

# **GLOBAL FISH TRADE OVERVIEW AND FISH MARKETING IN ECOWAS**

**By**

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**INFOSA (fish trade information in SADC  
region)**

**&**

**CFC Project in Guinea and Mauritania on  
value on diversification and value added**

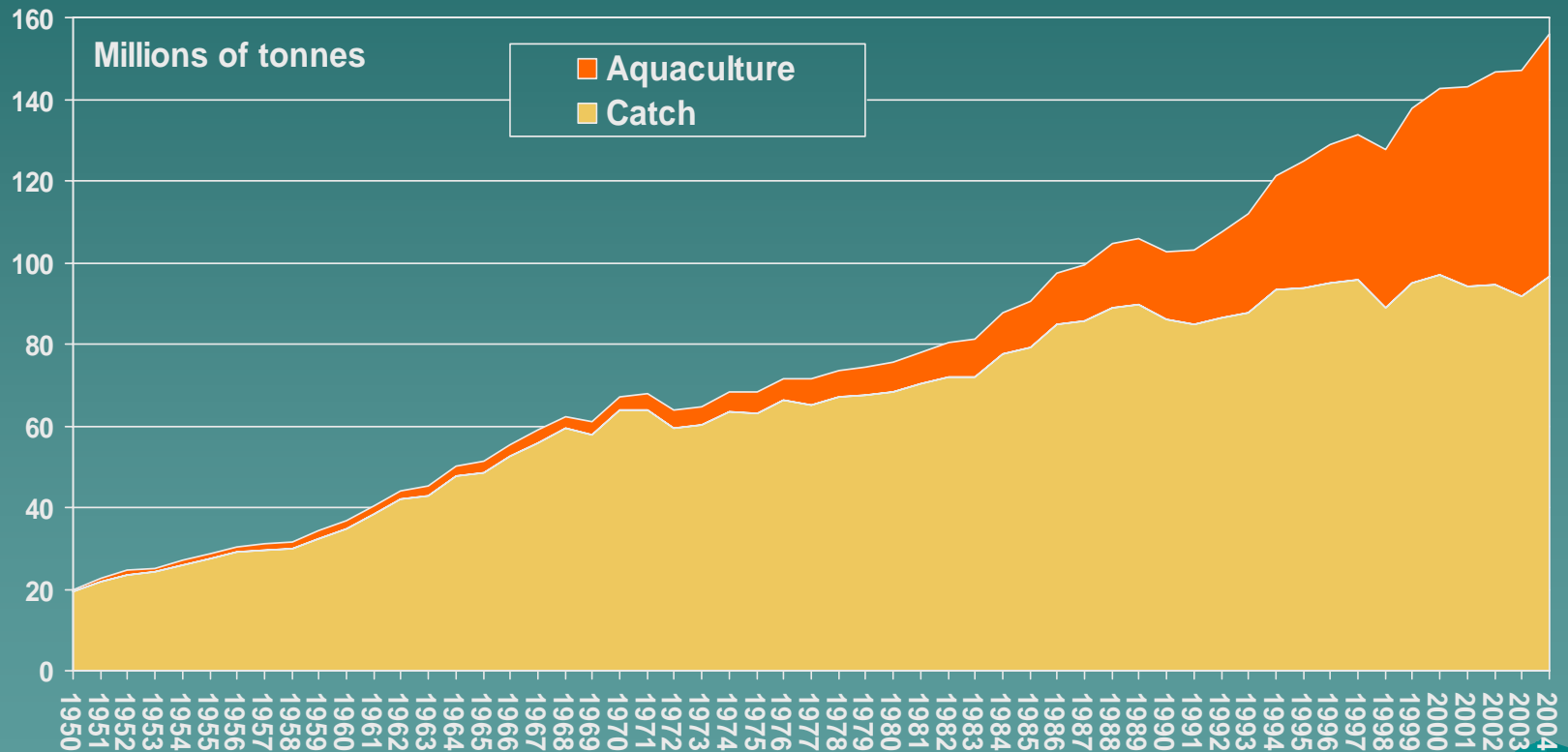
# OUTLINE

- ◆ WORLD FISH SUPPLY
- ◆ WORLD FISH TRADE
- ◆ ECOWAS FISH PRODUCTION AND TRADE
- ◆ OBSTACLES TO THE DEVELOPMENT OF FISH TRADE IN ECOWAS
- ◆ IMPROVING FOR BETTER TRADE IN ECOWAS
- ◆ CONCLUSIONS AND RECOMMANDATIONS

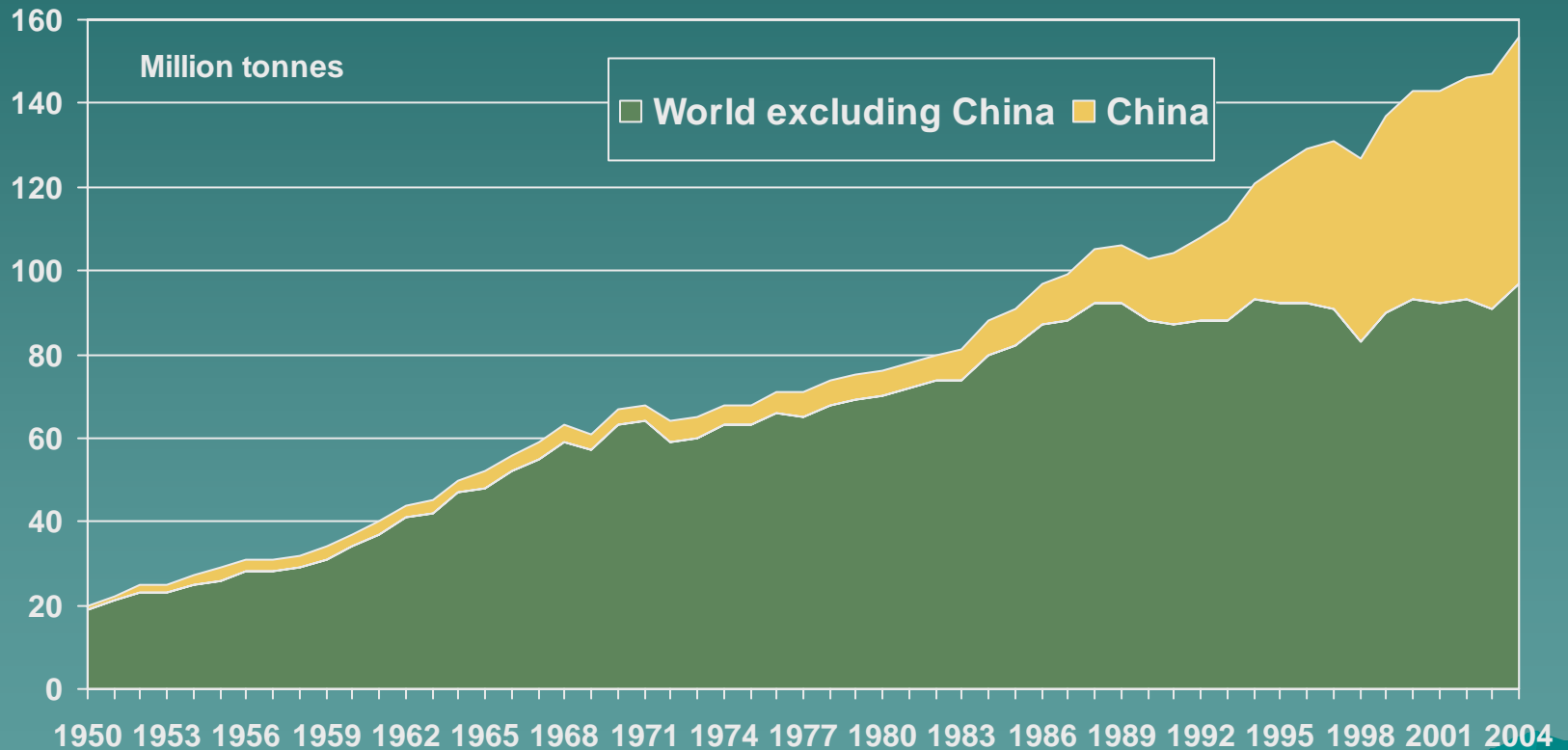
# WORLD FISH SUPPLY (2003-2002)

- ◆ Catches: 95 (90, 93) million tons
- ◆ Aquaculture: 45 (43, 40) million tons
- ◆ Total: 140 (133, 133) million t.

