



COMMISSION OF SMALL SCALE, ARTISANAL FISHERIES AND AQUACULTURE OF LATIN AMERICA AND THE CARIBBEAN

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OVERVIEW OF MARINE FISHERIES IN LATIN AMERICA AND THE CARIBBEAN

Introduction

This document provides a synthesis of the current situation of marine fisheries in Latin America and the Caribbean (LAC), as part of the background information for the sector analysis in the framework of the Seventeenth Session of COPESAALC. The FAO State of World Fisheries and Aquaculture 2020¹ (SOFIA), other recent FAO publications and the FishstatJ database were used as main sources of information for the elaboration of this document.²

Marine Fisheries in LAC in the biennium 2018-2019

By 2019, global marine fisheries production was estimated at 81.5 million tons. In LAC this value reached 11.8 million tons, contributing 14.4 percent to the global marine catch. Regional production decreased by 2.36 million tons compared to the previous year, although it maintains a production close to the average production of the last four years (12.4 million) (Table 1).

Marine capture volumes accounted for 95.9 percent of the total catch and 74.5 percent of the consolidated regional fishery and aquaculture production in 2019. Since 1974, marine captures showed an upward trend until 1994, with a peak exceeding 22.4 million tons (Figure 1). Thereafter, the trend is declining, with fluctuations. The lowest production level was reached in 2016 with 10 million tons. The lowest production volume was recorded in 1983 with a total of 8.9 million tons (Figure 1).

¹FAO.2020. The State of World Fisheries and Aquaculture 2020. Sustainability in action. Rome <https://doi.org/10.4060/ca9229es> <http://www.fao.org/fishery/sofia/es>

²FAO. 2021. Fishery and Aquaculture Statistics. Global production by production source 1950-2019 (FishstatJ). In: FAO Fisheries Division [online]. Rome. Updated 2021. www.fao.org/fishery/statistics/software/fishstatj/en

Table 1: Marine fisheries production in LAC (million tons) and contribution to world production (%)^{3 4}

Marine Fisheries	1974	1980	1990	2000	2010	2015	2018	2019
Global	49.8	53.9	79	85.9	77.3	81.5	84.4	81.5
LAC	7.2	9.3	15.7	19.6	11.9	11.3	14.1	11.8
LAC Contribution (%)	14.4	17.1	19.7	22.4	15.3	13.7	16.7	14.4

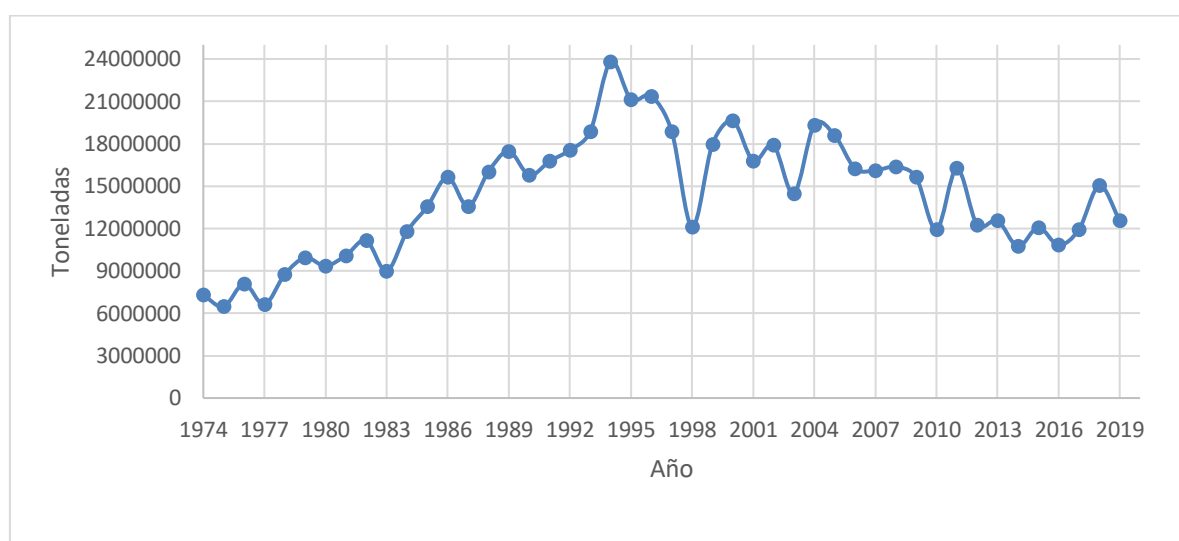


Figure 1. Historical trend of the marine catch volume in LAC from 1974 to 2019 (FAO-FISHSTAT, 2021)

Total global marine captures increased slightly from 82.3 million tons in 2017 to 84.4 million tons in 2018. This increase is mainly related to the anchovy (*Engraulis ringens*) fishery from Peru (6.2 million tons) and Chile (0.85 million tons) following relatively low catches in recent years. In 2019, this fishery recorded a new decrease in its overall production, mainly influenced by the significant reduction in the catch from Peru, which, after the extraordinary increase in 2018, recorded production values in 2019 similar to the average of the last 4 years. For the same year, Panama recorded an increase in the production of this species, reaching a total volume of 115 thousand tons.

