



1

Introduction and report outline



With a total area of 11,420 sq km, the Republic of The Gambia is one of the smallest countries in Africa. It is located in West Africa, bordered on the West by the Atlantic Ocean and on the other three sides by Senegal. Its geography is distinctive: like a tongue in the mouth of Senegal, the country extends inland for about 480 kilometres along the banks of the river Gambia; its Atlantic coastline is only 80 km in length. A semi-enclave in Senegal, The Gambia shares common socio-cultural features with its surrounding neighbour, including: similar ethnic groups (the Mandinka, Wolof, and Serere, among others), shared languages (Senegambian languages), and a similar religious makeup (Muslims represent over 94% of the population in The Gambia). The country is divided into 5 regions (the West Coast Region, Lower River Region, Central River Region, Upper River Region and North Bank Region), and two municipalities (the City of Banjul and Kanifing Municipality – part of the Greater Banjul Area). The capital city is Banjul.

The Gambia is one of the 49 countries that are officially recognized by the United Nations as Least Developed Countries (LDCs), based on economic vulnerability and human asset indicators. In spite of its LDC status, the country shows some economic dynamism. The country's 3.8 percent average annual GDP growth rate for 2000-2011 was higher than the average among West African Economic and Monetary Union countries (UNCTAD, DTIS Update 2013). In terms of output structure, the tertiary sector currently contributes to over half of the country's GDP and is rapidly developing, largely driven by tourism. The tourism sector alone - a sector in which The Gambia is improving its competitive position - supports over 10,000 direct and indirect jobs out of a total formal, private sector employment of 22,000 (World Bank, DTIS 2007). The Gambia Bureau of Statistics (henceforth GBOS) estimates the overall contribution of the Agriculture and Natural Resources sector to be (crops, livestock, forestry and fishery) at 30 percent of GDP (2010); with the crops sector alone contributing about 20 percent. The Agriculture and Natural Resources is reported to account for more than 70 percent of employment. Industry (including the extractive industry, energy and manufacturing) was estimated to account for about 12 percent of GDP (2010).

The Gambia continues to run a merchandise trade deficit, but has had a current account surplus since 2008, driven by net transfer payments. Remittances constitute an important source of foreign capital. They

account for 7.4 percent of The Gambia's GDP and for 26.2 percent of The Gambia's trade in goods and services (UNCTAD, DTIS Update 2013). The Gambia also relies heavily on official development assistance (ODA) inflows. In 2010 The Gambia received US\$ 110 million in ODA, amounting to some 11 percent of its GDP (UNCTAD, DTIS Update 2013). The Gambia has high export and import ratios to GDP, but as much as 90 percent of exports were estimated to be re-exports to the sub-region (World Bank, DTIS 2007). Tourism is the single most important export sector and a major foreign exchange earner; groundnuts are the dominant merchandise export.

The Gambia has a population of about 1.36 million (Census 2003). In the Integrated Household Survey (IHS) 2010 sample, the proportion of urban and rural populations were 50.9 and 49.1 percent respectively, very close to the 2003 Census. More than 50 percent of the sampled population was under 20 years old. The proportion of females (51.9 percent) was higher than that of the males (48.1 percent). A wide variety of ethnic groups live in The Gambia. The main groups include: the Mandinka (about 36.8 percent of the population), the Fula (19.5 percent), Wolof (15 percent), Jola (10.7 percent) and Serahule (9.2 percent) (African Development Bank, 2011). Ethnicity is an important factor in the division of labour. The Mandinka are mainly engaged in agriculture, while the Fula are traditionally herdsmen, though occupational divisions have blurred over time. Ethnicity intersects with gender in framing specific patterns of occupational segregation. For example, Jola women from Senegal are often employed in domestic service as maids, while Mandinka women more typically grow vegetables. Furthermore, ethnicity overlaps with class and social divisions, as not all ethnic groups are equally affected by poverty. According to the Integrated Household Survey 2003-2004, for example, the poorest groups were the Mandinka (67.3 percent were poor) and the Fula (66.3 percent).

The results of the 2010 IHS show that 48.4 percent of the population live below the poverty line of US\$ 1.25 per day (compared to 58 percent of the population in the 2003- 2004 IHS). Although poverty has declined, the gap between the richest and the poorest is widening: the 2010 IHS shows that the lowest quintile (poorest 20 percent of the population) are consuming only 5.6 percent (share of total household consumption), compared to 8.8 percent in 2003; whereas the 5th quintile (richest- top 20 percent) are consuming 46.5 percent, compared to 38.0 percent in 2003.

