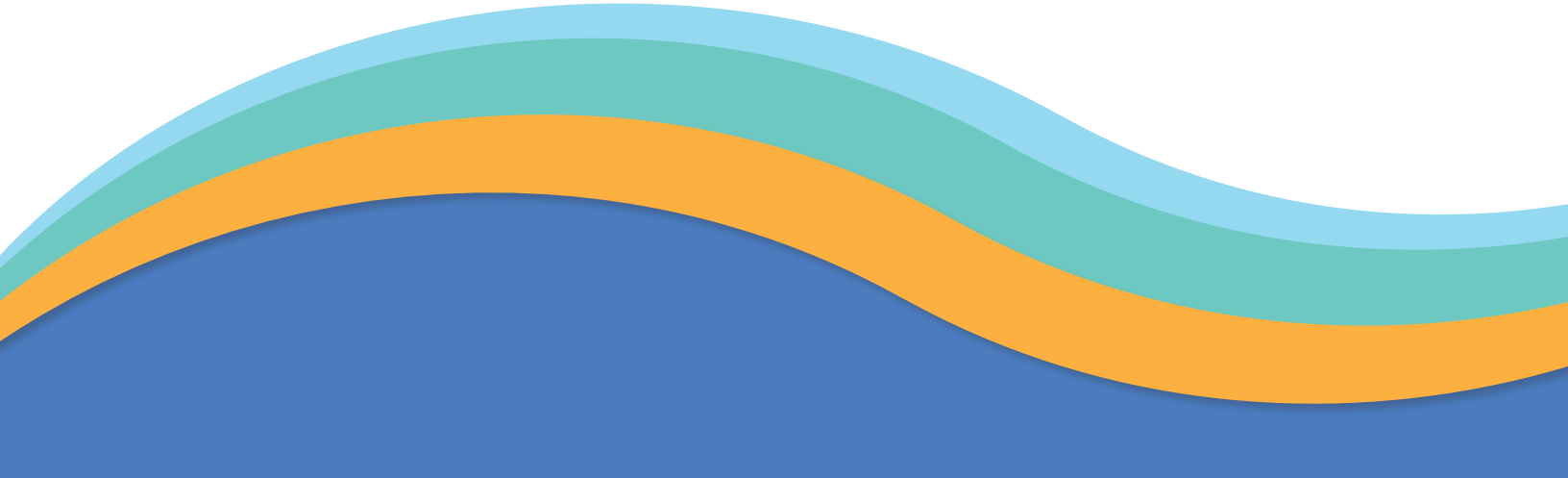




Africa  
Program  
for  
Fisheries

# Improving Livelihoods and Creating Wealth through Sustainable Fisheries



# Improving Livelihoods and Creating Wealth Through Sustainable Fisheries and Aquaculture in Africa

**Africa can leverage its rich marine and freshwater resource endowments and maximize sustainable and inclusive growth by investing in improved management systems and appropriate infrastructure.** By 2030, global fish demand, driven by growing population and income, is expected to rise by 40 million tons, and to consistently continue growing over the coming decades. As described in the Policy Framework and Reform Strategy for Fisheries and Aquaculture in Africa prepared in May 2014 by the African Union NEPAD, there is a strong opportunity for Africa to play a crucial role in the sector. This will be done in two ways: through

- capture fisheries with improved management systems and enhanced value chains; and
- investments in sustainable aquaculture that would enable to meet regional and global shortfalls in food fish supply, and capitalize on the expected higher seafood prices.

**Fisheries already play a significant social and nutritional role in Africa.** The sector represents a key social safety net, contributes to food and nutrition security, and provides jobs, in particular for rural coastal populations, which are among the poorest and most vulnerable. On average, fish and fish products account for 18% of animal protein intake by African consumers, and the sector provides employment to over 12 million people (58% in the fishing and 42% in the processing sector). While fishing jobs are almost entirely taken by men, 59% of the processing work is done by women. Although systematic estimates are not available, employment multiplier effects are remarkable: for example, for every fisherman job, 1.04 additional onshore-job is created in Mauritania, while this ratio reaches 3.15 in Guinea, illustrating the potential for further job creation through value chain development.