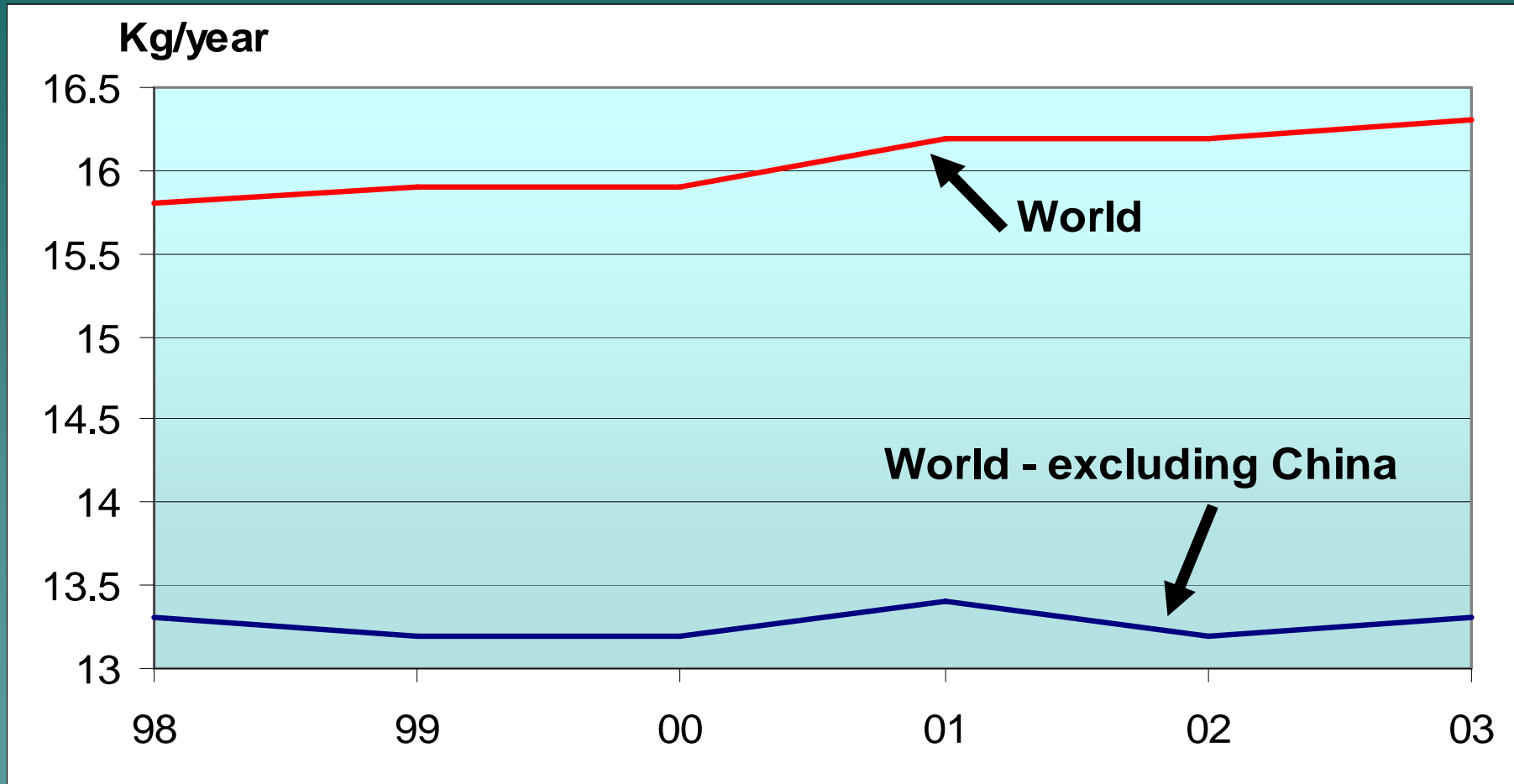
# WORLD FISH SUPPLY (PRODUCTION)



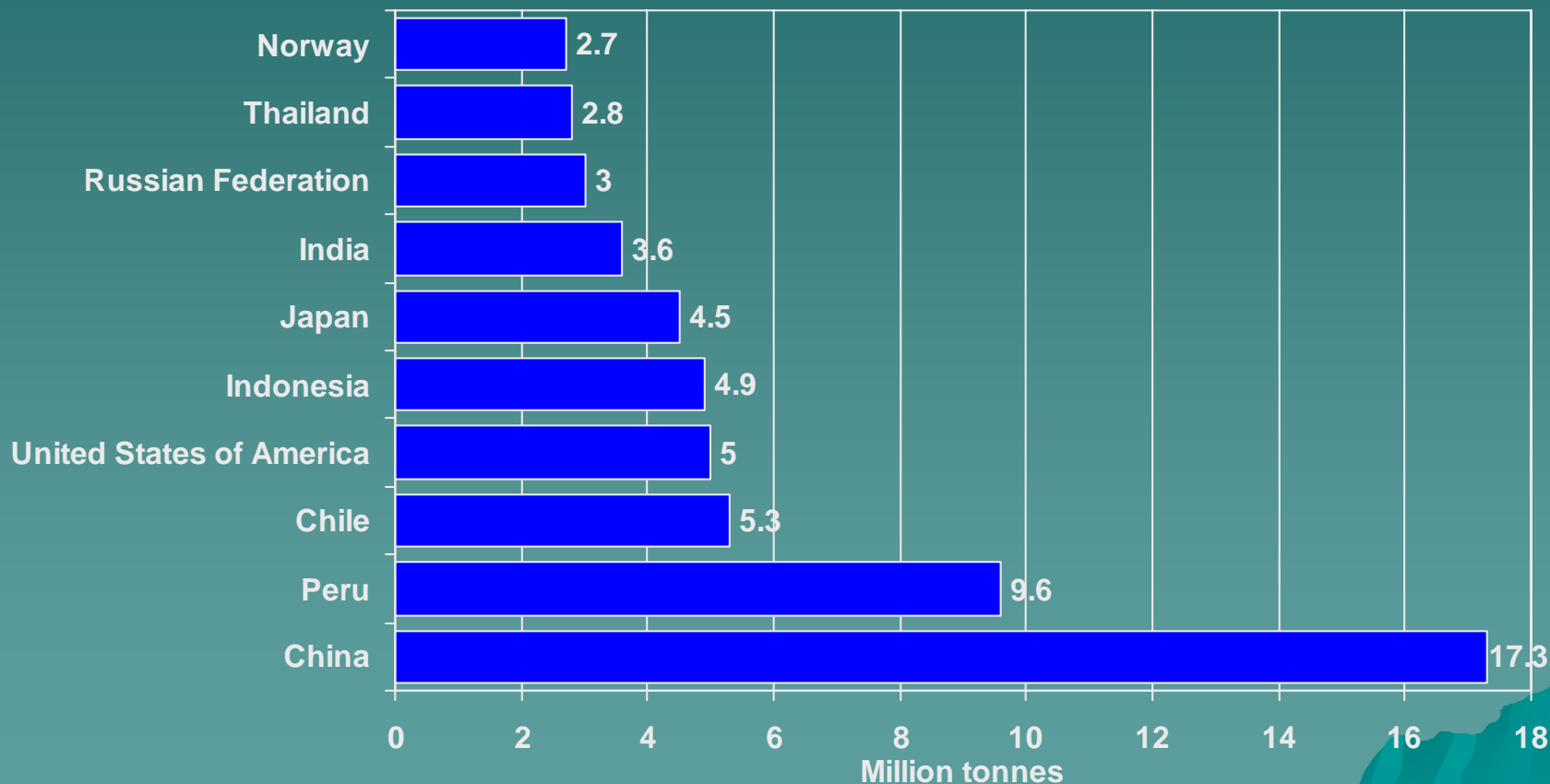
# WORLD CAPTURE AND AQUACULTURE PRODUCTION



