

ST HELENA FISHERIES SECTOR PROFILE

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1. GENERAL DATA

Land area	122 km ²
Ocean area	446,61
Population (2015 Q1) – Estimated	4,749
Gross National Product (2009/10) million	£19.36
Fishing contribution to GDP (2009/10)	unknown
GNP per capita (2009/10)	£4,840

2. COMMODITY VALUE

Value of fish at landing (2014)	£143,436.04
Value of fish imports (2013/14)	$\pm 169,265.00^{1}$
Value of fish exports (2014/15)	£146,297.99
Value of local fish sales (2014)	£175,491.68

3. EMPLOYMENT IN THE FISHERIES SECTOR (2014)

(i)	Primary sector – full time	16
	Primary sector – part time	7
	Primary sector – occasional	6
(ii)	Secondary sector	32
(iii)	Subsistence fisheries	Exist – but no data

4. HISTORICAL BACKGROUND

4.1. Historical records

4.1.1. Records of small-scale subsistence fishing activity at St Helena go back to the 16th century, with some of the earliest accounts being made by visitors to the island in their reports and diaries. There are also references to fishing from the period when the island was administered by the East India Company from 1659-1834. A summary of these, together with a review of attempts to develop the sector since 1589, is given in Edwards (1990).

5. STRUCTURE AND CHARACTERISTICS OF THE FISHERY

5.1. Oceanographic conditions and productive potential

5.1.1. St Helena is an isolated island, some 122km² (47 sq miles) in area, lying in the South Atlantic Ocean approximately midway between the coasts of Angola to the east and Brazil to the west. The nearest land to St Helena is Ascension Island, 700 nm (1290km) to the northwest. James Bay, St Helena's principal anchorage, lies off the capital Jamestown, at 15° 55′S; 05° 43′W. St Helena has a 200 nautical mile (370 km) Exclusive Economic Zone (EEZ) measured from coastal baselines in accordance with international law, giving an area of approximately 446,500km². (The combined areas of the EEZs of St Helena, Ascension and Tristan da Cunha amount to approximately 1,640,000km², compared with that of the UK, which is approximately 750,000km².)

¹ Fish imports are Wharf Value and categorised as Processed Fish (e.g. fish fingers, fish burgers, breaded fish etc.), Tinned Fish and Pet Food (Source: SHG Statistics Office)

- 5.1.2. The island emerged, as a volcano, several hundred kilometres to the east of the Mid-Atlantic Ridge, about 15 million years ago. It is now surrounded by a shallow shelf that drops to 200m in depth within about 2km of the shore on the leeward (northwest) side of the island, but extends to about 6km off the south- western point, after which it descends sharply to abyssal depths of more than 4000m. The total area of seabed thus available to demersal (ie bottom dependent) species is therefore only about 156 km².
- 5.1.3. Three named seamounts lie within St Helena's EEZ. The nearest to Jamestown is Bonaparte seamount, approximately 75nm to the west, which rises to within about 105m of the sea surface. Approximately 180nm to the north of Jamestown lies Cardno seamount, which rises to within about 77m below the sea surface. Both of these seamounts are flat-topped guyots or tablemounts. The deeper Akademik Kurchatov seamount lies to the northwest of Bonaparte Seamount approximately 160nm from Jamestown, rising to within about 410m of the sea surface. Bonaparte seamount has in recent years been successfully fished from St Helena, albeit intermittently, for tuna and tuna-like species. There is some evidence that Cardno seamount, which is close to the boundary of the EEZ, may be exploited by unlicensed vessels, probably on an opportunistic basis.
- 5.1.4. St Helena lies in the centre of the South Atlantic gyre, an anti-clockwise circulation of waters that moves up the west coast of Africa as the Benguela and Angolan currents, turning westwards roughly at the latitude of Ascension Island as the South Equatorial Current, then southwards down the coast of Brazil as the Brazil Current, then eastwards across the southern Atlantic, past Tristan da Cunha and towards South Africa as the West Wind Drift. These currents are relatively nutrient-rich, being nourished by such factors as oceanic upwellings (for example off southwest Africa) and the outflow of nutrient-laden waters from major river systems on the African and South American coasts.
- 5.1.5. Primary production (eg of microscopic phytoplankton) is an indicator of secondary production (eg of zooplankton and fish). The productive potential, in fisheries terms, of waters in the circulating current is higher than that in the centre of the gyre in which St Helena's EEZ is situated. The island itself and the seamounts noted above can, however, create suitable conditions in which deeper, colder, nutrient-rich and therefore more productive water, reaches the surface layers of the ocean thus attracting, aggregating and temporarily retaining passing migratory fish. Analysis of satellite imagery of chlorophyll concentrations (as an indicator of primary productivity) demonstrates that Tristan da Cunha has the greatest fisheries potential, followed by Ascension, and then by St Helena, whose EEZ is also influenced by large-scale dynamic oceanic processes that can vary from year to year thus affecting the nature, seasonality and extent of available migratory fish resources.

5.2. Fishing community, vessels, gear and methods

- 5.2.1. Over the period 2009-2014, the number of full-time fishermen has varied from 16 to 26, with a declining trend, operating from 9 to 12 boats, (see Annex B). Most boats operate usually with two-man crews, although a few fishermen fish single-handedly either because of the difficulty in recruiting to the industry or because of the low income gained from the fishery which make it unprofitable to engage more persons.
- 5.2.2. The size (number) of the local fishing fleet has declined over the period 2009-2014. The current fleet consists of 9 operational boats, both catamarans and monohulls, approximately 8-10m in length, powered by diesel engines and containing live-bait

tanks and space for storing fish on ice. Of these, 5 vessels currently operate on a full-time basis. Most of the fleet is at least 20 years old, with some boats dating back to the 1960s. The last major fleet renewal was in 1990-92 when five Gifford-designed modified Sandskipper catamarans were introduced under a development aid project on a part-loan/part-grant basis.

