MEDIA SUMMARY

REPORT ON CONSULTATION ON THE FUTURE OF THE FISHING INDUSTRY: OPTIONS FOR POLICY

Why we have written this

Fishing matters to St Helena. It feeds families, it supports livelihoods and it is part of who we are. Most households expect fresh fish on the plate every week.

But the industry faces real difficulties. Relationships between fishers, the fish processing plant and government are strained. Exports have not grown as hoped. There are ongoing concerns about how fish is sold locally and whether existing regulatory arrangements remain fit for purpose. And there are very few fishers under 30 years old.

In 2025 the new government asked the public service to look at the whole industry and set out the choices. That work has produced two documents.

The first was the working document a *Situational Analysis of the St Helena Fishing Industry*, published in June 2026. It set out the facts and the history. It did not make recommendations. Edits are being made as a result of the work of the *Future of the Fishing industry: Options for Policy* document and the consultation. This second document sets out the options for a future fishing policy. It did not recommend any options. That will follow once government has considered the findings of the consultation (this document). The options, which may not be an either or all situation, will be presented as a potential policy to government.

The consultation and an overview of findings

The St Helena Government recently asked people for their views on the future of the island's fishing industry. The consultation ran between September and October 2026 and attracted 19 individual and group responses from fishers, industry representatives, councillors,

organisations and members of the public. The purpose was to gather views on a range of policy options, not to ask people to vote for a preferred solution. The consultation provides valuable insight into stakeholder views but should not be regarded as a statistical survey of public opinion.

The consultation found that there is actually much more agreement than disagreement about the future of fishing on St Helena. Most people want to see the same overall outcome: a fishing industry that is environmentally sustainable, economically viable, provides jobs and livelihoods, supplies local people with fish and contributes to the island's wider economy. Differences of opinion are mainly about how to achieve those goals rather than the goals themselves.

The strongest and most consistent message was the importance of supplying fish to the local community. Many respondents felt that ensuring local people have access to affordable fish should remain a top priority. Fish was frequently linked to food security, health and community wellbeing. While some people support developing export markets, many stressed that local needs should come first.

Views were more divided on exports. Some respondents believe there may be opportunities to grow the industry through niche export markets, particularly by promoting St Helena's sustainable one-by-one fishing methods. Others pointed to the challenges of freight costs, energy prices, market access and previous difficulties with export ventures. Overall, the consultation concluded that export opportunities should not be ruled out, but that their commercial viability remains uncertain and requires further assessment.

One area where there was particularly strong agreement was infrastructure. Participants consistently highlighted the need for improvements to facilities such as access to ice production, cold storage, fish landing facilities, processing facilities and harbour infrastructure. Many people believed that investing in these areas would benefit the industry regardless of the direction future policy takes.

The consultation also revealed concerns about trust and confidence within the sector. Respondents raised issues relating to fisheries management, decision-making processes, scientific evidence, fish processing arrangements and communication. While people did not always agree on the causes of these concerns, there was widespread recognition that improving trust, transparency and stakeholder relationships will be important for the future success of the industry.

There was support for reviewing institutional arrangements and improving leadership, accountability and coordination within the sector. However, respondents were generally more interested in improving how organisations work together than in creating entirely new structures.

The consultation also showed strong support for maintaining environmental protections. Most respondents supported continued participation in the International Commission for the Conservation of Atlantic Tunas (ICCAT), retaining the Marine Protected Area (MPA) and continuing St Helena's traditional one-by-one fishing methods. There was very little support for withdrawing from ICCAT, revoking MPA status or introducing mini-spool long-line fishing.

Another recurring theme was concern about the ageing profile of the fishing workforce. Many respondents felt more needs to be done to attract younger people into the industry. However, they also noted that recruitment challenges are closely linked to the economic viability of fishing and the need to ensure it remains an attractive occupation.

Overall, the consultation did not identify one clear model for the future of the fishing industry. Instead, it highlighted broad agreement around several priorities: improving local fish supply, strengthening the industry's economic viability, investing in infrastructure, maintaining environmental sustainability, attracting future generations of fishers, improving evidence and transparency, and rebuilding trust between stakeholders. Respondents generally supported practical improvements and collaboration over more radical changes to fisheries management arrangements.

The findings will help inform the finalisation of the *Future of the Fishing Industry: Options for Policy* work and future decisions on the development of St Helena's fishing sector.

