

## **Fisheries and Aquaculture in the 4<sup>th</sup> BR Report**

### **Fisheries and Aquaculture Development in Africa (Decision: Doc. EX. CL /627(XVIII))**

#### **1. Introduction**

Africa's vast aquatic resources, encompassing marine and freshwater ecosystems and aquaculture production systems, play a significant role in advancing food security and livelihood, aligning with CAADP Commitments to eradicate hunger and poverty and promote intra-regional trade. Recognizing the crucial importance of the fisheries and aquaculture sector, the African Union has embraced a policy framework to enhance its performance in harmony with CAADP commitments. The recommendations for fisheries and aquaculture development, originating from the first Conference of African Ministers for Fisheries and Aquaculture (CAMFA 1) in 2010 in Banjul, The Gambia, gained endorsement at the 18<sup>th</sup> Ordinary Session of the AU Heads of State and Government in 2011 (Doc. EX. CL /627(XVIII)) (AU, 2011). Subsequently, the Policy Framework and Reform Strategy (PFRS) for Fisheries and Aquaculture was developed and endorsed by the second Ministerial Conference (CAMFA 2). The PFRS blueprint was later adopted by the Summit of African Heads of State and Government in 2014 through Executive Council Decisions No. EX.CL/Dec.831(XXV), serving as a guiding document for reforming Africa's Fisheries and Aquaculture sector reform to maximize benefits for Member States.

The ten Policy goals of the PFRS are consistent with the CAADP Malabo Commitments, with a particular focus on three cross-cutting themes: resilience, gender and youth and financing. There exist a significant alignment between the PFRS goals and the CAADP Commitments, with the exception of Malabo Commitment 7, which pertains to strengthening mutual accountability to actions and results. Moreover, an analysis of available data indicates that fisheries and aquaculture are only partially integrated into the majority of National Agriculture Investment Plans (NAIPs) Regional Agriculture Investment Plans (RAIPs)<sup>1</sup>. As part of the 3<sup>rd</sup> BR, AUDA-NEPAD and AU-IBAR engaged specialists' fisheries and aquaculture expert network to review and recommend key indicators for inclusion in the BR processes. This ensures that fisheries and aquaculture activities and outcomes are systematically incorporated into the BR process and accurately reflecting the sector's role in achieving the Malabo Commitments. The recommended fisheries and aquaculture indicators for inclusion in the BR reporting process are as follow:

- i. Sustainable fisheries and aquaculture production and productivity;
- ii. Increased intra-African regional fish trade and better functioning of national and regional markets;
- iii. Expanded local fisheries and aquaculture industry and value chain development inclusive of women and youth;
- iv. Increased resilience of livelihoods and improved adaptation and risks management in the fisheries and aquaculture sector;
- v. Improved natural resource management for sustainable fisheries and aquaculture.

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<sup>1</sup> Murekezi, P., Martone, E. & Menezes, A. Assessment of the integration of fisheries and aquaculture in policy development – Framework and application in Africa. FAO Fisheries and Aquaculture Technical Paper No. 663. Rome, FAO. <https://doi.org/10.4060/ca9322en>

## **2. Analysis of fisheries and aquaculture contribution**

### **2.1. Commitment to Enhance Investment Finance in Agriculture**

Data reported by member states in the CAADP BR on government expenditure in fisheries as a percentage of total government agriculture expenditure indicates relatively low spending levels for the fisheries sector. Over the period from the 2015 baseline to 2022, the continent allocated an average of about 10.51% of agriculture expenditure in the fisheries sector. Notably, 2019 (8.68%) and 2020 (9.46) recorded the lowest public sector spending, while the allocation remained relatively steady, ranging from 12.33% in 2016 to 9.62% in 2022 across member states. Of significance, nine (9) countries reported public spending on fisheries that significantly exceeded the average in 2022. These countries include Cabo Verde (42.68%), Tanzania (39.61%), Sierra Leone (36.52%), Comoros (30%), Djibouti (24.98%), Mauritania (16.93%), Somalia (15.40%), Guinea-Bissau (15.22%), and Benin (14.14%).