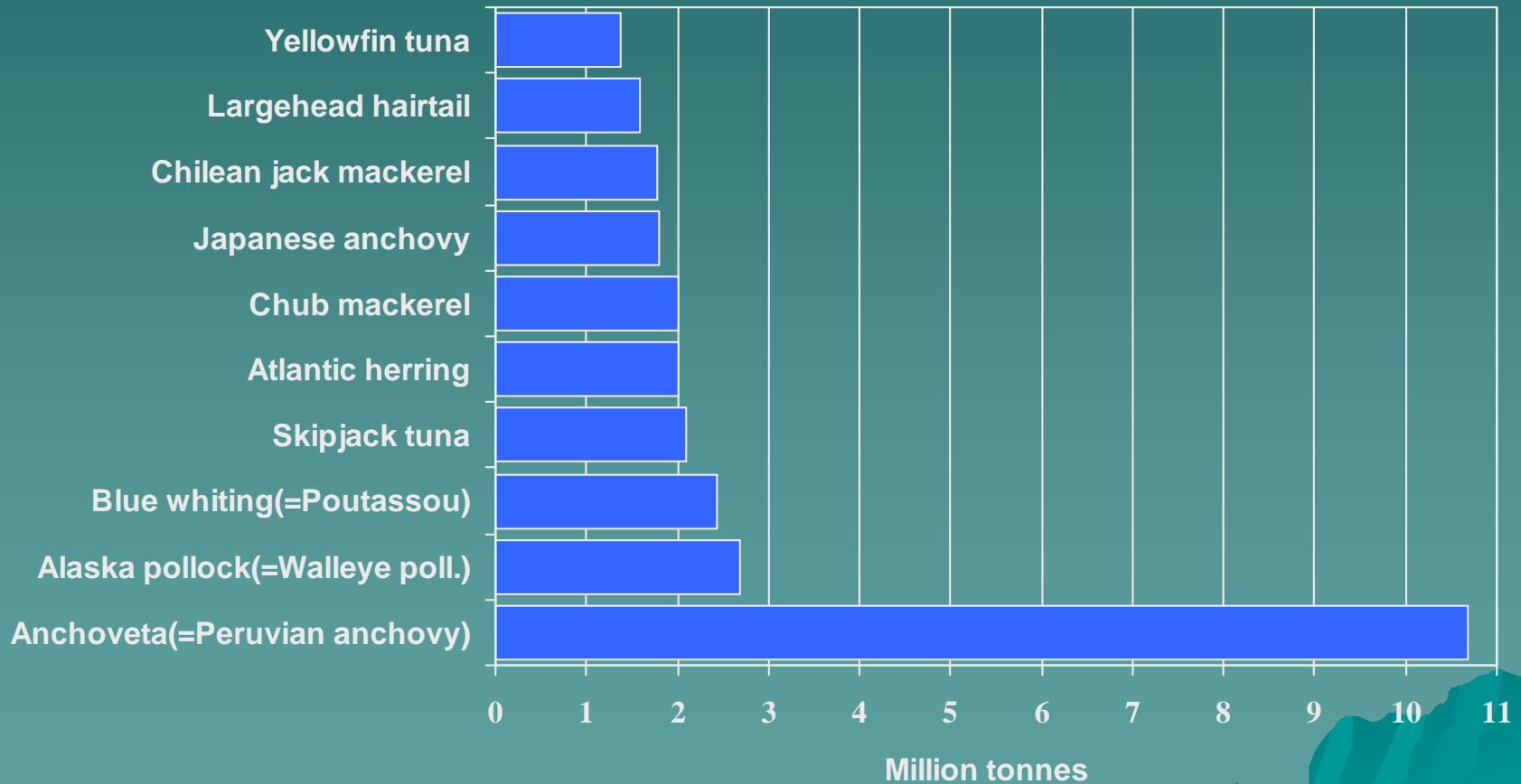
# PER CAPITA FOOD FISH SUPPLY



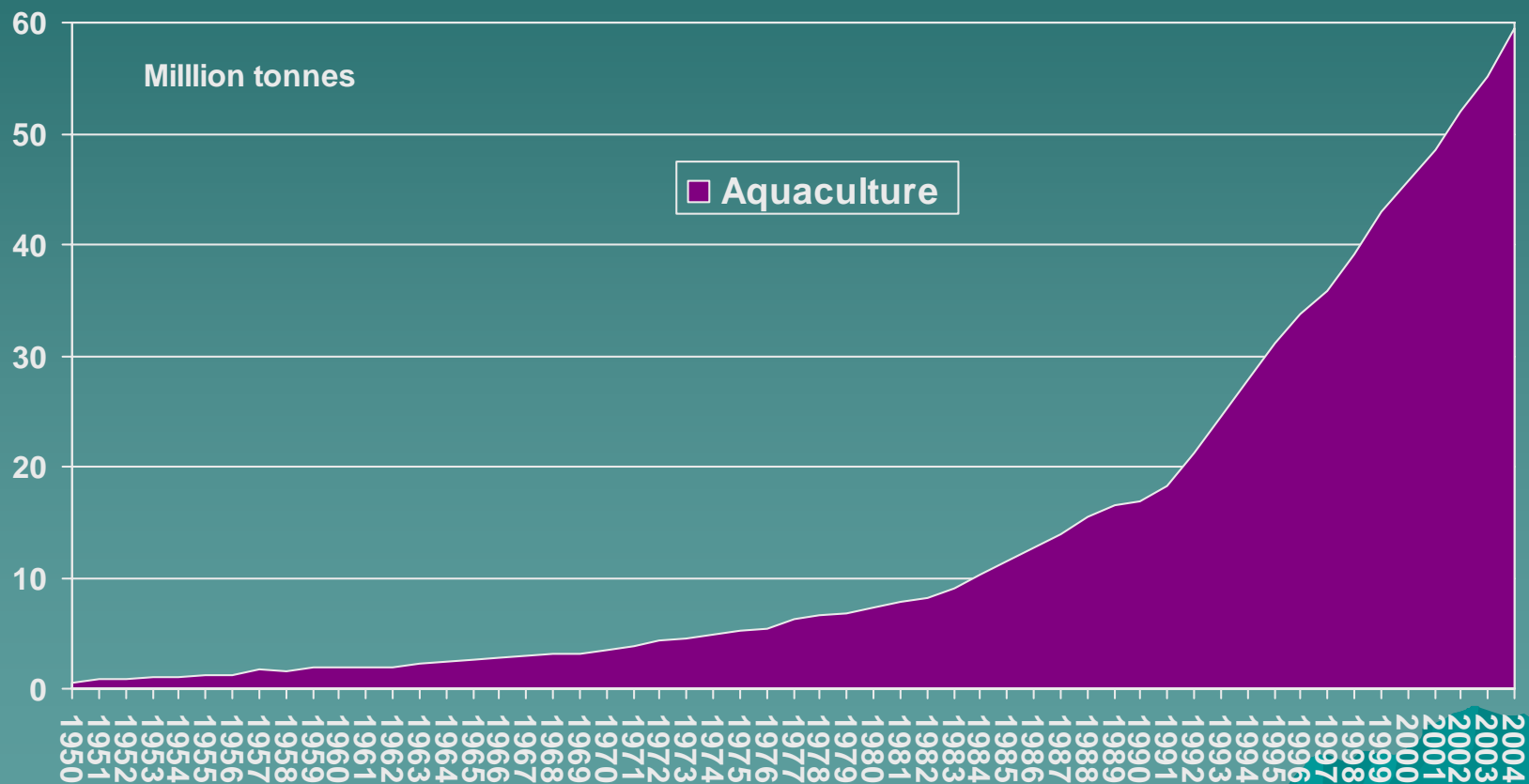
# MARINE AND INLAND FISHERIES: TOP 10 PRODUCERS (2004)



