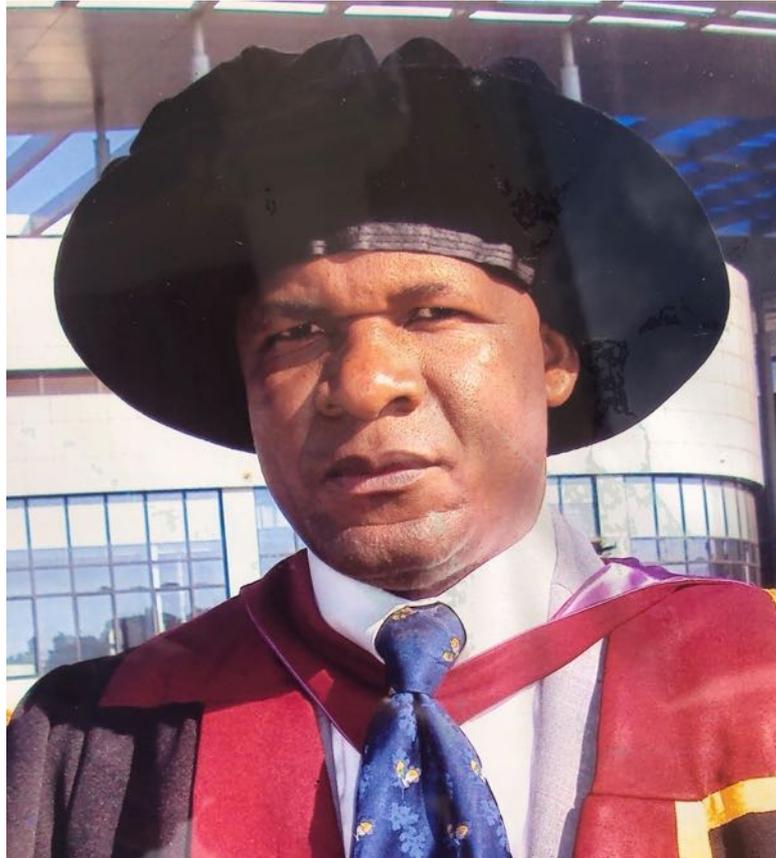


GUEST EDITORIAL

CHASING MALAWI FISH: THE IRONY OF LOCAL FISH SCARCITY VS EXPORTS



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Introduction

Fish and fishery products are an important source of dietary animal protein and food security in Malawi - a land locked country in southern Africa [1] (Figure 1). In the 1970s, fish provided about 70% of the animal protein intake of the Malawian population and 40% of total protein supply for the country [2]. These statistics have tremendously declined in the past 3 decades as a result of the decline in catches coupled with rapid population growth [3]. Current contribution of fish to the country's animal protein supply now stands at 28% [4]. The fisheries sector also provides employment to many Malawians directly or indirectly such as being involved in either fish processing, fish marketing, net making, boat building and other related activities [5]. Further, fish and the fisheries sector constitute a source of income for the people of Malawi. Commonwealth/GTZ [5] reports a local revenue of about US\$ 24 million from fish sales annually with fisheries contributing about 4% to the country's National Gross Domestic Product [6].

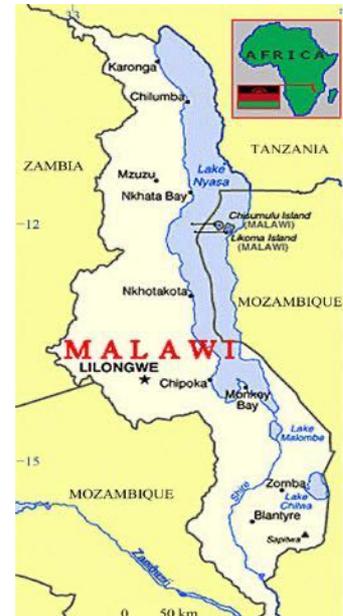


Figure 1: Map of Malawi

National Fisheries Development Priority

Lake Malawi is probably the only lake with highest fish biodiversity in the world, accounting for about 4% of the world's fish species and 15% of all identified freshwater fish species [7]. The government of Malawi, thus, recognizes the importance of fisheries and the need to increase productivity and consumption of fish to promote economic growth and food security in the country. The country included in its 2011-2016 Growth and Development Strategy (MGDS) a plan to increase fish production [8].

