive 1999/12/EC of 8 March 1999 adapting to technical progress for the second time the Annex to Council Directive 88/320/EEC on the inspection and verification of good laboratory practice (GLP)

5.2.5 USA Health and Food Safety Regulations

On December 18, 1995, The Food and Drug Administration (FDA) published as Final Rule 21 CFR 123, "Procedures for the Safe and Sanitary Processing and Importing of Fish and Fishery Products" that requires processors of fish and fishery products to develop and implement HACCP systems for their operations. The regulation became effective December 18, 1997. The FDA also operates three other specific voluntary programmes directed at seafood, the National Shellfish Sanitation Program (NSSP), the Salmon Control Plan and the Interstate Shellfish Sanitation Conference (ISSC). The United States enforces the HACCP system on all imported fishery product.

5.2.5.1 FDA Seafood HACCP Regulations

The regulations for the Safe and Sanitary Processing and Importing of Fish and Fishery Products (21 CFR part 123) require that all seafood products (imported and domestic) in interstate commerce in the USA must have been processed in accordance with HACCP principles and the sanitation requirements that are specified in those regulations. Importers have a responsibility under those regulations to verify that imported fish and fish products meet those requirements. This is done by ensuring exporting countries have equivalence or compliance agreement with the FDA that ensures operation of a satisfactory regulatory system for seafood safety. Additionally, if no such agreement exists within the countries of origin, importers must take their own "affirmative steps" to verify that the products they are importing have been processed in accordance with the regulations (21 CFR part 123.12). Table 5.2 outlines selected standards for fishery products in the USA.

Table 5.2: USA Selected Standards for Fishery Products

(FDA Laws, Regulation and Guidelines Fishery Products 11/96)

Products	TVC/g	E.coli	S. aureus	Salmonella sp.	V. cholerae	V. para	Additional Analysis	Ref.
Frozen Crabmeat	-	3.6 MPN/g	-	ND / 25g	-	-	-	Compliance
Raw Breaded Shrimp	10x10^5	3.6 MPN/g	100/g	ND / 25g	-	-	-	Program
Processed Seafood (none to minimal processing by consumer)	-	ETEC = 10^9/g	< 10^4 MPN/gSET = ND	ND / 25g	ND	10^4/g and ND; Kanagawa	V. vulnificus, L. monocytogenes = NDC. botulinum spore-toxin type "E" = ND	7303.842
All fish	-	-	< 10^4 MPN/gSET = ND	ND / 25g	-	-	-	Sec. 555.300 Compliance Policy Guide
Clam, Oyster, Mussel, Fresh, Frozen - Import	5x10^5/g	230 MPN/100g	-	-	-	-	-	-

Source: Foodmarket Exchange.com at
<http://www.foodmarketexchange.com/datacenter/product/seafood/shrimp/detail/dc_pi_sf_shrimp0602_03.htm >

5.2.5.2 USA Public Health Security and Bioterrorism Preparedness and Response Act

Two new FDA safety and security regulations have been enacted by the USA to enable better monitoring and inspection of imported foods. The system is designed to allow quick identification and notification of food processors and other establishments involved in any deliberate or accidental contamination of food. The two new regulations under the **Public Health Security and Bioterrorism Preparedness and Response Act of 2002** gives the FDA new authority to protect the nation's food supply against actual or threatened terrorist acts and other food-related emergencies effective December 12, 2003.

The first regulation requires food importers to provide the FDA with advance notice of human and animal food shipments imported or offered for import. This will allow the FDA to know in advance when specific food shipments will be arriving at U.S. ports of entry and their contents. The second regulation requires domestic and foreign food facilities that manufacture, process, pack or hold food for human or animal consumption in the United States to register with the

agency. Further, prior notice of imported foods must be received and confirmed electronically by FDA no more than five days before its arrival and no fewer than:

- two hours before arrival by land via road;
- four hours before arrival by air or by land via rail; or
- eight hours before arrival by water.

In the case of foreign facilities, the registration must include the name of the U.S. agent for the facility. Except where there are specific exemptions, the registration requirements apply to all facilities that manufacture, process, pack or hold food regulated by FDA, including animal feed, dietary supplements, infant formula, beverages (including alcoholic beverages) and food additives.

5.2.6 Canada Health and Food Safety Regulations

Fish, seafood and production falls under the responsibility of the Canadian Food Inspection Agency Animal Products Directorate, Fish, seafood and production division and can be found on the internet at < **http://www.inspection.gc.ca/english/anima/fispoi/fispoie.shtml >.** There are a number manuals / codes of practice relevant to fisheries namely:

- Canadian Shellfish Sanitation Program - Manual of Operations
- Chemical Methods Manual
- Facilities Inspection Manual
- Fish Products Inspection Manual - Policies and Procedures
- Fish Products Standards and Methods Manual
- Flexible Retort Pouch Defects Manual
- Metal Can Defects Manual
- Standard Procedures for Bacteriological Analysis Manual
- Visual Inspection Protocol

Under Section 4 of the Canadian **Regulatory Action Point (RAP),** Plan the minimum requirements stipulate that processors must establish, document and apply controls that ensure that the final product meets the requirements of the **Fish Inspection Regulations**. Processors

must also ensure that all packaging material must be new, sound and clean. All ingredients must also be acceptable for food use.

This RAP Plan includes controls to ensure that:

(a) the fish is handled properly during processing and results in a final product that is untainted, decomposed or unwholesome

(b) any ingredients added to the fish product or packaging material used are acceptable for food and meet all regulatory requirements; and

(c) the labeling and coding of all fish products are not false, misleading or deceptive.

Fish and fish products imported into Canada are inspected[17] to prevent the marketing of unsafe or unwholesome or mislabeled products. Inspection effort is directed at foreign processors who have demonstrated a history of poor compliance to Canadian standards. Inspection effort can be reduced through the establishment of Memoranda of Understanding (MOUs) or Mutual Recognition Agreements (MRAs) with other countries having reliable inspection systems.

Importers are required to obtain an import license issued by the Canadian Food Inspection Agency (CFIA) before importing fish products. The Fish Import License costs $500 per year valid for 12 months. The import license fee for the Shared or Enhanced QMPI[18] is $5,000 per year, valid for 12 months. All importers must notify the CFIA upon importation of all fish products into Canada within 48 hours of the arrival of the shipment. Products imported for further processing will not be inspected by the CFIA for standard tests under the import inspection program. Fish imported into Canada must not be unwholesome and host bacteria of public health

[17] **Control Points**: The following seven control points will be monitored by the importer to ensure compliance with Canadian regulatory requirements:
A. Licensing And Notification
B. Labelling, Ingredients, Packaging Materials
C. Process Controls For Canned And Ready-To-Eat Products
D. Cold Storage
E. Final Products
F. Recall System
G. Complaints

[18] **Quality Management Program for Importers**: In the labeling activity, there are other challenges related to the control of imported food products which arise because other countries often have different standards for manufacturing, processing, and re-work of ingredients. The Agency has placed **"A Good Import Practices Protocol"** on its website to encourage importers to review their labels for allergens. The CFIA has dealt with the concern over imported products through a variety of strategies. These include, for example, letters to importers, working with embassies, the Quality Management Program for Importers (QMPI) initiative and monitoring of products on the history of enforcement action (alerts, complaints, non-compliant labels, etc., for federally registered products). (Source: Food Program. <http://www.hc-sc.gc.ca/food-aliment/fsa-esa/allergen_paper/e_allergen_paper-08.html>)

significance or substances toxic to humans. Tests will be conducted to ensure that indicator organisms do not exceed regulatory guidelines and that products are free from pathogenic organisms. This would include evaluations for *E. coli, Listeria monocytogenes, Staphylococcus aureus* and salmonella species.

Inspection Service Fee: Fees are charged for imported products based on the declared weight.

Tracability: Records that details the company systems and information must be kept to allow for tracability. This requirement is mandatory for all importers and must be maintained by the importer in Canada for a period of 3 years. Further, importers are required to maintain records of distribution to the first point of sale and also keep records of all complaints received, evaluations conducted and any actions taken as a result of the complaint.

Documentation must precede or accompany the first shipment from each processor and a copy maintained in Canada by the importer in the case of **canned** and **ready-to-eat** fish. Documentation must be available to the importer and to CFIA on request for subsequent shipments. The documentation must show processing and packaging specifications.

Import Prohibitions: Fresh and/or frozen oysters, clams, mussels and other bivalve molluscs (except scallop meats) are not permitted entry except those which have sanitary control programs that have been approved by the CFIA. Import of any species of puffer fish of the family Tetraodontidae or live freshwater mitten crab of the genus Eriocheir is also prohibited.

Requirements Monitored by Specialised Analyses

Specialized analyses are performed to determine compliance with health and safety requirements. The analyses are performed an all shipments of new products and those on the Import Alert List. In all other cases, analyses are conducted at prescribed frequencies between 5% and 15%.

Chemical Contaminants: Fish products are tested to verify that chemical contaminants do not exceed Canadian guidelines. This includes environmental contaminants such as mercury (0.5 ppm), polychlorinated biphenyls (2 ppm) and DDT and derivatives (5 ppm). The levels of therapeutic agents in aquacultured fish products must not exceed Canadian guidelines.

Natural Toxins: Naturally occurring biological toxins such as histamines, paralytic toxins, domoic acid and ciguatera toxin must not exceed Canadian tolerances.

5.2.7 Japan Health and Safety Regulations

The Ministry of Health, Labour and Welfare is the agency responsible for fish import control measures in Japan. The laws that control fishery imports into Japan include:

- Food Sanitation Law
- Standardization and Proper Labeling of Agricultural and Forestry Products controlled by Japanese Agricultural Standards, JAS.

Import Control Method

Public Health Department officials inspect and certify imported products while in bond. The process takes 6-10 days to finish and products that failed to pass inspections are to be returned to its country of origin. In cases where products are contaminated by fatal diseases, it is destroyed. Further, local public health officials may draw samples from retail store shelves for further testing in addition to custom inspections and are authorized to recall products from retail outlets.

Japan has also developed and improved systems in food safety and quality by introducing Pre-Certification System. In addition to sharing many common characteristics with HACCP, the system focuses on product hygiene.

5.2.8 Other National Level Health and Safety Institutions

There is also health and safety institutions at the national level in other countries and exporters should find out what are the specific requirements / standards existing in various countries before shipment. Box 5.2 lists some of the responsible' institutions / legislations in other selected countries.

Health and Safety Institutions – Selected Countries
Box 5.2

Argentina: Servicio Nacional de Sanidad y Calidad Agroalimentaria (SENASA) ;
Administración Nacional de Medicamentos, Alimentos y Tecnologia Medica (ANMAT)
Instituto Nacional Alimenticio (INAL)

Australia and New Zealand: Food Standards Australia New Zealand (FSANZ)

Chile: Health and safety legislation

Mexico: Secretaria de Medio Ambiente y Recursos Naturales (in Spanish)

Source: Health and safety- the national level
http://members.globefish.org/membersonly/rulesandregs/health%20and%20safety/national/hsnat.htm

5.2.9 Non Governmental Organizations

There are a number of Non Governmental Organizations (NGOs) that influences trade policy and health and food safety issues as listed in Box 5.3. Cognizance must be given to these organizations and their policies.

Non Governmental Organisations –
Trade Policy and Health/Safety
Box 5.3

(i) Consumers International: Founded in 1960, It is a world-wide federation of consumers organisations, aimed at protecting and promoting consumers interests.

(ii) Friends of the Earth International: It is a large federation of environmental groups established in 1971. It campaigns include those on Climate Change, Trade and Environment, GMOs.

(iii) Global Aquaculture Alliance: It is an international, not for profit trade association aimed at developing sustainable aquaculture.

(iv) Greenpeace International: One of the best known environmental NGOs world-wide, it launched several campaigns based on advocacy and activism.

(v) International Association for Food Protection: Established in 1911, it is a not-for profit association of food safety professionals informing the public on the latest scientific and technical developments in food safety.

(vi) International Association of Fish Inspectors (IAFI): This association promotes information exchange and co-operation among individuals, organisations, and governments. It was founded in 1997, its vision consisting in "fish, seafood and associated products that are safe, of acceptable quality and readily available for sale in the world's marketplaces".

(vii) International Association of Food Industry Suppliers (IAFIS): It is a global trade association of more than 600 member supplying the food, dairy, beverage and related sanitary processing industries.

(viii) International Coalition of Fisheries Association (ICFA) It is a federation of fishery trade groups of the main fishing nations of the world, formed in 1988. Its objective is to conserve the oceans as a major source of food for people.

(ix) International Collective in Support of Fishworkers (ICSF): It is an NGO advocating the interests of fish workers, particularly the small scale ones. It was established in 1984, as an outcome of the International Conference of Fish workers and Their Supporters.

(x) International Co-operative Fisheries Organisation (ICFO): Founded in 1966, it is a specialised organisation of the International Co-operative Alliance, representing the interests of fishery co-operatives.

(xi) International Federation of Organic Agriculture Movements (IFOAM): It is the international standard-setting institution for organic farming, including aquaculture.

(xii) International Fishmeal and Fish Oil Organisation (IFFO): This organisation advocates the interests of fishmeal and oil manufacturers, promotes studies and research activities.

(xiii) Marine Stewardship Council (MSC): This organisation, founded by Unilever and WWF in 1997, allows its sustainability certification to those fisheries achieving high environmental and social objectives in compliance with international, national and local legislation.

(xiv) TRAFFIC: Established in 1976 by WWF and the World Conservation Union (IUCN), TRAFFIC is a wildlife trade monitoring programme co-operating with the Secretariat of the CITES Convention.

(xv) World Forum of Fish Harvesters and Fish Workers: The World Forum, established in 1995, promotes sustainable fishing and conservation of fisheries resources and aquatic ecosystems.

(xvi) World Wide Fund for Nature (WWF) International

(xvii) It is a global environmental organisation that has been launching campaigns on climate change, endangered seas, living waters and species.

Source: Non Governmental Organisations (NGOs) dealing with trade policy and health/safety **issues** http://members.globefish.org/membersonly/rulesandregs/trade%20policy/global/other%20international/orgs.htm

Chapter 6

Overview of CARICOM Fishing Industry

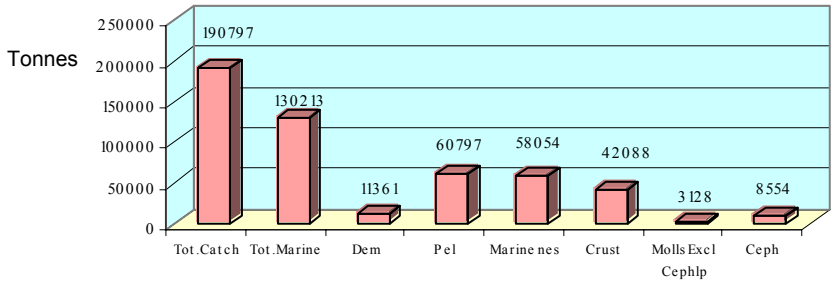
This Chapter reviews CARICOM's production and trade in fishery products. The review includesIt is presented in five major sections:

- Major Fisheries catch/production
- Major Exporters and Importers and
- Tariffs, Incentives and Support

6.1 Major Fisheries – Catch and Production

Total fishery catch averaged 190,797 tonnes and total marine catch was estimated at 130,213 tonnes during the 1999-01 period. Fish production classified under the pelagic group was 60,797 tonnes while demersals was 11,361 tonnes. Marine fish nes comprised 58,054 tonnes, crustaceans comprised 42,088 tonnes, mollusks 3,128 tonnes and cephalopods 8,544 tonnes of total marine production (Figure 6.1). Marine fish and crustaceans comprised CARICOM's largest export grouping.

Figure 6.1: CARICOM Fisheries Production - By Species (1999-01 Av)



Data Source: FAOStat Database

Guyana produced 26% (31,921 tonnes) of CARICOM's total marine fish production, followed by St Vincent 23% (29,770 tonnes) and Belize 22% (28,869 tonnes). The other major producers

were Suriname 8% (10,533 tonnes) and Trinidad and Tobago 7% (9,156 tonnes) as presented in Figure 6.2 and 6.3 and Table 6.1).

FAO estimates the pelagic production at 60,797 tonnes (Table 7.1). The largest producers were Belize (21,335 tonnes) and St Vincent (28,288 tonnes). Belize and Trinidad and Tobago were the largest demersal marine fish producers at 3,726 tonnes and 2,927 tonnes respectively, out of a total 11,361 tonnes.

Guyana and Suriname produced 29,954 tonnes and 9,293 tonnes respectively from a total 58,054 tonnes marine fish nes. Crustacean production, the next highest group was 42,088 tonnes; largest producers were Guyana (19,522 tonnes), Bahamas (8,150 tonnes), Belize (5,147 tonnes) and Suriname (7,049 tonnes).

6.2 Major Exporters and Importers

This sub section reviews the CARICOM's fishery trade. First the exports are examined followed by imports into the Region. The Harmonized System[19] classification is used to analyse the fishery trade in detail.

6.2.1 Exports

The major CARICOM exporters over the period 1999-2001 are The Bahamas, USD 83.01 mn, Suriname USD 39.0 mn, Belize USD 28 mn followed by Guyana USD 28 mn and Jamaica USD 13 mn of total CARICOM exports of USD 294 mn.

The average fishery exports to the USA, EU and Canada during the period 2000-02 was estimated at USD 294.3 mn. During the period, 68% of value exports went to the USA, 28% went to the EU and 4% to Canada.

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19 Chapter 3 - Fish, Crustaceans, Mollusks and other Aquatic Invertebrates

0301	Live Fish
0302	Fish, Fresh or Chilled, Excluding Fish Fillets
0303	Fish, Frozen, Excluding Fish Fillets and Other Fish
0304	Fish Fillets and Other Fish Meat Fresh, Chilled or Frozen
0305	Fish, Dried, Salted or in Brine; Smoked Fish
0306	Crustaceans, Whether in Shell or Not, Fresh, Chilled or Frozen
0307	Mollusks, Whether in Shell or Not, Live, Fresh, Chilled or Frozen

Source: Major Product Categories in the Harmonized System. Fas Online. http://www.fas.usda.gov/itp/wto/categories.html

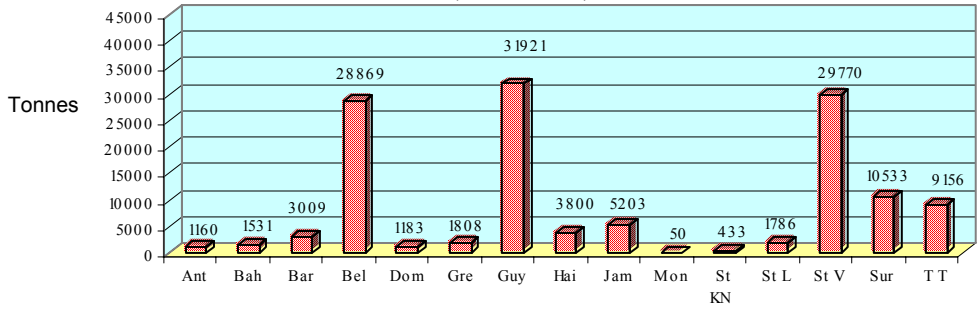
HS 0306 Crustaceans recorded the highest value exported at USD 199.4 mn. This was followed by **HS 0302 fresh / chilled fish** valued at USD 47.8 mn and **HS 0303 frozen fish and fishery products** at USD 28.2 mn. Exports of **HS 0307 mollusks** was valued at USD 10.5 mn (Figure 6.4 and Table 6.2).

Exports to the USA was dominated by **HS 0306 Crustaceans** valued at USD 138.8 mn, followed **by HS 0302 Fresh / Chilled** at USD 42.7 mn, HS 0303 at USD 10.1 mn (Figure 6.5 and Table 6.2). A detailed listing of fishery exports to the USA is presented in Annex 20.

Exports to the EU was dominated by **HS 0306 Crustaceans** valued at USD 53.8 mn, followed by **HS 0303** at USD 16.7 mn and **HS 0307 Mollusks** at USD 5.8 mn (Figure 6.6 and Table 6.2).

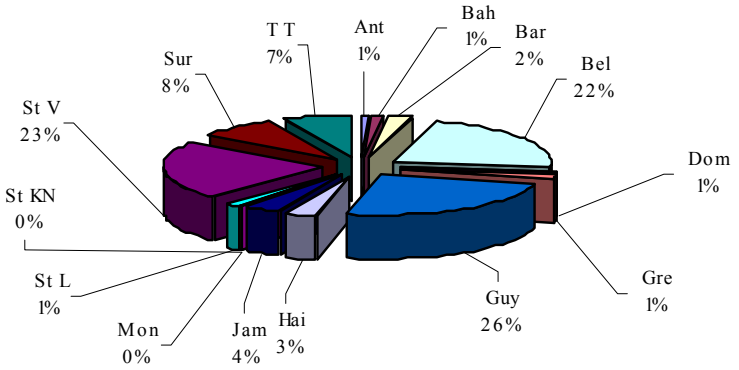
Exports to the Canada was dominated by HS 0306 crustaceans valued at USD 6.8 mn, followed by HS 0302 fresh / chilled at USD 2.8 mn and HS 0303 frozen fish at USD 1.4 mn (Figure 6.7 and Table 6.2). A detailed listing of fishery exports to Canada is presented in Annex 21.

Figure 6.2: CARICOM Fishery Production - Member Countries (1999-01 Av)



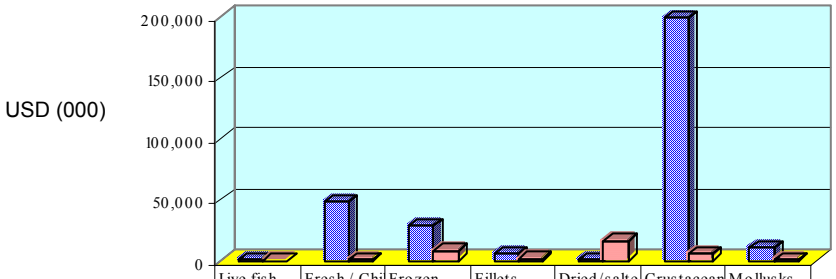
Data Source: FAOStat Database

Figure 6.3: CARICOM Total Marine Fish Production Share (1999-01 Av)



Data Source: FAOStat Database

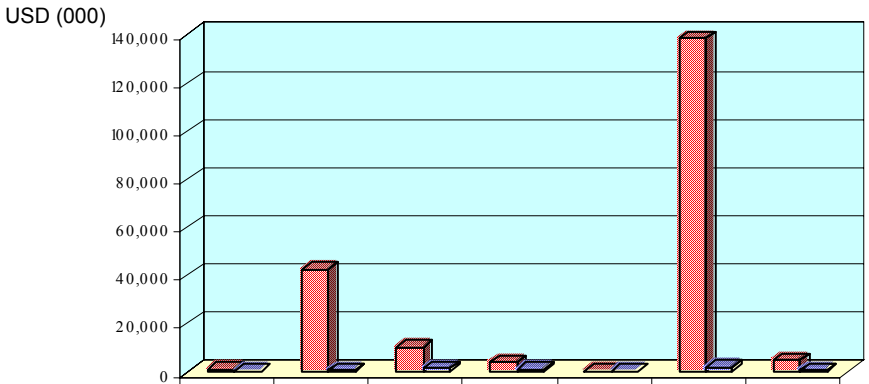
Figure 6.4: CARICOM Fishery Trade with the USA, Canada and EU (2000-02 Av.)



