AFRICAN UNION
INTERAFRICAN BUREAU FOR ANIMAL RESOURCES

The sector situation of marine fisheries in the Member States in the context of Covid-19

COMHAFAT VIRTUAL CONFERENCE

The impact of Covid-19 in the fishery resources sector
AU-IBAR PRESENTATION

JULY 2020





Underpinning AU instruments

- A key goal for Africa's transformation and renaissance is harnessing the potential of Africa's aquatic endowments for Blue economy growth – this is set as goal for the attainment of Aspiration 1 in the Agenda 2063 (A ***prosperous Africa based on inclusive growth and sustainable development***) for the Africa we want!

- Other AU instruments that laid the foundation for blue economy development of the continent:
- *Policy Framework and Reform Strategy for fisheries and aquaculture in Africa*
- *African Integrated Maritime Strategy*
- *Lomé Charter*

Opportunities for fisheries exploitation and development

The African continent is adjacent to some of the most productive large marine ecosystems. Africa's oceans, seas, lakes, rivers are a major source of wealth and livelihoods to millions of people.

Marine

West coast LMEs:

I. ***The Benguela Current LME*** - *(Angola, South Africa, Namibia)*

II. ***The Guinea Current LME*** - *(Guinea Bissau, Guinea Conakry, Cape Verde, Sierra Leone, Liberia, Benin, Togo, Cote D'Ivoire, Nigeria, Cameroon, Gabon, Equatorial Guinea, Sao Tome/Principe, Congo, DR. Congo, Gabon, Angola)*

III. ***The Canary Current LME*** - *(Morocco, Mauritania, Cape Verde, Senegal, Gambia, Guinea Bissau and Guinea Conakry)*

North coast LMEs:

I. **The Mediterranean LME -** *(Algeria,, Egypt, Lebanon, Libya, Morocco, Tunisia)*

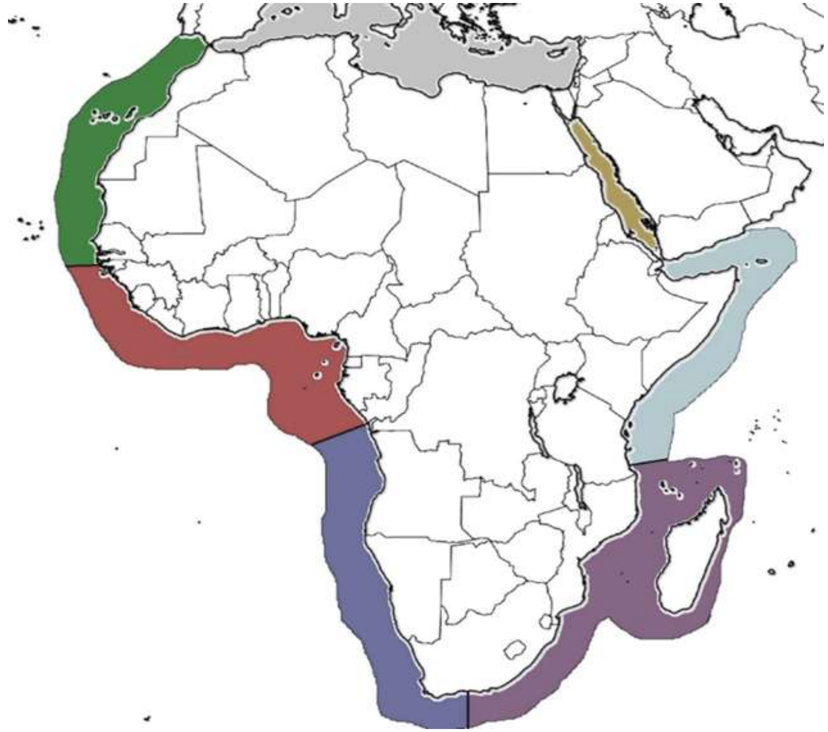
II. **The Red Sea LME** – *(Djibouti, Sudan, Egypt, Eritrea)*

East coast LMEs:

I. **The Somali Current LME** – *(Comoros, Madagascar, Kenya, Tanzania, Somalia)*

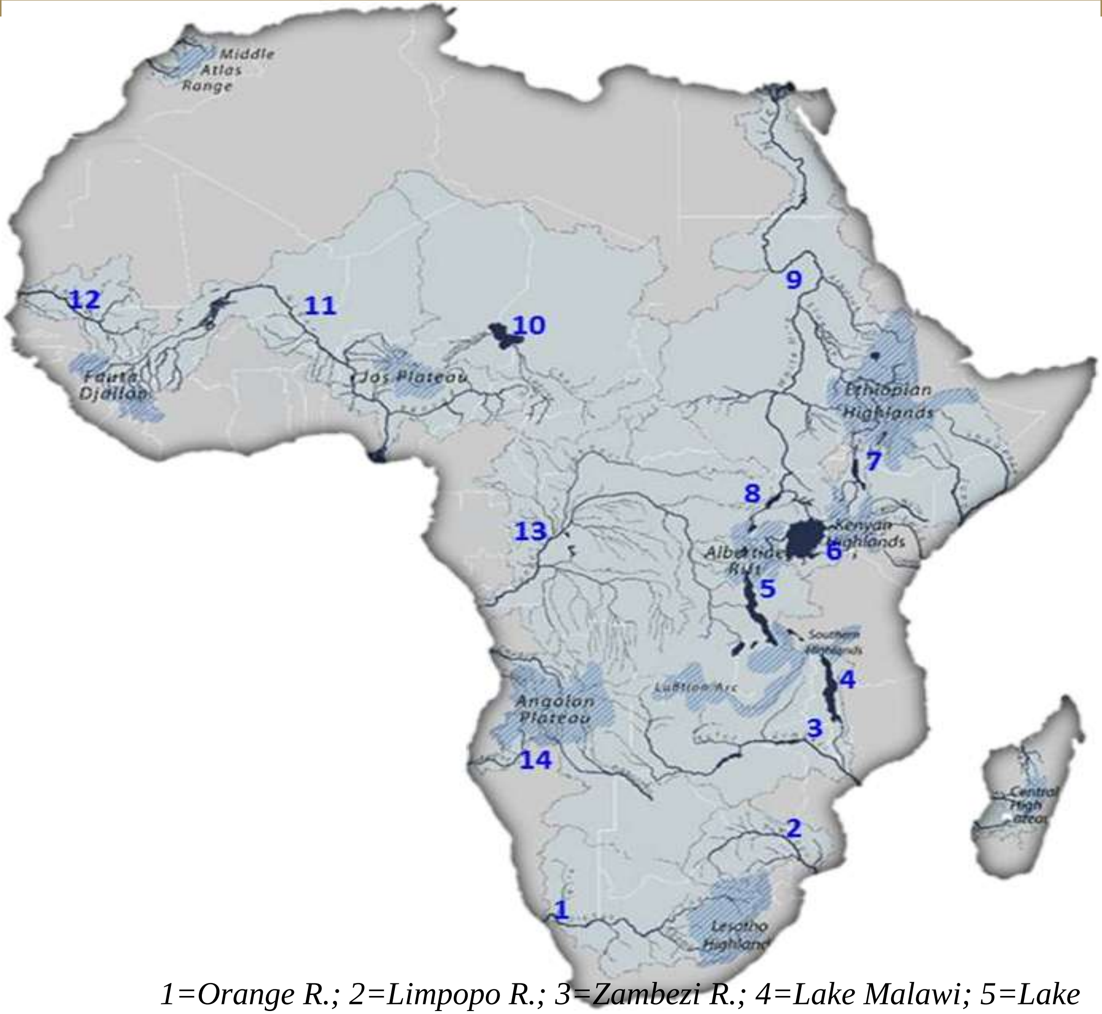
II. **The Agulhas Current LME** (in combination with Somali Current LME) – *(Comoros, Kenya, Madagascar, Mauritius, Mozambique, Seychelles, Somalia, South Africa and Tanzania)*

Africa Large Marine Ecosystems



Blue area ***Benguela Current LME,*** *Red area* ***Guinea Current LME,*** *Green area* ***Canary Current LME,*** *Grey area* ***Mediterranean LME,*** *Orange area* ***Red sea LME,*** *Light Blue area* ***Somali Current LME,*** *Purple area* ***Agulhas Current LME***

Major lakes and rivers on the continent of Africa



1=Orange R.; 2=Limpopo R.; 3=Zambezi R.; 4=Lake Malawi; 5=Lake Tanganyika; 6= Lake Victoria; 7=Lake Rudolph; 8=Lake Albert; 9=Nile R.; 10=Lake Chad; 11=Niger R.; 12=Senegal R.; 13=Congo R; 14=Okavango R.