The likely determinants of poverty in The Gambia include (2010 IHS):

- Place of residence, as rural residence is strongly correlated with poverty: using the US\$ 1.25 poverty line, poverty was significantly higher in the rural than in the urban areas (73.9 percent as compared with 32.7 percent, respectively).
- Average household size: Poverty increases as the household size increases.
- Educational attainment of the household head: The higher the educational attainment, the lower the likelihood of poverty. In the 2010 IHS, the poverty rates range from 58.4 percent for those with no education, to 17.8 percent for those with tertiary education.
- Gender of household head: The analysis is not straightforward. According to the 2010 HIS, the incidence and severity of poverty is lower for female-headed households (19.4 percent of all households) than for their male counterparts: 38.3 percent of female-headed households live on less than US\$ 1.25 per day, compared to 50.9 percent of men-headed households (28.2 percent vs. 38.8 percent using the poverty line of US\$ 1 a day). This is contrary to the findings of the 2003 IHS, according to which female-headed households had higher poverty rates (60.3 percent) compared to their male-headed counterparts (40.7 percent)). According to the 2010 IHS, the reasons for this disparity in overall poverty levels is attributable to a list of factors: female-headed households now tend to be smaller (with fewer members); they receive more remittances than their male-headed counterparts; and also, the proportion of women in the (relatively precari-

ous) agricultural sector has decreased significantly compared to 2003. An analysis of income data by gender shows that - overall - the average per capita household income for male-headed households (D 16,015) is higher than for female-headed households (D 15,582).

- Sector of employment of the household head: Household heads employed in the agricultural and fishing sector exhibit higher poverty rates using both thresholds (PUS\$ 1.25 = 79.0 percent, PUS\$ 1 = 68.8 percent), compared to household heads employed in the other sectors.

These findings point to specific sectors where policy intervention has the greatest potential to alleviate poverty. In particular, the strong correlation of poverty with rural residence and employment in agriculture and fishing points to the need to prioritize these sectors for purposes of poverty alleviation.

Against this background, this report looks at the fisheries and fish-processing sector in The Gambia. The objective is to identify socially inclusive and gender-responsive development strategies for the sector. The overall structure of the report is as follows.

Chapter 2 first briefly assesses the role of fisheries and fish-related activities in the economy in terms of contribution to: output, employment, revenue generation, and foreign exchange earnings (macro-level analysis). The analysis then sheds light on the organization of the fish product chain by mapping out different value chain actors, their roles, and the relationships between them (meso- and micro-oriented approach). This brief background analysis will generate important analytical and policy insights for the design of a sectoral policy that is socially-inclusive and gender-sensitive.

Table 1. Poverty by sector of employment of the household head

Sector of employment	Headcount rate (< US\$ 1/person/day)	Distribution of the poor (< US\$ 1/person/day)	Headcount rate (< US\$ 1.25/person/day)	Distribution of the poor (< US\$ 1.25/person/day)
Agriculture and fishing	68.8	43.6	79.0	39.6
Mining	46.2	0.3	61.6	0.3
Manufacturing and energy	33.6	5.6	43.6	5.5
Electricity, gas and water	5.8	0.3	21.2	0.5
Construction	35.6	5.2	50.2	5.6
Trade, hotels and restaurants	24.2	14.3	36.2	16.3
Transport and communication	37.7	5.1	51.2	5.1
Financial management	20.7	0.4	32.8	0.6
Social and personal service	28.1	12.2	40.4	12.9

Source: Integrated Household Survey - Income and Expenditure Poverty Assessment, 2010

Chapter 3 assesses critical constraints that hamper the competitiveness of the industrial, aquaculture and artisanal sub-sectors; identifies areas of competitive advantage/commercial potential (particularly niches or products that can generate value-added through women's work); and seeks viable solutions to overcome development obstacles, in a gender-sensitive way.

Chapter 4 concludes by listing some priority areas for policy intervention in the Gambian fisheries and fish-processing sector.

Gender issues flow throughout the analysis, and inform the policy recommendations. The report reflects consultations with key government, private sector and civil society representatives; as well as semi-structured interviews with various stakeholders in the artisanal subsector.
