

**MAJOR FISH EXPORT CHALLENGES
IN THE LAST 20 YEARS AND LESSONS
FOR THE FUTURE FROM A WEST
AFRICAN FISHING NATION, GHANA**

World Seafood Congress

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JESSICA A. NKANSAH

Presentation Outline

- Introduction
- The fishing Industry and Its importance
- Fish Export
- Major Fish Export Challenges
- On-going initiatives
- Lessons for the future

INTRODUCTION: Map of Ghana Showing Fishing Coast-line & Inland Waters



INTRODUCTION

- Ghana, located along the west coast of Africa has a marine coastline of nearly 550 km long, with a total land area of 238,527 km² (i.e. 92,100 sq. miles). The continental shelf is about 24,000 km².
- Ghana's population is about 25.91M as at 2012 (Ghana Statistical Service)
- The Volta River basin (*including Lake Volta, the largest man-made lake in Africa*) dominates the country's river line systems.

THE FISHING INDUSTRY AND ITS IMPORTANCE

- Fishing and its related activities provide a source of livelihood/employment. (about 10% of the economically active population are in this area).
- The fisheries industry contributes 7.3% of the GDP in agriculture. The fisheries industries of Ghana is a major export revenue earning sector.

(Source SRID, May 2011 report)

THE FISHING INDUSTRY AND ITS IMPORTANCE – CONT'D

The Fishing Industry includes:

- **Artisanal** fishing (utilising motorised canoes)
- **Semi industrial** coastal fishing (locally manufactured wooden boats, and equipped with outboard or inboard motors)
- **Industrial**
 - Fishing trawler and shrimper operations
 - Tuna fishing, including foreign operated boats (in partnership with Ghanaians)

THE FISHING INDUSTRY AND ITS IMPORTANCE – CONT'D

- Approximately 90% of marine fish capture is landed by artisanal fishing and 5.6% by Industrial vessels.

FISH EXPORT

- Status of eligible fish exporters
 - 9 active Fish processing establishments
 - 44 vessels,
 - Pending : immediate; 3 establishments and 2 more in the process
- Main species exported the EU
 - From Marine Sources: Yellowfin (*Thunnus Albacarea*), skipjack (*Katsuwonus pelamis*), Bigeye (*Thunnus obesus*) shark (*Mustelus mustelus*), crab (*Chaceon affins*) and other bony fish such as salmonete as well cephalopods.
 - From Inland sources: Tilapia species, *Chrysichthys* spp and *Synodontis* Spp

FISH EXPORT Cont'd

Fish and Seafood Export Trends from 2009-2012

A=Fresh and chilled tuna/ fish, cephalopods, crab, smoked/dried/salted fish, prawns/shrimps/lobster

B= Canned Tuna

(Source GCNet)

PRODU CT	2012		2011		2010		2009	
	Weight /MT	Value/ USD	Weight /MT	Value/ USD	Weight /MT	Value/ USD	Weight /MT	Value/ USD
A	30,692. 074	60,575, 986.	13,399. 945	32,339, 734	26.097. 407	47,761, 091.	30,389. 466	48,121, 317
B	30,134. 3	146,88 7,689.	30,193. 035	220,69 6,705	35,968. 648	116,41 8,648	27,163. 766	110,45 6,915

FISH EXPORT Cont'd

- Product A
 - Between 2009 and 2011 there was a steady decline in the volume of export however in 2012 there was a significant increase.
- Product B
 - lowest volume of canned fish export in 2009
 - 2010 sharp increase
 - 2011, 2012 decreased but stable
- The global economic crunch may have resulted in decreased trade volumes.
- Canned Tuna is the largest commodity exported to the EU
- Volume Frozen/Fresh/chilled fish are the next contributors to the EU export revenue
- Smoked in terms of revenue constitutes 0.1% of total export to the EU (Source GEPA)

MAJOR FISH EXPORT CHALLENGES

1. Activities prior to appointment of a competent authority
2. Challenges arising from FVO audits
3. Involvement of several stakeholders
4. Export to non EU countries
5. Presence of Several landing sites
6. Challenges with Artisanal fishing
7. Export of fish from Aquaculture sources

1. ACTIVITIES PRIOR TO APPOINTMENT OF COMPETENT AUTHORITY

- Ghana Standards Board of the Ministry of trade was appointed the **COMPETENT AUTHORITY** for fish and fishery products in **1998**
- Two government institutions were involved in control of exports and issuance of certificates

PORT HEALTH AUTHORITY	MINISTRY OF FOOD & AGRICULTURE
Export of FFP mainly from industrial vessels.	Export of FFP from airports.

