

The fisheries sector in the Gambia: trade, value addition and social inclusiveness, with a focus on women



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ACRONYMS AND ABBREVIATIONS

ANR	Agriculture and Natural Resources
ANRWG	Agriculture and Natural Resources Working Group
CA	Competent Authority
CBG	Central Bank of The Gambia
CBO	Community Based Organization
CCLME	Canary Current Large Marine Ecosystem
CCRF	Code of Conduct for Responsible Fisheries
CECAF	FAO Fishery Committee for the Eastern Central Atlantic
CFC	Community Fisheries Centre
COFI	FAO Committee on Fisheries
CRODT	Centre de Recherche Oceanographique de Dakar, Thiaroye
CRR	Central River Region
DOF	Department of Fisheries
ECOWAS	Economic Community of West African States
EEZ	Exclusive Economic Zone
EIF	Enhanced Integrated Framework
ESMP	Environment and Social Management Plan
EU	European Union
FAO	Food and Agriculture Organization
FAO SPWG NWA	FAO Working Group on the Assessment of Small Pelagic fish off Northwest Africa
FAO/CECAF DWG	FAO/CECAF Working Group on the Assessment of Demersal Resources
FEU	Fishing Economic Unit
GAFDP	Gambia Artisanal Fisheries Development Project
GAFSP	Global Agriculture and Food Security Program
GAMSEM	Gambians in Self-employment
GAWFA	Gambia Women's Finance Association
GBOS	Gambia Bureau of Statistics
GDP	Gross Domestic Product
GMD	Gambian Dalasi
GEF	Global Environment Facility
GOTG	Government of The Gambia
GIEPA	Gambia Investment and Export Promotion Agency
GPA	Gambia Ports Authority
GRT	Gross Registered Tonnage
HACCP	Hazard Analysis and Critical Control Point
IMR	Institute of Marine Research
IMROP	Mauritanian Institute of Oceanographic Research and Fisheries
JICA	Japanese International Cooperation Agency
KWh	Kilowatt Hour
MCS	Monitoring Control and Surveillance
MFI	Microfinance Institution
MOA	Ministry of Agriculture
NACCUG	National Association of Cooperative Credit Union of Gambia
NAWEC	National Water and Electricity Company
NES	National Export Strategy
NORAD	Norwegian Agency for Development Cooperation
OMVG	Organization for the Management of The Gambia River Basin
PL	Post Larvae
PRCM	Regional Coastal and Marine Conservation Program
SDF	The Gambia Social Development Fund
SME	Small Medium Enterprise
SPS	Sanitary and Phytosanitary
SRFC	Sub-Regional Fisheries Commission
TAGFC	The Association of Gambian Fishing Companies
TCP	Technical Cooperation Program – FAO
TOWA	TRY Oyster Women's Association
UPDEA	Union of African Electricity Producers, Distributors and Conveyors
VAT	Value-Added Tax
VISACA	Village Savings and Credit Association
WAQP	West Africa Quality Program
WTO	World Trade Organization

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This analytical report - part of UNCTAD's activities on trade, gender and development - is intended to accompany the *Diagnostic Trade Integration Study (DTIS) Update for The Gambia: Harnessing Trade for Growth and Employment*, carried out under the Enhanced Integrated Framework (EIF) for trade-related assistance for Least Developed Countries. It sets out a detailed analysis of the fisheries sector and its prospects for value-addition and social inclusiveness, with a focus on women. The intention is to capture all the information generated through the DTIS Update process, and disseminate this knowledge to a broader audience.

The preparation of this report involved the pooling of expertise and resources from: UNCTAD's Division for Africa, Least Developed Countries and Special Programmes (ALDC); and UNCTAD's Trade, gender and Development Section, within the Division on International Trade in Goods and Services, and Commodities (DITC). The study was prepared by an UNCTAD team led by Simonetta Zarrilli, Chief of the Trade, Gender and Development Section at UNCTAD and Stefano Inama, Chief of UNCTAD's Technical Cooperation and Enhanced Integrated Framework Section, and including Momodou Cham and Irene Musselli.

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EXECUTIVE SUMMARY

The relationship between trade and gender is highly contextual and country-specific, as the gender effects of trade depend on the specificities of individual economic sectors and countries. However, it is at times possible to extrapolate some general patterns that are likely to be found across countries. In general terms, The Gambian case study points to three critical dimensions that should be taken into account when promoting fish-export-oriented policies as a pro-poor strategy: i) the existence of gender-specific patterns in the processing and marketing of fresh and cured fish products; ii) the resultant, gender-differentiated impacts of a commercial, export-oriented strategy in the fisheries sector; and iii) the need for trade policy responses that are gender-specific and redistributive.

The fisheries sector is a critical entry point for poverty alleviation in The Gambia. It provides a source of revenue and foreign exchange earnings for the country; but also contributes importantly to food and livelihood security, particularly for the poor. The sector is the third largest food provider - after agriculture and livestock - and plays a significant role from a nutritional standpoint, being the main supplier of animal protein in the diets of most Gambians. Fisheries and related activities (processing and marketing) also provide income to the poor: fish-related activities represent the main source of income for coastal fishing communities, and are an important complement activity (and safety net) for rural communities inland. In The Gambia, the artisanal subsector employs between 25,000 and 30,000 people, while about 2,000 people work in the industrial sub-sector. The livelihoods of an estimated 200,000 people are indirectly dependent on fisheries and related activities. For women in particular, fish processing and marketing provide an important source of income and livelihood support: an estimated 80 percent of fish processors and 50 percent of small-scale fish traders are women.

