Enhancing Fisheries and Aquaculture Sector Investments to Achieve Agenda 2063 Aspirations

Executive summary

This policy brief provides a perspective on the extent to which Africa's current fisheries policies, programmes and institutions are fit-for-purpose to deliver on the African Union's Agenda 2063 goals, objectives and actions. The analysis is based on is the results of three Foresight Studies. which examined progress in the areas of Climate Change Adaptation, African Fish Supply and Food Security as well as Gender Mainstreaming. This policy note was prepared in collaboration with the members of Policy, Governance and Institutions Working Group of the African Fisheries Reform Mechanism (AFRM).

The studies represent the commitment of the African Union to reforming the fisheries and aquaculture sectors to achieve the African Union Agenda 2063 Aspirations. The studies were supported by the Phase Two of the Fisheries Governance Project (FishGov2 Project) funded by the European Union. They align with the definition of foresight as "the discipline of exploring, anticipating, and informing today's decision-making process to shaping the future".

Context and Rationale

The African fisheries and aquaculture sector plays a vital role in providing a healthy supply of food to local, national and international markets. However, this sector faces increasing institutional challenges including distorted policies, poor governance, under-funding, climate change, biodiversity loss, economic uncertainties, and geopolitical differences. These realities underline the need for a forward-looking approach to ensure the long-term future of fisheries and the underdeveloped aquaculture sector.

This policy brief presents a foresight of the strengths, weaknesses and opportunities the sector may face in the future.

PREAMBLE/ APPROACH

Foresight studies involve looking forward and projecting development trajectories based on the present conditions and trends. These can then be aligned with the African Union goals and aspirations, such as the Agenda 2063 and associated strategies, plans, policies and mechanisms to evaluate whether the process is on track. This diagnostic analysis identifies new frontiers, questions and objectives for modified (or additional) actions to keep African Member States on track to meet the Agenda 2063 Aspirations.

Foresight studies are thus not about the future, they are about present actions required, so that in years to come when we look back, we will see that they were necessary and rational interventions.

The evidence from the Foresight study analyses interrogate:

1. Fitness-for-purpose of our policies and institutions. Are they 'fit-for-purpose' to guide us to our Agenda 2063 aspirations? For example, are the traditional top-down fishery departments and regulatory focused institutional arrangements fit for the purpose for leading a Blue Economy strategy requiring participatory partnerships with value chain players, financial institutions and other actors?
2. 'Fitness-of- purpose' of our institutions and programmes. For example, is an AU Centre of Excellence capacitated to be 'fit-for-purpose' to deliver what is expected by the AU capacity building mandate?



3. Identify issues and gaps in policy, institutions and strategies requiring review to meet Agenda 2063 aspirations.

PROBLEM ANALYSIS

1. Fish Supply and Food Security

The African fish production sector is underperforming

a. African fish production is not meeting demand and food security needs of the African continent: although Africa has a rich endowment of productive waters with the capacity to meet food security requirements, the continent is not producing enough fish to keep up with its own demand. This is reflected in Africa's fish trade deficit: fish trade data highlights the export of low quantities of high value fish products in exchange for large quantities of low value fish products through import.
b. Low rate of fish processing: compared to the rest of the world, a relatively small proportion of fish produced is converted into processed products with added value that go into the formal fish trade.
c. High post-harvest loss: a large proportion (ca. 40%) of landed fish is lost post-harvest due to poor infrastructure and related issues.
d. High levels of Illegal, Unregulated and Unreported (IUU) fishing: high levels of IUU catches represent a net loss to African member States threatening food security, fisher livelihoods, reducing sector productivity and income, and compromising sustainability of fish stocks.
e. Underdeveloped aquaculture sector: aquaculture development has been slow in Africa despite possessing vast areas suitable for aquaculture fish culture and a growing demand for fish.