REPORT ON CONSULTATION ON THE FUTURE OF THE FISHING INDUSTRY: OPTIONS FOR POLICY

Ann Muir
HOSP
9 November 2026
Ann.Muir@sainthelena.gov.sh

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EXECUTIVE SUMMARY

The *Future of the Fishing Industry: Options for Policy (FOP)* consultation was undertaken between 14 September and 23 October 2026. Nineteen responses were received from fishers, industry stakeholders, members of the public, councillors and organisations. These responses included the minutes from three public meetings, the minutes of one meeting of councillors and commercial fishers, a response from one international organisation and 11 responses from individuals. The consultation provides valuable insight into stakeholder views but should not be regarded as a statistical survey of public opinion.

The consultation sought views on a range of policy options for the future development of St Helena's fishing industry. It did not seek views on a preferred policy outcome. Some of the views expressed in the consultation are closer to perceptions than facts and should not be understood as facts. The evidence base informing the consultation is set out in the *Situational Analysis of the St Helena Fishing Industry (FRSA)*.

The consultation revealed considerably more agreement than disagreement regarding the desired future of the fishing industry. Most respondents supported the overarching objective of a sustainable and economically viable fishing industry that provides livelihoods, supports food security, supplies local consumers, protects fish stocks and contributes to St Helena's economic development. Differences of opinion were generally concerned with how these objectives should be achieved rather than the objectives themselves.

The most consistent theme throughout the consultation was the importance of maintaining a reliable and affordable local fish supply. Respondents frequently emphasised the role of fisheries in food security, public health and community wellbeing. Although views differed regarding exports, there was widespread support for ensuring that local needs remain a priority.

The consultation did not demonstrate a clear consensus regarding export development. Some respondents viewed export markets as an opportunity to support industry growth and economic development, while others highlighted the challenges posed by scale, freight costs, energy costs and market access. The consultation therefore suggests that export opportunities should remain under consideration but that their commercial viability requires further assessment before major investment decisions are taken.

Infrastructure emerged as one of the strongest areas of consensus. Respondents consistently identified improvements in landing, handling, ice production, storage and processing facilities as priorities capable of supporting the industry under a range of future scenarios, especially to support the range of types of fishing that takes place outside of tuna. Infrastructure investment was viewed as likely to benefit both local market supply and any future export development.

Trust and confidence were recurring themes throughout the consultation. Concerns were expressed regarding fisheries management, consultation processes, processing arrangements and decision-making. While opinions differed regarding causes, there was broad recognition that constructive working relationships, transparency and effective communication will be important to successful implementation of future fisheries policy.

Consultation responses regarding governance and institutional arrangements were mixed. Some respondents called for stronger leadership, greater accountability and improved coordination, while others focused on specific decisions or expressed confidence in existing arrangements. Overall, the consultation provides moderate support for governance reform and stronger support for improved leadership, coordination and clarity of responsibilities than for any particular organisational model.

There was strong support for maintaining sustainable fisheries management, continued participation in ICCAT, retention of the Marine Protected Area and the continuation of one-by-one fishing methods. Conversely, there was very limited support for withdrawing from ICCAT, revoking MPA status, mini-spooling long-line fishing or closing fish processing facilities.

The consultation also identified concern regarding the ageing fishing workforce and the need to attract and support new entrants. Respondents frequently linked workforce challenges to wider economic conditions and the long-term commercial viability of fishing as a livelihood.

Overall, the consultation does not identify a single preferred model for the future fishing industry. However, it demonstrates broad agreement on the need to improve local fish supply, strengthen economic viability, invest in infrastructure, maintain environmental sustainability, support future generations of fishers and improve the evidence base informing decision-making. The consultation generally strengthens options focused on trust, infrastructure, local supply, workforce development and strategic leadership, while providing weaker support for more radical changes to fisheries management, ICCAT membership or MPA status.

In summary, the consultation suggests that the future success of the fishing industry is likely to depend less on any single intervention and more on a combination of improved economic viability, practical infrastructure investment, effective leadership, credible evidence and constructive collaboration between stakeholders.

1 INTRODUCTION

The *Future of the Fishing Industry: Options for Policy* (FOP) was out for public consultation between the 14 September 2026 and the 23 October 2026. This document focused on options to be considered for a new fisheries policy: it did not make recommendations. The evidence base informing the options can be found the in *Situational Analysis of the St Helena Fishing Industry* (FRSA). This was a working document, and its contents have been updated in light of consultation responses from FOP.

A total of 19 responses were received from fishers, other industry stakeholders, members of the public and councillors. It is estimated that about 10 people contributed to several different responses. Therefore, the findings should be interpreted as indicative rather than statistically representative. Several responses reflected contributions from multiple participants, while some individuals contributed to more than one submission. Some of the views expressed in the consultation are closer to perceptions that facts and should not be understood as facts. The consultation therefore provides valuable qualitative evidence regarding stakeholder views but cannot be regarded as a quantitative survey of public opinion.

