



Availability of Fresh Fish in Belize

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TURNEFFE ATOLL TRUST



Introduction:

Belize's commercial fishing industry provides essential jobs as well as food security for Belize. In recent months, fishermen, conservation organizations and others have voiced concerns about the health and sustainability of this fishery with fishermen voicing concerns that fish stocks have declined significantly.

Over the past fourteen years, there has been a 45% increase in the number of licensed commercial fishermen in Belize with the Belize Fisheries Department indicating there were 2,513 licensed fishermen in 2018. Growing evidence also points to significant pressure on Belize's fishery from illegal gillnet fishing by Guatemalan and Honduran fishermen(Reporter, 2019).

One measure of a fisheries health is its ability to supply the local market. In the past, Belize was an exporter of fresh snapper and grouper; however, the country now relies on imported fish and farmed fish to meet its needs. This analysis by Turneffe Atoll Trust sheds light on the current availability of local fresh fish in Belize.

Fifty (50) restaurants, resorts and supermarkets were randomly selected countrywide. The overall objective was to determine availability of fresh local fish. Additionally, the types of fish being purchased, where they were accessed, and reasons for these decisions were queried.

The survey was conducted during Belize's closed season for lobster and conch to avoid issues with fishermen being too busy to fish for finfish. It was also done at the tail end of the tourism season to avoid peak demand for fresh local fish.

Methodology:

Fifty (50) restaurants, resorts and supermarkets throughout Belize were randomly selected for this survey. Each participating business was contacted by telephone, the purpose of the survey was explained and a person with pertinent information was identified. Once participation was

confirmed and confidentiality was assured, the surveyor obtained answers to several standardized questions. Each survey lasted between 7 – 10 minutes.

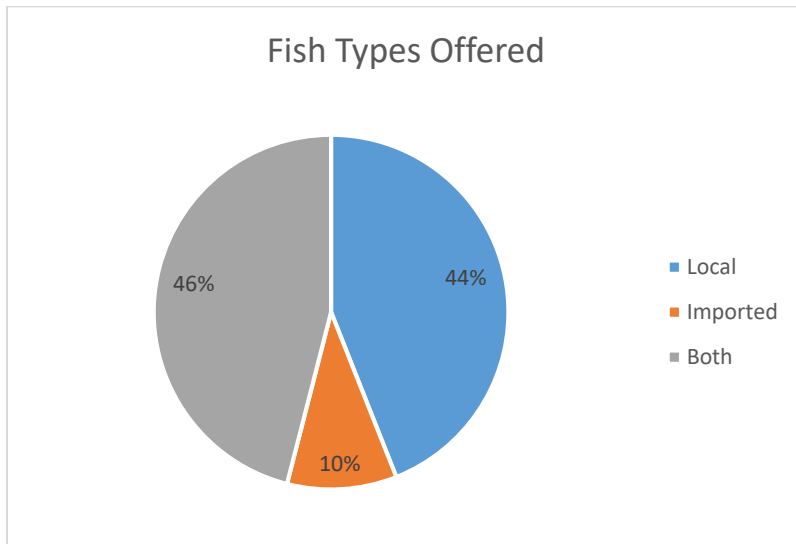
Results:

I. What types of fish do you offer?

Approximately 44% of the participants surveyed said they offer only local fresh fish including snapper, grouper, snook, hogfish, kingfish, barracuda and jacks. Participants indicated they would prefer to serve snapper and grouper; however, due to limited availability, they often serve other fish.

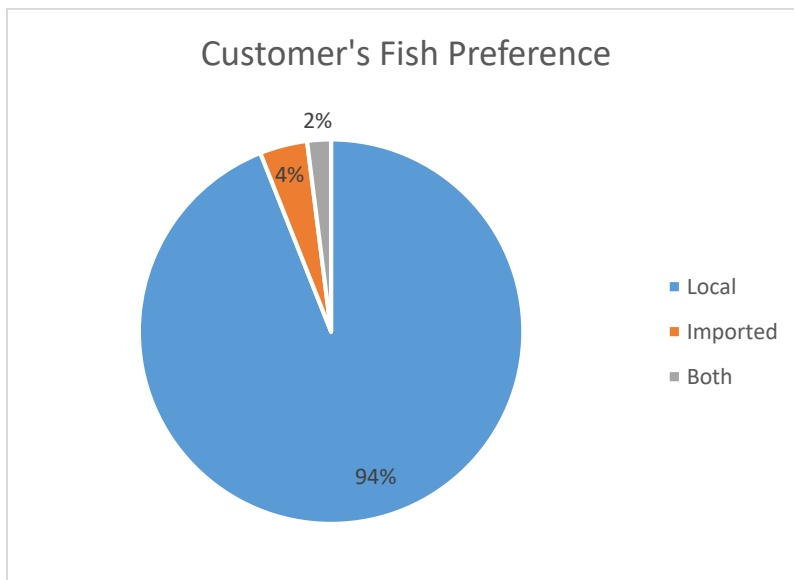
46% of participants said they offer both local and imported fish for their customers. These participants suggested several reasons for offering both including a shortage of local fish, better availability of imported fish and a lower cost for imported fish.

