



THE FISH EXPORT TRADE, CHALLENGES AND OPPORTUNITIES AS A DEVELOPING COUNTRY, A CASE OF UGANDA

Challenges and Opportunities

By Stella Mbabazi

PENICHE, PORTUGAL (WSFC 2023)



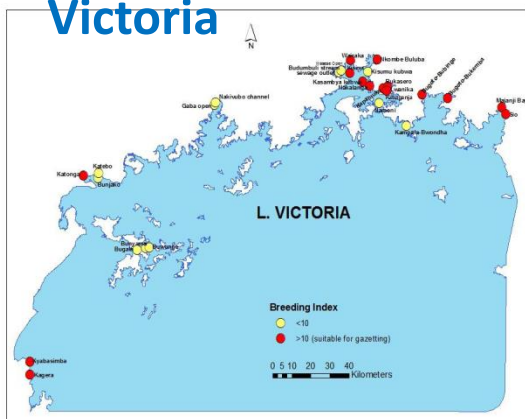
RESOURCE BASE

- ❖ 05 major water bodies and 160 minor lakes.
- ❖ 44,000Km2 (20 % of surface area)
- ❖ Various rivers.
- ❖ Over 250 fish species.

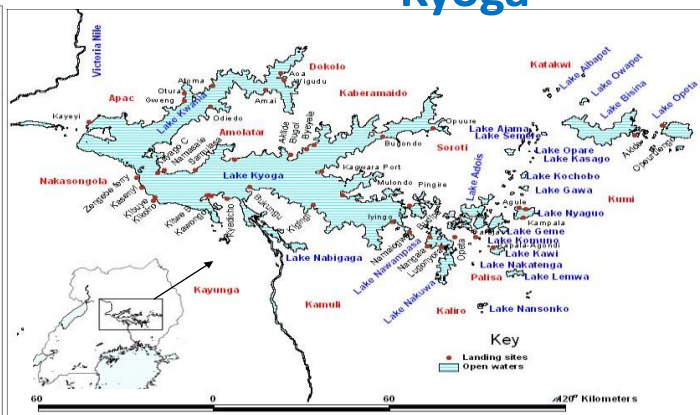
Fisheries sub-sector is characterized by two distinct segments:

- *Capture fisheries*
- *Aquaculture*

Victoria



Kyoga

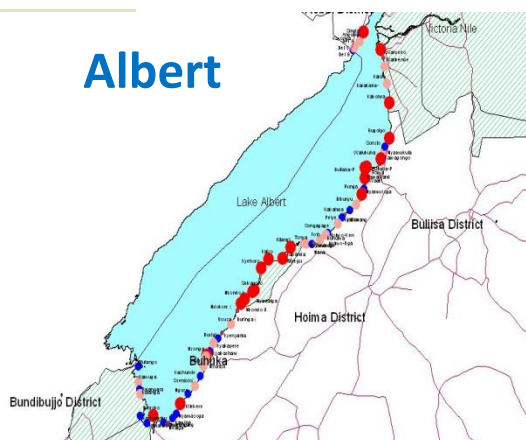


(691) gazetted fish landing sites on 4 water bodies, 22 processing plants

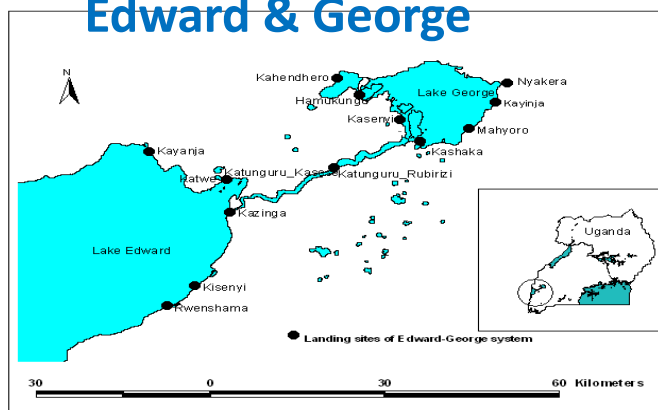
Fisheries sector contributes:

- 3% of GDP
- 12% agricultural GDP
- Livelihood support 5.3 M
- Employment : 1.5 million
- Forex exchange: \$119 M
- Per capita consumption in 10kg/cap

