

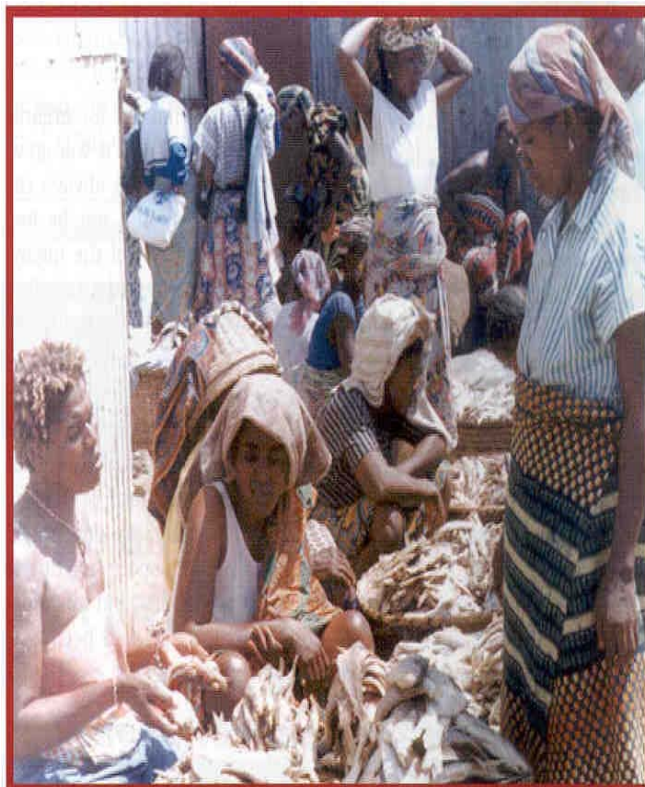
SMALL SCALE FISH TRADE IN WEST AFRICA PROSPECTS FOR EXPANSION

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Numerous constraints limit the expansion of the artisanal fishery sector of the West African countries. Wide-ranging improvements are needed to develop fish trade in the region and beyond.

The artisanal fisheries of West Africa spreading from Mauritania to Nigeria has developed from small sail canoes to a fleet of more diversified and motorised vessels. This development was facilitated by its access to modern equipment and gear through aid projects and national programmes.

The artisanal sector is an important source of employment, foreign exchange earnings and it consistently provides about 40 %of animal protein to the region's growing population. In 1995, the artisanal fleet landed 1.2 million mt, consisting mostly small pelagics (60%). About 1 million fishermen are employed in the sector that delivers to thousands of intermediaries. Women play a prominent role in the fisheries post harvest activities such as pro-cessing and marketing and they are major players in the socio-economic development of West African countries.



The average annual fish consumption according to FAO/IDAF(integrated Development of Artisanal Fisheries) was estimated at 9.2 kg per capita in 1995, below the world average of 13 kg in the same year and 15 kg in 1998. The low fish consumption can be attributed to fall in imports due to economic crises in the countries of the region, increased population growth and inefficient utilisation of fish catches.

In 1994 the quantity of fish imported into the Economic Community of West African States (ECOWAS) stood at 1.2 million mt and increased to approximately 1.7 million mt in 1998. Côte d'Ivoire, Ghana, Nigeria and Senegal, are the leading importer accounted for 85% of the total import. The 16 ECOWAS countries spent US\$363.36 million for imports in 1994 and US\$493million in 1998.

On the other hand, in 1994 seafood exports out of ECOWAS stood at 262 173 mt, and increased to 330 086 mt in 1998 valued at US\$628 million and US\$822million respectively. The four main exporters were Côte d'Ivoire, Ghana, Mauritania and Senegal.

Processing

The processing methods used were mainly traditional though improved technologies were being introduced and gradually adopted. The cured fish production sectors active in Western Africa. Except for a few semi-industrial operators engaged in fish smoking, drying and salting, fish curing is largely at artisanal level.