10% of participants offer only imported fish primarily because of better availability and lower cost. Several have discontinued selling local fish due to increasing prices.



II. Do your customers prefer local or imported fish?

94% of participants indicated their customers prefer local fish, 4% said their customers prefer imported fish, and 2% said their customers enjoyed both. Preference was based upon a variety of reasons (see Question III below).

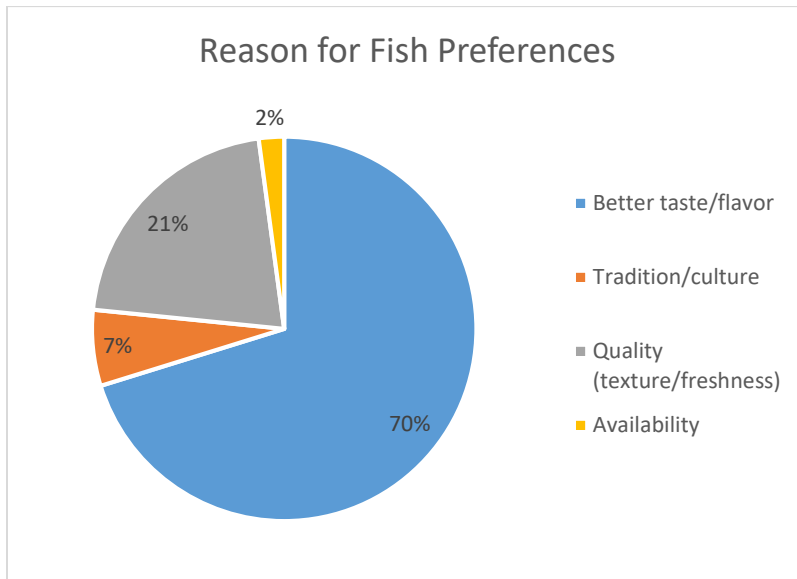


III. Why do your customers prefer local, imported or farmed fish?

70% of participants surveyed said their customers preferred local fish because it tastes better. Several went on to say that snapper and grouper are much preferred and that they provide the richest and best flavor.

21% of participants said customers preferred the texture and freshness of the local fish. Several noted that local fish tended to be firmer or more compact while noting that imported fish was often softer and sometimes mushy.

7% said their customers preferred local fish due to “tradition and culture”. For Belizeans, fish is an integral part of their diet, particularly during the Lenten season. Tourists consider fresh-caught local fish as an important part of their vacation experience in Belize. 2% of participants said their customers preferred local fish due to the perception that it is readily available.



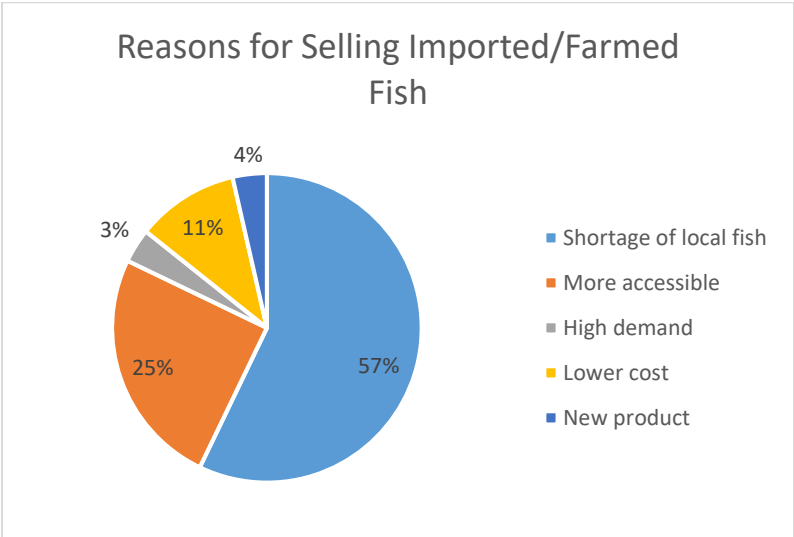
IV. What are your reasons for providing imported fish or farmed fish?

