



COMHAFAT/ATLAFCO



## **WORKSHOP: Towards a better access to the regional and International market of fishery and aquaculture products**

March 10-11 2022, Abidjan - Côte d'Ivoire

## **BACKGROUND AND RATIONALE**

- 1.** Fishery and aquaculture products are among the most traded food products in the world.
- 2.** In 2018, 67 million tons of fish (live weight equivalent) were traded internationally, representing nearly 38% of the world's fish caught or farmed. In the same year, 221 states and territories reported fish trade activity. The total value of \$164 billion recorded in 2018 for fish exports was nearly by 11% of the value of agricultural products exports.
- 3.** From 1976 to 2018, global exports of fish and other aquatic products grew at an annual rate by 8% in nominal terms and 4% in real terms. Available estimates for 2019 suggest that trade contracted by about 2 percent in volume and value from the previous year.
- 4.** In 2018, imports of fish and other aquatic products from developing countries accounted for 31% of the world total by value and 49% by volume (live weight).
- 5.** On the African continent, despite the increase in fish production in many countries, the regional supply of locally or regionally produced fish only meets less than half of the demand in the region. As a result, many African states are becoming increasingly dependent on imports, which may expose them to greater fluctuations and vulnerability to shocks and unexpected price increases in world markets.
- 6.** At the same time, external markets for fishery products are becoming increasingly difficult to access: hygiene and quality standards, increasingly expensive technologies, higher product transport costs, strong competition from Asian and South American countries. In addition to these constraints, there are the potential consequences of the liberalization of international trade led by the World Trade Organization (WTO) on the exports of developing coastal countries.
- 7.** Although there are still significant trade barriers, market access is not regulated solely by international agreements. Business-to-business relationships in supply chains are crucial to market access for potential exporters. Some key buyers, such as major brands and retailers, dominate supply chains in many sectors and provide the link between consumers and producers. Meeting their technical, quality, safety, and other requirements, whether set out in private specifications and contracts or formalized in international standards, is often crucial to securing market access.
- 8.** These challenges are, unfortunately, exacerbated by the impact of the coronavirus (COVID-19) outbreak, which has negatively affected trade between major exporters and importers in 2020.
- 9.** The organization of this workshop is part of this dynamic to contribute to a better access to the regional and international market of fishery and aquaculture products of the Member States of the Ministerial Conference on Fisheries Cooperation between African States bordering the Atlantic Ocean (ATLAFCO) and the Intergovernmental Organization for Marketing Information and Cooperation Services for Fishery Products in Africa (INFOPÊCHE).

## **I-OBJECTIVES OF THE WORKSHOP**

### **1.1 General Objective**

**10.** The overall objective of the workshop will be to develop competitive market-oriented for fishery and aquaculture products.

### **1.2 Specific Objectives**

**11.** Specifically, it will be a question of reinforcing the role and the importance of fishery and aquaculture products in the economic growth, through a better contribution to the trade balance and the balance of payments.

## **II EXPECTED WORKSHOP OUTCOMES**

**12.** The workshop should allow:

- To know the markets of fishery and aquaculture products;
- To adapt the offers to the requirements of the markets;
- To characterize the chains of value and to identify the tracks of fishery and aquaculture products valorization;
- To improve the services offered to the private sector (positive externalities, commercial facilities, promotion of exports, commercial information...);
- To develop public-private partnerships for research and development and a better valorization of fishery products;
- To develop marketing policies adapted to fishery and aquaculture products;
- To improve the competitiveness of fishery and aquaculture products.

## **III-WORKSHOP ORGANIZATION**

**13.** The methodological approach of the hybrid workshop was participatory, characterized by presentations and direct and open exchanges in plenary among the participants.

- Funding was provided by ATLAFCO.

## **IV. WORKSHOP PARTICIPANTS**

**14.** The workshop brought together representatives of institutions, regional and international organizations, civil society, experts and officials from the fisheries administrations of ATLAFCO and INFOPÊCHE Member States and any other resource person who contributed their expertise to achieve the objectives.

## INTRODUCTION

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15. ATLAFCO and INFOPÊCHE organized from 10<sup>th</sup> to 11<sup>th</sup> March 2022, in Abidjan (Côte d'Ivoire) a workshop in hybrid mode on the topic "***Towards a better access to the regional and international market of fishery and aquaculture products***".