Target Fish Resources

- Marine

i. *Demersal fish species*

ii. *Crustaceans – Shrimps, Lobsters*

iii. *Cephalopds – Squid, Cuttlefish, Octopus*

iv. *Small pelagics – Sardines*

v. *Large pelagics – e.g. Tunas*

vi. *Gastropoda - snails etc*

vii. *Mollusca - bivalves*

- Inland fisheries

I. *Latidae – nile perch*

II. *Cichlidae – Tilapia*

III. *Claridae – Catfish*

IV. *Bagridae – Bagrus*

- Aquaculture

i. *Tilapia*

ii. *Catfish*

IMPORTANCE OF THE SECTOR- Current benefits

No. of people employed in the sector (primary sector excluding part-time)			Production			
No. fisheries ('000)	No. processors	No. Aquaculture ('000)	Marine (mt)	Freshwater (mt)	Aquaculture (mt)	
5.21		386	6.7 mil (8.3 %)	3.0 mil (25 %)	2.2 mil (2.7 %)	

SOFIA (FAO): 2020

FAO-NFPP (2013: estimated total employment across along the value chain (including part-time, processing) was 12 mil people, with women constituting about 27.3 percent. 4.9 million (42.4 percent) are processors

Overall, women play a crucial role throughout the fish value chain, providing labour in both commercial and artisanal fisheries. Where appropriate technologies and capital are at their disposal, they also act as small-scale entrepreneurs, particularly in household-level cottage operations. In most regions, women are less involved in offshore and long-distance capture fishing.

IMPORTANCE OF THE SECTOR

Contribution to International Trade (USD) -			Contribution to GDP	Current Value added – African fisheries and aquaculture; USD)	Contribution to Food security (Per capita fish consumption)
Africa fish Import	Africa Fish Export				
5.04 billion (3.4 %)	7.2 billion (4.6 %)		1.26 % GDP** 6 % (AGDP	24 billion	9.6 %

Among the various fisheries, the highest value is produced by the marine artisanal fisheries (0.43 percent), followed by marine industrial fisheries (0.36 percent), inland fisheries (0.33 percent), and aquaculture (0.15 percent)

IMPACT OF COVID-19

Impact on Food and nutrition security

DISRUPTION OF SUPPLIES ALONG THE VALUE CHAIN

The overall goal of the Policy Framework and Reform Strategy is to enhance the contribution of the fisheries and aquaculture sector to **food security**, **livelihoods** and wealth creation (income). The goal is currently under threat due to the impact of COVID-19 and the resulting policy choice between Public Health and the PFRS Goal!

- Containment measures and policy decisions as pertaining to Africa productive sector had direct effect on the fisheries and aquaculture sector. Fish is a strategic commodity as declared in 2006 by the Summit of AU Heads of States and Governments. The fisheries resources sector provide essential services, and is a priority sector for food security and economic growth.

Declining Fish Supplies and Availability; The containment measures, including curfew, lockdown, cessation of movement etc having serious impact on fishing activities.

- Thus the non-availability of fishing crews for fishing activities in the small-scale fisheries sector (marine coastal and inland fisheries) has led to reduced fish landings, scarcity in fish supplies and availability in the market and to the consumer.
- Similarly, in the industrial fisheries sector, the policy decisions on closures of land and sea borders resulted in the absence of or limited number of offshore fishing (distant) fishing fleets. Thus the reduced fishing effort from offshore fleet is also having disastrous effect on fish production and supplies on the continent.

IMPACT OF COVID-19

- Likewise in the aquaculture sector, the containment measures pertaining to cessation of movements limit the number of available fish farm workers, the result being limited aquaculture production activity, reduced production and fish supplies.

The current anal fish production of about 11 million mt would significantly reduce, fish supplies and availability reduced and average per capital fish consumption (at blow 10 kg/person) in Africa, already the lowest in the world, would further be threatened.