57% of those participants offering imported fish or farmed fish indicate they do so because they cannot find an adequate supply of local fish. In some cases, participants have entirely substituted imported fish for fresh local catch. Due to the higher demand, limited supply, or a combination of both, prices for fresh local fish have gone up significantly. Several small restaurants and resorts indicated they are sometimes unable to pay the higher prices and they also noted that when local fish supplies are limited, fishermen go to the high-end resorts where they can receive a higher price for their product.

25% of participants offering imported fish or farmed fish indicated they offer imported fish to their customers because it is more accessible. Several participants indicated they are able to source imported fish more easily than local fish and that the supply of imported fish is more reliable.

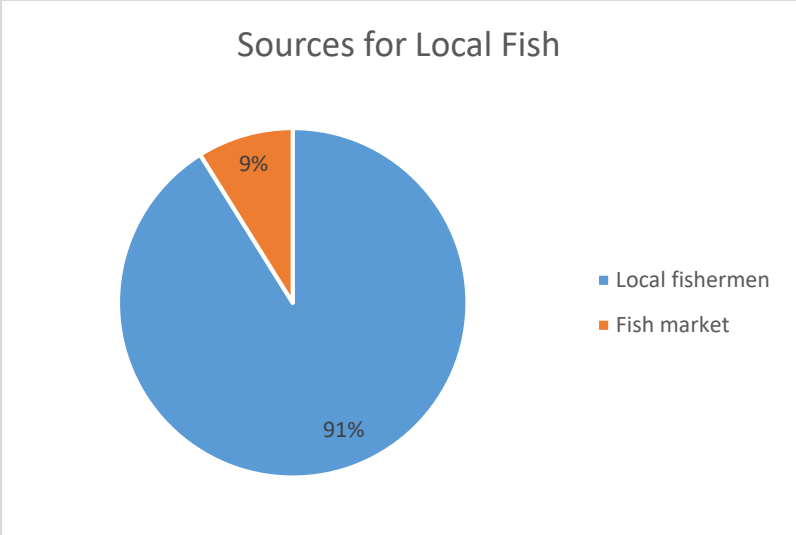
11% of the participants offering their customers imported or farmed fish say they offer imported fish because it costs less than fresh local fish and the prices are more stable. 3% of participants

offering imported fish or farmed fish indicated they offer imported fish to their customers due to demand, and a couple of participants said that their customers ask for imported fish. One restaurateur indicated that imported fish (sea bass) has made its way into the menu and is selling well. Another 4% of the participants offering their customers imported or farmed fish indicated they are doing so to try a new product.



V. Where do you purchase your local fish?

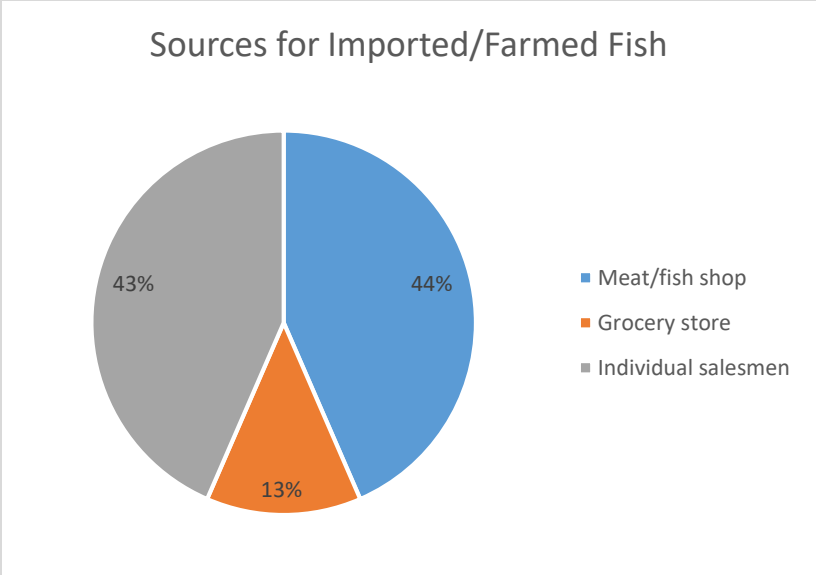
91% of participants who purchase local fish source their fish from local fishermen. Most restaurants and resorts indicate they have at least one or two reliable sources. During high season, however, several indicate they occasionally need to seek other sources to find fresh fish. 9% purchase local fish from fish markets.