16. The following representatives took part in this meeting:

**ATLAFCO and INFOPÊCHE member states:** Angola, Benin, Cameroon, Côte d'Ivoire, Gabon, Ghana, The Gambia, Guinea, Guinea Bissau, Morocco, Namibia, Nigeria, DR Congo, Sao Tome and Principe, Senegal, Sierra Leone and Togo

- **Ivorian structures involved in the trade of fishery products**

- The National Agricultural Development Support Laboratory (LANADA-LCHAI)
- The Free Trade Administration Committee (CARF/FTAC)
- The National Committee of the African Continental Free Trade Area (CN-ZLECAF/NC-ACFTA)
- The National Federation of Cooperative Societies of Côte d'Ivoire (FENASCOP-CI)
- The Directorate of Veterinary Services (DSV)
- The Directorate of Fisheries

**International Organization :** FAO

**Regional and Sub Regional Organizations:**

- UA-BIRA,
- ECOWAS,
- FCWC

**Civil Society :**

- The African Confederation of Artisanal Fisheries Organizations (CAOPA)
- The Media Observatory for Sustainable Fishing in Africa (OMPDA)

Experts and resource persons also took part in the workshop

***The list of attendances of the participants in Annex I.***

## WORKSHOP OPENING

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17. The opening ceremony chaired by Dr. Zoumanan Meïté-Anlyou, Director of Cabinet, representing the Minister of Animal Resources and Fisheries of the Republic of Côte d'Ivoire Mr. Sidi Tiémoko TOURE recorded three interventions.

18. Dr. SHEP Helguilè, Director of INFOPÊCHE justified that the topic of the workshop was chosen to sensitize the participants on the importance of intra-regional and inter-regional trade of fishery products, which deserves to be better quantified and assessed.

19. He also pointed out that the ecosystem of fisheries cooperation in our region is very dense and that trade of fishery products is a very dynamic sector, and a major provider of employment throughout our region, particularly in developing countries.

**20.** The Director of INFOPÊCHE also indicated that fish is a specific product whose marketing is subject to specific international standards (sanitary certificate, certificate for the fight against illegal fishing, eco-labeling, etc.). He also stressed the fact that unfortunately data on all intra-regional trade (volume and price) are lacking to better quantify the importance of this trade component. He ended his remarks by reminding the audience that INFOPÊCHE is a very strong political will of 18 African countries and that it is up to the technicians of these member countries to provide an inclusive and attractive content to attract resources.

**21.** In his intervention, Mr. BENABBOU, Executive Secretary of ATLAFCO thanked the participants and Côte d'Ivoire for its availability to support the ATLAFCO secretariat in its capacity as Chairman of the Governing Council. He reiterated his commitment to support INFOPÊCHE and to be involved in the coordination of the activities of the Regional Fisheries Organizations in the ATLAFCO area.

**22.** Dr. Zoumanan Meïté-Anlyou, Director of Ministerial Cabinet, representing the Minister of Livestock and Fishery Resources, first addressed the greetings from the Minister of Livestock and Fishery Resources, Mr. Sidi Tiémoko TOURÉ, to the participants and welcomed those who were able to be physically in Côte d'Ivoire, qualifying their presence as being the irrefutable proof of their attachment to the influence of the structures put in place for their very decisive role in the implementation of fishery and aquaculture policies

**23.** He then mentioned the deep crisis of functioning that INFOPÊCHE has been undergoing through for almost a decade. However, the organizational audit carried out by ECOWAS following the request of Côte d'Ivoire, showed the importance of INFOPÊCHE for our region. He also asked for the commitment of all member states to help this transitional phase to put the common institution on the right direction. He specified that to do so, Africa needs good statistics of its trade flows in order to make the right decisions in favor of the fisheries sector.

**24.** He also called for the development and facilitation of inter-African trade cooperation, including for fisheries products, especially with the advent of the African Continental Free Trade Area (ACFTA).

**25.** The Minister's representative expressed his warm congratulations to ATLAFCO which remains a great organ of cooperation in the region and which was willing to help INFOPÊCHE through the co-organization of this workshop. He then requested that a deep reflection be carried out for the effective participation of the member states in the animation of INFOPÊCHE's website.