2 THEMES

Drawing together all consultation responses, stakeholder meetings, interviews, written submissions and organisational responses, a number of clear themes emerge. While stakeholders often disagree on causes and solutions, there is significantly more consensus on the challenges facing the industry than may initially appear.

2.1 Broad agreement on the outcome

Perhaps the most important finding is that almost all contributors support the same broad objective:

> A sustainable, economically viable fishing industry that provides livelihoods, supplies local consumers, protects fish stocks and contributes to the future prosperity of St Helena.

Disagreements largely concern how that objective should be achieved rather than the objective itself.

2.2. Supplying the local market Is the highest priority

This was the most consistently expressed theme across consultations. Stakeholders repeatedly argued that:

- Fish should be available, accessible and affordable for local residents.
- Food security should be a fisheries objective.
- Local supply should take priority over exports.
- Existing arrangements do not consistently meet community demand.
- Fish consumption contributes to health and wellbeing.
- Ground fishing, mackerel fishing, and other types of fishing beyond pelagic tuna should not be neglected in policy.

Many respondents summarised their position as *fish on local plates first; export second*.

However, there was also recognition that the local market alone may be insufficient to support a larger commercial fishing fleet or absorb substantially increased tuna catches.

Concerns regarding local fish supply appear to reflect wider uncertainty regarding the effectiveness of current sector arrangements. Respondents frequently associated supply challenges with infrastructure, institutional and market factors rather than resource availability alone.

2.3 Export viability remains the central strategic uncertainty

The consultation reveals no consensus regarding exports. In arguments supporting export development stakeholders noted that:

- Significant tuna resources remain unused.
- Premium niche markets may exist.
- One-by-one fishing offers potential market differentiation.
- Sustainability credentials may create value.
- Export may be necessary to maintain the current fleet and to support its expansion.

In arguments questioning export development others argued that:

- Previous export models struggled financially.
- Freight and transport costs are major obstacles.
- Energy costs are high.
- Market access remains uncertain.
- Export has historically relied on subsidy.

The overall conclusion is that export viability remains unproven rather than disproven. Further commercial assessment is required, preferably by the private sector with a commercial interest, rather than by government.

Concerns regarding processing capacity for export appear to be a proxy for wider concerns about trust, transparency and confidence in decision-making. Stakeholders frequently cited capacity issues despite often having limited access to operational data. The importance of the issue may therefore lie less in the capacity itself and more in stakeholder confidence that resources are being used effectively.

Consultation evidence does not support prioritising these export options at this stage, although they remain available for consideration should future evidence demonstrate commercial viability.

2.4 Fisheries infrastructure is widely viewed as inadequate

One of the strongest areas of consensus concerns infrastructure. Repeated issues included:

- Ice production.
- Cold storage.
- Processing facilities.
- Wharf facilities.
- Fish handling equipment.
- Hygiene facilities.
- Vessel support services.

Many participants believed that improving infrastructure could deliver substantial benefits regardless of the wider policy direction eventually chosen. Specific suggestions included:

- Wharf-based ice plant.
- Better landing and handling arrangements.
- A community processing facility.
- Shared cold storage.
- Improved cleaning and waste facilities.

2.5 Fish processing plant operations is the most contested issue

The fish processing facility and the role of STC generated more disagreement than almost any other topic. Stakeholders expressed concerns regarding:

- Processing capacity.[1]
- Throughput levels.
- Utilisation of public investment.
- Fish acceptance practices.
- Export performance.
- Future ownership and control arrangements.

At the same time, it was repeatedly acknowledged that:

- Lease arrangements constrain government intervention.
- The facility remains a potentially valuable asset.
- An independent assessment of capacity and future options may be needed.

2.6. Trust is the single most consistent issue across the consultation

Trust emerged repeatedly regardless of stakeholder affiliation. Examples included distrust of:

- SHG.
- Previous fisheries decisions.
- Local TAC and quota systems.
- The fish processing plant operation.
- Scientific assessments.
- Consultation processes.
- Historical industry decisions.

Some contributors argued that even technically sound solutions are unlikely to succeed unless confidence and trust improve. Trust therefore appears both a governance challenge and a practical prerequisite for implementation.

2.7 Institutional and regulatory arrangements require review

Consultation responses regarding people and organisation capacity were mixed. While some respondents expressed concerns regarding decision-making and accountability, others expressed confidence in existing arrangements or focused their comments on specific decisions rather than institutional structures. Consequently, consultation evidence provides only moderate support for institutional reform, although there is broader support for clear leadership, coordination and strategic direction.