VI. Where do you purchase your imported fish or farmed fish?

44% of those participants who purchase imported fish purchase from meat/fish shops, 43% do so from individual salesmen and 13% from grocery stores.

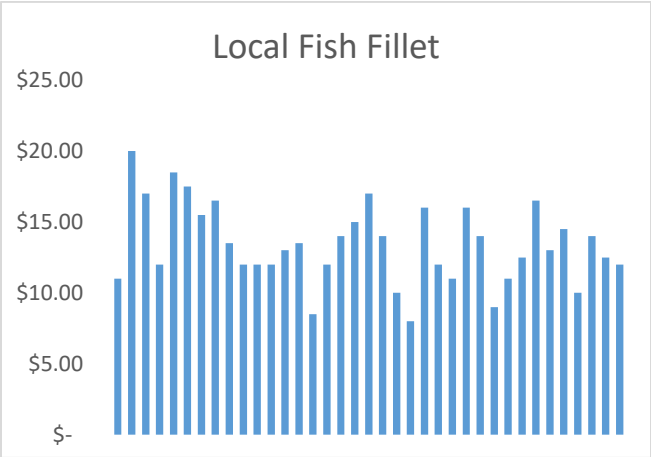
Although it was difficult to obtain detailed information about imported fish types and their origin from fish vendors, Belize Customs did document that slightly more than 40,000 pounds of Swai and Basa were imported into Belize in 2017, and that this increased to 50,000 pounds in 2018. Swai or Basa is a type of catfish farmed primarily in Southeast Asia.

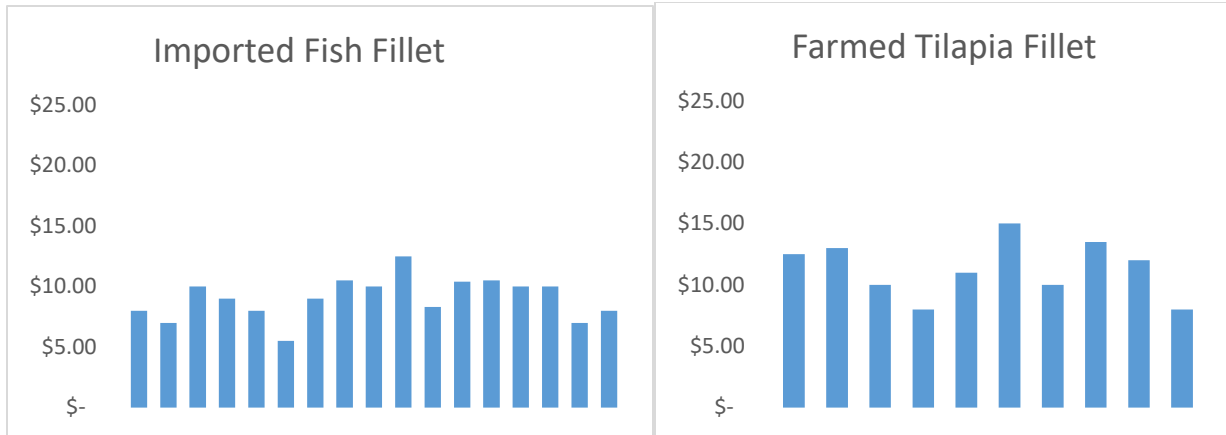


VII. How much do you pay for local versus imported fish?

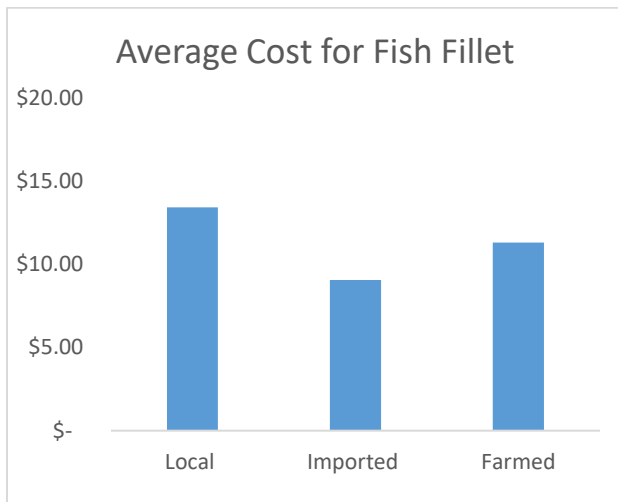
Depending upon seasonality and fish availability, the price for local fish fillet ranges from \$8 to \$20 per pound with an average price of approximately \$13 per pound. Prices for imported fish fillet range between \$5 - \$12 and farmed tilapia prices range from \$8 - \$15. The average price for imported fish was approximately \$8.50 per pound and farmed tilapia averages approximately \$10 per pound.