- 5.2.3. The full-time fleet operates on a daily basis, mostly within about 12 nautical miles of the coast, but venturing further afield particularly when pursuing schools of albacore tuna. Between 1985 and 2007, four larger vessels (three local and one foreign operating under licence) have attempted to exploit the offshore seamount fisheries. Although these offshore ventures have shown reasonable potential, none of them has been sustained, either because of mechanical breakdown and/or failure of the vessels to meet required seaworthiness and safety standards.
- 5.2.4 In April 2014, the 22 metre Motor Fishing Vessel, Extractor, funded under a joint investment initiative between the St Helena Fisheries Corporation and Enterprise Saint Helena and operated through a locally registered (special purpose vehicle)Company, Saint Marine Resources Limited, arrived to the island with the purpose of exploiting the fishery resource within the wider 200 mile EEZ. The vessel undertook a total of 12 voyages between June and October 2014 achieving total landings of 60 Mt after which operations were curtailed due to a contractual dispute between crew members and Company.
- 5.2.5. Tuna are caught either by conventional pole-and-line gear (or its rod-and-reel variant, which has more in common with sports fishing gear) or by heavy duty hand-lines. Micro-spool longline and green stick equipment was trialled towards the latter part of 2013 and throughout 2014 and it is intended that this will continue in the latter part of 2015. Live bait is a necessary component of successful pole-and-line fishing, the three main bait-fish species being kingston (*Decapterus macarellus*), summer stonebrass (*D. punctatus*), and mackerel (*Somber japonicus*) all of which are available during the main tuna season from April to July. Bait-fish are usually caught close inshore along the northwest coast of the island between Flagstaff Bay and Lemon Valley.
- 5.2.6. Recreational/sport fishing opportunities are available from commercial fishermen and others, but there are currently no purpose-built sport fishing boats based at St Helena.

5.3. Fish resources

- 5.3.1. The principal target species are members of the tuna family (Scombridae): yellowfin (Thunnus albacares); albacore, also called longfin (Thunnus alalunga); bigeye (Thunnus obesus); and skipjack (Katsuwonus pelamis). Other significant components of the commercial landings include wahoo (Acanthocybium solandri); grouper, also called jack or rock hind (Epinephelus adscensionis), mackerel (Scomber japonicus) and swordfish (Xiphias gladius). A variety of other species of crustaceans and bony and cartilaginous fish, including some species attractive to sports fishers, for example billfishes (Istiophoridae), is regularly landed in smaller quantities (see Annex A).
- 5.3.2. As can be seen in Annex A (Fishery Production by Weight (tonnes) 2005-2014), total landings over the past ten years have averaged approximately 429t/yr, with a peak of 898.71t in 2011 and then a low of 117t in 2013. The difference is a consequence of sometimes considerable annual fluctuations in availability, particularly of skipjack and yellowfin tuna, due to changes in their migration patterns which are influenced by prevailing oceanographic conditions from year to year. Over the period 2005-

2014, skipjack averaged 37% of the total tuna catch and yellowfin 41%, with albacore and bigeye averaging 11% and 10% respectively. But in a 'good' yellowfin year such as 2006 this species accounted for 67% of the tuna catch, with the lower value skipjack accounting for only 16%. Catches of high-value wahoo have remained relatively steady over the past ten years, averaging about 18.5t/yr with an unusual peak to 29t and 31t in 2009 and 2011 respectively.

5.3.3. In 2011, there was a phenomenal catch of yellowfin, albacore, bigeye and skipjack tuna; the highest total amount to be caught in the ten year period (see Fig 1 below). For the first time we saw a record catch of 189.89t of bigeye tuna being landed in any one year.



- 5.3.4. Tunas and tuna-like species are caught throughout the year. Landing records for yellowfin and bigeye do not show any regular annual seasonal pattern of peak abundance. Albacore, however, tend to be caught between the months of July and September when the annual 'runs' take place, possibly in association with westerly offshoots of the Benguela/Angolan currents that have been observed by satellite at that time of year. Skipjack landings tend to be at their maximum between March and May, but there have also been the occasional landings towards the latter part of the year.
- 5.3.5. The highly migratory fish stocks found within St Helena's EEZ do not form discrete populations amenable to local management, as they are part of larger populations for which scientific stock assessments can only viably be undertaken on the basis of data generated across much of the Atlantic Ocean. These assessments are therefore made by the International Commission for the Conservation of Atlantic Tunas (ICCAT) on behalf of its contracting and co- operating parties for example the UK and its Overseas Territories, including St Helena and are based on catch and effort returns from fishing fleets and on biological data provided by these parties. The extent to which St Helena can benefit from the quotas based on these assessments and allocated by ICCAT to the UK's Overseas Territories depends on how these quotas are shared among the territories.
- 5.3.6. Of the stocks of primary interest to St Helena, ICCAT resource assessments have determined that neither the west nor east Atlantic **skipjack** populations are likely to be overexploited and that they could therefore sustain increased fishing up to their calculated maximum sustainable yield for the Atlantic. No quotas have therefore been set for this species and there are thus opportunities for St Helena to increase

its catch substantially.

