Every day in South Africa, more than three million people enjoy an affordable and tasty meal of canned fish, many thousands of others relish the convenience of a parcel of hake and chips or savour the delicate taste of locally caught rock lobster in a fine restaurant.

This is what the commercial fishing industry brings to South Africa’s table: food security and a variety of healthy seafood choices.

The South African fishing industry consists of 22 different sectors (or fisheries) that each utilise a specific type of boat and gear (machinery and methods) to harvest a wide range of fish species – from rock lobsters to shoaling fishes like sardines and anchovies and squid that is caught, frozen and shipped to Italy where it is regarded as the very finest type of “calamari”.

Estimates vary, but it is generally agreed that in excess of 27 000 South Africans are directly employed in the South African fishing industry and a further 100 000 work in associated industries that supply goods and services to the industry. And, although it is concentrated in the Western Cape, the fishing industry is a significant employer in the Eastern Cape. Indeed, its reach is as flexible and far-reaching as the tentacles of an octopus: there is canned fish on the shelves of every spaza shop in every rural village in South Africa, prime quality kingklip on the menus of some of the finest seafood restaurants in Johannesburg, Durban and Cape Town, and a package of fish fingers in the freezer of many homes.

The fishing industry is regulated by government and the individuals and companies engaged in commercial fishing are registered and licensed. They pay license fees, catch levies and taxes and government monitors and controls fishing activity via a suite of activities that have as their goal the sustainable use of fisheries resources for the benefit of current and future generations. Co-management – industry working in partnership with government towards the optimal utilisation of fisheries resources – is something the fishing industry does not take lightly. Industry representatives play a vital role on scientific and management committees, and the fishing industry works with government at international fora such as the regional fisheries management organisations that distribute and regulate global tuna resources. It was in the spirit of co-management that FishSA was established in 2011. Today the association represents 12 individual fisheries associations whose members annually harvest approximately 500 000 tons of fish per year.
FishSA interacts with government on behalf of its member associations to influence the policy and legislative environment, and to improve the commercial environment. The body provides a forum for constructive communication and works across a number of networks and institutions to promote the development of the commercial fishing sector, encourage the optimal utilisation of fish stocks and create employment.

**This brochure introduces the 12 member associations of FishSA. It describes each of the commercial fisheries they are engaged in and quantifies their individual socio-economic contributions.**

The latest available statistics are provided for the value of each fishery, the number of employees it supports and the investments made by its members. Unique challenges and opportunities are highlighted for each fishery. The brochure also presents the wide range of species that are harvested and marketed by the fishing industry and demonstrates how the various associations have developed markets for South African seafood products right across the globe.

The leadership of FishSA is acutely aware of the social and ecological context in which the fishing industry operates. Consequently, it works hard to encourage its members to support small, medium and micro-enterprises, adopt a zero-tolerance approach to safety at sea and practice responsible fishing. These are vitally important pillars for the development of the South African fishing industry which understands that the sea is its gold mine.

FishSA is proud to operate in an industry that harnesses engineering skill and human ingenuity to produce food, provide jobs and opportunities and contribute positively to South Africa’s export industries. The organisation is committed to safeguarding food security and generating benefits for the South African economy for generations to come.

*Loyiso Phantshwa*
Chairperson
From South
Export markets for South
Africa to the world

African seafood products

The main centres of commercial fishing in South Africa
SASMIA – South African Squid Management Industrial Association

Squid are caught by a method known as “jigging”. Jigs are coloured plastic lures with barbs that are fixed to a line and used by hand in a jerking motion. Jigging for squid generally takes place at night with bright spotlights that attract the fish to the boat.

Catches fluctuate significantly from year to year and typically vary between 6 000 and 11 000 tons.

**CHALLENGES**
- The inclusion of squid in the basket of species allocated to the small-scale fishery.
- Loss of fishing areas to marine protected areas.
- Loss of fishing areas to Algoa Bay port development and possible nuclear power plant.
- Potential impact of seismic surveys and other marine mining activities on very sensitive squid spawning grounds.
- Climate change and its impact on fish movements.