2. Climate change

a. Fish production and fisher community livelihoods are highly impacted by climate change: Africa is highly exposed to climate change effects on aquatic ecosystems and fish production. Erratic changes in climate including ad hoc rising and/or cooling temperatures impact on fish habitats and reproduction and feeding grounds of migratory species.
b. Vulnerable fishing communities and the aquaculture sector have few adaptation options such as climate events early warning systems, appropriate fishing fleets, insurance and capacities for alternative livelihoods.
c. Climate change induced population migration: climate change effects are expected to displace people to the cities and coasts placing more pressure on coastal fishery resources as a source of food security.
d. Most African Member States do not have fisheries and aquaculture sectoral adaptation plans for climate change mitigation leaving vulnerable fishing communities with few adaptation options and a low resilience to shocks.
e. Fishery and aquaculture sector adaptation strategies are not well catered for in the carbon-focused mitigation strategies under the Paris Agreement: international funding for climate change does not adequately provide for sustainable fisheries and aquaculture Blue Economy development needs.
f. Lack of climate science to inform the following: -
   i. early warning systems.
   ii. insurance for climate change related hazards for fishing communities and aquaculture.
   iii. integration of climate change data into fisheries management and Blue Economy



sector development planning; and,

iv. education and upskilling of fishers and aquaculture farmers for more diversified value chain opportunities.

3. Gender Mainstreaming

a. Pervasive inequalities in the value chain: in many African States, women do not have equal access to decent employment and income in the fisheries and aquaculture sector.

b. Informal sector vulnerability: Gender-based inequalities constrain the agency of informal women fish traders as value chain actors. Women traders often lack ownership of tenure of physical land and facilities, access to finance and credit to build their business infrastructure, representation on decision making institutions, and are often subject to regulations (e.g. selling undersize fish, compliance with border controls) which tend to exclude them from value chain development. This exposes women to gender-based exploitation and violence such as sex-for-fish coercion or corrupt practices by officials.

c. Lack of empowerment of women, mainly at national chapters in the framework of associations and cooperatives.

KEY UNDERLYING ISSUES

1. Why is Africa not producing enough fish to meet its requirements?

a. Weak fishery and aquaculture sector governance. Pervasive fisheries and aquaculture sector institutional weakness, poor fishing fleets and infrastructure (for fish landing and handling), lack of capacity and under-resourcing are resulting in a massive loss in potential economic benefit, food security and welfare gains which could support rural livelihoods and promote climate change resilience.

b. The fishery sector is undervalued and hence under-resourced. Firstly, a large proportion of fish landed (mainly by small-scale fishing vessels) is not recorded in the GDP of many member States resulting in economic undervaluation. Secondly, fish production generates very high food security benefits, supports high numbers of rural livelihoods and acts as a social safety net when other livelihoods fail. Subsequently, the value to society of the fisheries and aquaculture sector contribution to food, nutritional security, and welfare gains is not properly recognised in national plans and budgets.

c. Underinvestment in fisheries and aquaculture institutional capacity, education, and infrastructure (Scale of Actions). Despite good progress with harmonised AU fisheries policies, regional institutional building (RECs and RFMOs) and implementation projects (e.g. support to women fish traders, training of member States, Blue Economy strategies), AU member states are not on track to achieve sustainable and productive fishery and aquaculture value chains as required by the PFRS. The basic protocols for sustainable fisheries are not being fulfilled in most AU member States resulting in low fishery landings and the implementation of a Blue Economy value chain approach for fisheries and aquaculture needs to be supported and activated.



2. Lack of fisheries and aquaculture sector specific climate adaptation plans at member State level: The lack of fishery and aquaculture sector specific adaptation plans is of great concern as the sector is fully exposed to climate change impacts. In the absence of climate change adaptation plans integrated into fisheries and aquaculture resource management and Blue Economy strategies, the fishery and aquaculture production will be destabilised, associated livelihoods will be lost, and social instability will be exacerbated.

3. Underinvestment in education to prepare the coming 'demographic wave' of young people entering the working age population to raise sectoral productivity:

4. The African population increase necessitates a huge increase in fish production to meet food security requirements to meet Agenda 2063 goals. This can only be achieved if there is a concomitant investment in education and institutional capacity building. The millions of working age people about to enter the working population present a potential 'window-of-opportunity' to increase per capita sectoral productivity. However, current education and institutional capacity building is not appropriate. Therefore, Africa risks missing the opportunity to reap the benefits of this 'demographic transition' over the next 20 years if the necessary coherent and resourced fishery and aquaculture education plans are not put in place as a matter of urgency.