- 5.3.7. ICCAT consider that Atlantic **yellowfin** stocks may potentially be overfished, but no individual catch quotas are currently applied. However, in view of the pressure on this stock, ICCAT have recommended (Rec 93-04): '*That there be no increase in the level of effective fishing effort exerted on Atlantic yellowfin tuna, over the level observed in 1992*'. This recommendation, with its reference to effort rather than catch levels, is somewhat ambiguous and appears not to take adequate account of the needs and special circumstances of small island developing states, such as St Helena, however the precautionary approach as set by local authority is 400t/yr.
- 5.3.8. The UK Overseas Territories have been allocated a quota of 100t/yr from the South Atlantic stock of **albacore**, which allows St Helena little scope for expansion given that in 2011 it exceeded it's quota by some 20 tonnes.
- 5.3.9. **Bigeye** stocks have been determined by ICCAT to be fully exploited, but the UK Overseas Territories have managed to maintain a quota of this species of up to 2,100t/yr, thus offering considerable scope for St Helena to increase its catch from the current levels.
- 5.3.10. The inshore grouper (Epinephelus adscensionis) stock is of local importance and is locally managed. A total allowable catch of 36t/yr has been imposed since 1988. Concerns raised by the Fishermen's Association over the sustainability of this stock – not least because of the alleged existence of an informal fishery for this species, with catches and local sales being unreported – led to the commissioning by the St Helena Government of a scientific study, in 2006, into its ecology and population status (Choat and Robertson, 2009). The following recommendations were made: (a) the total allowable catch limit of 36t/yr should not be exceeded; (b) a minimum size limit of 35cm total length or 1kg in individual weight be imposed so as to allow females at least one seasonal spawning opportunity; (c) a series of nofishing reserves be established; and (d) further investigations of the nature and extent of spawning aggregations be made; and (e) a management plan for the grouper stock be developed and implemented. There is no seasonal pattern to the exploitation of the grouper stock, which tends to be fished mainly during times of scarcity of tunas and tuna-like species. Grouper catches have been well below the Total Allowable Catch (TAC) since 2008.

5.4. Inland fisheries and aquaculture

5.4.1. As far as is known, no attempts have been made to culture fish for commercial purposes at St Helena, although *Tilapia sp.* (reportedly *T. mossambica*) was introduced some years ago into agricultural irrigation reservoirs (for the purpose of controlling algal growth) where it survives.

5.5. Utilisation of the catch

5.5.1. All fish caught by the commercial fleet are required to be landed to the St Helena Fisheries Corporation (SHFC) at its jetty at Rupert's Bay. Fish are generally gutted, gilled and iced at sea. They are offloaded from fishing vessels in insulated fish boxes and transported by truck directly to a primary fish processing plant nearby where they are weighed as received, then washed, cleaned/headed etc and either blast frozen (to -30°C) immediately, or held in a 6-8t capacity chiller overnight, depending on the quantity received and time of landing. The plant has two blast freezers of 12-15t capacity depending on fish size and shape; and two cold stores each of approximately 250t capacity, again depending on fish size and shape, held at minus 25 to minus 30°C.

5.5.2. Landed prices (as at December 2014) paid to fishermen for those species destined for export were as follows:

Grouper (Jack)	£0.72/kg (round)
Skipjack (Bonito)	£0.20/kg (round)
Swordfish	£0.89/kg (gutted & gilled)
Yellowfin tuna (>10kg)	£0.82/kg (gutted & gilled)
Yellowfin tuna (<10kg)	£0.43/kg (gutted & gilled
Bigeye tuna (>10kg)	£0.79/kg (gutted & gilled)
Bigeye tuna (<10kg)	£0.43/kg (gutted & gilled)
Albacore tuna	£0.66/kg (gutted & gilled)
Wahoo	£0.98/kg (gutted & gilled)

- 5.5.3. Products for export include frozen loins of yellowfin, albacore and bigeye tuna, frozen loins of marlin and sailfish, whole frozen and gilled and gutted skipjack tuna and frozen headed and gutted wahoo. Products are packed either in 20kg cartons or woven plastic sacks each holding approximately 30kg of fish, before being placed in refrigerated containers for shipment overseas via sea freight. Vacuum packs of tuna loins, cuts of flesh etc are also produced for the domestic market, Argos having taken over from SHFC as its supplier in 2004.
- 5.5.4. Records indicate that local (regulated) sales of fish and fish products on the local market increased from 46.52 metric tonnes in 2005 to 59.20 metric tonnes in 2009, after which they have remained relatively stable, with local sales averaging 60 tonnes/year. Responsibility for local sales has been outsourced by the St Helena Fisheries Corporation to a local contractor, KGT Fish Retailers Ltd, which sells fish supplied by the primary fish processing facility at the Jamestown market and by means of a van service to rural communities. Retail prices are regulated by the Corporation. See also para 7.5.3.
- 5.5.5. There is evidence of some informal (ie unregulated and unreported) sale of fish by 'occasional' fishermen or their agents for example from the back of private vehicles thus circumventing price controls and regulations relating to conservation and public health.

5.6. State of the industry

- 5.6.1. St Helena's fishing industry is small by international standards, with landings having averaged approximately 429t/yr over the past 10 years. It operates in the central Atlantic Ocean in waters of relatively low productivity. It has limited access to fish, limited capacity to catch and process fish, and limited means by which fish and fish products can be shipped to markets. It therefore focuses on environmentally sustainable methods of fishing and the production of high quality products attractive to both local and export markets with accreditation for entry to the European Community under the relevant directives. Fishermen in St Helena are in the fortunate position of having a ready market for all that they can catch (subject to quotas and other stock management restrictions) in the form of a private sector fish processing and storage plant of a capacity that exceeds the catching power of the existing fleet. The plant was designed to handle at least 600-650 t/yr, but is capable of handling much higher volumes; this throughput has very rarely been achieved due to the limited capacity of the local fleet.
- 5.6.2. There has been a declining trend in recent years in the number of full-time commercial fishermen, and there have been very few, if any, new entrants to the fishery. The inshore fleet (ie those boats fishing on a daily basis within approximately 12 nautical miles of the island) consists of boats that are mostly more

than 20 years old (although they have to meet the appropriate local seaworthiness and safety standards before they can be licensed) and generally have neither the speed nor capacity to take full advantage of available resources, for example during the seasonal runs of albacore tuna. There are currently (Dec.2014) two local boats capable of fishing the offshore seamounts, which are known from previous surveys and limited periods of commercial fishing, to have some potential (as yet not quantified) for increasing production of high value tuna species. Another is currently being modified for offshore fishing.