With regard to other marine fisheries in the region, in 2019 there was an increase in the production of red shrimp (*Pleoticus muelleri*) in Argentina, reaching 215 000 tons, and an increase in the volume of giant squid (*Dosidiscus gigas*) in Peru with 527 000 tons. For the biennium 2018-2019, there was an increase in the volume of jack mackerel (*Trachurus murphyi*) in Chile and Peru, as compared to the average catch of the previous four years. In contrast, Ecuador recorded a catch reduction of this species with respect to the average of the last four years.

In 2019, Peru contributed 40.9 percent of the total marine fishery production in LAC, followed by Chile with 20.1 percent, Mexico with 12 percent and Argentina with 6.8 percent. The member countries of

³FAO.2020 The State of World Fisheries and Aquaculture 2020. Sustainability in action. Rome <https://doi.org/10.4060/ca9229es> <http://www.fao.org/fishery/sofia/es>

⁴FAO. 2021. Fishery and Aquaculture Statistics. Global production by production source 1950-2019 (FishstatJ). In: FAO Fisheries Division [online]. Rome. Updated 2021. www.fao.org/fishery/statistics/software/fishstatj/en

the Commission as a whole contributed 94.4 percent of the total volume of marine catch in the region (Table 2).

Table 2. Marine captures of COPPESAALC member countries. Share of marine fisheries to national and regional⁵ catch and growth rate for the periods 2015 to 2019 and 2018 to 2019 (FAO-Fishstat, 2021)

Pais	2015	2018	2019	Contribución de la pesca marina en las capturas totales (%) por país para el 2019	Contribución por país al total de las capturas marinas de LAC para el 2019	Tasa crecimiento entre 2015-2019	Tasa crecimiento entre 2018-2019
Perú	4 806 362	7 189 172	4 832 529	99.61	40.95	0.54	-48.77
Chile	2 131 953	2 370 411	2 376 682	100.00	20.14	10.30	0.26
México	1 322 872	1 475 665	1 425 413	90.15	12.08	7.19	-3.53
Argentina	795 415	815 187	800 611	96.92	6.78	0.65	-1.82
Ecuador	643 175	597 343	607 900	99.98	5.15	-5.80	1.74
Brasil	465 573	489 382	485 423	68.34	4.11	4.09	-0.82
Venezuela, Rep Boliv de	207 082	255 266	253 172	92.01	2.15	18.21	-0.83
Panamá	143 408	175 419	231 434	99.95	1.96	38.04	24.20
Colombia	63 441	47 625	78 913	77.82	0.67	19.61	39.65
Uruguay	56 106	62 954	62 605	92.06	0.53	10.38	-0.56
Nicaragua	40 896	54 180	51 577	99.32	0.44	20.71	-5.05
El Salvador	49 984	52 964	49 018	98.49	0.42	-1.97	-8.05
Suriname	43 799	44 103	36 601	97.73	0.31	-19.67	-20.50
Cuba	23 765	20 671	16 735	90.29	0.14	-42.01	-23.52
Guatemala	33 277	14 649	14 373	85.90	0.12	-131.52	-1.92
Costa Rica	14 676	13 565	13 565	99.63	0.11	-8.19	0.00
República Dominicana	10 557	12 019	12 750	90.30	0.11	17.20	5.73
Jamaica	15 977	14 133	12 329	91.50	0.10	-29.59	-14.63
Honduras	11 009	10 500	11 312	94.96	0.10	2.68	7.18
Bolivia	0	0	0	0.00	0.00	0.00	0.00
Paraguay	0	0	0	0.00	0.00	0.00	0.00
Resto de países de LAC	421 071	455 628	429 526	99.23	3.64	1.97	-6.08
Total LAC	11 302 415	14 170 836	11 802 468	95.85	100	4.24	-16.71

Of the COPPESAALC member countries, nine showed a decrease in their marine fishery production in the reported period and the rest showed a slight increase (Table 2). These differences, in addition to the changes stemming from national fishing dynamics, could also be ascribable to the improvement in the systems for collecting information and monitoring national fishing statistics.

In terms of target species, the region maintains a wide diversity of exploited fishery resources. The main species by catch volume in the Atlantic Ocean and adjacent seas are presented in Table 3. Pelagic and demersal species account for the largest catch volumes. Other species of high commercial value, such as octopus, crabs and spider crabs, lobsters, abalones, snails and sea cucumbers, account for

⁵ FAO. 2021. Fishery and Aquaculture Statistics. Global production by production source 1950-2019 (FishstatJ). In: FAO Fisheries Division [online]. Rome. Updated 2021. www.fao.org/fishery/statistics/software/fishstatj/en

smaller volumes, even though their market values are significantly higher, generating significant income for the families of artisanal fishers engaged in these activities and revitalizing local economies.

