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REPORT BY THE EXECUTIVE SECRETARY ON HIS EXPLORATION OF
MEANS OF AIDING GOVERNMENTS IN NORTH AFRICA TO DEVELOP THEIR SEA FISHERIES.

1. According to Part V paragraph 44 of the Report of the First Session of the Economic Commission for Africa, the Executive Secretary was called upon to explore means of aiding Governments in North Africa^{1/} to develop their sea fisheries reserves, in cooperation with the specialized agency concerned. In this case, the appropriate specialized agency is the Food and Agriculture Organization of the United Nations (FAO). This agency has been approached and has provided the information upon which the following statement has been prepared.

2. The subject of the development of sea fisheries in North Africa is a very wide one and could be treated in many different ways. It is proposed here to review briefly and in a general way the magnitude of the industry, some of its current problems and what has been done to aid the Governments concerned in this respect.

Magnitude and Current Problems of the industry:

3. With regard to the general level of fish production and trade in the area under consideration, only Morocco and the UAR (Egyptian Region) have catches of considerably commercial significance. In the case of Morocco, a rapid post-war development has been based on relatively abundant

^{1/} The following countries are considered in this document: Morocco, Tunisia, Libya and the Egyptian Region of the UAR. FAO has not worked in Algeria.

stocks in the Atlantic and entry into export trade which has recently become increasingly competitive.

4. Accurate figures of fish consumption are not available in all cases but it appears that the Egyptian Region of the UAR is the only country in North Africa which has an average level of fish consumption comparable to that in southern European countries, and in this case less than 40 percent of production is derived from marine sources, the rest being from fresh water fisheries. Among the other North African countries the highest consumer is, on available data, Tunisia, where, however, the population appears on the average to derive less than 5 per cent of its animal protein and less than 1 per cent of its total protein from fish. In the remaining countries the figures point to a lower level of consumption. These are average figures for the whole population, but they do reveal that the present domestic market for fish is quite limited. Many factors enter into this, not the least of which are associated with internal distribution. In addition, it is well known that the Mediterranean is only moderately rich in fish and some areas are already overexploited. Investigations carried out by FAO, and outlined below do reveal, however, that a great deal could be done to raise supplies available for consumption by better organization of the industry and the use of more up-to-date methods and equipment for catching as well as for handling and distributing the catch.

Assistance provided by FAO in the field of Fisheries:

5. The Food and Agriculture Organization has established and maintained contacts in North Africa through the General Fisheries Council for the Mediterranean, through visits of headquarters and regional officers through the Expanded Technical Assistance Programme (ETAP) and recently through requests to the United Nations Special Fund. The General Fisheries Council for the Mediterranean was founded in 1952 and all North African countries, with the exception of Libya, are members. The Council meets every other year and its activities continue between sessions in Standing Committees.

6. Technical assistance has been provided to Egypt (UAR), Libya, Morocco and Tunisia.

7. Technical assistance under ETAP in the Egyptian Region of the UAR commenced in 1954 and concentrated on a study of inland waters. Since 1957, a master fisherman has been working mainly on the Red Sea coast, demonstrating improved methods of catching fish and the use of small mechanized craft. The expert has completed his work but the report had not been completed when this statement was prepared. Since 1957 a fisheries statistician has been engaged in developing an entirely new system of collecting and collating fisheries statistics based on sampling techniques. It was considered that adequate statistics are essential for an understanding of the basic structure of the industry and for realistic planning of development programmes. An interim report issued in bulletin form in August 1958 sets out a technical description of the sampling design and the results of some of these investigations. It was intended for the use of fisheries statisticians, administrators and research workers in the UAR and in other countries faced with similar problems.^{2/}

8. Libya first received technical assistance in fisheries from FAO in 1951 when an expert advised on fishing development with special emphasis on sponge fishing.^{3/} The expert recommended the establishment of a Fisheries Section in the Government, the training abroad of two specialists and the creation of a marine and fishing school at secondary level as well as incentive loans to fishermen and processors. He also advocated longer term loans for modern boats and the construction of a refrigerated store. Creation of cooperatives for sponge fishermen was also proposed.

^{2/} Sample surveys for the improvement of Fisheries Statistics in Egypt. V.G. Panse, K.V.R. Sastry, FAO, Cairo, 1958.

^{3/} FAO Report No.18 to the Government of Libya on "The Fisheries of Libya". C.D. Serbetis, Rome, November 1952.