5.7. Economic role of the fishing industry

5.7.1. In addition to providing employment for 16 full-time, 7 part-time and 6 occasional fishermen in 2014, the sector also provided employment for 20 persons at the fish processing facility; 6 at the St Helena Fisheries Corporation; 4 at KGT Retailers and 2 at Richards' secondary fish products. The total of 61 represents approximately 1.2% of the current population.

6. **DEVELOPMENT PROSPECTS**

- 6.1.1. The Government of St Helena currently (Dec 2014) includes the fisheries sector among its high-level policy priorities for the stimulation of economic growth through private sector development. It also recognises that the fish resource base on which such growth depends, and the marine environment in which it exists, must be protected and properly managed.
- 6.1.2. Prospects for the medium- and longer-term development of St Helena's fisheries sector will be determined by its ability to build and maintain a critical mass of full-time commercial fishermen, and to attract sufficient investment in vessels and processing facilities to enable full advantage to be taken of available fish resources, once the production potential of these has been established with a greater degree of confidence.
- 6.1.3. Commercial fishing operations that have taken place at the seamounts in recent years (see 5.3.3. above) have indicated that an opportunity exists for some expansion of the catch from those waters. Although the productive potential and seasonal availability of resources has not yet been assessed systematically, landings from two vessels that fished the seamounts intermittently between 2003 and 2007 averaged 6.6 tonnes/vessel for each month fished, with a range of 4.3-9.7 tonnes/month. This suggests that there is scope for modest expansion into the seamount fishery upon which the two vessels as mentioned in 5.6.2. above, are seeking to improve their catch.
- 6.1.4. Any significant expansion of the fishery, whether at the seamounts or closer to the island of St Helena, may however be constrained by quotas allocated by ICCAT to the relevant UK Overseas Territories. As noted above, the only tuna species with significant potential for expansion are **skipjack** and **bigeye**. The small quota for **albacore** (100 t/yr) was exceeded in 2011 by the existing inshore fleet, and could presumably be achieved again especially with the increase in local offshore fishing capability.
- 6.1.5. There is no specific quota for **yellowfin**, but ICCAT have recommended (Rec 93-04) that with effect from 31 May 1994, fishing effort levels should not exceed those of 1992. There is some lack of clarity as to how this recommendation

should be interpreted and applied given St Helena's circumstances as a small island developing state with an artisanal fishery, but there may be modest scope for expansion subject to negotiation with ICCAT and other contracting parties.

- 6.1.6. As there is no quota for **skipjack**, catches could be increased; but as this is a relatively low value species, whose freight costs are the same as for higher value species, it is not a particularly attractive export product. It is also close to its southern limit at St Helena and is sensitive to the depth of the thermocline², both of these factors affecting its distribution and catchability. It has, however, been the main species used for canning in St Helena for many years. Although the privately-owned cannery ceased operating in 2012, there remains a ready local market for canned product as evidenced by the presence on local supermarket shelves of imported canned tuna. Consumers have, however, indicated a preference for the local product (which could substitute for similar imported products) and disappointment that this convenient, low-cost, healthy food is no longer available.
- 6.1.7. The available quota for **bigeye** tuna is up to 2,100t/yr, which would allow St Helena to expand its fishery for this species significantly. But as bigeye tuna tend to swim below the thermocline, they are more usually caught by longlining, a non-traditional fishing method in St Helena that, despite trials, has not yet found favour with local fishermen. However, with the Extractor being a purposebuilt longliner which is already fitted with longlining facilities and the recent investment in micro-spool longlining equipment for trialling by the smaller vessels in 2015, it is hoped that bigeye tuna will become a much more targeted species using this method of fishing.
- 6.1.8. ICCAT have determined that the southern Atlantic **swordfish** stock is likely to be underexploited and have allocated a quota of 25t/yr to the UK Overseas Territories. In November 2013, the 11 meter fishing vessel Argonaut, owned and operated by Argos Atlantic Cold Stores Limited, undertook a period of longline fishing whereby 6.5/t of swordfish was taken during the first five months of operation. St Helena would, however, only be likely to be able to take advantage of this opportunity were small-scale longlining be adopted by the local fleet, in which case swordfish might be taken as incidental catch.
- 6.1.9. The development of an airport at St Helena (scheduled for completion in February, 2016) would have a number of implications for the fishing industry. If, as envisaged, air access were to facilitate the development of a low-volume/high-value local tourism industry, it could be expected to lead both to the expansion of the local market for fish and to the opening of new opportunities for the export of high-value fresh fish and value- added fish products. It could, however, also lead to the development of tourism-related sport fishing enterprises, which might attract experienced fishermen away from the commercial food fishery. Without an airport, the fishing industry would have little alternative but to continue as at present, provided that the local processing plant continued to offer a guaranteed market for all landings and to export product by sea.
- 6.1.10. Recently, there has been an increased number of international fishing vessel operators interested in obtaining licences to fish in St Helena's EEZ.

² The layer at which the upper, warmer, surface waters of the ocean, meets the lower, cooler water below, and which moves according to season between about 30m and 70m below the surface.

While access to St Helena's offshore seamounts on an opportunistic basis might be of marginal interest to some vessels, there is no evidence to suggest that the potential productivity of other areas of the EEZ would be generally attractive to foreign fleets. Exploratory pole and line fishing carried out recently in other areas of the EEZ under agreement by SHG with a foreign interest in 2013 and also with a local company during a limited period in 2014, yielded very low catches. Alternative fishing methods such as Green Stick and micro-spool long-lining will be trialled using local vessels in 2015 and 2016.

