

Fish value chain for Inland fisheries

- Need for a re-focus on inland capture fisheries. Data and information on inland fisheries in Africa is lacking, incomplete or contradictory. In general the research capacity is low and data collection/ catch statistics is variable.
- Nominal catch statistics affect the understanding of the role and contribution of inland capture fisheries (in terms of employment, income, food security)
- A recent report from FAO (2012) : *an audit of inland capture fishery statistics – Africa FAO fisheries and aquaculture circular no. 1051* shows that production has been more or less stable till 1990, when the fish production was raised by the development of the Nile perch and Dagaa fishery in Lake Victoria, which now represents about 40% of the continental inland fish production.

Need to safeguard the contribution and interests of the sector by :

- **reduction of postharvest losses**
- **improved distribution and marketing of fish to domestic markets**
- **improved governance of the fisheries sector, the various value chains as well as institutional support and enforcement capacity.**
- **Improved ‘visibility ‘ of the role and contribution of the fisheries sector in national and regional development strategies .**

Reduction of postharvest losses

- Currently due to the limited know how and lack of processing facilities, most fish production systems especially at small scale level, are constrained by poor hygiene and handling leading to high level of postharvest losses.
- There is a large demand and scope for dried and smoked fish in rural areas, where electricity is still absent. Processing technologies are well known, cheap and can be applied at family / community level.
- There is an increasing demand for fish meal by the animal husbandry sector.
- Lack of ice on board of small vessels / collection boats and the absence of cold stores at the landing sites and throughout the value chain, reduce considerably the shelf life, quality and consequently the marketability of fish.
- There is a growing demand for good quality fish in urban centres. Improved infrastructure and connectedness through telecommunications and internet and a growing mobility of people has led to increased fish market access and fish trade for domestic markets.

Demand and supply

- The picture for the per capita fish consumption in Africa from inland waters, shows a different trend when original data and back adjusted data are compared

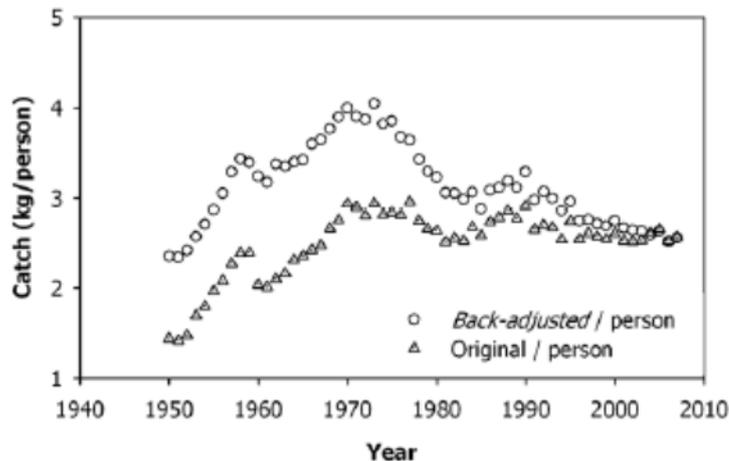


Figure 60. Historically modeled data of inland water capture fisheries catch/capita in Africa based on the changes identified using Criteria 2

- Africa is the only continent where fish export is growing and fish consumption is declining. Africa is also the continent where nutritional problems amongst the poor is very high.
- Besides poor quality, poor distribution and poor purchasing power, there are a number of other issues which prevent people from eating fish :
 - Lack of suitable preservation technologies
 - Unreliable transportation and supply networks
 - Lack of awareness on the nutritional value of fish
- Depending the cultural background of the population, there may be religious or cultural predisposition with respect to the consumption of fish or certain kind of fish. Lack of awareness on the nutritional value of fish (proteins, essential minerals , vitamins) for especially young children and mothers may prevent people from buying and eating fish. Sometimes the reason may simply be that people do not know how to prepare and preserve fish. Awareness campaigns among nomads which were not used to catch or eat fish proved to be alter their attitude when their women discovered that the consumption of fish considerably improved their eye sight and overall health conditions .

Fish trade

- Due to insufficient inspection services/ quality control systems both in-country and at the borders and the rather ambiguous contexts within traders operate, fish trade, though expanding, is still largely informal and of low value compared to the international fish trade.
- Fish trade forms a major source of food, employment and income. Trade has the capacity to increase prosperity in the fisheries sector, provided that an appropriate fisheries management system and equitable value chain organisation is in place. Trade can contribute to improved market access and better fish prices, which in turn can increase the profitability of fishing operations. On the other hand, trade can also have a distorting effect when high prices for fish result in illegal fishing practices or increased fishing effort, which in the longer term will reduce fish yields and the income and welfare of fishers and other stakeholders in the chain.
- All over Africa large informal networks of small economic operators perform a range of activities related to processing, marketing and trade. In many economies this role is dominated by women, who in this way support the livelihood of their families and food security of their clients.
- Reliable information on trade networks, ways of operation, trade barriers, transportation costs, financial gains & losses etc. is generally lacking. Actually the 'obscurity' and informal character of fish trade makes that it is poorly taken into account in national or regional trade policies.
- Given the increasing demand within the region and the growing importance of fish as an intra-regional trade commodity, there is urgent need for a comprehensive framework for formalization and facilitation of intra- regional fish trade, coupled with adequate measures to ensure minimum fish quality and safety. Efforts towards increased economic trade within the region ranks high on the agenda of sub-regional bodies including Common Market for East and Southern Africa (COMESA), East African Community (EAC), Intergovernmental Authority for Development (IGAD).
- *Fisheries and Aquaculture in Eastern Africa* published by the FAO Sub-regional Office for Eastern Africa (SFE) presented an overview of the sectors challenges and strategic priorities for development. One of the areas for priority action for assistance to the SFE member states is :

Support to fish marketing systems and supply chain and increase formal and quality intra-regional trade of fish and fish products among and from East African countries.

- status of formal and informal intra-regional fish trade and value/supply chain issues assessed and specific gaps identified in each country;
- technical and managerial capacity of the fish trade related sub-regional and national institutions and agencies strengthened;
- strategies and plans for value addition and marketing developed at national and sub-regional level;
- improved market access and marketing linkages facilitated in particular for small-scale producers, processors and traders;
- regional information system for trade data collection and dissemination supported;
- sub-regional forum for the development of common quality standards and certification system among the member countries established.