9. A second expert, with broader terms of reference, worked in Libya from 1956 to 1958. He considered the whole industry including tuna sardinella mainly for export, fishing for local consumption and the sponge industry. His final report^{4/} contained a survey of the status of the fisheries and recommendations regarding steps necessary as a pre-requisite to further development. He stressed the need for improving the quality of the fresh and canned fish exported and of improving domestic marketing conditions as well as stimulating local demand. Lack of skilled manpower is a general handicap and improved training and social security is needed if the indigenous industry is to be fostered. Increased local investment and greater security for foreign investment is recommended; also the legislative basis of the industry requires revision and there is need for a small fisheries administration. A number of recommendations for further types of technical assistance are also included. The expert reached the general conclusion that potentially the industry could be developed but this depended on the amount of effort and investment applied and the priority given by the government to fisheries in relation to other industries.

10. In Tunisia, FAO technical assistance in fisheries has been in progress since 1957 when a general fisheries adviser was appointed. As no main aspects of the assistance have been finalized, it is difficult to reach conclusions. The fisheries adviser has been assisting the Government with a wide variety of problems associated with the reshaping of the fisheries **service** and a number of fishery development projects. Emphasis is now being placed on accelerating technological improvements in catching, processing and distribution. He is collaborating closely with the fisheries expert supplied by the ICA under U.S. Bilateral Aid.

11. A master fisherman has been making short visits to Tunisia to demonstrate light fishing equipment for sardines and to train fishermen

^{4/} FAO Report No. 817 to the Government of Libya on "The Present Situation of the Libyan Fisheries." Rome 1958.

in the use of submerged lights. He has also explored for trawl grounds and given training in deep trawling.

12. A fish processing technologist is expected to follow up in 1960 the visit of an FAO staff member, to introduce methods of producing low-cost food from sardine and sardinella which cannot be canned for export.

13. In Morocco, direct aid by FAO in the field of fisheries has been confined to inland fisheries. An agricultural economist, however, worked in the country from 1957 to 1959 and reviewed the problems of agricultural economic development including marine fisheries. Domestic consumption of fish is quite low and the industry in the main is not advanced. There is, however, a modern sardine canning industry on the Atlantic coast but the internal demand is low and the product is facing considerable competition in export markets. The expert recommended that the Planning Bureau should consider the possibility of a fish flour industry, of improved methods of catching particularly larger types of fish, of improved marketing and transport of fresh, frozen, salted, dried and smoked fish, of introducing fish in hospitals and other public institutes and of promoting consumption among the general population.

Measures for the improvement of Fisheries.

14. On the basis of detailed field experience gained by FAO over a period of years in North African countries, it appears that a number of development measures would be effective in most of the countries concerned. Improvements seem to be particularly necessary in the administrative and legislative field including the organization of the industry, in transport, preservation and other aspects of marketing, in the training and equipping of the fishing community and in the encouragement of domestic and foreign investment within the framework of general investment priorities. Naturally, the emphasis will vary from country to country. FAO is continuing to supply technical assistance to Governments and outside aid is also available to some countries from other sources e.g. from the U.S. 'Point Four' (ICA).

15. Also relevant in this connection are the conclusions reached in the FAO Mediterranean Development Project ^{6/} though this does not deal exclusively with the North African countries. This report reemphasizes the unfavourable nature of the Mediterranean Sea for fish production and concludes that "it is doubtful if the commercial catch could be increased in the future to an extent that would have a significant influence on the diet of the region.". More hope seems, indeed, to be placed in the development of inland fisheries as a source of protein although it is considered that these " will most probably never produce great quantities of fish." Measures advocated in the Mediterranean Project for developing both marine and inland fisheries are as follows:

(1) The study of resources of the Mediterranean under sponsorship of Regional Fishery Councils and Commissions should be continued, and in many aspects should be greatly intensified. The study in the Red Sea, which so far have been relatively meagre, should also be greatly extended.

(2) The improvement of administrative machinery necessary for the implementation of development programmes including, as first priority in several countries of the region, the establishment of fisheries divisions attached to Ministries of Agriculture. The lack of field services concerned with the collection of information, the communication of planning decisions, and with direct assistance to the industry, must also be remedied.

(3) Further study of the economic conditions of the fisheries industry and the social status of the fishermen in comparison with other occupations. This may determine the success or failure of development projects; and reconnaissance surveys, possibly on a regional basis, should be undertaken before costly schemes are implemented.

^{6/} "FAO Mediterranean Development Project" FAO, Rome, 1959.

(4) Technical measures to improve the management of fisheries include:

- (a) The introduction of regulatory and other measures to bring fishery exploitation into most effective relation with potentialities, and to reduce and, where possible, to eliminate destructive practices, such as pollution of rivers and the use of explosives;
- (b) The prevention of losses at dams and barrages by providing fish passages;
- (c) The development of the resources of inland waters by measures to improve both the basic nutrient status of these waters and the balance between the species occupying these waters.