7. INSTITUTIONS

7.1. Central Government

- 7.1.1. The Government of St Helena comprises: the **Governor**; an **Executive Council** of five elected and three *ex officio* members (Chief Secretary, Financial Secretary and Attorney General); and a **Legislative Council** consisting of twelve elected and three *ex officio* members (as before), and a Speaker and Deputy Speaker. Executive authority at Ascension and Tristan da Cunha is exercised on behalf of the (shared) Governor by respective Administrators and Island Councils. A new Constitution came into effect in 2009.
- 7.1.2. The St Helena **public service** comprises a number of government Directorates, several of which have functions relating to the management and regulation of fisheries activities, both on- and offshore.
- 7.1.3. The **Fisheries Section**, co-located with the **Agriculture and Natural Resources Division**, has primary responsibility for advising the St Helena Government on fisheries policy and management matters. The Section is singly-manned by a Senior Fisheries Officer, who reports through the Head of Agriculture and Natural Resources to the Office of the Chief Secretary.
- 7.1.4. The **Attorney General's Chambers** has involvement with the fisheries sector, both in respect of fisheries legislation and its application. The Department also contains and provides expertise on matters such as international treaties extended to St Helena by Her Majesty's Government and on the drafting and negotiation of fisheries access licensing agreements.
- 7.1.5. In addition to its routine functions in respect of public health and food safety, the **Health Directorate** provides Competent Authority services (inspection and laboratory) in accordance with the requirements of the European Commission's Directive 91/493/EEC relating to food hygiene standards throughout the chain of custody of fish and fish products intended for export to the European Community. Domestic sales are subject to local environmental health regulations. The activities and functions of the Competent Authority are subject to inspection and accreditation by the Commission's Food and Veterinary Office.

7.2. Government Agencies

7.2.1. The **St Helena Fisheries Corporation** was established in 1979 under the St Helena Fisheries Corporation Ordinance, for the purposes, among other things, of: regulating of prices within the industry; facilitating commercial activities including the purchase, processing and/or storage of all fish caught, and the marketing of these both locally and overseas; and assisting the fishing community by making financial loans and providing practical support services

including the supply of chandlery, fuel, ice and bait. Its role has subsequently evolved in response to commercial developments on the island, notably the establishment of Argos Atlantic Cold Stores Ltd in 2000 and The Bank of St Helena in 2004. In addition to its roles as a price regulator and service provider to fishermen, the Corporation acts as an intermediary between the fishermen and Argos, and provides a cash flow buffer between the two.

As part of a review of institutional and operational arrangements currently in place to support the development of the local fishing industry, a functional review of the St Helena Fisheries Corporation was carried out in early 2014. The review focussed on the role, responsibilities and associated structure of the Fisheries Corporation, its current Ordinance, agreements with third party organisations and oversight in the context of the island seeking to develop a private sector led economy. A number of recommendations were tabled and accepted and an action plan developed.

7.2.2. Enterprise St Helena (ESH) was established in 2012 under the provisions of the Enterprise St Helena Development Ordinance, in order to promote and facilitate commercial development in St Helena. Whilst playing an enabling role, acting on behalf of all private sector interests who wish to develop commercial ventures in St Helena, the Organisation has a number of target sectors, including fisheries, which it seeks to develop. In the past the Organisation has facilitated expansion of the sector by financing fishing vessels and also the primary processing facility at Rupert's Valley. Following the establishment of the Bank of St Helena in 2004, the Organisation is no longer a primary source of finance for local businesses. It is, however, still able to provide financial assistance for projects that have sector-wide implications, such as developing industry standards in terms of both product quality and branding.

7.3. Coordinating and Consultative Committees

- 7.3.1. A national **Fisheries Working Group** was established in 2003 initially to consider the future role and functions of the St Helena Fisheries Corporation. It reported in 2005, making a number of recommendations that fed into the national development planning process and into further consideration, in 2007, of options for the future role and functions of the Corporation.
- 7.3.2. A **Tuna Fisheries Task Group** was established by the St Helena Development Agency in August 2009, specifically to develop and implement marketing strategies, branding, packaging, labelling and promotion of local tuna products. This work was initiated in anticipation of a favourable outcome to the Agency's application for Marine Stewardship Council certification of St Helena's four main tuna fisheries. Unfortunately, MSC accreditation was not achieved due to wider ICCAT management issues.
- 7.3.3. A **Fisheries Task Force** with a sector-wide remit was established in 2009 in order to 'stimulate and drive actions to resolve the challenges currently facing the sector and to realise the potential development opportunities that may be presented with or without the establishment of air access to St Helena'. Its immediate priorities were to undertake a situation analysis of the sector (to which this sector profile will contribute) and to prepare a medium term fisheries sector strategy.

7.4. Non-governmental organisations

- 7.4.1. The **St Helena National Trust** was established under the St Helena National Trust Ordinance 2001 which provides for the protection and conservation of St Helena's natural and built heritage, including marine life.
- 7.4.2. The **St Helena Fishermen's Association**, a member organisation of the National Trust, was formed in 1989 to look after fishermen's interests both commercially and socially (including welfare in times of hardship), and to be a forum for their interests and concerns, particularly in relation to the conservation of fish stocks.

7.5. Private sector

- 7.5.1. Argos Helena Ltd, trading as **Argos Atlantic Cold Stores Ltd** at St Helena, has operated a modern fish processing and storage facility at Rupert's Bay since 2000. It is operated in accordance with EU sanitary standards and is subject to inspection by St Helena's Competent Authority (see also section 5.5 and para 7.1.6). Although the facility was designed to handle a throughput of over 600-650 tonnes per annum, this has very rarely been achieved in the last 14 years of operation. In May 2015, Argos and SHG jointly announced the company's intention to withdraw from operating the processing facility, and the Task Force (noted at 7.3.3) has been assigned with exploring options for the continued operation of the plant.
- 7.5.2. The **St Helena Canning Company**, still in situ at Rupert's Bay, has not been operational since 2012.
- 7.5.3. The St Helena Fisheries Corporation has outsourced (by contract after open competition) its local retail operations to **KGT Fish Retailers** which sells fish at the Jamestown Market and by van in the country districts (at the same prices, which are fixed by the Corporation).

