



AFRICAN UNION
INTERAFRICAN BUREAU
FOR ANIMAL RESOURCES

DEVELOPMENT OF UPSTREAM AND DOWNSTREAM ACTIVITIES IN THE FISHERIES VALUE CHAIN

African Union



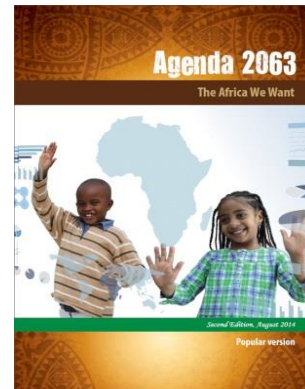
Africa Blue Economy Strategy

AU-IBAR PRESENTATION

by

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Conference on "Unlocking the full potential of the fisheries sector within the framework of a sustainable blue economy"



PRESENTATION OUTLINE

1. **Africa Blue Economy Strategy (ABES)**
2. **AU vision, ABES vision and purpose**
3. **Five thematic areas in ABES**
4. **Blue economy sectors value addition and value of services**
5. **Employment by BE sectors and components**
6. **Capture Fisheries**
7. **Aquaculture**
8. **Ocean based activities**
9. **Capture fisheries value chain**
10. **Recommendations**





AU Vision, ABES Vision and Purpose

Agenda 2063 - The strategic framework for the socio-economic transformation of the continent over the next 50 years refers specifically to the **Blue and Ocean Economy as the Goal 6 for accelerated economic growth**

PFRS - The document provides guidance to transition of African fisheries to productivity, sustainability and profitability with options for enhanced regional collaborative management of shared resources:
Key policy arena: e.g. High seas fisheries, small scale fisheries, sustainable aquaculture development and fish trade and marketing

ABES Vision

- *an inclusive and sustainable blue economy that significantly contributes to Africa's transformation and growth*

Purpose of the African BE strategy

- *to guide the development of an inclusive and sustainable blue economy that becomes a significant contributor to continental transformation and growth, through advancing knowledge on marine and aquatic biotechnology, environmental sustainability, the growth of an Africa-wide shipping industry, the development of sea, river and lake transport and fishing; and exploitation and beneficiation of deep sea mineral and other resources.*



Five Thematic Areas in ABES

- 1. Fisheries, aquaculture, conservation and sustainable aquatic ecosystems**
 - SO: To achieve full wealth generating potential for fisheries and aquaculture sector to optimally contribute to the blue growth
 - Promote inclusive blue value chain incorporating fisheries sustainable aquaculture, ornamental fisheries and tourism sector
- 2. Shipping/transportation, trade, ports, maritime security, safety and enforcement**
- 3. Coastal and maritime tourism, climate change, resilience, environment, infrastructure**
- 4. Sustainable energy and mineral resources and innovative industries**
- 5. Policies, institutional and governance, employment, job creation and poverty eradication, innovative financing**
 - Goal 2: To have the African BE accelerates the Economics Transformation
 - 2.1. To assist MS and RECs to mainstream integrated strategies for sustainable and inclusive BE with focus on value chain enhancement



Value added of BE Sectors and Value of BE components (2018 to 2063)