[1] Concerns that the receiving area and processing capacity were reduced were subsequently challenged by STC.

Those who questioned whether existing institutional arrangements remain fit for purpose suggested:

- Clearer accountability.
- Greater separation of policy and regulation.
- Stronger fisheries leadership.
- Separation of the chief fisheries officer function from the ENRP directorship.
- A dedicated fisheries authority.
- More transparent decision-making.

Importantly, stakeholders generally focused less on the need for new legislation and more on improving implementation, enforcement and institutional effectiveness.

2.8. ICCAT, quotas, local TACs, vessel quotas and fisheries management are contested

Management measures remain controversial, particularly:

- Grouper local TAC and vessel quotas (this will be reviewed before the end of 2026).
- Local TAC calculations for tuna.
- Vessel quota allocation arrangements.
- The balance between scientific evidence and fisher knowledge.

At the same time:

- There is broad support for sustainable fishing.
- There is little support for unrestricted exploitation.
- Most participants support protection of fish stocks.

A key observation is that objections are often directed at management approaches rather than conservation objectives themselves.

2.9 Strong support exists for the MPA, ICCAT and one-by-one fishing

Despite disagreements on management arrangements, several features enjoy broad support: most stakeholders support maintaining the MPA, although views vary regarding scale and management.

There was very limited support for withdrawing from ICCAT and widespread recognition of its importance for managing migratory tuna stocks.

One-by-one fishing attracted some of the strongest support of any issue discussed and is increasingly viewed as:

- A sustainability asset.
- A cultural asset.
- A marketing advantage.

2.10 Industry economics are a major constraint

Many fishers expressed concerns regarding:

- Fuel costs.
- Equipment costs.
- Vessel maintenance.

- Processing charges.
- Market returns.
- The current weak state of the global tuna market.

There is widespread concern that current economics may not provide sufficient incentives for:

- New entrants.
- Investment.
- Fleet renewal.
- Expansion of fishing effort.

2.11 Fishing faces an ageing workforce and succession challenge

Almost every strand of consultation highlighted concerns regarding demographics. Stakeholders repeatedly noted:

- An ageing fishing workforce.
- Few younger entrants.
- Skills retention issues.
- Uncertain long-term succession.

However, many participants argued that poor economics rather than lack of interest may be discouraging younger people from entering the industry.

2.12 Better data, evidence and transparency are required

One of the strongest cross-cutting findings concerns confidence in evidence. Stakeholders frequently requested:

- Better catch data.
- Better market information.
- More transparent assumptions.
- Clear distinction between facts and opinions.
- Improved traceability.
- Better monitoring systems.
- Greater use of specialist expertise.

Some stakeholders considered that future policy documents should clearly distinguish between:

- Established evidence.
- Stakeholder perceptions.
- Contested claims.
- Assumptions.
- Policy judgements.

2.13 Significant interest exists in alternative fishery opportunities

Stakeholders proposed numerous alternative opportunities, including:

- Community processing facilities.
- Premium tuna branding.
- Value-added processing.
- Canning.
- Fish oils.

- Fish meal.
- Pet food products.
- Tourism-related fisheries experiences.
- Landing-site processing.
- Shared infrastructure models.

Views expressed by some consultees appeared more optimistic about value-added approaches than traditional frozen tuna exports.

2.14 Section conclusion

The consultation evidence suggests that the principal barriers to fisheries development are not primarily fish abundance, conservation measures or access to resources. Instead, the dominant challenges are:

a) Establishing a commercially viable industry model.
b) Maintaining a reliable local fish supply.
c) Determining the future role of export markets.
d) Improving infrastructure and processing arrangements.
e) Addressing institutional and accountability concerns.
f) Rebuilding trust among stakeholders.
g) Attracting and retaining future generations of fishers.
h) Strengthening the evidence base for future decisions.

Taken as a whole, the responses point towards a future fisheries strategy that is likely to require a combination of stronger local market arrangements, targeted infrastructure improvements, improved governance, better evidence, and careful assessment of export opportunities rather than reliance on any single intervention.

3 CROSS-CUTTING FINDINGS AND STRATEGIC INSIGHTS

3.1 The debate is less polarised than it first appears

While stakeholders often appear divided, there is substantial agreement on fundamental objectives. Most participants support:

- Sustainable use of marine resources.
- Continued access to fishing livelihoods.
- Reliable local fish supply.
- Improved fisheries infrastructure.
- Stronger governance and accountability.
- Long-term protection of fish stocks.