8. LEGISLATION

8.1. Fishing operations

- 8.1.1. **Fishery Limits Ordinance 1977** (as revised to 01 Jan 2001). Defines the fishery limits of St Helena and makes provision for the regulation of fishing within these limits, including, among other things, the licensing of fishing vessels (both local and foreign), and the powers of sea fishery officers.
- 8.1.2. **High Seas Fishing Ordinance 2001** (as revised to 01 Jan 2006). This ordinance makes provision for the implementation of an agreement adopted by an FAO conference in November 1993 to promote compliance with international conservation and management measures by fishing vessels on the high seas, and the agreements for the implementation of the provisions of the United Nations Convention on the Law of the Sea of 10 December 1982 relating to the conservation of straddling fish stocks and highly migratory fish stocks.
- 8.1.3. **Conservation and Management of Fishery Resources Ordinance 2003**. This ordinance provides for St Helena's participation in the activities of the Southeast Atlantic Fisheries Commission (SEAFO). See also paragraph 9.3.2 below.

8.2. Port and land-based operations

8.2.1. **Harbours Ordinance 1997** and Subsidiary Legislation (as revised to 01 Jan 2001). Makes provision for the regulation, management and control of harbours in St Helena, including both vessel and shore-side operations within designated areas.

8.2.2. Fish and Fish Products Ordinance 1998 and Subsidiary Legislation (as revised to

01 Jan 2001). Makes provision for the regulation of fish handling and processing whether for local consumption or for export, and for the licensing and inspection of premises used for these purposes. The Fish and Fish Products Regulations, 1999, incorporate into the laws of St. Helena the provisions of Directive No. 493 of 1991, made by the Council of the European Communities on 22nd July 1991, laying down the health conditions for the production and placing on the market of fish and fish products, intended for human consumption.

- 8.2.3. **St Helena Fisheries Corporation Ordinance 1979** (as revised to 01 Jan 2001). This Ordinance establishes the Corporation and prescribes its administrative structure, objectives and powers.
- 8.2.4. Customs (Export and Import Control) Regulations; Customs (Arriving and Departing Ships) Regulations; and Customs (Entry Forms) Regulations all have potential implications for the fishing industry.

8.3. Conservation

- 8.3.1. Endangered Species Protection Ordinance, 1996 (as revised to 01 Jan 2001). Makes provision for the protection of endangered, endemic and indigenous species of animals and plants, both terrestrial and marine.
- 8.3.2. **Birds Protection Ordinance, 1996** (as revised to 01 Jan 2001). Of potential relevance to fishing operations (for example long-lining) in which there is a risk of birds being incidentally killed or injured.
- 8.3.3. **Spear Guns Control Ordinance, 1994** and Subsidiary Legislation (as revised to 01 Jan 2001). Makes provision for the control of the use of spear guns during closed seasons and in prohibited areas, and their use in conjunction with SCUBA diving equipment.
- 8.3.4. **National Parks Ordinance, 2003.** Makes provision for the establishment of national parks, nature reserves, sanctuaries etc, including areas in any part of St Helena's territorial waters.

9. INTERNATIONAL

MATTERS

9.1. International treaties and obligations

9.1.1. A number of international conventions and associated agreements having direct implications for the fishing industry have been extended to St Helena by the UK. Among these are: the United Nations Convention on the Law of the Sea; the Agreement Relating to the Conservation and Management of Straddling Fish Stocks and Highly Migratory fish Stocks; the Convention of Biodiversity; and the Convention on International Trade in Endangered Species. St Helena also subscribes to the principles of the FAO's Code of Conduct for Responsible Fisheries.

9.2. Access licensing agreements

9.2.1. St Helena Government is currently in the process of developing a policy statement with respect to the development of the fisheries with the aim of providing direction and guidance on fisheries access and associated developments to local Government, local fisheries stakeholders and foreign

interests. It is expected that this process will provide for a transparent process to aid planning by prospective commercial fishing partners wishing to fish in St Helena waters.

9.3. Regional Fisheries Management Organisations

- 9.3.1. The International Commission for the Conservation of Atlantic Tunas (ICCAT) is an inter-governmental fishery organisation, established in 1966, responsible for the conservation of tunas and tuna-like species in the Atlantic Ocean and its adjacent seas. ICCAT compiles fishery statistics from its members and from all entities fishing for these species in the Atlantic Ocean; coordinates research, including stock assessment, on behalf of its members; develops science-based management advice; provides a mechanism for Contracting Parties (including UK from 1995 on behalf of its Overseas Territories) to agree on management measures; and produces publications. The St Helena Government sends a representative to relevant meetings. Of particular interest to St Helena is ICCAT's role in setting catch quotas and/or effort controls in respect of tropical tunas in the UK's Overseas Territories.
- 9.3.2. The South East Atlantic Fisheries Organisation (SEAFO) is an intergovernmental regional fisheries management organisation, established in 2003 with the entry into force of the Convention on the Conservation and Management of Fish Resources in the South East Atlantic Ocean. The Convention seeks to ensure the long-term conservation and sustainable use of fish stocks (excluding tuna and tuna-like species) within its geographical area. The Convention was signed by the UK on behalf of St Helena, Ascension and Tristan da Cunha in 2001, and entered into force in 2003. Its Secretariat has been located in Walvis Bay, Namibia, since 2005. Although St Helena has enacted enabling legislation (see para 8.1.3 above) it does not participate in Commission activities, both on account of the Convention's focus on species that are of little or no current interest to the island, and because of the high cost of membership.

