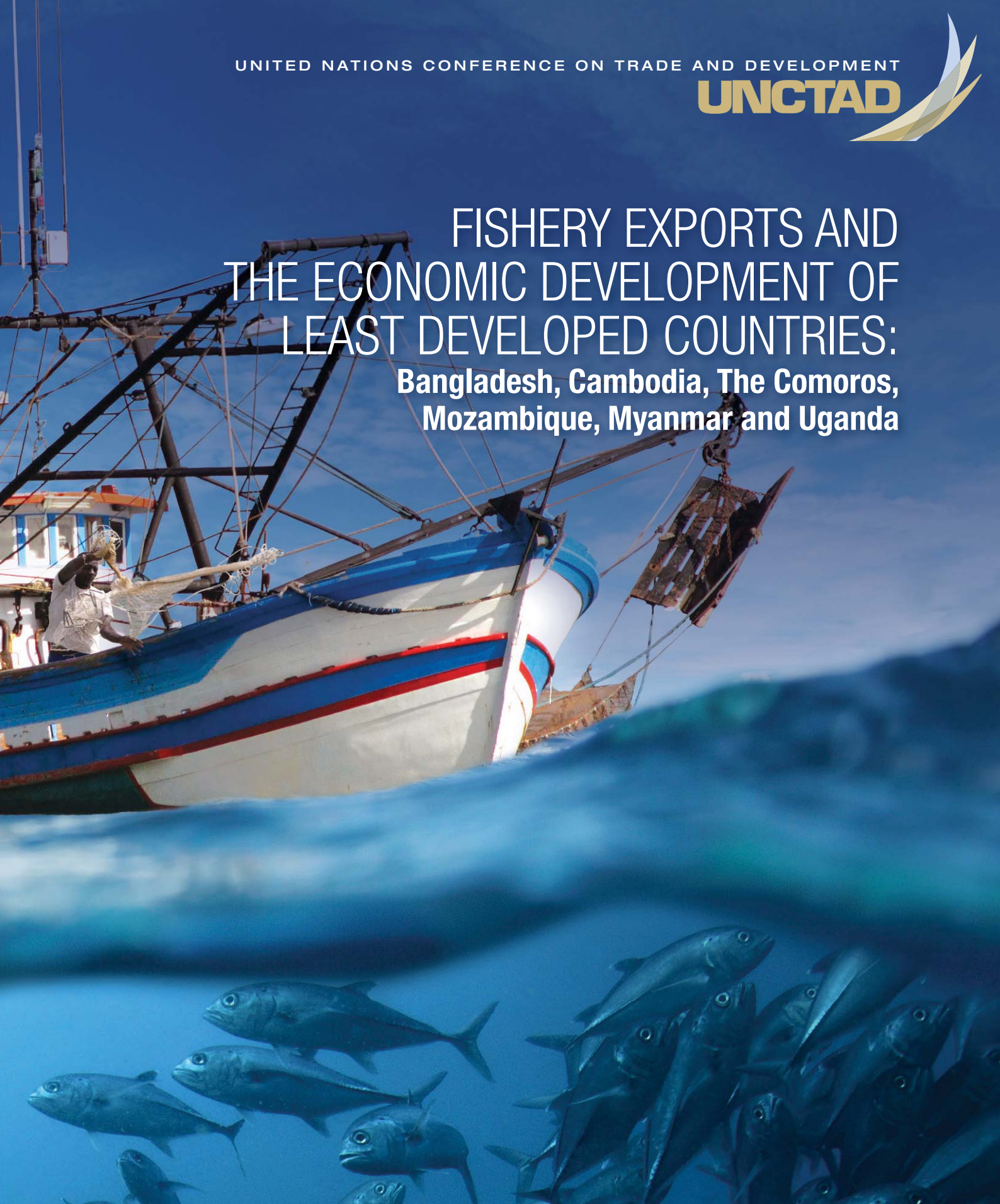




FISHERY EXPORTS AND THE ECONOMIC DEVELOPMENT OF LEAST DEVELOPED COUNTRIES:

**Bangladesh, Cambodia, The Comoros,
Mozambique, Myanmar and Uganda**



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"We believe that a series of case studies conducted by UNCTAD and policy and technical level training organized in Mozambique are of great value in assisting Mozambique in harnessing her fishery resources for socioeconomic transformation."

