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Conclusions and
recommendations



As discussed throughout this report, the fisheries sector has significant potential to make a major contribution to national socio-economic development. The sector is a critical entry point for poverty alleviation in The Gambia: it is a source of food and protein for the population; a source of revenue and foreign exchange earnings; and has significant potential for employment generation, particularly for low-income women. It is in this regard that the Government should continue to give high priority to its development. The consideration of gender issues throughout the planning, implementation and monitoring of sectoral policies will result in a more efficient development of the sector, and will ensure that important food security concerns are met.

The Government should proactively pursue a coherent policy to spur the development of the sector. The recommendations outlined below suggest a framework of actions to move towards this objective, and which will involve: i) comprehensively tackling structural obstacles and capacity constraints that hinder the international competitiveness of the sector (section 4.1); ii) effectively tackling gender-specific obstacles that may impact on the outcome of sectoral policies, as well as addressing sustainability issues (4.2); and iii) exploring niche markets for high-value products, with a view to “dynamizing” the sector (4.3).

4.1 ADDRESS STRUCTURAL OBSTACLES AND IMPROVE CAPACITY

An effective national strategy for boosting the fishing industry will require a coordinated and integrated approach to the various structural problems outlined in the previous analysis. If effectively designed and implemented, this strategy could contribute to expand the fish-processing sector in The Gambia, with significant job creation and poverty alleviation effects, particularly for women. There are several main policy areas in this regard, as outlined in table 12.

The pooling and alignment of external funds is critical to fund this strategy. Particularly in the SPS area, a number of Aid for Trade initiatives can catalyze development assistance in support of the country’s efforts to develop the basic laboratory infrastructure and capacities to ensure compliance with SPS requirements in key export markets. The key challenge is to align aid flows to the priorities expressed in the national fisheries strategies.

4.2 TACKLE GENDER-SPECIFIC CONSTRAINTS AND ADDRESS SUSTAINABILITY ISSUES

a) Redress gender-specific obstacles

As discussed, women play a key role in the sectors, particularly in the domestic chain: an estimated 80 percent of fish processors and 50 percent of small-scale fish traders are women. If the constraints affecting women’s ability to carry out their trade are not addressed, this may negatively affect the overall prospects for sector development. Also, given women’s crucial roles in the domestic marketing chain, any efforts to reduce food insecurity must take into consideration the constraints that women face in their trade. Hence, a call for gender-specific and gender-redistributive policies in the fisheries sector, with a view to creating a more balanced relationship between men and women in access to: supplies, facilities and services. Three important intervention areas are outlined below.



Table 12. Main Policy Areas	
Constraints	Approach/measures
<p>Poor reliability and high cost of electricity</p>	<p>Give priority (special tariffs) to the fisheries sector, as has been done for the agricultural sector.</p> <p>Reduce the cost of fuel (through subsidies) destined for use by the fishing industry.</p> <p>Promote the use of alternative energy sources (solar, wind, etc.); with a view to reducing the sector's dependence on fossil fuels. One particularly promising way to do this would be to replicate the wind-driven turbine technology being designed under the EIF Tier 2, along the coast as well as at inland CFCs.</p> <p>Consider reforming the power sector, by enhancing competition and improving financial and managerial performance.</p>
<p>High tax rates and tax burden</p> <ul style="list-style-type: none"> • Relatively high tax rates – 30 percent of profits if declared, or 2 percent of turnover if profits were not declared (and 3 percent in case of late payment). • The complexity of the tax system- with various taxes levied at the end of the year - makes it difficult for operators to factor taxes into production costs for planning purposes. • The turnover tax - to be paid even if the business was not profitable - is perceived as unfair and distortionary, as it discourages investment in supply expansion. • Policy inconsistency - displayed by the fact that though Gambia's tariff allows for duty exemption on plants and equipment used in the industry, there is evidence that requests for duty waivers supported by both the Fisheries Department and the Ministry of Trade had been rejected by the competent fiscal authorities. 	<p>Streamline the taxation system, and ensure policy coherence between different Government entities on matters of duty exemption.</p>
<p>The cost of credit</p> <ul style="list-style-type: none"> • Investment credit is hardly available, due to very high interest rates (30 percent in commercial bank lending) and collateral requirements. • Lending is mostly short term (less than 1 month), while payments are required for a longer term (for e.g., the export of sole fish requires a period of at least 45 days). 	<p>Ensure effective implementation of the Growth and Competitiveness Project.</p> <p>Promote joint ventures or partnerships between processing factories and foreign partners, who may provide financial inputs and managerial expertise.</p> <p>Artisanal operators:</p> <ul style="list-style-type: none"> - Provide training on record keeping and business planning (assess creditworthiness). - Promote the grouping of individuals into intermediate organizations (CBOs and VISACAs with track records in savings and credit delivery, etc.), to which credit can be more easily extended.
<p>Infrastructure/supply constraints</p> <p><i>Industrial:</i></p> <ul style="list-style-type: none"> • A lack of facilities to service industrial trawlers. <p><i>Artisanal:</i></p> <ul style="list-style-type: none"> • A lack of cold storage facilities and ice supply in many landing sites along the coast and in inland areas. • Poor fish storage facilities at landing sites. • A lack of appropriate transport facilities (insulated containers and handling equipment). • Inadequately equipped fish markets. 	<p>Revitalization of the Banjul Fisheries Jetty (and associated facilities), and of the Dock Yard and the slip way at the Ports Authority facility, to service industrial trawlers fishing in Gambian waters.</p> <p>The upgrading of selected CFC key infrastructure facilities (including the three fish landing sites (Brufut, Tanji, and Gunjur), earmarked for installation of wind turbines, as well as important inland fish landing sites (e.g. Bintang, Albreda, and Tendaba).</p>
<p>Capacity constraints (SPS)</p>	<p>Training to industry official inspectors (Fisheries Department) in the management and application of principles of the Hazard Analysis and Critical Control Point (HACCP) system, and related sanitary control.</p> <p>Investment in national SPS (testing/methodology) infrastructure (accredited laboratory for official testing).</p> <p>Enhancing of sub-regional cooperation on SPS matters (network of regional laboratories or central regional facility), with a view to maximizing complementarities and cost-effectiveness.</p>