In the sector, men and women tend to produce rather distinctive products, operate on different scales, and serve different markets. This results in rather specific gender-based trade patterns throughout the chain. Women are the predominant dealers involved in the domestic marketing of fresh and cured fish products; while export of the frozen and smoked-dry products is mainly carried out by men. The operations of the women fish processors essentially involve small-scale

direct marketing on a daily basis, and low profit margins. Women typically buy a few trays of fresh fish from large-scale mongers at land sites, and transport it to various urban markets where the fish is retailed. The operations of male fish processors and traders tend to be more capital-intensive and on a larger scale: their products are marketed to the inland and sub-regional markets, where the profit margins are higher. Some large-scale specialist fish dealers (usually men) export the fish to Senegal - or to Ghana, Guinea Conakry, Nigeria, etc. - in smoked or dried forms. Processing factories also procure their fresh fish supply for export to the EU from large-scale (men) fish suppliers.

This division of labour reflects deeply embedded social roles: in The Gambian context, women look after the children, work on the family plot, tender small livestock, etc. and are less likely than men to be away from home. However, it is also a consequence of gender disparities in access to productive assets. Observations at selected landing sites, for example, have evidenced women's unequal access to community-managed facilities: women tend to occupy units in need of rehabilitation, for which they pay a rent with virtually no service provided. As in other contexts, the overall tendency seems to be that women tend to receive "diminished" assets, while sectors that attract investment tend to "defeminise".

The acknowledgement of these gender dimensions is critical when designing policies geared towards upgrading the fisheries sector in The Gambia. The rationale for gender-sensitive measures in this context is twofold.

First, 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, as women represent the majority of fish processors and about half of fish traders. Improving the overall efficiency of operations will largely depend on ensuring that women processors and traders - as well as men - have sufficient access to quality supplies, upgraded facilities, and credit and support services.

Second, 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. It is important to note, in this respect, that an expansion of the export-oriented

fish-processing industry is likely to generate significant employment opportunities for relatively unskilled women downstream (factory processing), with positive effects in terms of poverty alleviation. However, it may also unleash dynamics of social polarization and exclusion upstream in the chain, with potentially important food security implications. This is because the expansion of an export-oriented fish industry may, to some extent, accentuate the dual-nature structure of the fisheries chain. In particular, it may incite some diversion of resources from the domestic segment (domestic marketing and distribution of fresh fish and traditionally processed products) to the export-oriented segment (particularly fresh and frozen fish products serving the EU market). This could act to the detriment of small-scale women operators, who mainly operate in the domestic segment. More generally, the selective upgrading and segregation of the export-oriented segment of the chain may accentuate social cleavages between the relatively empowered and the relatively disempowered; and between large-scale dealers (involved in the export segment) and small-scale traders (predominant in local marketing). Also, for those fish species that serve both the export and domestic markets, there may be some diversion of supplies from the domestic to the export chain, with important food security implications. To effectively tackle food security issues it is thus important to identify and understand the dimensions and relevance of gender issues and gender-based constraints, and take corrective actions.

Hence, a call for trade policy responses that are not only gender-specific (in that they respond to practical gender needs of either sex), but also gender-redistributive (as they tend to create a more balanced relationship between men and women in access to productive resources). Three important intervention areas are outlined below.

A critical issue is the integration of gender considerations into the design and implementation of fisheries infrastructure projects. It is important, in particular, to acknowledge and address gender-based constraints throughout the planning, implementation and monitoring of projects aimed at the rehabilitation and expansion of facilities at fisheries landing sites and fish domestic markets. The objective is to ensure that facilities used by women are upgraded, or that upgraded facilities (including those that serve the export-oriented segment of the chain) can be effectively accessed by women, as well as men. Concrete measures may

include quotas, informal complaints procedure, etc. Community mobilization in the identification and enforcement of suitable gender-redistributive measures is critical in this context, as the whole process should be endogenous, from within the community. Community leaders, in particular, should be mobilized to support women's access to resources. Prioritized investment should also continue to include facilities that cater to small-scale operators (women) who serve the domestic market, and not only facilities designated for export. Strategic domestic-oriented facilities would include: ice plant and cold storage facilities to market high quality fish products at main urban/inland markets; fish handling and processing equipment and improved processing techniques in the domestic chain; packaging material at landing sites; and dedicated, well-equipped fish markets.

Parallel action should be taken to favour women's access to resources (credit) and support services (training and extension, and marketing). As regards access to credit, affirmative actions taken to redress power imbalances may include a target percentage of credit to be disbursed to women and dedicated lines of credit for women operators. Training is needed in at least three key areas: i) technical training in the handling, processing, and marketing of fish and fish products (fresh and cured) with a view to improving food security and quality; ii) marketing (how to use market information and establish business contracts and alliances); and iii) record-keeping and business plan formulation (this will help micro-finance institutions to assess credit-worthiness).

It is also important to explore niche markets for high-value products that can generate income for women. The potential for commercial and artisanal aquaculture involving shrimps and oysters is high. Shrimps offer significant potential for a product differentiation strategy (antibiotic-free shrimp with unique characteristics in terms of texture and size), with a focus on high-value niche markets (e.g. gourmet restaurants in Europe). Artisanal oyster farming, involving 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. A different niche of interest for potential development and expansion is that of traditional ethnic foods of value for The Gambian Diaspora. Specifically, 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. The realization of women's commercial potential in these areas depends on enhancing their access to credit and support services (training, extension and marketing). 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 taking into due account potential environmental pollution. Finally, in order to effectively identify and tackle market access and market entry barriers, it is key to set up strategic alliances involving women operators, key public entities, and off-takers (for example: traders, specialized wholesalers and retailers in targeted export markets).
