

# Rapid Assessment of the Marine Fisheries Sector in Ghana

(Photo: Obiri Awuah Kwaku )

## Impact Area 1

Decrease in access to and affordability of fishing and processing inputs

## Impact Area 2

Decline in availability of fish and increase in food prices, threatening food security as well as incomes in the fishing sector

## Impact Area 3

Greater risk of loan defaults and reduced access to finance for the fishing sector

## Impact Area 4

Rise in illegal practices and decrease in law enforcement

## Impact Area 1

### Decrease in access to and affordability of fishing and processing inputs

#### What is the impact?

- COVID-19 has led to a decrease in access to and affordability of inputs for fishing, as well as for fish processing, which were already in dire straits before the pandemic.
- Fishers, who use motorized canoes for artisanal fishing, depend on subsidized premixed fuel, and ice to chill the fish. Stakeholders indicated an increase in the costs of premixed fuel (survey: 50%)<sup>1</sup> and fishing gear, such as nets, motor parts, ropes, and twines (survey: 71%), resulting from the crisis.
- Processing activities have also been hindered by COVID-19 (survey: 69%). Fish processors and traders indicated that access to and/or affordability of inputs for processing (i.e., firewood, ice, wire mesh) have been negatively affected (survey: 63%). At the beginning of the crisis, firewood became scarce due to travel restrictions, and firewood sellers quickly raised their prices.
- Restrictions on the movement of workers as well as fish products, resulting from COVID-19 measures, have led to an increase in the cost of transporting fish (survey: 60%).
- Smoked fish has to be sold in nearby local markets, instead of being transported to destinations further afield for better prices, leading to a glut of supply and a fall in prices.
- Conversely, an opportunity has arisen out of COVID-19 where processed fish is increasingly being packaged and transported to other major markets without an accompanying fish trader; payments are completed on receipt of goods via electronic means such as mobile money transfers.

#### Short term actions

- Government, through institutions such as the Agricultural Development Bank, to ensure the provision of standardized and quality inputs to support the fishing sector.

<sup>1</sup>Survey percentages refer to the percentage of respondents who indicated the statement concerned.



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## Strategic interventions

- Government, development partners, and non-governmental organizations to develop alternative and efficient means of fish processing, involving methods that require less firewood and introducing ovens that use fewer inputs and produce less smoke, i.e., FAO-Thiaroye, Ahotor and gas ovens.
  - Businesses to improve the quality of locally manufactured fishing inputs (in terms of their durability and size) to reduce dependency on imports, which were easily affected by COVID-19.
  - Government to complete the establishment of the Anomabo Fisheries College to facilitate training in the manufacture of fishing gear at local level.
  - Government and non-governmental organizations to encourage the planting of more trees in fish-smoking communities, especially neem (*Azadirachta indica*) and acacia (*Acacia* spp.), to improve the availability of firewood; products smoked with neem have a longer shelf-life and taste better.
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Smoking fish at Cape Coast (Photo: Benjamin Campion)

## Impact Area 2

### Decline in availability of fish and increase in food prices, threatening food security as well as incomes in the fishing sector

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#### What is the impact?

- COVID-19 has led to increases in fish prices (survey: 68%). Fish is of crucial importance to poor people in particular: it contains critical micronutrients and proteins, is available in small portions, and is normally more affordable than other sources of protein or nutrients.
- Stakeholders indicated that the availability of (locally caught) fish has been negatively affected by the crisis (survey: 74%). This could be related to the fact that fishing activities (survey: 73%), crew availability (survey: 51%), and processing activities (see impact area 1) have been hampered over the last year.
- Fishing effort was particularly affected during the lockdown period when fishers were afraid to go fishing. Only a reduced number of industrial vessels were able to go fishing due to fears of contracting the virus from fishers who had visited their families.
- In addition, quarantine measures (all fishers are accommodated in dedicated hotels or rented houses) imposed on fishers from industrial vessels, resulted in higher costs for the industry.
- Due to the travel restrictions, fishers have not been able to move easily to fishing locations along the coast; they are required to show newly introduced identification passes to security officers before being allowed to travel.
- Declining catches have been a trend for some time now. However, COVID-19 has exacerbated the situation, threatening food security.
- Fish is a key element in the diets of Ghanaians, with a high amount of seafood consumed yearly (about 25 kg per capita), compared to the global (18.9 kg per capita) and African (10.5 kg per capita) averages; alone, Ghana can only meet 50% of its demand for fish (440,000 metric tons). To supplement local fish production (marine, inland and aquaculture), Ghana imports mackerel (frozen) and canned fish; however, the production of canned and frozen fish has been hampered by the COVID-19 crisis, making the purchase of fish from importers more difficult (survey: 54%).
- Stakeholders indicated that food prices have risen (survey: 81%), while profitability in the fish sector has decreased (survey: 70%), and there has been a drop in remittances received from outside the fisheries sector (survey: 69%); the resulting situation is of concern for food security and income levels.
- It is worth noting that the high cost of a COVID-19 test is a barrier for people who already suffer from reduced incomes.