b) Address sustainability issues

An important constraint that needs to be addressed is the potential overexploitation of the demersal species, as this will have a direct impact on raw material supply, and consequently on the performance of the fishing companies. From a policy perspective, this calls for management and conservation of fish stocks through the development of long-term policies with a clear vision of priority actions. These include strengthening the governance of the fisheries, and reducing illegal fishing.

As most demersal species are straddling and migratory fish stocks, a sub-regional approach is required. A regional conservation policy and strategy should be devised and implemented within the framework of the Sub-regional Fisheries Commission. Working in close collaboration with research centres in the region (e.g. the Senegalese Centre de Recherche Oceanographic de Dakar, Thiaroye –CRODT, and the Mauritanian Institute of Oceanographic Research and Fisheries –IMROP), the regional strategy will involve a research and stock assessment component that will inform both the regional as well as the individual national policies. The SRFC could even be mandated, in due course, to negotiate access agreements on behalf of the member countries; in the same way that it coordinated a Monitoring, Control and Surveillance program for the sub-region.

It is also critical to raise awareness at the local (fishing communities) level, to promote effective forms of community-based management axed on peer-pressure. Particular areas known (either through scientific research or using local knowledge) to be fish congregation areas, for example, could be co-managed (by government and local community based organizations) to protect and/or rehabilitate.

In view of the apparent over-exploitation of the demersal stocks, more attention should now be focused on the under-exploited pelagics which are still relatively abundant. This will, in addition, reduce the pressure on the demersals and help them recuperate. A systematic reduction of the fishing effort on the demersal stocks is also necessary, and should involve the review of current fishing agreements, including the Senegalo-Gambian fishing agreement.

4.3 EXPLORE NICHE MARKETS FOR HIGH-VALUE PRODUCTS

a) The development of aquaculture

The potential for commercial and artisanal aquaculture involving shrimps and oysters is high. There is significant potential for a product differentiation strategy for shrimps (antibiotics-free shrimp with unique characteristics in terms of texture and seize), with a focus on high-value niche markets (e.g. gourmet restaurants in Europe). Artisanal oyster farming, involving the women oyster harvesters, can expand the local oyster trade and even encourage the development of the half-shell trade to supply the Gambian tourist market. The natural oyster population will also be preserved, as harvesting pressure will be reduced.

A major constraint that needs to be addressed, however, is the high cost of fuel to run the generators for both pond production and post-harvest processing. The Government may consider specific inputs subsidies targeted at resource-poor operators to ease this constraint.

The strict implementation of stringent sanitary and phytosanitary measures is also critical, particularly if the focus is on high-value niche markets. Equally important is the siting of operations, which must be chosen with due care to take potential environmental pollution into account. These issues and obstacles should be identified and addressed within the framework of public-private partnerships that include strategic buyers (traders, specialized wholesalers, and outlets in consumer markets).

b) The Diaspora trade

There is a potentially important niche export market for smoked catfish and other high value fish species - including shrimps, barracuda, etc. - to the Gambian Diaspora in Europe and America. This trade is currently undertaken by individual women on a small scale. Yet, as discussed, it could be the basis for a niche market that can be developed. The government should investigate this market potential with a view to enhancing its development, and possibly diversify the product base to include the still under-exploited pelagic species.