

How improving quality and standards in the Ugandan fish value chain impacts sustainable development of decent jobs

Executive summary

This brief shows how quality assurance along the fish value chain is critical in ensuring that youth and women have sustainable decent jobs, economic transformation, and fostering agro-industrialisation in Uganda. Findings from the Fish Baraza reveal that, despite the increased participation of both youth and women in the fish value chain, there is continuous adulteration and mishandling of Fish, adversely affecting quality and, consequently, the market for fish. The brief recommends deliberate sensitisation of women and youth to create awareness on the cost of mishandling the fish at the production phase, increasing the number of fish quality control officers to monitor standards, and investing in affordable techniques to enhance quality and standards. Such measures will ensure sustainability of employment of youth and women in the various fish value chains (silver fish, Nile perch and Tilapia).

Introduction

Uganda's fisheries and aquaculture sector provide substantial employment, protein, income and revenue. For example, the sector contributes over 12 percent to agricultural GDP, supplies 50 percent of animal proteins consumed, and by 2017 was employing more than 1.3 million people¹. In addition, the sector has well-established backward and forward linkages with the pharmaceutical industry, food additives, to mention a few (EPRC, 2018). However, increasing human population, high exploitation rate (illegal fishing gear), limited access to fish seeds and feeds, poor handling, as well as continued trade in illicit and unrecorded immature Fish are threatening the fish and aquaculture stocks. If not addressed, these are likely to have detrimental effects on livelihoods, especially on sustainable employment for women and youth involved in the fish value chain.

A critical challenge that threatens employment along the fish value chain is quality assurance. The National Fisheries and Aquaculture Policy, 2017 under 5.5 on Post-Harvest Management, Value addition and Quality Assurance states that *"Government shall guarantee quality, wholesomeness and safety of fish and fish products for human consumption and market access. Additionally, Government shall ensure quality seed and safety of fish feeds for sustainable development of aquaculture"*. Inadequacies in ensuring the quality of Fish and its products not only threaten our health, trade with our regional and international partners, revenues but jobs as well.

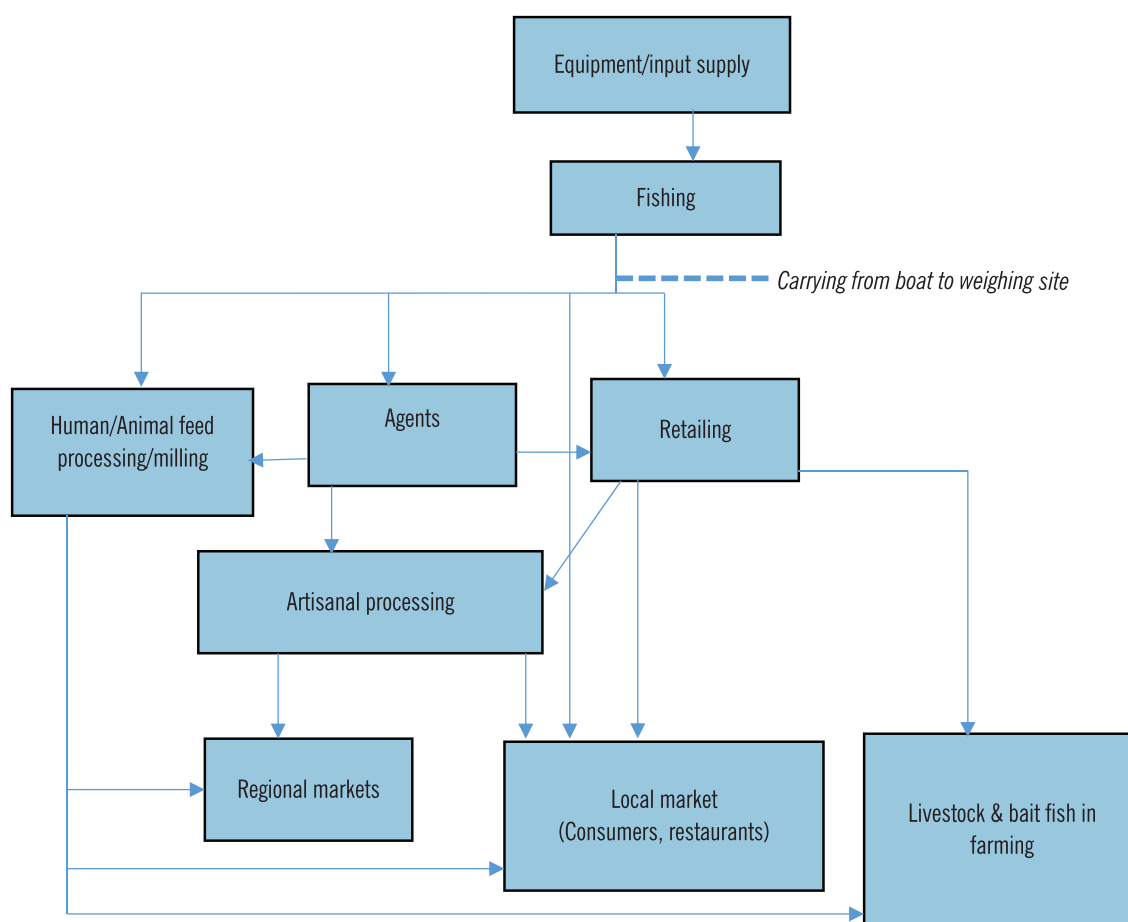
For instance, in 2011, when the European Union (EU) banned all fish exports from Uganda due to poor quality and standards with no clear labelling, about \$280m (about UGX784b)² was lost. In addition, the self-imposed export ban to the EU by Uganda in 2015 had similar effects on revenue losses. These actions stemming from poor adherence to quality and standards had ripple effects on employment as industries and local exporting businesses had no incentive to produce with no market.