#### **ADOPTION OF THE AGENDA**

**26.** The chairman presented the amended agenda to the participants, which was adopted unanimously. The agenda is attached as Annex 2.

## SESSION 1

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### **Presentation 1: Barriers to trade on fishery products in Africa.**

27. Professor ANOH Paul, Lecturer and Researcher in Geography at the University of Félix Houphouët Boigny, reminded the audience of the low level of contribution of Africa in the world fish trade and trade between African States.

28. Presenting the situation of trade between African states in West Africa, Professor ANOH mentioned the different products traded, the flow of fish, the volumes and values of trade as well as the cost of transport and customs taxes.

29. Barriers to the sustainable development of regional fish trade and some possible solutions were the last points addressed by Prof. ANOH Paul.

### **Presentation 2: The role of artisanal fishery in the international trade of fishery products: (case of Senegal)**

30. The presentation of the role of artisanal fishery in the international trade of fishery products: (case of Senegal) was made by Mr. Gaoussou GUEYE, President of the African Confederation of Artisanal Fisheries Organizations (CAOPA).

31. The current context of food and nutritional challenges was the first point addressed by Mr. GUEYE. He then insisted on the socio-economic importance of artisanal fishery in Africa. He also emphasized the importance of the trade of fishery products in the Senegalese economy. He also underlined the species, volumes and commercial values of fishery products exports between African states and other continents.

32. Mr. GUEYE went on to present the constraints to be removed in order to improve intra-African trade. The prospects for the establishment of an African market for fishery products were the last elements addressed during this presentation.

### **Presentation 3: « Prospects for improving fishery products trade in Africa through the AfCFTA»**

33. In her presentation, Mrs. BAMBA first recalled the various stages that led to the creation of the African Continental Free Trade Area (ACFTA) and the National Committee in Côte d'Ivoire.

34. She then mentioned the objectives assigned to the ACFTA, particularly with regard to goods and services. Mrs. BAMBA emphasized that the negotiations underway were in the second phase of the process. The content of the agreement was the third point addressed by the presenter.

35. In addition, the stakes for African people as well as the challenges to be met were presented. After the presentation of the perspectives, Mrs. BAMBA, to finish, declined the 2022 Strategic Action Plan of the NC-ACFTA.

## **DISCUSSIONS**

36. Following the presentations, needs for additional information were expressed and contributions were made by the participants. The discussions focused on: (i) product quality, (ii) financing needs, (iii) removal of barriers to inter-African trade, and (iv) supply to manufacturing plant.

## **SESSION 2:**

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### **Presentation 4: EU standards for fishery and aquaculture products: General principles of EU food law**

**37.** The first point addressed by Dr. TALL was the general principles of the EU food legislation. He described the interactions between the different regulations constituting this legislation, in particular Regulation (EC) N° 178/2002 on animal feed, Regulation (EC) N° 852/2004 on the hygiene of foodstuffs and Regulation (EC) N°882/2004 on official controls of animal feed and foodstuffs.

**38.** Thereafter, Dr. TALL described the general principles of the various regulations mentioned. Finally, the procedures of official controls based on the legislation in force as well as the structures involved were presented.

### **Presentation 5: Eco-labeling**

**39.** The definition of eco-labeling was the first point addressed by Dr. TALL. He also stressed the importance of practicing eco-labeling. The process of implementing eco-labeling was also described.

**40.** The structure of sustainability/eco-labeling standards was also brought to the workshop's attention. Dr. TALL then provided a comparative review of two standards, the African Eco-labeling Standards (AES) and the Marine Stewardship Council (MSC). The contribution of eco-labeling in achieving sustainability goals was noted by the presenter.

**41.** Any label claiming the ecolabel must be based on a recognized standard criterion and certified by a credible third party process. The statement of the beneficiaries of eco-labeling was the last point addressed by Dr. TALL

## **DISCUSSIONS**

**42.** The second panel discussion consisted of identifying the procedures for compliance with sanitary standards in the main importing markets for fishery products.

**43.** The framework of the discussions was circumscribed around the following questions:

- the existence of certification laboratories for fishery products ;
- the correlation between eco-labeling and sanitary standards
- the knowledge of the needs of the member states in terms of analysis and accreditation of laboratories;
- the inspection process of the Food and Veterinary Office (FVO);
- the right to healthy consumption.