	Live fish 301	Fresh / Chi 302	Frozen 303	Fillets 304	Dried/salte 305	Crustacean 306	Mollusks 307
Exports	973	47,824	28,202	5,980	1,398	199,415	10,531
Imports	26	569	8,332	1,633	16,403	5,269	686

Data Source: Europa, Hemispheric Database

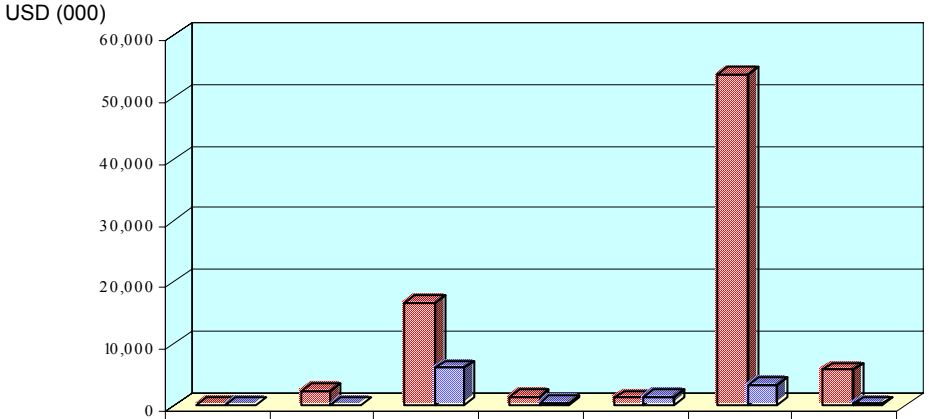
Figure 6.5: CARICOM Fishery Trade with USA (1999-10 Av)



	Live fish 301	Fresh / Chill 302	Frozen 303	Fillets 304	Dried/salted 305	Crustaceans 306	Mollusks 307
Export	803	42,697	10,087	3,971	53	138,770	4,671
Import	21	420	1,287	1,049	118	1,911	407

Data Source: Hemispheric Database

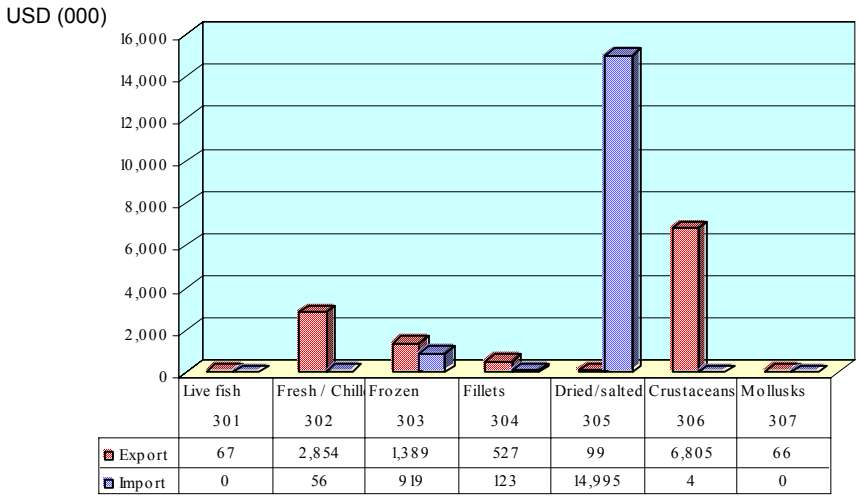
Figure 6.6: CARICOM Summary Trade with EU (2000-02 Av)



	Live fish 301	Fresh / Chilled 302	Frozen 303	Fillets 304	Dried/ salted/ smok 305	Crustaceans 306	Mollusks 307
Export	102	2,274	16,726	1,483	1,246	53,841	5,795
Import	5	94	6,127	462	1,291	3,355	279

Source: EUROPA Statistical Tradeflow Database <http://mkaccdb.eu.int/cgi-bin/stb/stat/comext.pl?action=search >

Figure 6.7: CARICOM Fishery Trade with Canada (1999-01 Av)



	Live fish 301	Fresh / Chill 302	Frozen 303	Fillets 304	Dried/salted 305	Crustaceans 306	Mollusks 307
Export	67	2,854	1,389	527	99	6,805	66
Import	0	56	919	123	14,995	4	0

Data Source: Hemispheric Database

Table 6.1 Total Marine Fish Production (1999-2001 Av)

Country	Total Marine Production (Mt)	Classification			Sub Classification		
		Demersal Marine	Pelagic	Marine nes	Crustaceans	Mollusks Excluding Cephalopods	Cephalopods
Antigua	1,160	379	24	757	274	42	-
Bahamas	1,531	1317	87	127	8150	600	-
Barbados	3,009	34	2894	80	0	-	-
Belize	28,869	3726	21335	3808	5147	1592	7944
Dominica	1,183	-	300	883	4	-	-
Grenada	1,808	216	1578	15	52	3	2
Guyana	31,921	1090	877	29954	19552	-	-
Haiti	3,800	-		3800	400	300	-
Jamaica	5,203	-	55	5148	526	458	-
Montserrat	50	-	-	50	-	-	-
St .Kitts	433	40	169	225	37	81	-
St. Lucia	1,786	70	1345	371	30	35	-
St. Vincent	29,770	322	28288	1159	22	17	602
Suriname	10,533	1240		9293	7049	-	-
Trinidad and Tobago	9,156	2927	3845	2384	845	-	6
Total	**130213**	**11361**	**60797**	**58054**	**42088**	**3128**	**8554**

Data Source: FAO FishStat Database

Table 6.2: CARICOM Summary of Trade with EU, Canada and USA – Fish (2000 – 2002 Average (USD)

HS Code	Description	USA**		EU*		Canada**		Total Export	Total Import
		Export	Import	Export	Import	Export	Import		
0301	Live fish	803,333	21,000	102418	5387	67333	0	973,084	26,387
0302	Fresh / Chilled	42,697,333	419,500	2273626	94487	2853667	55667	47,824,626	569,653
0303	Frozen	10,087,333	1,287,000	16726193	6126981	1389000	919000	28,202,526	8,332,981
0304	Fillets	3,971,000	1,049,000	1482635	461552	527333	122667	5,980,968	1,633,219
0305	Dried/salted /smoke	53,000	118,000	1246391	1290726	99000	14995000	1,398,391	16,403,726
0306	Crustaceans	138,769,667	1,911,000	53840889	3354802	6805000	3667	199,415,556	5,269,469
0307	Mollusks	4,671,333	407,000	5794940	279001	65667	0	10,531,940	686,001
	Total	201,053,000	5,212,500	81467092	11612934	11807000	16096000	294,327,092	32,921,434

Data Source: *Europa Market Access Database; **Hemispheric Database

CARICOM's export of fishery products was less than 1% of total world exports. Exports of rock lobster to the USA for example over 1999-01 was an estimated 0.2%, yellow fin tuna 0.01% and shrimps 0.01% of total world exports respectively. Values of exports of selected species can present in Table 6.3.

Table: 6.3: CARICOM Major Fishery Exports Compared to Total World Export

HS Code	Description	Exports		
		Average 1999-01		
		CARICOM Export to USA[1/]	CARICOM Export to Canada[2/]	Total World Exports[3/]
		USD (1000)	USD (1000)	USD (1000)
30232	Yellowfin Tunas (Thunnus Albacares)	18,268	10	191,611
030239	Other	12,513	831	360,106
030269	Other	11,829	1,686	1,812,183
030341	Albacore or Longfinned Tunas (Thunnus Alalunga)	7,091	0	261,918
030611	Rock Lobster and other Sea Crawfish (Palinurus Spp., Panulirus Spp., Jasus Spp.)	63,427	5,705	293,784
030612	Lobsters (Homarus Spp.)	479	0	286,198
030613	Shrimps and Prawns	72,628	819.7	8,087,364
	Total Fishery Exports	**201,053**	**11,807**	**55,864,537**

Data Source: [1 & 2]Hemispheric Database [3]Europa Market Access Database

6.2.2 Imports

The Region imported USD 32.9 mn of fish and fishery products from the USA, EU and Canada. During 2002, USD 16.4 mn **HS 0305 Dried / salted / smoked fish** was imported, of which USD 15.0 mn was imported from Canada.

The next major commodity imported was **HS 0303 Frozen Fish**, valued at USD 8.3 mn of which USD 6.9 mn was imported from the EU. **Crustaceans (HS 0306)** imports was also significant, valued at USD 5.3 mn, originating largely from the EU (USD 3.4 mn) and USA (USD 1.9mn), as presented in Table 6.2.

6.3 Major Tariffs, Incentives and Support in CARICOM

These are discussed in Chapters 4 and 5 and further elaborated in Chapter 7.

Chapter 7

Summary of Major Findings, Elaboration and Conclusions

In this chapter, we list the major findings and also review some of the critical issues impacting on development of the fisheries sector including fisheries trade policies. It also incorporates details and projects that we recommend for addressing some of the current constraints for fishery development in the Region.

This preliminary research has sought to start the process of a full and comprehensive assessment of the potential role and contribution of the fishery resource to Caribbean Development that lies within the fishing zones of the CARICOM/CARIFORUM countries, especially those that (i) have already established their exclusive economic zones (EEZs), (ii) are participating in the current conventions that guide fishery trade liberalization agreements and (iii) who are also members of the World Trade Organisation.

This preliminary analysis sought to locate CARICOM / CARIFORUM fishery within the context of globalization and trade liberalization and some of the emerging issues that are likely to impact on the sector. Some of the issues raised call for deeper and more rigorous analysis using empirical econometric models with substantial data. Notwithstanding this, we have identified some fundamental issues that in our opinion, warrant urgent attention if, indeed, the operatives within the fishery sector (i) will be able to withstand the challenges arising from international forces of globalization and (ii) benefit from the advantages posed by trade liberalization.

The study was designed to identify critical issues that are likely to constrain the development of the Region's fishery resource, record the major elements of the international trade agreements and analyse their potential impact on exploitation of the Region's fisheries resource. Development of a strategy and project to prepare the Region for trade negotiations on one hand and also to manage the fishery so that the member countries can maximize the benefit from greater utilization were also required.

In order to achieve these objectives, we first developed a very simple methodology which involved inter alia, desk research on databases, regulatory framework policies and international agreements that impact on the fishery. This was supported by collection of primary data through

visits to the major fishing centres of the Region as well as discussions with industry stakeholders and participants to identify current and potedntial operational constraints to the fishing effort. We also analysed the synergies and differences between and among the trade agreements that impact on the fishery.

The study then examined specific health and safety regulatory measures as preconditions for market entry, including infrastructure that facilitates supply. Next we reviewed the status of CARICOM fishery in terms of production pattern and trade in major species. This was followed by a brief presentation of trade policies and mechanisms as they relate to fishery in the Region. Our analyses of the foregoing body of information and data on the current status of this fishery resource led us to an identification of a specific project proposal which, if implemented will provide the foundation for the development of the Region's fishery sector. But before we elaborate on the project proposal, we wish to report on some of the major findings of the study. Some of these are also listed in Part B of the report, the country profiles.

7.1 Major Findings

- **Overview of the Global Fishery:** Total world catch averaged 129 million tonnes during the 1995 to 2001 and was dominated by pelagic, fresh water diadrom and demersal. Major species were mollusks, crustaceans' ad cephalopods. These came mainly from the Pacific, Atlantic and Indian Oceans.

  Trends in exports increased significantly between 1999 and 2001 and were dominated by a mixed group of countries such as Thailand, China, Norway, USA, Chile, Canada, Spain and Vietnam. Leading exporting countries were from a similar grouping, but were led by Japan followed by the USA. It was estimated that 39% of the fish produced in 2002 was marketed fresh for human consumption, 20% frozen, 9% canned and 8% cured. An estimated 24% was processed into animal feed and oils.

  Global per capita consumption of fish was predicted to increase from 16 kg in 2002 to 20 kg in 2030. This increase is expected to occur mainly in South Asia by 62%, Latin America and the Caribbean by 50% and China by 84%. FAO studies indicate a world average per capita consumption of 19-20 kg, a reduction from 22 kg that was previously known.

The literature projects increasing net exports from China, Latin America and the Caribbean and declines for the rest of Asia and North America. Sardines, herrings and anchovies were the most produced species followed by tunas, bonitos and billfishes. World mollusks production averaged 14.9 million tonnes and was dominated by China followed by Japan. Salmon, trouts and smelts averaged 2.4 million tonnes in the same year. Leading producers were Norway (19%), USA (16%) and Chile (15%).

World production of shrimps and prawns averaged 4.1 million tonnes over the period 1999-01; leading producers were China, India and Indonesia. The Black Tiger shrimp was the major specie farmed. Other species farmed include the Pacific White and the Chinese White.

Tunas, bonitos and billfishes production averaged 6.0 million tonnes. The major producers were China, Indonesia and Japan. With respect to crustaceans, world production averaged 8.0 tonnes with China being the major producer followed by India and Indonesia in that order.

- **Treaties and International Trade Agreements**

There are three treaties and arrangements that impact on the global and regional fishery sectors – the UNCLOS, the FAO Code of Conduct for Responsible Fishing and CITES.

The Law of the Sea' came into force in 1994 recognizing the sovereignty of all states and promotes the peaceful uses of the high seas. It also stresses the equitable and efficient utilization and conservation of these resources. It adopts the principle that the area of the seabed and the ocean floor are the common heritage of mankind. This law outlays the basis in which the EEZ was established.

The FAO Code of Conduct for Responsible Fishing was adopted in 1995 and highlights appropriate management practices for the exploitation of fish resources. It also seeks to ensure consumer rights to safe, wholesome and unadulterated fish products. It stresses on conservation and the utilization of by-catch.

CITES seeks to prevent depletion and possible extinction of biological resources including fisheries. It seeks to limit the trade of endangered species as the main tool to effect such a strategy.

The WTO: The WTO agreement and the respective trade agreements contained therein is the premier membership institution that guides global trade. Participating members are expected to eliminate trade distorting practices by way of successive rounds of agreements. Subsidies and other trade distorting practices including TBT, non-technical barriers to trade such as licensing and negative lists are to be rationalized. With respect to fisheries, there is an agreement among 140 nations to include fisheries policies on the WTO 2 agenda. Some of the arguments advanced include trade distorting role of subsidies, the impact of governments their ability to regulate its own fishery, the negative impact of over-fishing, the impact on small itinerant fishers, the open access and freedom to exploit fishery resources in the EEZ's of various countries by foreign investors. These factors, it is believed will lead to rapid depletion of fishery resources in countries such as those in the Caribbean. The possible surge of imports and other seafood products into the domestic market is likely to threaten market share of local fishers and itinerant traders who mostly land by-catch for domestic consumption and thus local market will be threatened. Concerns for the domination of multinational firms over small powerless states in the Caribbean have also been expressed.

The FTAA: The FTAA trade block which includes 34 countries (excluding Cuba) was conceived at the Second Summit of the Americas in Miami, USA in 1994 and negotiations began four years later. It showed in the main that WTO compliance and its operations should reflect the difference in the levels of development and size of constituent members. Negotiations should lead to improvements in the working conditions of people and protection for the environment.

The agreement calls for the elimination of agricultural export subsidies that serve to distort trade. Although it has not yet come into force, several issues have already been raised. These include reservations by the governments of its rights to impose performance requirements on investors. In the main, food and nutrition security, equity in treatment fore all investors, local or foreign, have been questioning the proposed policy to limit fisheries to local citizens and restricting foreign investors from the ownership of domestic utilities.

The CSME : The CSME comprising a market of about 14 million people is a regional trade block which allows for the complete waiver of import duties on all CARICOM produced goods, while A CET is imposed on goods from third countries. It is carded to come on stream in 2005. it is expected to provide opportunities to boost regional trade,

strengthen regional alliances and similarities in the treatment of business services. Although yet to function, reservations have also been expressed e.g., the threat to stability in certain economies, the impact of adverse macroeconomic policies coming from certain countries and the provision of free access to specified human resources through the one way flow of both people and capital.

Other Trade Agreements: CARICOM countries are also signatories to both unilateral and bilateral agreements with the major ones being the EU, Cuba, Costa Rica, Venezuela, the Dominican Republic and Colombia. The CARIBCAN and CBI arrangements also fall into this category. These arrangements set out specific conditionalities under which a free trade regime will be applied to selected goods and services including fisheries.

There are however, exclusion clauses in some cases e.g. the agreement with the Dominican Republic grants rates of duty for specified groups of commodities excluding fishery products. However the Cuban agreement has not yet become operational and some countries and still awaiting Cabinet approval.

- **Trade Policy**

The major elements of trade policy is the application of various forms of tariff on goods and services imported and exported and at the operational level are indeed multifunction. In the main, they are used to stimulate trade or facilitate trade among countries. They are also used to buttress revenue levels in certain countries. The WTO commitment on tariff demand that its institutional members, when applying tariff levels should not exceed the maximum bound rates.

The EU applies a General System of Preference to developing countries to boost export earnings, stimulate industrialization and rates of growth. However, once a developing country has graduated to developed country status, such preferences are no longer granted as in the case of Thailand which lost benefits because of graduation. Currently non-ACP countries benefit from a margin of preference under the Cotonou agreement. Non-ACP fisheries exporters of canned tuna faces a 22% import tariff, fish fillets 18% and 15% for some species, and around 12% for shrimp and prawns. These are likely to be removed if fishery arrives successfully the WTO table. Thus ACP exporters will have to compete with non-ACP exporters at prices that are 12%-22% lower. This has

implications for both profitability of investments and the relative competitiveness of ACP suppliers.

Similarly, the implications for the Region can be far reaching if domestic import tariffs are rapidly lowered (also a consequence of the WTO). We should not forget the unprecedented disruption in the livelihood of banana and sugar exporting of the Region. Given the disadvantaged position faced by Caribbean negotiators, this makes it virtually impossible to successfully argue the case for (i) the non-appearance of the fishery sector on the negotiating table and (ii) the argument for special treatment under the WTO protocol.

If tariffs are lowered, significant amounts of revenues will be lost in certain countries. Alternatively, the potential surge in imports while adding to the increase in availability of fish and fish products in the short run, in the longer term the impact can be more far reaching. It is possible that the domestic market share would be challenged from the possible increase of the flow of fishery products in the region thus leading to perhaps unprecedented decrease in the local fish supply in the marketplace. Such was the experience of Sri Lanka. The consequent loss of profitability will drive away current and future investments in the sector and subsequently loss of employment and livelihood to those individual and communities that depend on fishery for survival. This we argue will weaken the postulation that the sector could provide an additional platform for the Region's development thus reducing the burden on land based resources. Given the lack of investment opportunities in other sectors of the regional economy, it is likely that this capital may be diverted or directed elsewhere. High technology and capital intensive foreign fleets are likely to seize these opportunities and will crowd out those local investors who could possibly attempt the competitive challenges that are likely to develop.

Fish and fish products currently enjoy relatively free movement between CARICOM member states. The Common External Tariff (CET) is used to guide trade among constituent members of the PTA grouping while third countries are subjected to national border control regimes. In many of the thirteen member countries, the tax regimes cater for additional charges on the movement of fish products. These include consumption tax, customer surcharge and value added tax (VAT). Environmental tax, stamp duty and licensing also fall into this category. The overall tariff regime for fish is considered

discriminatory because while fresh fish can enter most Caribbean countries free of duty, fishery value added products attract varying rates of duty and could frustrate trade in these products.

The trade policy regime in CARICOM states also provides for some incentive and support for the fishing effort. Some of these are currently viewed as 'subsidies' and deemed trade distorting and there have been calls for their removal even before the commodity is placed squarely on the WTO negotiating table. Some subsidies are deemed cost recovery, and others are income and price supporting.

Technological developments have also entered the fishery sector and led to expansion in capacity and other infrastructure. Technical barriers are also used in the administration of non-tariff policies to expand trade opportunities. These include health and food safety regulations and agreements on sanitary and phytosanitary procedures. They set the standards for trade including labeling and are aimed at protecting human health.

Certification processes are also set in the regulations. Processors and exporters of fish products are required to be HACCP compliant. This has resulted in the re-engineering and modernization of machinery, equipment and plant and has impacted negatively in some cases. The exporters must seek approval prior to the arrival of fish products into the EU market.

Exporters of seafood into the USA are subject to regulations specified under the Bioterrorism Preparedness Act. Canadian importers of fish products are also subjected to specific food and health regulations and Japan also conduct its affairs in a similar manner.

It must also be noted here too, that although there is a tendency towards classifying the health and food safety regulations as non-tariff barriers to trade, we must stress the additional benefits to be derived from such requirements in protecting human health. This benefit should not be underestimated. Further, compliance forces the Region to upgrade and modernize its food supply system.

- **CARICOM Fish Production**

  CARICOM total fish catch averaged about 191,000 tonnes during 1990-91 and was dominated by marine fish -- the pelagic group, and demersal. Crustaceans, mollusks and cephalopods were the other major species produced during that period. Production was concentrated in Guyana, St Vincent (preliminary) and Belize.

  The major exporters in the Region in value terms are The Bahamas, Suriname, Belize and Guyana and were dominated by crustaceans, fresh and chilled as well as frozen. The Caribbean is also a major exporter of mollusks but these exports only constitute less than 10% share of total world catch.