**OPPORTUNITIES**
- Improvements in catching techniques.
- Identification of new fishing grounds.

The fishery for squid operates in the Eastern Cape, between Plettenberg Bay and East London. The main centres of activity are Port Elizabeth and Port St Francis. There is some squid further west, but it is difficult to find and is only pursued when the fish in the Eastern Cape is scarce, or when large quantities are observed on the Agulhas Bank.
The small pelagic fishery utilises purse seine vessels to target anchovy, sardine and round herring, small fish that form large shoals in surface and near-surface waters over the continental shelf.

- Anchovy and round herring are processed into fishmeal and fish oil – constituents of animal feeds, most notably fish feeds.
- Sardine are canned or frozen for human consumption and pet food, or frozen for bait.

**Challenges**
- Highly volatile quotas.
- Non-viable allocations.
- Changing geographical distribution of the fish.
- Recapitalisation of aging assets.
- Shortage of fish meal processing capacity.

**Opportunities**
- Catch the anchovy TAC.
- Process round herring for human consumption.
- Process anchovy for human consumption.

In recent years, anchovy populations have been very high, but sardines have experienced very poor recruitment and the stock is currently at very low levels.

More information: https://sapfia.org.za

The small pelagic fishery operates on the west, south and southeast coasts of South Africa. Fishmeal plants are located at Laaiplek, St Helena Bay (3) and Gansbaai; canneries are at Laaiplek, St Helena Bay (3), Gansbaai and Mossel Bay; pack and freeze operations are at St Helena Bay, Cape Town, Hermanus, Gansbaai, Mossel Bay, Port St Francis and Port Elizabeth.
The south coast rock lobster fishery operates from the Great Kei River to Cape Hangklip in offshore waters of between 50 m and 300 m in depth. Vessel discharge and processing activities take place in Cape Town, Port Elizabeth, East London and occasionally Mossel Bay.

The cold water spiny rock lobster is the target of the south coast rock lobster fishery. The species is caught by means of traps deployed on longlines. Products include frozen rock lobster tails (80%), live rock lobsters (18%) and frozen whole raw rock lobsters (2%). Markets are in the United States (80%), Europe (19%) and South Africa (1%). Products are primarily sold to the food service market (hotel and restaurant trade), with a small amount sold to retail markets.

**CHALLENGES**
- Ensuring that fishing rights are renewed in 2021 in line with capital invested by current rights holders.
- Maintaining a sustainable resource, with improvements in catch rates.
- Maintaining brands in the market, yielding consistent selling prices and managing currency fluctuations.
- Keeping operating costs in check.
- Affordability of fleet renewal.
- Sourcing competent fishing crews.

**OPPORTUNITIES**
- Increasing catch rates; reducing fuel consumption.
- Increasing product value.
The west coast rock lobster fishery is concentrated in the Western and Northern Cape provinces. The fishing grounds are divided into areas. Nearshore fishers use hoop nets and small boats to catch rock lobsters up to one nautical mile from the coast in areas 1, 2, 3, 4, 5, 6, 8 and areas 11 to 14. Offshore fishing takes place in deeper water, in areas 3, 4, 7, 8 and 11.

Currently, 20% of the west coast rock lobster resource is harvested by hoop nets from small boats called “bakkies” in the nearshore region, and 80% of the resource is harvested by offshore trap vessels operating in water depths of greater than 100 m. The resource in the nearshore region is also harvested by recreational fishers and small-scale fishers.

Approximately 90% of the catch is exported live to markets in China and Japan. The balance is exported in whole frozen form, or as frozen lobster tails, to China, Japan and the United States.

Fifteen-year rights were allocated to the west coast rock lobster fishery in the 2017/2018 fishing season. The fishery is compromised by high levels of illegal, unregulated and unreported (IUU) fishing.