**Currently, fisheries and aquaculture directly contribute \$24 billion to the African economy, representing 1.3% of the total African GDP in 2011.** GDP figures, however, under-represent the contribution of fisheries. First because GDP only captures the

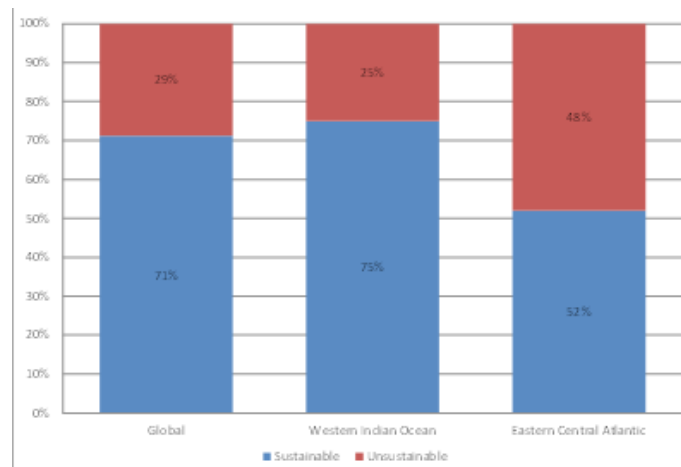


Figure 1 – Status of fish exploitation  
Source: SOFIA 2014, FAO

sector's contribution at the production level, not the multiplier effects on the economy and the contribution from foreign vessels' activities which can be significant. In 2009, e.g., fisheries' direct contribution to Seychelles' GDP was estimated at 0.7% while if multiplier effects are taken into account, this contribution would raise to at least 7.9%. Second, an increase in GDP could be obtained by augmenting fishing activities which can result in the long term in decreased resource productivity, and subsequently the sector one. Increases in sector GDP or in employment should be complemented by indicators illustrating the sector's social, economic and environmental sustainability, such as the state of fish stocks, long-term profitability, revenue distribution, and good governance.

**Over the past decades, Africa's capture fisheries' production has grown rapidly.** To maintain the sector's productivity, it is crucial to reinforce its governance and management. Simply put, capture fisheries in Africa face the familiar problem of managing a common property and renewable resource – too many boats and too many fishers chasing too few fish. The consequence is biological degradation of fish resources (fig. 1), and substantial economic loss. Globally, capture fisheries' catches stagnate at about 93 million tons per year (fig. 2), and gains in fishing production and economic benefits are only expected through improved

