

## Africa/ Tanzania

### What next?

*Women are constantly struggling to retain a role in the export-oriented fisheries of Lake Victoria*

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Fisheries globalization is transforming the structure of markets and, with this, gender relationships. Social, political and economic processes now operate locally *and* globally. Changes in Lake Victoria's fisheries and fishing communities, from primary reliance on local markets, equipment and sources of capital, to reliance on export markets, external equipment suppliers and external sources of funding have affected, and have been mediated by, gender relations.

Lake Victoria, the second largest fresh water lake in the world, is shared between three countries—Tanzania, Uganda and Kenya. The lake accounts for an estimated 60 per cent of Tanzanian inland fish production. Fish and fisheries products from Lake Victoria are a significant source of food for Tanzania. They also contribute to the country's foreign exchange coffers. These fisheries provide income and employment to over 32,000 full-time fishers while an estimated 500,000 people are employed, formally and informally, in fisheries-related activities.

In the Kagera Region in northwest of Tanzania, historically fish was primarily consumed fresh, except for some sales to distant markets of sun-dried or smoked fish. The sexual division of labour varied from place to place, depending on the ethnic origin of the group. Women in the eastern portion of Lake Victoria were more likely to participate in fish trading, than those in the central and western portions. Local culture generally prohibited women from being away from their homes, limiting their ability to trade fish. The dominant means of transport were travel on foot and by bicycle tending to limit fish traders to local markets.

Since the 1980s, the Nile perch fishery has attracted tremendous investment. It has become one of the most important economic activities in the area. Industrial fish processing factories and fishing camps generate revenue for communities in the regions surrounding Lake Victoria. Recent research on the Tanzanian sector of Lake Victoria indicates some of the problems that small-scale fish traders and processors have faced in attempting to benefit from the export-oriented Nile perch fishery that developed in the 1980s.

Irrespective of gender, the two dominant problems they confront are those of transport and the availability of adequate funds. However, both quantitative and qualitative data indicate that most fish suppliers in the Nile perch fishing industry are men. In the year 2000, male suppliers made up 84 per cent of those providing raw material to the processing sector, compared to 16 per cent women suppliers.

In addition, men largely control the new technologies associated with the Nile perch fishery. Fish factory owners attribute the dominance of male fish suppliers over females to men having access to more of the capital needed to buy collector boats, provide seed money and hire labourers. Other factors they point to include the fact that men are better able to travel frequently, have better access to business collateral, and are reported to be more aggressive than women in persuading owners to grant them loans and in asking for advances for fish procurement payments.

There are important differences between men and women in terms of the way they engage in the Tanzanian Lake Victoria fish trade. Women, more than men, combine fish trade with other types of work. A majority of women (57 per cent) participate only in fish trading, but 43 per cent combine fish trading with other business activities. In contrast, on the Tanzanian side, 74 per cent of men participate only in fish trading while 24 per cent combine fish trading and other business. The high percentage of women who combine fish trading with other business as compared to their male counterparts may indicate women's greater vulnerability and greater income insecurity within fisheries-related activities.

In contrast to the fish supply sector, women made up a majority of those purchasing and processing the waste from the fish plants in the first three years of factory development in Tanzania. Nile perch fish frames (skeletons), locally known as *punk*, were considered waste and factories had to pay to dispose of them. To eliminate this cost, factories began selling them to local processors. Women were the first group to look for Nile perch by-products in factory doorways. This business started in 1993, one year after fish processing firms invested in Tanzania. A study carried out in *punk* processing camps indicated that 70 per cent of *punk* dealers were women.

In six operational Nile perch processing industries on the Tanzanian side of the lake, about 67 per cent of those buying and utilizing by-products from the fish processing industries were women. The women collected fish frames in troughs, baskets, hand drawn carts, and wheelbarrows and took them to the processing camps.

By 1997, 4 to 7 tons of fresh fish frames cost Tshs. 60,000-90,000.0 (US \$75-112.50) wholesale. After processing (smoking and sun drying), the processed *punk* could be sold for Tshs. 100,000-120,000.00 (US \$125-150). Single and married women used the revenue from this activity to build houses, feed their families, buy clothing, pay school fees and for medical care.

Over time, however, the Nile perch processing factories improved their filleting process so that no meat content was left on the frames. This meant the *punk* community could not get enough fish frames for human consumption. In response, some women started to grind *punkies* in locally made mortars and feed them to their chickens.

Additional, more recent changes in this sector have further eroded the capacity of these women to generate livelihoods from fish frames. In 1996/97 processed *punk* for animal feed was commercialized resulting in new investments in local fishmeal factories. The major markets for processed fish frames were Shinyanga, Tabora, Dodoma, Morogoro, Singida, Mwanza, Mara and in some parts of Kagera region. The main markets for fishmeal products were Dar Es Salaam, Arusha, Mwanza, Morogoro, Dodoma and neighbouring countries such as Zambia and Kenya.

In 1998, higher standards for hygiene in fish processing required by European Union export requirements encouraged Nile perch factory owners to seek wholesale buyers for their by-products. This helped ensure the factory doorways would be quickly cleared and reduced the risk of both human and by-product waste congestion. However, when the factory owners started selling their fish frames to wholesalers, many women were forced out of the trade. Most could not compete with the men buying these products for animal feed as well as human consumption. The multiple demand led to high procurement costs which women could not manage.

The strong export orientation of the Nile perch industry and limited opportunities for women to derive employment and incomes from the sector have encouraged some to focus on purchasing juvenile Nile perch harvested in illegal gear. The minimum size for legally harvested Nile perch is half a kilogram. Purchasing this fish requires access to sufficient capital to compete with the factory agents, the main buyers of this fish type. These factory agents are not allowed to purchase juvenile Nile perch of less than half a kilogram.

Because legally harvested fish has become more expensive for the small traders who serve the local markets, because small fish is cheaper, and because falling incomes among local consumers limit the price they can pay for fish, the women traders have resorted to buying fish harvested in illegal, small-mesh gear to sell to industrial fish collectors.

However, marketing this fish provides a precarious source of income for small traders. Fish less than half a kilogram caught in beach seines and undersized gillnets may be sold to industrial agents because they can offer higher prices.

Some women fish traders have resorted to staying in the beach seine fishing camps at night so that they can get priority access to the available catch. Others have dropped out of the fish trade and moved to trading in other goods. If illegal gear is eliminated, the surviving women traders and processors could lose their access to fish.

Globalization has opened up new opportunities for some women but it has also undermined many women's economic independence and increased the challenges

they face in supporting themselves and their families. It has done this by contributing to environmental change, undermining their access to fish for processing and trading, enhancing competition and theft within fishing and trading, and ghettoising women in poorer paid occupations within industrial fish processing as contingent, vulnerable workers.

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