

Voluntary Report – Voluntary - Public Distribution

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Report Name: CDI Seafood Report

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Prepared By: Isaac Yao

Approved By: Robert Tuebner

Report Highlights:

The seafood industry plays an important role for Côte d'Ivoire 's national economy. In 2021, this sector accounted for about 3.2 percent of the agricultural GDP, resulting in a contribution of 0.8 percent to the overall GDP and generated \$114 million in value. Demand for high quality seafood is high, creating an excellent opportunity for U.S. seafood suppliers.

General Information:

Fish consumed in Côte d'Ivoire are predominantly provided by capture fisheries sourced from rivers, large lakes/lagoons, and coastal systems. Aquaculture in one of the fastest growing food production sectors globally, however, in Côte d'Ivoire, aquaculture only contributes a marginal amount to national production. Nevertheless, the seafood sector in Côte d'Ivoire is growing as local demand for fresh fish increases. Rapid population and income growth, diet transformation resulting from urbanization and changing consumer preferences are fueling demand for more seafood imports.

Côte d'Ivoire's economy before the COVID-19 pandemic was booming, after two years of coping with the altered circumstances, there's no sign of slowing down as the economy revives. The projected real GDP is expected to increase 6.5 percent in 2022. The Ivoirian seafood sector is ballooning as countless Ivorian foodie influencers on social media hype up the different seafood dishes chefs throughout the country prepare daily. As tourism in the country starts to pick up once again, hotel and restaurants need high quality seafood to meet increasing demand. Demand for high value seafood products exists in the country, however, Ivoirians are price sensitive which may create an opportunity to promote and sell underutilized seafood species caught in U.S. waters.

Artisanal fishing

Artisanal fishing accounts for roughly 80 percent of the fish found on the Ivoirian market. Artisanal fishermen conduct their activities along rivers, in lagoons and out at sea. Inland fishing for tilapia accounts for one-third of all artisanal fishing production in Côte d'Ivoire.

Offshore fishing is more prevalent near Abidjan (Grand-Bassam and Jacqueville), Sassandra and San Pedro. Due to high demand for fish and favorable prices, 70 percent of offshore production is landed near Abidjan. Major species targeted are small pelagics (sardines).

Industrial Fishing

The domestic industrial fleet previously made up of small vessels that were purchased from developed countries are poorly maintained and prone to accidents, the fleet ceased to operate at profitable levels in 2014. Soon after, Chinese vessels arrived and have since dominated the industrial fishing space. These vessels target fifty or so species of fish, of which the most desired are: skipper (*Galeoides decadactylus*), pageot (*Pagellus bellottii*), razor (*Ilisha africana*), and sole (*Cynoglossus canariensis*). These species account for 30 percent of the total catch while umbra (*Pseudotolithus* sp) and Bigeye grunt (*brachydeuterus auritus*) account for approximately 15 percent of the volume caught. In Abidjan, these high value species are sold fresh.

Tuna fishing is exclusively conducted by an international fleet of large French and Spanish tuna vessels under a fishing agreement between Côte d'Ivoire and the European Union. The skipjack tuna is the most common species targeted, accounting for more than two-thirds of all tuna capture.

Aquaculture

Aquaculture represents a significant opportunity for Côte d'Ivoire to fulfill its protein needs. The country is fortunate to have abundant bodies of water that are suitable for fish farms, however, this sector is heavily reliant on funding from different organizations like the West African Economic and Monetary Union, Food and Agricultural Organization, and the Japan International Cooperation Agency for technical assistance.

The most popular forms of fish farming in Côte d'Ivoire are intensive farming of catfish in lagoon enclosures and intensive farming of tilapia in lagoon floating cages. Most popular cultured fish species include tilapia, catfish and African arowana, however, tilapia are used predominantly for this activity.

Production:

Ivorian seafood production for 2019 was estimated to be 105,219 metric tons (mt). Over the last ten years production has climbed by 60 percent. Artisanal fishing accounts for 75 percent of all catches with production increasing from 33,243mt in 2008, to 73,223mt in 2019. Industrial fishing accounts for 20 percent of all catches and has grown from 12,000mt to 31,996mt. Meanwhile, aquacultural activities contributed a negligible amount to national output with a five percent share in total production.

Aquaculture practices have however, begun to advance, with production increasing 70 percent over the last ten years.