This would have far reaching implication for the health of the continent since Fish is among the healthiest foods on the planet. It's loaded with important nutrients, such as protein and vitamin D. Fish is also a great source of omega-3 fatty acids, which are incredibly important for the body and brain

Impact on economic activity:

Reduced importation of fishing inputs and the attendant increase in prices of available inputs

- Essential fishing inputs or gears, including nets, corks, lead, ropes are mainly imported from overseas markets. Thus lack of importation of these essential items to both the artisanal and industrial fishing sector contribute to hike in prices of scarce stocks in the markets (e.g. Ghana).

IMPACT OF COVID-19

- In the same vein input supplies vital to aquaculture activities are usually imported from outside the continent. These include feeds, fertilizers, medicines etc. Already the cost of fish feed constitutes over 60 % of aquaculture production costs. The problem is exacerbated by the limited feed availability and hence accompanying cost.

The increased costs of fishing inputs would create economic burden on the fishers and fish farmers (leading to excessive costs of production). The feed component of aquaculture would be far in excess of 60 % of total production cost, in particular

- During recent virtual conference organized by AU-IBAR, between 20-60 % drop in production and income was reported by participants.

Reduction in fish processing, trade and marketing activities:

Women constitute significant employment in the processing sector. The economic impact on women, due to reduction in fish supplies, is therefore huge. The products from these fisheries, especially small-scale fisheries, are often formally or informally traded across borders. Women are dominant actors (constituting over 90 %) in this economic activity. The restriction of movement due to border closures as COVID 19 containment has seriously affected intra-regional fish trade flows and hence the economic activity of women. In Central Africa Republic, due to the close-down of borders, the movement of fish across borders from Cameroon has ceased and the price of fish produced locally from inland water bodies in CAR have escalated due to scarcity (women complained, Africa News, 11-7-2020)

Impact of SME activities

- The fisheries sector provides opportunities to SMEs entrepreneurs conducting various small businesses at fish landing sites or factories. Due to the containment, including lock-down, this important economic activity is seriously affected resulting in loss of income and livelihoods.

IMPACT OF COVID-19

- **Effect on employment and jobs**

The operations of fish factories, ice-making machines, boatbuilding, engine reports etc would be significantly reduced and would inevitably result in huge unemployment for youth with resulting negative impact on livelihoods

Wealth creation

- **Impact on fish export and import and investments – macro-economic**

Due to policy options adopted by the government to contain the coronavirus pandemic, fish import and export activities would be significantly curtailed. Investments in the sector (e.g. fishing agreements with overseas partners) would decline. This would impact negatively on the foreign exchange earnings and hence the GDP in several island and coastal AU member states, in particular.

Sustainable fisheries management and aquaculture

- Threats to implementation of national regulations and control measures – hence threat of illegal fishing and fish farming practices
- Threat to implementation of regional cooperation agreements – e.g.
- Threats to realizing the goals of PFRS, ABES and Agenda 2063
- Threats to realizing the goals of 2030 SDGs

IMPACT ON COVE-19 ON AFRICA BLUE ECONOMY DEVELOPMENT

- African BE sectors and components generate today a value of USD 296 billion with 49 million jobs. It is projected that by 2030, figures will be respectively USD 405 billion and 57 million jobs while in 2063 estimates would respectively be USD 576 billion of value created and 78 millions of jobs (see figure below). The number of jobs would correspond to about 5% of the active population in 2063.
- The main driving sectors of the BE are tourism, both in term of value added and jobs created; the mineral sector, and the Oil and Gas that have a strong contribution to the value added but a low participation in the job creation process.
- The fishery sector will remain stable, with a high number of people employed while the aquaculture will continue to grow in next decades. Port and shipping will grow at a constant rate. The value of blue carbon and other ecosystem services generated by coastal, marine and aquatic ecosystems will progressively increase as conservation efforts expand.
- Education and research will follow the same pattern due to a growing demand for knowledge, especially in the area of deep-sea mining, offshore exploration and climate change mitigation and adaptation. A more detailed presentation of each category of BE follows the graphs.