9.4. European Community regulation

- 9.4.1. On 16 October 2009, the Standing Committee on Food Chain and Animal Health voted to adopt a Commission Decision amending Annex II of Commission Decision 2006/7666/EC to add St Helena to the list of third countries and territories from which imports to the European Community of fishery products for human consumption are permitted. St Helena has given assurances that fishery products exported to the Community will meet the required sanitary conditions laid down in Community legislation to protect the health of consumers. The Falkland Islands is the only other UK Overseas Territory with equivalent status. The islands of Tristan da Cunha and Ascension are specifically excluded from St Helena's listing in Annex II.
- 9.4.2. As St Helena exports fish and fish products to the European Community it also complies with Council Resolution (EC) No 1005/2008 which requires all fisheries related products to be accompanied by catch certificates. This is to ensure

product traceability throughout the chain of custody, both to help streamline trade processes and to prevent, deter and eliminate illegal, unreported and unregulated (IUU) fishing.

10. RESEARCH AND TRAINING

10.1. Exploratory fishing and scientific research

- 10.1.1. Fisheries investigations, in the form of commercial trial fishing and scientific exploratory fishing, aimed at developing the sector, have been undertaken intermittently since 1945.
- 10.1.2. Three exclusive commercial licences were issued to companies based outside St Helena, in 1947, 1955 and 1966, with a view to establishing export-orientated fisheries. The first two of these ventures failed to prosper because of poor catches; and the third, despite some investment in fish processing facilities at Rupert's Bay, was terminated in 1974 when the Government determined that the company's performance failed to meet the requirements of its licence.
- 10.1.3. Following the establishment of the St Helena Fisheries Corporation in 1979 (see above), an aid-funded inshore fisheries development programme, aimed at promoting reliable production of salt-dried skipjack tuna for which there was a ready market in South Africa, was started in 1984. This programme also included investigations into: the local lobster resources (both 'stump' *Scyllarides herklotsii* and 'longlegs' *Panulirus echinatus*); suitable boat designs for inshore fishing; and alternative fishing gear (see Ninnes, 1987).
- 10.1.4. In 1985 an aid-funded offshore fisheries survey started to investigate potential resources of St Helena's EEZ, in particular those associated with the seamounts. These surveys showed promising results (Hoogesteger, 1988) as a result of which further UK aid funds were provided for a project to upgrade the fishing fleet and the development of the St Helena Fisheries Corporation's facilities and services at Rupert's Bay.
- 10.1.5. Argos Helena Ltd, in conjunction with the Taiyo Fishing Company, using a chartered Taiyo vessel, KINPO MARU 58, carried out the first phase of an exploratory fishing trial for the commercially valuable red crab (*Geryon maritae*) during August and September 1996. Fishing took place at the Cardno and Bonaparte seamounts and on the shelf areas around St Helena and Ascension at depths of 100-700m. Catch rates proved to be uneconomical for the size of vessel used (50m) and various technical difficulties with the gear, including high levels of pot losses due to the rocky ground, were experienced. Plans for a second trial using a smaller vessel did not materialise.
- 10.1.6. In November 2000, an exploratory fishing trial was undertaken by Argos Helena Ltd to investigate the potential of the fish resources within the EFZs (beyond the 12nm territorial waters of St Helena and Ascension Island), using the 53m longliner 'ARGOS HELENA', whose gear was designed for the South Georgia Patagonian toothfish fishery. Again, the catch rates were uneconomic for a vessel of this size. The St Helena Government's observer for this voyage cautioned in his report that it would be unwise to try to develop the offshore fishery without more information on resource potential gained from experimental fishing on a year-round basis (see Sim, 2000)
- 10.1.7. A scientific survey of the population of grouper (*Epinephelus adscensionis*) was undertaken by international experts in May and June 2006 to determine appropriate stock conservation measures. In the face of evidence that the stock

was under pressure, recommendations were made: that the existing total allowable catch should be maintained at the existing level (36t/yr); that no-take zones should be established on the north and west coasts of the island; and that a minimum size limit (35cm total length or 1kg live weight) be imposed (see Choat and Robertson, 2009).

- 10.1.8. In June 2013, an exploratory fishing trial for a 6 month period was undertaken by GlobalFish South Africa under licence with SHG to investigate the potential of the fish resources within the EFZs (beyond the 12nm territorial waters of St Helena), using the 29m pole and line fishing vessel 'SOUTHERN CROSS. During the period June to September 2013, the vessel undertook two fishing trips between St Helena and Cape Town, South Africa in which a total amount of 112/t of fish consisting of bigeye and yellowfin tuna were landed. The trial was later aborted due in part to mechanical failures with the vessel.
- 10.1.9. In November 2013, the 11 meter fishing vessel Argonaut, owned and operated by Argos Atlantic Cold Stores Limited, undertook a period of longline fishing within the inshore waters whereby 6.5/t of swordfish was landed during the first five months of operation. The operation was later curtailed due to health concerns on the level of mercury content found in the fish not meeting the levels applicable to the EU.
- 10.1.10 Following on from the exploratory fishing trial undertaken by GlobalFish in 2013, a contract was entered into between SHG and the local company, Saint Marine Resources Limited (SMRL) to carry out exploratory fishing trials using MFV Extractor for a period during 2014/2015. The data collected from this exercise will be included for analysis with other data collected from two local vessels that is expected to be operating offshore during 2015.
- 10.1.11 Routine monitoring of catch and effort is undertaken by the Directorate of Fisheries on the basis of data provided by the St Helena Fisheries Corporation.