Areas of disagreement relate primarily to the means of achieving these objectives, particularly the balance between local supply and exports, the role of STC, and the interpretation of fisheries management measures.

Implication: Future policy may be more successful if framed around shared objectives rather than competing stakeholder positions.

3.2 Many disputes reflect differences in interpretation rather than differences in evidence

Throughout the consultation stakeholders frequently interpreted the same evidence differently. Examples include:

- Unused ICCAT tuna quotas being viewed either as evidence of missed opportunity or evidence that larger markets do not exist.
- Historical exports being viewed either as proof exports can succeed or proof they are structurally unviable.
- Processing capacity being interpreted as either a market constraint or a symptom of low landings.

This suggests that disagreements are often underpinned by differing assumptions rather than wholly conflicting facts.

Implication: Decisions should clearly separate factual evidence, assumptions, stakeholder perceptions and policy judgements.

3.3 Trust represents a bigger constraint than infrastructure or regulation

Trust emerged in almost every consultation exercise regardless of topic. Concerns were expressed regarding:

- Fisheries management decisions.
- Scientific assessments.
- Vessel quota setting.
- Processing arrangements.
- Government decision-making.
- Consultation processes.

Notably, trust concerns arose even where stakeholders broadly agreed on policy objectives.

Trust emerged not simply as a stakeholder concern but as a potential constraint on implementation. Regardless of the technical merits of any future fisheries model, stakeholder resistance may reduce compliance, limit cooperation and undermine confidence in management decisions. Consequently, institutional arrangements may be as important to long-term success as the operational model itself

Implication: Rebuilding confidence may be a prerequisite for successful implementation of any future fisheries strategy.

3.4. Economic viability is the core issue underlying many other problems

Many consultation themes can be traced back to underlying economic challenges.
For example:

Issue	Underlying economic driver
Ageing workforce	Fishing may not provide attractive income opportunities
High barriers to entry and high overheads	High capital demands to buy and equip a vessel.
Low investment	Commercial returns may be insufficient

Infrastructure underutilisation	Catch volumes may be too low
Export uncertainty	Global market and margins may be too narrow
Recruitment difficulties	Alternative employment may be more attractive

Viewed collectively, concerns about ICCAT quotas, local TACs, vessel quotas, the local market exports, infrastructure and succession ultimately converge on the question: can fishing for the local market and export provide a viable and attractive business proposition?

Implication: Industry economics should remain central to future policy development.

3.5 Infrastructure is consistently identified as an investment area

Stakeholders disagreed on exports, catch quotas and institutional structures but showed notable agreement on the need for:

- Ice production.
- Storage.
- Fish handling facilities.
- Processing facilities.
- Wharf infrastructure.

These improvements were identified as beneficial under almost every future scenario.

Implication: Infrastructure improvements may represent lower-risk interventions capable of delivering benefits regardless of future policy direction.

3.6. Local supply and export development should not necessarily be viewed as competing objectives

The consultation often framed discussion as a choice between local supply and exports. However, many responses suggest a more nuanced position. Several stakeholders recognised that:

- Local supply should remain the priority.
- The local market alone may not sustain industry growth.
- Export opportunities may only become relevant once local demand is met.
- Different market outlets may be needed for different species and product grades.

Implication: A future strategy may benefit from viewing local and export markets as complementary rather than mutually exclusive.

3.7 Institutional reform has stronger consensus than support for commercial or operational proposals.

Across multiple responses there was support for:

- Clearer responsibilities.
- Independent regulation.
- Improved accountability.
- Transparent decision-making.
- Better evidence systems.

There was considerably less consensus regarding:

- Export-led growth.
- Processing models.
- STC's future role.
- Quota reform.

Implication: Institutional reform may represent the area where progress can be achieved most readily.

3.8 Climate change

Although not strongly raised during consultation, climate change remains a long-term strategic uncertainty identified in the FRSA.

3.9 Section: strategic assessment

The consultation does not identify a single preferred future for the St Helena fishing industry. However, it demonstrates substantial agreement regarding the challenges facing the sector. Across almost all stakeholder groups there is recognition that future success will depend upon improving economic viability, rebuilding trust, strengthening institutional relations, investing in critical infrastructure, supporting recruitment of new entrants and ensuring that decisions are informed by transparent and credible evidence. The principal disagreements concern the relative importance of export markets, processing arrangements and fisheries management measures rather than the overall objective of achieving a sustainable and prosperous fishing industry.