# MARINE SPECIES - TOP 10 – (2004)



# WORLD AQUACULTURE PRODUCTION: GROWING QUICKLY



# AQUACULTURE PRODUCTION 2004 BY COUNTRY

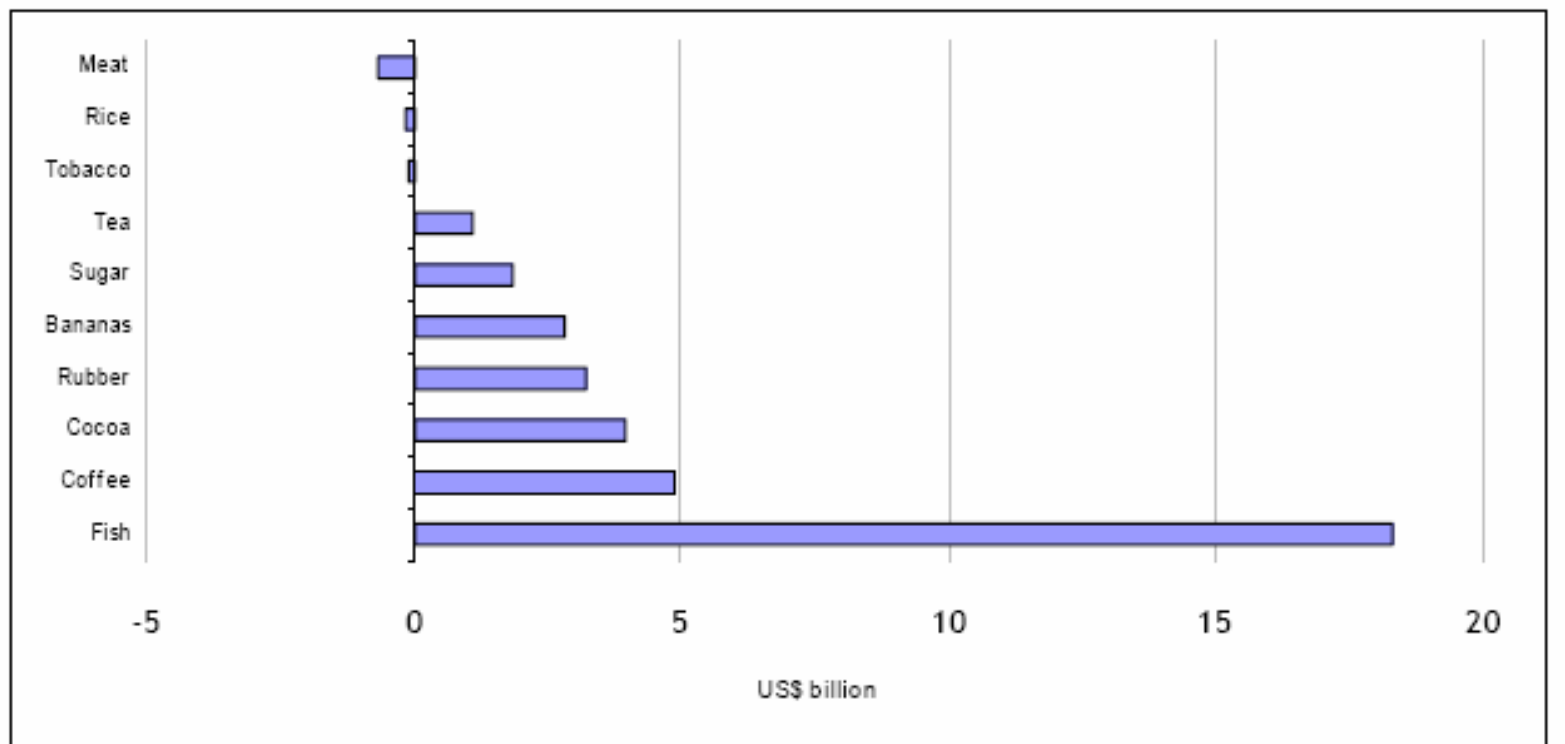
◆ China	30.6 million tonnes	(67 %)
◆ India	2.3	( 5 %)
◆ Viet Nam	1.2	( 3 % )
◆ Indonesia	1.0	( 2 %)
◆ Bangladesh	0.9	( 2 %)
◆ Japan	0.8	( 2 %)
◆ Thailand	0.8	( 2 %)
◆ Chile	0.7	
◆ Norway	0.6	
◆ Egypt	<u>0.5</u>	
◆ <b>Total world</b>	<b>45.5 million tones</b>	

# **WORLD FISH EXPORTS**

## **US\$ 72 BILLION (2004)**

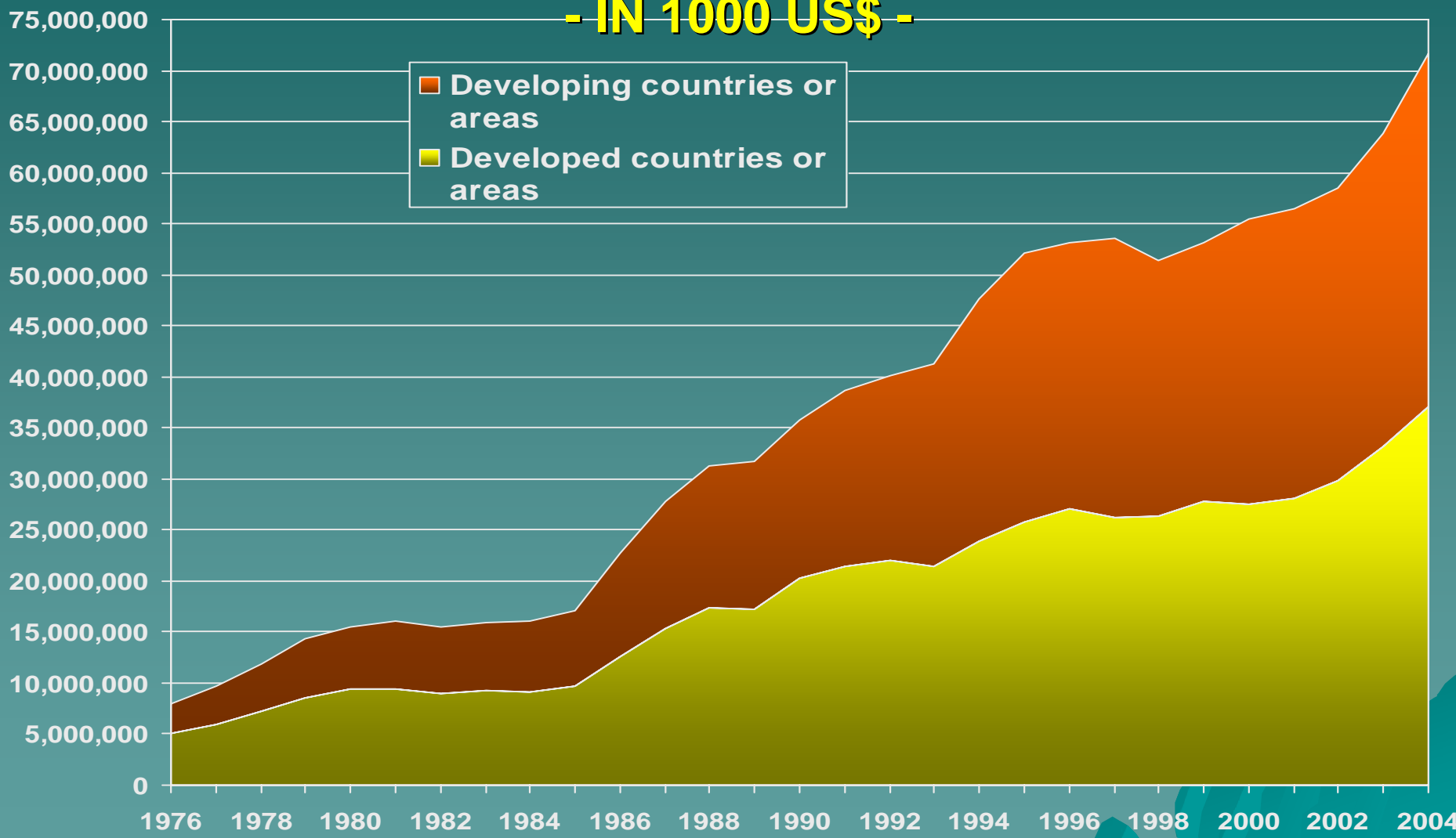
- ◆ **TRADE IS GROWING: 2004 + 12.7 %**
- ◆ **DEVELOPING COUNTRIES: 50 % OF WORLD FISH EXPORTS**
- ◆ **NET EXPORT REVENUES FROM FISHERIES CRUCIAL FOR MANY DEVELOPING COUNTRIES (US\$ 20 bill. in 2004)**