### **Presentation 6: Survey of Member States on trade of fishery and aquaculture products**

**44.** The results of the survey of the Member States on trade of fishery and aquaculture products carried out by ATLAFCO were presented by Mr. Rachid REGRAGUI.

**45.** The first results presented were the production per country, the estimate of local consumption and the volumes exported per State. Concerning self-sufficiency in fish production, he indicated that the majority of countries did not meet their

needs, with the exception of the Gambia and Sao Tome and Principe. However, he noted that he did not have data on these States.

**46.** In addition, the existence or not of assistance programs, accreditation systems for exporting companies, and business-to-business supply chain mechanisms to facilitate access to exports in the various member states were also presented.

**47.** The measures taken by the Member States to limit the impact of the Covid 19 pandemic was also discussed. Mr. REGRAGUI also highlighted the different export markets per country and the fish processing activities concerned by these exports.

**48.** The existence of assistance laboratory necessary for self-monitoring and the difficulties for the realization of self-monitoring were the last results presented by Mr. REGRAGUI. He ended his presentation by noting the proposals for improvement that were made.

### **SESSION 3:**

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#### **Presentation 7: Value chain analysis of the main species exported by Morocco**

**49.** The presentation was made by Mr. Rachid REGRAGUI from ATLAFCO. He recalled the fishing potential of Morocco which remains the first Arab and African country in fishing and seafood; Morocco is also the first country producer and exporter of sardines in the world with more than 150 destination markets around the world.

**50.** The main chains analyzed concern fresh products, frozen products, canned products, semi-canned products and fish meal. For each of the chains, the process of validation of the finished product and the different difficulties involved are briefly recalled.

**51.** With regard to fish meal, Mr. Rachid emphasized the poor reputation of the product, which uses fresh raw materials instead of fish by-products and waste.

**52.** According to the speaker, the development of the fisheries sector is integrated into the economic and social policy of the kingdom through the strategy "Halieutis" whose main axes are (i) the sustainable exploitation, (ii) the development of an efficient fisheries and (iii) the development of competitiveness.

**53.** Mr. Rachid concluded his presentation by recalling some of the tangible results of the "Halieutis" plan which are characterized by:

- a significant reduction in the informal share of the sector's business volume
- the increase in the number of direct and indirect jobs in the sector
- an increase in export sales from 1.2 billion dollars in 2007 to 3.1 billion dollars in 2020.
- increase in per capita consumption from 12kg/capita in 2007 to 16kg/capita in 2020

#### **Presentation 8: The role of the Free Trade Administration Committee (CARF/FTAC)**

**54.** The circumstances that led the Ivorian legislator to establish the Free Enterprise Regime for the Processing of Fishery Products (REFTPH) were the first topic of the presentation made by Mr. N'DA Atché Hugues Pacôme, Assistant to the CARF/FTAC's Executive Secretariat.

**55.** He then recalled the objectives of this regime, notably to increase the competitiveness and profitability of local fish processing industries. He also presented the management body of this regime and recalled the conditions of eligibility to the said regime.

**56.** He also revealed the advantages granted to free trade enterprises. Presenting the results of the implementation of this regime, the presenter highlighted its contribution to the Ivorian economy.

**57.** He ended his presentation by inviting ATLAFCO and INFOPÊCHE to join forces with FTAC and ATUNA for the organization of a new African Tuna Conference after those of 2014 and 2016.

### **Presentation 9: Public policies to support exporting companies: role of the laboratory**

**58.** Dr AKÉ Assi Yolande DATTE, Head of the Central Laboratory for Food Hygiene and Agro-Industry, firstly situated the current context of the needs in terms of commercial exchange of fishery and aquaculture products.

**59.** She also mentioned the problem that Côte d'Ivoire must face if it wants to maintain its place on the world market, namely the alignment of detection methods of parameters used in the laboratory.

**60.** Then, Dr AKÉ presented the regulatory bases of food hygiene in Côte d'Ivoire. The basics of controls were also recalled. Then, the presenter described the control mechanisms of the companies exporting fishery products in Côte d'Ivoire as well as the control structures operating there.

**61.** Dr. AKÉ concluded his remarks by revealing the challenges to be taken up by LANADA and the perspectives it has set for itself.