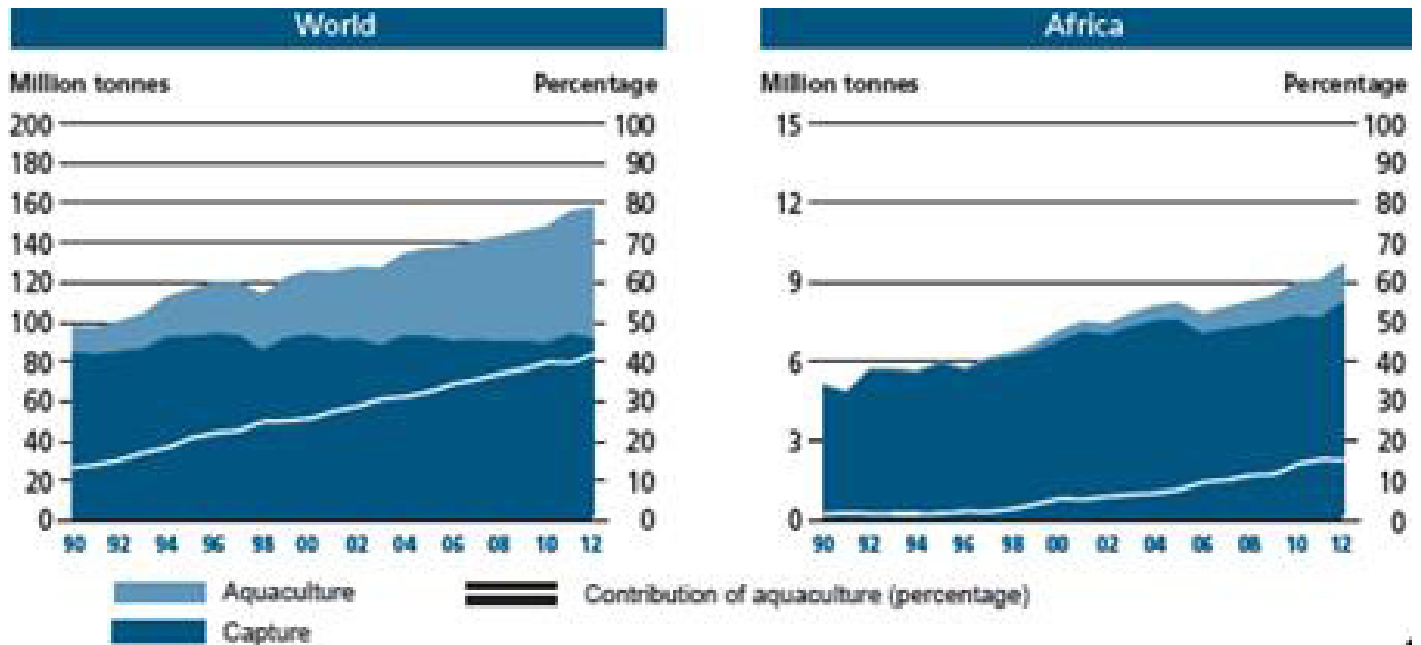


Figure 2 - Fish and Aquaculture Supply: World and Africa, 1990-2012  
Source: SOFIA 2014, FAO

management and governance. At the global level, the economic loss from poor fisheries governance and management amounts to \$50-100 billion each year. As African fisheries production continues to increase, attention is needed to avoid overexploitation, which in turn would decrease productivity and socio-economic benefits as observed elsewhere in the world.

**Currently Africa represents a small share of the global fisheries and aquaculture sector, producing just above 9 million tons annually, or 5% of global production.** It suffers from supply deficit, and depends on imports. Due to the fast increase in population and per-capita income, demand for fish and seafood in the region is expected to increase by 30% by 2030. If no action is taken, the gap will likely be filled by imports, causing a toll on foreign exchange. The ratio of import to fish consumption in sub-Saharan Africa is estimated to rise from 4% in 2000 to nearly 34% in 2030. Again, if no action is taken, per-capita fish consumption in sub-Saharan Africa is projected to decline at an annual rate of 1 percent or 5.6 kilograms by 2030, impacting food security and nutrition.

**Aquaculture is the fastest growing food-producing sector that could help meet increasing demand and future supply gap.** Between 1990 and 2011, the global aquaculture production grew at an annual average rate of 7.8% (fig. 2) - compared to 0.9% for beef, 2.1% for pork, 4.5% for poultry, and 1.4% for cereals. Aquaculture production is expected to increase from 57.8 million

tons in 2010 to 93.6 million tons in 2030, and therefore represents a key instrument to meet the fish supply gap. In the 2000-2012 period, African aquaculture was among the fastest growing at global level (11.7% per year on average). If adequate conditions are created, the industry could have the potential to catch up on the development delays observed in previous decades (fig. 2).