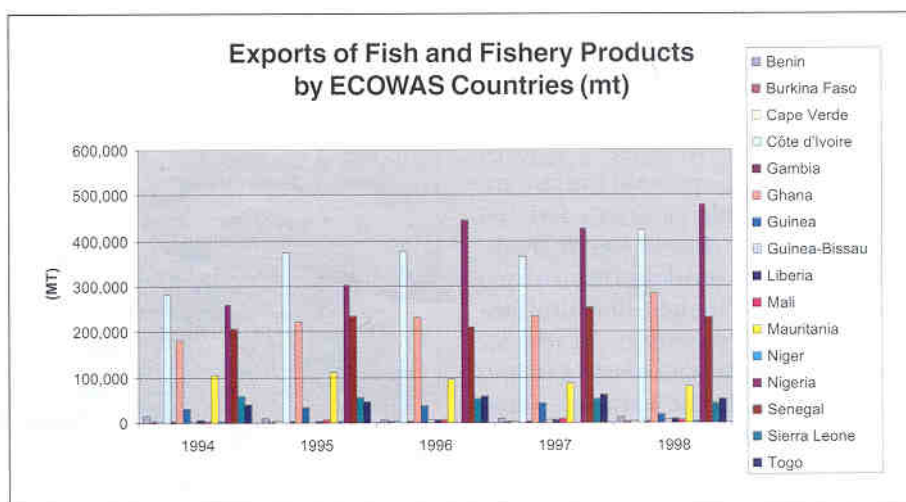
Different techniques of smoking fish are adopted which varies from country to country, based on tradition, preferred tastes and market preferences.

In general there are two main smoking techniques, hot-smoked and dried-smoked. The first is considered a superior technique than the second as the product has better market acceptance, but it contains some water and thus, it has a reduced shelf life compared to the dried-smoked fish. The main smoked products traded include *sardinella*, bonga, smoked or dried anchovy, catfish and tilapia. Other traditional forms of processing are sun-dried, dried-salted, fermented and fried.

Markets and trade channels

Artisanal catches are marketed fresh or processed according to consumer taste, storage conditions, and supply and demand. The lack of highly developed cold storage and marketing network makes fresh and frozen fish distribution to the inland population in most West African countries difficult. In many countries, cold storage systems are inadequate and fish are not sold the same day, which are either dried or smoked. Processed products from the artisanal sector form a significant part of the small pelagic fishery products, traded intra-regionally. This trade has increased considerably over the past years but its importance is still not recognised in trade data, since much of the activity is unrecorded.

INFOPÊCHE Missions Reports indicate that 70% of fish consumed in the region are smoked. Cured fish marketing has the most extensive distribution network in the region, particularly for smoked and dried products and to a lesser extent, sun-dried, dry-salted and fermented products.



Some of the main products traded intra-regionally are: smoked sardinella/anchovy, cured freshwater fish, *bonga*, skates, dried shark products, smoked/dried-salted marine fish and smoked catfish.

The distribution of artisanal products in the region involves several thousand traders, most of them women. While this activity may serve a social purpose, its primary objective is economic - to generate income.

The bulk of the cured fish products are transported by road, in lorries, pick-up trucks, passenger vehicles, taxis and motorcycles. The mode of transport depends on the distance, volume of load, costs and whether to the urban or rural areas. River transport is also very popular on Volta Lake and river Niger.

In Senegal, 36% of the artisanal fishery catches are processed, 1/3 is sold fresh on the domestic market, and another 1/3 goes for export to neighbouring Côte d'Ivoire, Ghana, Mali, Mauritania and Nigeria.

In Côte d'Ivoire 80% of the fish produced is smoked, especially sardinella, anchovies and *bonga*. In Benin, the bulk of fish sold is processed but increasing quantities of *bonga* are sold fresh. In general, the sale of fresh fish is getting popular due to better availability of ice, and better infrastructure that makes distribution to hinterland possible.

Trade is also growing among neighbouring countries due to the same reasons including improved trade co-operation between countries.



Fresh and frozen fish are generally exported to Europe, though some are also traded with-in the region, especially African mix and small pelagic fish. The lack of well-organised fishing fleets for frozen pelagic fish catch in African waters, makes countries such as Mauritania and Senegal less competitive with European exporters. The market for small pelagic in this region is estimated at about 800 000 mt.

