

A survey to illuminate Fiji's domestic fish trade

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Background

In the past several decades, Fiji's major urban areas have expanded considerably, both in physical size and in population numbers. This enlargement has usually been accompanied by a depletion of coastal fishery resources close to the cities, and fish for urban residents has to be sourced from new areas. Entrepreneurs have seen opportunities for transporting fish from underexploited fishing grounds to major population centres, especially Suva, and a significant domestic fish trade has developed. An understanding of this trade is important for fisheries development and management purposes. In addition, an important aspect of food security in the country is the need for a good understanding of the domestic fish trade and its associated vulnerabilities.

A study on Fiji's domestic fish trade,³ summarised here, was supported by a grant from the David and Lucile Packard Foundation. It was carried in early 2019 and involved work in the greater Suva area, with excursions to Vanua Levu (Labasa, Nabouwalu, Savusavu), Kadavu (Vunisea), and around Viti Levu (Navua, Sigatoka, Nadi, Namaka, Lautoka, Ba, Tavua, Rakiraki, Korovou, Nausori). A large number of people contributed information to the study, including people at the Ministry of Fisheries, shipping companies, fish vendors, non-governmental organisations, seafood and transport firms, ice-plant operators, universities, and fisher associations. Altogether 87 individuals were contacted during the study.

Very little data on Fiji's domestic fish trade are available. Although the fish market survey conducted by the Ministry of Fisheries could conceivably be used for a study of domestic fish marketing, past budgetary cutbacks have meant that data have not been available for several years. Given the paucity of data, the methodology of the present survey relied heavily on discussions with stakeholders in the trade, and as a result, has many of the limitations associated with relying on anecdotal information. It is recognised that there are incentives for some stakeholders, especially the major private sector players in the fish trade, to give incorrect information. This deficiency was partly mitigated in the following ways:

- A large number of individuals were interviewed. When gathering information on important aspects of the study, replies from multiple people were considered, with more weight given to statements by people who do not have reasons to misreport.

- Experienced officers of the Ministry of Fisheries (20 contributed to this survey) were able to provide non-biased assessments on many subjects.
- The two authors of this report have a combined involvement in Fiji fisheries spanning 50 years, and are quite familiar with many of the individuals and most of the issues involved. This enabled the authors to ask questions for which they knew very well the answers, enabling the relative credibility of respondents to be established.

Despite the above efforts to compensate for the use of much anecdotal data in this study, the fact remains that the scarcity of good data on Fiji's fish trade means that results of the study should be considered indicative, rather than accurate.

Results

Because it is generally recognised that much of the fish sold in Suva's urban region comes from the north coast of Vanua Levu, the survey was initially focused on that area.

The survey revealed that fish marketing in Labasa and other places on the north coast of Vanua Levu is characterised by: a) fish production that is many times greater than the absorptive capacity of the local markets, and b) the presence of few resorts or up-market restaurants in the area, which means that premium prices for high-value species can only be obtained elsewhere.

Estimates obtained from knowledgeable individuals (fish vendors, middlemen) indicate that from 70% to 90% of the fish caught in the area is sent to the greater Suva area, with a small amount going to Nadi for air export.

Because almost all of the Labasa-Suva fish trade is carried by trucks travelling on the Nabouwalu to Natovi ferry, the number of fish-carrying trucks each week on those ferries can be used to estimate the flow of fish. During the present survey, two students studying fisheries at Fiji National University were employed to count fish trucks waiting to board the Nabouwalu–Natovi ferry. In summary, that sampling – together with some speculation on the dynamics of the fish trade – suggests that the amount of fish shipped on the Nabouwalu–Natovi ferry is somewhere around 5000 tonnes per year.