5. African Continent Free Trade Agreement (ACFTA) has the potential to increase the inequalities experienced by women in the informal fisheries sector. The expected formalisation of fisheries and aquaculture value chains combined with the promotion of intra-African fish trade will favour formal businesses that have the capacity, networks and resources to comply with the regulatory frameworks, access investment and markets. Unless specific interventions are launched to include and empower informal women fish traders in the wealth that will be generated in the value chain, the inequities they experience will be increased and they will become further marginalised.

POLICY RECOMMENDATIONS

1. Increase African fish production by means of better resource management, value chain development, climate change adaptation, Blue Economy strategies and gender mainstreaming. This goal is within the agency of member States because Africa has a rich endowment of productive waters for both fisheries and aquaculture. Key strategies include improving institutional capacity for sustainable fisheries governance, reducing IUU, reducing post-harvest losses and growing the aquaculture sector.

2. Foreground fisheries and aquaculture education and capacity building.

   The fitness-for-purpose of existing courses in fisheries and aquaculture education need urgent review and repurposed to meet the sectoral requirements for a Blue Economy value chain development approach to the sector.

   The pervasive fisheries and aquaculture institutional capacity weakness, and the need to grow fisheries production through value chain development speaks to the need for a comprehensive



education and institutional capacity building initiative. Aquaculture development programmes and projects tend to focus on technical assistance and training, which are short-term interventions. Training enables the beneficiaries to carry out specific technical functions. Education is a longer term, empowering higher-level skills such as critical thinking, analysis, evaluation and decision making, thereby empowering productive careers in the sector.

3. Climate Change Impact Mitigation must form part of fisheries and aquaculture and Blue Economy development strategies

   There is an urgent planning need to prepare the fishery sector and vulnerable fishing communities to adapt to climate change impacts through interventions such as early warning systems, rebuilding resources and restoring fisheries, aquaculture development, value chain diversification and upskilling populations for more diversified livelihoods.

4. Increase the scale of institutional and governance reforms. The pervasive fisheries and aquaculture sector governance and institutional weakness requires a review to inform a comprehensive 'sector planning' operational approach to national fisheries and aquaculture policies which are informed by the PFRS for the achievement of Agenda 2063 outcomes. A 'war-room' style integrated planning and implementation process is required necessitating enhanced implementation capacity within AU, regional and member States. A coordinated quantum leap in implementation actions at all levels is required to achieve the AU Agenda 2063, PFRS, and Blue Economy policy goals.

5. Include Women in Fisheries Value Chain Development

   A programme of specific empowering actions is required to ensure that women fish producers, processors and traders are included in the formalisation of the fisheries value chain and the benefits generated through the African Continent Free Trade Agreement. In consonance with this there is also the need to develop A Continental Strategy for Gender Mainstreaming in Fisheries Development Programmes and Aquaculture Management in Africa.

6. Implement Public Private Partnership (PPP) Programmes for Fisheries and Aquaculture in Africa

   There is the need to embrace and implement the existing continental guide on PPP for Fisheries and Aquaculture in Africa particularly in relation to the specific practical approaches to private sector involvement in relation to the status of each RECs and MS.It is therefore recommended to take forward this process, as expeditiously as possible, with a view to obtaining the reforms foreseen in the proposed Guide including to:
   a. Develop a generic Regional and National Public Private Partnership (PPP) Development Policy and Strategy for RECs and MS,
   b. Raise awareness and stakeholders' engagement on the regulatory changes as regards PPP and public Investments in Fisheries and Aquaculture using community-based organizations,

c. Establish a Common global (generic) template for Public Sector interventions and the Private Sector involvement in fisheries and aquaculture investments activities especially for the Small and Medium Entrepreneurs.
d. leveraging public-private partnerships through mainstreaming fisheries and aquaculture into the National Agricultural Investment Plans (NAIPs) to attract investment, with the goal of enhancing food security in line with CAADP Kampala commitments,

CONCLUSION

Obtaining the full societal value from the fisheries and aquaculture sectors, governance reform and a major institutional capacity building process is required. The foresight studies identified climate impacts and the coming demographic wave of young people entering the sector as critical issues which can either be a threat or opportunity to sectoral productivity and livelihoods. AU Member States can increase fish production and productivity in value, and thereby create economic growth, productive job opportunities for young people entering the workforce, promote the equitable participation of women in value chain development, and mitigate the impacts of climate change.



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