# NET EXPORTS BY DEVELOPING COUNTRIES IN 2003

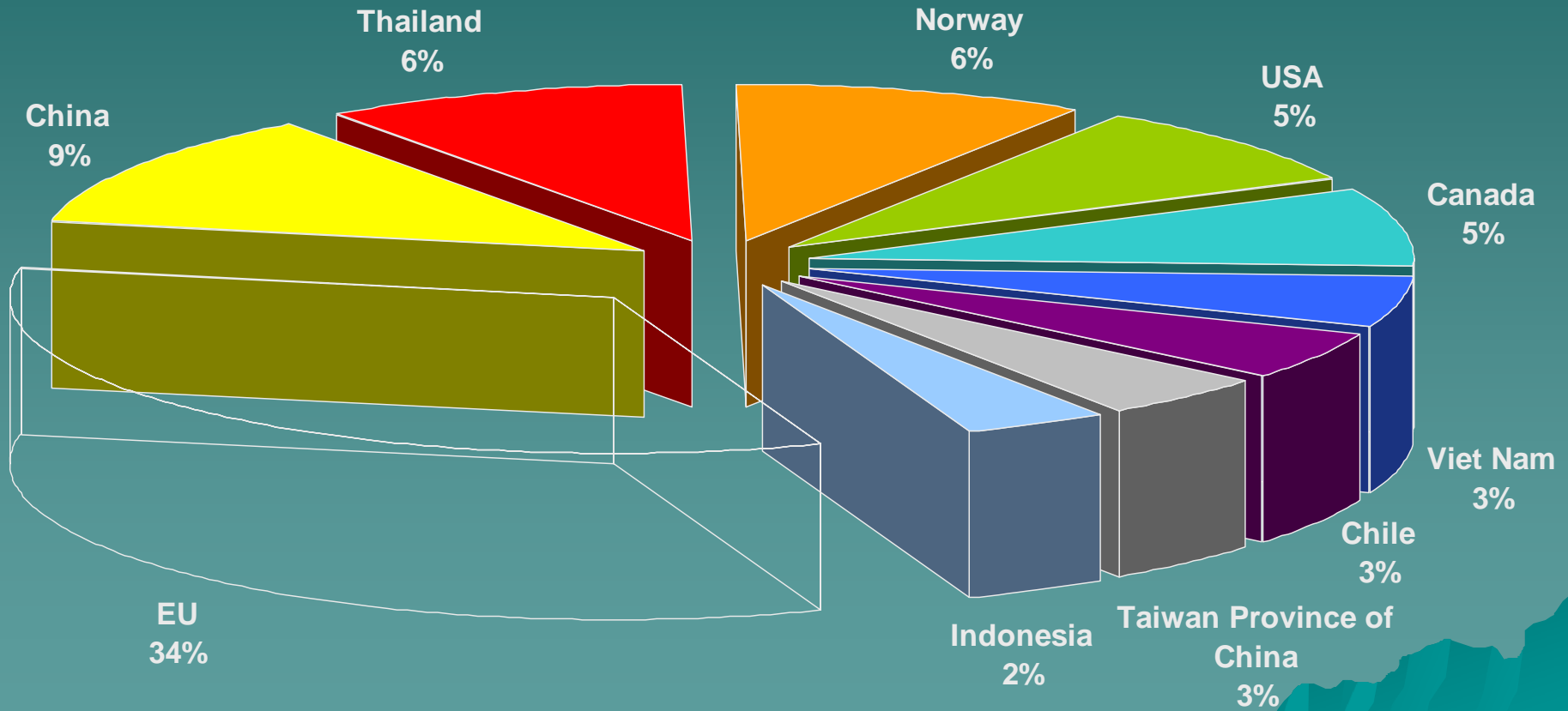


# WORLD FISH TRADE: EXPORT VALUE

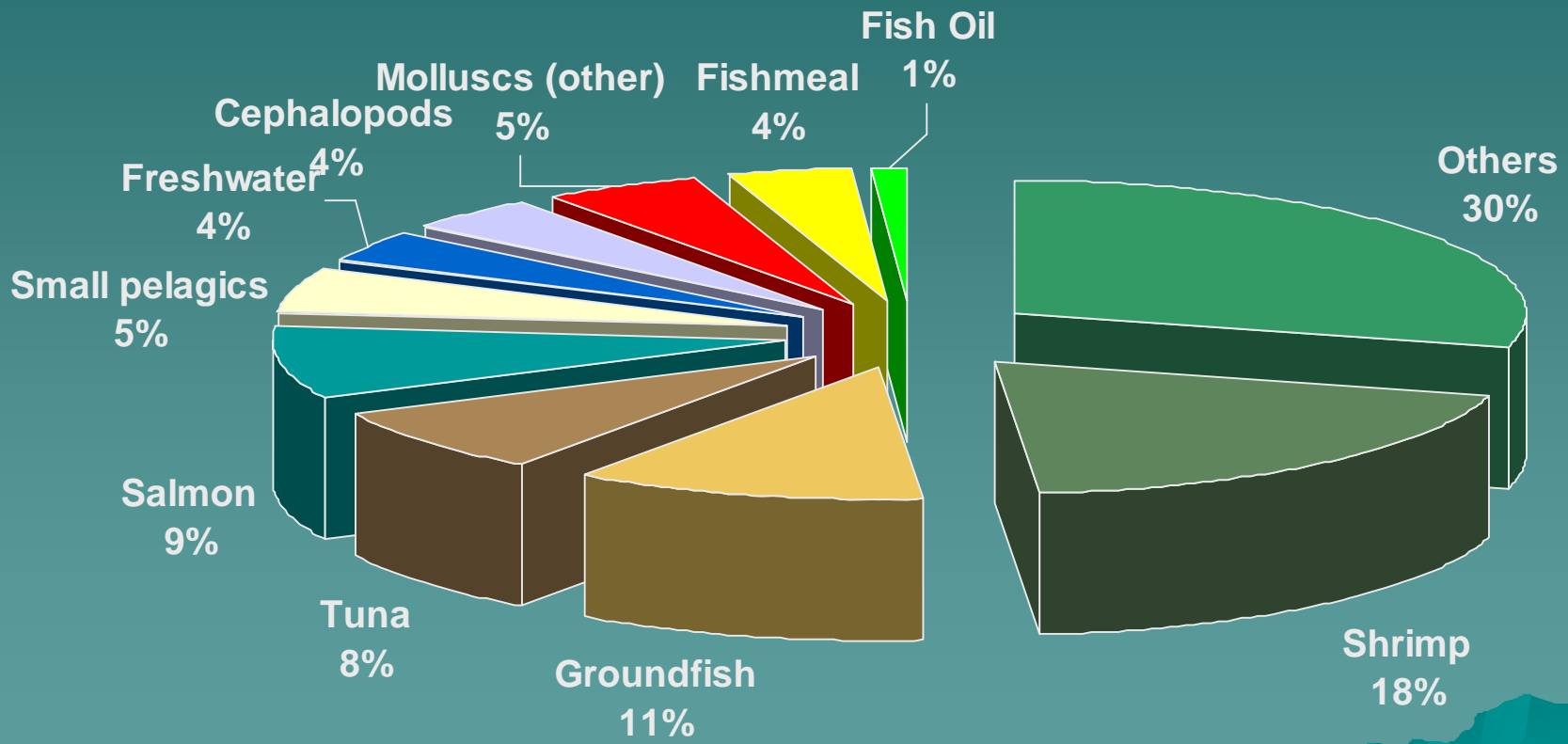
- IN 1000 US\$ -



# MAIN EXPORTERS 2004 (VALUE)



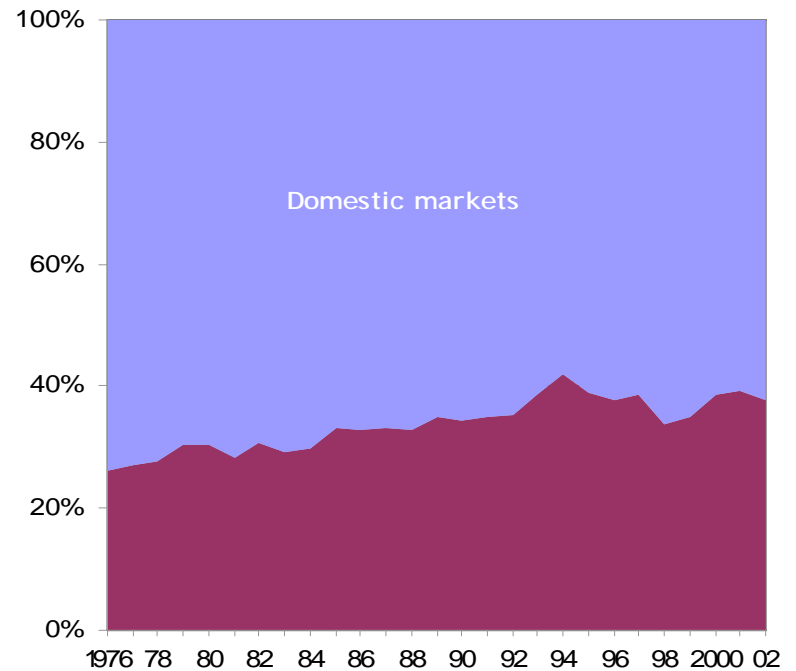
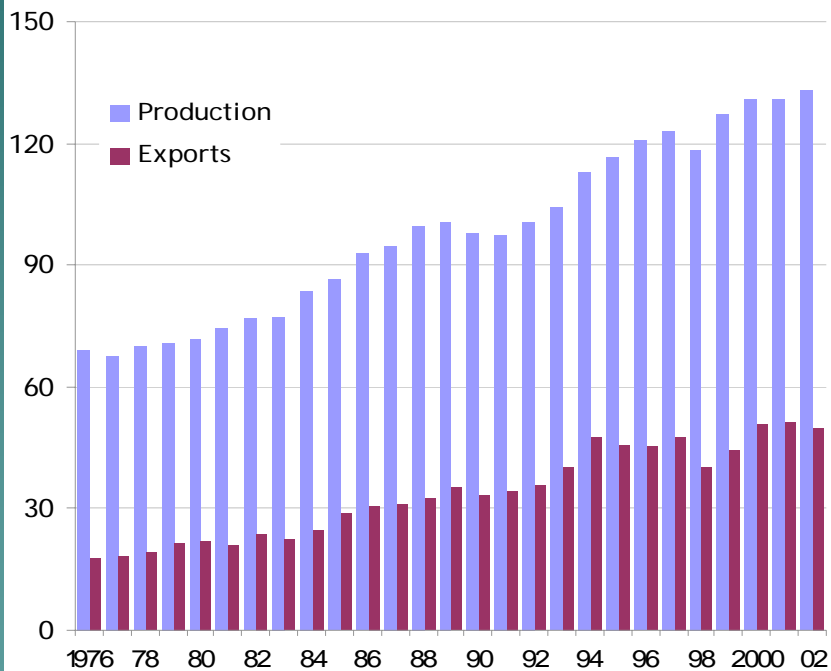
# MAIN SPECIES EXPORTED IN 2004 (VALUE)