- **PROBLEM:** Establishments and artisanal vessels were not inspected thus there was no control

ACTIVITIES PRIOR TO APPOINTMENT OF COMPETENT AUTHORITY – Cont'd

- After 1998 the number of eligible establishments dropped significantly.
- Vessels were not affected much

Category of Products	Year/Number of exporters		
	1996	1997	2013
Smoked Fish	789	>1000	4
Fishing Vessels	30	40	48
Fresh and Frozen fish	10	15	2
Canned fish	2	2	2

ACTIVITIES PRIOR TO APPOINTMENT OF COMPETENT AUTHORITY – Cont'd

The sector most affected by the appointment of the CA was the smoked fish industry.

- Ability to procure smoked fish from the open market
- Introduction of a new regulation on Smoke levels (benzo-A-pyrene) in 2006
- Introduction of new technology to control levels of smoke during smoking
- From 2010 to date there has only been one alert due to benzo-A-pyrene

(source <https://webgate.ec.europa.eu/rasff-window/restricted>)

2. Challenges arising from FVO Audits

- 4 FVO audits. 2005,2008, 2010 and 2013
- Emphasis of 2013 audit was on traceability
- Areas of interest
 - Turn around time for laboratory reports
 - Use of non EU recommended test methods
 - Lack of facilities for analysis of PAH
 - Incomplete Procedures

3. Involvement of several stakeholders

- Various stakeholders/agencies assigned roles in export chain
- Duplication of information at each step of the export process
- Lack of collaboration between these organizations
- Lack of records/data

4. Export to non EU Countries

- Structures are in place for export to EU
- No structures for other countries
- Formal trade between African countries is barely existent

5. Presence of Several Landing Sites

- Marine coastline and shoreline of Volta Lake provide ample areas for landing/docking.
- Ownership of landing sites is community based.
- Control at landing sites is challenging.

6. Challenges with Artisanal fishing



6. Challenges with Artisanal fishing

- Artisanal canoes are responsible for 74% of fish landings in Ghana(1)
- 11,219 canoes as at 2009 (MFRD 2009 Report)
- Identification of canoes for traceability
- High cost of inputs for the owners make it difficult for requirements to be met(fibre glass, plastic crates/stainless steel trays
- Use of wood in fabrication

ARTISANAL FISHING Cont'd

- Poor road infrastructure from fishing areas to marketing centres
- Product wastage and loss in value due to low literacy, non-adherence to standards and limited local technology / infrastructure.

7. Export of fish from Aquaculture sources

- Capacity to verify and certify compliance not clearly defined
- Lack of collaboration between relevant agencies
- Capacity and competencies for the analysis of residues of veterinary drugs and hormones not available

LESSONS FOR THE FUTURE

- There must be improved collaboration between all the stakeholders. This would harmonize procedures for export and make information and trade related data more authentic and easily available.
- Improved collaboration of community based landing sites with the Fisheries Commission to improve and maintain them and to improve hygiene at these beaches and on the canoes operating there.

LESSONS FOR THE FUTURE – Cont'd

- To improve trade between African Countries, the government could make investments in researching new technologies which will improve the processing techniques and make them affordable to small scale enterprises.
- Due to the government's encouragement to increase aquaculture production, it is important that competence in the verification of compliance and certification of aquaculture products must be developed to enable the country export fish from aquaculture sources.

LESSONS FOR THE FUTURE – Cont'd

- The ECOWAS regional workshop on the harmonization of the management of food hygiene which discussed the implementation of the reference document in managing food hygiene must be discussed at a governmental level to expedite its implementation

ON-GOING INITIATIVES

- 2nd phase of EU/ACP Project targeting the artisanal sector to improve fish and fisheries product health conditions.
- Attempts to change the use of wooden crates for handling/storing fish on board canoes and by market women.
- The initiative by the government to establish national traceability centre (for all products) in collaboration with UNIDO (is expected to resolve the issue of information flow among stakeholders if well managed).

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THANK YOU