Mr. Henrique Bongece, Deputy Minister, Ministry of Sea,
Inland Water and Fisheries



Note

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Abstract

There is significant potential for the fishery sector to enhance export competitiveness and diversification and contribute to the overall socioeconomic development of a number of the 48 least developed countries (LDCs).¹ According to the Food and Agriculture Organization of the United Nations (FAO, 2016), of the top 16 producers of inland waters captures in 2003–2012, six were LDCs, namely Myanmar, Bangladesh, Cambodia, Uganda, the United Republic of Tanzania and the Democratic Republic of the Congo, in declining order by capture size. Myanmar was also among the top 10 producers of marine captures in the same period. UNCTAD, in *The Least Developed Countries Report 2006*, identified that in 14 LDCs, fishery exports were ranked in the top five merchandise exports (UNCTAD, 2006). Further research by UNCTAD on the export competitiveness of LDCs emphasized that, despite many complex development challenges facing LDCs, there was considerable scope for them to join the group of successful exporters, including in fisheries (UNCTAD, 2008).

Notwithstanding the socioeconomic importance of fisheries, the sector is often underdeveloped and unexploited. Consequently, while the share of non-LDC developing countries in world fishery exports increased from 34.6 per cent in 1981 to slightly over 50 per cent in 2013; in the same period, the share of LDCs rose marginally, from 1.6 to 3.5 per cent. This was despite the fact that LDCs receive preferential market access in major fish importing countries, particularly in the European Union.

The present study analyses the main supply-side and demand-side constraints that undermine the growth and development potential of the fishery sector of LDCs, with a particular focus on international food quality and safety standards in major importing countries. The study presents evidence from six case studies – Bangladesh, Cambodia, the Comoros, Mozambique, Myanmar and Uganda – and provides policy conclusions and recommendations for action by stakeholders in LDCs and their development partners. The study argues that, if nationally or regionally imposed standards are harmonized, simplified and realigned with internationally agreed standards, and if LDCs receive robust targeted technical and financial support to build their capabilities to meet such standards, there is considerable scope for many LDCs to become successful exporters of fishery products. There is, equally, a need to establish in LDCs pragmatic and forward-looking trade policies that emphasize tapping the potential of their fishery sectors for the diversification of exports. Fishery policies should be fully integrated into and made consistent with overall trade and national development strategies (UNCTAD, 2016).

Keywords: Fishery exports; international standards; least developed countries; Sustainable Development Goals; UNCTAD

¹ Afghanistan, Angola, Bangladesh, Benin, Bhutan, Burkina Faso, Burundi, Cambodia, Central African Republic, Chad, Comoros, Democratic Republic of the Congo, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gambia, Guinea, Guinea-Bissau, Haiti, Kiribati, Lao People's Democratic Republic, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Myanmar, Nepal, Niger, Rwanda, Sao Tome and Principe, Senegal, Sierra Leone, Solomon Islands, Somalia, South Sudan, Sudan, Timor-Leste, Togo, Tuvalu, Uganda, United Republic of Tanzania, Vanuatu, Yemen and Zambia.

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The project has led to the formulation of an UNCTAD manual on upgrading and diversifying LDC fishery exports, and to the organization of national and interregional capacity-building workshops in the countries covered by the project. In addition, an interregional training and capacity-building workshop was organized in Mauritius in April 2017, with 60 participants from Cambodia, the Comoros, Mauritius, Mozambique, Myanmar and Uganda, from the public and private sectors and academia. An intensive training programme was also organized for experts and middle-level managers from the countries covered by the project, at the Freshwater Fisheries Research Centre in Wuxi, China, with financial support from the Government of China. The workshops and training sessions assisted in validating the manual and sharing the findings and conclusions of the present study, and facilitated the sharing of successful experiences and best practices from other developing countries in fishery trade, management and development. The analysis and policy recommendations from the present study fed into the national and interregional workshops, which were particularly important in identifying key priority areas for further action by stakeholders in LDCs and development partners.

The project was implemented by a team consisting of Mussie Delelegn and Benjamin McCarthy, under the overall supervision of Taffere Tesfachew and Guillermo Valles and of Paul Akiwumi, Director, Division for Africa, LDCs and Special Programmes, UNCTAD. Patrick Osakwe, Head, Trade and Poverty Branch, UNCTAD, provided guidance on the overall implementation of the project and valuable input to the present study. Alba Solé Sorribes, Lidet Kebede Assefa, Olamide Oshodi and Jeremie Gingras provided research assistance and technical support for the organization of the workshops at the technical and policy levels. Stephen Golub, Franklin and Betty Barr Professor of Economics, Swarthmore College, Abir Varma, Swarthmore College, and Michael Brat, consultant, provided consultancy services. In addition, the following provided support: Rajalingam Madasamyraja (layout, graphics and desktop publishing); Deniz Barki (editing); Nadège Hadjemian (graphic design); Raul Javaloyes, Yan Zhang and Win Myint. Secretarial and administrative support for the project and in the preparation of the study were provided by Regina Ledesma and Paulette Lacroix.

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