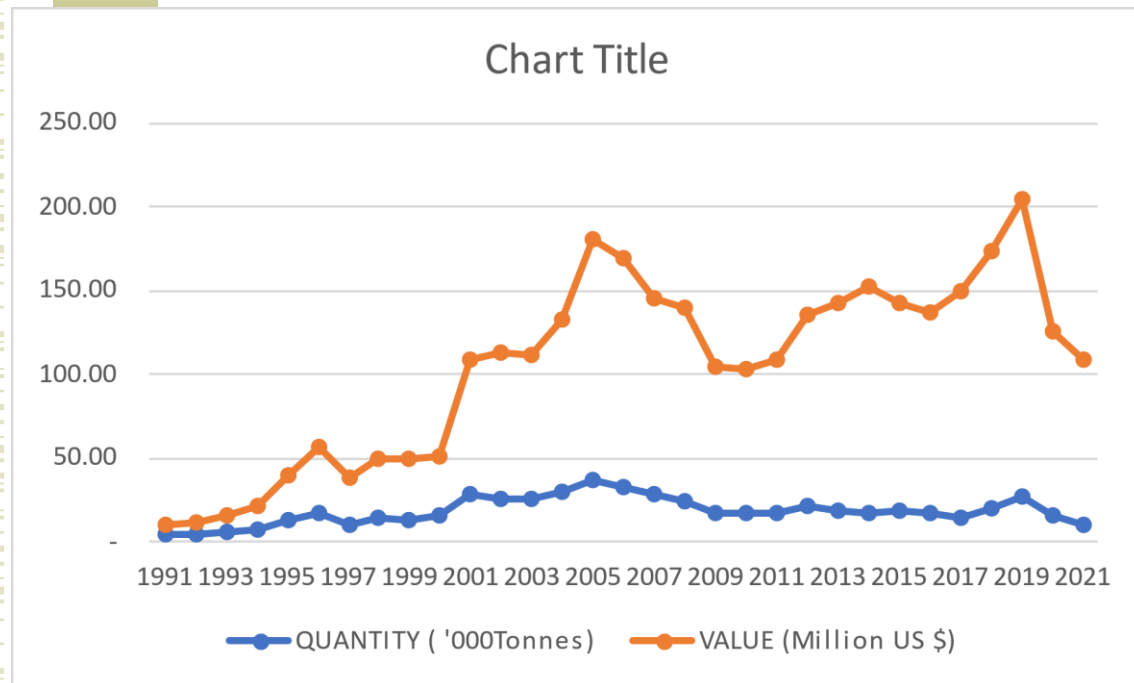
Albert



Edward & George



TRENDS IN FISH TRADE



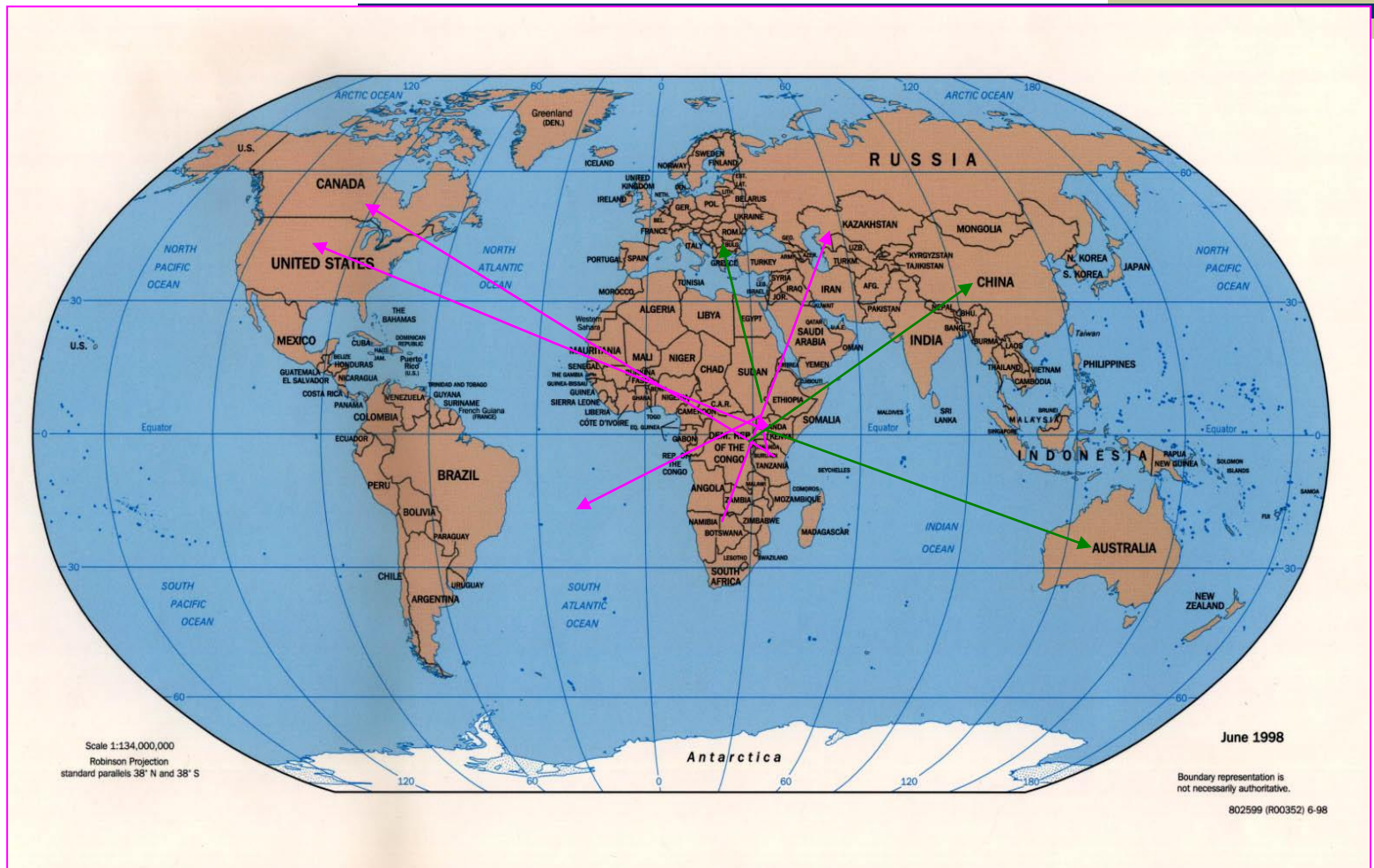
- ◆ Exports to international markets rose from 4,751tons worth \$5.3m in 1991, peaked at 37,000 tons worth \$144m in 2005 but declined to only 14,248 tons worth \$ 136m in 2017, regained