4 OPTIONS: LEVELS OF RESPONDENTS' SUPPORT

4.1 Options: findings and implications

Based on the consultation responses, the table below assesses what the responses appear to mean for each FOP option. It is focused on the strength of support emerging from the consultation, rather than the original FRSA and options appraisal. Support levels reflect the relative strength and frequency of themes emerging from consultation responses and should not be interpreted as voting outcomes. The responses suggest there is much greater consensus on local supply, infrastructure and trust than on exports, quotas or institutional restructuring.

Topics which did not come up in the consultation, but which are discussed in the FRSA and FOP include:

- maritime regulation
- vessel safety standards (which is being consulted on separately).

Table 4.1: Options: findings and implications

FOP Option	What the Consultation Responses Mean	Overall Implication
2.1 Rebuild stakeholder and public trust (a process outcome)	Trust was the single most common issue raised. Distrust of government, processors, science, TACs and consultation processes appeared throughout responses.	Strong support. Likely prerequisite for all other options.
2.2 Maintain the current situation	There is deep dissatisfaction with the current situation	Not an option

2.3 The local informal fish market	Stakeholders disagree on the extent to which current arrangements constitute an informal or illegal market, although there is broader agreement that enforcement and regulatory clarity require improvement. Stakeholders want safe fish but many support current informal marketing arrangements. Enforcement alone would likely be unpopular unless alternatives are available.	Limited support as a stand-alone option.
	Strong recognition that current arrangements provide local access to fish. However, concerns remain about food safety, traceability and export credibility. Stakeholders support access to fish but concerns regarding traceability and food safety remain unresolved	Moderate support but significant trade-offs.
	Strong stakeholder interest in community processing, smaller local facilities and reducing reliance on a single processor.]	One of the more strongly supported options.
	Infrastructure improvements attracted broad support and are seen as a practical solution regardless of future export decisions.	Strong support. A potential investment.
2.4 Grant licences to large offshore vessels.	Some support from those favouring export development, but concern over foreign vessels and uncertainty over export economics.	Mixed views; dependent on proving export viability.
	Little evidence of strong support. Concerns about local economic benefit, MPA credibility and fish landing opportunities.	Weak support.
2.5 Permit mini-spooling Long-Line Fishing	Responses strongly supported one-by-one fishing and viewed it as a cultural, conservation and marketing asset.	Likely significant opposition.
2.6.1 The fishing vessel licensing system	Consultation did not identify existing licensing categories as a major problem.	Generally acceptable.
	Little demand emerged for major licensing reform. May complicate management without solving principal concerns.	Limited support.
	Commercial fishers would like to see commercial licences limited to vessels where fishers rely on fishing for a livelihood	Support from commercial fishers
2.7 Reform of the diesel subsidy	Few responses focused directly on subsidy reform. Wider concern was fishing economics and costs.	Likely politically sensitive. Evidence for change limited.
2.8 Develop a scheme to attract people into commercial fishing	Strong concern regarding ageing fishers and lack of succession. Many respondents linked this to poor industry economics rather than lack of interest.	Strong support, provided incomes are viable.
2.9 At the end of the lease, tender for fish processing operations for local and export markets ….	Responses focused more on future ownership and plant performance than retaining the current arrangement indefinitely. Independent review of the plant was often suggested.	Potentially supported, but dependent on future evidence.
2.10 At the end of the lease, a new lease focuses on the local market…	Aligns closely with the strongest consultation theme: *local fish first*. However, some respondents still see export potential.	Moderately strong support.

2.11 At the end of the lease, sell the plant ….	Stakeholders questioned current ownership and institutional arrangements but showed no clear consensus on privatisation.	Uncertain support. Requires further analysis.
2.12 At the end of the lease, nationalise processing ….	Very little consultation evidence supporting government-run fish processing.	Weak support.
2.13 At the end of the lease, close the plant for fish processing	Most stakeholders viewed processing infrastructure as valuable even if critical of current arrangements	Generally opposed.
2.14 Establish a fisheries regulatory and development authority	Strong support for clearer accountability, stronger leadership, transparency and institutional reform. Many suggested restoring a fisheries leadership role, but not necessarily a new authority.	Strong support for institutional reform, though not necessarily for a new authority.
2.15 Withdraw from ICCAT	Very little support. Most respondents recognised ICCAT's importance.	Strongly opposed.
2.16 Review the MPA	Broad support for maintaining the MPA.	Strong support.
	Little clear evidence either way wrt establishing a no-take zone. Could attract support if funding benefits are demonstrated.	Uncertain / mixed.
2.17 Revoke MPA Status	Respondents overwhelmingly supported conservation, the MPA and the island's environmental credentials.	Strongly opposed.

