

## **Adding value to Artisanal Fishing – valorising a highly perishable but highly prized commodity.**

Far from the miserable images often portrayed, artisanal fishing can represent a dynamic sector, capable of innovation and, if given appropriate attention and support, could represent the best option for the future as much in the North as in the South. This was the subject of the article published in Samudra 44 on the revival of the line fishery for tuna in the Bay of Biscay.

Two privileged observers of the evolution of the artisanal fishing sector, Ahmed Mahmoud Chérif<sup>1</sup> from Mauritania and Marc Allain<sup>2</sup> from Canada, react to the issues raised in that article, and, based on their respective experiences, discuss the opportunities offered by artisanal fisheries given the challenges of the new millennium.

### **Marc Allain**

The link between the importance of product quality and the value of the landings of the artisanal fleet, such as those highlighted in the Samudra article on line fishing for tuna in the Bay of Biscay, reminds me of our reflections in Canada we carried out two exhaustive studies on the socio-economic evolution of Canadian fisheries over the previous 15 years. These studies showed that the value of fish landings had increased considerably following the collapse of demersal fish stocks in 1992 because the industry focused on fresh (such as fillets and crab), and live products (like lobster). We had moved from a situation of high volume/low value, associated with industrial production, to a situation of low volume/high value associated with artisanal fishing.

### **A.M. Cherif**

It is the same in Mauritanian fisheries, where the superior quality and good potential for value addition is an intrinsic characteristic of artisanal fishing. Thus in 2005, artisanal octopus sold for 200 dollars/tonne more than the product caught by the freezer trawlers which is frozen at sea. As regards the valuable demersal species, only the artisanally caught products meet the quality conditions required for export to the European markets, attracting average prices of 4.5 Euros/kg, whilst the same fish in frozen form caught by the industrial fleet gets less than 2 Euros/kg. The volume of fresh fish exports from artisanal landings reaches 6000 tonnes per year.

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<sup>1</sup> *Former Fisheries Director in Mauritania (1976 – 1980) and General Secretary of the Ministry of Fisheries and Maritime Affairs (1986 – 1988), today he is the President of the NGO Pêchecops (Social Development through Ecologic Fishing).*

<sup>2</sup> *Former Senior Policy Adviser to the Canadian Council of Professional Fish Harvesters, he now works as a consultant for NGOs and Environmental Organisations on issues of sustainable fisheries development.*

In a general way, several sectoral studies have shown that the value added locally by artisanal fisheries provides on average 85% of their turn over, whilst in the Mauritanian industrial sector the rate is about 50%, and much lower in foreign industrial fishing operations.

### **Marc Allain**

It must be emphasized that it is often misleading to talk about the “value added” of fish processing because in most cases processing adds no real value to the product. As soon as it comes out of the water, fish begins to lose value. If we really want to optimise the value of the landings, then we must keep the fish alive or chilled for as long as possible so as to “preserve its value”.

Focussing on live or chilled products favours an artisanal fishery for several reasons. Firstly the fishing trips in artisanal fishing are short in time and close to the landing centres, and this allows products to be kept chilled or even alive with minimal investment (in ice and insulated boxes). Secondly the gears use in artisanal fisheries (long lines, traps etc) allow fish to be caught alive and in a very good condition. Finally lower catch rates allow for improved handling on-board and this preserves the value of the product. But the trend towards fresh or live products may also have serious adverse knock-on effects for employment. Losses of shore jobs, particularly amongst women, have not been fully compensated for by the increasing crew sizes needed for better on board handling.

### **A.M. Cherif**

Its like Marc says, the amount of value added is not necessarily linked to the degree to which the product is processed. In Mauritania, we have two examples that illustrate this.

The link between value added and processing is very clear in the fishery for grey mullet. One tonne of mullet landed by the artisanal fleet and processed for the extraction of *poutargue* (the dried and salted eggs) can yield, on average close to 4500 USD, providing 91% of the value added on turn over. One tonne of the same mullet from the industrial fishery, in frozen form and not suitable for the production of *poutargue*, when exported for the African market attracts a price well below 300 dollars!

To provide an idea about scale, the volume of fish landed by the artisanal sector – around 14,000 tonnes – provides a total turn over after processing of near on 62 million US dollars. Meanwhile, the industrial catches of mullet, of around the same volume, only bring in 4 million US dollars! This example illustrates how much is wasted by the industrial fishery for mullet.

By contrast, for other products like grouper (merou) and bream (dorade), processing provides no added value. Thus the export of fresh grouper and dorade fillets provide much lower returns than the export of the whole fresh fish. It is also well known that fishermen get a much better return by selling their sardines frozen whole, than by processing them into meal and oil.

## **Marc Allain**

The other big issue for the future of fishing is the fact that wild fish will become an increasingly rare commodity. Fresh wild fish, of excellent quality will become a luxury high cost product that will distinguish it from cultured fish. It is questionable whether artisanal fishing communities will be able to benefit from this trend or if they will be marginalized by all the processes associated with the privatisation of resource access. This also will have consequences for the poorest sectors, which currently depend on wild caught fish for their own consumption.

For example, in Canada, the processors have more or less abandoned the industrial approach and are tireless in the efforts to obtain firm resource property rights.

And all of that will be played out within the EEZs as that's where most of the fish is. Hence the importance of fisheries policies and the provisions made for the artisanal fishing fleet, which can use economic arguments to support their demands for special protection.

## **A.M. Cherif**

In Mauritania the limited catching capacity of the artisanal fleet is often used to support this line of argument. But as Marc points out, the more valuable species are highly coastal, and their main concentrations are easily accessible to artisanal fishing.

## **Marc Allain**

Its clear that a fresh/live strategy may not be applicable in every case, as Ahmed Mahmoud points out, for example where there are large volumes of migratory pelagics or when the fishery targets fish at the end of their life cycle, as in the case of salmon in our part of the world, where processing is vital for product conservation.

What is deplorable, and which is often the case, is that government economic planning strategies are not aware of the potential of artisanal fishing as a way to maximize the value of fishery resources, which they tend to scorn, believing that everything must be put in a can to get the highest return.

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