### **Presentation 10: Challenges and new perspectives of the tuna canning industries in Africa.**

**62.** This presentation was made by Mr. Richster Nil Amarh Amarfio, Director of LAIF Fisheries Company LTD and Secretary of the Ghana Tuna Association.

**63.** Mr. Richster noted in his introduction the socio-economic importance of tuna. Taking the case of Ghana, he recalled the role of the tuna fleets in the value chain.

**64.** The high production costs for the canneries, notably the cost of energy and the contestation of the maritime space by other industries were the main difficulties noted by Mr. Richster. He also presented the European Union market and its challenges.

**65.** He concluded his remarks by emphasizing the need to open up an African tuna market by taking advantage of the African Continental Free Trade Area (ACFTA)

## **DISCUSSIONS**

**66.** Following the presentations, needs for additional information were expressed and contributions were made by the participants. Discussions focused on: (i) the conformity of the results of the analysis and the certification of LANADA, (ii) the viability of the "Free Trade Regime" and the other support mechanisms for SMEs, (iii) the sharing of Moroccan experience in the field of aquaculture, (iv) the

establishment of a one-stop shop, (v) the realization of a diagnostic study of the sub-regional markets in the EU and Asia, and (vi) the establishment of a working group for the harmonizing sanitary standards.

#### **SESSION 4:**

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#### **Presentation 11: Status of tropical tuna stocks and future developments of the tuna industry.**

**67.** The different species targeted by the tuna fishery as well as the different catch levels by species and by gear were the first elements discussed by Dr. Goujon during his presentation. He then presented the stock status of the three species for the Atlantic Ocean only.

**68.** Turning to the marketing of processed products, he noted that trade liberalization and the advent of the Economic Partnership Agreements (EPAs) have considerably reduced the preference given to ACP producers of processed fish. Furthermore, he indicated that by-catches and spoiled tuna not accepted by the canneries feed a flourishing local economy in Abidjan based on fish trade networks mainly run by women.

**69.** The description of the challenges and the orientations to face them were the last points mentioned by Dr. GOUJON. The detailed summary of the presentation is enclosed in Annex III.

#### **Presentation 12: Importance of average species price databases in fisheries agreement negotiations**

**70.** In his presentation, Mr. DJOU Julien, Head of the Studies, Statistics and Documentation Department of the Fisheries Directorate, first recalled the definition of a database and its importance in a sector such as fisheries.

**71.** He then described the process leading to the concluding fishing agreements as well as the criticisms made of them. With regard to the parameters of the prices of the species in the fishing agreements, he indicated that it will be mainly a question, beyond the volume of transactions, of knowing the market price of the fishing products resulting from the agreements and analyzing its evolution over the years. Therefore, he stressed the need for the developing Countries to have a database on the trade of fishery products.

**72.** In order to do so, he identified four steps which are: (i) identify the information needs, (ii) collect this information, (iii) analyze this information and (iv) act on the basis of this analysis. In conclusion, Mr. DJOU invited all the stakeholders of the workshop to work together to better negotiate and defend our interests

#### **Presentation 13. Emerging markets in ECOWAS' Member Countries and Mauritania**

**73.** In her presentation, Mrs. Nelly ISYAGI of AU-IBAR showed the role and contribution of fisheries and aquaculture in Africa and particularly in the Economic Community of West African States (ECOWAS) and Mauritania.

#### **In terms of employment:**

**74** .7 to 8 million employed (fishermen, processors, wholesalers and fish traders).

And in terms of food and nutrition:

**75.** Small coastal pelagic species (notably sardinella, bonga shad and horse mackerel) are accessible to 40-50% of the populations in the ECOWAS zone, due to their abundance and low price and finally in terms of foreign exchange, industrial fishing and trade at the regional and international level.

Economic opportunities for women and youth:

**76.** 80% of those employed in the post-harvest sector (trade, processing, transport, distribution and retailing of fish) are women.

**77.** Mrs. Nelly ISYAGI, however, noted that the regional consumption of fish is on average 14 kg of fish/pc/year, with great disparities. This figure is lower than the world average which is 20 kg/pc/year. It also highlighted the problems that negatively impact the fish trade. These are: (i) inadequate production for a growing population demand; (ii) large amounts of post-catch losses, lower quality fish within countries, (iii) instability of fish supply (seasonality of production and inaccessibility of fishing sites) and (iv), climate change.

