



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 status of aquaculture in Latin America and the Caribbean (LAC), as part of the background information for the sectoral analysis in the framework of the XVIII Session of COPPESAALC. The main source of information used in the preparation of this document was The State of World Fisheries and Aquaculture 2022¹ (SOFIA), other recent FAO publications and the FishstatJ database.²

Marine fisheries in LAC in the 2019-2020 biennium

In 2020, the world marine fisheries production was estimated at 79.9 million tonnes. In LAC, this value reached 12.3 million tonnes, contributing 15.3 percent of global marine fishing. Regional production increased by 460 thousand tonnes compared to the previous year, although it maintains a production level close to the average production of the last five years (11.9 million) (Table 1).

Marine catch volumes accounted for 96.1 percent of the total catch. Since 1974, marine catches showed an upward trend until 1994, with a peak exceeding 23.8 million tonnes (Figure 1). Thereafter, the trend has declined, with fluctuations. The lowest production point was recorded in 2016, being the lowest figure since 1983 (Figure 1).

¹ FAO. 2022. The State of World Fisheries and Aquaculture 2022. Towards blue transformation. Rome, FAO <https://doi.org/10.4060/cc0461es>

² FAO. 2023. Fishery and Aquaculture Statistics. Global production by production source 1950-2020 (FishstatJ). In: FAO Fisheries Division [online]. Rome. Updated 2023. www.fao.org/fishery/statistics/software/fishstatj/en

Table 1: Marine fisheries production in LAC (million tonnes) and contribution to global production (%)^{1,2}

Marine fisheries	1974	1980	1990	2000	2010	2015	2019	2020
Global	58.5	63.1	79.6	86.2	77.4	81.5	81.2	79.9
LAC	7.2	9.3	15.7	19.6	11.9	11.3	11.8	12.3
LAC Contribution (%)	12.6	14.8	19.7	22.8	15.4	13.8	14.5	15.3

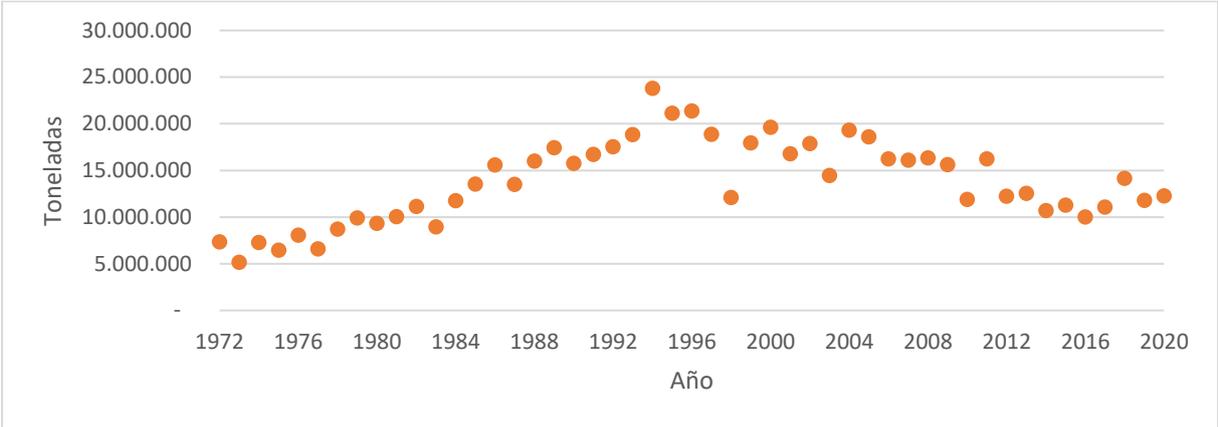


Figure 1. Historical trend of marine catches volume in LAC from 1974 to 2020 (FAO-FISHSTAT, 2023)

The global marine catches were slightly reduced by 1.6 percent from an estimated 81.2 million tonnes in 2019 to 79.9 million tonnes in 2020. This reduction may be related to the effects of the COVID-19 pandemic that came to a standstill in several countries during the first stage of the contingency.

Marine catches in LAC increased from 11.8 million tonnes in 2019 to 12.3 million tonnes in 2020, representing a 3.9 percent increase. This increase was primarily related to anchovy catches (*Engraulis ringens*) from Peru (4.4 million tonnes), even though total marine catches from other fishing countries declined, such as Chile (-8.3%) and Mexico (-4.4%).

Regarding other marine fisheries in the region, for the 2019-2020 biennium, there is an increase in the jack mackerel (*Trachurus murphyi*) catch in Chile and Peru, compared to the last four-year average.