- **Management of the Fishery resource**: the exploitation of fishery in the Region is characterized by a wide range of managements systems. In a number of cases, the management and administration was located within the Ministries responsible for agriculture and because of this, there is widespread feeling that the fishery sector is suffering from underdevelopment as the Regions agriculture. The Sector also suffer from hemorrhaging of staff, under financing, multiple and overlapping functions and responsibilities such as drug interdiction tied to fishery surveillance, inadequate surveillance and monitoring resources / equipment.

  It is also recognized that some countries are well endowed with the managerial and technical aspects of the fishery and may be induced to develop creative ways of sharing technical knowledge especially in those countries where the technical capacity is low. Secondment and brief attachment of competent staff from other countries can be utilized to satisfy this deficiency until other technical enhancement programmes come fully on stream. In Belize for example, there seems to be resident a strong technical capacity and capability in the management of 'reef fisheries'. So too, is the case of Suriname, there is a strong technical expertise built up through its affiliation with the European Union.

  We also reported a bias of technical resource in the area of fishery biology. While this may provide the foundation for technical capacity, we believe that fishery technicians should be exposed to areas of training in economics, trade policy and negotiation, business management, marketing and product development. This we believe will also

enhance our call for expansion of the 'commercial basket' to include greater utilization of by-catch of existing species as well as those that are underexploited.

- **State of Preparedness:** From our observations, it was found that the fishery sector was in varying states of technical readiness to deal with issues of globalization. The private sector initiatives were fairly advanced in certain countries in terms of developing the requisite HACCP and SPS infrastructure requirements. But while significant strides were made in the public sector through upgrade of legislations, certification capabilities were found to be proceeding at a slower pace.

- **Strategic Plan:** From the information provided, there appears to be an absence of an overarching strategic plan for the development and exploitation of the Region's fishing resource. Within the limitations of existing resources, focus is placed on individual fishing grounds and specific species such as the Pedro Banks in Jamaica and the Barrier Reef in Belize; grouper and conch in The Bahamas; conch in Jamaica; prawns in Guyana and Suriname. Given the new dimensions emerging in the Region with regards to the frequent onset of natural disasters such as hurricanes, volcanoes and floods and the need to address food, nutrition and livelihood security, such a strategy may no longer be appropriate. The previously neglected allied business activities such as fishery recreation, tourism, fish festivals, berthing for leisure crafts can now be brought into greater focus.

- **Landing Sites**: The Landing Sites examined include some of the major locations at which fishery harvests were brought onshore. These are presented in Table 7.1. On these visits we were accompanied by technical officers from the Departments of Fisheries.

Table 7.1: Landing Sites visited in various Countries

Jamaica	The Bahamas	Belize	Guyana	Suriname
Grenwich Farm, Kingston Wharf	Nassau Bay – various sites	The Belize National Fishermen Co-operative	Various Sites at Georgetown and Houston	Sail
Rae Town Kingston Wharf	Manmade estuarine at the west of New Providence Island	Various landing sites on the Belize River at Belize City	New Mahaicony	Nieuw Amsterdam (various sites)
Port Royal			Rosignol	
			Better Hope	

In general, there were distinct qualitative and functional differences in the infrastructure at these landing sites, some of which would make it difficult for fish supplies to meet required health and food safety standards. This problem is further exacerbated when the landing sites are used for the conduct of a wide range of 'other social activities'. The open access to these facilities by human, animals and itinerant traders (wholesale, retail) as well as the other economic activities (food and drug retail) and dry docking may have added to the management difficulties. The indiscriminate disposal of fishery waste, the poor levels of sanitation at the landing sites, the unpaved surrounding areas and the encroachment of non-fishery waste have served to further impair the environment.

Alternatively, the multifunctional jetties such as those in The Bahamas which are used for tourism, intra-coastal transport and commercial food distribution, were found to be much more developed and of a much higher quality than the single-use facilities. Perhaps the Bahamian model could be used to set the standard.

- **Standard operating procedures:** Where strong fishing cooperatives exist such as exists Belize and Guyana, upgrading of certain facilities have been undertaken partially by these organizations with some assistance from external sources. It is also evident that where there is the presence of a multinational link with the local fishery, the infrastructure is more developed and maintained.

  However, from our discussions with operators at the landing sites, it was found that there was a general lack of standard sanitary operating procedures for the efficient management of the landing sites. This may have contributed to the poor and unsanitary facilities that exist at some sites. Further, public sector responsibility for upgrading and management of the sites has not kept pace with the regulatory and legislative demands in the international marketplace.

- **Monitoring and Surveillance:** The capacity to accurately monitor activities in the fishery varies considerably across the Region. It is common knowledge that the Region's fishery resources are being exploited by foreign fleets (alleged poaching by countries such as British Honduras of the Jamaican fishery; Dominican Republic, USA, Cuba and yacht operators under the guise of recreation in the Bahamas fishery, French Guyana and Guyana in the Suriname fishery). These activities together with inter-fleet transactions

on the high seas make it difficult to collect accurate data on the fishery resource. Use of such data can lead to inaccurate computations of sustainable yields as well as the level of monitoring and surveillance required.

- **Subsidies and Incentives:** The structure of the fisheries is very much akin to what exist in agriculture. There is a large number of small low-technology exploiters at the bottom end of the scale and a small number of high technology, capital intensive operators at the top. Our attempts to obtain detailed cost of the fishing effort in both cases were unsuccessful. However, our discussion revealed high levels of income being generated at the top end of the scale where the activity is highly integrated. This situation in certain countries has led to the suspension of the "perceived subsidies" to fishery exploiters as in The Bahamas. In other countries, the request for subsidy seems critical to the fishing effort.

  Our discussions reveal that there have been continuous requests for a review of the existing incentive / support regime provided to the sector. However, we note that the majority of these provisions apply to the harvesting and production of the fish and very little at the value added segment of the supply chain. Our request for crude estimates of the overall impact of the subsidy with respect of the over-exploitation of the resource remains indeterminate. There is also an apparent lack of clarity of the role and function of an efficient subsidy support regime.

- **The WTO and Fisheries:** There was indeed a general awareness that fisheries is now present on the WTO table and even though there is limited technical information on the impact that this round of negotiations may have on the Region's fishery, some sensitization to the wider issues have already started. Stakeholders have further expressed reservations however, to unrestricted opening of the fishery resource as foreign exploitation and domination could lead to frustration of the Regions effort towards self-development through full utilization of its own resource endowment. It is recognized that the land-based resources is inadequate to sustain the development initiatives of the Region; sea-based resources must therefore play a more strategic role in the provision of food and nutrition security.

- **Food and Nutrition Security:** Our efforts to accurately quantify the contribution of the fishery resource to GDPs remain incomplete, largely due to weaknesses in the database. However, the contribution of the fishery resource to development in the Region, particularly to levels of self employment, income generation and accumulation of wealth as well as contribution to food and nutrition security should not go unrecognized.

The above issues were based on information generated during our consultation with technical, administrative and other stakeholders in the sector. These issues are elaborated further in the next section where we have also proposed some strategies for their resolution.

7.2 Strategies and Projects

The strategies and projects summarized below address the following areas sequentially:

(i) the re-engineering upgrading / transformation and modernization of the landing sites currently in use;
(ii) a comprehensive assessment of the stock of fishery resource that lies within the EEZs and beyond;
(iii) a full assessment of the contribution of the Region's Fishery resource to its food and nutrition security;
(iv) change in the institutional arrangements currently used to manage the Regional fishery resource;
(v) evaluation of the role and contribution of subsidies and other forms of support provided by the State to the fishery sector;
(vi) a comprehensive assessment of the WTO and other trade agreements and implications for fishery development in the Region.

The specific projects proposed below include a rationale and justification for the selection for each component.

(1) Transformation of the Fish Landing Sites

Designated fish landing sites represent key in-country entry points for both inshore and offshore fish harvests and as such they perform key functions in the fish food supply chain; sorting,

grading, packing, marketing and distribution are common activities at these sites. As pointed out earlier in the report, many of the landing sites visited were of varied quality both from an infrastructural and operational standpoint. Many were in a state of disrepair, exhibiting poor physical and structural conditions and lack standard sanitary operations (e.g. Belize City, Belize - those on the rivers; in Guyana; Georgetown Fisheries Cooperative, New Mahaicony, Better Hope and Rosignol; Jamaica – Hunts Bay and other sites in Kingston). Many were also characterized by poor environmental conditions. A wide range of social and non-fish related activities were common at these sites which have contributed to the existing unsanitary conditions. On the other hand, many were of a high standard such as those in Nassau - The Bahamas, the Cooperatives in Belize and Sail and Nieuw Amsterdam in Suriname and Noble House Seafood in Guyana. **Given the critical importance of these sites, it is recommended that detailed technical, operational and management audits be conducted urgently with a view to correcting these deficiencies.** The exercise would be incomplete without the preparation and dissemination and implementation of:

(i) Management Policy and Operational Protocols (MPOP) for efficient code of conduct and to ensure traceability, data collection and recording.

(ii) Sanitation Standard Operating Procedures (SSOP's) to prevent direct contamination or adulteration of fishery products. Water use in processing must be of good quality.

(iii) Strategic / business plans and use of these sites as possible commerce hubs for development of appropriate micro-enterprises with fisheries at the core.

It must also be pointed out that continuous deterioration of the landing sites and failure to maintain and upgrade them quickly will continue to exacerbate the lack of access at markets, especially the European Union. Additionally, this must be done to ensure that harvesting, handling, processing and distribution of fish and fishery products originating at these sites are carried out in a manner that will maintain their nutritional value, quality and safety while minimizing negative impacts on the environment.

(2) Stock / Resource Assessment within the Region

It is widely believed that given the geographical spread of the countries of the CARICOM / CARIFORUM Region together has a wide fishery resource base awaiting exploitation. If this is indeed the case, the potential is there to reduce the Region's dependency on the land based resources for its development. Our efforts to obtain some crude estimates of the quality and

quantity of the fishery resource base were unsuccessful. It is either that this database has not yet been fully established through scientific study or the information awaits arrival in the public domain. Elsewhere in the study, we reported that exploitation of the fishery resources has been largely concentrated on the inshore fishery and foreign fleets have been consistently exploiting offshore areas while the Region remains passive to these developments. **This situation should not be allowed to continue unabated**. In our opinion, this warrants some investments by the Region either on a joint venture basis or as individual countries long before the stock of fishery is depleted. The seemingly and perhaps futile preoccupation with inter-country rivalry probably demonstrates an overcapitalization of the fishery resident in certain countries and greater dividends may be earned from the redirection of this capital resource to offshore fisheries. **However, before this is done, we believe that it would be unwise to pursue this option without a full and comprehensive assessment of the resources that reside in these fishery zones.** Even if it is underway, we think it should be accelerated and intensified, given the possible changes in the fishing grounds that may have taken place due to migration (as a result of e.g. hurricanes) and unauthorized exploitation. This assessment we believe will also allow for greater diversification of effort and reduce the pressure on certain fishing ground. The currently narrow range of exploited species could also be expanded.

It is also recognized that while our fishing efforts have largely concentrated on the continental shelves, similar arguments can be advanced for the full assessment of the inshore fisheries. As reported elsewhere in the study, inshore efforts have largely focused on specific species (grouper, conch, lobster and shrimp) and their commercial exploitation. There is however other species that are either underexploited or discarded as by-catch, but in our opinion can be brought into the commercial basket. This we believe (offshore and inshore assessment) will allow us to determine the true potential that lies within these zones and thereby guide strategic exploitation decisions.

(3) An Assessment of the Contribution of Fishery Resource to the Region's Food and Nutrition Security

Our efforts to calculate the per capita consumption of seafood in the Region remain indeterminate. However, fish and fish products have always been an important part of Caribbean people's diet despite fear and reluctance displayed by others because of toxins such as pollutants and allergens. While the Region produces substantial quantities of high-priced well sought after seafood, these are generally not consumed by a large segment of Caribbean people because (i) the bulk is exported to high-price markets, and (ii) the quantities made available locally, normally

fetch prices beyond the reach of most local people. The fish that enters the domestic food supply chain are mainly those of the less sought after species for the export market; rather it is the rejects from exports', by-catch and supplies from the small resource poor undercapitalized artisinal operators that enter the food system through poorly developed but nevertheless important entry points.

It is important to note here that the developments in the food service sector such as the refrigerated units in supermarkets and meat shops with their geographic spread have the potential to enhance the opportunities available for the efficient marketing of seafood from an extension of the cold chain. We say therefore, that should fish be made more readily available through these and other channels including those provided by itinerant fish chandlers at more attractive prices, it will surely serve to enhance the people's protein consumption levels.

We believe that, although it has not been established in the study, per capita fish consumption could rise to a level that will compete on even grounds with chicken and generate other economy-wide benefits such as enhancement of general food and nutrition security. We also wish to indicate that our fishery represents an important provider and storage of protein in a Region susceptible to natural disasters such as hurricanes, floods and volcanoes. **Accordingly, we believe that given the above arguments, the time is right that a full assessment or reassessment be made of (i) the real per capita consumption of fish and fishery products in the Region, and (ii) the full contribution of the fishery sector to the Regions food supply and by extension food and nutrition security.**

(4) Institutional Arrangements / Coordinating Mechanisms

We have had the opportunity to hold discussions with some of the major fishery stakeholders, technical and administrative personnel, policy makers and laymen/fisher folk and there is the widespread feeling that fishery development and expansion in the Region is being constrained by several institutional factors. These include the current administrative and management systems that have oversight responsibility for the sector; in some parts, the sector is under-funded, undermanned and underrepresented; hemorrhaging of staff is common and diversion and dilution of surveillance activities can be found in others. Additionally, development of landing sites and legislative reform have not kept pace with the adoption of international health and food safety requirements.

Political responsibility for management of the fishery resides in several government departments and the apparent slow pace and the lack of urgency with which some operate have served to further exacerbate the problem. **Accordingly, it is proposed that where feasible, consideration be given to the amalgamation of responsibilities and the development of autonomous, independent, institutional mechanisms to guide their fishery development.** Such a body we believe, appropriately structured, adequately manned, financed and efficiently administered and supported technically and politically, will have flexibility to quickly respond and thus could lead to the development of a more efficient management system for the Region's fishery resource. As is the usual case, representation could be drawn from a wide cross section of participants -- stakeholders, public and private sector and combinations thereof. This unburdened unit will become conversant with the international conventions that guide fishery and its development and their interpretation, assess requirements of the sector under a rapidly changing global environment, coordinate policy, make representations to governments (lobby) as well as stimulate timely exploitation of the fishery. This unit could also provide the enabling environment for investments to exploit the potential that resides within the Regions fishery.

(5) Subsidies and Incentives – Review and Evaluation

Subsidies and other forms of support have been used widely by Caribbean governments to stimulate activities in almost all sectors of the economy. This is particularly true in the case of services and light manufacturing industries as well as agriculture from early in their infancy, through the growth stage and for most part has continued beyond the stage of maturity. **On the input side, the various forms of support have focused on capital items such as specialized operating machinery and equipment, the foregoing of revenue on imported capital items, tax write-offs and tax holiday on income earned as well as critical operating expenses such as fuel.** On the output side, the application has been on price support to increase the consumption and indirectly stimulate increased supply. It is quite clear that this dual function of subsidy and support mechanisms has generated certain benefits and at the same time carries tremendous costs. But it is open to question whether in the longer term these costs outweigh the benefits or the benefits outweigh the costs.

As reported in the earlier sections, our efforts to unravel the apparent mystery that seems to characterize the important role and function of subsidies and its impact on the fishery remained elusive. We reported:

(i) a concentration of the subsidy on the harvesting of fishery through a reduction of the cost of the fishing effort e.g. fuel and equipment,

(ii) that specific quantities that have been paid out and foregone are lumped together and apparently cannot be easily disaggregated,

(iii) the designation of fishing as a farming activity may have colored the attitude to subsidy for fishery in certain countries, similar to that of agricultural activities,

(iv) inability to ascertain in real terms whether the trend in payment of subsidies have been increasing or decreasing and,

(v) requests for continuation of the subsidy programme.

We argued about the lack of evaluation (in the case of the latter). We also believe that such an exercise will be complex and tedious because of fungibility in use. However not withstanding these drawbacks given the fact that certain sectors of the fishery have come to depend on this source of support for their operations and have continued to request adjustment in the levels, it appears that subsidy and other types of support are playing a critical role in the development and maintenance of the sector. **We believe therefore, that this question must be answered once and for all by the commissioning of a separate investigation into this subject taking into consideration the issues raised above.** This evaluation should also address the relationship between subsidy and overexploitation (species and grounds) of the fishery (ii) whether the subsidy programme should be amended, modified or dismantled (iii) whether focus of the subsidy programme should now be redirected or relocated to other critical points of the supply chain such a landing sites and (iv) whether subsidies should now be used to encourage commercialization of new species and encourage deep sea / off shore exploitations and combinations thereof. Further we believe that if it should be continued, it should be performance-based and continuously monitored and evaluated. Given the apparent complexity and reluctance to fully disclose levels of subsidies paid to the sector through different Ministries and Government Departments such an evaluation may best be carried out working in the walls of Ministries of finance.

(6) The WTO and Fisheries

We recognize that today no one country can any longer take an isolationist economic stance. Market economies are constantly changing and new technologies are being developed. Globalized trade is an old phenomenon but its expansion into manufacturing and services is more recent. The move to globalization is forcing countries to remove all the trade barriers and thus widen

trade opportunities. These developments are placing demands on countries to open their markets, as well as their natural resources to greater exploitation. The commodities produced for consumption and exports must also meet newer and more rigid food safety standards while protecting the environment. These have created new demands on Caribbean nations, especially those producing commodities for export. **Given the elevation of the fishery sector onto the WTO table, the following are seen to impact directly on CARICOM nations in the immediate future:**

(6.1) Health and Food Safety – Minimum health and food safety standards including HACCP programmes are being requested by the developed countries. The imposition of these technical conditions has forced indigenous firms to re-organize and re-engineer their plant and equipment in order to comply with markets entry conditions. Importers from developed countries frequently visit and inspect processing plants in exporting countries as a necessary condition for market entry. Heavy metals and histamine as well as use of allergens require testing and notification. Investments in quality assurance infrastructure and laboratories for fish and other products are becoming mandatory. Further, frequent legislative reform in the developed countries have forced countries in the Region interested in exporting fish products to revise their regulations in order to satisfy the minimum market entry requirements.

(6.2) Open Economy to Foreign Investment – One of the consequences of fisheries ascent on the WTO table is that member countries may be asked to further open their natural resource base to foreign investment. This, in the case of fisheries could represent an intrusion in a country's food reservoir which is critical to food, nutrition and livelihood security. Uncontrolled access to this food reserve could lead to its accelerated depletion, much to the detriment of the Region. Given the low level of technology currently adopted by the majority of the Region's fishers, many would be unable able to compete successfully with the high, capital intensive, technology driven foreign fleets and their 'strip mining' system of harvest. This will only serve to accelerate the demise of those who depend on the fishery for their livelihood -- one of the most vulnerable segments of the fishing sector, which are the artisinal fishermen. This development in the long run will negatively affect the fishermen and their families and thus entire communities which depend on the sector. The quest for rapid, un-policed expansion is also likely to exacerbate ecological balance as well as the sustainable levels of the exploited species.

The absence of strict regulations and the lack of enforcement regarding the disposal of fish waste and by catch, and the weak monitoring mechanisms will also serve to further accelerate depletion of the reservoir. In the long run it could lead to destruction of the social fabric of many coastal communities who may be already constrained by the type of agriculture they can practice because of saline conditions and intrusions. Even if licences are issued to foreign fleets, the practice is one which they would have first call on the high valued species, thereby crowding out small operators who would in many ways have afforded local residents access to the high quality products. Further, the inability of local authorities to keep abreast of the changes in technologies and to monitor the efficiency of the fishing effort could lead to unknown exploitation of the fish resource.

Foreign investments are also in many ways attractive. Revenue can be earned from the granting of licences and the collection of taxes which can complement domestic capacity to exploit the fishery to the sustainable limit. However, because of deficiencies in the surveillance system there is doubt whether revenue opportunities can be maximized from this option. Also, given the fact that the foreign fleets come with their own crew, the contribution to local employment will be at best minimal. Further, our experience is that transfer of technology to locals has not been quick enough to transform the sector. On the other hand, if access to the fishery remains closed to high levels of foreign investments and there is lack of exploitation by indigenous fishers, the country will have to forgo benefits in terms of: (i) revenue from fees and licences, (ii) the opportunity to enhance the local food supply as well as food and nutrition security and (iii) economic livelihood / employment.

The two critical issues raised above (i) health and food safety which requires re-engineering and upgrading for HACCP compliance and (ii) the grave implications of opening up the Region's fish reservoir and banks to 'uncontrolled' exploitation to foreign investment, represent key issues that warrant further empirical analysis and research. In the case of (i) above, the investment in these changes by indigenous exporting firms can be positive because they serve to ensure firms market access irrespective of location. In the case of the latter, we have highlighted some of the issues that could become critical should the fish resources be opened to uncontrolled exploitation. **We believe that there are several other related issues that should be explored and analyzed empirically to guide these decisions.** The Region should be cautious on this matter so as not to

suffer the same fate as the accelerated demise experienced by the Canadian Cod fishery[20]. We must also point out that rapid and uncontrolled exploitation could lead to irreversible damage and permanent losses to the Regions fishery.

There are four other global developments that are likely to impact on the contribution of the fishery resources in the Caribbean. These are (i) the role and contribution of subsidies, (ii) the provisions within the CITES agreement (iii) the workings of the Law of the Sea and (iv) the FAO Code of Conduct for Responsible Fisheries. Accordingly in this section we are entering the debate and recommend how the Caribbean should proceed on this subject.

Subsidy

In the context of the working of the WTO agreement, **there appears to be a general call for the restriction or removal of subsidies mainly because of the distortions they create in international trade on certain trade commodities. In the case of fisheries it is likely that some of the arguments can apply in very much the same way. It has been argued that subsidies can lead to overexploitation of the fishery – either specie or ground.**

A proposal has since been tabled at the WTO to ban all subsidies which cause overcapacity in the fisheries sector, proposing a complete ban of all subsidies which "enhance capacity." Subsidies are also being defined as "absence or lack of interventions by government to correct distortions (imperfections) in production and markets, which can potentially affect fishery resources and trade. This includes the implicit benefits to producers that are associated with a lack of government regulations requiring producers to bear the costs that they impose on other parties, including the costs on the environment and natural resources". Additionally subsidy is also now being defined as "such interventions as management measures that may decrease (or increase) the

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[20] A Run on the Banks < http://www.findarticles.com/p/articles/mi_m1594/is_2_12/ai_72610497/pg_2 > "Even if left alone, the northern cod may never recover. Industrial technology and human greed may have so decimated these hardy fish that they can no longer hold onto their ecological niche. The crash could be irreversible".

