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# FAO REGIONAL CONFERENCE FOR AFRICA

## Thirty-third Session

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### **Blue Transformation in Africa: The potential of aquatic foods**

#### **Executive Summary**

Africa is endowed with abundant marine and inland aquatic resources, with the potential to help fight hunger and malnutrition, if managed sustainably. Aquatic food systems (marine and inland capture fisheries and aquaculture) already provide food and have contributed to improving the nutrition of millions of Africans, including those in food-deficient and low-income countries. However, the per capita consumption of aquatic foods in the continent is half the global average and, while aquaculture is being promoted as a growing food production system, the continent produces only 2.5 percent of the global aquaculture production of aquatic animals. Furthermore, production projections<sup>1</sup> suggest that, by 2032, Africa may be the only continent experiencing a decline in per capita consumption of aquatic foods, primarily because production growth may not compensate for population growth. The anticipated doubling of Africa's population from 1.4 billion to 2.5 billion by 2050 presents both challenges and opportunities, given the diverse fish species in regional waters intertwining with the cultural and dietary traditions of many African communities. The potential for the region's abundant aquatic resources must be harnessed for improved food security and nutritional outcomes, but also to boost intra-African and international trade. Small-scale fisheries, a cornerstone of the sector, contribute a significant proportion of the total catch, providing livelihoods, ensuring food security and supporting the economy at both local and national levels.

To maximize the benefits of aquatic food systems for livelihoods, food security and nutrition in Africa, prioritizing sustainable and resilient aquatic food systems is necessary within the framework of the 2030 Agenda for Sustainable Development. To achieve this, FAO proposes a Blue Transformation roadmap, an objective-driven vision to maximize the contribution of aquatic food systems to food security, nutrition and affordable healthy diets. It is based on sustainable aquaculture expansion and intensification, effective fisheries management and the upgrade of aquatic value chains, ensuring the social, economic and environmental viability of aquatic food systems, while securing nutritional outcomes.

<sup>1</sup> <https://www.fao.org/documents/card/en/c/cc0461en>

Documents can be consulted at [www.fao.org](http://www.fao.org)

*Queries on the content of this document may be addressed to:*

ARC Secretariat

ARC-Secretariat@fao.org

## I. Background

1. Aquatic foods provide at least 20 percent of the average per capita intake of animal protein for 3.3 billion people and provide a unique source of omega-3 fatty acids and essential micronutrients that are critical to people's cognitive and physical development. In 2020, around 600 million people had livelihoods dependent on aquatic food systems, with 58 million people working in primary production. The first sale value of aquatic production reached USD 406 billion, with world exports of aquatic products hitting a record high of USD 176 billion in 2021. Aquatic products represent one of the most traded global food commodities.

2. Aquatic food production systems have lower carbon emissions, water consumption and environmental footprint compared to most other land-based animal production systems. They also provide intangible benefits to stakeholders, including environmental stewardship, cultural identity and community cohesion. These benefits reflect the potential contribution of aquatic food systems to reach the Sustainable Development Goals (SDGs).

3. In 2021 aquatic animal production in Africa amounted to 12.7 million tonnes (7 per cent of global production), resulting in an apparent per capita consumption of 10 kg per year, less than half of the global average of 20.5 kg/person. The dependency of many coastal communities on aquatic foods is demonstrated by the fact that, in 2021, Africa accounted for 10 percent of the global total of fishers and fish farmers, including 13 percent of the world's 37.9 million fishers.

4. Unfortunately, global projections up to 2032 indicate that Africa is the only region where apparent per capita consumption of aquatic foods is projected to decrease to 9.6 kg/person per year. This decrease is even greater (8.3 kg/person/year)<sup>2</sup> in sub-Saharan Africa, as production growth may not match or keep pace with population growth. Reversing this trend requires a concerted effort to share knowledge and apply best practices that consider environmental impacts as well as the social and economic viability of every element of Africa's aquatic food systems.

