

**Voluntary Report** – Voluntary - Public Distribution

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**Report Name:** Ghana Seafood Report

**Country:** Ghana

**Post:** Accra

**Report Category:** Fishery Products

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**Report Highlights:**

Ghana has one of the highest rates of dependence on fish for nutrition in Africa, with fish providing 60 percent of animal protein intake and estimated per capita fish consumption at 25 kg. Ghana's seafood market presents an excellent opportunity for U.S. suppliers. The value of U.S. seafood exports to Ghana reached \$7.9 million in 2017, reflecting rapid growth in the country's hospitality industry in general and the food services subsector in particular prior to the COVID-19 pandemic.

## General Information:

### Production

Capture fisheries, both marine and inland (rivers, lakes, and lagoons), along with aquaculture all play a role in Ghana's fisheries sector. Fish stocks are overexploited, marine fisheries are in terminal decline from intense fishing pressure by offshore trawlers, uncontrolled artisanal beach seining and harvesting of juveniles from lagoons. The Volta Lake, source of most of the harvest from inland fisheries, is also showing signs of overfishing. Industry experts note that at the current rate of decline in fish stocks due to overfishing and illegal, unregulated, and unreported (IUU) fishing activities, any future increase in domestic production will likely come from aquaculture. Total domestic fish production was less than 450,000 metric tons (MT) in 2018.

**Table 1: Ghana's Fishery Production, 2009-2018 (MT)**

Source	2012	2013	2014	2015	2016	2017	2018
Marine	333,697	314,868	289,147	320,221	328,541	342,427	294,240
Inland	95,000	86,741	85,383	86,268	84,345	76,753	73,628
Aquaculture	27,451	32,512	38,547	44,515	52,470	60,000	76,620
<b>Total</b>	<b>456,148</b>	<b>434,121</b>	<b>413,077</b>	<b>451,004</b>	<b>465,356</b>	<b>479,180</b>	<b>444,488</b>

Source: Fisheries Commission, Ministries of Fisheries and Aquaculture Development (MoFAD)

### Consumption

Fish is the preferred source of animal protein in Ghana and is a central part of Ghanaian cuisine, providing approximately 60 percent of the animal protein consumed in the Ghanaian diet. The annual per-capita fish consumption of Ghana was estimated to be 25 kg in 2018 and compared favorably with the African average of 10 kg. Industry analysts have attributed the decline from the 40 kg per capita consumption recorded in the 1970s to diminishing fish harvests and insufficient supply of affordable fish. This unfilled demand represents an excellent opportunity for suppliers of affordable seafood products. Ghana's estimated fish requirement for 2012 was 968,000 MT. This was partially met by domestic fish harvests of 456,148 MT from marine, inland fisheries, and aquaculture. In addition, imports of 243,100 MT were made but a large deficit in supply remained. Population and economic growth will continue to drive consumption upwards, and domestic aquaculture and frozen imports are how this demand will be met, as production from capture fisheries remains damaged by IUU fishing activities.

Premium fish species in Ghana are sea bream, red snapper, croaker and cassava fish. Hotels and restaurants are the primary consumer of these species and have become increasingly unaffordable for most households. Various mackerel species and sardines are more accessible to the average Ghanaian. Growing demand for imported seafood, particularly within the hotel and restaurant sectors, provides excellent market opportunities for U.S. seafood.

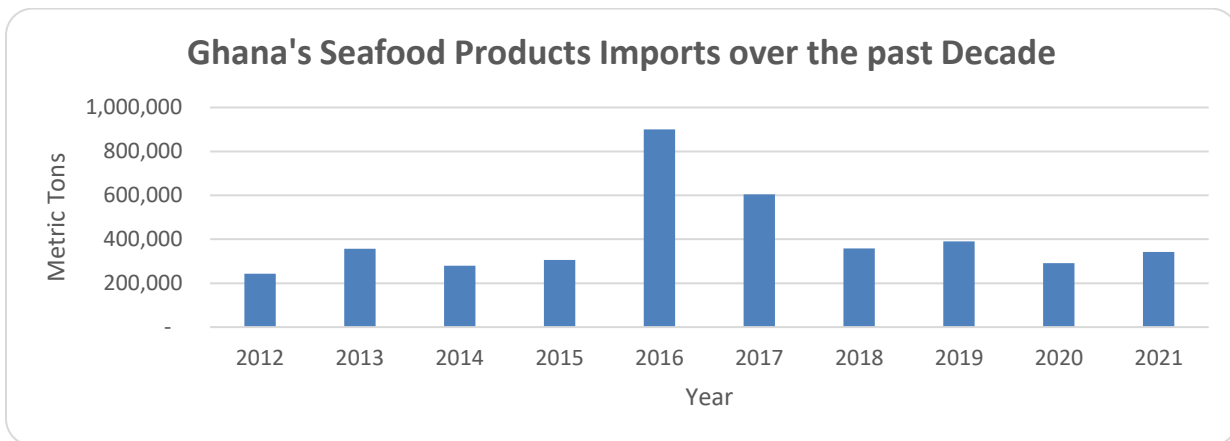
### Distribution

Imported frozen seafood is shipped in 10 kg, 20 kg, 25 kg or 30 kg packages depending on the buyers' request. The main fish species imported into Ghana are mackerel, horse mackerel, and

sardines/sardinella. The import of frozen hake has been trending upwards recently. Other species coming in on a lesser scale include croaker, sea bream, and red snapper. Frozen seafood is widely distributed across the entire country through a network of privately-owned cold stores. Owners of cold stores in the main ports of Tema and Takoradi buy, freeze, and store about 90 percent of the marine fish landed in Ghana (apart from tuna) in their facilities. The cold storage method helps to reduce the high post-harvest losses that occur during the major fishing season from July to September each year. The remaining 10 percent of supplies sell as raw fresh fish on the open market. Fish smoking is the dominant preservation method in Ghana. Traditionally, about 60 percent of processed fish consumed from the open market is smoked, 10 percent is sundried or salted, and the rest is fried, grilled or steamed. Hotels and restaurants buy the majority of tilapia, fresh or chilled, from aquaculture farms and inland reservoirs.