"They might never come back, at least not in their former abundance," says Richard Haedrich, a fisheries scientist at Memorial University in St. John's. "Once you start changing the whole ecosystem, the community structures and sizes, you've got a whole new ball game."

"There is growing evidence that the trawlers may not only have scooped up all the fish but also laid to waste the entire seafloor environment those fish required to survive"

"Most species take months or years to reestablish themselves, some take decades or centuries. None are given that much time".

short-term benefits to producers but that result in an increase (or decrease) in long-term benefits to producers". An example is where closure of a fishery (or an area of a fishery), which imposes short-term losses on producers, ultimately results in a bumper crop and higher long-term benefits to producers.

While we have no basic objection or reservation to the first contention that subsidies can lead to overcapacity and negative impacts, we are nevertheless concerned about the urgency to place the issue on the WTO table without sufficient empirical evaluation of the implications of the latter definitions on the sector particularly in countries such as those in the Caribbean. In light of this we will support the non-appearance of this matter on the table until these issues have been aired and examined enough to inform our negotiation position based on scientific, social, economic and political assessments / proper examination.. In the interim however, we advise that measures should be undertaken to sustain fishery efforts at current levels (or reduce if possible) where a problem is suspected to exist while programmes are implemented for fishery evaluation as advised by FAO.

The WTO protocol supports open access of ones fishery resource to unfettered exploitation. On the other hand the **CITES** agreement seeks to restrict trade in endangered species including marine species. It is quite apparent that these two international agreements can lead to conflict in their applications. While the CITES convention stresses 'sustainability', the WTO argues for 'access to exploit'. It is quite obvious that these two spheres of concern can lead to conflict and ought to be resolved. It is recognized that countries may want to develop unscientifically proven lists as a device to control access to their fishery resource. It should also be recognized that where access is allowed to foreign exploitation conflicts could also arise. For example if fish harvests fell below expected levels because of faulty stock assessment or unmonitored early exploitation, this could lead to reclassification of the specie from one which is commercially attractive to one that has suddenly become endangered. Investors can in turn seek compensation for such shortfall in fish harvest.

Law of the Sea

The United Nations Convention on the Law of the Sea (UNCLOS) recognizes the sovereignty of all States and the Exclusive Economic Zone which extends 200 nautical miles from the coastline. It serves to effectively allocate additional resources to a country which it would not normally have claim. According to the WTO protocol, countries which are parties to both conventions may

be subject to providing access to the resources that lie within the EEZ. This access can take alternative forms – joint ventures, licensing arrangements of combinations thereof which can be mutually beneficial to both parties. However, while we recognize that these alternatives can bring benefits such as additional revenue, employment opportunities, increased food supply, foreign exchange earnings, they can also bring conflicts which are difficult to resolve. These conflicts may arise from underestimation of the revenue earning potential, violation of the terms and conditions of the license and environmental damage through destruction of breeding grounds, pollution and overexploitation of the fishery. We may also highlight the some CARICOM countries for example haven't established their EEZ boundaries and those which have been established are not without conflict. In such circumstances, it may warrant the development of mechanisms and institutions for the resolution of such conflicts if they do not already exist.

FAO Code of Conduct for Responsible Fisheries

The **FAO Code of Conduct for Responsible Fisheries** provides a framework to for sustainable exploitation of aquatic living resources through conservation, management and development of living aquatic resources giving due respect for the ecosystem and biodiversity. It highlights appropriate management principles such as:

- avoidance of excess fishing capacity
- the need to take into account the interest of fishers including those engaged in subsistence and small-scale fisheries
- conservation of aquatic habitats and ecosystems
- protection of endangered species
- correction of adverse environmental impacts.

Given that the infrastructure required to ensure compliance to the tenets enshrined in the code of conduct may extend beyond the ability of certain countries to ensure that the principles are adhered to when access is provided to the resource, and given that access should be provided under the WTO protocol, then this will expose the fishery to wanton abuse and accelerated depletion. This could have long run negative implications for the country's natural resource base and food bank thereby threatening food and nutrition security and impair the livelihood of the present and future generation, especially those who would depend directly on the sector. At this instant, the ones who would be affected most severely are the small scale artisinal low technology

resource poor fisher folks. Given the situation where resources are not immediately available for ensuring compliance, countries may have to seek adherence to the code of conduct for responsible fisheries in the interim through moral suasion or any other feasible alternative until the capacity is built up.

The major issues here are whether the Code of Conduct is sufficient enough to benefit countries such as those in the Caribbean which currently do not have the capacity to ensure compliance with the guidelines for responsible fisheries and have to depend on these agreements to guide and protect their fishing resources pending development of the requisite enforcement capacity. The above situation calls for a comprehensive analysis of the working of these agreements and their potential impact on country participants.

Earlier in this chapter we set out some critical areas for further exploitation that would provide information that are likely to enhance the Region's decision–making process regarding development and international trade in fishing. These projects are summarized in Table 7.2 below.

While some may be described as necessary to comply with existing rules of globalization, they also:

i. include concerns for effective management of the fishery resources and
ii. embody concerns for the Region's food and nutrition security through greater utilization of currently under-exploited species and by-catch

Others will contribute to the process of preparing the Region for the new challenges that may emerge from international forces / new trade pacts, including the role of subsidy in fishery development and sustainability in the Region.

Additional Recommendations

In addition to the proposals listed in Table 7.2 we add a further two recommendations:

(i) Publication of a Quarterly Fishery Review. A review of athe state of fishery on a quarterly basis.

(ii) An exchange programme between the technically well endowed fishery countries and the lower capacity ones.

The profiles presented in Part B of the Report were developed from an analysis of the data and other information collated during the study, especially the field investigation, and our understanding of the workings of current trade liberalization agreements and conventions that guide fishery resource.

Table 7.2: Summary of Project Proposal

Project Area	Strategic Objectives	Priority Location/Strategy
1. Upgrade and transformation of landing sites	i. HACCP/SPS Compliant ii. Standard Sanitary Operating Procedures	Jamaica Guyana Suriname Belize
2. Fishery Resource Stock Assessment	i. Assessment of current stock levels ii. Projection of Supply (20 years)	All CARICOM / CARIFORUM Countries
3. Contribution of Fishery Resource to Food & Nutrition Security	i. Per capita Consumption of fish and fish products ii. Relative Contribution of fish and fish products / other meats	All CARICOM / CARIFORUM Countries
4. Review of Institutional Arrangements/Coordinating Mechanisms	i. Development of autonomous mechanism for fishery management	All CARICOM / CARIFORUM Countries
5. Review/Evaluation of Role and Contribution of Subsidy and Other support to the fishing sector	i. Rationalization of incentives, subsidies and other support	All CARICOM / CARIFORUM Countries (Ministry of Finance)
6. WTO and Fisheries	i. Potential impact of WTO agreements on fishery exploitation ii. Impact of other related conventions and on the Region's fishery exploitation	All CARICOM / CARIFORUM Countries

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Annex

Annex 1

Classification of Aquatic Animals and Plants

Fish production data are presented by 50 groups of species constituting the nine divisions of the FAO International Standard Statistical Classification of Aquatic Animals and Plants (ISSCAAP). For each ISSCAAP group, the table below indicates the corresponding codes in the FISH PRODUCTION and FISHERY DATA - Primary Products domains.

Classification of Aquatic Animals and Plants (Source: <http://faostat.fao.org/faostat/agricult/fishitems-e-e.htm>)

ISSCAAP code	FAOSTAT code - Fish Production	DIVISION / Group of species	Unit	FAOSTAT code - Fishery Data
1	1501	FRESHWATER FISHES	Tonnes	
11	1401	Carps, barbels and other cyprinids	Tonnes	1501
12	1402	Tilapias and other cichlids	Tonnes	1501
13	1403	Miscellaneous freshwater fishes	Tonnes	1501
2	1502	DIADROMOUS FISHES	Tonnes	
21	1404	Sturgeons, paddlefishes	Tonnes	1501
22	1405	River eels	Tonnes	1501
23	1406	Salmons, trouts, smelts	Tonnes	1501
24	1407	Shads	Tonnes	1501
25	1408	Miscellaneous diadromous fishes	Tonnes	1501
3	1503	MARINE FISHES	Tonnes	
31	1409	Flounders, halibuts, soles	Tonnes	1514
32	1410	Cods, hakes, haddocks	Tonnes	1514
33	1411	Miscellaneous coastal fishes	Tonnes	1514
34	1412	Miscellaneous demersal fishes	Tonnes	1514
35	1413	Herrings, sardines, anchovies	Tonnes	1527
36	1414	Tunas, bonitos, billfishes	Tonnes	1527
37	1415	Miscellaneous pelagic fishes	Tonnes	1527
38	1416	Sharks, rays, chimaeras	Tonnes	1514
39	1417	Marine fishes not identified	Tonnes	1540
4	1504	CRUSTACEANS	Tonnes	
41	1418	Freshwater crustaceans	Tonnes	1553
42	1419	Crabs, sea-spiders	Tonnes	1553

Classification of Aquatic Animals and Plants (Continued)

43	1420	Lobsters, spiny-rock lobsters	Tonnes	1553
44	1421	King crabs, squat-lobsters	Tonnes	1553
45	1422	Shrimps, prawns	Tonnes	1553
46	1423	Krill, planktonic crustaceans	Tonnes	1553
47	1424	Miscellaneous marine crustaceans	Tonnes	1553
5	1505	MOLLUSCS	Tonnes	
51	1425	Freshwater molluscs	Tonnes	1562
52	1426	Abalones, winkles, conchs	Tonnes	1562
53	1427	Oysters	Tonnes	1562
54	1428	Mussels	Tonnes	1562
55	1429	Scallops, pectens	Tonnes	1562
56	1430	Clams, cockles, arkshells	Tonnes	1562
57	1431	Squids, cuttlefishes, octopuses	Tonnes	1570
58	1432	Miscellaneous marine molluscs	Tonnes	1562
6		AQUATIC MAMMALS		
61	1433	Blue-whales, fin-whales *	Number	(1579)
62	1434	Sperm-whales, pilot-whales *	Number	(1579)
63	1435	Eared seals, hair seals, walruses *	Number	(1579)
64	1436	Miscellaneous aquatic mammals *	Tonnes	(1579)
7	1507	MISCELLANEOUS AQUATIC ANIMALS	Tonnes	
71	1437	Frogs and other amphibians	Tonnes	1587
72	1438	Turtles	Tonnes	1587
73	1439 **	Crocodiles and alligators **	Number	
74	1440	Sea-squirts and other tunicates	Tonnes	1587
75	1441	Horseshoe crabs and other arachnoids	Tonnes	1587
76	1442	Sea-urchins and other echinoderms	Tonnes	1587
77	1443	Miscellaneous aquatic invertebrates	Tonnes	1587

Classification of Aquatic Animals and Plants (Continued)

8		MISCELLANEOUS AQUATIC ANIMAL PRODUCTS		
81	1444	Pearls, mother-of-pearl, shells *	Kilograms	
82	1445	Corals *	Kilograms	
83	1446	Sponges *	Kilograms	
9		AQUATIC PLANTS		
91	1447	Brown seaweeds *	Tonnes	1594
92	1448	Red seaweeds *	Tonnes	1594
93	1149	Green seaweeds *	Tonnes	1594
94	1450	Miscellaneous aquatic plants *	Tonnes	1594

* Data belonging to groups indicated by an asterisk are excluded from all national, regional and global totals presented in the FAO Yearbook of Fishery Statistics - Capture production.

** Data of Crocodiles and alligators are excluded from the subtotal of MISCELLANEOUS AQUATIC ANIMALS.

Annex 2
Fisheries Statistics, Major Countries (1999-01 Av)

No.	Major World Producers		Mollusks		Salmons, Trouts, Smelts		Shrimps, Prawns		Tunas, Bonitos, Billfishes		Crustaceans	
	Country	Production (Tonnes)	Country	Production (Tonnes)	Country	Production (Tonnes)	Country	Production (Tonnes)	Country	Production (Tonnes)	Country	Production (Tonnes)
1	World	71,442,622	World	18,413,578	World	2,442,924	World	4,185,004	World	5,899,200	World	8,170,684
2	China	11,158,049	China	11,225,996	Norway	492,195	China	1,258,189	China	1,061,732	China	3,863,020
3	Peru	8,863,631	Japan	1,458,016	USA	382,449	India	436,438	Indonesia	753,675	India	487,935
4	Chile	4,225,678	USA	807,677	Chile	359,005	Indonesia	398,727	Japan	670,921	Indonesia	444,851
5	Japan	3,711,314	Korea Rep.	770,398	Japan	259,401	Thailand	371,586	Philippines	367,854	Thailand	439,249
6	USA	3,383,897	Thailand	400,490	Russian Fed	247,345	Vietnam	152,522	Spain	304,407	USA	361,419
7	Indonesia	3,294,401	Spain	367,974	United Kingdom	150,139	USA	147,914	Korean Rep	246,656	Canada	285,141
8	Russian Fed.	3,285,228	Argentina	324,869	Canada	133,651	Canada	129,758	Ecuador	205,595	Viet Nam	222,642
9	Norway	2,602,641	France	273,718	Italy	44,992	Malaysia	106,338	USA	184,435	Japan	200,278
10	India	2,291,177	Italy	248,444	France	43,706	Mexico	98,737	Thailand	160,829	Philippines	127,823
11	Thailand	2,233,944	Viet Nam	220,239	Turkey	40,690	Greenland	83,909	Mexico	158,610	Mexico	124,561
12	Rest of World	26,392,659	Rest of World	2,315,755	Rest of World	289,350	Rest of World	1,000,885	Rest of World	1784488	Rest of World	1,613,765

Annex 3

PHYLUM MOLLUSCA		
CLASS BIVALVIA (CLAMS, MUSSELS)		
VENERIDA		
Tridacnidae Giant clams		
Appendix I	Appendix II	Appendix III
	Tridacnidae spp.	
UNIONIDA		
Unionidae Freshwater mussels, pearly mussels		
Conradilla caelata, Dromus dromas, Epioblasma florentina, Epioblasma sampsoni, Epioblasma sulcata perobliqua, Epioblasma torulosa gubernaculum	*Cyprogenia aberti , Epioblasma torulosa rangiana*	

CLASS HOLOTHUROIDEA (SEA CUCUMBERS)		
ASPIDOCHIROTIDA		
Stichopodidae Sea cucumbers		
Appendix I	**Appendix II**	**Appendix III**
		Isostichopus fuscus (Ecuador)

CLASS REPTILIA (REPTILES)		
TESTUDINATA		
Dermatemydidae Central American river turtle		
Appendix I	**Appendix II**	**Appendix III**
	Dermatemys mawii	
Platysternidae Big-headed turtle		
	Platysternon megacephalum	
Emydidae Box turtles, freshwater turtles		
	Annamemys annamensis	
Batagur baska	***Callagur borneoensis***	

Annex 3

(Continued)

CLASS ELASMOBRANCHII (SHARKS)		
ORECTOLOBIFORMES		
Rhincodontidae Whale shark		
Appendix I	**Appendix II**	**Appendix III**
	Rhincodon typus	
LAMNIFORMES		
Lamnidae Great white shark		
		Carcharodon carcharias (Australia)
Cetorhinidae Basking shark		
	Cetorhinus maximus	

CLASS ACTINOPTERYGII (FISH)		
ACIPENSERIFORMES Paddlefish, sturgeons		
Appendix I	**Appendix II**	**Appendix III**
	ACIPENSERIFORMES spp. (Except the species included in Appendix I)	
Acipenseridae Sturgeons		
Acipenser brevirostrum, Acipenser sturio		
OSTEOGLOSSIFORMES		
CETACEA Dolphins, porpoises, whales		
	CETACEA spp. (Except the species included in Appendix I. A zero annual export quota for live specimens from the Black Sea population of *Tursiops truncatus*	
Platanistidae River dolphins		
Lipotes vexillifer, Platanista spp.		
Ziphiidae Beaked whales, bottle-nosed whales		
Berardius spp., *Hyperoodon* spp.		
Physeteridae Sperm whales		
Physeter catodon		
Delphinidae Marine dolphins		
***Sotalia* spp.**		
***Sousa* spp.**		
Phocoenidae Porpoises		
Neophocaena phocaenoides		
Phocoena sinus		
Eschrichtiidae Grey whale		
Eschrichtius robustus		

Annex 4

List of CARICOM Countries Signatory to CITES

Order of entry into force	State	Date 2 Entry into force
141	Antigua and Barbuda	06/10/1997
50	Bahamas	18/09/1979
119	Barbados	09/03/1993
69	Belize	21/09/1981
129	Dominica	02/11/1995
146	Grenada	28/11/1999
33	Guyana	25/08/1977
137	Jamaica	22/07/1997
122	Saint Kitts and Nevis	15/05/1994
77	Saint Lucia	15/03/1983
95	Saint Vincent and the Grenadines	28/02/1989
60	Suriname	15/02/1981
83	Trinidad and Tobago	18/04/1984

Annex 5
CARICOM – Costa Rica Agreement (Fishery Products)

Source: http://www.sice.oas.org/Trade/crcrcom_e/Chap03_e.asp#art-b

Agreement Between The Caribbean Community (Caricom), Acting On Behalf Of The Governments Of Antigua And Barbuda, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, St. Kitts And Nevis, Saint Lucia, St. Vincent And The Grenadines, Suriname And Trinidad And Tobago And The Government Of The Republic Of Costa Rica

PART TWO: TRADE IN GOODS
Chapter III: National Treatment and Access of Goods to the Market

B. Excluded products
Goods included in Tables B.1 and B.2 shall be excluded from the Tariff Elimination Schedule, meaning the Parties shall apply the MFN tariff upon those goods classified in such tariff items.

Table B.1
CARICOM List

Tariff Line	Description
0302	Fish, fresh or chilled, excluding fish fillets and other fish meat of Heading No. 03.04
0303	Fish, frozen, excluding fish fillets and other fish meat of Heading No. 03.04
0304	Fish fillets and other fish meat, (whether or not minced) fresh, chilled or frozen
0306	Custaceans whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine; crustaceans, in shell, cooked by steaming or by boiling in water, whether or not chilled, frozen, dried, salted or in brine; flours, meals and pellets of crustaceans, fit for human consumption

Table B.2
Costa Rican List

Tariff line HS 2002	Description
0302	Fish, fresh or chilled, excluding fish fillets and other fish meat of heading No. 03.04
0303	Fish, frozen, excluding fish fillets and other fish meat of heading No. 03.04
0304	Fish fillets and other fish meat (whether or not minced), fresh, chilled or frozen
0306	Crustaceans, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine; crustaceans, in shell, cooked by steaming or by boiling in water, whether or not chilled, frozen, dried, salted or in brine; flours, meals, and pellets fo crustaceans, fit for human consumption

C. Products subject to tariff elimination schedules : The MFN tariff applicable on January 1st 2003 for originating goods in the tariff items included in Tables C.1 and C.2 shall be eliminated in four (4) equal annual stages, starting on the date of entry into force of the Agreement, and continuing the phase out on January 1st of each following year, to be determined as follow:

i)	Date of entry into force	1/4
ii)	January 1, 2005	2/4
iii)	January 1, 2006	3/4
iv)	January 1, 2007	4/4

Annex 5
CARICOM – Costa Rica Agreement (Fishery Products) continued

D. Special list

The goods included in Table D. 1 and D. 2 shall be subject to different preferential treatments, as specified for each country. The treatments granted under this arrangement are: immediate free access upon the entry into force of this Agreement; exclusion, according to Article 02. B of this Annex; and phase out, according to Article 02. C of this Annex.

Table D. 1
CARICOM List

Tariff Line	**Description**	**Costa Rica**	**Barbados**	**Guyana**	**Jamaica**	**Suriname**	**Trinidad and Tobago**
03.05	Fish dried, salted or in brine, smoked fish whether or not cooked before or during the smoking process; flour, meals, and pellets of fish fit for human consumption	Phasing out, except for Trinidad and Tobago which is free, and Jamaica and Suriname which are subject to **MFN tariff**	**Phased**	**Phased**	**EXC**	EXC	Free
1603	Extracts and juices of meat, fish or crustaceous, mollusc or other aquatic invertebrates	Free, except for Jamaica which is subject to MFN tariff	Free	Free	EXC	Free	Free
16.04	Prepared or preserved fish caviar and caviar substitutes prepared from fish eggs	Free, except for Jamaica which is subject to MFN tariff	Free	Free	EXC	Free	Free
16.05	Crustaceous, mollusc and other aquatic invertebrates prepared or preserved	Free, except for Jamaica which is subject to MFN tariff	Free	Free	EXC	Free	Free

Table D. 2
Costa Rican List

Tariff Line HS 2002	**Description**	Costa Rica	Barbados	**Guyana**	Jamaica	Suriname	Trinidad and Tobago
0305	Fish, dried, salted or in brine; smoked fish, whether or not cooked before or during the smoking process; flours, meals and pellets of fish, fit for human consumption	Phasing out, except for Trinidad and Tobago which is free, and Jamaica and Suriname which are subject to MFN tariff	Phased	Phased	EXC	EXC	Free

Annex 6

CARICOM – Colombia Bilateral Agreement

ANNEX II

Products for which immediate duty free concessions will be offered on imports originating in Colombia into the MDS's of CARICOM participating in the agreement from June 1, 1998. The tariff on the products listed in Annex II shall be eliminated through three equal annual reductions commencing on the date of the entry into force of this Agreement.

CARICOM TARIFF HEADING	COLOMBIA TARIFF HEADING	DESCRIPTION
1604.142	1604.1420.00	Skip Jack and Bonito prepared or preserved.

CARICOM - Colombia: Annex III

List of products for which duty concession could be negotiated in future: Most Favoured Nation treatment will be applied to products listed in Annex III. This is an additional list of products chosen from CARICOM's exportable offer, which may receive preferential treatment in Colombia beginning in the fourth year after the entry into force of this Agreement, following negotiations between the Parties. For products other than those listed in Annexes I, II and III to this Agreement, Most Favoured Nation treatment shall be applied unless the Joint Council decides to improve the treatment.