The intensity of public spending in the fisheries sector is a measure of the proportion of fisheries valued added (GDP) reinvested into the sector. It assesses whether the level of spending aligns with the sector's contribution to GDP. For reporting in the CAADP BR, the benchmark for fisheries spending intensity (spending relative to the sector's GDP contribution) is set at 19%, reflecting the achievement of the top ten (10) performing countries. On average, from 2015 to 2022, across Africa, the intensity of fisheries spending represented 12.75% of the GDP generated by the fisheries sector. Notably, there was a decrease from 16.27% in 2018 to 12.88% in 2022. In 2022, only four countries allocated 15% or more of the sector GDP to fisheries spending. These were Benin, Comoros, Djibouti, and Tunisia.

### **2.2. Commitment to Zero Hunger – Ending Hunger by 2025**

Fish consumption in Africa varies significantly across countries, with 3 countries surpassing the global average of 19.4 kg per capita annually (FAO, 2017b). When comparing fish consumption by region, it becomes evident that ECOWAS inhabitants consume nearly four times more fish than those in IGAD. While per capita fish consumption in ECCAS is above the African average, when combined with EAC, it registers the lowest average total protein intake of 53.1 grams per capita per day among the African RECs.

Research conducted in Malawi, Uganda and Tanzania has uncovered that households in rural areas near water bodies tend to have higher levels of fish consumption. Furthermore, studies have demonstrated the critical role of inland fisheries in enhancing the diet quality of young children in sub-Saharan Africa. Approximately 20% of rural children in this region rely on fish for a more diversified diet, and it has been observed that children who consume fish are less likely to experience stunting.

### 2.3. Halving Poverty by 2025

A 2022 research paper illustrated a strong correlation between Small-Scale Fisheries, reduced poverty, increased fish consumption, and improved food security<sup>2</sup>. This research underscores the vital role of fisheries and aquaculture in ensuring livelihood security, with evidence showing that households engaged in fishing are 9% less likely to experience income-poverty compared to those involved in agriculture. Furthermore, households residing in close proximity to water bodies are more likely to achieve a diverse and nutritious diet than those situated farther away. Additionally, households near water bodies tend to exhibit higher levels of asset wealth compared to non-fishing households. Overall, the study provides empirical evidence of the beneficial connection between Small-Scale Fisheries, poverty reduction, increased fish consumption and enhanced food security in Malawi, Tanzania and Uganda.

### 2.4. Boosting Intra regional trade

Fisheries and aquaculture are critical sectors of the African continent, as recognized by the Abuja Declaration of 2006. However, their significance is not adequately represented in the CAADP in the CAADP Results Framework and other strategic frameworks. Fish continue to be the most highly traded commodity, contributing significantly to both intra- and inter-regional fish trade in Africa. Studies conducted by WorldFish, AU-IBAR and AUDA-NEPAD have revealed a robust informal trade network for fish and fisheries products across African borders. For example, research conducted in three selected markets in Ghana has estimated an annual informal export of around 6,000 metric tons of fish to neighbouring countries with an annual market value of US\$18.6 million<sup>3</sup>. Zambia has seen an estimated 102,000 tons of fish, valued at US\$3.3 million, informally exported to neighbouring countries. In Malawi, informal fish exports to neighbouring countries have been estimated at over 24,000, with a total value of US \$42 million. It is crucial to note that these figures significantly surpass official statistics, which do not account for informal trade activities.

Fisheries and aquaculture are among the most genderized subsectors, with extensive and active participation from women and youth, particularly in the fish production and trade value chain. Consequently, the demographics of informal trade in Africa are noteworthy, as a significant portion of informal cross-border fish traders are under 40 years of age. In fact, youth participation is remarkably high throughout the entire value chain. This underscores the sector's vital importance in income generation among Africa's growing populations.