# SHARE OF FISHERY PRODUCTS DESTINED FOR EXPORTS

Share of fishery production destined for exports

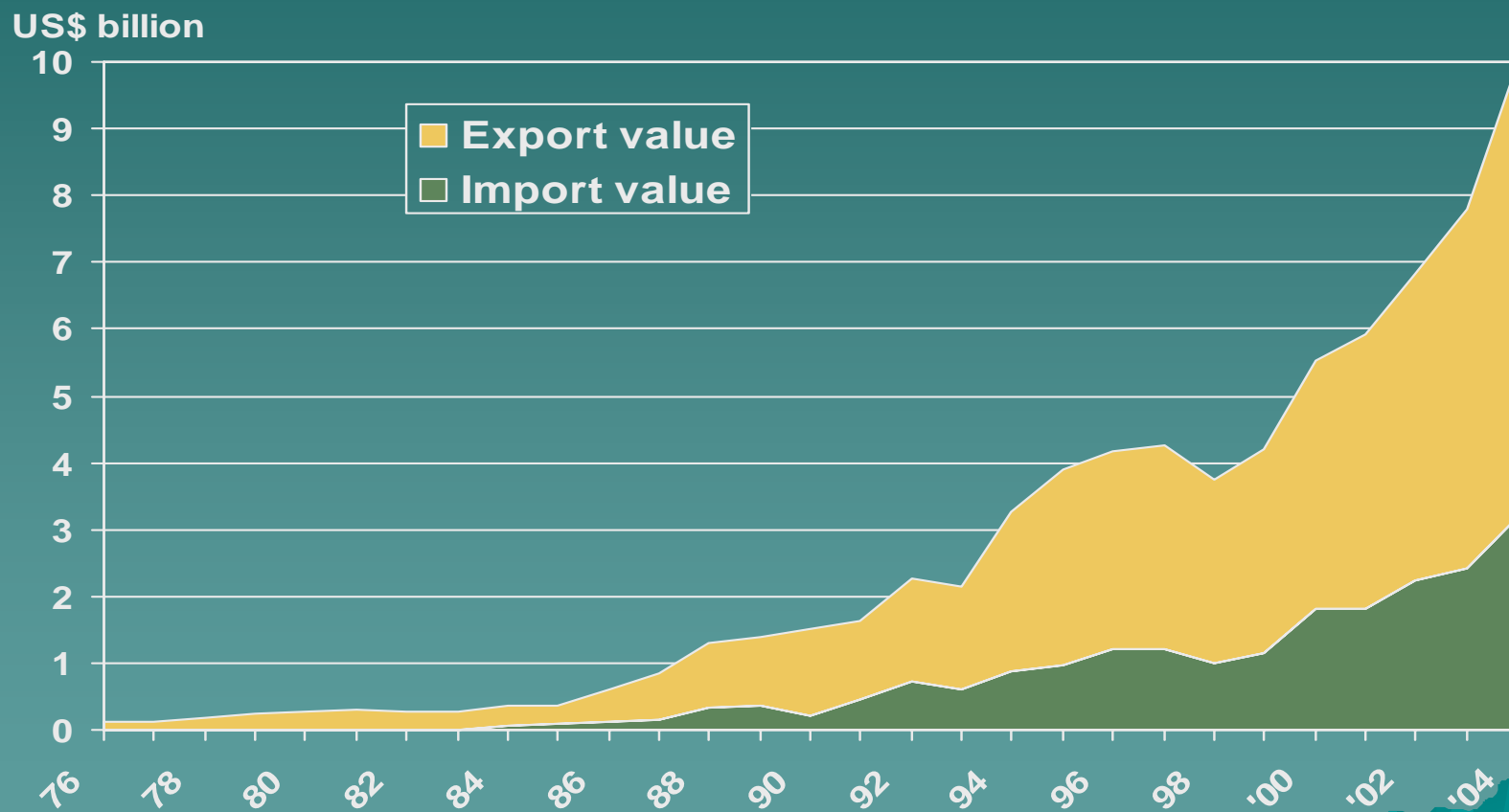
Million tonnes (live weight)



# MAIN WORLD FISH IMPORTERS (2004)

- ◆ Japan US\$ 14.6 bill. (19.3 %)
- ◆ US US\$ 12.0 bill. (15.9%)
- ◆ EU US\$ 29.4 bill (39.1%)
- ◆ Total US\$ 56.0 bill (74.3 %)

# IMPORTS AND EXPORTS OF FISH AND FISHERY PRODUCTS: CHINA



# FISH PRODUCTION AND TRADE IN ECOWAS

- ◆ West African Coast from Mauritania to Nigeria
- ◆ coastline 6,500 Km<sup>2</sup>
- ◆ Continental shelf 310,050 Km<sup>2</sup>
- ◆ Foreign and national industrial fishing vessels and Small sail/ motorized canoes 18-20 meters long carry larger crew
- ◆ Artisanal fisheries top priority and heavily subsidies: access to modern equipment and gear; ice plants and insulated trucks through projects and tax free,

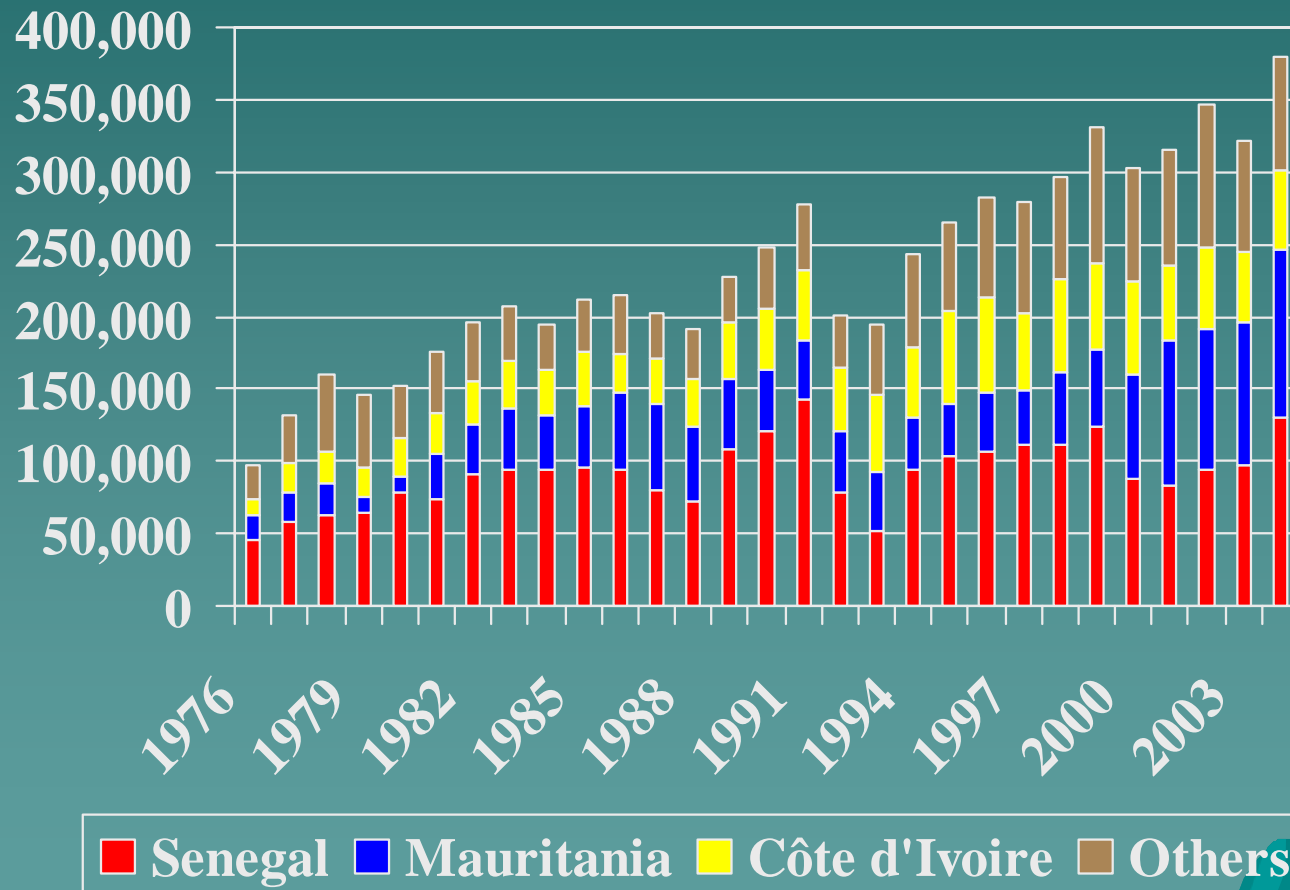
# FISH PRODUCTION AND TRADE IN ECOWAS

- ◆ Catches utilized for local and foreign markets
- ◆ 40% of animal protein
- ◆ 2,051,230 tm landed annually
- ◆ 1,000,000 fishermen
- ◆ Per capita fish consumption 10 world average is 16.5 kg