CARICOM - Colombia: Annex III

CARICOM TARIFF HEADING	PRODUCT/DESCRIPTION	NANDINA	RATE OF DUTY
03.03	Fish, frozen	0303000000	20
03.04	Fish fillets and other fish meat, fresh or chilled	0304100000	20
03.04	Fish fillets and other fish meat, frozen	0304200000	20
03.06	Shrimps, frozen	0306139020	20

ARTICLE 6: TREATMENT OF IMPORTS INTO CARICOM FROM COLOMBIA

1. The Parties agree that CARICOM shall grant Most Favoured Nation treatment in the application of the customs tariff in respect of all imports from Colombia.
2. CARICOM further undertakes that Member States of CARICOM shall not, without prior consultation with Colombia, apply any non-tariff barriers with respect to imports from Colombia beyond those currently in place or those authorised under the Treaty establishing the Caribbean Community.
3. The More Developed Countries (MDCs) of CARICOM, namely, Barbados, Guyana, Jamaica and Trinidad and Tobago, shall introduce a programme to eliminate or reduce tariffs on an agreed list of products of export interest to Colombia, commencing at the beginning of the fourth year after the entry into force of this Agreement.
4. The list of products to be offered preferential treatment by the CARICOM MDCs shall be agreed during the evaluation of the Agreement by the Joint Council in the third year after the entry into force of this Agreement. To this end, CARICOM will consider favourably the proposals by Colombia in order to bring into effect the reciprocity in this Agreement.
5. The CARICOM LDCs shall not be required to grant tariff concessions to exports of Colombia into their territories

Source: Sice Foreign Trade Information System. Agreement On Trade, Economic And Technical Cooperation Between The Caribbean Community (Caricom) And The Government Of The Republic Of Colombia. <http://www.sice.oas.org/trade/caricome.asp>

Annex 7
CARICOM – Venezuela Trade Agreement

AGREEMENT ON TRADE, ECONOMIC AND TECHNICAL COOPERATION BETWEEN THE CARIBBEAN COMMUNITY (CARICOM) AND THE GOVERNMENT OF THE REPUBLIC OF VENEZUELA

Article 1: OBJECTIVE

The fundamental objective of this Agreement shall be to strengthen the economic and trade relations between the Parties through:

(a) the promotion and expansion of the sale of goods originating in CARICOM through, inter alia, oneway dutyfree access to the Venezuelan market;

(b) the stimulation of investments aimed at taking advantage of the markets of the Parties and strengthening their competitiveness in world trade;

(c) the facilitation of the creation and operation of regional joint ventures; and

(d) the encouragement of mechanisms for the promotion and protection of investments by nationals of the Parties.

PRODUCTS FROM THE CARICOM EXPORTABLE OFFER WITH DUTY FREE ACCESS TO THE VENEZUELAN MARKET

VENEZUELAN TARIFF HEADING	CARICOM TARIFF HEADING	PRODUCT DESCRIPTION	TARIFF %	LEGAL REGIME+
0106.00.90.90	0106	Other Live Animals	10	5,6
0301.90.10	0301.901	Other Living Fish for Breeding or Industrial Rearing	5	5
0302.00.00.90	0302	Flying fish, stripe bellied fish, bonito, snapper, (roncador) fresh or chilled	20	3,5
0303.00.00.90	0303	Stripe bellied fish, bonito,snapper, (roncador), Trout and Shark	20	3,5
0304.20.00.90	0304.20	Fillet of Fish, Frozen	20	3,5
0304.90.00.90	0304.90	Fish meat, Fresh, Chilled or Frozen	20	3,5
0305.40.00.90	0305.401	Other Fish, Smoked	20	3,5
0305.51.00.90	0305.402	Other Fish, Dry	20	3,5
0305.69.00.90	0305	Other Fish, Salted	20	3,5
0306.13.90	0306.00	Shrimp, Prawns, Frozen	20	3,5
0306.19.00	0306	Other Crustacea, Frozen	20	3,5
0307.00.00.19	0307	Other Molluscs, Frozen	20	3,5

Source: Sice Foreign Trade Information System. PRODUCTS FROM CARICOM EXPORTABLE OFFER SUBJECT TO THE PHASED REDUCTION. http://www.sice.oas.org/trade/CARIVEN3.asp

Annex 8

Tariff structure for selected fishery products imported into Belize (2001)

(Source: Hemispheric Database)

Tariff Line Level	Description	Value	Nature	Preferences
		MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	MFN STATUTORY (LEGAL/ AUTONOMOUS) DUTY	
301101000	ORNAMENTAL FISH FOR BREEDING	0	Ad Valorem	
301109000	OTHER ORANAMENTAL FISH	40	Ad Valorem	
301910000	TROUT (SALMO TRUTTA,ONCORHYNCHUS MYKISS, ONCORHYNCHUS CLARKI ONCORHYNCHUS	40	Ad Valorem	
301920000	EELS (ANGUILLA SPP.)	40	Ad Valorem	
301930000	CARP	40	Ad Valorem	
301991000	OTHER LIVE FISH FOR BREEDING	0	Ad Valorem	
301999000	OTHER LIVE FISH	40	Ad Valorem	
302110000	TROUT, FRESH OR CHILLED	40	Ad Valorem	
302120000	PACIFIC SALMON, FRESH OR CHILLED	40	Ad Valorem	
302190000	OTHER SALMONIDAE, EXCLUDING LIVERS & ROES	40	Ad Valorem	
302210000	HALBIT FRESH OF CHILLED	40	Ad Valorem	
302220000	PLAICE FRESH OR CHILLED	40	Ad Valorem	
302230000	SOLES FRESH OR CHILLED	40	Ad Valorem	
302290000	OTHER FLAT FISH EXCLUDING LIVERS & ROES	40	Ad Valorem	
302311000	ALBORCE OR LONGFINNED TUNNAS FOR PROCESSING	0	Ad Valorem	
302319000	OTHER ALBOCORE OR LONGFINNED TUNAS	40	Ad Valorem	
302321000	YELLOWFIN TUNAS FOR PROCESSING	0	Ad Valorem	
302329000	OTHER YELLOWFIN TUNAS (THUNNUS ALBACARES)	40	Ad Valorem	
302330000	SKIPJACK OR STRIPE-BELLIED BONITO	40	Ad Valorem	
302390000	OTHER SKIPJACK OR STRIPE-BELLIED BONITO	40	Ad Valorem	
302401000	HERRINGS, EXCLUDING LIVERS & ROES FOR PROCESSING	0	Ad Valorem	
302409000	OTHER HERRINGS, EXCLUDING LIVERS & ROES	40	Ad Valorem	
302501000	COD,EXCLUDING LIVERS & ROES FOR PROCESSING	0	Ad Valorem	
302509000	OTHER COD (GADUS MORHUA GADUS OGAC,GADUS MACROCEPHALUS,EXCLUD.LIVERS &ROES	40	Ad Valorem	
302611000	SARDINES, SARDINELLA, BRISLING OR SPRATS FOR PROCESSING	0	Ad Valorem	
302619000	OTHER SARDINES, SARDINELLA BRISLING OR SPRATS FOR PROCESSING	40	Ad Valorem	
302621000	HADDOCK (MELANOGFAMMUS AELEFINUS) FOR PROCESSING	0	Ad Valorem	
302629000	OTHER HADDOCK (MELANOGRAMMUS AGELEFINUS)	40	Ad Valorem	
302630000	COALFISH (POLLACHIUS VIRENS)	40	Ad Valorem	
302649000	OTHER MACKREL	40	Ad Valorem	

Annex 8 : Tariff structure for selected fishery products imported into Belize 2001

(Continued) (Source: Hemispheric Database)

302650000	DOGFISH & OTHER SHARKS	40	Ad Valorem	
302660000	EELS (ANGUILLA SPP)	40	Ad Valorem	
302691000	ALEWIVES,SAITHE.POLLOCK,& HAKE FOR PROCESSING	0	Ad Valorem	
302692000	SNAPPER, CROAKER, GROUPER, DOLPHIN, BANGA MARY & SEA TROUT	40	Ad Valorem	
302693000	FLYING FISH	40	Ad Valorem	
302699000	OTHER FISH, FRESH OR CHILLED	40	Ad Valorem	
302700000	LIVERS & ROES	40	Ad Valorem	
303100000	PACIFIC SALMON EXCLUDING LIVERS & ROES, FROZEN	40	Ad Valorem	
303210000	TROUT FROZEN	40	Ad Valorem	
303220000	ATLANTIC SALMON (SALMON SALAR) & DANUBE SALMON (HUCHO HUCHO), FROZEN	40	Ad Valorem	
303290000	OTHER SALMON, FROZEN	40	Ad Valorem	
303310000	HAILBUT FROZEN	40	Ad Valorem	
303320000	PLAICE FROZEN	40	Ad Valorem	
303330000	SOLE (SOLEA SPP.), FROZEN	40	Ad Valorem	
303390000	OTHER FLAT FISH EXCLUDING LIVERS & ROES, FROZEN	40	Ad Valorem	
303411000	ALBOCARE OR LONGFINNED TUNAS FOR PROCESSING	0	Ad Valorem	
303419000	OTHER ABLACORE OR LONGFINNED TUNAS	40	Ad Valorem	
303421000	YELLOWFIN TUNAS (THUNNUS ALBACARES) FOR PROCESSING	0	Ad Valorem	
303429000	OTHER YELLOWFIN TUNAS (THUNNUS ALBACARES)	40	Ad Valorem	
303430000	SKIPJACK OR STRIPE-BELLIED BONITO	40	Ad Valorem	
303490000	OTHER SKIPJACK OR STRIPE-BELLIED BONITO	40	Ad Valorem	
303501000	HERRINGS EXCLUDING LIVERS & ROES PROCES FOR PROCESSING	0	Ad Valorem	
303509000	OTHER HERRINGS (CLUPEA HARENGUS, CLUPEA PALLASII) EXCLUD. LIVERS & ROES	40	Ad Valorem	
303601000	COD FOR PROCESSING	0	Ad Valorem	
303609000	OTHER COD (GADUS MORHUA, OGAC, MACROCEPHALUS	40	Ad Valorem	
303711000	SARDINES (SARDINA PILCHARDUS, SARDINOPS SPP.) SARDINELLA FOR PROCESSING	0	Ad Valorem	
303719000	OTHER SARDINE (SARDINA PILCHARDUS SARDINOPS SPP	40	Ad Valorem	
303721000	HADDOCK (MELANOGRAMMUS AEGLEFINUS) FOR PROCESSING	0	Ad Valorem	
303729000	OTHER HADDOCK (MELANOGFAMMUS AEGLEFINUS)	40	Ad Valorem	
303730000	COALFISH (POLLACHIUS VIRENS)	40	Ad Valorem	
303741000	MACKEREL (SCOMBER SCOMBRUS,AUSTRALASICUS,JAPONICUS) FOR PROCESSING	0	Ad Valorem	
303749000	OTHER MACKEREL(SCOMBER SCOMBRUS,AUSTRALASICUS,JAPONICUS	40	Ad Valorem	
303750000	DOG FISH AND OTHER SHARKS	40	Ad Valorem	
303760000	EELS (ANGUILLA SPP.)	40	Ad Valorem	
303770000	SEA BASS (DICENTRARCHUS LABRAX, PUNCTATUS	40	Ad Valorem	
303781000	HAKE (MERLUCCIUS SPP.,URPHYCIS SPP.) FOR PROCESSING	0	Ad Valorem	

Annex 8: Tariff structure for selected fishery products imported into Belize 2001

(Continued) (Source: Hemispheric Database)

303789000	OTHER HAKE (MERLUCCIUS SPP. , URPHYCIS SPP.)	40	Ad Valorem	
303791000	ALEWIVES, SAITHE & POLLOCK, FOR PROCESSING	0	Ad Valorem	
303792000	SNAPPER, CROAKER, GROUPER, DOLPHIN, BANGMARY & SEA TROUT	40	Ad Valorem	
303793000	FLYING FISH	40	Ad Valorem	
303799000	OTHER FISH, FROZEN	40	Ad Valorem	
303801000	LIVERS	40	Ad Valorem	
303802000	ROES	40	Ad Valorem	
304101000	FILLETS OF FLYING FISH, FRESH OR CHILLED	40	Ad Valorem	
304109000	OTHER FISH FILLETS FRESH OR CHILLED	40	Ad Valorem	
304201000	FROZEN FILLETS FLYING FISH	40	Ad Valorem	
304209000	OTHER FROZEN FILLETS	40	Ad Valorem	
304900000	OTHER FISH FILLETS & OTHER FISH MEAT (WHETHER OR NOT MINCED)FRESH,CHILL.FR	40	Ad Valorem	
305100000	FLOURS,MEALS & PELLETS OF FISH, FIT FOR HUMAN CONSUMPTION	20	Ad Valorem	
305200000	LIVERS & ROES,DRIED,SMOKED,SALTED OR IN BRINE	20	Ad Valorem	
305300000	FISH FILLETS, DRIED SALTED OR IN BRINE , BUT NOT SMOKED	20	Ad Valorem	
305410000	PACIFIC SALMON, ATLANTIC SALMON & DANUBE SALMON, SMOKED	20	Ad Valorem	
305420000	HERRINGS (CLUPEA HARENGUS,PALLASII)	35	Ad Valorem	
305491000	COD, MACAREL, AND ALEWIVES	35	Ad Valorem	
305499000	OTHER SMOKED FISH INCLUDING FILLETS	20	Ad Valorem	
305510000	CODDRIED, WHETHER OR NOT SALTED BUT NOT SMOKED	35	Ad Valorem	
305591000	MACKEREL, DRIED WHETHER OR NOT SALTED, BUT NOT SMOKED	35	Ad Valorem	
305592000	HERRINGS, ALEWIVES, SAITHE, POLLOCK, HADDOCK & HAKE	35	Ad Valorem	
305599000	OTHER DRIED FISH	20	Ad Valorem	
305610000	HERRING SALTED BUT NOT DRIED OR SMOKED	35	Ad Valorem	
305620000	COD SALTED BUT NOT DRIED OR SMOKED	35	Ad Valorem	
305630000	ANCHOVIES SALTED BUT NOT DRIED OR SMOKED	20	Ad Valorem	
305691000	MACKEREL	35	Ad Valorem	
305692000	ALEWIVES, SAITHE, PODDOCK, HADDOCK & HAKE SALTED BUT NOT DRIED OR SMOKED	35	Ad Valorem	
305699000	OTHER FISH DRIES ,SALTED OR IN BRINE; SMOKED FISH, WHETHER OR NOT COOKED	20	Ad Valorem	
306110000	ROCK LOBSTER & OTHER SEA CRAWFISH (PALLINURUS SPP., PANULIRUS SPP.,JASUS S	45	Ad Valorem	
306120000	LOBSTER FROZEN	45	Ad Valorem	
306130000	SHRIMPS & PRAWNS, FROZEN	45	Ad Valorem	
306140000	CRABS FROZEN	45	Ad Valorem	
306191000	CONCH FROZEN	45	Ad Valorem	

Annex 9: Tariff structure for selected fishery products imported into Jamaica (2001)

(Source: Hemispheric Database)

Tariff Line Level	Description	Value MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	Nature MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	Preferences
301101000	For breeding	0	Ad Valorem	
301109000	Other	40	Ad Valorem	
301910000	Trout (Salmo trutta, Oncorhynchus myki	40	Ad Valorem	
301920000	Eels (Anguilla spp.)	40	Ad Valorem	
301930000	Carp	40	Ad Valorem	
301991000	For breeding	0	Ad Valorem	
301999000	Other	40	Ad Valorem	
302110000	Trout (Salmo trutta, Oncorhynchus myki	40	Ad Valorem	
302120000	Pacific salmon (Oncorhynchus nerka, Onc	40	Ad Valorem	
302190000	Other	40	Ad Valorem	
302210000	Halibut (Reinhardtius hippo	40	Ad Valorem	
302220000	Plaice (Pleuronectes platessa)	40	Ad Valorem	
302230000	Soles (Solea spp.)	40	Ad Valorem	
302290000	Other	40	Ad Valorem	
302311000	For processing	0	Ad Valorem	
302319000	Other	40	Ad Valorem	
302321000	For processing	0	Ad Valorem	
302329000	Other	40	Ad Valorem	
302330000	Skipjack or stripe-bellied bonito	40	Ad Valorem	
302390000	Other	40	Ad Valorem	
302401000	For processing	0	Ad Valorem	
302409000	Other	40	Ad Valorem	
302501000	For processing	0	Ad Valorem	
302509000	Other	40	Ad Valorem	
302611000	For processing	0	Ad Valorem	
302619000	Other	40	Ad Valorem	
302621000	For processing	0	Ad Valorem	
302629000	Other	40	Ad Valorem	
302630000	Coalfish (Pollachius virens)	40	Ad Valorem	
302641000	For processing	0	Ad Valorem	
302649000	Other	40	Ad Valorem	
302650000	Eels (Anguilla spp.)	40	Ad Valorem	
302660000	Dogfish and other sharks	40	Ad Valorem	
302691000	Alewives, saithe, pollock, and hak	0	Ad Valorem	
302692000	Snapper, croaker, grouper, dolphin, ba	40	Ad Valorem	
302693000	Flying fish	40	Ad Valorem	
302699000	Other	40	Ad Valorem	
302700000	Livers and roes	40	Ad Valorem	
303100000	Pacific salmon (Oncorhynchus nerka, Onc	40	Ad Valorem	
303210000	Trout (Salmo trutta, Oncorhynchus myki	40	Ad Valorem	
303220000	Atlantic salmon (Salmon salar) and Dan	40	Ad Valorem	

Annex 9: Tariff structure for selected fishery products imported into Jamaica (2001)

Continued (Source: Hemispheric Database)

303290000	Other	40	Ad Valorem	
303310000	Halibut (Reinhardtius hippog	40	Ad Valorem	
303320000	Plaice (Pleuronectes platessa)	40	Ad Valorem	
303330000	Sole (Solea spp.)	40	Ad Valorem	
303390000	Other	40	Ad Valorem	
303411000	For processing	0	Ad Valorem	
303419000	Other	40	Ad Valorem	
303421000	For processing	0	Ad Valorem	
303429000	Other	40	Ad Valorem	
303430000	Skipjack or stripe-bellied bonito	40	Ad Valorem	
303490000	Other	40	Ad Valorem	
303501000	For processing	0	Ad Valorem	
303509000	Other	40	Ad Valorem	
303601000	For processing	0	Ad Valorem	
303609000	Other	40	Ad Valorem	
303711000	For processing	0	Ad Valorem	
303719000	Other	40	Ad Valorem	
303721000	For processing	0	Ad Valorem	
303729000	Other	40	Ad Valorem	
303730000	Coalfish (Pollachius virens)	40	Ad Valorem	
303741000	For processing	0	Ad Valorem	
303749000	Other	40	Ad Valorem	
303750000	Dogfish and other sharks	40	Ad Valorem	
303760000	Eels (Anguilla spp.)	40	Ad Valorem	
303770000	Sea bass (Dicentrarchus labrax, Dicentr	40	Ad Valorem	
303781000	For processing	0	Ad Valorem	
303789000	Other	40	Ad Valorem	
303791000	Alewives, saithe, □ollock, and hak	0	Ad Valorem	
303792000	Snapper, croaker, grouper, dolphin, ba	40	Ad Valorem	
303793000	Flying fish	40	Ad Valorem	
303799000	Other	40	Ad Valorem	
303801000	Livers	40	Ad Valorem	
303802000	Roes	40	Ad Valorem	
304101000	Fillets of flying fish	40	Ad Valorem	
304109000	Other	40	Ad Valorem	
304201000	Flying fish	40	Ad Valorem	
305100000	Flours, meals and pellets of fish, fi	20	Ad Valorem	
305200010	Fish livers and roes, naturally dried sa	20	Ad Valorem	
305200020	Fish livers and roes ,dried (artificiall	20	Ad Valorem	
305300000	Fish fillets, dried, salted or in brine,	20	Ad Valorem	
305410000	Pacific salmon (Oncorhynchus nerka, Onc	20	Ad Valorem	
305420000	Herrings (Clupea harengus, Clupea palla	0	Ad Valorem	
305499000	Other	20	Ad Valorem	

Annex 9: Tariff structure for selected fishery products imported into Jamaica (2001)

Continued (Source: Hemispheric Database)

305510000	Cod (Gadus morhua, Gadus ogac, Gadus ma	0	Ad Valorem	
305591000	Mackerel	0	Ad Valorem	
305592000	Herrings, alewives, saithe, pollock, h	0	Ad Valorem	
305599000	Other	20	Ad Valorem	
305610000	Herrings (Clupea harengus, Clupea palla	0	Ad Valorem	
305620000	Cod (Gadus morhua, Gadus ogac, Ga	0	Ad Valorem	
305630000	Achovies (Engraulis spp.)	20	Ad Valorem	
305691000	Mackerel	20	Ad Valorem	
305692000	Alewives, saithe, poddock, haddock and	0	Ad Valorem	
305699000	Other	20	Ad Valorem	
306110000	Rock lobster and other sea crawfish (Pa	40	Ad Valorem	
306120000	Lobster (Homarus spp.)	40	Ad Valorem	
306130000	Shrimps and prawns	40	Ad Valorem	
306140000	Crabs	40	Ad Valorem	
306191000	Conch	40	Ad Valorem	
306192000	Other Crustaceans	40	Ad Valorem	
306199000	Other	40	Ad Valorem	
306211000	Live, for breeding or rearing	0	Ad Valorem	
306219000	Other	40	Ad Valorem	
306221000	Live, for breeding or rearing	0	Ad Valorem	
306229010	Lobster nesoi fresh chilled naturally d	40	Ad Valorem	
306229020	Lobster,nesoi artificially dried or cook	40	Ad Valorem	
306229030	Lobsters ,nesoi, live	40	Ad Valorem	
306231000	Live, for breeding or rearing	0	Ad Valorem	
306232000	Cultured	40	Ad Valorem	
306233000	Wild	40	Ad Valorem	
306240000	Crabs	40	Ad Valorem	
306291000	Live, for breeding or rearing	0	Ad Valorem	
306292000	Conch	40	Ad Valorem	
306299010	Crustaceans nesoi; fresh, chilled, natur	40	Ad Valorem	
306299020	Crustaceans nesoi fresh chilled, artific	40	Ad Valorem	
306299030	Crustacean, nesoi; live	40	Ad Valorem	
306299090	Flour, meals and pellets of crustacean f	40	Ad Valorem	
307101000	For breeding or rearing	0	Ad Valorem	
307109000	Other	40	Ad Valorem	
307210000	Live, fresh or chilled	40	Ad Valorem	
307290000	Other	40	Ad Valorem	
307410000	Live, fresh or chilled	40	Ad Valorem	
307490000	Other	40	Ad Valorem	
307510000	Live, fresh or chilled	40	Ad Valorem	
307590000	Other	40	Ad Valorem	
307911000	Live, for breeding or rearing	0	Ad Valorem	
307919000	Other	40	Ad Valorem	
307991000	Sea-eggs	40	Ad Valorem	
307999020	**NO DESCRIPTION** - 0.4 -	15	Ad Valorem	