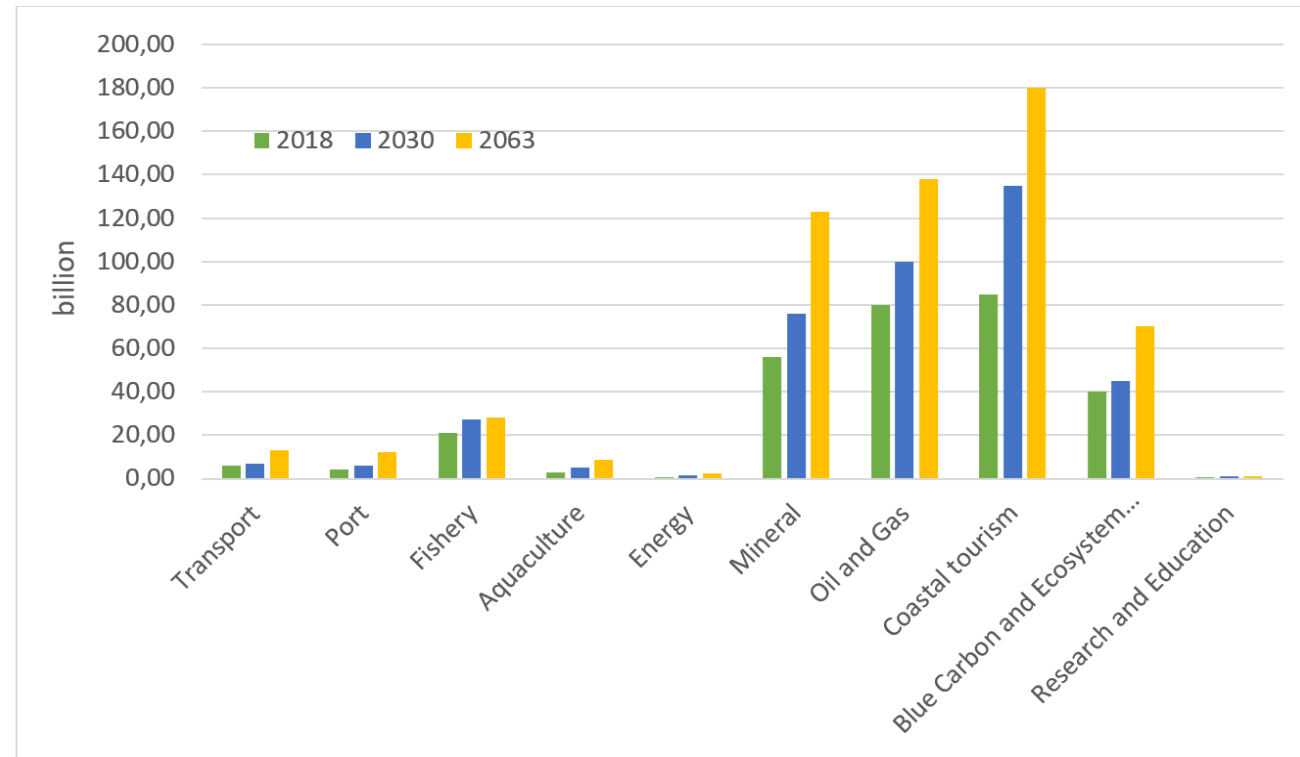


Figure 1 : value created by BE sectors (value added) and components (value of services)

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.



EMPLOYMENT (2018 to 2063)