Value added of BE Sectors and Value of BE components (Ecosystems Services, education, Research, etc.) from 2018 to 2063

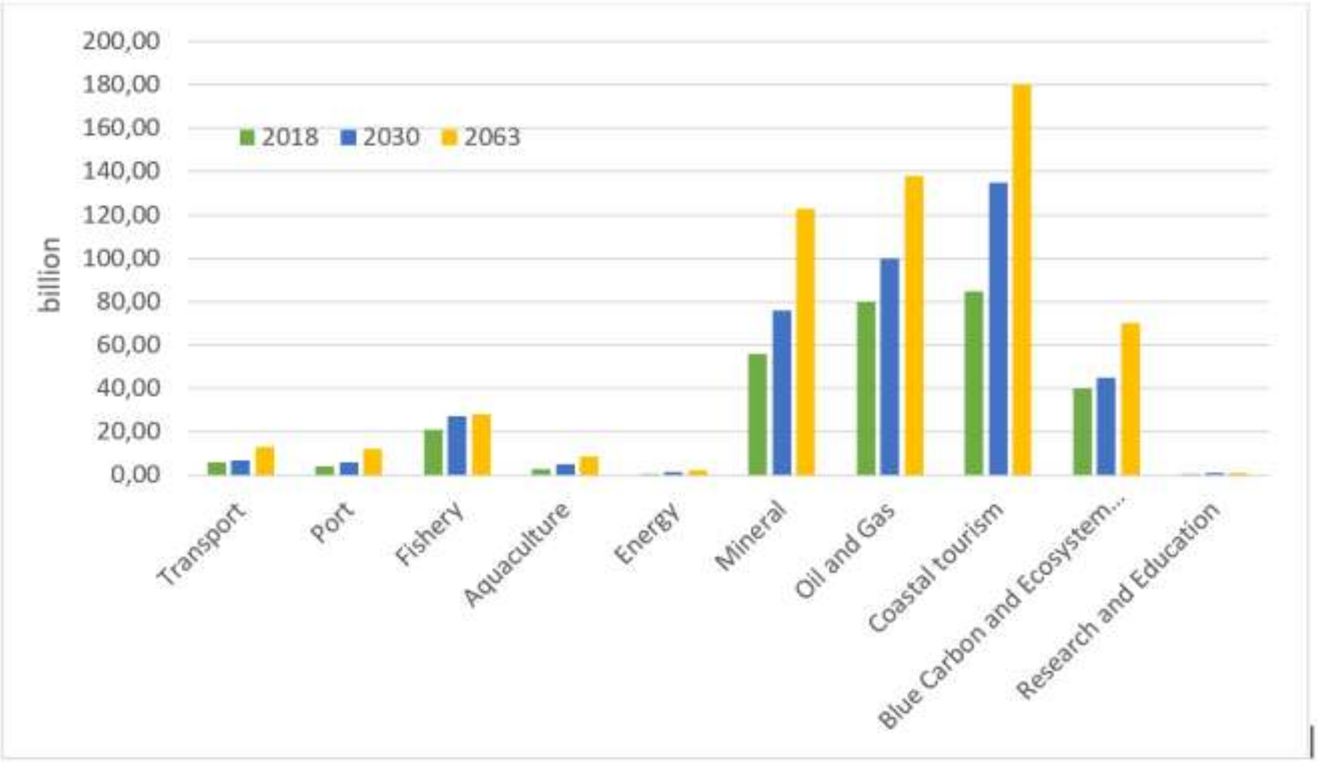


Figure 1 : value created by BE sectors (value added) and components (value of services)

African BE sectors and components generate today a value of USD 296 billion. It is projected that by 2030, figures will be USD 405 billion while in 2063 estimates would be USD 576 billion of value created.