4.2 Options: levels of support

Strongest Support	Moderate Support	Weakest Support
2.1 Rebuild stakeholder and public trust	2.10 Local market focus after 2031	2.15 Withdraw from ICCAT
2.3.3 Small processing units	2.4.1 Offshore vessels landing locally	2.17 Revoke MPA
2.3.4 Landing-site facility	2.9 At end of lease, retender plant	2.5 Mini-spool long-line fishing
2.8 New entrants/apprenticeships	2.11 At end of lease, sell plant	2.12 Nationalisation
2.14 Institutional reform	2.3.2 Legalise informal market	2.13 Close plant
2.16.1 Retain MPA	2.16.2 No-take zone	2.4.2 Offshore processing
Overall - continued conservation and one-by-one fishing	Export opportunities only if commercially proven	

The consultation overall appears to strengthen a local market with infrastructure, governance and a conservation package. It provides only cautious and conditional support for export led options and very little support for radical changes to ICCAT membership, the MPA or one-by-one fishing.

Overall institutional reform has stronger consensus than support for commercial or operational proposals.

4.3 Strength of evidence presented in the consultation

Table 4.3: Evidence, Perceptions, Analytical Interpretation and Confidence Assessment

Key:

Evidence refers to factual information derived from data, published reports, operational records, monitoring results, financial information, scientific studies or other verifiable sources. Evidence is distinct from stakeholder perceptions, experiences or opinions, although these may themselves provide valuable qualitative evidence regarding stakeholder views.

Analytical interpretation is what the issue means for policy and decision-making

Confidence reflects the extent to which consultation responses consistently supported a finding and the degree to which that finding is supported by available evidence. It does not indicate whether stakeholders are right or wrong, nor does it represent a quantitative measure of support.

Issue	Evidence base	Stakeholder perception	Analytical interpretation	Confidence
Trust in government	Strong consultation evidence	SHG does not listen to stakeholders and decisions may already be made.	Trust appears to be a cross-cutting issue influencing attitudes towards most fisheries policies. Rebuilding trust may be a prerequisite for successful implementation of other measures.	High
Trust in fisheries science	Scientific evidence underpins fisheries management and conservation measures.	Scientific advice does not always reflect local experience.	Concerns appear to relate more to confidence in scientific processes and communication than to science itself.	High
Institutions and leadership	Repeated references of respondents to accountability, leadership and transparency.	Existing arrangements are fragmented or ineffective.	Institutional reform attracted broader consensus than any individual operational or commercial proposal.	High
Consultation and engagement	Strong evidence from responses.	Stakeholder views are not always reflected in decision-making.	Future policy development is likely to benefit from more transparent and inclusive engagement mechanisms.	High
Industry economics	Recurrent concerns regarding the profitability of export.	Economic returns are insufficient to sustain growth and attract investment.	Economic viability appears to underpin many other issues including recruitment, investment and succession planning.	High
Fish processing plant performance	Limited publicly available operational information.	The processing plant is not achieving its full potential.	Concerns may reflect operational challenges and lower performance than anticipated by SHG.	Medium
Fish processing plant capacity	Some concerns about operational practice, plant configuration, fish	Existing facilities limit development.	Evidence is uncertain. Further operational assessment is	Medium

	acceptance policies and commercial arrangements		required before concluding that capacity is an issue.	
Fish acceptance practices at the plant	Limited objective evidence presented during consultation.	Fish are rejected unnecessarily or inconsistently.	Concerns appear linked to trust, communication and transparency regarding quality requirements.	Medium
Local cold storage infrastructure outside of the plant.	Frequently referenced infrastructure requirement.	Storage limitations restrict industry flexibility.	Improvements could support multiple development pathways irrespective of wider strategic choices.	Medium-High
Ice production capacity outside of the plant.	Recurring issue identified by stakeholders.	Current arrangements constrain fishing operations and quality management.	Infrastructure improvements appear relatively low-risk and widely supported.	Medium-High
Landing infrastructure outside of the plant.	Strongly recurring theme.	Existing facilities limit efficiency and growth potential.	Harbour-side infrastructure is viewed as a foundational requirement regardless of future industry direction.	High
Export readiness	Certification, logistics and market access issues identified.	The island is not fully prepared for export expansion.	Export growth may depend as much on supporting infrastructure and systems as on catching or processing capacity.	Medium
Export-led development	Limited evidence on future export market growth opportunities (especially as the global market is affected by geo-political challenges). Consultation evidence does not support prioritising export at this stage, although it could remain available for consideration should future evidence demonstrate commercial viability	Exports are either essential to growth or detrimental to local supply.	Stakeholder disagreement appears to reflect differing priorities rather than conflicting evidence.	Low-Medium
Local fish supply	Strong and consistent consultation evidence.	Insufficient fish is available locally (this could be currently	Local supply is valued for social and community reasons	High