The need to understanding local fish consumption demand in the context of declining fish supply

Total domestic fish production in Malawi averaged 70,000 MT per year for the last decade [3]. However, average per capita annual fish consumption is now estimated at 5.6 kg from the previous 14 kg in the 1970s. Reports indicate as low as 3.6 kg as of 2001 which is still far below the 13-15 kg per capita supply recommended by the World Health Organization [9]. Due to the importance of fish in Malawi (nutrition and socio-economic), the need to critically analyse and understand fish and fish products demand and consumption patterns is indispensable for policy measures in the fisheries and aquaculture sector [10]. Responses of fish demand to changes in prices and incomes are important in analysing the effects of any technological change, infrastructure development or economic policy on future production, consumption and trade of various fisheries products [11].

Malawi: the paradox of fish import and export

Increasing demand for fish and fish products in Malawi has triggered an inflow of fish unregulated imports into the country. In fact, cross-border fish trade in Malawi appears to be highly uncoordinated and informal and statistics are sketchy. There has been a high proportion of imported dried fish (*Tilapia* and *Barbus* spp) from Tanzania over the

past decade, which has dominated markets in some towns such as Mzuzu, Kasungu, Lilongwe and Limbe. Dried Kapenta from Zambia and small, frozen marine pelagics also are being imported [2]. Dried 'Tchenga' fish imported from Mozambique (Cahora Bassa Dam) is also common at Limbe market in Malawi. According to COMSTAT data, Malawi imported 3,200 MT of fish valued at US \$1.2 million in 2008 [2]. Imported fish from Tanzania and Mozambique represented 79.6% and 14.2% of the total in volume (93.8% in total), 31.8% and 31.1% in value, respectively. The country imports fish such as the Horse mackerel, Lake Kariba small *Barbus* species locally known as *kapenta* and some farmed tilapia fish.

Despite the huge demand for fish locally, Malawi fish continues to export fish although statistics show a gradual decline [10]. In fact, Malawi is among the countries in Africa where movement of fish is not highly monitored due to among other reasons, poor trade regulations [10]. Data of fish export could thus be higher than reported due to poor documentation as a result of increasing informal cross border fish trade. Informal fish exports with neighbouring countries such as Zambia, Tanzania, Mozambique and beyond, still remain a challenge. Reports for example, indicate an estimated 8 tons of fish crossing the border informally to Zambia per month through the porous and unguarded routes [10]. Traders export fish to many countries such as South Africa, Zambia, Zimbabwe and even overseas [11]. Exports of processed fish products (usually dried) from Malawi to neighbouring countries seem to be unrecorded and, therefore, go unaccounted for. Some exports of processed fish products also are basically re-exports (imported into Malawi and then exported to other neighbouring countries) such as frozen shrimp and prawns, trout salmon, cod fish and flat fish [12]. According to COMSTAT data, Malawi exported 33 MT of fish valued at US \$293,000 in 2008. The main export market in the region is Zambia (34.5% in volume but only 1.9% in value) while the second is Germany (20.9 % in volume and 29.0% in value). This refers to ornamental fish, which peaked at US\$1.5 million in 2006 [12].

The irony of fish scarcity in a land of plenty

Malawi has a huge potential of producing enough fish for the population and excess for export. The country is endowed with many water bodies, chiefly Lake Malawi with a water area of about 30,000km² and other smaller lakes including a network of large rivers and streams. It is, therefore, surprising that Malawi is actually among the significant importers of fish from neighbouring countries mainly Zimbabwe and Zambia and even as far as China.

Conclusion

This editorial attempts to stimulate a discussion among fisheries, trade and economic experts in Malawi and the sub Saharan region even beyond, regarding their understanding of this irony and consequently brainstorming on policy that can effectively curb such developments in the quest for improving availability and consumption of locally produced fish in Malawi. Questions need to be asked: can we conceive a working policy for management of the fish resources in our water bodies to replace the current co-management which appears to be a failure? Can aquaculture (cage and pond culture) provide a solution in supplementing or substituting the capture fisheries?

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