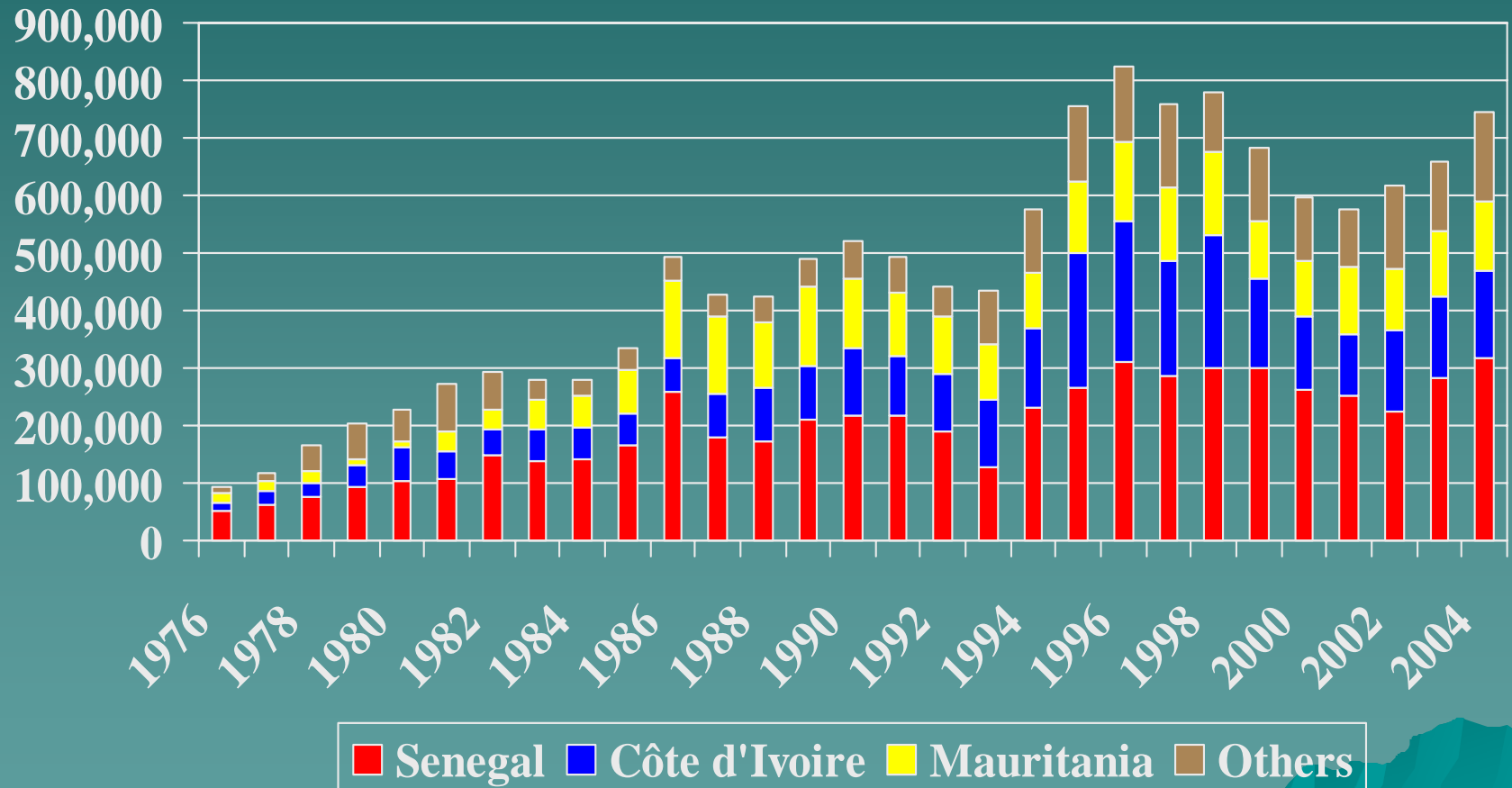
## EVOLUTION OF FISH PRODUCTION IN ECOWAS

COUNTRIES	2000	2001	2002	2003	2004
Burkina Faso	8505,5	8505,5	8505,5	9005,5	9.005
Benin	32324	38415	39478	41900	39.995
Cape Verde	10822	8890,5	7762,5	8721	8446
Côte d'ivoire	76969	74581	80495	69769	55.264
Gambia	28909,5	34527	45769	36865	31423
Ghana	457071	453182	377178	391694	400.320
Guinea	91514	104360	92755	118845	92.550
Guinea-Bissau	6316,5	6848	7325	6153,5	6.200
Liberia	11748	11300	11014	10714	9.830
Mali	109900	100500	101098	101098	101.098
Mauritania	109456,5	135142	149131	141898	199.380
Niger	16265	20821	23600	55900	51.506
Nigeria	467096	473878	511719	504111	445.201
Sierra Leone	74760	75240	82990	96926	132.455
Senegal	432020	431486	400295	472747	440.541
Togo	22382	23288	20825	28710	28015,5
<b>TOTAL</b>	<b>1.956.059,5</b>	<b>1.990.964</b>	<b>1.959.940</b>	<b>2.095.057</b>	<b>2.051.230</b>