**CHALLENGES**
- Reduce IUU fishing and rebuild the resource.

**OPPORTUNITIES**
- The use of technology to establish a traceability scheme aimed at reducing IUU fishing.

<table>
<thead>
<tr>
<th>Memers</th>
<th>287 (nearshore fishery)</th>
<th>102 (offshore fishery)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Representivity</td>
<td>74% (nearshore fishery)</td>
<td>61% (offshore fishery)</td>
</tr>
<tr>
<td>Black Ownership</td>
<td>98% (nearshore fishery)</td>
<td>85% (offshore fishery)</td>
</tr>
<tr>
<td>Boats</td>
<td>258 vessels using hoopnets</td>
<td>52 offshore trap boats</td>
</tr>
<tr>
<td>Employees</td>
<td>2775 (mostly seasonal)</td>
<td></td>
</tr>
<tr>
<td>Annual Average Catch</td>
<td>670 tons (2018/2019 fishing season)</td>
<td></td>
</tr>
<tr>
<td>Catch Value</td>
<td>R68 million (nearshore)</td>
<td>R254 million (offshore)</td>
</tr>
<tr>
<td>Exports</td>
<td>95% export</td>
<td></td>
</tr>
</tbody>
</table>
The inshore trawl fishery catches hake and Agulhas sole on the south and east coasts of South Africa. Fishing is in waters shallower than 200m. Catch discharge and processing facilities are mainly located in the ports of Mossel Bay and Port Elizabeth.

The inshore trawl fishery is a dual quota, multispecies fishery focused on Cape hake and Agulhas sole. The annual catch of 12 000 tons typically consists of 9 000 tons of hake, 300 tons of Agulhas sole and approximately 2 700 tons of joint product species, including pangas, skates, horse mackerel, St Joseph sharks, kingklip, squid, gurnard, monk, kob and carpenter. (Hake landings amount to approximately 6% of the annual hake total allowable catch.)

The fishing fleet consists of 25 fresh fish trawlers, ranging from 13 m glass fibre sole catching vessels to 34 m steel vessels. The vessels produce a wide range of fresh and frozen seafood products, mainly for the local market.

Since 2016 and the contested allocation of rights to this fishery, membership of SECIFA has been disrupted. Currently, about 88% of rights holders are represented by the Association. A number of new entrants have not yet joined SECIFA because of legal uncertainty around their rights.

### CHALLENGES

- Uncertainty around the policy, process and allocation of fishing rights. The proliferation of rights holders, lack of consistency and unviable quota redistribution has strained the long-standing business model for the fishery.
- Skills and funding constraints on scientific research.
- Re-building a co-management philosophy and structure.

### OPPORTUNITIES

- Adding value to joint product species.

### MEMBERS

- 38 pending appeal decision

### REPRESENTIVITY

- Unknown, pending appeal decision

### BLACK OWNERSHIP

- 82% pre-FRAP 2016
- 87% post July 2017 appeal
- 89% post 2018 appeal

### BOATS

- 25 stern and side trawlers

### INVESTMENTS

- R500 million

### EMPLOYEES

- 1 500
  - 60% men / 40% women
  - 60% full-time / 40% part-time

### ANNUAL AVERAGE CATCH

- 12 000 tons

### CATCH VALUE

- R350 million

### EXPORTS

- 30% export

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The inshore trawl fishery catches hake and Agulhas sole on the south and east coasts of South Africa. Fishing is in waters shallower than 200m. Catch discharge and processing facilities are mainly located in the ports of Mossel Bay and Port Elizabeth.
The deep-sea trawl fishery operates on well-established trawl grounds that extend from the Namibian border to the extreme eastern part of the Agulhas Bank near Port Elizabeth. Exploitation is predominantly in 300 to 800m water depth and waters shallower than 200m on the south coast.