This policy brief draws on the critical findings on quality and standards identified from a town hall Baraza held on December 14, 2020³, on *"Enhancing agro-industrial value chains for productive and decent work for youth and women in Uganda: a case of fish"*. The Economic Policy Research Centre (EPRC) convened the Baraza with support from the African Policy Dialogues of the INCLUDE platform.

Key findings

Immense opportunities for women and youth exist along the fish varieties value chains. As revealed in the Baraza, the Silver, Nile Perch and Tilapia fish value chains are different. Nonetheless, all these have opportunities for women and youth. Using the silverfish value chain (Figure 1), it was identified that 97 percent of male youth aged 18 to 35 years were involved in the fishing (production) and carrying of the catch from the boats to weighing

Figure 1 Silverfish (Mukene) value chain



Source: Authors own construct based on town Hall Baraza, 2020

stations activities. Given that physical strength was the essential requirement, with no specialized skills, more youth participated in these stages of the value chain. While 97 percent of women were in the trading of fresh Fish, about 90 percent were in deep frying and sun-drying businesses as a form of preservative. Equally, women (over 90 percent) were in the packaging and marketing nodes of the Silverfish value chain. In contrast, fewer women were in the marketing end of the Nile Perch and Tilapia value chains due to the higher financial investment requirements that the latter two require (EPRC, 2021).

Continuous adulteration and mishandling of Fish is perverse due to limited mechanisms to adhere to quality and standards.

Missing technologies in fish catch, storage, and drying heavily affect the quality and standards of silver fish, tilapia, and Nile perch varieties. For example, Baraza discussions revealed that the youth have made it a habit to mix sand with Mukene to gain more

kilograms. This has adversely affected the quality of the Fish plus prices, and as a result, it has created mistrust between sellers and buyers of Mukene. The prevailing laxity exacerbates the required supervision from quality controllers. In addition, the lack of modern drying technologies during the rainy season further compromises the quality, leading to enormous losses. A participant from a women fish processors association said that:

“A Kilogram pack of Mukene snack goes for UGX15, 000 whereas the normal quality fetches between UGX6, 000 to UGX7, 000”. Mukene snack is exported to countries like UAE specifically the city of Dubai; Kenya, and Rwanda, however the major hindrance is the fact that UNBS has not yet certified these products mainly because they do not have the infrastructure needed before certification.”