Annex 10

Tariff structure for selected fishery products imported into Guyana (2001)

(Source: Hemispheric Database)

Tariff Line Level	Description	Value	Nature	Preferences
		MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	
301101000	For breeding	0	Ad Valorem	
301109000	Other	40	Ad Valorem	
301910000	Trout (Salmo trutta, Oncorhynchus mykiss, Oncorhynchus clarki, Oncorhynchus aguabonita, Oncorhynchus gilae, Oncorhynchus apache and Oncorhynchus chrysogaster)	40	Ad Valorem	
301920000	Eels (Anguilla spp.)	40	Ad Valorem	
301930000	Carp	40	Ad Valorem	
301991000	For breeding	0	Ad Valorem	
301999000	Other	40	Ad Valorem	
302110000	Trout (Salmo trutta, Oncorhynchus mykiss, Oncorhynchus clarki, Oncorhynchus aguabonita, Oncorhynchus gilae, Oncorhynchus apache and Oncorhynchus chrysogaster)	40	Ad Valorem	
302120000	Pacific salmon (Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou and Oncorhynchus rhodurus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho)	40	Ad Valorem	
302190000	Other	40	Ad Valorem	
302210000	Halibut (Reinhardtius hippoglossoides, Hippoglossus hippoglossus, Hippoglossus stenolepis	40	Ad Valorem	
302220000	Plaice (Pleuronectes platessa)	40	Ad Valorem	
302230000	Soles (Solea spp.)	40	Ad Valorem	
302290000	Other	40	Ad Valorem	
302311000	For processing	0	Ad Valorem	
302319000	Other	40	Ad Valorem	
302321000	For processing	0	Ad Valorem	
302329000	Other	40	Ad Valorem	
302330000	Skipjack or stripe-bellied bonito	40	Ad Valorem	
302390000	Other	40	Ad Valorem	
302401000	For processing	0	Ad Valorem	
302409000	Other	40	Ad Valorem	
302501000	For processing	0	Ad Valorem	
302509000	Other	40	Ad Valorem	
302611000	For processing	0	Ad Valorem	
302619000	Other	40	Ad Valorem	
302621000	For processing	0	Ad Valorem	
302629000	Other	40	Ad Valorem	
302630000	Coalfish (Pollachius virens)	40	Ad Valorem	
302641000	For processing	0	Ad Valorem	
302649000	Other	40	Ad Valorem	
302650000	Dogfish and other sharks	40	Ad Valorem	
302660000	Eels (Anguilla spp.)	40	Ad Valorem	
302691000	Alewives, saithe, pollock, and hake, for processing	0	Ad Valorem	

Annex 10

Tariff structure for selected fishery products imported into Guyana (2001) continued

(Source: Hemispheric Database)

302692000	Snapper, croaker, grouper, dolphin, banga mary and sea trout	40	Ad Valorem	
302693000	Flying fish	40	Ad Valorem	
302699000	Other	40	Ad Valorem	
302700000	Livers and roes	40	Ad Valorem	
303100000	Pacific salmon (Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou and Oncorhynchus rhodurus), excluding livers and roes	40	Ad Valorem	
303210000	Trout (Salmo trutta, Oncorhynchus mykiss, Oncorhynchus clarki, Oncorhynchus aguabonita, Oncorhynchus gilae, Oncorhynchus apache and Oncorhynchus chrysogaster)	40	Ad Valorem	
303220000	Atlantic salmon (Salmon salar) and Danube salmon (Hucho hucho)	40	Ad Valorem	
303290000	Other	40	Ad Valorem	
303310000	Halibut (Reinhardtius hippoglossoides, Hippoglossus hippoglossus, Hippoglossus stenolepis	40	Ad Valorem	
303320000	Plaice (Pleuronectes platessa)	40	Ad Valorem	
303330000	Sole (Solea spp.)	40	Ad Valorem	
303390000	Other	40	Ad Valorem	
303411000	For processing	0	Ad Valorem	
303419000	Other	40	Ad Valorem	
303421000	For processing	0	Ad Valorem	
303429000	Other	40	Ad Valorem	
303430000	Skipjack or stripe-bellied bonito	40	Ad Valorem	
303490000	Other	40	Ad Valorem	
303501000	For processing	0	Ad Valorem	
303509000	Other	40	Ad Valorem	
303601000	For processing	0	Ad Valorem	
303609000	Other	40	Ad Valorem	
303711000	For processing	0	Ad Valorem	
303719000	Other	40	Ad Valorem	
303721000	For processing	0	Ad Valorem	
303729000	Other	40	Ad Valorem	
303730000	Coalfish (Pollachius virens)	40	Ad Valorem	
303741000	For processing	0	Ad Valorem	
303749000	Other	40	Ad Valorem	
303750000	Dogfish and other sharks	40	Ad Valorem	
303760000	Eels (Anguilla spp.)	40	Ad Valorem	
303770000	Sea bass (Dicentrarchus labrax, Dicentrarchus punctatus)	40	Ad Valorem	
303781000	For processing	0	Ad Valorem	
303789000	Other	40	Ad Valorem	
303791000	Alewives, saithe and □ollock, for processing	0	Ad Valorem	
303792000	Snapper, croaker, grouper, dolphin, bangamary and sea trout	40	Ad Valorem	
303793000	Flying fish	40	Ad Valorem	
303801000	Livers	40	Ad Valorem	

Annex 10

Tariff structure for selected fishery products imported into Guyana (2001) continued

(Source: Hemispheric Database)

303802000	Roes	40	Ad Valorem	
304101000	Fillets of flying fish	40	Ad Valorem	
304109000	Other	40	Ad Valorem	
304201000	Flying fish	40	Ad Valorem	
304209000	Other	40	Ad Valorem	
304900000	Other	40	Ad Valorem	
305100000	Flours, meals and pellets of fish, fit for human consumption	20	Ad Valorem	
305200000	Livers and roes, dried, smoked, salted or in brine	20	Ad Valorem	
305300000	Fish fillets, dried, salted or in brine, but not smoked	20	Ad Valorem	
305410000	Pacific salmon (Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou and Oncorhynchus rhodurus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho)	20	Ad Valorem	
305420000	Herrings (Clupea harengus, Clupea pallasii)	35	Ad Valorem	
305491000	Cod, mackerel and alewives	35	Ad Valorem	
305499000	Other	20	Ad Valorem	
305510000	Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	35	Ad Valorem	
305591000	Mackerel	35	Ad Valorem	
305592000	Herrings, alewives, saithe, pollock, haddock and hake	35	Ad Valorem	
305599000	Other	20	Ad Valorem	
305610000	Herrings (Clupea harengus, Clupea pallasii)	35	Ad Valorem	
305620000	Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	35	Ad Valorem	
305630000	Anchovies (Engraulis spp.)	20	Ad Valorem	
305691000	Mackerel	35	Ad Valorem	
305692000	Alewives, saithe, poddock, haddock and hake	35	Ad Valorem	
305699000	Other	20	Ad Valorem	
306110000	Rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.)	40	Ad Valorem	
306120000	Lobster (Homarus spp.)	40	Ad Valorem	
306130000	Shrimps and prawns	40	Ad Valorem	
306140000	Crabs	40	Ad Valorem	
306191000	Conch	40	Ad Valorem	
306192000	Other Crustaceans	40	Ad Valorem	
306199000	Other	40	Ad Valorem	
306211000	Live, for breeding or rearing	0	Ad Valorem	
306221000	Live, for breeding or rearing	0	Ad Valorem	
306229000	Other	40	Ad Valorem	
306231000	Live, for breeding or rearing	0	Ad Valorem	
306232000	Cultured	40	Ad Valorem	
306233000	Wild	40	Ad Valorem	
306240000	Crabs	40	Ad Valorem	
306291000	Live, for breeding or rearing	0	Ad Valorem	
306292000	Conch	40	Ad Valorem	

Annex 10

Tariff structure for selected fishery products imported into Guyana (2001) continued

(Source: Hemispheric Database)

307101000	For breeding or rearing	0	Ad Valorem	
307109000	Other	40	Ad Valorem	
307210000	Live, fresh or chilled	40	Ad Valorem	
307290000	Other	40	Ad Valorem	
307310000	Live, fresh or chilled	40	Ad Valorem	
307390000	Other	40	Ad Valorem	
307410000	Live, fresh or chilled	40	Ad Valorem	
307490000	Other	40	Ad Valorem	
307510000	Live, fresh or chilled	40	Ad Valorem	
307590000	Other	40	Ad Valorem	
307600000	Snails, other than sea snails	40	Ad Valorem	
307911000	Live, for breeding or rearing	0	Ad Valorem	
307919000	Other	40	Ad Valorem	
307991000	Sea-eggs	40	Ad Valorem	
307999000	Other	40	Ad Valorem	

Annex 11

Tariff structure for selected fishery products imported into Suriname (2001)

(Source: Hemispheric Database)

Tariff Line Level	Description	Value	Nature	Preferences
		MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	
301101000	ù ù ù voor het fokken	0	Ad Valorem	
301109000	ù ù ù ander	40	Ad Valorem	
301901000	ù ù ù voor het fokken	0	Ad Valorem	
301909000	ù ù ù ander	40	Ad Valorem	
302100000	ù zalmachtigen (Salmonidae), met uitzondering van levers, hom en kuit	40	Ad Valorem	
302200000	ù platvis (inclusief heilbot, schol en tong), met uitzondering van levers, hom en kuit	40	Ad Valorem	
302301000	ù ù ù voor verwerking (vriezen, drogen, roken, zouten of pekelen)	0	Ad Valorem	
302309000	ù ù ù andere	40	Ad Valorem	
302401000	ù ù ù voor verwerking (vriezen, drogen, roken, zouten of pekelen)	0	Ad Valorem	
302409000	ù ù ù andere	40	Ad Valorem	
302501000	ù ù ù voor verwerking (vriezen, drogen, roken, zouten of pekelen)	0	Ad Valorem	
302509000	ù ù ù andere	40	Ad Valorem	
302601000	ù ù ù makreel voor verwerking (vriezen, drogen, roken, zouten of pekelen)	0	Ad Valorem	
302602000	ù ù ù snapper, haai, zeekoebi, grouper, dolfijn, witwitie, zeeforel	40	Ad Valorem	
302603000	ù ù ù vliegende vis	40	Ad Valorem	
302604000	ù ù ù alosa pseudoharengus, koolvis (pollachius virens), pollak (pollachius pollachius), schelvis en heek, voor verwerking (vriezen, drogen, roken, zouten of pekelen)	0	Ad Valorem	
302609000	ù ù ù andere	40	Ad Valorem	
302700000	ù ù ù levers, hom en kuit	40	Ad Valorem	
303100000	ù Pacifische zalm, met uitzondering van levers, hom en kuit	40	Ad Valorem	
303200000	ù andere zalmachtigen (inclusief forel en andere zalmachtigen), met uitzondering van levers, hom en kuit	40	Ad Valorem	
303300000	ù platvis (inclusief heilbot, schol en tong), met uitzondering van levers, hom en kuit	40	Ad Valorem	
303401000	ù ù ù tonijn voor verwerking (vriezen, drogen, roken, zouten of pekelen)	0	Ad Valorem	
303409000	ù ù ù andere	40	Ad Valorem	
303501000	ù ù ù voor verwerking (vriezen, drogen, roken, zouten of pekelen)	0	Ad Valorem	
303509000	ù ù ù andere	40	Ad Valorem	
303601000	ù ù ù voor verwerking (vriezen, drogen, roken, zouten of pekelen)	0	Ad Valorem	
303609000	ù ù ù andere	40	Ad Valorem	
303701000	ù ù ù makreel voor verwerking (vriezen, drogen, roken, zouten of pekelen)	0	Ad Valorem	
303702000	ù ù ù snapper, haai, zeekoebi, grouper, dolfijn, witwitie, en zeeforel	40	Ad Valorem	
303703000	ù ù ù vliegende vis	40	Ad Valorem	
303704000	ù ù ù alosa pseudoharengus, koolvis (pollachius virens), pollak (pollachius pollachius) schelvis en heek voor verwerking (vriezen, drogen, roken, zouten of pekelen)	0	Ad Valorem	
303709000	ù ù ù andere	40	Ad Valorem	
303801000	ù ù ù levers	40	Ad Valorem	
303802000	ù ù ù hom en kuit	40	Ad Valorem	
304101000	ù ù ù visfilets van vliegende vis	40	Ad Valorem	
304109000	ù ù ù andere	40	Ad Valorem	

Tariff structure for selected fishery products imported into Suriname (2001) continued

(Source: Hemispheric Database)

304201000	ù ù ù van vliegende vis	40	Ad Valorem	
304209000	ù ù ù andere	40	Ad Valorem	
304900000	ù andere	40	Ad Valorem	
305100000	ù meel, poeder en pellets, van vis geschikt voor menselijke consumptie	25	Ad Valorem	
305200000	ù vislevers, hom en kuit, gedroogd, gerookt, gezouten of gepekeld	25	Ad Valorem	
305300000	ù visfilets, gedroogd, gezouten of gepekeld, doch niet gerookt	25	Ad Valorem	
305401000	ù ù ù haring	25	Ad Valorem	
305402000	ù ù ù kabeljauw, makreel en alosa pseudoharengus	25	Ad Valorem	
305403000	ù ù ù zalm	25	Ad Valorem	
305409000	ù ù ù andere	25	Ad Valorem	
305510000	ù ù kabeljauw	25	Ad Valorem	
305591000	ù ù ù makreel, haring, alosa pseudoharengus, koolvis (pollachius virens), pollak (pollachius pollachius) schelvis en heek	25	Ad Valorem	
305599000	ù ù ù andere	25	Ad Valorem	
305601000	ù ù ù kabeljauw, makreel, haring, alosa pseudoharengus, koolvis (pollachius virens), pollak (pollachius pollachius) schelvis en heek	25	Ad Valorem	
305609000	ù ù ù andere	25	Ad Valorem	
306001000	ù ù ù levende, speciaal voor het fokken of kweken	0	Ad Valorem	
306002000	ù ù ù garnalen en steurgarnalen, bevroren	40	Ad Valorem	
306003000	ù ù ù kreeften, bevroren	40	Ad Valorem	
306004000	ù ù ù andere schaaldieren, bevroren	40	Ad Valorem	
306009000	ù ù ù andere	40	Ad Valorem	
307001000	ù ù ù slakken, andere dan zeeslakken	40	Ad Valorem	
307002000	ù ù ù zeeÙgels	40	Ad Valorem	
307003000	ù ù ù andere, levend, speciaal voor het fokken of kweken	0	Ad Valorem	
307009000	ù ù ù andere	40	Ad Valorem	

Annex 12

Tariff structure for selected fishery products imported into The Bahamas (1999)

(Source: Hemispheric Database)

Tariff Line Level	Description	Value MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	Nature MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY
3011010	Fresh water ornamental fish live	0.300000011920929	Ad Valorem
3011020	Salt water ornamental fish live	0.300000011920929	Ad Valorem
3019100	Live trout	0.300000011920929	Ad Valorem
3019200	Live eels (Anguilla spp.)	0.300000011920929	Ad Valorem
3019300	Live carp	0.300000011920929	Ad Valorem
3019910	Live balao, mullet or pilchard, for use as bait	0	Ad Valorem
3019920	Other live (fresh water) fish	0.300000011920929	Ad Valorem
3019990	Other live (salt water) fish	0.300000011920929	Ad Valorem
3021100	Trout fresh or chilled excluding fish fillets	0.300000011920929	Ad Valorem
3021200	Pacific salmon fresh or chilled excluding fish fillets	0.300000011920929	Ad Valorem
3021900	Other salmonidae fresh or chilled excluding fish fillets	0.300000011920929	Ad Valorem
3022100	Halibut fresh or chilled excluding fish fillets	0.300000011920929	Ad Valorem
3022200	Plaice (Pleuronectes platessa) excluding fish fillets	0.300000011920929	Ad Valorem
3022300	Sole (Solea spp.) excluding fish fillets	0.300000011920929	Ad Valorem
3022900	Other flat fish excluding fish fillets	0.300000011920929	Ad Valorem
3023100	Albacore or longfinned tunas (thunnus alalinga) excluding fish fillets	0.300000011920929	Ad Valorem
3023200	Yellowfin tunas (Thunnus albacares) excluding fish fillets	0.300000011920929	Ad Valorem
3023300	Skipjack or stripe-bellied bonito excluding fish fillets excluding fish fillets	0.300000011920929	Ad Valorem
3023900	Other tunas excluding fish fillets	0.300000011920929	Ad Valorem
3024000	Herrings excluding livers and roes excluding fish fillets	0.300000011920929	Ad Valorem
3025000	Cod excluding livers and roes excluding fish fillets	0.300000011920929	Ad Valorem
3026100	Sardines excluding fish fillets	0.300000011920929	Ad Valorem
3026200	Haddock (Melanogrammus aeglefinus) excluding fish fillets	0.300000011920929	Ad Valorem
3026300	Coalfish (Pollachius virens) excluding fish fillets	0.300000011920929	Ad Valorem
3026400	Mackerel excluding fish fillets	0.300000011920929	Ad Valorem
3026500	Dogfish and other sharks excluding fish fillets	0.300000011920929	Ad Valorem
3026600	Eels (Anguilla spp.) excluding fish fillets	0.300000011920929	Ad Valorem
3026910	Balao, mullet and pilchard, for use as bait excluding fish fillets	0	Ad Valorem
3026920	Grouper (Epinephelus, mycteroperca spp.) excluding fish fillets	0.300000011920929	Ad Valorem
3026930	Jack (Caranx spp.) excluding fish fillets	0.300000011920929	Ad Valorem
3026940	Snapper (Lutjanidae) excluding fish fillets	0.300000011920929	Ad Valorem
3026950	Dolphin (Coryphaena hippurus, coryphaena equisetis) excluding fish fillets	0.300000011920929	Ad Valorem
3026960	Kingfish (Scomberomorus cavalla) excluding fish fillets	0.300000011920929	Ad Valorem
3026970	Swordfish (Xiphias gladius) excluding fish fillets	0.300000011920929	Ad Valorem
3026980	Wahoo (Acanthocybiumolanderi) excluding fish fillets	0.300000011920929	Ad Valorem
3026990	Other fish fresh excluding fish fillets	0.300000011920929	Ad Valorem

Annex 12

Tariff structure for selected fishery products imported into The Bahamas (1999) continued

(Source: Hemispheric Database)

3027000	Livers and roes excluding fish fillets	0.300000011920929	Ad Valorem
3031000	Pacific salmon excluding livers & roes frozen and excluding fish fillets	0.300000011920929	Ad Valorem
3032100	Trout excluding livers & roes and excluding fish fillets frozen	0.300000011920929	Ad Valorem
3032200	Atlantic & Danube salmon excluding livers/roes frozen	0.300000011920929	Ad Valorem
3032900	Other salmonidae, excluding livers and roes frozen	0.300000011920929	Ad Valorem
3033100	Halibut frozen excluding fish fillets	0.300000011920929	Ad Valorem
3033200	Plaice (Pleuronectes platessa) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3033300	Sole (Solea spp.) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3033900	Other flat fish frozen excluding fish fillets	0.300000011920929	Ad Valorem
3034100	Albacore or longfinned frozen excluding fish fillets	0.300000011920929	Ad Valorem
3034200	Yellowfin tunas (Thunnus albacares) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3034300	Skipjack or strip-bellied bonito frozen excluding fish fillets	0.300000011920929	Ad Valorem
3034900	Other tunas frozen excluding fish fillets	0.300000011920929	Ad Valorem
3035000	Herrings, excluding livers and roes frozen excluding fish fillets	0.300000011920929	Ad Valorem
3036000	Cod excluding livers and roes frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037100	Sardines sardinella brisling or sprats excluding fish fillets frozen	0.300000011920929	Ad Valorem
3037200	Haddock (Melanogrammus aeglefinus) excluding fish fillets frozen	0.300000011920929	Ad Valorem
3037300	Coalfish (Pollachius virens) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037400	Mackerel frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037500	Dogfish and other sharks frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037600	Eels (Anguilla spp.) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037700	Sea bass (Dicentrarchus labrax,) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037800	Hake (Merluccius spp., Urophycis spp.) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037910	Balao, mullet and pilchard for use as bait frozen excluding fish fillets	0	Ad Valorem
3037920	Grouper (Epinephelus, mycteroperca spp.) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037930	Jack (Caranx spp.) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037940	Snapper (Lutjanidae) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037950	Dolphin (coryphaena hippurus,) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037960	Kingfish (scombgromorus cavalla) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037970	Swordfish (Xiphias gladius) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037980	Wahoo (Acanthocybium solanderi) frozen excluding fish fillets	0.300000011920929	Ad Valorem
3037990	Other fish excluding liver and roes frozen excluding fish fillets	0.300000011920929	Ad Valorem
3038000	Livers and roes excluding fish fillets	0.300000011920929	Ad Valorem
3041010	Grouper fillets fresh or chilled (whether or not minced)	0.300000011920929	Ad Valorem

Annex 12

Tariff structure for selected fishery products imported into The Bahamas (1999) continued

(Source: Hemispheric Database)