		attributable to the current green water/ off season and the absence of grouper).	as well as commercial reasons.	
Food security	Frequently linked to local fish availability.	The community should have greater access to local fish.	Food security may represent one of the strongest areas of common ground among stakeholders.	High
Workforce ageing	Consistently raised by respondents.	The industry has an ageing workforce.	People planning will be important irrespective of wider policy choices.	High
New entrants to commercial fishing and apprenticeships	Broad support across respondents.	More young people should enter the sector.	Recruitment initiatives alone may be insufficient unless economic prospects also improve.	High
One-by-one fishing methods	One-by-one fishing strongly associated with local fishing identity.	One-by-one fishing is environmentally and culturally important.	Support reflects environmental, quality and cultural values, not solely economic considerations.	High
Local TACs and vessel quotas	Existing management framework in place.	Restrictions may limit opportunity and growth.	Debate reflects differing views on balancing conservation and economic development.	Medium
MPA	Strong support evident in responses.	Environmental protections should be maintained.	Conservation appears to be one of the least contested areas of fisheries policy.	High
Offshore no-take area	Mixed levels of understanding and support.	Potential benefits are uncertain.	Assurance/ evidence required to demonstrate in-shore fishing would not be affected.	Medium
ICCAT membership	Provides the framework for international fisheries management.	Membership remains important to the sector.	Little evidence of support for withdrawal from international management arrangements.	High
Diesel subsidies	Limited specific discussion.	Rising costs threaten profitability.	Cost pressures appear to contribute to wider concerns regarding industry viability.	Medium
Future ownership of processing infrastructure	Multiple ownership models discussed.	Current arrangements may not be delivering desired outcomes.	Stakeholders appear more concerned about accountability and outcomes than ownership structure itself.	Low-Medium

Future role of STC	Widely discussed throughout responses.	Concern regarding the effectiveness of existing arrangements.	Debate centres on trust, transparency and performance rather than institutional form alone.	Medium
Fisheries data and transparency	Information gaps frequently identified.	Decisions are made without sufficient evidence being publicly available.	Improved data transparency could reduce disagreement and strengthen confidence in future decisions.	High
Future of the industry	Broad agreement on outcomes but differing opinions on delivery.	Uncertainty regarding the most appropriate development pathway.	Stakeholders generally agree on objectives such as sustainability, viability and local benefit, but differ on the best means of achieving them.	Medium-high

4.4 Section conclusion

The consultation does not identify a single preferred future model for the fishing industry. However, it demonstrates broad consensus regarding the need to improve local fish supply, strengthen governance, rebuild trust, invest in infrastructure and improve the evidence base supporting future decisions.

5 OVERALL CONCLUSION AND NEXT STEPS

5.1 What we heard versus what the evidence says

Topic	Stakeholder view	Evidence position
Exports	Mixed views	Commercial viability remains uncertain
TACs	Differing opinions	Scientific evidence remains limited
Informal market	Strong support	Food safety concerns remain
Infrastructure	Strong support	Evidence broadly supports investment

Symptom	Possible root cause
Lack of trust	Perceived and/ or weak communication and transparency by SHG.
Inconsistency in the supply of fish on the local market	Limited local infrastructure outside the fish processing plant; labour shortage and weak economic incentives, especially for larger local commercial vessels not fishing for the plant.
Uneven operations at the fish processing plant	Commercial uncertainty – export and local.
Conflict between stakeholders	Lack of agreement on how to reach the shared outcome of a sustainable fishery contributing to economic development.
Resistance to change	Historic institutional relationships (going as far back as the 1970's, see the FRSA)

5.2 Outcome = agreement; mechanisms = less agreement

Perhaps the most significant finding from the consultation is that stakeholders appear to agree more on the outcomes they wish to achieve than on the mechanisms required to achieve them. Sustainable fisheries, economic viability, local benefit, environmental stewardship and future opportunities for young people were widely supported objectives.

Consultation findings indicate that institutional relationships are likely to influence future success as strongly as infrastructure investment. The challenge for future policy is therefore not defining the destination, but building sufficient trust, evidence and consensus to determine the most appropriate route to reach it.

These findings will inform the finalisation of FOP, and the recommendations of the steering committee for future policy.