Key informant, Women Fish Processors Association, 2020.

Plate 1: Baraza participants engaging in fish value chains discussions



Source: EPRC, 2020

Yet, only grade one of silver fish/Mukene is milled. As emphasised by a Baraza participant:

“Milling is for first-grade silver fish only. It involves cooked, smoked and plain (sundried Mukene). From the boat, it is washed mainly by the youth, it is then steamed and spiced by mainly women and youth, dried (youth and women) before it is marketed. Small-scale processing factories for Mukene are involved in the entire value chain plus marketing, e.g. from door to door and other marketing methods are key at this stage.” Baraza participant, 2020.

It was noted that boats could spend days or many hours (daily) in the waters before docking at the landing sites while collecting Tilapia and Nile Perch fish varieties from different landing sites. Implying that, if timing is not managed and storage/preserving facilities (while on water) are not up-scaled, it consequently affects the quality of the Fish (PH levels). It was also noted that upgraded drying or smoking fish technologies were limited as stakeholders used local technologies that affect fish quality. Moreover, fish quality assurance officers are also few to enforce adherence to standards.

Relatively low skills are required to participate in the fish value chain. From the Baraza, while the male youth offload, wash, sort and carry the Fish for weighing, women majorly trim, shape and pack due to the patience and attention to detail the stage requires. All these jobs/activities only need physical fitness and energy, and willingness to work. In this regard, more fish production for marketing implies steady jobs for persons with low literacy rates given the low skills requirements to perform these jobs. The factory, filleters and skimmers jobs are mainly conducted by youth (70 percent males and 30 percent females). Noteworthy, skills in filleting are always acquired on the job with supervision.

Conclusion

As demonstrated by the Baraza discussions, despite the fisheries and aquaculture sector being vital in availing employment opportunities and a good source of revenue, meeting quality and adherence to standards remains a big challenge. Yet this is an essential issue outlined in the National Fisheries and Aquaculture Policy, 2017. As noted, the fish value chain absorbs many youth and women, given the low skills required to participate in the various stages of the value chain. However, adulteration and mishandling of Fish, especially by the youth who aspire for high weight to fetch high prices, needs to be addressed. Such a move will cost Uganda the local and international markets resulting in severe job losses when fish bans are placed on its products due to poor quality and standards. Notably, the capacity of the fish officer to enforce the requirements set out in the fish policy remains low.

Policy recommendations

Create awareness among the youth and women on the cost of mishandling the Fish at the production phase. The youth and women need to be sensitized about the benefits of maintaining fish quality through a mindset change programme. This will not only bring back trust among the local fish consumers but also open doors for exports. Sensitization can entail aspects, among others, fish catch handling, fish storage and preservation.

Increase the number of fish quality control officers to monitor standards along the value chain. The capacity of the current fish quality control officer is low hence the need for Government through the Uganda National Bureau of Standards to train new persons to cover the gaps. This will support the enforcement of the quality assurance rules such as the 2017 statutory instrument. In addition, clear standards should be put in place, especially where they are non-existing or not clear, for example, the fish maw business.

Invest in affordable techniques to enhance quality and standards. Key among these are fish drying technologies such as indoor solar driers that can also work during the rainy season to minimize losses. In addition, packaging skills and techniques of making better packaging materials like paper bags can also boost quality and open doors for exports regionally and internationally.

References

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Endnotes

- 1 The New Vision. (2020, January 29). Fish industry rebounds after near collapse , Retrieved from The New Vision: <https://visiongroup.co.ug/supplements/2020/01/29/fishing-industry-rebounds-after-near-collapse/>
- 2 The Daily Monitor. (2011, September 07). EU moves to ban Uganda fish exports, Retrieved from The Daily Monitor: <https://www.monitor.co.ug/uganda/news/national/eu-moves-to-ban-uganda-fish-exports-1499610>
- 3 The baraza interactively engaged both youth and women involved in the fish value chain from the districts of Jinja, Buikwe, Mayuge and Namayingo and participants ranged from fishing communities and associations, fish processing factories, to local government fisheries departments.

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