Price Ranges for Local, Imported and Farmed Fish Fillet





Average Cost for Fish Fillet



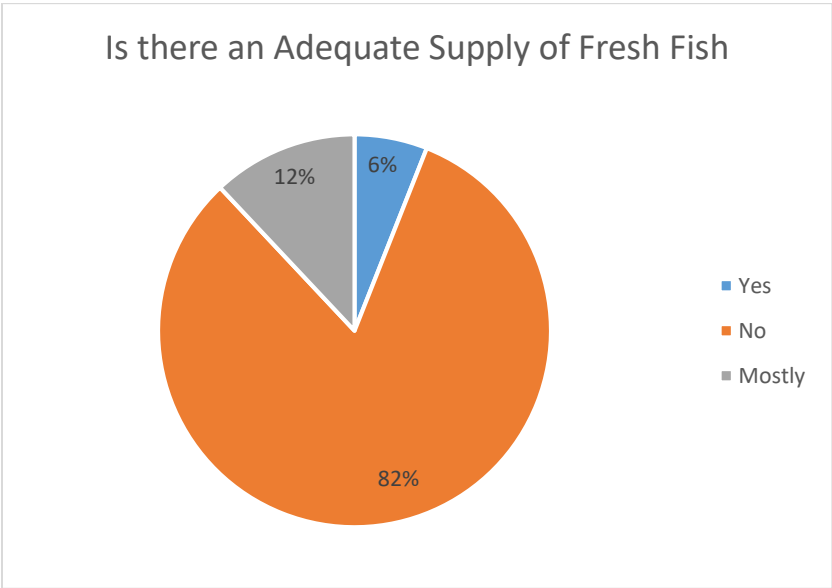
VIII. Are you able to find a reliable supply of local fish?

Our survey identified a strong preference for fresh local fish; however, 82% of the participants indicated they are unable to find a reliable supply of fresh local fish. Participants further indicate that finding top-quality local fish such as snapper and grouper is more of a challenge. Several noted they frequently need to offer less desirable local fish such as hogfish, kingfish, barracuda, and occasionally lionfish.

Participants noted particular difficulties during high season when the demand for local fish is at its peak. Some participants indicated they keep a reserve of local fish to avoid running out, while others substitute farmed tilapia or imported fish when necessary. Those offering only snapper or

grouper indicated they have been forced to remove fish completely from their menus at times because they refuse to purchase imported fish due to lower quality and poor taste. In other cases, participants shifted completely to imported fish.

6% of participants indicated they are able to find a reliable supply of local fish and 12% said they are able to find a reliable supply most of the time.



Conclusions:

Restaurants, resorts and supermarkets in Belize clearly prefer local fresh to imported or farmed fish. However, 82% of participants surveyed indicate they cannot find an adequate supply of local fresh fish. Further, the majority of businesses selling imported fish do so because they cannot access fresh local fish.

With increased tourism and more restaurants in Belize, the demand for fresh fish has clearly increased. At the same time, most fishermen point to a declining fishery and the supply of fresh

fish appears to have diminished. Belize, once an exporter of finfish, can no longer meet its own demand for fresh fish and must now import fish or utilize farmed fish to meet demand.

Although this analysis did not evaluate the viability of the fishery in Belize, fishermen consistently indicate that fish stocks have seriously declined. Licensed fishermen in Belize have increased by 45% over the past 14 years and now number more than 2,500. Overfishing, the use of gillnets, environmental pressures and excessive, unsustainable development must be considered, and it is imperative that the large-scale illegal fishing by Guatemalan and Honduran fishermen utilizing large gillnets be addressed (Reporter 2019).

In summary, our analysis indicates there is no longer an adequate supply of fresh local fish in Belize. This may very well indicate ominous consequences for our commercial fishers, Belize's tourism industry and the economic future of Belize.

References:

(2019, April 7th) Guatemala's Fishing Trade Spells Trouble for Belize. *Reporter*, 20-21.

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