PROJECTED POTENTIAL - mployment, from 2018 to 2063

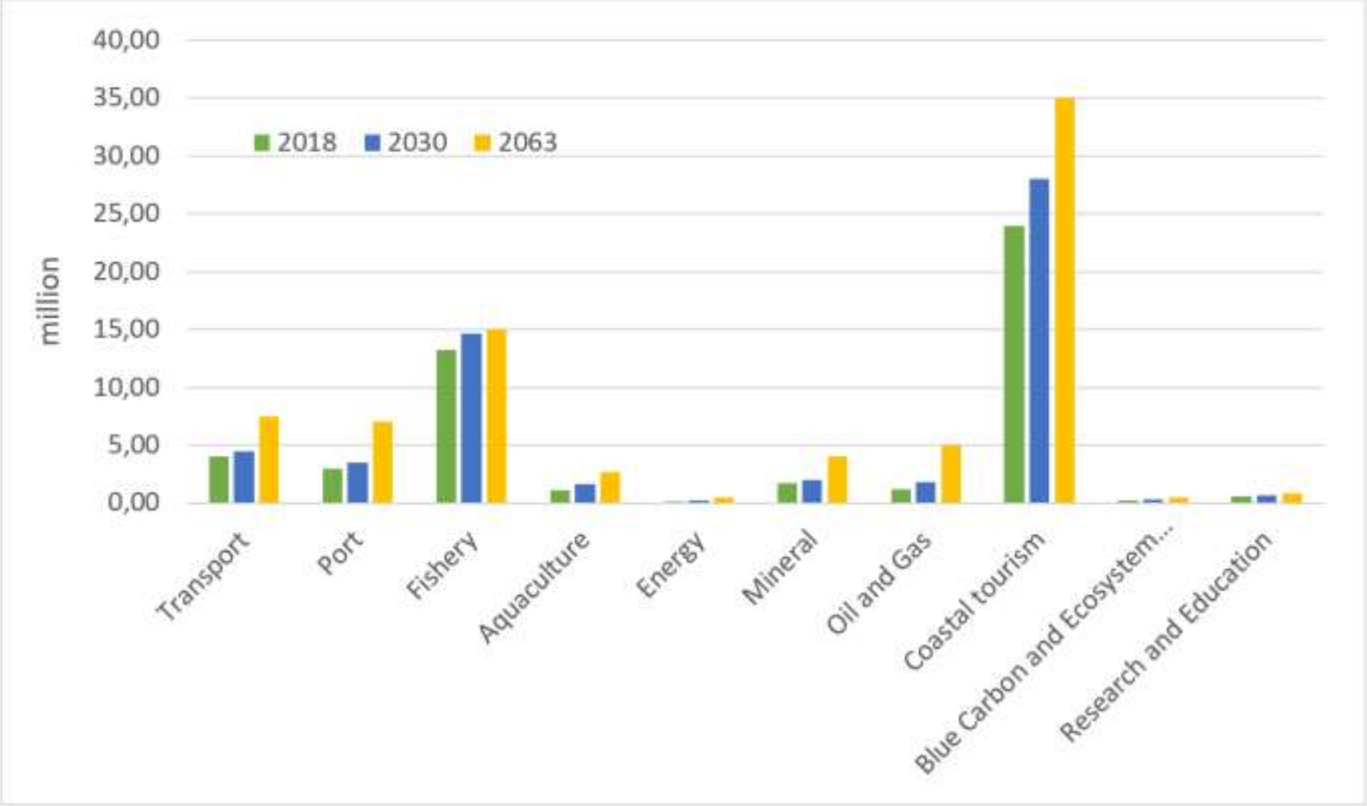


Figure 2 : employment generated by BE sectors and components

African BE sectors and components generate today 49 million jobs. It is projected that by 2030, figures will be 57 million while in 2063 estimates would be 78 million.

Recommendations

1. ***There is an urgent need to better understand the impacts of COVID-19 on economic sectors for evidence based decision making: need for a harmonized framework for assessing the impacts, implementation of response and efficacy of mitigation measures***
2. *Maintain the fisheries and aquaculture resources sector (supply chains, production and processing activities and infrastructure, public and private veterinary, extension and other services, food chains, and various markets) as an essential and frontline services in the fight against COVID-19 and in mitigating its economic impacts*
3. Regional cooperation should be strengthened for coherent containment policy adoptions - with regards to trade liberalization for essential inputs supply markets, cross-border trade, control and protection of shared ecosystems
4. Adoption of regional harmonized policies to classify or designate fish processors, trader, factory workers, fishing crews and fish farmers workers as essential services – preferential regulations during lockdown
5. Strengthened regional markets for enhanced intra-regional fish trade
6. Establish compensation schemes, stimulus package, for sector workers and entrepreneurs and incentives to food importers (fish)

Recommendations

- Harmonized regional policies that would facilitate the movement of migrant fishermen across borders within the safe provision of strict adherence to the existing containment measures of COVID 19
- AU to liaise with international organizations, e.g. wto, to facilitate free flow of essential inputs and sea food products; by urging Govts to minimize border restrictions
- The role of RECS and RFOs should be strengthened and facilitate Governments' action facilitating fisheries access, distribution of seafood products for feeding institutions e.g. schools, care homes. hospitals

Thank You!

AU-IBAR: Providing leadership in the development of animal resources for Africa