In 2020, Peru contributed 46 percent of the total LAC marine fisheries production, followed by Chile with 18 percent, Mexico with 11 percent and Argentina with 7 percent. Together, COPPESAALC member countries contributed 96.9 percent of the total marine catch volume in the region (Table 2).

¹ FAO. 2023. Fishery and Aquaculture Statistics. Global production by production source 1950-2020 (FishstatJ). In: FAO Fisheries Division [online]. Rome. Updated 2023. www.fao.org/fishery/statistics/software/fishstatj/en

² FAO. 2023. Fishery and Aquaculture Statistics. Global production by production source 1950-2020 (FishstatJ). In: FAO Fisheries Division [online]. Rome. Updated 2023. www.fao.org/fishery/statistics/software/fishstatj/en

Table 2. Marine catches of COPPESAALC member countries; marine fishery share of national and regional catches and growth rate for the periods 2015 to 2019 and 2019 to 2020. (FAO-FishstatJ, 2023).

Country	2015	2019	2020	Contribution of marine fishery to total catches by country (%) for 2019	Country contribution to total LAC marine catches by country for 2020	Growth rate period 2015-2019	Growth rate period 2019-2020
Peru	4806361	4832529	5658917	99.7%	46.1%	17.7%	17.1%
Chile	2131558	2380300	2182768	100.0%	17.8%	2.4%	-8.3%
Mexico	1328147	1425413	1363341	90.2%	11.1%	2.6%	-4.4%
Argentina	795415	800611	818157	97.7%	6.7%	2.9%	2.2%
Ecuador	632466	607602	635042	100.0%	5.2%	0.4%	4.5%
Brazil	485374	485425	484481	68.3%	4.0%	-0.2%	-0.2%
Boliv Repo f Venezuela	206965	252941	236424	93.7%	1.9%	14.2%	-6.5%
Panama	143407	231542	187428	99.9%	1.5%	30.7%	-19.1%
Colombia	83764	79099	56557	73.2%	0.5%	-32.5%	-28.5%
Uruguay	56106	60652	54885	87.3%	0.4%	-2.2%	-9.5%
El Salvador	54234	49706	52314	98.7%	0.4%	-3.5%	5.2%
Nicaragua	40916	50876	49268	99.1%	0.4%	20.4%	-3.2%
Suriname	38673	30538	28922	97.1%	0.2%	-25.2%	-5.3%
Cuba	23764	16747	18464	91.5%	0.2%	-22.3%	10.2%
Costa Rica	14700	17719	17345	99.7%	0.1%	100.0%	-2.1%
Honduras	10659	11312	15219	96.2%	0.1%	42.8%	34.5%
Jamaica	16327	12329	11963	92.9%	0.1%	-26.7%	-3.0%
Dominican Republic	10659	14369	9013	91.2%	0.1%	-15.4%	-37.3%
Guatemala	12794	13354	8916	79.1%	0.1%	-30.3%	-33.2%
Paraguay	0	0	0	0.0%	0.0%	0.0%	0.0%
Plurinational State of Bolivia	0	0	0	0.0%	0.0%	0.0%	0.0%
Rest of LAC countries	393055	431993	375398	98.3%	3.1%	0.0%	-13.1%
Total LAC	11285344	11805057	12264821	3.87	100	8.7%	3.9%

Nine of the COPPESAALC member countries show a decline in the marine fishery production during the reporting period, while the rest shows a slight increase (Table 2). In addition to changes in national fishing dynamics, the differences could also be explained by improvements in the data collection and monitoring systems for national fishery statistics.

In terms of target species, the region supports 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 show the highest catch volumes. Other species of high commercial value, such as octopus, crabs and spider crabs, lobsters, abalones, snails and sea

cucumbers, show lower volumes, even though their market value is significantly higher, generating important incomes for the families of artisanal fishers involved in these activities and invigorating local economies.

Table 3. Main species caught in the Atlantic Ocean and adjacent seas (FISHSTAT, 2023)

Species	Catching volume 2019	Catching volume 2020
Sea bass, hake, haddock	395213.83	346455.14
Prawns, shrimps	299009.4	264022.28
Various coastal fish	391703.84	379639.8
Various pelagic fish	225475.01	206528.1
Herring, sardine, anchovy	240280.36	227423.19
Tuna, bonito	203540.17	190357.75
Squid, cuttlefish (pota), octopus	208580.2	270577.95
Unidentified marine fish	143769.05	143042.05
Shark, skate, rabbitfish	59079.81	55695.38
Flounder, halibuts, sole	7107	5223.46
Various demersal fish	35146.07	35638.47
Oyster, scallops	46133.01	44042.78
Crab, spider crab	34620.42	32673.32
Clam, cockle, ark clams	34231.93	29376.53
Abalones nei, winkles, conch	32373.34	29928.38
European lobster, lobster	33430.08	28642.04
Scallops	22451	33355.33
Sea urchin and other echinoderms	30303.49	41143.59
Mussels,	5009	5047.55
King crab, Galatheaidea	7355	7300.9
Various aquatic invertebrates	985	1210
Other species	2456.95	2383.13
Total	2458253.96	2379707.12

