

# 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.

The report draws extensively on information and material gathered in The Gambia. The following officials and experts provided guidance, contributed ideas and gave their time for interviews: Momodou Njie, Principal Fisheries Officer and Head of Inspection Approval and Certification Systems, Inspectorate Unit, Fisheries Department; Ousman Mass Jobe, Principal Fisheries Officer, Extension Unit, Fisheries Department; Anna Mbenga Cham, Principal Fisheries Officer, Research and Development Unit (Bio-Statistics), Fisheries Department; Peter Ndow, Artisanal Fisheries Development Project Coordinator, Fisheries Department; Famara Darboe, Assistant Director, Fisheries Department; Alagie Sillah, Executive Secretary, and Edrissa Sanyang, Chairman, The Association of Gambian Fishing Companies; Fern Aguda-Brown, Oyster Women's Association; Lamin Fofana, Financial Controller, The Gambia Social Development Fund; Patrick Mendy, Finance and Admin Manager, and Nuha Sanneh, Manager/Projects Coordinator, National Association of Co-operative Credit Unions; Ebrima Ganno, Operations Manager, Gambia Women's Finance Association; Aminata Deen, Senior Statistician, Gambia Bureau of Statistics; Alieu Saho, Head of National Accounts, Gambia Bureau of Statistics; Ndene Jallow, Manager, The Atlantic Seafood Company; Lennart Hansson, Manager, West African Aquaculture; Awa Demba, Rosamond Trade, Gambia; Ida Jobe Lette and Lala Jaiteh, smoked fish product exporters; Yunus Camara and Sheriff Badjie, Kendaka Fishing; and Fausto Perini, Programme Manager, Economist, Delegation of the European Union to The Gambia. Their inputs are gratefully acknowledged. Field work in The Gambia was facilitated by Bai Ibrahim Jobe and Modou Touray, EIF, Ministry of Trade, Industry, Regional Integration and Employment. Their inputs and logistic support are gratefully acknowledged.

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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

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

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