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#### Short term actions

- Government to invest in the training of gear technologists to improve gear, enforce existing gear regulations (mesh sizes) through regular inspection, and prevent the catching of juvenile fish.
- District Assemblies to improve on the collection and management of waste to reduce pollution of estuaries and lagoons, which serve as spawning grounds for fish.
- Government to limit the number of canoes in operation, thereby reducing fishing pressure, and increasing the availability of specialized fishers (fish detectors, navigators, net setters) for each canoe, to ensure increased fish catch, efficiency, and profitability of fishing.
- Government to introduce catch quotas for fishers to reduce overfishing.
- The Ghana National Canoe Fishermen Council (GNFC) and the National Fish Processors and Traders Association (NAFPTA) to develop fishers' and fish traders' identification cards for members to facilitate movement.
- Stakeholders to encourage the use of cold stores to help keep fish prices stable when there is a bumper catch.



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## Strategic interventions

- Chief fishermen - the eyes and ears at landing beaches - to be sufficiently empowered to play a role in fisheries law enforcement.
  - The Food and Drugs Authority, Fisheries Commission, and Ghana Standards Authority to prevent the practice of selling imported frozen fish as local fish so that local fishers can get real market value for their catch. This will improve the profitability of the industry.
  - Stakeholders and institutions to collaborate, prioritize and agree on issues to improve the sector, instead of the current independent and uncoordinated actions.
  - Government, through the Fisheries Commission, to remove the subsidies on fisheries that are fuelling increased fishing effort and the resulting decline in fish stocks, and invest in structural improvements of the fishing sector and enhanced data collection, for better decision making and profitability of the sector.
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*Fishers pushing their boat into the sea (Photo: Obiri Awuah Kwaku)*

## Impact Area 3

### Greater risk of loan defaults and reduced access to finance for the fishing sector

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#### What is the impact?

- The fisheries sector relies heavily on loans but access to credit has been negatively affected by COVID-19 (survey: 78%).
- With the lockdown at the beginning of 2020, businesses performed badly, reducing the willingness of the risk-averse financial sector to finance the fisheries sector.
- At the same time, a crisis in the banking sector affected many small financial institutions that were heavily patronized by the fisheries sector, further aggravating the situation.
- The high risk is real - while the loan repayment discipline of fishers is generally low, it was magnified by COVID-19 (survey: 49%).
- The major source of credit for boat- and net owners is usually from fishmongers and traders (about 70%) Crew borrowing from them and increasingly defaulting in the repayment of their debts, affecting the entire fisheries value chain.
- Due to the risks involved, interest rates are usually very high - between 30% and 100%.
- Under this strain, exacerbated by the effect of COVID-19, investments in the sector have dropped (survey: 66%). Lack of familiarity with the fisheries sector and the (perceived) high risk associated with the fishing business scare potential investors.

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#### Short term actions

- Government to support the fisheries sector using funds from the Fisheries Development Fund, as enshrined in the Fisheries Act 625 (2002).