The key west African markets for frozen small pelagic are Nigeria, Côte d'Ivoire, Zaire, Cameroon, Ghana, Togo and Congo. Despite the import of fish, Nigeria is still short of supply. Demand for fish in that country is estimated at 1.3 million mt whereas supply is at 0.5million Mt.



Frozen fish is often imported for processing by the artisanal fishery. High value fish such as sole, barracuda, snappers etc are exported to Europe and in return mackerel, sardines and mixed fish are imported from EU countries, Russia, South America, Ireland, Mauritania Angola, Namibia and Senegal.

Mainly the urban and rural poor in the fresh and smoked or dried form consumes the imported fish. The artisanal urban processors smoke the fish throughout the year while the artisanal rural processors smoke the fish during off-season for sardinella and *bonga*.

The leading African suppliers of these products are Mauritania, Senegal Namibia and Angola. Small pelagic such as sardinella, mackerel and horse mackerel are the most popular frozen fish traded. The most important criteria for quality are, fish size and their fat content. Mackerel should be at least 25-30 cm and fatty, white horse mackerel should be in the range of 20-25 cm with similar fat levels as mackerel.

Obstacles to trade

West Africa is confronted by serious problems throughout the entire stages of fish handling, processing, distribution and marketing. The following are some of the major constraints that affect intra-regional fish trade:

Infrastructure

The lack of infrastructure for handling, storage, processing facilities, distribution, transport facilities, inter-state roads and border controls, prohibit efficient distribution and trade.

Cargo vessels

Under the present situation, most of the cargo vessels plying the Morocco - South Africa route, come directly from Europe. If the vessels are full, it becomes a problem for Mauritania or other countries to ship their products to destinations in the Gulf of Guinea.

Information

Generally there is lack of market information for fishermen as they live in small isolated settlements along the shores of coastal and inland waters and rarely visited by extension officers.

This situation, coupled with high illiteracy amongst them, hampers their access to appropriate technology for fish preservation and processing, as well as access to information on resource and markets.

Political and civil unrest

Political and civil unrest including military coups and civil strife's in the countries of the West African sub-region affect fish trade. In most cases, when a military junta or a rebel group over-throws a government, existing trade arrangements are affected.

Economic situation

The economic situation in many countries of the region is alarming. The introduction of Structural Adjustment Programmes (SAP) in some countries in the 80's *e.g.* Ghana and Nigeria have adversely affected all sectors, of the economy including the artisanal fishery sector. The purchasing power especially of the rural poor is low. The lack of foreign exchange to import fishing inputs such as petrol, fishing gears, outboard engines, *etc* has resulted in low fish landings, leading to price increase beyond the reach of the poor. For example in Côte d'Ivoire, the devaluation of the CFA in 1994 resulted in a sharp drop in imports, from 170 141 mt in 1994 to 140 588 mt in 1997, despite the high rate of population growth, decrease in aquaculture production and national wild catch.

Many African countries find it difficult to pay for their imports as their currencies continue to depreciate and are not convertible.

Fish traders who want to expand or improve their operations find it difficult to obtain credit. On the one hand, access to credit is difficult and on the other, repayment conditions are often harsh. This is particularly true for the artisanal fish traders, the majority of who avoid formal credit channels.

National and Regional Policies

Virtually all the countries that make up ECOWAS have their own Fishery Policies and the ECOWAS fish trade policy. However, these policies are ineffective either due to sabotage, bureaucracy or lack of will power on the part of those responsible. An example is the ECOWAS initiative on streamlining fish trade policy in West Africa, which started in the 1970's, and still nothing concrete has developed on the ground.

Tariff and non tariff barriers

Corruption/malpractice

Checkpoints at borders between States are major obstacles to trade in the region, as traders and transporters are mostly illiterate and not able to fulfil requirements by custom officers, health officers and policemen. In such cases corruption prevails.

Some transporters, to avoid such checkpoints, took alternative routes and ended travelling more hours and faced other problems. All these incur cost, which are added to the price of fish sold in the region.

Quality assurance

Health regulations and quality standards based on Hazard Analysis Critical Control Point (HACCP) for seafood have been adopted in developed countries, and are in the process of being implemented in many other countries, including the African ones. For example, imports of fishery products into the EU and the US must have an original health certificate from approved establishments and bear the name of the country of origin. Some countries have been certified *e.g.* Mauritania, Senegal, The Gambia, Côte d'Ivoire, Ghana and Nigeria, while others have to upgrade plants and improve their inspection skills, to ensure the quality of product is acceptable.