5. To guide these efforts FAO developed a Blue Transformation Roadmap<sup>3</sup> to maximize aquatic food systems' potential as drivers of employment, economic growth, social development and economic recovery, particularly in the face of conflict and climate change. This vision is anchored in three quantifiable objectives:

- a. Sustainable intensification and expansion of sustainable aquaculture satisfies rising global demand for aquatic foods.
- b. Effective management of all fisheries delivers healthy stocks and secures equitable livelihoods.
- c. Upgraded value chains ensure the social, economic and environmental viability of aquatic food systems.

6. FAO estimates that the global transformation of aquatic food systems could increase production from 178 million tonnes to almost 250 million tonnes per year (high-road scenario); with per capita consumption increasing to 25.5 kg/year, enhancing global food security and nutritional outcomes. FAO Members have emphasized the key role of Blue Transformation as FAO's vision for attaining sustainable aquatic food systems.<sup>4</sup>

7. Blue Transformation provides opportunities for innovation and investment. Countries can enhance aquatic food systems' resiliency and productivity by embracing technological advancements and sustainable practices. Key investments in sustainable aquaculture, fisheries management and upgraded value chains are pivotal for unlocking economic growth and ensuring food security. Moreover, fostering a conducive environment for innovation and attracting investments can significantly accelerate Blue Transformation.

8. Due to a growing population and an increasing awareness of their health benefits, demand for aquatic foods continues to grow, particularly in the Africa region. Recognizing the limited expected

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<sup>2</sup> See OECD/FAO. 2023. OECD-FAO Agricultural Outlook 2023-2032, OECD Publishing, Paris, <https://doi.org/10.1787/08801ab7-en>

<sup>3</sup> See <https://www.fao.org/documents/card/en/c/cc6646EN>

<sup>4</sup> See the Report of the 172nd Session of the FAO Council. <https://www.fao.org/3/nm116en/nm116en.pdf>

production increase from even the best managed fisheries, sustainable growth in aquaculture is necessary to bridge the supply gap for aquatic foods, especially in food-deficit regions such as Africa. The expected growth not only addresses increased demand, but also generates new or secures existing sources of income and employment.

9. Aquaculture remains the fastest growing food-producing sector in the world. Global aquaculture production has grown to 126.0 million tonnes (91 million tonnes of animals and 35 million tonnes of plants) in 2021, worth USD 296 billion. However, in 2021 Africa's production only reached 2.3 million tonnes of aquatic animals, about 2.5 percent of global production. In the context of Blue Transformation, FAO proposes three main global outcomes for sustainably expanding and intensifying aquaculture:

- a. sustainable aquaculture production grows by at least 35 percent by 2030;
- b. growth in aquaculture employment and skilled labour improve incomes and livelihoods; and
- c. the achievement of full and productive employment and decent work in the aquaculture sector for all women and men by 2030.

10. The continent is however responding to the challenge, but much is to be done. Despite having a low baseline, the sector has grown at 8.3 percent annually between 2000 and 2021.<sup>5</sup> The African Union exhibited strong political will at the continental level by endorsing the African Common Fisheries Policy, in 2014, but there is limited commitment from governments to promote and effectively implement these policies. Aquaculture priorities are implemented within the African Union's Continental Aquaculture Development Action Plan (2016-2025). To ensure coherence of the continental framework with the global aquaculture instruments, FAO provided technical support to the African Union and the African Union Development Agency (AUDA-NEPAD) during the formulation of the Policy Framework and Reform Strategy for Fisheries and Aquaculture in Africa (PFRS) through the NEPAD-FAO Fish Programme (NFFP). The PFRS has seven policy priorities, including "Sustainable Aquaculture Development", aimed to jump-start market-led sustainable aquaculture through strategic interventions, and robust implementation plans.