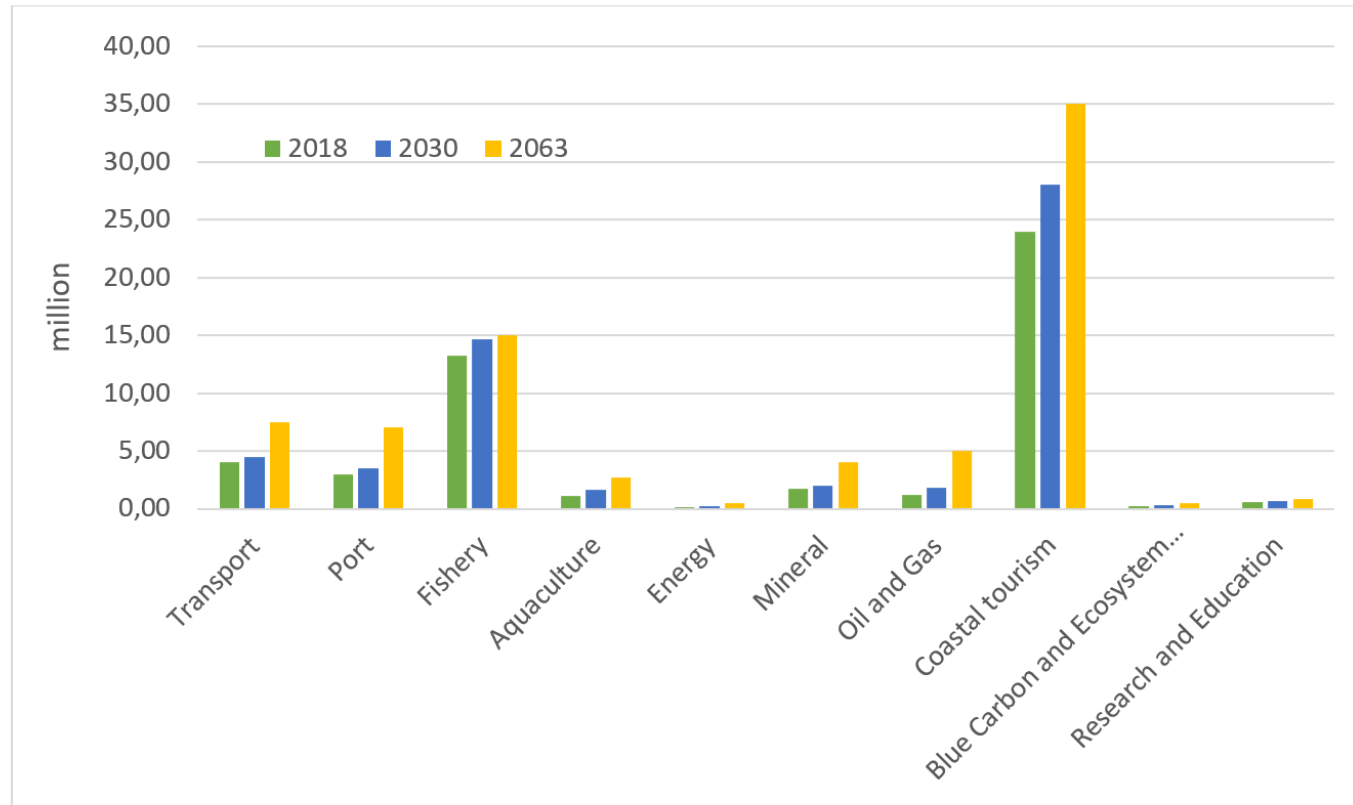


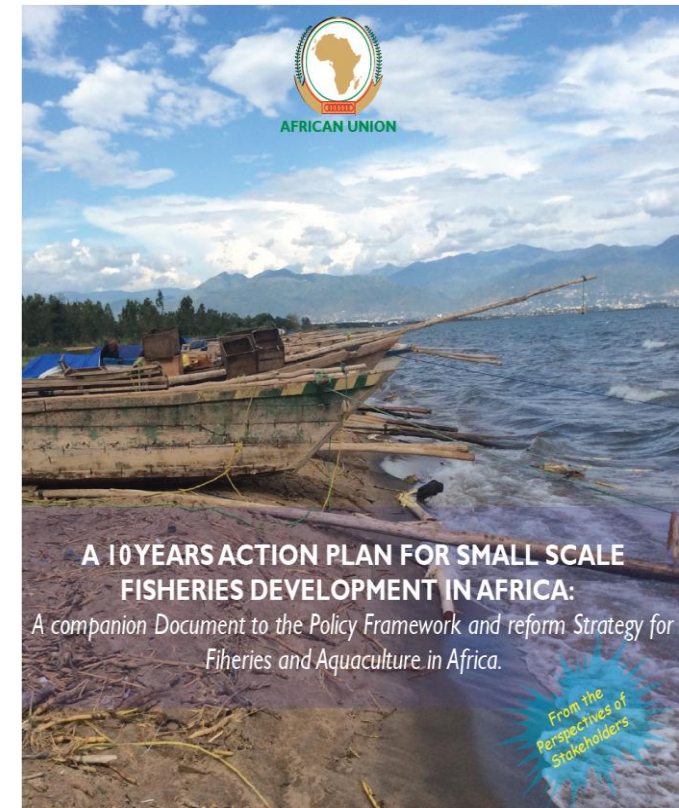