## **RECOMMENDATIONS**

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**78.** The workshop expressed its satisfaction with the quality of the presentations and exchanges during the two days. It expressed its sincere thanks to COMHAFAT for having accompanied INFOPÊCHE in order to contribute to the definition of means and methods of valorization of fishery and aquaculture products and to the resolution of the various constraints identified.

**79.** At the end of the meeting, the following recommendations were made:

### **To the Member States**

- Enforce existing national and/or harmonized health regulations on product quality and safety; support accreditation of national reference quality control laboratories and the application of international standards adopted by member states, including SPS;
- Promote intra-regional trade through awareness campaigns and capacity building on trade facilitation along trade corridors and joint customs controls, and remove illegal checkpoints;
- Ensure regular contributions from member countries to the INFOPÊCHE budget in order to facilitate the implementation of its missions; and
- Create an enabling environment for public-private partnership for the construction of roads along trade corridors and develop improved landing facilities.
- Facilitate collaboration between fisheries administrations and INFOPÊCHE

### **To INFOPÊCHE:**

- Develop a capacity building program for fish inspectors and marketing experts;
- Develop an awareness and capacity building program for non-state actors (e.g. women fish processors and traders) through a tailored program using language independent posters on the African Continental Free Trade Agreements (AfCFTA); and
- Conduct studies on fish trade in different INFOPÊCHE member countries, focusing on market segments, barriers and opportunities.

- Establish a mechanism for collecting trade data on fishery and aquaculture products from member states;
- To set up an information system on the texts governing the various export markets

## CLOSURE

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**80.** Following the formulation of the workshop's recommendations, the chairman, Dr. SHEP Helguilè, Director of INFOPÊCHE, gave the closing address.

**81.** He indicated that the various interventions and interactive debates highlighted that several preconditions as well as real commitments from all stakeholders are required, and will indeed constitute the key factors for the sustainable development of an African market for fishery and aquaculture products.

**82.** He also thanked all the participants for the work accomplished. While wishing a good return to the participants, he finally declared, on behalf of the Minister Sidi Tiémoko TOURÉ, the closing of the hybrid workshop on the topic "***Towards a better access to the regional and international market of fisheries and aquaculture products***".

## **ANNEX 1: ATTENDANCE LIST OF PARTICIPANTS**



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### **Towards a better access to the regional and international market of fishery and aquaculture products March 10-11 2022 – Abidjan, Côte d’Ivoire**

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## ANNEX 2: THE AGENDA OF THE WORKSHOP OF MARCH 10-11 -2022



**ATELIER SUR LE THEME : Vers un meilleur accès au marché régional et international des produits de la pêche et de l'aquaculture**

**Date : du 10 au 11 mars 2022**

**Lieu : Hôtel IVOTEL, Abidjan – Côte d'Ivoire**

### **AGENDA provisoire de l'atelier**

Heures	Thèmes	RESPONSABLES
<b>10.03.2022 Jour 1: Programme de l'Atelier</b>		
08.30 – 09.00	<b>Arrivée et enregistrement des participants/distribution des documents</b>	
09.00 – 09.45	<ul style="list-style-type: none"><li>• Allocution du Directeur d'INFOPECHE</li><li>• Allocution du Secrétaire Général de la COMHAFAT</li><li>• Allocution de Monsieur le Ministre des Ressources Animales et Halieutiques</li></ul>	
09.45 - 10.00	<b>Photo de groupe et pause-café</b>	
10: 00 - 10.20	Adoption de l'agenda et présentation des participants	
10:20 - 10.30	Session introductive de l'Atelier : Vers un meilleur accès au marché régional et international des produits de la pêche et de l'aquaculture	
10.30 - 11.00	<b>Thème 1</b> : Les obstacles au commerce des produits de la pêche en Afrique	Pr Anoh Paul
11.00 - 11.30	<b>Thème 2</b> : Perspectives d'amélioration du commerce des produits de pêche en Afrique à travers la ZLECAF	Mme le Secrétaire de ZLECAF
11.30 - 12-00	<b>Thème 3</b> : Contribution des pays de la COMHAFAT au commerce mondial des produits de pêche	M. Pape Ngora Ndiaye
12.00 - 12.30	Échanges et discussions sur les thèmes 1, 2 et 3	
12.30 - 13.30	<b>Pause-déjeuner</b>	
13.45- 14.15	<b>Thème 4</b> : Revue comparée des normes sanitaires des principaux marchés importateurs des produits de la pêche (UE, USA, JAPON)	Dr Amadou TALL
14.15 - 14.30	<b>Thème 5</b> : Éco-labélisation, amélioration des revenus des pêcheurs et gestion durable des pêches	Dr Amadou TALL