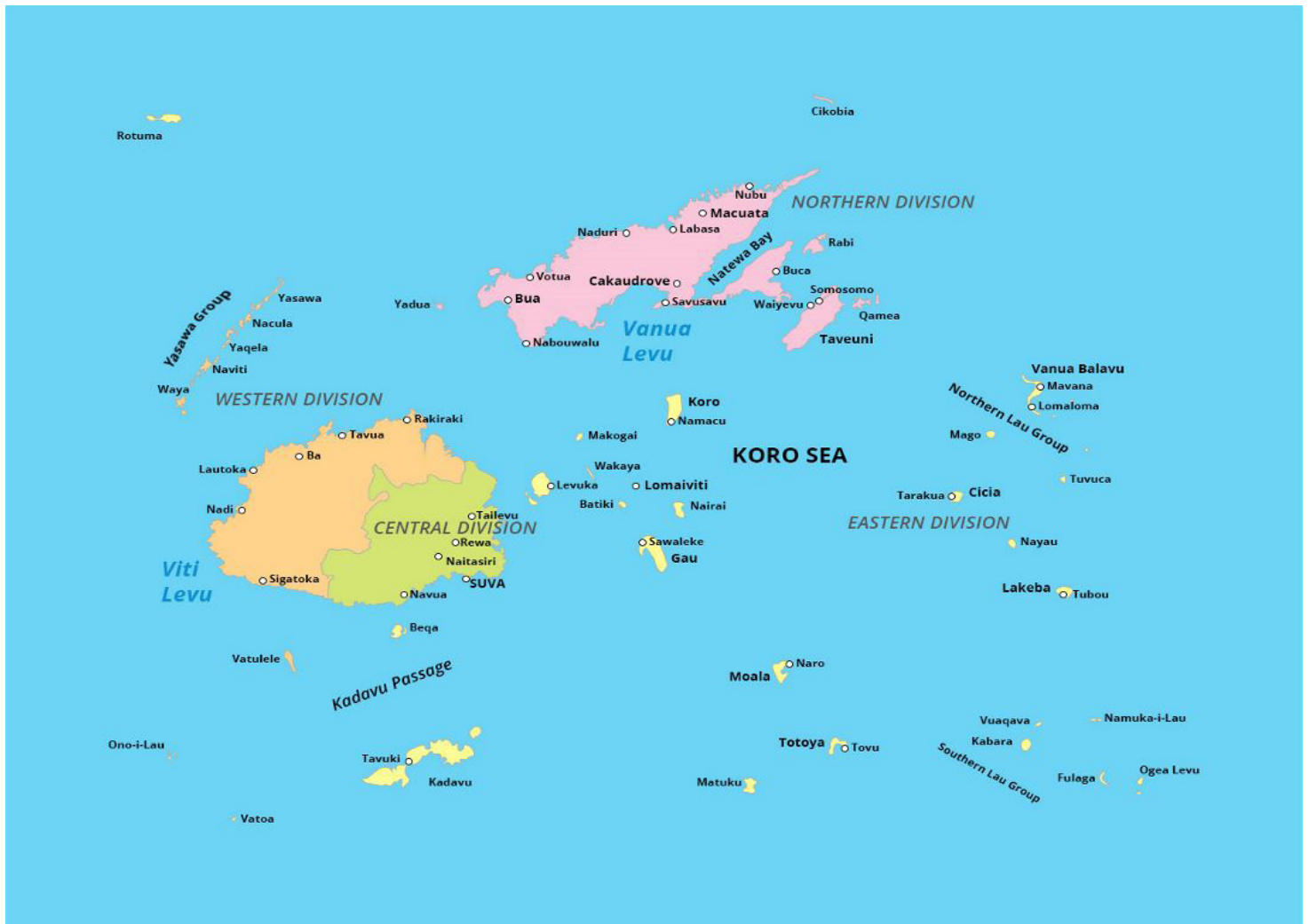
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³ Gillett R. and Musadroka K. 2019. Aspects of Fiji's domestic fish trade. Gillett, Preston and Associates for the David and Lucille Packard Foundation. 30 p.



Trucks (some of which are carrying fish) waiting in the Nabouwalu queue to board the ferry to Natovi on Viti Levu. (Images: Robert Gillett)



Fiji, showing the four geographic divisions covered by the survey. The Natovi ferry landing is located close to Taillevu.

The other results of the survey can be summarised as follows.

Western Division	The major flow of fish in the Western Division is from Ba (and to a lesser extent Tavua and Rakiraki) to markets in Lautoka, Namaka, Nadi and Sigatoka. This represents a movement of fish from areas with excess labour and low-income farm consumers to areas where there is much cash employment and tourism. Another major feature of the fish trade is that fishers who fish near resorts (or pass close to them while transiting from the fishing areas) will use the opportunity to sell as much fish at premium prices to the resorts, before proceeding to sell the remaining fish at lower prices at landing sites and markets. Only a very small amount of fish is sent from the Western Division to Suva.
Eastern Division	The Eastern Division is characterised by a small population, lack of sites where significant amounts of fish are marketed, poorly developed transport to Suva, relatively low exploitation of coastal fishery resources, and (with the exception of Kadavu) few resorts. Lomaiviti, Kadavu and Lau send small quantities of fish to Suva, but estimating the amounts is difficult.
Central Division	The main feature of the Central Division with respect to the national fish trade is that the markets of the Suva area serve as a destination for almost all the fish exported from the Northern and Eastern divisions – but only a small amount from the Western Division. By far the largest source of fish sold in Suva is northern Vanua Levu. A significant amount of fish comes from teams of divers based in Nabukalou Creek, Bailey Bridge, and villages north of Korovou that make multiday trips to places as far away as Vatulele and Vanua Levu.
Major Suva area fish markets	The main fish markets in the greater Suva area are Nabukalou Creek, Baily Bridge, Laqere and Nausori, and many smaller sites. There is a complex web of fish marketing arrangements in Suva (e.g. markets, fish shops, roadside sales, restaurants), and almost no data are available for any of the components.
Coastal fish exports	Data from the Fiji Customs and Revenue Service show that in 2016 and 2017, Fiji's exports of coastal fish amounted to 434 tonnes and 451 tonnes, respectively. Chilled fish are exported by air from Nadi, while frozen whole fish and fillets are exported mainly by sea from Suva.
Fiji's offshore catch in the domestic fish trade	For 2017, 17,149 tonnes of tuna and other species were landed by longline vessels, of which 13,852 tonnes of tuna were processed and exported, while 3297 tonnes were sold locally. Currently, areas as far from the Suva longline bases as Savusavu and the resorts in the Western Division purchase longline bycatch.

In summary, the short period of the survey was inadequate for making good estimates of some of the major flows of fish in the country, but it allowed some educated guesses.

- Longline exports: 14,000 tonnes
- Longline bycatch sold domestically: 3700 tonnes
- Labasa to Suva: 5000 tonnes
- Ba to urban areas and resorts in the west: unknown but probably large
- Areas of the Central Division to the greater Suva area: a crude guess is about 500 tonnes
- Coastal fishery exports: 450 tonnes

The most surprising result of the survey was the huge size of the Labasa–Suva fish trade, which is close to the most recent estimate by the Ministry of Fisheries of all coastal commercial fish production in the entire country. Other remarkable findings were the large degree to which: a) the region around Ba town supplies fish to the major urban and tourist areas of the Western Division, and b) some of the major commercial traders understate the volume of fish in some of the major fish flows in the country.

A complete report of the survey is available from the principal author at: gillett@connect.com.fj