10.2. Training

10.2.1. There are currently no courses offered on the island either in maritime studies at secondary school level, or of a vocational nature for workers in the fishing industry who wish to upgrade their technical skills. Various courses in business management etc are, however, offered by the Lifelong Learning Service, and Enterprise St Helena offer Skills Development Grants and Loans. Options are currently being explored for the potential delivery of a Maritime Training Project during 2015/16, which is to be focused on up-skilling local vessel owners / operators.

11. DEVELOPMENT ASSISTANCE

11.1. UK

11.1.1. The UK Overseas Development Administration (now Department for International Development) financed several projects, including resident technical advisers, in the 1980s and 1990s to support resource assessment, inshore fishing fleet development, and the operations of the St Helena Fisheries Corporation. The most recent of these projects, which financed additional infrastructure and equipment to enable the Corporation to implement its business plan, was completed in 1997.

11.1.2 The UK Department for International Development (DfID) has recently provided Sector Support and Fishing Stock Assessment funding through Enterprise St Helena. This funding has also allowed for a number of infrastructure and equipment projects to be implemented by the Fisheries Task Force, such as Satellite AIS; a Vessel Monitoring System terrestrial station and trackers for the local fleet; inshore trials of Fish Aggregation Devices; and equipment for Alternative Fishing Methods, namely Green Stick and Micro-spool Long Lining.

11.2. Other sources

11.2.1. The European Commission is a potential source of support for the sector, but attempts to attract funding through EDF9 (regional), EDF10 (thematic), and research funding lines, have been unfruitful so far. As an Overseas Territory, St Helena is not generally eligible for financial or technical support from multilateral agencies.

12. INTERNET LINKS

Government of St Helena – <u>www.sainthelena.gov.sh</u>

Enterprise St Helena – <u>www.investinsthelena.com</u>

Tourism - www.sthelenatourism.com

Bank of St Helena – www.sainthelenabank.com

13. REFERENCES AND SOURCES

(Copies of the documents listed below are held by the Fisheries Directorate of the Agriculture and Natural Resources Department. As many of them are internal reports that have not been formally published, they may be unavailable elsewhere. Any enquiries should be addressed to: sfo@anrd.gov.sh).

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Thomas, E. 2001. *Observer's report on swordfish campaign by 'Argos Helena', 19 Oct-17 Nov 2001.* Internal report to St Helena Government.

UK Hydrographic Office. 2003. Admiralty Chart 4021 (Edition No 4): South Atlantic Ocean Eastern Part.

ANNEXES

- A. Fishery production statistics
- B. Numbers of fishermen and vessels

Fisheries Section Agriculture and Natural Resources Division St Helena Government June 2015

ANNEX A

St Helena - Fishery production by weight (tonnes) 2005-2014

		<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>
Yellowfin tuna	(Thunnus albacares)	255	363	177	97	104.28	64.72	165.68	149.17	52.75	151.76
Albacore	(Thunnus alalunga)	35	62	46	94	81.13	2.61	120.37	1.60	2.15	0
Bigeye tuna	(Thunnus obesus)	18	25	18	28	17.13	11.18	189.89	51.29	21.48	17.38
Skipjack tuna	(Katsuwonus pelamis)	320.74	88.32	109.7	45.35	152.16	250.45	371.05	29.24	6.84	25.91
Wahoo	(Acanthocybium solandri)	11.38	20.06	12.65	18.48	29.36	18.71	31.09	11.55	15.86	16.06
Grouper	(Epinephelus adscensionis)	20.61	10.84	40.15	11.48	8.10	13.42	8.20	10.02	3.62	1.45
Mackerel	(Scomber japonicus)	0.09	1.84	1.4	0.8	1.19	7.95	2.15	1.85	1.12	1.87
Lobster	(Scyllarides herklotsii)	0.05	0	0	0	0	0.16	0	0.08	0	0
Marlin	(Istiophoridae)	1.66	2.07	2.71	3.69	2.98	1.50	2.38	12.45	2.30	1.25
Conger	(Muraenidae)	1.6	1.8	4.3	3.49	2.52	5.09	1.88	4.09	2.52	0.42
Cavalley	(Carangidae)	1.2	1.05	2.46	2.61	2.46	2.82	1.19	1.67	1.05	0.68
Bullseye	(Cookeolus japonicus)	1.11	2.08	3.3	1.66	1.09	0.69	0.30	0.48	1.17	0.10
Soldier	(Holocentridae)	0.06	0.07	0.05	0.12	0.02	0.23	0.03	0.03	0.01	0
Yellowtail	(Seriola lalandi)	0.29	0.48	1.38	1.43	0.58	1.49	0.31	0.28	0.54	0.40
Sharks	(Elasmobranchii)	0.48	0.34	0.33	0.33	0.41	0.32	0.41	0.27	0.45	0.18
Dorado	(Coryphaena equiselis)	0.49	2.36	0.54	0.29	0.74	1.65	1.66	0.51	0.65	0.47
Filefish	(Monacanthidae)	0.24	0.42	0.38	0.46	0.44	0.79	0.20	0.44	0.08	0.02
Swordfish	(Xiphias gladius)	0	0	0	0	0	0	0	0	4.99	6.41
Other	(Osteichthyes)	0.55	0.32	0.6	0.58	0.31	1.27	1.91	0.25	0.16	0.43
TOTAL		668.55	582.05	420.95	309.77	404.89	385.04	898.71	275.32	117.75	224.86

ANNEX B

	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>
<u>Fishermen</u>										
Full time	31	28	28	19	25	21	26	23	24	16
Part-time	4	12	6	4	4	6	12	4	1	7
Occasional	16	19	3	8	3	10	6	6	1	6
<u>Boats</u>										
Operational	27	30	21	18	17	21	23	21	14	18
Full-time	12	11	12	10	12	11	10	10	9	9

St Helena - Numbers of fishermen and boats (2005-2014)