Artisanal fishing

Don't can everything

This exchange between two observers of the artisanal fishing sector in two continents stresses the need to add value to the sector's products

Far from the miserable images often portrayed of artisanal fisheries and traditional fishing communities, the sector can be a dynamic one, capable of innovation and, if given appropriate attention and support, perhaps the best option for the future of sustainable fisheries both in the North and in the South. This potential was highlighted in the article on the revival of the line fishery for tuna in the Bay of Biscay, titled *Other Ways of Fishing*, published in *SAMUDRA Report* No. 44, July 2006.

Here, in this dialogue, two privileged observers of the evolution of the artisanal fishing sector, Ahmed Mahmoud Chérif from Mauritania and Marc Allain from Canada, react to the issues raised in that article and discuss the opportunities offered by artisanal fisheries.

Chérif was Fisheries Director in Mauritania between 1976 and 1980 and General Secretary of the Ministry of Fisheries and Maritime Affairs during 1986 to 1988. Today, he is the President of the non-governmental organization (NGO) Pêchecops (Social Development through Ecological Fishing).

Marc Allain, former Senior Policy Adviser to the Canadian Council of Professional Fish Harvesters (CCPFH), is now a consultant to NGOs and environmental groups on sustainable fisheries development.

Allain: The important link between good product quality and the value of the landings of the artisanal fleet, as highlighted in the *SAMUDRA Report* article on line fishing for tuna in the Bay of Biscay, reminds me of our reflections in Canada after we carried out two exhaustive studies on the socioeconomic 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 fish (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.

Cherif: It is the same in Mauritanian fisheries, where superior quality and good potential for value addition is an intrinsic characteristic of artisanal fishing. Thus, in 2005, octopus caught by the artisanal sector sold for US$200 per tonne more than the product caught by freezer trawlers and frozen at sea. As for high-value 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 per kg. The same fish in frozen form caught by the industrial fleet gets less than 2 Euros per kg. The volume of fresh-fish exports from artisanal landings is as much as 6,000 tonnes per year.

In a general way, as shown by several sectoral studies, the value added locally by artisanal fisheries accounts, on average, for 85 per cent of their total turnover, while in the Mauritanian industrial sector, the rate is about 50 per cent, and much lower in foreign industrial fishing operations.

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 optimize 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.

Focusing on live or chilled products favours an artisanal fishery for several reasons. Firstly, the fishing trips in artisanal fisheries are short in duration, and close to the landing centres, which allows products to be kept chilled or even alive with minimal investment (using ice and insulated boxes). Secondly, the gear used in artisanal fisheries (longlines, 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.

Cherif: It's as you say: 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* (dried and salted mullet eggs) can yield, on average, close to US$4,500, providing 91 per cent of the value added on turnover. One tonne of the same mullet from the industrial fishery, in frozen form and not suitable for the production of *poutargue*, when exported, attracts a price well below US$300.

To provide an idea about scale, the volume of fish landed by the artisanal sector—around 14,000 tonnes—provides a total turnover, after processing, of nearly US$62 mn. Meanwhile, the industrial catch of mullet, of around the same volume, brings in only US$4 mn. 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 bream fillets provides much lower returns than the export of the whole fish fresh. 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.

Allain: The other big issue for the future 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 privatization of resource access. This also will have consequences for the poorest sectors, which currently depend on wild-caught fish for their own consumption.

In the case of 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 this will be played out within the exclusive economic zones (EEZs), which is where most of the fish are. Hence the importance of fisheries policies and the provisions made for the artisanal fishing sector, which can use economic arguments to support their demands for special protection.

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 mainly coastal, and their main concentrations are easily accessible to artisanal fishing.

Allain: It's 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.

This dialogue has been constructed by Béatrice Gorez (cffa.cape@scarlet.be), Co-ordinator, Coalition for Fair Fisheries Arrangements (CFFA), based on email exchanges