## 3. Recommendations

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<sup>2</sup> Simmance, F. A., Nico, G., Funge-Smith, S., Basurto, X., Franz, N., Teoh, S. J., Byrd, K. A., Kolding, J., Ahern, M., Cohen, P. J., Nankwenya, B., Gondwe, E., Virdin, J., Chimatiro, S., Nagoli, J., Kaunda, E., Thilsted, S. H., & Mills, D. J. (2022). Proximity to small-scale inland and coastal fisheries is associated with improved income and food security. *Communications Earth & Environment*, 3(1). <https://doi.org/10.1038/s43247-022-00496-5>.

<sup>3</sup> Ayilu RK, Antwi-Asare TO, Anoh P, Tall A, Aboya N, Chimatiro S and Dedi S. 2016. Informal artisanal fish trade in West Africa: Improving cross-border trade. Penang, Malaysia: WorldFish. Program Brief: 2016-37. Available on: [http://pubs.iclarm.net/resource\\_centre/2016-37.pdf](http://pubs.iclarm.net/resource_centre/2016-37.pdf)

- **Fine tune Fisheries and aquaculture indicators:** Conducting a critical analysis of the recommended fisheries and aquaculture indicators for the BR Report is a vital step in enhancing the sector's visibility and effectiveness within the CAADP framework. By ensuring the indicators' significance, alignment with broader goals, sensitivity to context, comprehensiveness, data reliability, capacity for measuring progress and impact, and stakeholder engagement, the CAADP process can better capture and harness the potential of fisheries and aquaculture for sustainable food systems transformation in Africa.
- **Increase Investment in the Fisheries Sector:** Recognizing the low levels of government expenditure in the fisheries sector compared to the broader agriculture sector, it is recommended that African countries prioritize increased investment in fisheries. Governments should allocate a higher percentage of their agriculture budgets to fisheries to support the sustainable growth of the sector. This can be achieved through strategic allocation of resources and investment in initiatives that promote sustainable fisheries and aquaculture production.
- **Promote Fish Consumption and Food Security:** Given the significant variation in fish consumption across African countries and regions, efforts should be made to promote fish consumption, particularly in regions where it is lower than the African average. Policies and programs should be designed to enhance access to fish, especially for vulnerable populations, and to improve diet quality. Inland fisheries, crucial in providing diverse and nutritious diets, should be supported and expanded.
- **Boost Intra-Regional Fish Trade:** Integrating fisheries into the AfCFTA framework presents a significant opportunity to formalize and boost intra-Africa regional fish trade. By harmonizing regulations, improving infrastructure, promoting sustainability, and fostering collaboration, African nations can harness the full economic potential of their fisheries resources while ensuring food security and livelihoods for their citizens.
- **Leverage Small-Scale Fisheries for Poverty Reduction:** Small-scale fisheries have been shown to have a positive impact on poverty reduction, food security, and income generation. To harness this potential, governments and stakeholders should invest in and support small-scale fisheries, ensuring that they receive adequate resources and attention. This can include providing access to fishing resources, improving infrastructure, and facilitating access to markets.

#### 4. Conclusions

- The National Agricultural Investment Plans (NAIPs) and Regional Agricultural Investment Plans (RAIPs) continue to serve as essential instruments for the implementation of CAADP Commitments, aligned with the recommendations for the development of fisheries and aquaculture across the continent.
- Despite the African Union's recognition of the substantial economic and social benefits associated with fisheries and aquaculture development in Africa, investment finance in this sector remains notably inadequate.

- The available data in the BR highlights the fisheries sector's potential contribution, but the persistently low level of investment undermines its capacity to significantly impact economic transformation and inclusive growth.
- Presently, the BR process does not include a comprehensive tracking mechanism for the progress of the fisheries and agriculture sectors at the indicator level. Despite recommendations made during the 3rd BR process, the implementation of targeted indicators for fisheries and aquaculture has not yet been realized.