Taxes and import duties

Efforts were being made by a number of regional and sub-regional organisations to identify common trade policy for the irrespective member countries but, so far, very little has been achieved. However, member countries failed to enforce the regional trade initiative rules.

In the year 2000 an important political/trade measure was taken to improve fish trade by the eight member countries of the Economic and Monetary Union of the West African States (UEMOA) (Senegal, Guinea Bissau, Mali, Burkina Faso, Niger, Togo, Benin and Côte d'Ivoire) to impose zero tariff on fishery products produced within the region.

Another effort by ECOWAS, to streamline fish trade policy in West Africa introduced a common duty and tax schedule in 1979 but Member States failed to incorporate these special provisions, preferring to apply their own regulations. Under the stipulated common policy, non-tariff barriers were to be removed within 4 years from May 1981.

Both UEMOA and ECOWAS had decided that the import duties and taxes and indirect internal taxes and duties be reduced and eliminated or harmonised in conformity to the provisions of their treaty. However, the Economic pressures in the individual Member States made it impossible to put the new policy into effect.

Furthermore, Central African countries import substantial volumes of frozen and cured fish from West Africa. However, products originating from the West African region do not benefit from the special tax concessions applicable in Central African States Union for Customs (UDEAC) member states, making the impact less effective.

Lack of harmonisation and enforcement in regional trade policies, sanitary regulations in African States, corruption, and harassment at checkpoints continue to hamper the development of intra-regional fishery trade.

Improvements needed for better trade

Wide-ranging improvements in the artisanal sector are vital for the improvement of fish trade in West Africa. Infrastructure on board, landing sites, roads and communication network, processing and trading establishments, fish inspection services are vital prerequisites for the production of good quality and safe fish products for trade. A trade information network on responsible fishing, resources, appropriate technology, products in demand and their markets, and rules and regulations are necessary for good market access.

The statistical database on West African artisanal fisheries is weak and should be improved. Awareness, education, training, and information on the socio-economic importance of the sector will help improve and strengthen livelihood in the sector, with better performance.

Regional co-operation and integration offer tremendous opportunities for economic growth and would enable participating countries to a bigger market rather than a small domestic market and provide opportunities for integrating African economies into the global economy.

In the same vein, there is also a need for a monetary co-operation programme, which shall involve a collective measure to set up a harmonised monetary system and common management institution.

Recommendations

Artisanal fisheries without doubt are an important source of foreign exchange, employment and animal protein in the region. It has to be strengthened and the intra-regional trade has to be stimulated and increased by creating awareness of market opportunities in the region and develop trade channels and services to support market integration. It needs to be carried out in a sustainable manner. To do all these, the following measures may be considered.



- Market surveys should be undertaken for the artisanal fish products trade in the region to identify the needs and formulate an appropriate programme of assistance to improve regional trade.
- Buyer and seller meeting and seminars may be organised regularly on trade opportunities in the region to bring decision makers together and help increase business contacts.
- Strengthen regional trade information network to provide data on raw material, annual supply and demand as well as consumption patterns. INFOPÊCHE and West African Development for Artisanal Fisheries (WADAF) have been jointly publishing BONGA Flash, a bi-monthly magazine on fish trade and price trends in the region, which ceased publication due to lack of funds.
- A directory on exporters and imports of fish and fishery products from the region should be published, based on data collected from the market surveys and buyer and seller meetings.
- Implementation of liberal trade policies already formulated, such as the UEMOA TEC and the ECOWAS trade programme. Harmonise rules and regulations on packaging and labelling of goods. In fact, cured fish losses are high during transportation because of poor handling, packaging and mis-labelling.
- Develop product standards, quality assurance, and certification according to international requirements.
- Expand the role of existing trade information network such as INFOPÊCHE, to establish contacts and promote information flow among and marketing bodies and to link-up with other sub-regional institutions in Africa.
- Organise training programmes to improve the skills of national trade, promotion officials by utilising existing institutions available in the region.