in 2019 to 27,173 tons worth 177.6 million but declined again in 2020 due to Covid.
- ◆ Regional trade is 19,000 Worth \$55m

Fish Industrial Processing



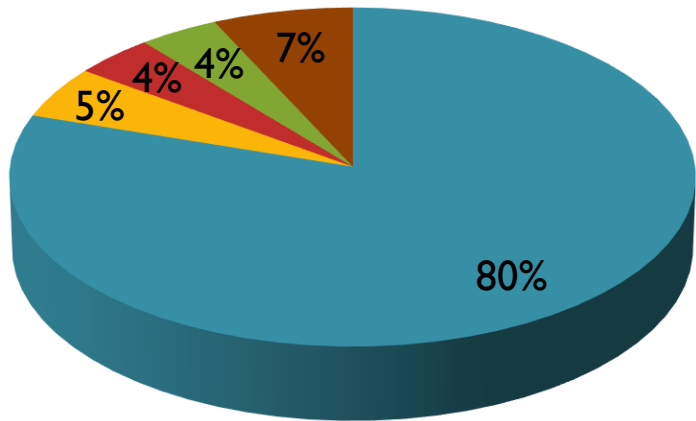
PRODUCTS: CHILLED & FROZEN FILLETS, FISH MAWS, FATS & RED MEAT, SKINS, HEAD & FLANKS, FRAMES, CUBLINS, FISH OIL (Artisanal)