3041020	Jack fillets fresh or chilled (whether or not minced)	0.300000011920929	Ad Valorem
3041030	Snapper fillet fresh or chilled (whether or not minced)	0.300000011920929	Ad Valorem
3041090	Other fish fillet fresh or chilled (whether or not minced)	0.300000011920929	Ad Valorem
3042010	Grouper fillets frozen (whether or not minced)	0.300000011920929	Ad Valorem
3042020	Jack fillets frozen (whether or not minced)	0.300000011920929	Ad Valorem
3042030	Snapper fillets frozen (whether or not minced)	0.300000011920929	Ad Valorem
3042090	Other fish fillet, fish meat frozen (whether or not minced)	0.300000011920929	Ad Valorem
3049000	Other fish fillets and fish meat (whether or not minced)	0.300000011920929	Ad Valorem
3051000	Flours, meals and pellets of fish , fit for human consumption	0.300000011920929	Ad Valorem
3052000	Fish livers and roes, dried, smoked, salted in brine	0	Ad Valorem
3053000	Fish fillets, dried, salted or in brine not smoked	0	Ad Valorem
3054100	Smoked Pacific salmon, Atlantic salmon, and Danube salmon including fillets	0	Ad Valorem
3054200	Smoked Herrings including fillets	0	Ad Valorem
3054900	Other smoked fish including fillets	0	Ad Valorem
3055100	Cod dried, whether or not salted, not smoked	0	Ad Valorem
3055900	Other dried fish, whether or not salted not smoked	0	Ad Valorem
3056100	Herrings, salted not dried or smoked in brine	0	Ad Valorem
3056200	Cod, salted not dried or smoked in brine	0	Ad Valorem
3056300	Anchovies (Engraulis spp.)	0	Ad Valorem
3056900	Other fish salted not dried or smoked in brine	0	Ad Valorem
3061110	Spiny lobsters whole frozen (Panulirus argus)	0.300000011920929	Ad Valorem
3061120	Frozen spiney lobster heads (panulirus argus)	0.300000011920929	Ad Valorem
3061130	Frozen spiney lobster tails (panulirus argus)	0.300000011920929	Ad Valorem
3061140	Frozen spiney lobster meat (panulirus argus)	0.300000011920929	Ad Valorem
3061150	Other frozen spiney lobsters(panulirus argus)	0.300000011920929	Ad Valorem
3061190	Spiney lobsters pellets meals flour (panulirus argus)	0.300000011920929	Ad Valorem
3061200	Lobsters (Homarus spp.) frozen	0.300000011920929	Ad Valorem
3061310	Shrimps frozen	0.300000011920929	Ad Valorem
3061320	Prawns frozen	0.300000011920929	Ad Valorem
3061410	Stone crab claws frozen	0.300000011920929	Ad Valorem
3061420	Land crabs frozen	0.300000011920929	Ad Valorem
3061490	Other marine crabs frozen	0.300000011920929	Ad Valorem
3061900	Other crabs including flours, meals & crustaceans	0.300000011920929	Ad Valorem
3062110	Spiny lobsters, live (Panulirus argus)	0.300000011920929	Ad Valorem
3062120	Spiny lobsters, whole fresh and chilled (panulirus argus)	0.300000011920929	Ad Valorem
3062130	Spiney lobsters heads fresh or chilled	0.300000011920929	Ad Valorem
3062140	Spiney lobsters, tails, fresh or chilled	0.300000011920929	Ad Valorem
3062150	Spiney lobsters, meat fresh or chilled	0.300000011920929	Ad Valorem
3062160	Other Spiney lobsters, fresh or chilled	0.300000011920929	Ad Valorem

Annex 12

Tariff structure for selected fishery products imported into The Bahamas (1999) continued

(Source: Hemispheric Database)

3062190	Other rock lobsters and other sea crawfish fresh or chilled	0.300000011920929	Ad Valorem
3062200	Lobsters (Homarus spp.) fresh or chilled	0.300000011920929	Ad Valorem
3062310	Shrimps, live, for use as bait	0.150000005960464	Ad Valorem
3062320	Other Shrimps not frozen	0.300000011920929	Ad Valorem
3062390	Prawns not frozen	0.300000011920929	Ad Valorem
3062400	Crabs not frozen	0.300000011920929	Ad Valorem
3062900	Other, prawns including flours, meals and custaceans	0.300000011920929	Ad Valorem
3071000	Oysters	0.300000011920929	Ad Valorem
3072100	Scallops live, fresh or chilled	0.300000011920929	Ad Valorem
3072900	Other scallops	0.300000011920929	Ad Valorem
3073100	Mussels live, fresh or chilled	0.300000011920929	Ad Valorem
3073900	Other mussels	0.300000011920929	Ad Valorem
3074100	Cuttlefish live, fresh or chilled	0.300000011920929	Ad Valorem
3074900	Other cuttlefish	0.300000011920929	Ad Valorem
3075100	Octopus live, fresh or chilled	0.300000011920929	Ad Valorem
3075900	Other octupus	0.300000011920929	Ad Valorem
3076000	Snails, other than sea snails	0.300000011920929	Ad Valorem
3079110	Conch, live (strombus)	0.300000011920929	Ad Valorem
3079120	Conch, fresh or chilled (strombus)	0.300000011920929	Ad Valorem
3079190	Other flours, meals of Aquatic Invertebrate Crustacean	0.300000011920929	Ad Valorem
3079910	Conch, frozen (strombus)	0.300000011920929	Ad Valorem
3079920	Other conch (strombus)	0.300000011920929	Ad Valorem
3079990	Other flours, meals and Aquatic invertibrates	0.300000011920929	Ad Valorem

Annex 13

Tariff structure for selected fishery products imported into the USA (2001)

(Source: Hemispheric Database)

Tariff Line Level	Description	Value	Nature	Preferences
		MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	
3011000	Live ornamental fish	0	Ad Valorem	
3019100	Live trout	0	Ad Valorem	
3019200	Live eels	0	Ad Valorem	
3019300	Live carp	0	Ad Valorem	
3019900	Live fish, other than trout, eel, carp or ornamental fish	0	Ad Valorem	
3021100	Trout, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3021200	Pacific, Atlantic and Danube salmon, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3021900	Salmonidae other than trout or Pacific, Atlantic & Danube salmon, fresh or chilled, excluding fillets, other meat portions, livers & roes	0	Ad Valorem	
3022100	Halibut and Greenland turbot, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3022200	Plaice, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3022300	Sole, fresh or chilled, excluding fillets, other meat portions, livers and roes	1.1 cents/kg	Non Ad Valorem	Preferences
3022900	Flat fish, nesi, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3023100	Albacore or longfinned tunas, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3023200	Yellowfin tunas, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3023300	Skipjack or stripe-bellied bonito, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3023400	Bigeye tunas (Thunnas obesus), fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3023500	Bluefin tunas (Thunnas thynnus), fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3023600	Sourther bluefin tunas (Thunnas maccoyii), fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3023901	Tunas not elsewhere specified or included, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3024000	Herrings, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3025000	Cod, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3026100	Sardines, sardinella, brisling or sprats, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3026200	Haddock, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3026300	Atlantic pollock, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3026400	Mackerel, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3026500	Dogfish and other sharks, fresh or chilled, excluding fillets, livers, roes and fish meat of 0304	0	Ad Valorem	
3026600	Eels, fresh or chilled, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3026910	Fish, nesi, excl. fillets, livers and roes, fresh or chilled, scaled, in immediate containers weighing with their contents 6.8 kg or less	3	Ad Valorem	Preferences
3026920	Smelts, cusk, hake, etc. excl. fillets, livers & roes, fresh or chilled, not scaled, or scaled in immediate containers over 6.8 kg	0	Ad Valorem	
3026940	Fish, nesi, excl. fillets, livers and roes, fresh or chilled, not scaled, or scaled in immediate containers weighing over 6.8 kg	0	Ad Valorem	
3027020	Sturgeon roe, fresh or chilled	15	Ad Valorem	Preferences
3027040	Fish roes and livers, other than sturgeon, fresh or chilled	0	Ad Valorem	
3031100	Sockeye salmon (red salmon) (Orncorhynchus nerka), frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3031900	Pacific salmon, other than sockeye, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3032100	Trout, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	

Annex 13

Tariff structure for selected fishery products imported into the USA (2001)

Continued (Source: Hemispheric Database)

3032200	Atlantic salmon and Danube salmon, frozen, excluding livers and roes	0	Ad Valorem	
3032900	Salmonidae, other than trout or Atlantic and Danube salmon, nesi, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3033100	Halibut and Greenland turbot, frozen, excluding fillets, other meat portions & livers and roes	0	Ad Valorem	
3033200	Plaice, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3033300	Sole, frozen, excluding fillets, other meat portions, livers and roes	1.1 cents/kg	Non Ad Valorem	Preferences
3033900	Flat fish, other than halibut, Greenland turbot, plaice and sole, frozen, excluding fillets, other meat portions, livers and roes	1.1 cents/kg	Non Ad Valorem	Preferences
3034100	Albacore or longfinned tunas, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3034200	Yellowfin tunas, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3034300	Skipjack or stripe-bellied bonito, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3034400	Bigeye tunas (Thunnas obesus), frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3034500	Bluefin tunas (Thunnas thynnus), frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3034600	Sourther bluefin tunas (Thunnas maccoyii), frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3034901	Tunas, not elsewhere specified or included, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3035000	Herrings, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3036000	Cod, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3037100	Sardines, sardinella, brisling or sprats, frozen, excluding fillets, other meat portions, livers and roes	1.1 cents/kg	Non Ad Valorem	Preferences
3037200	Haddock, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3037300	Atlantic pollock, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3037400	Mackerel frozen excluding fillets, livers and roes	0	Ad Valorem	
3037500	Dogfish and other sharks, frozen, excluding fillets, livers, roes and fish meat of 0304	1.1 cents/kg	Non Ad Valorem	Preferences
3037600	Eels, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3037700	Sea bass, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3037800	Whiting and hake, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3037920	Smelts, cusk, pollock, shad, sturgeon, swordfish, and fresh-water fish, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3037940	Fish, nesi, frozen, excluding fillets, other meat portions, livers and roes	0	Ad Valorem	
3038020	Sturgeon roe, frozen	15	Ad Valorem	Preferences
3038040	Fish livers and roes, other than sturgeon roe, frozen	0	Ad Valorem	
3041010	Cod, cusk, haddock, pollock, Atlantic ocean perch, filleted or minced, fresh or chilled	0	Ad Valorem	
3041030	Hake, filleted or minced, fresh or chilled	0	Ad Valorem	
3041040	Fillets and other meat portions of other fish nesi, fresh or chilled	0	Ad Valorem	
3042020	Frozen fish fillets, skinned, in blocks weighing over 4.5 kg, to be minced, ground or cut into pieces of uniform weight and dimension	0	Ad Valorem	
3042030	Fillets and minced meat, frozen, of cod, cusk, haddock, pollock or Atlantic ocean perch	0	Ad Valorem	
3042060	Frozen fillets of fresh-water fish, flat fish, etc., nesi	0	Ad Valorem	
3049010	Frozen fish meat (excluding fillets), in bulk or in immediate containers weighing with their contents over 6.8 kg each	0	Ad Valorem	
3049090	Frozen fish meat (excluding fillets), other than in bulk or in immediate containers weighing with their contents over 6.8 kg each	6	Ad Valorem	Preferences
3051020	Flours, meals and pellets of fish, fit for human consumption, in bulk or in immediate containers weighing with contents over 6.8 kg each	0	Ad Valorem	
3051040	Flours, meals and pellets of fish, fit for human consumption, other than in bulk or immediate containers weighing contents over 6.8 kg each	6	Ad Valorem	Preferences
3052020	Sturgeon roe, dried, smoked, salted or in brine	7.5	Ad Valorem	Preferences
3052040	Fish livers and roes, other than sturgeon roe, dried, smoked, salted or in brine	0	Ad Valorem	
3053020	Fillets of herrings, dried, salted or in brine, but not smoked, in immediate containers weighing with their contents 6.8 kg or less each	4	Ad Valorem	Preferences
3053040	Fillets of mackerel, dried, salted or in brine, but not smoked, in immediate containers weighing with their contents 6.8 kg or less each	5	Ad Valorem	Preferences

Annex 13

Tariff structure for selected fishery products imported into the USA (2001)

Continued (Source: Hemispheric Database)

3053060	Fish fillets, nesi, dried, salted or in brine, but not smoked	0	Ad Valorem	
3054100	Smoked Pacific, Atlantic and Danube salmon, including fillets	5	Ad Valorem	Preferences
3054200	Smoked herrings, including fillets	0	Ad Valorem	
3054920	Smoked mackerel, including fillets	0	Ad Valorem	
3054940	Smoked fish, including fillets, other than Pacific, Atlantic and Danube salmon, herrings or mackerel	0	Ad Valorem	
3055100	Dried cod, whether or not salted but not smoked	0	Ad Valorem	
3055920	Dried shark fins, whether or not salted but not smoked	0	Ad Valorem	
3055940	Dried fish, other than cod or shark fins, whether or not salted but not smoked	0	Ad Valorem	
3056120	Herrings, in brine or salted but not dried or smoked, in immediate containers weighing with their contents 6.8 kg or less each	4	Ad Valorem	Preferences
3056140	Herrings, in brine or salted but not dried or smoked, other than in immediate containers weighing with their contents 6.8 kg or less each	0	Ad Valorem	
3056200	Cod, in brine or salted but not dried or smoked	0	Ad Valorem	
3056320	Anchovies, in brine or salted but not dried or smoked, in immediate airtight containers weighing with their contents 6.8 kg or less each	5	Ad Valorem	Preferences
3056340	Anchovies, in brine or salted but not dried or smoked, in immediate containers, nesi, weighing with their contents 6.8 kg or less each	0	Ad Valorem	
3056360	Anchovies, in brine or salted but not dried or smoked, other than in immediate containers weighing with their contents 6.8 kg or less each	0	Ad Valorem	
3056910	Cusk, haddock, hake, and pollock, in brine or salted but not dried or smoked	0	Ad Valorem	
3056920	Mackerel, in brine or salted but not dried or smoked, in immediate containers weighing with their contents 6.8 kg or less each	5	Ad Valorem	Preferences
3056930	Mackerel, in brine or salted but not dried or smoked, other than in immediate containers weighing with their contents 6.8 kg or less each	0	Ad Valorem	
3056940	Salmon, in brine or salted but not dried or smoked	3	Ad Valorem	Preferences
3056950	Fish, nesi, in brine or salted but not dried or smoked, in immediate containers weighing with their contents 6.8 kg or less each	0	Ad Valorem	
3056960	Fish, nesi, in brine or salted but not dried or smoked, other than in immediate containers weighing with their contents 6.8 kg or less each	0.5	Ad Valorem	Preferences
3061100	Rock lobster and other sea crawfish, cooked in shell or uncooked, dried, salted or in brine, frozen	0	Ad Valorem	
3061200	Lobsters excluding rock lobster, cooked in shell or uncooked, dried, salted or in brine, frozen	0	Ad Valorem	
3061300	Shrimps and prawns, cooked in shell or uncooked, dried, salted or in brine, frozen	0	Ad Valorem	
3061420	Crabmeat, frozen	7.5	Ad Valorem	Preferences
3061440	Crabs, cooked in shell or uncooked (whether in shell or not), dried, salted or in brine, frozen	0	Ad Valorem	
3061900	Crustateans, nesi (including flours, meals and pellets of crustaceans fit for human consumption), cooked in shell or uncooked, etc., frozen	0	Ad Valorem	
3062100	Rock lobster and other sea crawfish, live, cooked in shell, or uncooked, dried, salted or in brine, not frozen	0	Ad Valorem	
3062200	Lobsters, (Homarus spp.), live, cooked in shell, or uncooked, dried, salted or in brine, not frozen	0	Ad Valorem	
3062300	Shrimps and prawns, live, cooked in shell, or uncooked (whether in shell or not), dried, salted or in brine, not frozen	0	Ad Valorem	
3062420	Crabmeat, not frozen	7.5	Ad Valorem	Preferences
3062440	Crabs, live, cooked in shell, or uncooked (whether in shell or not), dried, salted or in brine, not frozen	0	Ad Valorem	
3062900	Crustaceans, nesi, live, cooked in shell, uncooked, dried, salted, in brine, not frozen	0	Ad Valorem	
3071000	Oysters, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine	0	Ad Valorem	
3072100	Scallops, including queen scallops, whether in shell or not, live, fresh or chilled	0	Ad Valorem	
3072900	Scallops, including queen scallops, whether in shell or not, frozen, dried, salted or in brine	0	Ad Valorem	
3073100	Mussels, whether in shell or not, live, fresh or chilled	0	Ad Valorem	
3075900	Octopus, frozen, dried, salted or in brine	0	Ad Valorem	
3076000	Snails, other than sea snails, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine	5	Ad Valorem	Preferences
3079100	Molluscs and other aquatic invertebrates, excluding crustaceans, nesi, whether in shell or not, live, fresh or chilled	0	Ad Valorem	
3079900	Molluscs and other aquatic invertebrates, excluding crustaceans, whether in shell or not, frozen, dried, salted or in brine	0	Ad Valorem	

Annex 14

Tariff structure for selected fishery products imported into Canada (2001)

(Source: Hemispheric Database)

Tariff Line Level	Description	Value	Nature	Preferences
		MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	MFN STATUTORY (LEGAL/AUTONOMOUS) DUTY	
3011000	Ornamental fish	0	Ad Valorem	Preferences
3019100	Trout (Salmo trutta, Oncorhynchus mykiss, Oncorhynchus clarki, Oncorhynchus aguabonita, Oncorhynchus gilae, Oncorhynchus apache and Oncorhynchus chrysogaster)	0	Ad Valorem	Preferences
3019200	Eels (Anguilla spp.)	0	Ad Valorem	Preferences
3019300	Carp	0	Ad Valorem	Preferences
3019900	Other	0	Ad Valorem	Preferences
3021100	Trout (Salmo trutta, Oncorhynchus mykiss, Oncorhynchus clarki, Oncorhynchus aguabonita, Oncorhynchus gilae, Oncorhynchus apache and Oncorhynchus chrysogaster)	0	Ad Valorem	Preferences
3021200	Pacific salmon (Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou and Oncorhynchus rhodurus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho)	0	Ad Valorem	Preferences
3021900	Other	0	Ad Valorem	Preferences
3022100	Halibut (Reinhardtius hippoglossoides, Hippoglossus hippoglossus, Hippoglossus stenolepis)	0	Ad Valorem	Preferences
3022200	Plaice (Pleuronectes platessa)	0	Ad Valorem	Preferences
3022300	Sole (Solea spp.)	0	Ad Valorem	Preferences
3022900	Other	0	Ad Valorem	Preferences
3023100	Albacore or longfinned tunas (Thunnus alalunga)	0	Ad Valorem	Preferences
3023200	Yellowfin tunas (Thunnus albacares)	0	Ad Valorem	Preferences
3023300	Skipjack or stripe-bellied bonito	0	Ad Valorem	Preferences
3023400	Bigeye tunas (Thunnus obesus)	0	Ad Valorem	Preferences
3023500	Bluefin tunas (Thunnus thynnus)	0	Ad Valorem	Preferences
3023600	Southern bluefin tunas (Thunnus maccoyii)	0	Ad Valorem	Preferences
3023900	Other	0	Ad Valorem	Preferences
3024000	Herrings (Clupea harengus, Clupea pallasii), excluding livers and roes	0	Ad Valorem	Preferences
3025000	Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), excluding livers and roes	0	Ad Valorem	Preferences
3026100	Sardines (Sardina pilchardus, Sardinops spp.), sardinella (Sardinella spp.), brisling or sprats (Sprattus sprattus)	0	Ad Valorem	Preferences
3026200	Haddock (Melanogrammus aeglefinus)	0	Ad Valorem	Preferences
3026300	Coalfish (Pollachius virens)	0	Ad Valorem	Preferences
3026400	Mackerel (Scomber scombrus, Scomber australasicus, Scomber japonicus)	0	Ad Valorem	Preferences
3026500	Dogfish and other sharks	0	Ad Valorem	Preferences
3026600	Eels (Anguilla spp.)	0	Ad Valorem	Preferences
3026900	Other	0	Ad Valorem	Preferences
3027000	Livers and roes	3	Ad Valorem	Preferences
3031100	Sockeye salmon (red salmon) (Oncorhynchus nerka)	0	Ad Valorem	Preferences
3031900	Other	0	Ad Valorem	Preferences
3032100	Trout (Salmo trutta, Oncorhynchus mykiss, Oncorhynchus clarki, Oncorhynchus aguabonita, Oncorhynchus gilae, Oncorhynchus apache and Oncorhynchus chrysogaster)	0	Ad Valorem	Preferences

Annex 14

Tariff structure for selected fishery products imported into Canada (2001) continued

3032200	Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho)	0	Ad Valorem	Preferences
3032900	Other	0	Ad Valorem	Preferences
3033100	Halibut (Reinhardtius hippoglossoides, Hippoglossus hippoglossus, Hippoglossus stenolepis)	0	Ad Valorem	Preferences
3033200	Plaice (Pleuronectes platessa)	0	Ad Valorem	Preferences
3033300	Sole (Solea spp.)	0	Ad Valorem	Preferences
3033900	Other	0	Ad Valorem	Preferences
3034100	Albacore or longfinned tunas (Thunnus alalunga)	0	Ad Valorem	Preferences
3034200	Yellowfin tunas (Thunnus albacares)	0	Ad Valorem	Preferences
3034300	Skipjack or stripe-bellied bonito	0	Ad Valorem	Preferences
3034400	Bigeye tunas (Thunnus obesus)	0	Ad Valorem	Preferences
3034500	Bluefin tunas (Thunnus thynnus)	0	Ad Valorem	Preferences
3034600	Southern bluefin tunas (Thunnus maccoyii)	0	Ad Valorem	Preferences
3034900	Other	0	Ad Valorem	Preferences
3035000	Herrings (Clupea harengus, Clupea pallasii), excluding livers and roes	0	Ad Valorem	Preferences
3036000	Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), excluding livers and roes	0	Ad Valorem	Preferences
3037100	Sardines (Sardina pilchardus, Sardinops spp.), sardinella (Sardinella spp.), brisling or sprats (Sprattus sprattus)	0	Ad Valorem	Preferences
3037200	Haddock (Melanogrammus aeglefinus)	0	Ad Valorem	Preferences
3037300	Coalfish (Pollachius virens)	0	Ad Valorem	Preferences
3037400	Mackerel (Scomber scombrus, Scomber australasicus, Scomber japonicus)	0	Ad Valorem	Preferences
3037500	Dogfish and other sharks	0	Ad Valorem	Preferences
3037600	Eels (Anguilla spp.)	0	Ad Valorem	Preferences
3037700	Sea bass (Dicentrarchus labrax, Dicentrarchus punctatus)	0	Ad Valorem	Preferences
3037800	Hake (Merluccius spp., Urophycis spp.)	0	Ad Valorem	Preferences
3037900	Other	0	Ad Valorem	Preferences
3038000	Livers and roes	3	Ad Valorem	Preferences
3041000	Fresh or chilled	0	Ad Valorem	Preferences
3042000	Frozen fillets	0	Ad Valorem	Preferences
3049000	Other	0	Ad Valorem	Preferences
3051000	Flours, meals and pellets of fish, fit for human consumption	0	Ad Valorem	Preferences
3052000	Livers and roes of fish, dried, smoked, salted or in brine	3	Ad Valorem	Preferences
3053000	Fish fillets, dried, salted or in brine, but not smoked	0	Ad Valorem	Preferences
3054100	Pacific salmon (Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou and Oncorhynchus rhodurus), Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho)	0	Ad Valorem	Preferences
3054200	Herrings (Clupea harengus, Clupea pallasii)	0	Ad Valorem	Preferences
3054900	Other	0	Ad Valorem	Preferences
3055100	Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	0	Ad Valorem	Preferences
3055900	Other	0	Ad Valorem	Preferences
3056100	Herrings (Clupea harengus, Clupea pallasii)	0	Ad Valorem	Preferences
3056200	Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	0	Ad Valorem	Preferences
3056300	Anchovies (Engraulis spp.)	0	Ad Valorem	Preferences

Annex 14

Tariff structure for selected fishery products imported into Canada (2001) continued

3056900	Other	0	Ad Valorem	Preferences
3061100	Rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.)	5	Ad Valorem	Preferences
3061200	Lobsters (Homarus spp.)	0	Ad Valorem	Preferences
3061300	Shrimps and prawns	0	Ad Valorem	Preferences
3061410	King or snow for processing	0	Ad Valorem	Preferences
3061490	Other	5	Ad Valorem	Preferences
3061900	Other, including flours, meals and pellets of crustaceans, fit for human consumption	5	Ad Valorem	Preferences
3062100	Rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.)	5	Ad Valorem	Preferences
3062200	Lobsters (Homarus spp.)	0	Ad Valorem	Preferences
3062300	Shrimps and prawns	0	Ad Valorem	Preferences
3062400	Crabs	5	Ad Valorem	Preferences
3062900	Other, including flours, meals and pellets of crustaceans, fit for human consumption	5	Ad Valorem	Preferences
3071010	In shell	3	Ad Valorem	Preferences
3071020	Shelled	0	Ad Valorem	Preferences
3072100	Live, fresh or chilled	0	Ad Valorem	Preferences
3072910	Frozen	0	Ad Valorem	Preferences
3072920	Dried, salted or in brine	4	Ad Valorem	Preferences
3073100	Live, fresh or chilled	0	Ad Valorem	Preferences
3073900	Other	0	Ad Valorem	Preferences
3074100	Live, fresh or chilled	0	Ad Valorem	Preferences
3074900	Other	0	Ad Valorem	Preferences
3075100	Live, fresh or chilled	0	Ad Valorem	Preferences
3075900	Other	0	Ad Valorem	Preferences
3076000	Snails, other than sea snails	0	Ad Valorem	Preferences
3079100	Live, fresh or chilled	0	Ad Valorem	Preferences
3079900	Other	0	Ad Valorem	Preferences

Annex 15

Source: FAO

Subsidies in set 1 are **government financial transfers that reduce the costs and/or increase the revenues** of producers in the short term. These include direct payments by government to or on behalf of producers, for example, grant to purchase or modernize vessels and income support payments.