**Sustainable aquaculture and improved fisheries management and governance could make the sector become a highly profitable economic enterprise, able to support the economic and social development of Africa.** With rising global demand for seafood, the potential profits in this sector will be high over the next few decades, and aquaculture will play an important role in meeting the escalating global and regional demand. This clearly opens a wide window of opportunity for Africa to take. The World Bank estimates that improved fisheries governance and resource management could generate at least an additional \$2-4 billion per year in sustainable benefits. Additional multiplier effects and impact on employment could be brought through value chain development. A sustainable and inclusive development of the fisheries sector requires good governance, transparency, and accountability in the form of reliable contracts and access allocation. Together, these will support shared prosperity by avoiding rent-seeking, transfer-pricing practices, corruption and illegal fishing.

**Africa is now at a crossroads to determine the future of its fisheries and aquaculture sector.** Under a “business as usual” scenario, the fisheries sector would continue to generate low profits or losses. This undermines its macroeconomic contribution, even if it remains an important source of job creation and improved livelihoods. Another future is possible for the sector. One where, under countries and regional leadership, growth and job creation would spur from greater fish resources management, fisheries value chain development, better governance, adequate benefit sharing, investments in suitable infrastructure and sustainable aquaculture.

**The World Bank supports African nations in their commitment to invest in sustainable fisheries and aquaculture, as they represent crucial means to promote inclusive growth and end extreme poverty.**

The West Africa Regional Fisheries Program (WARFP), covering coastal West Africa from Mauritania to Ghana, has invested \$158 million over the past six years with an additional \$70 million in the pipeline. The South West Indian Ocean Fisheries Governance and Shared Growth Program (SWIOFish), covering East Africa and neighboring island countries, will start with a first investment of \$91 million and has \$95 million in the pipeline. Other programs such as the Global Program on Fisheries (PROFISH), a multi-donor trust fund, and a “readiness facility” under planning, also provide resources for project development and implementation, as well as knowledge creation in sustainable fisheries and aquaculture. The World Bank remains eager to further support countries’ agenda to develop sustainable and inclusive fisheries and seafood value chains.

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### Selected World Bank Publications – Africa Specific

1994	Islamic Republic of Mauritania Fisheries Sector Review	2009	Seychelles Competitiveness of the Tuna Cannery
1998	Integrated Coastal Zone Management Strategy for Ghana	2010	Mauritania Policy Note
2003	Mauritania Fisheries DTIS	2010	Republic of Seychelles: Technical Assistance for Tuna Industry Management
2004	Guinea Bissau Fisheries Sector Strategy	2011	Cameroon Sustainable Fisheries Sector Strategy
2005	Senegal Fisheries Sector Strategy	2011	Implementation Strategy to Prepare for the Management of coral Reefs in the Western Indian Ocean for Climate Change
2005	Ghana Natural Resource Management Study	2012	Côte d’Ivoire – The Growth Agenda: Building on Natural Resources and Exports
2005	Study of the Costs of Compliance with Export Standards in the Senegalese Fisheries Industry	2012	Cameroon – Summary Report of the Economic and Sector Work in the Fisheries Sector
2007	South Africa Economic Contribution of Fisheries	2013	Comoros Policy Notes including fisheries
2007	Sierra Leone Sustainable Fisheries Sector Strategy	2014	Madagascar Policy Notes including environment, natural resources and fisheries
2008	Liberia: Diagnostic Trade Integration Study – Fisheries	2015	Mozambique Fisheries Policy Notes & Economic Model
2008	Mauritania Sustainable Fisheries Strategy	2015	Economic, Social and Environmental Evaluation of African Small-Scale Fisheries
2008	Cape Verde Fisheries Sector Strategy Assessment	2015	Madagascar Fisheries : Diagnostic Study of the Commerce Integration – DTIS
2009	Madagascar Fisheries Strategic Note		
2009	Fisheries in Zambia: an undervalued contribution to poverty reduction		
2009	South West Indian Ocean WIOFish database		

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#### Contacts:

Bérengère Prince  
(202) 473-0536  
bprince@worldbank.org

Xavier Vincent  
(202) 473-2426  
xvincent@worldbank.org