

Overview of Marine Fisheries Sector

Pre and Post-tsunami

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Pre-Tsunami Situation & Socio-Economic Importance

- Fishing Population – around 611,900
- Active Fishermen – 151,800
- 2-3% contribution to GDP
- 60% contribution to protein intake
- Volume of exports has increased from 2393t in 1983 to 13 681 t in 2004
- Export earnings reached US \$ 100 million in 1984



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Trends in Fishing Fleet Development

- Fishing fleet increased from 28 000 in 1984 to 31 660 in 2004



- Major increases in:
 - 1) Coastal FRP boats – From 6880 in 1984 to 11 550 in 2004
 - 2) Offshore multi-day boats – From 72 in 1984 to 1580 in 2004

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Trends in Marine Fish Production

- Total marine fish production has increased from 142 670 t in 1985 to 253 190t in 2004 - An increase of over 110 000 t during the 20 year period
- Coastal fish production has increased only marginally – from 140 270 in 1985 to 154 470 in 2004 – An increase of only 14 200t
- Offshore fish production has increased significantly – From 2 400t in 1985 to 98 720t in 2004

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Status & Issues in Marine fisheries

Coastal fishery

- over exploitation
- use of illegal/harmful fishing methods
- damage/destruction of critical habitats
- user conflicts

Offshore fishery

- Heavy reliance on gillnet fishing
- Imbalance in harvesting of resources
- Heavy post-harvest wastage and losses
- Limited development in boat technology
- By-catch issues
 - Inadequate Monitoring, Controlling & Surveillance
 - Inadequate data
 - lack of management

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Fisheries one of the worst affected sectors

Humanitarian damages to fishing communities

- 4,870 fisher deaths
- 103,000 fisher people displaced
- 16,500 fisher houses destroyed and 13,300 houses damaged

Damage to the industry

- 24,000 boats (76% of the fishing fleet) affected
 - ie. 53% destroyed and 23% damaged
- 10 of the 12 fishery harbours, 37 fishing anchorages and 200 fish landing centers destroyed or damaged
- fish markets, fish marketing and handling facilities including ice plants, cold stores, and fishery co-operative buildings and vehicles
- Institutional damages – DFAR / NARA / CCD / NIFNE

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Impact on the sector

Production and Income

- Estimated drop of 41% in fish production in 2005
- Loss of livelihoods and incomes (54,000 in direct fishing)
- Drop in per capita fish consumption from 17.4 kg to 11.7 kg
- Reduction in Exports of marine products

Huge Rehabilitation cost – US \$ 123.2 million

(Craft repair/ replacement; Fishing gear; Harbours & anchorages; Cold storages and ice plants and Institutions)

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Table 1: Damage to Fishing Fleet

- 54% of the fleet destroyed and 23% damaged

Boat Type	Boats Destroyed	Boats Damaged	Total Des. / Dam.
Multi-day boats	187	676	863
One day boats	276	783	1059
FRP Boats	4485	3211	7691
Traditional crafts	11165	2435	13600
Beach seine crafts	818	161	979
Total	16921	7266	24192

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Status of Boat & Engine Repairs

- Repair of all damaged boats completed
- Repair of 2900 engines complete / 200 more to be repaired

Boat Type	No. Damaged	Repaired by CEYNOR	Repaired by NGOs	Total Repaired
Multi-day boats	676	657	123	780
One day boats	783	668	197	865
FRP boats	3211	1412	2695	4107
Traditional crafts	2435	1674	1915	3589
Beach seine crafts	161	40	94	134
Total	7266	4451	5024	9475

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Provision of new Boats

- Likely oversupply of over 2200 FRP boats
- Traditional crafts – Likely oversupply of over 500 crafts
- Shortfall in supply of beach seine craft

Boat Type	Destroyed	Replaced	Balance Pledges
Multi-day boats	187	0	175
One day boats	276	20	393
FRP boats	4480	4218	2557
Traditional crafts	11158	8627	3034
Beach seine crafts	818	203	355
Total	16919	12068	6514

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Fishing fleet recovery status

- 76% affected by Tsunami
- 93% affected fleet rehabilitated by end of November
- 60% of the fleet operating by June 2005

Boat type	2004 fleet	Dam. / Des.	Rep. / Repl.	2005 June
Multi-day boats	1 581	863	780	1 283
One Day boats	1 493	1 059	885	1 149
FRP boats	11 559	7 691	8 325	7 153
Traditional crafts	15 934	13 593	12 216	8 978
Beach seine crafts	1 096	979	337	262
Total	31 663	24 185	22 543	18 825

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Fish production recovery

Gradual recovery from January to August

Jan. – August 2005 production is 38-40% of the production during similar period in 2003 & 2004 (in tonnes)

Period	2003	2004	2005	%
Jan. - March	68 790	68 240	10 900	16%
April – June	49 550	56 440	27 726	49%
July – August	39 550	39 110	24 100	62%
Jan. – August	157 890	163 790	62 726	38-40%

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Issues related to Damage assessment & Rehabilitations of the Fishing Fleet

- No. of Traditional crafts and FRP boats damaged /destroyed is higher than 2003/2004 fishing fleet in some districts
- More boats repaired than damaged
- Problems in beneficiary selection - Some genuine fishermen still without boats – even in districts with an oversupply
- Repairs not satisfactory / demand for new boats
- New boats not seaworthy / demand for replacement
- Inadequate supply of fishing gear

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Concern regarding Issue of over supply of boats

The need for a Precautionary approach

- Resource issues
 - Impact of tsunami on resources unknown
 - Impact from “Sethu Samudram” project
 - Increased efficiency of rehabilitated fleet



- Continuation of prevalent fishing practices
 - Over exploitation
 - Use of destructive fishing gear
 - Ecosystem damage
 - Inadequate management



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Building back Better

- Improved designs for multi-day boats
 - Minimum safety standards
 - Better operational efficiency
 - Greater safety at sea
- Improved on board fish handling & preservation
 - Minimize economic waste
 - Increased landings of quality fish
 - Opportunities for export
- Promote sustainable Fisheries management:
 - Engage/empower resource users/communities
 - Awareness creation
 - Institutional capacity building (fisheries data/registration/licensing/assessments)



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Building Back Better - Opportunities & Challenges

A decisive role for fishing communities and national fisheries agencies

- strengthening community and civil society organizations
- upgrading of agency capacities to provide services including research and training in support of sustainable management of fisheries and coastal areas and livelihoods diversification
- Attitudinal changes among all actors

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