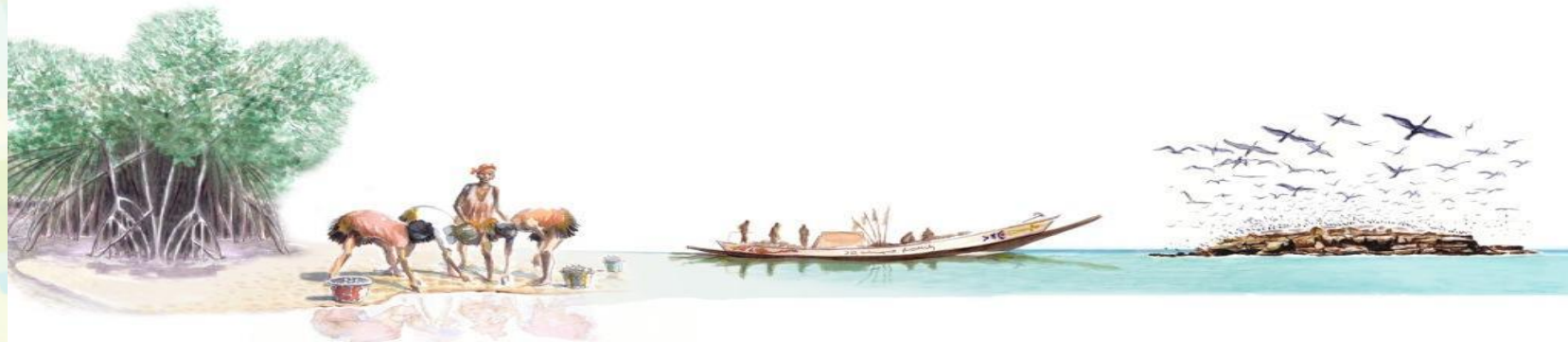
Figure 2 : employment generated by BE sectors and components