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#### Strategic interventions

- Fishers to form cooperatives (artisanal, semi-industrial fishers and gear owners) for the mobilization of internal capital to fall back on in times of need, instead of relying on the financial institutions.
  - Government to facilitate the establishment of specialized banks and financial institutions dedicated to financing fisheries' activities, e.g., strengthen and facilitate the Agricultural Development Bank to provide services at low interest rates.
  - Fisheries Commission to improve canoe registration data so that canoes can serve as collateral in loan applications of fishers.
  - Financial institutions and non-governmental organizations to provide financial literacy training for fishers to enable them to better manage their incomes and develop a savings habit.
  - Fisheries Associations to take the initiative to request funds from the Fisheries Development Fund for capacity building, and encourage fishers to go into alternative and supplementary livelihood ventures, such as farming, livestock and poultry rearing, or salt mining.
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## Impact Area 4

### Rise in illegal practices and decrease in law enforcement

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#### What is the impact?

- Due to COVID-19, the presence of law enforcement agencies to enforce existing rules and regulations has been negatively impacted (survey: 62%).
- The Fisheries Commission, responsible for the prosecution of illegal, unreported and unregulated (IUU) fishing practices, is heavily understaffed.
- The low compliance with protective measures (social distancing, masks, hand washing) in the fisheries sector, owing to difficulties in implementing the measures at sea, or to beliefs that salt water would protect them, or that COVID-19 would only infect the rich, has enhanced fear among fisheries authorities of contracting COVID-19.
- For the industrial fishers, who experienced some enforcement of COVID-19 protocols, distance to COVID-19 testing centres, high costs of tests, and delays in the release of test results have created severe challenges.
- In the artisanal sector, where testing is not mandatory, government personnel have been less present at beaches and harbours due to the perceived higher risk of being infected with COVID-19.
- Stakeholders reported a negative impact on restrictions and measures in place to fight against illegal practices in the sector, e.g., light fishing; wrong mesh sizes; and 'saiko', where semi-industrial and industrial fleets tranship their bycatch to artisanal fishers (survey: 64%).
- Although chief fishermen are active on many beaches and landing sites throughout coastal Ghana, there is no legal backing for them to enforce fisheries laws. Almost half of the artisanal fishers in the survey indicated that support from local leadership (i.e., the chief fishermen) had increased or remained unchanged during the COVID-19 period.
- Where COVID-19 protocols had been followed, the indiscriminate disposal of masks and other COVID-19 personal protective equipment contributed to marine pollution, which is already a great challenge, especially in nearby densely populated areas.

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#### Short term actions

- Government to reduce the cost of COVID-19 tests and move the testing and quarantine facilities closer to fishers.
- Government to collaborate with stakeholders in the fisheries sector to develop protocols for COVID-19 that are specific to the sector.

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#### Strategic interventions

- Government to strengthen traditional institutions for co-managing fisheries, such as that of the chief fisherman, by backing their activities with legislation.
  - Government to increase the staff of the Fisheries Commission and motivate them to provide extension services in the fishing communities to reduce IUU activities.
  - Community watchdog groups to be established and resourced to ensure compliance of fisheries regulations to reduce IUU activities.
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# Dashboard

Level of impact of the COVID-19 pandemic and related restrictions and measures - Outcomes of a survey conducted in May 2021

Survey questions were rooted in the [integrated food system and sector framework](#), which also provides the structure of this dashboard.

## Color coding

- Severely negative impact
- Moderately impact
- Slightly negative impact
- No significant impact

Socio-economic drivers	
Community gatherings	Number of conflicts

Socio-economic outcomes	
Sector profitability	
Household income received outside the sector	

Regulation	Coordination	Investment
Sector restrictions and measures	Communication within the sector	Sector investments
Presence of law enforcement agencies	Collaboration within the sector	Government subsidies
Activities of Fisheries Commission	Sector vision	Infrastructural sector projects

Stakeholder organization	
Meetings with local leadership	Support received from local leadership

Service provision		
Access to credit	Affordability of fishing gear this season	Access to processing inputs this season
Ability to repay loans	Affordability of premix fuel	Activities of zonal officers

Food & nutrition security outcomes	
Fish prices this season	
Availability of locally caught fish this season	
Availability of imported fish this season	
Food prices	
Consumption of nutritious food	