14.30 - 15.15	<b>Thème 6</b> : Le rôle de la pêche artisanale dans le commerce international des produits de pêche : (Cas du Sénégal)	M. Gaoussou GUEYE
15.15 - 15.45	Échanges et discussion sur les thèmes 4, 5 et 6	
15.45 - 16.30	<b>Pause - Café</b>	
16.30 - 16.50	<b>Thème 7</b> : Les tendances des produits de la pêche et de l'aquaculture au niveau régional et international  Principaux résultats des analyses des chaînes de valeur dans le cadre du projet Fish4ACP	Dr Ndiaga Gueye (FAO) Virtuelle
16.50 - 17.30	Échanges et discussions sur le thème 7 – Fin de la journée	

### 11.03.2022-Jour 2 : PROGRAMME

Heures	Thèmes	RESPONSABLES
09.00 - 9.20	<b>Thème 8</b> : Analyse des chaînes de valeur des principales espèces exportées par le Maroc	Expert marocain
09.20 - 09.45	Echanges et discussion sur le thème 8	
09.45 - 10.15	<b>Pause - Café</b>	
10.15 -10.35	<b>Thème 9</b> : Le rôle du Comité d'Administration du Régime Franc (CARF) : Cas de la Côte d'Ivoire	CARF
10.35 - 10.55	<b>Thème 10</b> : Les politiques publiques d'accompagnement des entreprises exportatrices : Rôle du laboratoire	Dr Aké Yolande
10.55 - 11.15	<b>Thème 11</b> : Enjeux et nouvelles perspectives pour l'industrie de la conserve de thon en Afrique	Amarfio Richster Niiamarh
11.15 - 12.00	Echanges et discussions sur les thèmes 9, 10 et 11	
12.00 - 14.00	<b>Pause déjeuner</b>	
14.00 - 14.20	<b>Thème12</b> : Etat des stocks de thonidés tropicaux et développements futurs de l'industrie thonière	Dr Michel Goujon (Virtuelle)
14.20 - 14.40	<b>Thème13</b> : Importance des bases de données des prix moyens des espèces dans les négociations des accords de pêches	Djou Julien
14.40 -15.10	<b>Thème 14</b> : Les marchés émergents dans les pays de la CEDEAO et Mauritanie	UA-BIRA
15.10 -15.30	<b>Pause - Café</b>	
15.30 - 16.00	Échanges et discussions sur les thèmes 12, 13 et 14	
16.00 - 17.00	Rédaction, lecture, et validation du rapport de l'atelier et clôture des travaux.	

### **ANNEX III. THE DETAILED SUMMARY OF THE PRESENTATION OF DR GOUJON.**

#### **I.Characteristics and catches (INFOPÊCHE)**

The main species of tuna targeted by the tuna industry are:

- Skipjack (*Katsuwonus pelmanis*)
- Yellowfin tuna (*Thunnus albacares*)
- Bigeye tuna (*Thunnus obesus*)

The biological characteristics of these three species (size at first sexual maturity, age at sexual maturity, maximum size and maximum life expectancy) are presented as follows:

Species	First maturity Size	Age of sexual maturity	maximum Size	Maximum life expectancy
skipjack	43 cm	1-1,5 year	108 cm	6-10 years
Yellowfin tuna	85-108 cm	2-3 years	205 cm	8 years
Bigeye tuna	102-135 cm	3-4 years	230 cm	15 years

Five (05) gears target the species: seine, longline, pole and line, hand and trolling, and gillnets. The contribution of each gear to the world tuna production in all three oceans is composed as follows: (i) Longline 368,000 t; (ii) Seine 3,300,000 t mainly under floating objects called fish aggregating devices FADs; (iii) Rod 386,000 t; (iv) Lines 612,000 t; (v) Gillnets 172 t, mainly in the Indian Ocean The use of purse seine with satellite buoys is a major threat to the sustainability of the stocks in the three oceans with an excessive catch of juvenile tunas.