Table 1: Growth of Fish Production, 2014 to 2019 (mt)

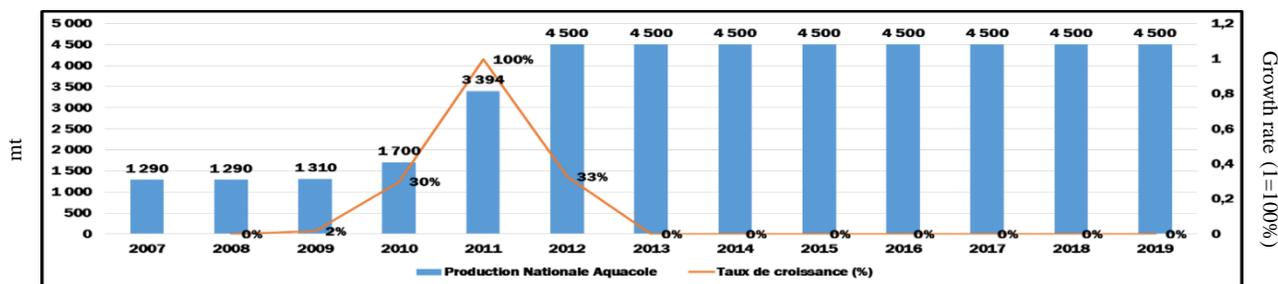
Features	2014	2015	2016	2017	2018	2019
Industrial fishing	26,180	19,211	22,476	20,997	31,212	31,996
Umbrina, pelon, hogfish, and pagellus catch	14,356	7,899	8,417	6,688	17,645	18,709
Sardine	11,824	11,312	14,059	14,309	13,567	9,897
Tuna *						3,390
Artisanal fishing	48,620	79,339	81,757	70,251	74,316	73,223
Marine	41,158	39,084	41,320	35,285	42,474	46,039
Inland capture	7,462	40,255	40,437	34,966	31,842	27,184
Total Production	74,800	98,550	104,233	91,248	105,528	105,219
Growth rate of national production	72%	32%	6%	-12%	16%	-0.9%

Source: Direction des Peches.

* From 2014 to 2018, 99 percent of the tuna catch was shipped to the EU and was not counted as being produced in Cote d'Ivoire.

Côte d’Ivoire was the first country on the continent to establish a tuna processing facility and is currently the world’s second largest exporter of processed tuna. In 2019, these processing facilities employed more than 3,000 people and in a seven-year span have increased production by 38 percent. In 2019, over 25,000mt of tuna was processed in Côte d’Ivoire. Bigeye, yellowfin, and skipjack tuna are the three major species processed for a total revenue of \$100 million.

Figure 1: Growth of aquaculture production from 2007 to 2019



Source: PONADEPA

Most of the tuna caught, around 300,000mt, is exported out of the country. The majority of the tuna canning facilities in Abidjan get their supplies from European fleets operating under the Côte d’Ivoire - EU Fishing Agreement. Every year, approximately 55,000mt is assigned to the three local canneries, while the rest is exported directly through transshipment. Canneries are located in free trade zones in order to benefit from customs exemptions. Tuna is bought by the canneries at about \$1,115 and \$1,700 per mt. The industry employs 3,000 people locally and generates over \$100 million in revenue annually.

Consumption.

For the Ivorian consumer, seafood is the primary source of protein. With a population of 25.6 million in 2019, per capita consumption is approximately 25.49 kg per person. In 2019, Côte d’Ivoire imported 591,059mt of seafood. Post estimates that annual domestic consumption will be over 650,000mt in 2022, which presents a significant opportunity for U.S. fish exports to the country.

Table 2: Import-Export-Consumption of Seafood Products

Features	2014	2015	2016	2017	2018	2019
Import (mt)	312,571	389,560	405,817	482,636	549,233	591,059
Export (mt)	28,701	37,395	26,519	31,226	34,128	38,223
Consumption (mt)	363,171	455,215	488,031	547,148	625,133	654,836
Consumption/habitant /year (kg)	16	19	20	21	24	25

Source: Statistiques DPSP/MIRAH

Distribution:

Fresh seafood is caught in the waters near the cities of Abidjan and San Pedro and in the lagoons and lakes of Côte d'Ivoire. Abidjan is by far the most important marketplace for this industry. Imported frozen fish makes up 82 percent of the overall seafood available on the Abidjan market.

Smoked fish, which is produced by artisanal smokers, is primarily intended for the up country market and dominates the processed fish product industry. Despite the long distances required to reach its destination; smoked fish is highly valued by the citizens of the hinterlands due to its long shelf life. Smoked fish represents over two-thirds of domestic consumption. Main species prepared this way are small pelagics (mainly *Sardinella* and *Ethmalosa*), mullet and tuna. In inland waters, the major species smoked are Chews (*Chrysichthys nigrodigitatus*), Catfish (*Chrysichthys*), tilapia and carp.

Trade

A. World Trade

High levels of imports are needed to satisfy local demand. The quantity of imported seafood has increased by 60 percent over the last five years. Imports come from several countries, however, Senegal (23 percent), Mauritania (24 percent) and China (11 percent) have accounted for about 60 percent of seafood imports over the last five years.