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.



CAPTURE FISHERIES

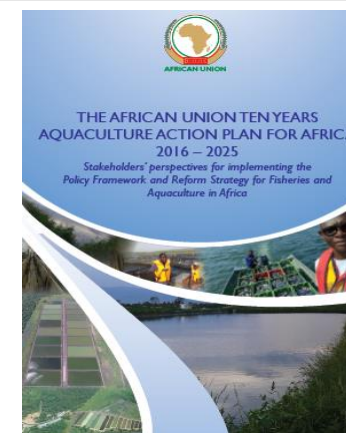
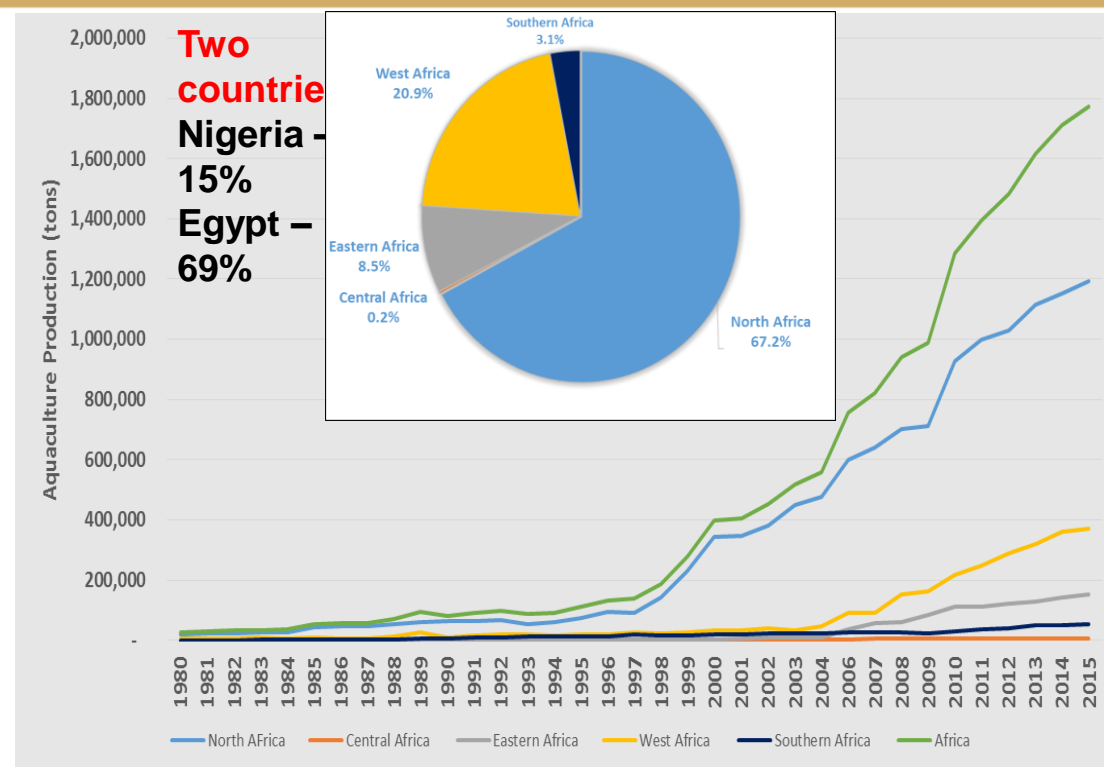
- Capture fisheries production= 10 million tonnes, is expected to remain fairly constant throughout 2063 due to, overfishing, overcapacity and poor governance.
- Total gross value-added of the fisheries = USD 21 billion or 1.26% of the GDP (USD 1.9 trillion) of all African countries.
 - Marine artisanal fisheries contribute the most at USD 8.1 billion,
 - marine industrial fisheries = 6.8 billion
 - inland fisheries at USD = 6.3 billion
- 2018 fisheries sector employs ~13 million people
 - 7 million were fishers and 6 million were processors
 - >50% of fishers employed in inland fisheries
 - largest share of processors work in marine artisanal fisheries