Table 3. Main species caught in the Atlantic Ocean and adjacent seas (FISHSTAT, 2021)

Species	Catch volume 2018	Catch volume 2019
Sea bass, hake, haddock	431 634	463 465
Prawn, shrimp	441 958	399 093
Various coastal fish	388 419	386 699
Various pelagic fish	306 165	256 277
Herring, sardine, anchovy	248 661	245 105
Tuna, bonito	229 195	209 997
Squid, cuttlefish (pota), octopus	227 402	208 623
Unidentified marine fish	145 042	147 108
Shark, skate, rabbitfish	65 642	59 650
Flounder, halibut, sole	49 276	54 614
Various demersal fish	47 229	46 514
Oyster, scallop	50 658	46 130
Crab, king crab	43 099	37 271
Clam, cockle, ark clams	35 383	34 282
Abalones nei, winkles, conch	36 310	30 034
European lobster, lobster	26 994	25 402
Scallop	28 130	23 141
Sea-urchin and other echinoderm	12 332	11 577
Mussel	4 875	4 972
King crab, galatheaidea	2 713	2 346
Various aquatic invertebrates	8 629	1 369
Other species	13 611	5 902
Total	2 843 357	2 549 571

In the Pacific Ocean, minor pelagic fisheries, led by anchovy, sardines and herring, continue to be the biggest fisheries in the region, accounting for 69 percent of the marine catch in 2018 and 57 percent of the catch for 2019. In contrast with the Atlantic fisheries, in the Pacific the volume of target species is higher but less diverse (Table 4).

Table 4. Main species caught in the Pacific Ocean (FISHSTAT, 2021)

Species	Catch volume 2018	Catch volume 2019
Herring, sardine, anchovy	8 043 763	5 360 446
Various pelagic fish	918 282	1 029 219
Tuna, bonito	834 112	876 679
Squid, cuttlefish (pota), octopus	547 830	626 493
Brown seaweeds	188 427	328 614
Various coastal fish	183 421	173 001
Prawn, shrimp	145 235	136 379
Sea bass, hake, haddock	156 189	134 013
Unidentified marine fish	105 044	129 414
Red seaweeds	103 462	119 518
Shark, skate, rabbitfish	81 321	65 579
Scallop	20 628	56 699
Clam, cockle, ark clams	47 110	44 783
Various marine molluscs	80	41 848
Sea-urchin and other echinoderm	35 826	41 291
Various aquatic invertebrates	29 471	35 966
Crab, king crab	48 778	34 898
Various demersal fish	44 698	30 640
King crab, galatheaidea	22 882	21 356
Abalones nei, winkles, conch	15 881	15 496
Mussel	14 877	13 678
Other species	29 062	28 273
Total	11 616 379	9344283

In general, marine fisheries continue their long-term downward trend, albeit a slight recovery between 2016 and 2018. Catch volumes are likely to stabilize at around 15 million tons if national monitoring, control and surveillance systems are effective and fisheries management measures are progressively tightened. Any increase should reflect the opening of new fisheries, particularly deep-sea fisheries, and the untrammelled implementation of science-based management measures.



Conclusions

- Despite a rebound in marine catch in 2018, the volume recorded in 2019 shows a new contraction that maintains the downward trend since 1994. However, the increase in exploratory fishing by various countries in the region, stricter management measures and the need for fishing communities to adapt to the effects of climate change, will undoubtedly be decisive for the opening of new fisheries that could reverse the observed trend.
- A pending task in the region is undoubtedly the strengthening of systems for the collection, analysis and intelligent use of biological and fisheries information for the sustainable management of the sector. It is urgent that national governments strengthen their institutional capacities, engaging resource users in the process through co-monitoring and co-management schemes.
- It is essential to strengthen fisheries management measures, especially in fisheries that show signs of overexploitation or are fully exploited. Likewise, it is necessary to take actions towards the sustainability of emerging fisheries for which no historical information is available considering a precautionary approach.
- Monitoring, control and surveillance systems are a challenge, particularly in geographically isolated regions. The use of new remote monitoring technologies and co-management efforts are key tools to achieve sustainability.
- Although several countries in the region have the scientific and technological capacity to expand their exploratory fishing efforts, limited financial resources for these purposes hinder these important efforts; moreover, most of the countries of the Commission have neither human nor financial resources to do research, which makes them dependent on South-South cooperation and, in general, international assistance. It is therefore highly desirable to maintain the dynamics of cooperation between countries, facilitating the opening of new fisheries and fishing grounds, as part of responsible practices and in keeping with other ecosystem users.
- Artisanal marine fisheries are significantly more vulnerable to the effects of overexploitation, climate change and other impacts such as the CoVid19 pandemic, so it is essential to promote the formulation of fisheries management plans that establish biological reference points (BRPs), promote responsible fishing practices and guarantee equitable access to resources.
- Strengthening the sustainability of fisheries depends on a broad participation of artisanal fishers in management decisions, in a context of scientific information, equity and co-responsibility in dialogue with non-artisanal stakeholders and with the stewardship of the State.