EXPORT ROUTES



FISH PRODUCTS & MARKETS

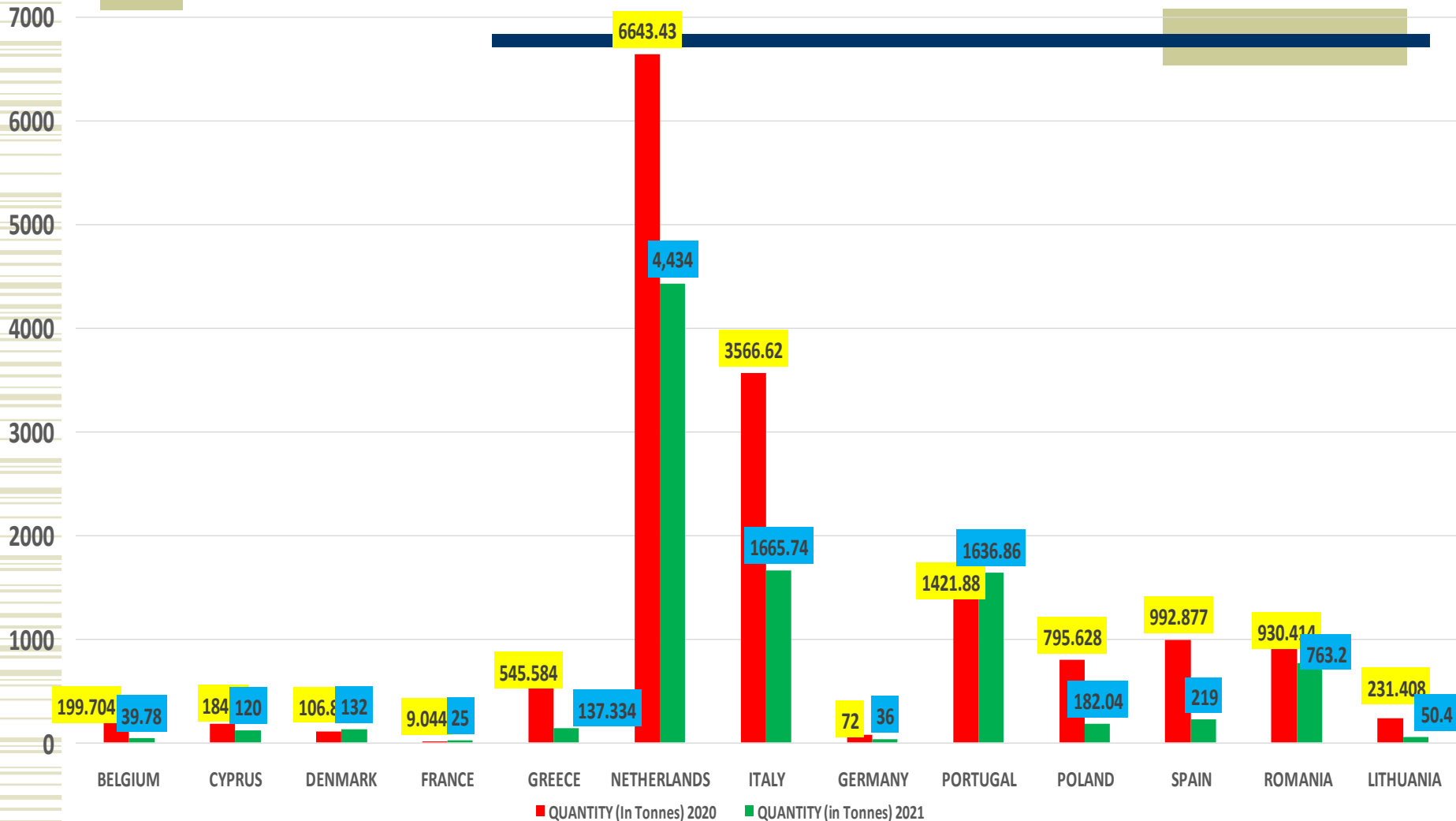
Chilled and frozen fish and fish maws



- European Union
- United Arab Emirates
- Japan
- USA



QUANTITIES OF FISH EXPORTS TO EU MEMBER STATES 2020-2021



Challenges to Fish Trade

- ◆ **High costs of meeting food safety standards** (*Lab tests, production costs*)
- ◆ **Low products cost in the market** (*Low value added-limited catalogue, Small margins*)
- ◆ **Monopoly in the market** (*Specific clients to be sold to*)
- ◆ Unharmonized taxes - regionally
- ◆ Limited capital
- ◆ **Dwindling stocks** (*IUU and high costs of enforcement*)
- ◆ **Underfunding of the sector** (*taxing for treasury*)
- ◆ Unreliable data capturing system

Opportunities to Fish Trade

- ◆ **Strong Political will**
- ◆ **Enabling environment for investment (Policy and legal framework)**
- ◆ **Human resource capacity (CA)**
- ◆ **Raw material availability (Including small pelagics)**
- ◆ **Strong work force**

Conclusion

- ◆ The market requirement to trade more so in the EU obliges CCAs to **enforce controls, standards and regulations to guarantee safety and quality** of products
- ◆ PPP important for continued fish exports to core markets ie EU; **increased foreign exchange inflows , employment , wealth creation &** significant contribution NDP3 which targets to transform the country to middle income status by 2030.