The contribution by gear of the different species is as follows

Gears	Skipjack	Yellowfin tuna	Bigeye tuna	Total catches (tons)
Seine	68%	26%	6%	3,300,000
Longline	0,1%	52%	48%	368,000
Pole and line	78%	19%	3%	386,000
Hand and trolling	50%	43%	7%	612,000
Gillnets	58%	42%	0%	172

The different stocks are managed by five tuna RFMOs, namely the International Commission for the Conservation of Atlantic Tunas (ICCAT) for the Atlantic Ocean, the Indian Ocean Tuna Commission (IOTC), the Inter-American Tropical Tuna Commission (IATTC) for the Pacific Ocean, the Western and Central Pacific Fisheries Commission (WCPFC) and the Commission for the Conservation of Southern Bluefin Tuna (CCSBT)

## **II. Status of tuna stocks**

The status of the stocks of the three species is done only for the Atlantic Ocean and is as follows

### ✓ Skipjack.

The maximum sustainable yield (MSY) of the stock is 170,000 tons which contrasts with the recent rather high catches (282,427 tons of catch in 2018). The increase in fishing effort under floating objects (FADs) is a major threat to the stock. Some provisions of ICCAT Recommendation 19-02 apply to the management of the stock, including limiting the number of purse seine vessels using FADs, limiting the number of FADs to 300 per vessel and prohibiting fishing under FADs from January 1 to March 13).

### ✓ Yellowfin tuna

The maximum sustainable yield of 120,000 t per year would maintain the yellowfin tuna stock in good condition until 2033 and ICCAT has set a total allowable catch (TAC) of 110,000 t.

Recent catches of yellowfin tuna are relatively large. Indeed, the catches landed in 2018 by all vessels amounted to 135,689 tons and are thus above the MSY and TAC. The three fish are cosmopolitan and live together therefore the skipjack management measures apply to yellowfin tuna.

### ✓ Bigeye tuna

Bigeye tuna is a quota fish for all countries targeting this species. A TAC of 61,500 t has been set in 2019. The Scientific Committee on Research and Statistics (SCRS) recommends maintaining a TAC and states that it is too early to know if the measures adopted have reduced the mortality of juveniles and increased the long-term sustainable production of the stock.

## **III. The tuna canning industry**

More than 300,000 tons of Atlantic tuna are destined for canning. Canned tuna destined for the European Union comes mainly from the canneries of Abidjan (Côte d'Ivoire), Tema (Ghana) and Dakar (Senegal). Half of the catches of EU vessels are taken in the EEZs of coastal States through Fisheries Partnership Agreements or private agreements.

In the past, preferential access to EU markets for fish and fishery products from ACP countries, particularly African countries, was a fundamental and important competitive advantage granted to this group of countries. However, with trade liberalization and the advent of the EPAs, the preference given to ACP producers of processed fish has been significantly reduced

## **IV. The fake tuna industry**

European Union vessels land more than 20,000 t in Abidjan of by-catch and spoiled tuna that are not accepted by the canneries.

These fake fish feed a flourishing local economy based on fish-trading networks mainly run by women.

## **V. Management issues**

The management issues focus on (i) conservation measures through VMS and the embarkation of observers, (ii) the strengthening of the fight against IUU fishing, (iii) the responsible management of FADs, (iv) the improvement of the quality of services in the ports of landing, (v) the safety of the vessel and the crew and (vi) the certification of the catches.

## **VI. Guidelines for dealing with it**

The guidelines to ensure good management of tuna fisheries are based on four pillars.

### **Pillar 1: transparency**

- Boarding of scientific observers from third countries
- Alternatively, use of cameras for on-board operations
- Promotion of fair fishing agreements

### **Pillar 2: Promote compliance with the rules guaranteeing sustainability**

- Incentive for the management of FADs within the RFMOs
- Rigorous management of quotas
- Participation in FIPs and fisheries certifications

### **Pillar 3: Continuously improve fishing practices**

- Limiting the number of FADs
- Migration to environmentally friendly FADs
- Safe release of sensitive species
- Selection of schools before fishing
- Elimination of discards

### **Pillar 4: Modernize the fleet**

- Cold/freezing management
- Optimization of energy consumption
- Satellite communication
- Improving working and living conditions on board