**Trade**

Ghana imported about 343,000 MT of seafood products in 2021. The common fish species imported into Ghana include mackerel, sardines, and whiting/hake.



Source: Trade Data Monitor LLC, 2022

In 2021, Ghana imported nearly \$290 million in seafood and fish products, a marginal increase of less than one percent over the preceding year’s value (\$288 million) but clearly a sign of continuous recovery from the dip in imports recorded in 2019 (\$185 million). With imposed lockdowns, travel restrictions, and loss of tourism during the COVID-19 pandemic, the hospitality industry was hit hard and this impacted seafood trade in a significant way. Trade Data from the U.S. Census Bureau indicates that U.S. seafood exports to Ghana reached an all-time high of \$7.9 million in 2017 and remained above \$7 million prior to the COVID-19 pandemic, after which a sharp decline was observed, with recorded sales of \$1.3 million in 2020. This value more than doubled in 2021 (\$2.9 million), signifying a recovery. Growth in import demand is expected to continue as the economy revives to the pre-pandemic growth pattern, as the population increases, and local fish production stagnates.

**Policy**

Ghana’s seafood imports require a permit from the Government of Ghana (GOG). In 2014, Ghana prohibited imports of tilapia in all forms as a means of protecting local producers, with more recent import bans citing the threat of Tilapia Lake Virus (TiLV). In a move to encourage domestic fish farming in the face of pervasive IUU fishing activities, the GOG reiterated in 2022 that this ban is still in

force. Tariffs are applied to all fishery products (including fin fish and invertebrates). Import Duty ranges from five to 20 percent of the cost, insurance, freight (CIF) value depending on the species and product type. There are additional charges, including Value Added Tax (VAT) - 12.5 percent charged on CIF value; a National Health Insurance Levy (NHIL) - 2.5 percent, ECOWAS levy - 0.5 percent; Export Development and Investment Fund Levy (EDIF) - 0.5 percent; Inspection fee - 0.1 percent; and ICUMS - 0.75% of FOB value. Please visit [Customs Tariffs and Levies – GRA](#) for detailed information on tariffs. The [FAIRS Annual Report](#) provides more information on market access.

### **Market Structure**

The major players for distributing imported seafood products in Ghana are Importers/Distributors/Agents (Sole representatives), Wholesalers, Sub-wholesalers/Super retailers, and Retailers.

There are more than 30 active seafood importers in Ghana, occupying the upper part of the product distribution chain with diverse operational capacities. Most of these businesses have large cold storage facilities (cold storage warehouses) capable of holding several twenty-foot equivalent unit (TEU) containers. Also, some have multilocational storage depots across the country and big refrigerated trucks that aid distribution of products to wholesalers. The products are mainly sold to wholesalers in TEU containers. The top-10 in this category include Labianca Company Limited (boasting the largest solar powered cold storage facility in West Africa and currently employing over 300 employees), Movelle Company Limited (with over 200 staff), Francopat Company Limited, Izako Ghana Limited, Cocas Impex Ghana Limited, Carmensita Ghana Limited, Perez Frozen Foods, Dolphin Frozen Foods Limited, We 2 Seafoods Company Limited, and LlamiGh Ghana Limited. Some of these importing companies vertically integrate by directly distributing the products to retailers.

In the midsection of the product distribution chain are the wholesalers and sub-wholesalers/super retailers, with varying cold storage capacities (2-10 TEU containers). Most of these have their own refrigerated trucks and refrigerated vans to aid the supply of products, mainly to the retailers. They can distribute an average of six TEU containers of product per month. There are about 80 throughout the country. Wholesalers source the imported products directly from the importers/distributors/sole representatives and supply retailers but there is the practice of supplying products to fellow wholesalers. When this happens, the recipient of the supply is referred to as a sub-wholesaler. Products are usually supplied in 10 kg cardboard boxes or cartons.

Occupying the lower part of the product distribution chain are the hundreds of retailers with cold storage capacity across the country. These include supermarkets with specially designed display freezers and convenience shops with deep freezers. Usually, these handle less than one TEU container of products at a time, restocking as and when necessary. They sell directly to consumers in cartons or with the help of a weighing scale. In some cases, some retailers may have operational capacities (cold storage facilities and mini refrigerated vans) like that of wholesalers and are referred to as super retailers simply because they are not supplied directly by the importers.

### **Market Entry Strategy**

The first point of contact for entry into the Ghanaian market is typically the Importer/Distributor. An exporting firm could also appoint an agent or sign agreement to make a local business entity the Sole representative. It is worth noting that almost all of the major importers own registered retail outlets, and

as such, exist and operate as distribution companies. U.S. exporters are encouraged to take one or more of these steps to ensure easy access to the Ghanaian market:

- Contact the USDA/FAS office located in the U.S. Embassy in Accra, Ghana for assistance in selecting one or more credible profiled firms. Lists can be provided upon request.
- Directly contact a credible importer/distributor or the local agent who would usually register the products with the Foods and Drugs Authority (FDA).
- Identify and sell through consolidators based in the United States who are already serving the West African region. Such consolidators usually have a good understanding of local market practices.
- Exhibit at USDA-endorsed Trade Shows like Gulfood and be prepared to offer flexible shipping volumes with well displayed readable manufacture and expiration dates.

## **POST CONTACT INFORMATION**

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**End of Report**

### **Attachments:**

No Attachments.