11. Ensuring effective management of fisheries and aquaculture is a fundamental objective of FAO's Blue Transformation, underpinning national commitments to the SDGs and securing the livelihoods of millions of people across Africa. FAO's Blue Transformation vision outlines three key global outcomes for sustainable fisheries:

- a. implementing effective management of all the world's fisheries;
- b. phasing out all illegal, unreported, and unregulated fishing activities; and
- c. achieving full and productive employment and decent work in the fisheries sector for all.

12. To achieve this, FAO, governments and other partners must establish effective governance, policies and institutions to deliver sustainable management, enable equitable access to resources and services for fishers and fish workers (both men and women), apply effective fisheries management systems in all fisheries, and achieve efficient, safe and profitable fishing fleets.

13. The effective implementation of sustainable and adaptive fishery management leads to healthy fish stocks, thus securing social, environmental and economic benefits from capture fisheries. Moreover, as the understanding of climate change and other hazards on aquatic ecosystems grow, there is need for explicit consideration of climate stressors and disaster risks in adaptive fisheries management. This involves integrating climate change adaptation and disaster risk reduction, establishing stronger connections with natural resources management and aligning actions with broader development initiatives.

14. In the Africa region, specific actions have been undertaken to advance sustainable fishing practices, bolster regulatory frameworks and foster multi-stakeholder engagement to ensure the long-term viability of aquatic resources. FAO collaborates with regional fisheries bodies and partners,

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<sup>5</sup> FAO. 2022. *State of the World Fisheries and Aquaculture 2022 – Towards Blue Transformation*. Rome, FAO. <https://www.fao.org/documents/card/en/c/cc0461en>

and actively participates in projects such as the EAF-NANSEN Programme<sup>6</sup> to enhance fisheries management.

15. Illegal, Unregulated and Unreported (IUU) fishing remains a challenge in Africa. FAO's frameworks, like the Agreement on Port State Measures, Catch Documentation Schemes, the Voluntary Guidelines for Transshipment, and the Voluntary Guidelines for Flag State Performance, are instrumental in combating IUU fishing and promoting sustainable fisheries management globally and in the Africa region. FAO will continue integrating these frameworks, contributing to the region's food security and economic development.

16. The commemoration of the International Year of Artisanal Fisheries and Aquaculture (IYafa) 2022 provided a unique platform to address the needs of small-scale fisheries and aquaculture in Africa. National and regional events, including the "Illuminating Hidden Harvest Study",<sup>7</sup> highlighted challenges and solutions in artisanal fisheries and aquaculture in Africa.

17. IYafa 2022 in Africa<sup>8</sup> emphasized the crucial role of fishers, fish-farmers, and fish-workers as custodians of aquatic resources. The Year served as a basis for future collaborations, highlighting FAO's projects in Africa, and offering recommendations to strengthen the role of small-scale fisheries and aquaculture in the region.

18. Aquatic food value chains, including the full range of activities from production to delivery to consumers, need upgrading for efficiency, inclusivity, sustainability and resilience. Aquatic food value chains enhance the value for aquatic foods, generating more wealth and sustenance from aquatic food systems, supporting resilient livelihoods, and contributing to poverty reduction. FAO's Blue Transformation establishes four key global outcomes for aquatic food value chains:

- a. significant increases in global per capita fish consumption by 2030, especially across the Global South;
- b. reduction of fish loss and waste by half by 2030;
- c. current and potential exporters in developing countries are able to fully comply with import market requirements of major import countries; and
- d. all forms of discrimination and abuse against women along the value chain are phased out.

19. Achieving the above outcomes requires improvements in understanding vulnerabilities and risks, upgrading post-harvest areas, fostering transparency and inclusiveness, improving access to international markets and integrating aquatic foods in nutrition and food security policies.

20. In Africa, harmful fishing subsidies are a driver for the depletion of fish stocks. The World Trade Organization's Agreement on Fisheries Subsidies, adopted in 2022, seeks to curtail the impact of harmful subsidies on the health of stocks by setting new binding, multilateral rules. FAO will support countries in the implementation of this agreement.