Production	Value chain development
Fishing effort this season	Cost of transportation for fish
Seasonal migration to neighbouring countries this season	Processing activities
Availability of crew this season	Post-harvest losses

Consumption	
Number of buyers (demand) this season	

Environmental drivers	

Environmental outcomes	

## Rapid Assessment of the marine fisheries sector in Ghana

Amidst the worldwide COVID-19 crisis we currently face, and the socio-economic effects of coping measures, specific attention and actions are needed to secure agricultural production for income, employment, and food security and nutrition, i.e., to safeguard the continued functioning of the food system. For the near and mid-term future, it is important to ensure the production and marketing of agricultural commodities will continue in the best way possible under the prevailing circumstances. This requires assessing how the COVID-19 containment measures and other indirect results of the pandemic affect individual agricultural sectors, and take action to minimize negative impacts on the functioning of agricultural sectors within the larger food system. Through a collaborative effort, involving a broad range of sector stakeholders, a rapid assessment of the marine fisheries sector in Ghana was conducted to propose adequate responses to the challenges that were identified. The rapid assessment contributes to developing short-, mid-term and strategic actions and interventions that will enhance the sector's resilience and support the continuity of activities within the sector, taking into account the unpredictability of the crisis. More details on the methodology and steps used in the rapid assessment and development of the current document can be accessed through this [link](#).

### Purpose

The rapid assessment aims to assess the impact of the COVID-19 crisis on the functioning of the marine fisheries sector in Ghana. Further details on the rapid assessment project can be accessed through this [link](#).

### Rapid assessments in other sectors

Working with a similar model of rapid assessment in various sectors and countries over a time series allows for interpretation and synthesis of the impact of the COVID-19 crisis on food systems at national, regional, and global levels. It identifies coping strategies, and immediate and practical actions required to address emerging challenges. It furthermore provides insights into the use of sector transformation as a diagnostic tool supporting strategic development, planning and identification, and monitoring interventions that aim to enhance the functioning and resilience of agricultural sectors and food systems.

## Partnership

The rapid assessment is facilitated by WCDI and conducted in close collaboration with Wageningen Economic Research; the Department of Fisheries and Watershed Management at Kwame Nkrumah University of Science and Technology, Kumasi; and the Department of Marine and Fisheries Sciences at the University of Ghana in Legon, Accra. For the implementation of the assessment, the partners are further joined by Ghana National Canoe Fishermen Council, Ghana Inshore Fishermen Association, Ghana Industrial Trawlers Association, Ghana Tuna Association, and the National Fish Processors and Traders Association.

### Contributing organizations

The rapid assessment of the marine fisheries sector in Ghana involved representatives of the following organizations in the survey and focus group discussions: (a) artisanal fisheries - Ghana National Canoe Fishermen Council, and Ghana Inshore Fishermen Association; (b) industrial fisheries - Ghana Industrial Trawlers Association, and Ghana Tuna Association; (c) fish processors and traders - National Fish Processors and Traders Association; (d) non-governmental organizations - Hen Mpoano, and Central and Western Fishmongers Improvement Association; (e) government and extension - Fisheries Commission (zonal and regional officers); (f) financial institutions - Fiaseman Rural Bank, Sinapi Aba Savings and Loans, Asa Savings and Loans, and Talent Microfinance; (g) input providers - labourers, carriers and packing gangs; and (h) universities - University of Ghana, and Kwame Nkrumah University of Science and Technology.





Administering the impact assessment survey (Photo: Benjamin Campion)

This rapid assessment is published within a series of rapid assessments in multiple (sub)sectors and countries, and is part of WCDI Sector Transformation publications.

Responsible team: Marloes Kraan, Benjamin Bety Campion, Francis Kofi Ewusie Nunoo and Flo Dirks.

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**For more information:**

Wageningen Centre for Development Innovation, the Netherlands

[info.cdi@wur.nl](mailto:info.cdi@wur.nl) | [www.wur.eu/wcdi](http://www.wur.eu/wcdi)

**Project lead:** Walter de Boef

**Email:** [walter.deboef@wur.nl](mailto:walter.deboef@wur.nl)