Subsidies in set 2 are government interventions (includes set 1 subsidies) - regardless of whether or not they involve financial transfers - that reduce the costs and/or increase the revenues of producers in the short term. These includes tax waivers and deferrals, as well as insurance, loans and loan guarantees provided by government; government provision of goods and services at below market prices.

Subsidies in set 3 includes set 2 subsidies plus the short-term benefits to producers that result from the absence or lack of interventions by government to correct distortions (imperfections) in production and markets, which can potentially affect fishery resources and trade. These includes the implicit benefits to producers that are associated with a lack of government regulations requiring producers to bear the costs that they impose on other parties, including the costs on the environment and natural resources. When the costs imposed on others do not have to be paid for, the cost of production is lower, which in turn influences the amounts of fish produced and traded as well as the health of resource stocks. Such implicit benefits are present where government does not require measures to reduce the catch of, for example, sea turtles, sea birds or marine mammals. In such cases, producers impose costs on others, in the form of damage to the environment, which they do not pay for and do not take into account in their production decisions. Another example is where government does not do enough to prevent the overexploitation of a fishery resource. In this case, producers avoid paying for the costs of harvesting the resource in the short term, while imposing costs on others - and themselves - in the long term. Both the sustainability of the resources and the trade in fish are thereby affected.

Subsidies in set 4 are government interventions, or the absence of correcting interventions, that affect the costs and/or revenues of producing and marketing fish and fish products in the short, medium or long term. These includes all set 3 subsidies plus such interventions as management measures that may decrease (or increase) the short-term benefits to producers but that result in an increase (or decrease) in long-term benefits to producers. An example is where closure of a fishery (or an area of a fishery), which imposes short-term losses on producers, ultimately results in a rebuilt resource stock and higher long-term benefits to producers. Set 4 subsidies explicitly account for the effects over time of government interventions and the absence of correcting interventions. The effects on benefits to producers in the short term may be the opposite of the long-term effects.

Annex 16

Companies authorised to export Fish and fishery products to the EU

Source: GLOBEFISH. Companies authorised to export Fish and fishery products to the EU
http://forum.europa.eu.int/irc/sanco/vets/info/data/listes/ffp.html

COMMISSION DECISION
of 23 December 2003
laying down special conditions governing imports of fishery products from Guyana
(notified under document number C(2003) 5044)

(Text with EEA relevance)
(2004/40/EC) Council Directive 91/493/EEC of 22 July 1991 laying down the health conditions for the production and the placing on the market of fishery products (1), and in particular Article 11 thereof,

Whereas:
(1) An inspection has been carried out on behalf of the Commission in Guyana to verify the conditions under which fishery products are produced, stored and dispatched to the Community.

(2) The requirements in the legislation of Guyana on health inspection and monitoring of fishery products may be considered equivalent to those laid down in Directive 91/493/EEC.

(3) In particular, the Veterinary Public Health Unit (VPHU), is capable of effectively verifying the implementation of the legislation in force.

(4) The VPHU has provided official assurances regarding compliance with the standards for health controls and monitoring of fishery products as set out in Chapter V of the Annex to Directive 91/493/EEC and regarding the fulfilment of hygienic requirements equivalent to those laid down by that Directive.

(5) It is appropriate to lay down detailed provisions concerning fishery products imported into the Community from Guyana, in accordance with Directive 91/493/EEC.

(6) It is also necessary to draw up a list of approved establishments, factory vessels, or cold stores, and a list of freezer vessels equipped in accordance with the requirements of Council Directive 92/48/EEC of 16 June 1992 laying down the minimum hygiene rules applicable to fishery products caught on board of certain vessels in accordance with Article 3(1)(a)(i) of Directive 91/493/EEC (2). Those lists should be drawn up on the basis of a communication from the VPHU to the Commission.

(7) Since the imports of fishery products from Guyana will be authorized for the first time by the present decision there is no need for a transitional period, and a period of three days is sufficient to ensure the publicity of the authorization. Therefore, imports from this country may be permitted three days after the publication of the present Decision in the *Official Journal of the European Union*.

(8) The measures provided for in this Decision are in accordance with the opinion of the Standing Committee on the Food Chain and Animal Health,

HAS ADOPTED THIS DECISION:
Article 1
The Veterinary Public Health Unit (VPHU), shall be the competent authority in Guyana identified for the purposes of verifying and certifying compliance of fishery products with the requirements of Directive 91/493/EEC.

Article 2
Fishery products imported into the Community from Guyana shall meet the requirements set out in Articles 3, 4 and 5.

Article 3
1. Each consignment shall be accompanied by a numbered original health certificate in accordance with the model set out in Annex I and comprising a single sheet, duly completed, signed and dated.
2. The health certificate shall be drawn up in at least one official language of the Member State where the checks are carried out.
3. The health certificate shall bear the name, capacity and signature of the representative of the VPHU, and the latter's official stamp in a colour different from that of the endorsements.

Article 4
The fishery products shall come from approved establishments, factory vessels, or cold stores, or from registered freezer vessels listed in Annex II.
(1) OJ L 268, 24.9.1991, p. 15. Directive as last amended by Regulation (EC) No 806/2003 (OJ L 122, 16.5.2003, p. 1).
(2) OJ L 187, 7.7.1992, p. 41.
SP/002 Noble House Seafood – Guyana Approved
Source: http://forum.europa.eu.int/irc/sanco/vets/info/data/listes/11gy.pdf

Annex 17

Companies authorised to export Fish and fishery products to the EU (Continued)

COMMISSION DECISION
of 15 October 2003
laying down special conditions governing imports of fishery products from Belize
(notified under document number C(2003) 3645)

(Text with EEA relevance)
(2003/759/EC)

THE COMMISSION OF THE EUROPEAN COMMUNITIES,

Having regard to the Treaty establishing the European Community, Having regard to Council Directive 91/493/EEC of 22 July 1991 laying down the health conditions for the production and the placing on the market of fishery products (1), as last amended by Regulation (EC) No 806/2003 (2), and in particular Article 11 thereof,

Whereas:
(1) An inspection has been carried out on behalf of the Commission in Belize to verify the conditions under which fishery products are produced, stored and dispatched to the Community.

(2) The requirements in the legislation of Belize on health inspection and monitoring of fishery products may be considered equivalent to those laid down in Directive 91/493/EEC.

(3) In particular, the Belize Agricultural Health Authority (BAHA), is capable of effectively verifying the implementation of the legislation in force.

(4) The BAHA has provided official assurances regarding compliance with the standards for health controls and monitoring of fishery products as set out in Chapter V of the Annex to Directive 91/493/EEC and regarding the fulfilment of hygienic requirements equivalent to those laid down by that Directive.

(5) It is appropriate to lay down detailed provisions concerning fishery products imported into the Community from Belize, in accordance with Directive 91/493/EEC.

(6) It is necessary also to draw up a list of approved establishments, factory vessels, or cold stores, and a list of freezer vessels equipped in accordance with the requirements of Council Directive 92/48/EEC of 16 June 1992 laying down the minimum hygiene rules applicable to fishery products caught on board certain vessels in accordance with Article 3(1)(a)(i) of Directive 91/493/EEC (3). These lists should be drawn up on the basis of a
communication from the BAHA to the Commission.

(7) It is appropriate for the present decision to be applied 45 days after its publication to provide for the necessary transitional period.
(8) The measures provided for in this decision are in accordance with the opinion of the Standing Committee on the Food Chain and Animal Health,

HAS ADOPTED THIS DECISION:
Article 1
The Belize Agricultural Health Authority (BAHA), shall be the competent authority in Belize identified for the purposes of verifying and certifying compliance of fishery products with the requirements of Directive 91/493/EEC.

Article 2
Fishery products imported into the Community from Belize shall meet the requirements set out in Articles 3, 4 and 5.
(1) OJ L 268, 24.9.1991, p. 15.
(2) OJ L 122, 16.5.2003, p. 1. (3) OJ L 187, 7.7.1992, p. 41.

Nova Companies (Belize) Ltd – Processing Plant Approved No. BZZ-FP-Nov-001.

http://forum.europa.eu.int/irc/sanco/vets/info/data/listes/11bz.pdf

Annex 18

Companies authorised to export Fish and fishery products to the EU (Continued)

ANNEXE/ANNEX
Bruxelles, le 12 janvier 2004
E3 D(03)530060 RM/agm
PAYS / COUNTRY : JAMAIQUE / JAMAICA
PRODUIT / PRODUCT : PRODUITS DE LA PÊCHE / FISHERY PRODUCTS
MODIFICATION DE L'ANNEXE DE LA DECISION DE LA COMMISSION 2001/36/CE
MODIFIEE EN DERNIER LIEU PAR LA TELECOPIE N° SANCO/530934 DU 23/05/2003
MODIFICATION OF ANNEX TO COMMISSION DECISION 2001/36/EC AS LAST AMENDED
BY TELEFAX N° SANCO/ 530934 DU 23/05/2003
New consolidated list for **JAMAICA**

1. VSDJ/B&D-004 B&D Trawling Limited KINGSTON PP
2. VSDJ/C&J-0012 C&J Seafood Limited CRAWFORD DISTRICT ST. ELIZABETH PP
3. VSDJ/DYC-007 DYC Fishing Ltd KINGSTON PP
4. VSDJ/GCG-020 G.C. Gorton (North Coast Fisheries Limited) MONTEGO BAY ST. JAMES ZV
5. VSDJ/JAL-003 Jamaica Aquaculture Limited BARTON ISLES ST. ELIZABETH PP
6. VSDJ/LK-040 Lady Kim (Stanley Mohammed) LIONEL TOWN CLARENDON
7. ZV VSDJ/LS-0180 Lone Star (B&D Trawling Limited) KINGSTON ZV
8. VSDJ/NFM-005 Newport Fish & Meats Limited NEWPORT EAST KINGSTON 15 PP
9. VSDJ/RAJ-050 Rajmilour (Wadwald Owen Kinght) TOWER ISLE ST. MARY ZV
10. VSDJ/RR-0200 Rough Rider (B&D Trawling Limited) KINGSTON ZV
11. VSDJ/TRE-009 Ton-Rick Enterprise Limited YALLAHS ST. THOMAS PP
12. VSDJ/WJ-070 Windjammer (Ton-Rick Enterprise Limited) YALLAHS ST. THOMAS ZV

Categorie Legend:
PP Processing plant
ZV Freezer vessel
PP Etablissement
ZV Bateau congélateur
In force since / En vigueur à partir du : 22/01/2004

The "***DÉCISION DE LA COMMISSION du 22 décembre 2000 fixant les conditions particulières 'importation pour les gastéropodes marins originaires de la Jamaïque*** *[notifiée sous le numéro C(2000) 4080]* ***(Texte présentant de l'intérêt pour l'EEE)*** *(2001/37/CE)*" states the latitude and longitude where live bivalve mollusks are allowed to harvest in Pedro Bank.

Annex 19

Companies authorised to export Fish and fishery products to the EU (Continued)

ANNEXE/ANNEX
Bruxelles, le 10 juin 2004
E3 D(04)531605 RM/agm
PAYS / COUNTRY : SURINAME / SURINAME
PRODUIT / PRODUCT : PRODUITS DE LA PÊCHE / FISHERY PRODUCTS
MODIFICATION DE L'ANNEXE DE LA DECISION DE LA COMMISSION 2002/857/CE
MODIFICATION OF ANNEX TO COMMISSION DECISION 2002/857/EC
Nouvelle liste consolidée pour **SURINAME** / New consolidated list for **SURINAME**

1. SUR/597/001 Sail Ltd. PARAMARIBO PP
2. SUR/597/002 Sujafi Co. Ltd. PARAMARIBO PP
3. SUR/597/004 Seafood Industries Suriname N.V. PARAMARIBO PP
4. SUR/597/003 Guiana Seafoods NV COMMEWIJNE PP
5. SUR/597/101 Omicron Seafood N.V. PARAMARIBO PP
6. SUR/597/102 Caribbean Seafoods N.V. DUISBURG PARAMARIBO PP
7. SUR/597/104 Suvveb N.V. BETHESDA PARAMARIBO PP
8. SUR/597/105 N.V. Doroe PARAMARIBO PP
9. SUR/597/107 Bera Fisheries N.V. PARAMARIBO PP
10. SUR/597/108 Parhum N.V. LIVORNO PARAMARIBO PP
11. SUR/597/110 Suriname Sea Catch N.V. PARAMARIBO PP
12. SUR/597/112 Holsu N.V. DOMBURG DISTRICT WANICA PP
13. SUR/597/114 N.V. Unity LIVORNO PARAMARIBO PP
14. SUR/597/115 Deep Sea Atlantic N.V. DISTRICT WANICA PP
15. SUR/597/116 Bisoen Ocean Seafood N.V. PARAMARIBO PP
16. SUR/597/117 Bera Fisheries N.V. DIJKVELD PARAMARIBO PP
17. SUR/597/118 Guysur Fisheries N.V. WANICA PP

Categorie Legend:
PP Processing plant
PP Etablissement
In force since / En vigueur à partir du : 23/06/2004

Annex 20

CARICOM Exports to the USA

USA		Imports from CARICOM	
		Average 1999-01	
		Value Thousand of US $	Volume Kilograms
030110	Ornamental Fish	803.3	0.0
030211	TROUT (SALMO TRUTTA, ONCORHYNCHUS MYKISS, ONCORHYNCHUS CLARKI, ONCORHYNCHUS AGUABONITA, Etcc.	5.7	2333.7
030231	Albacore Or Longfinned Tunas (Thunnus Alalunga)	32.3	5121.0
030232	Yellowfin Tunas (Thunnus Albacares)	18268.0	3283473.0
030239	Other	12513.0	2170246.3
030264	Mackerel (Scomber Scombrus, Scomber Australasicus, Scomber Japonicus)	44.0	21954.3
030265	Dogfish And Other Sharks	3.7	537.3
030269	Other	11829.7	2894960.0
030270	Livers And Roes	1.0	340.0
030321	TROUT (SALMO TRUTTA, ONCORHYNCHUS MYKISS, ONCORHYNCHUS CLARKI, ONCORHYNCHUS AGUABONITA Etc	170.7	85123.3
030329	Other	2.7	1741.7
030332	Plaice (Pleuronectes Platessa)	1.7	306.7
030341	Albacore Or Longfinned Tunas (Thunnus Alalunga)	7091.3	2696161.3
030342	Yellowfin Tunas (Thunnus Albacares)	84.7	18308.3
030343	Skipjack Or Strip-Bellied Bonito	1.0	2488.7
030349	Other	68.0	20321.3
030371	Sardines (Sardina Pilchardus, Sardinops Spp.), Sardinella (Sardinella Spp.), Brisling Or Sprats (Sprattus Sprattus)	1.0	517.0
030374	Mackerel (Scomber Scombrus, Scomber Australasicus, Scomber Japonicus)	20.7	10445.0
030375	Dogfish And Other Sharks	241.3	18448.3
030378	Hake (Merluccius Spp., Urophycis Spp.)	19.7	11076.0
030379	Other 030379	2376.7	1096826.3
030380	Livers And Roes 030380	8.0	3376.3
030310	Fresh Or Chilled 030410	1574.7	255518.3
030420	Frozen Fillets	2278.3	719176.0
030490	Other	118.0	56640.3
030530	Fish Fillets, Dried, Salted Or In Brine, But Not Smoked	2.7	902.0
030559	Other	48.7	3486.3
030569	Other	1.7	50.0
030611	Rock Lobster And Other Sea Crawfish (Palinurus Spp., Panulirus Spp., Jasus Spp.)	63427.3	2323609.3
030612	Lobsters (Homarus Spp.)	479.3	18585.3
030613	Shrimps And Prawns	72628.7	13215437.0
030614	Crabs	821.0	49926.7
030619	Other, Including Flours, Meals And Pellets Of Crustaceans, Fit For Human Consumption	261.7	19769.0
030621	Rock Lobster And Other Sea Crawfish (Palinurus Spp., Panulirus Spp., Jasus Spp.)	617.7	21558.3
030622	Lobsters (Homarus Spp.)	403.0	14308.0
030623	Shrimps And Prawns	51.0	11447.7
030624	Crabs	28.0	1620.3
030629	Other, Including Flours, Meals And Pellets Of Crustaceans, Fit For Human Consumption	52.0	3981.7
030729	Other	3.0	349.3
030749	Other	43.7	55504.0
030791	Live, Fresh Or Chilled	2133.3	411403.0
030799	Other	2491.3	310951.0
	Total	**201053.0**	**29838329.7**

Annex 21
CARICOM Exports to the Canada

Canada		Imports from CARICOM Average 1999-01	
		Value Values in Thousand of US $	**Volume Volume in Kilograms**
030110	Ornamental Fish	66.3	0.0
030199	Other	1.0	59.7
030211	Trout (Salmo Trutta, Oncorhynchus Mykiss, Oncorhynchus Clarki, Oncorhynchus Aguabonita, Oncorhynchus Gilae, Oncorhynchus Apache And Oncorhynchus Chrysogaster)	0.0	1.7
030219	Other	74.7	17149.7
030229	Other	33.0	16689.7
030231	Albacore Or Longfinned Tunas (Thunnus Alalunga)	165.7	72609.0
030232	Yellowfin Tunas (Thunnus Albacares)	9.7	5049.7
030239	Other	830.7	391779.3
030250	Cod (Gadus Morhua, Gadus Ogac, Gadus Macrocephalus), Excluding Livers And Roes	9.3	3518.0
030265	Dogfish And Other Sharks	44.3	27032.3
030269	Other	1686.0	428161.0
030310	PACIFIC SALMON (ONCORHYNCHUS NERKA, ONCORHYNCHUS GORBUSCHA,Etc , EXCLUDING LIVERS AND ROES	10.7	2147.7
030329	Other	0.7	339.0
030331	HALIBUT (REINHARDTIUS HIPPOGLOSSOIDES, Etcc)	36.0	7724.0
030339	Other	0.7	168.3
030341	Albacore Or Longfinned Tunas (Thunnus Alalunga)	0.3	59.7
030342	Yellowfin Tunas (Thunnus Albacares)	37.7	16914.0
030349	Other	7.0	3147.0
030375	Dogfish And Other Sharks	0.7	158.7
030379	Other	1294.0	547270.3
030380	Livers And Roes	1.3	457.3
030410	Fresh Or Chilled	210.3	34010.0
030420	Frozen Fillets	259.0	132459.7
030490	Other	57.7	23428.3
030559	Other	57.0	1879.7
030569	Other	42.0	11257.7
030611	Rock Lobster And Other Sea Crawfish (Palinurus Spp., Panulirus Spp., Jasus Spp.)	5705.3	226339.3
030613	Shrimps And Prawns	819.7	119117.0
030614	Crabs	7.3	1628.3
030619	Other, Including Flours, Meals And Pellets Of Crustaceans, Fit For Human Consumption	88.3	3813.0
030621	Rock Lobster And Other Sea Crawfish (Palinurus Spp., Panulirus Spp., Jasus Spp.)	128.7	23376.7
030622	Lobsters (Homarus Spp.)	32.7	3987.0
030623	Shrimps And Prawns	17.3	2528.0
030624	Crabs	6.0	3193.7
030741	Live, Fresh Or Chilled	7.3	2316.0
030749	Other	0.0	8.3
030759	Other	17.3	4480.0
030791	Live, Fresh Or Chilled	0.0	16.7
030799	Other	41.0	10405.0
	Total	**11,806.7**	**2,144,680.3**