AQUACULTURE

- Aquaculture production in Africa is exceeding 2 million tonnes
- valued at nearly 3 billion USD
- employing 1.2 million people
- Approx. 3% of global production and accounts for 20% of the continents fish supply with a relative annual aquaculture growth of 10% p/a
- Per capita consumption in Africa was averaged at 12.6kg per capita half of the global consumption standing at 24.4kg/per capita.





OCEAN BASED ACTIVITIES

Table 2.1 Established and emerging ocean-based activities

Established	Emerging
Capture fisheries	Marine aquaculture
Seafood processing	Deep- and ultra-deep water oil and gas
Shipping	Offshore wind energy
Ports	Ocean renewable energy
Shipbuilding and repair	Marine and seabed mining
Offshore oil and gas (shallow water)	Maritime safety and surveillance
Marine manufacturing and construction	Marine biotechnology
Maritime and coastal tourism	High-tech marine products and services
Marine business services	Others
Marine R&D and education	
Dredging	

Source: OECD 2016

Copied from Commonwealth Blue Economy Series, No. 1

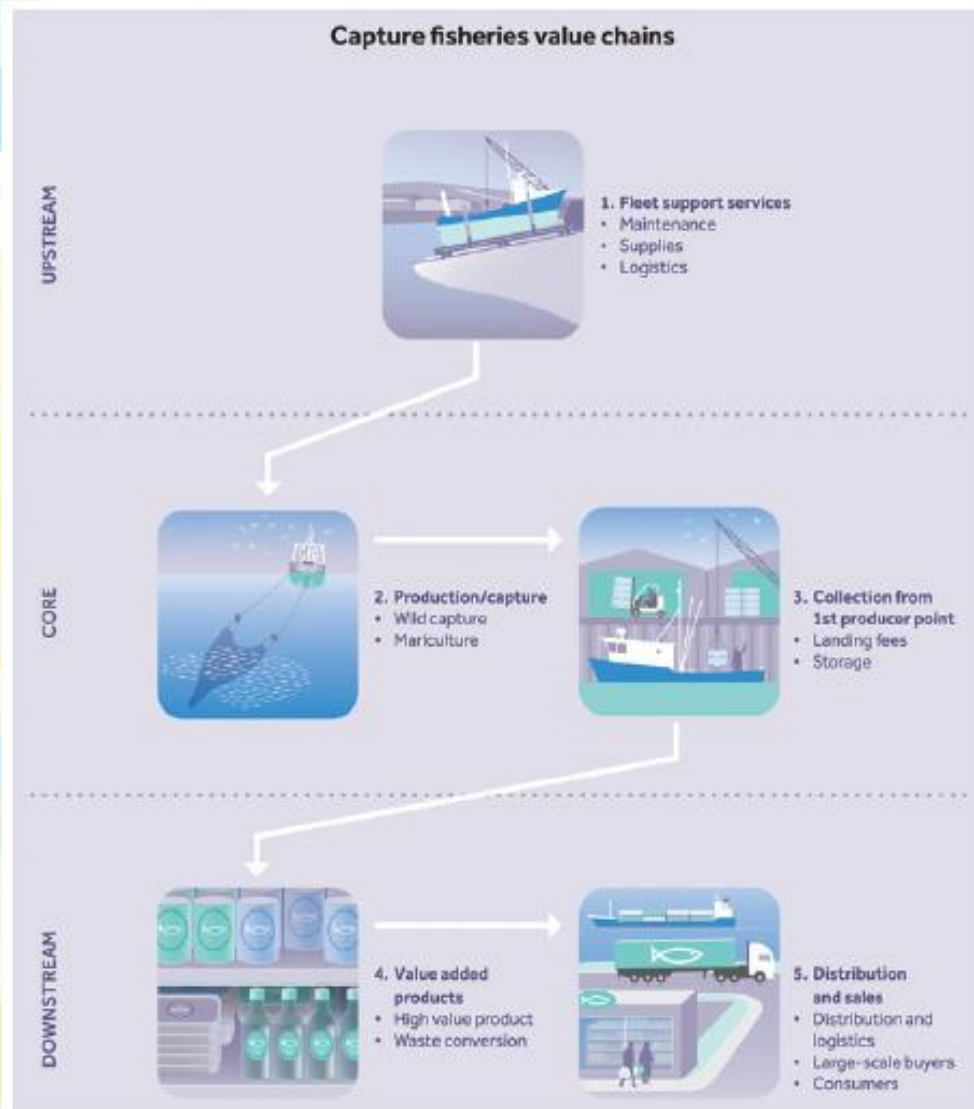


Downstream and upstream activities in VC

- Core sectors and adjacent economic activities (maritime transport ~ shipping ~ value added seaports, shipyards etc)



CAPTURE FISHERIES VALUE CHAIN



- **Vehicle** – new forms of production, technologies, logistics, labour processes and organizational relations and networks are introduced
- **Act as value multiplier** (sig. increase the overall value of BE without sig. increasing pressure on natural resources)
- **Extend to which VC can be extended will determine total value that can be realized from single maritime function or resource**
 - Create needed employment
 - Earnings from foreign currency
 - Promote diversification to expand economic opportunities for the youth/women (i.e. job creation) and reduce production risks and losses across all levels of the value-chain
 - Enhance access emerging markets



RECOMMENDATION FOR STRENGTHENING FISHERIES VALUE CHAIN IN AFRICA

- **Empowering and leveraging women and youth to participate economically in the fish value chain by supporting them to strengthen and enhance the compliance of their fish value chain enterprises to sector best practices, sector and business standards**
- **Identifying and encouraging regional strategic value chain for enhancing regional economic integration, investment, boosting intra-regional trade**
- **Infrastructure investment (harbours, Fish Processing Establishment, freight transportation...) - *Encourage Value addition before export***
 - most AU MS export unprocessed products and raw material (fish, minerals, oil, etc.) that can benefit from being processed
 - support the investments in value-added products to enable optimum profit/ gains from the aquatic and mineral products and
 - Transfer appropriate technology to AU MS to meet the processing, packaging and marketing requirements
- **Tapping into mari-culture business and other emerging ocean activities**

Link to find PFRS, African Blue Economy Strategy and Annexes

The link - <http://repository.au-ibar.org/handle/123456789/1169> (Fisheries, Aquaculture & Blue Economy Documents)

The main document:

[Africa Blue Economy Strategy](#) (English, French, Arabic and Portuguese)

Annexes:

[Annex 1: Fisheries, aquaculture, conservation and sustainable aquatic ecosystems in the context of Africa Blue economy](#) (English, French)

[Annex 2: Shipping/transportation, trade, ports, maritime security, safety and enforcement in the context of Africa Blue Economy](#) (English, French)

[Annex 3: Coastal & Marine Tourism, Climate Resilience, Environment and Infrastructure in the context of Africa Blue economy](#) (English, French)

[Annex 4: Sustainable Energy, Mineral Resources and Innovative Industries in the context of Africa Blue Economy](#) (English, French)

[Annex 5: Policies, Institutional and Governance, Employment, Job creation and Poverty Eradication, Innovative Financing in the Context of Africa Blue Economy](#) (English, French)



THANK YOU