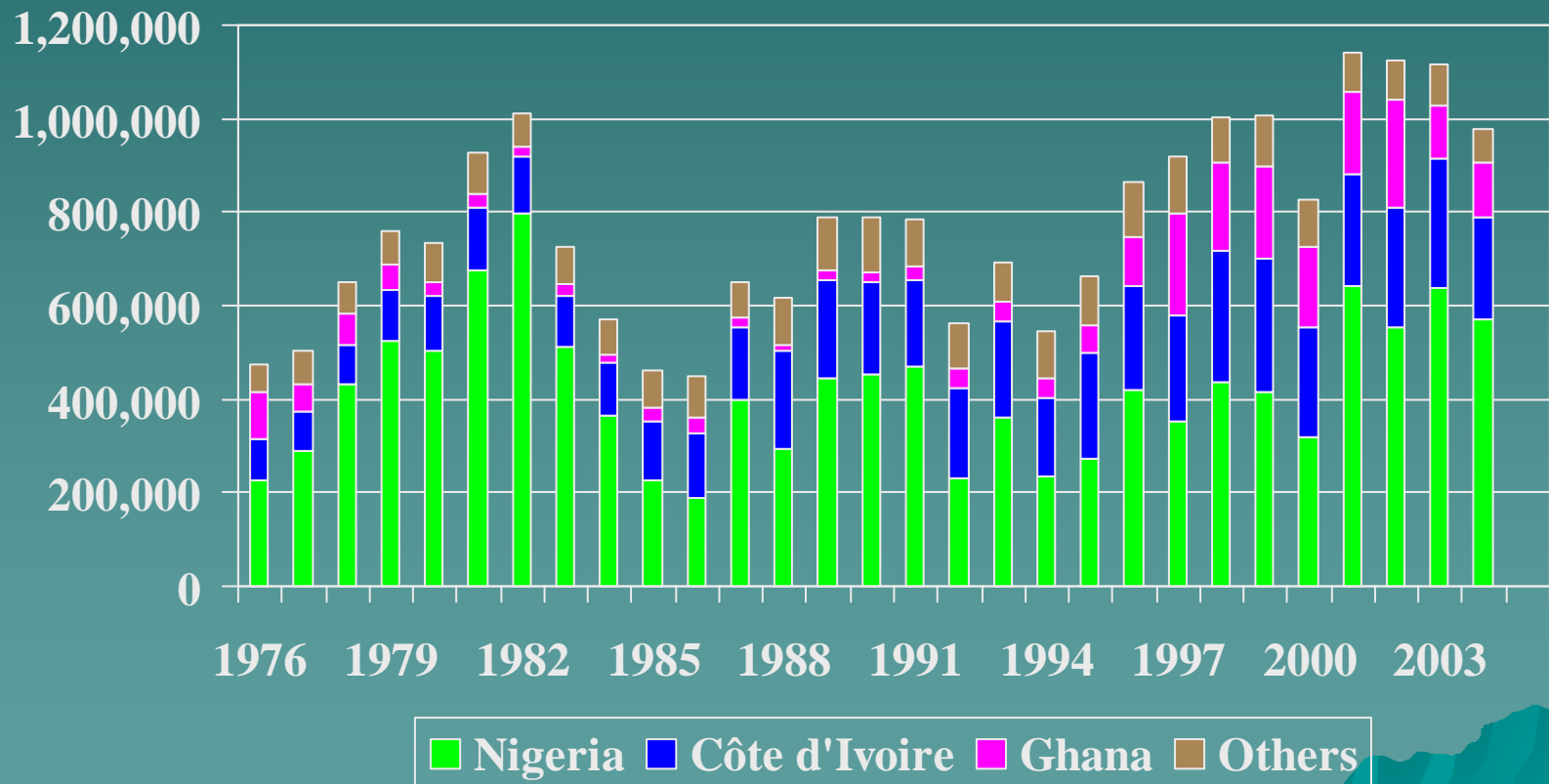
# ECOWAS FISH AND FISHERY PRODUCT EXPORTS - TONNES-



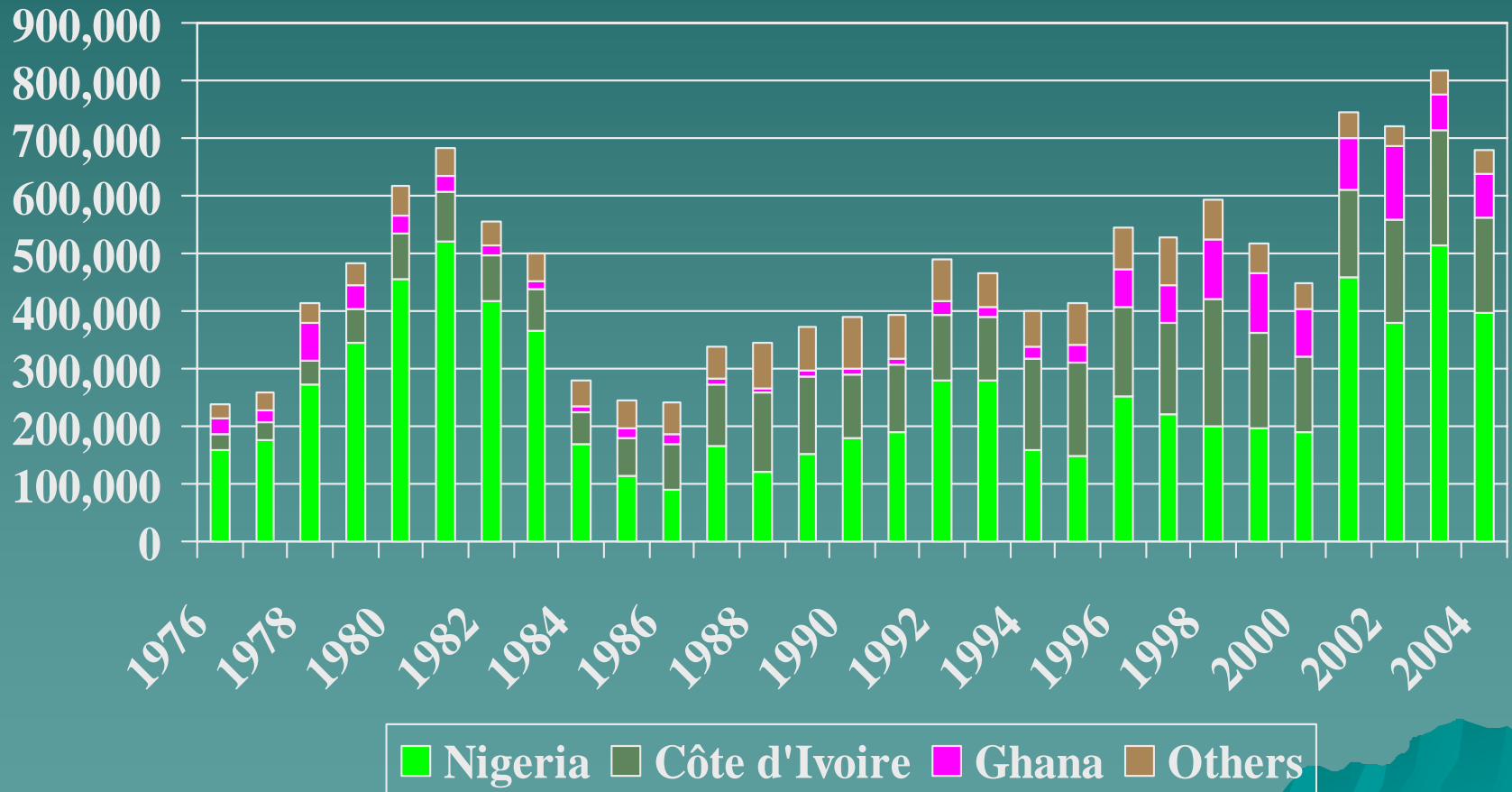
# ECOWAS FISH AND FISHERY PRODUCT EXPORTS - 1,000 USD -



# ECOWAS FISH AND FISHERY PRODUCT IMPORTS - TONNES-



# WEST AFRICAN FISH AND FISHERY PRODUCT IMPORTS - 1,000 USD- 2004



# MAIN FISH TRADE CHANNEL IN ECOWAS

- Ghana to Togo and Benin for smoked sardinella / anchovy and cured fresh water
- Côte d'Ivoire to Burkina Faso for smoked sardinella
- Sierra Leone to Guinea for smoked bonga and sardinella
- The Gambia to Guinea and Senegal for smoked bonga and skates

# MAIN FISH TRADE CHANNEL IN ECOWAS

- The Gambia to Ghana for dried shark products
- Mali to Burkina Faso/RCI/Niger/Nigeria for cured freshwater fish
- Senegal to Cameroon, Congo, Gabon, Ghana, Côte d'Ivoire, Guinea, Nigeria, Togo, Benin,, Democratic R Congo, Mali for smoked/dried salted marine fish
- Benin to Nigeria for smoked catfish and bonga

# OBSTACLES TO THE DEVELOPMENT FISH TRADE IN ECOWAS

- ◆ Lack of cold storage facilities leads to traditional curing methods
  - ◆ 70% of fish consumed are cured
  - ◆ Senegal 36% of landings cured
  - ◆ RCI 80% of production smoked
  - ◆ Growing regional trade because improved cooperation among countries
  - ◆ Regional market for pelagic at least 800,000 mt

# OBSTACLES TO THE DEVELOPMENT FISH TRADE IN ECOWAS

- ◆ Lack of infrastructure
- ◆ Lack of cargo vessels
- ◆ Lack of information
- ◆ Political and civil unrest
- ◆ Economic situation
- ◆ Lack of appropriate knowledge on WTO Agreements SPS, TBT ; DOHA Round; EPA; FPA

# MAJOR OBSTACLES TO TRADE EXPANSION IN WEST AFRICA

- ◆ Lack of appropriate credit schemes
- ◆ Ineffective National and Regional Policies
- ◆ Tariff barriers and non tariff barriers
  - ◆ Corruption
  - ◆ Quality assurance
  - ◆ Taxes and import duties
  - ◆ Lack of implementation of harmonized liberal trade policies

# IMPROVING FOR BETTER TRADE IN ECOWAS

- Adoption of the CCRF and sustainable fisheries management, marketing and utilization of fish products; use of selective fishing gears
- Improvement of infrastructures (landing sites, roads and communication networks, processing sites)
- Improvement of fish inspection services, prerequisite for good and safer fish, trade information link
- Improvement of statistical data collection and market information services such INFOPECHE

# IMPROVING FOR BETTER TRADE IN ECOWAS

- Awareness campaigns, education, training and information of the social economic importance of the sector will help to improve its performance and to strengthen livelihoods
- Harmonized monetary system and common management of institutions

# CONCLUSIONS AND RECOMMENDATIONS

- ◆ Aquaculture increases total supply
- ◆ China # 1 producer & exporter (# 6 importer)
- ◆ Fish trade is expanding (2004: value + 12.7 %)
- ◆ Developing countries: 50 % share of exports (stable)
- ◆ Japan, US, EU: 75 % of imports (declining)

# CONCLUSIONS AND RECOMMENDATIONS FOR ECOWAS

To strengthen an increase intra-regional trade by stimulating sustainable fisheries management and trade development, the following measures should be undertaken:

- ◆ Training on WTO agreements SPS, TBT and Doha round, EPA, FPA
- ◆ Improvement of statistical data collection
- ◆ Organizing market surveys

# CONCLUSIONS AND RECOMMENDATIONS FOR ECOWAS

To strengthen an increase intra-regional trade by stimulating sustainable fisheries management and trade development, the following measures should be undertaken:

- ◆ Regular organization of buyers and sellers and seminars on trade opportunities
- ◆ strengthening the regional trade information network
- ◆ Implementing liberal trade policies e.g. the UEMOA TEC and the ECOWAS trade program.

# THE END

◆ THANK YOU