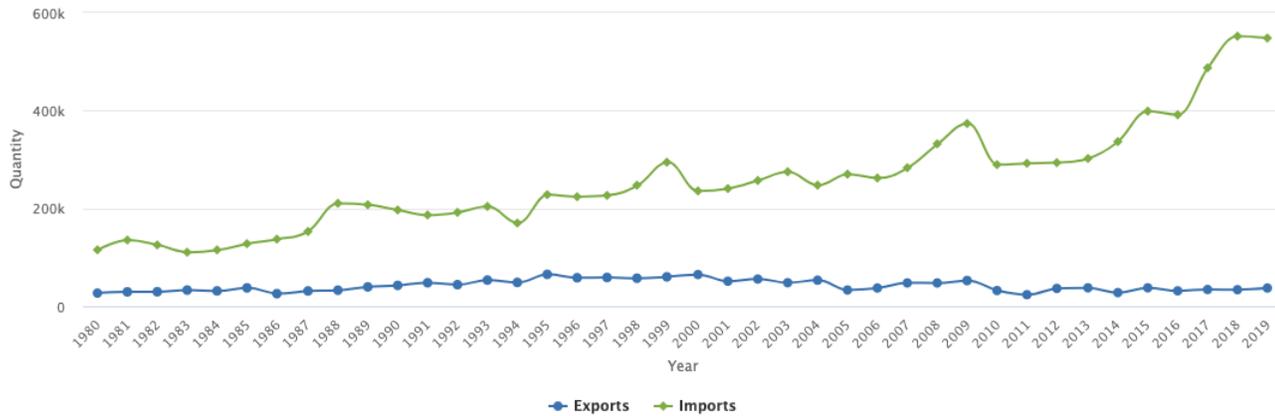
Table 3: Côte d'Ivoire seafood imports by value and country 2018-2021 (USD) (millions)

	2018	2019	2020	2021
WORLD	\$530	\$525.5	\$578.3	\$748.7
Senegal	\$85.3	\$126.5	\$149.7	\$161.3
Mauritania	\$163.7	\$148.3	\$130.5	\$108.2
China	\$55	\$67.8	\$61.9	\$98.8
Chile	\$14.7	\$20.9	\$36.2	\$74.1
Morocco	\$38	\$23	\$40.6	\$56.9
Russia	\$11	\$24.2	\$35M	\$51.9

Source: Trade Data Monitor

Seafood imports by Côte d'Ivoire were valued at \$748 million in 2020, an increase of 95 percent since 2016. Despite this flourishing market, imports of U.S. seafood remain low. U.S exports to the country totaled \$17 million over the last five years. The U.S. seafood quantities entering Côte d'Ivoire are small, however, many Ivoirians recognize the high-quality products the U.S. has to offer.

Figure 2: Total import and exports of fish and fishery products



Source: FAO

B. U.S. Imports

Côte d’Ivoire imported 51,650mt of seafood from the U.S. in 2021 totaling \$406,000. This is down 51 percent from 2020. The majority of U.S. products entering the country is Albacore and Yellowfin tuna products.

Policy:

The Fisheries Directorate (DP) and the Aquaculture Directorate (DA), both of which are housed in the Ministry of Animal Production and Fisheries Resources (MIRAH), are responsible for monitoring all fisheries activities. The Center of Oceanographic Research (CRO), the National Center of Research in Agronomy (CNRA), and universities, which are overseen by the Ministry of Higher Education and Scientific Research, are responsible for research and development in this sector.

Since the 1960’s, many policies have remained mostly unchanged. However, in 2021, MIRAH adopted a new strategic plan called the Aquaculture Development Strategy to improve the Ivoirian seafood sector.

This strategy is composed of multiple strategic lines, namely:

(1) the sustainable and responsible management of resources and (2) the improvement of productivity and competitiveness. The general objective of the fisheries strategic plan is to increase domestic production sustainably and economically by promoting good governance practices and increasing competitiveness among fish producers.

For offshore fishing activities, the strategic plan is credited with creating the Fisheries Monitoring Center (CSP) to combat all forms of illegal, unreported, and unregulated (INN) fishing taking place at

sea. In addition to surveillance, three modernized fishing ports (Locodjro, Grand-Lahou, and Sassandra) were built to improve the working conditions of fishermen and fishmongers.

Regarding aquaculture and in-land fishing practices, the strategic plan focuses on making these activities important routes for increasing economic growth among those engaged in these activities.

Marketing:

Imported seafood is acquired by wholesalers and then distributed to semi-wholesalers and retailers before reaching consumers. The most common imported seafood product is fish, primarily tilapia which represents over 65 percent of all imports. Canned fish (30 percent) followed by tuna, salmon, and shellfish, account for the rest of the seafood products to enter the country.

The seafood import sector is dominated by a dozen companies equipped with cold storage facilities. Over 60 companies are licensed to import seafood, but most are not active. The largest importer in this sector is CODIPAC. They represent over 40 percent of all imports into Côte d'Ivoire and have a network of refrigerated rooms in many retail locations throughout the country. They also possess refrigerated trucks which facilitate the distribution of seafood products to semi-wholesalers and retailers throughout the country.

The largest supermarkets in Côte d'Ivoire (PROSUMA and CDCI group) have their own dedicated supplier of imported seafood. Smaller supermarkets, hotels, and restaurants rely on wholesalers for their products.

Besides the conventional imported seafood market, seafood products that are caught within Côte d'Ivoire's borders are auctioned to wholesalers, who then resell the fish to up to fifty semi-wholesalers. The seafood is then either sold fresh or processed (smoked) for sub-regional sale.

Attachments:

No Attachments.

End of Report