21. The necessity for Blue Transformation stems from the critical need to sustainably manage aquatic resources, improve food security, and bolster the socioeconomic fabric. Fostering innovation and employing adaptive strategies and establishing multi-stakeholder collaborations are crucial in different country contexts across Africa. Consequently, tailored priority actions and policy frameworks aligned with these needs are paramount to actualizing the transformative potential of aquatic food systems and contributing towards the broader sustainable development agenda in the region.

22. Collaboration with regional bodies, including regional fishery bodies,<sup>9</sup> is crucial for sustainable aquatic food systems. Their expertise of local conditions and their involvement in technical collaboration and knowledge exchange and transfer are invaluable. Aquatic foods must also be integrated into FAO's

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<sup>6</sup> EAF-Nansen Programme is committed to improving fisheries management in line with the ecosystem approach to fisheries (EAF)

<sup>7</sup> See Illuminating Hidden Harvest Report here: <https://www.fao.org/documents/card/en/c/cc4576en>

<sup>8</sup> See *The International Year of Fisheries and Aquaculture (IYafa) 2022 in Africa: Final report* here: <https://www.fao.org/3/cc4939en/cc4939en.pdf>

<sup>9</sup> Regional fisheries bodies in Africa can be found here <https://www.fao.org/fishery/en/organization/search>.

regional initiatives addressing hunger, enhancing productivity and increasing the resilience of livelihoods to threats and crises.

23. Establishing robust linkages between regional and global initiatives, such as Blue Transformation, ensures the alignment of regional priorities with global goals, guiding on-the-ground initiatives with global best practices and standards.

## **II. Objectives of the session**

24. The Ministerial Roundtable will serve as a platform for Members and key stakeholders to deliberate on concrete examples of measures or practices adopted by the Africa region to foster investment and innovation in aquatic food systems. It aims to aggregate insights to boost investments and innovative approaches to maximize the contribution of aquatic food systems to economic growth, employment generation, sustainable development, food security and improved nutrition. This highlights the essential connection between collaborative dialogue, innovative practices and strategic investments in unlocking the transformative potential of Blue Transformation in Africa.

## **III. Expected Outcomes**

25. A shared understanding of the primary challenges and opportunities associated with strengthening aquatic food systems within the Blue Transformation framework in the region.

26. A shared understanding of exemplary practices from Members (e.g. policy environment, capabilities, institutions, etc.) to foster and increase investment and trade for aquatic food systems.

27. Recommendations and advice to FAO to intensify its support to Members and Regional Economic Communities in endorsing Blue Transformation to enhance aquatic food systems.

## **IV. Target audience / Participants**

28. The target audience will encompass Ministers, the African Union, Regional Economic Communities in Africa, international organizations, national and international experts, the private sector, non-governmental organizations/civil society organizations and other invited participants. This diverse assembly will converge to deliberate and advocate for the FAO Blue Transformation agenda, focusing on strengthening sustainable aquatic food systems within the African continent.

## V. Agenda

5 minutes	Moderator welcomes participants and introduces video	Mr Manuel Barange, Assistant Director-General and Director of the Fisheries and Aquaculture Division, FAO (Moderator)
10 minutes	Keynote address: why Blue Transformation in Africa? What is FAO's Blue Transformation vision for a sector under transformation? What can Blue Transformation achieve in a dynamic sector?	Dr Manuel Barange, Assistant Director--General and Director of the Fisheries and Aquaculture Division, FAO (Moderator)
30 minutes	Panel discussion (proposal)	<ul style="list-style-type: none"> <li>• Ministers</li> <li>• Representative of the <b>African Union Commission</b></li> </ul>
40 minutes	<p>Plenary discussion and sharing on policy options and solutions.</p> <ul style="list-style-type: none"> <li>• What innovations can you share on enhancing the contribution of aquatic foods to food security and nutrition and economic growth?</li> <li>• What recommendations do you have going forward?</li> </ul>	Delegates and participants -
10 minutes	Wrap-up and concluding remarks	Subregional Coordinator, FAO