In the Pacific Ocean, minor pelagic fisheries, headed by anchovy, sardines and herring, continue to be the largest volume fisheries in the region, accounting for 57 percent marine catches in 2019 and 60 percent catches by 2020. Unlike the Atlantic fisheries, the volume of target species in the Pacific is higher but diversity is lower (Table No. 4).

Table 4. Main species caught in the Pacific Ocean (FISHSTAT, 2023)

Species	Catching volume 2019	Catching volume 2020
Herring, sardine, anchovy	5360571.8	5897291.72
Various pelagic fish	1030581.99	1271313.73
Tuna, bonito	886794.29	831999.79
Squid, cuttlefish (pota), octopus	626489.43	573734.85
Brown seaweeds	328614.01	362063.68

Various coastal fish	173150.49	153376.19
Prawns, shrimps	136352.08	115710.86
Sea bass, hake, haddock	134013.42	112546.68
Unidentified marine fish	129154.06	119571.92
Red seaweeds	119518.41	105861.97
Shark, skate, rabbitfish	62227.29	62384
Scallop	56699.17	50416.31
Clam, cockle, ark clams	44784.68	36675.59
Various marine molluscs	41847.96	3145.51
Sea urchin and other echinoderms	41289.55	41278.35
Various aquatic invertebrates	35966	33475.42
Crabs, spider crab	34910.93	32426.4
Various demersal fish	30640.05	28148.29
King crabs, galatheaidea	21442.3	17602.78
Abalones nei, winkles, conch	15495.52	13886.9
Mussels,	13677.85	12334.17
Other species	28238.75	25544.37
Total	9352460.03	9900789.48

In general, the long-term downward trend in marine fisheries persists, although there is a slight recovery between 2017 and 2020. Catch volumes are likely to stabilise at around 15 million tonnes if national monitoring, control and surveillance systems are effective and fisheries management measures are strictly enforced. 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 recovery in marine catches in 2019 and a further increase in the volume recorded in 2020 in the LAC region, the overall downward trend has continued since 1994. However, the increase in exploratory fishing in several countries in the region, stringent management measures and the need of fishing communities to adapt to the effects of climate change will undoubtedly be decisive for establishing new fisheries that could revert the observed trend.
- There is no doubt that a pending task in the region is to strengthen the collection systems, the analysis and intelligent use of biological-fishery information for a sustainable management of the sector. It is essential that national governments invest in strengthening their institutional capacities, to involve resource beneficiaries in the process, through co-monitoring and co-management schemes.
- It is essential to strengthen fisheries management measures, especially in fisheries that show overexploitation or are fully operational. Likewise, it is necessary to take actions to ensure the sustainability of emerging fisheries that have no historical data, with a precautionary approach.

- Monitoring, control and surveillance systems can be challenging, particularly in geographically isolated regions. The use of new remote sensing technologies and co-management efforts are key elements for sustainability.
- Although several countries in the region have scientific and technical capacities to expand the exploratory fishing, the lack of financial resources limits these efforts; moreover, most countries of the Commission do not have the human and financial resources to do research, which makes them dependent on South-South cooperation and, in general, on international assistance. It is therefore highly desirable to maintain the dynamics of cooperation between countries, facilitating the opening of new fisheries and fishing grounds, within the framework of responsible practices, in harmony with other users of the ecosystems.
- Artisanal marine fisheries are significantly more vulnerable to the effects of overexploitation, climate change and other external impacts such as the COVID19 pandemic, so it is essential to promote the design of fishery management plans establishing biological reference points, promoting responsible fishing practices, ensuring equitable access to resources, and the inclusion of artisanal fishers in national social protection systems.
- The sustainability of fisheries depends on the broad participation and co-responsibility of resource beneficiaries, in a context of equitable dialogue between the different levels, State stewardship based on equitable access and the best scientific information available to guarantee that the biological capacity of the resources is not exceeded and a strict system of compliance with management measures. This requires a robust monitoring, control and surveillance system, promoting co-management and a multi-sectoral dialogue providing economic-productive alternatives to users when restrictive measures are enforced.