



# **PUBLIC SUMMARY: SITUATIONAL ANALYSIS OF THE ST HELENA FISHING INDUSTRY**

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## **Introduction**

This report brings together more than five decades of evidence and recent stakeholder experience to answer a simple question: what has really happened to St Helena's fishing industry, and what can the evidence tell us about its future? The findings challenge a number of common assumptions. They suggest that export fishing has always been smaller than often perceived, that SHG support has always been a significant part of the sector, that the events of 2020 fundamentally changed industry structures, and that many current disagreements are rooted as much in governance, trust and market arrangements as in fishing itself.

## **Examples of Findings**

### **1. The export industry has always been much smaller than many people believe**

A key finding is that fishing for export has never been the dominant part of the sector. Over the long term, export volumes have been relatively modest and a significant proportion of fish caught around St Helena has been consumed locally. The report challenges the perception that the island once had a large-scale export industry that subsequently collapsed. Instead, it presents evidence that export success has always been constrained by scale, distance from markets, transport costs and fluctuating tuna availability.

**Why this matters:** It changes the question from "how do we restore the industry to what it was?" to "what level of commercial fishing is realistically achievable?"

### **2. Government support has been a permanent feature of the industry**

The report finds that neither local market fishing nor export fishing has historically operated entirely without government assistance. Successive governments have subsidised infrastructure, fuel arrangements, processing facilities, regulation, scientific monitoring and fisheries management. The idea that there was once a completely self-sustaining commercial fishery is not supported by the evidence reviewed.

**Why this matters:** Future policy discussions may need to focus on what level of subsidy is reasonable and sustainable, rather than whether subsidy should exist at all. Also on how the cost of a subsidy to SHG could be recovered through revenue.

### **3. The industry changed fundamentally in 2020**

The report identifies 2020 as a significant turning point. The closure of SHFC, loss of export processing arrangements, temporary government management of facilities and the emergence of informal sales arrangements altered the structure of the industry in ways that continue to influence today's debates.

**Why this matters:** Many current disagreements are linked not simply to fishing itself but to how this transition was managed and experienced by different groups.

### **4. Current disagreements are often about systems, not fish stocks**

The report suggests that many of the strongest disputes within the sector are not primarily about the quantity of fish available. Instead, they concern licensing, processing arrangements, market access, fairness, regulation and trust in decision-making processes.

**Why this matters:** Solving governance and relationship issues may be just as important as addressing biological or economic issues.

### **5. The informal fish market became economically significant**

One of the report's central findings is that informal fish sales developed from a temporary emergency arrangement into an established feature of the market. This has implications for food safety regulation, public investment in processing infrastructure and the commercial operation of licensed facilities.

**Why this matters:** Future decisions may need to address whether current market arrangements support or undermine long-term investment in fish processing.

### **6. Evidence and perceptions often point in different directions**

The report repeatedly distinguishes between documented evidence and stakeholder perceptions. It concludes that both influence the industry. Recorded facts help explain what happened institutionally, while perceptions help explain why people behaved as they did, why trust was lost in some cases, and why some policies remain controversial.

**Why this matters:** Future policy options may struggle to succeed if they address technical issues but ignore stakeholder confidence and relationships.

### **7. The economics of offshore fishing remain uncertain**

The report raises questions about the long-term commercial viability of offshore fisheries under current conditions, particularly given fuel costs, processing costs, export logistics and local catch limits. While it does not advocate any specific policy response, it identifies economic sustainability as a major issue requiring further analysis.

**Why this matters:** The challenge may not simply be catching more fish; it may be whether fishing can generate sufficient returns after all costs are accounted for.

### **8. St Helena has strengthened conservation and governance**

The report finds that fisheries governance, conservation measures, legislation and regulatory arrangements are considerably more developed than in previous decades. While sometimes controversial, these developments have strengthened environmental stewardship and oversight of the sector.

**Why this matters:** The report does not present a story of decline. It identifies both progress and continuing challenges.