The hake deep-sea trawl fishery catches approximately 84% of the annual hake total allowable catch – about 120 000 tons per year. The fishery is certified sustainable by the Marine Stewardship Council (MSC).

SADSTIA members range from large, vertically integrated companies to medium-sized entities and small, diversified operators (with rights in other fisheries). A socio-economic study of the hake deep-sea trawl fishery conducted in 2018 estimated the fishery delivers R.6.7 billion to the South African economy every year.

CHALLENGES

- Ensuring that the unique economic characteristics of the fishery are fully considered when rights are allocated in 2021.
- The threat of marine mining.
- The recapitalisation of the aging fishing fleet.

OPPORTUNITIES

- Achieve re-certification by the MSC in 2020.

There are two species of hake in South African waters: shallow-water hake (Merluccius capensis) and deep-water hake (Merluccius paradoxus). Although these are two separate species, there is an overlap in their distribution and they are caught, processed and sold under the name “Cape hake”.

More information: www.sadstia.co.za
The hake longline fishery operates out of harbours from Port Nolloth to Port Elizabeth, but the greatest proportion of the fishing fleet is based on the Cape west coast. The catch is mainly preserved fresh on ice, but a small and growing number of vessels are adding value and freezing the catch at sea.

In 2019 there were 119 rights holders and 40 registered vessels, all of which participated in the recently completed SAHLLA Fishery Improvement Project.

CHALLENGES

- Availability of Fishery Control Officers to monitor vessel offloads.
- Cost of operations versus size of allocations (quotas).
- Current allocation to longline right holders is not economically viable, with no room for new entrants.
- High cost of successfully completed Fishery Improvement Project Action Plan (at-sea observers).

OPPORTUNITIES

- Improved government efficiency in processing applications and providing infrastructure, e.g. safe mooring and synchro lifts (for vessel maintenance).
- Retaining SASSI green status for both species of hake and kingklip and possible Marine Stewardship Council certification of the fishery.

More information: http://www.sahlla.co.za

| MEMBERS | 112 |
| % REPRESENTIVITY | 94\% of rights holders |
| BLACK OWNERSHIP | >80\% |
| BOATS | 50 to 60 wood, steel and GRP longliners (15 to 30m) |
| INVESTMENTS | >R200 million |
| EMPLOYEES | 1 500 to 2 000 (90\% men / 10\% women) |
| ANNUAL AVERAGE CATCH | 9 550 tons (6.4\% of the hake TAC) |
| CATCH VALUE | >R363 million |
| MARKETS | 65\% export |

An economic study of the hake longline fishery is currently underway. The results might alter the economic indicators presented here.
The midwater trawl fishery targets Cape horse mackerel using a cone-shaped net pulled through the centre of the water column (in contrast with bottom trawling where a net is pulled along the seabed).

Horse mackerel are generally frozen at sea in whole form, yielding a low value product and a cheap source of protein. Markets are in South Africa (mainly the northern provinces) and other African countries, most notably Cameroon, Nigeria, Democratic Republic of Congo, Angola and Mozambique.

The fishing fleet consists of one large dedicated midwater trawler and four deep-sea trawlers. The deep-sea trawlers only catch horse mackerel at certain times of the year.

Following the 2015/2016 allocation of rights to this fishery, membership of SAMTA was disrupted and the number of rights holders represented by the Association has fallen from 100% to 50%.

**CHALLENGES**
- In 2015/2016 more than 50% of the total allowable catch was awarded to new entrants, all small companies without the resources to invest in the fishery and/or harvest their allocation. The individual quotas are too small to warrant investment.

**OPPORTUNITIES**
- Returning the rights to a group of serious fishers who deploy effort and harvest the resource sustainably.
The South African Tuna Association represents operators in two distinct fisheries:

- Vessel owners and operators that utilise the longline method to catch big eye tuna, yellowfin tuna, southern bluefin tuna and swordfish across the entire South African exclusive economic zone. Pelagic sharks (mako and blue sharks) are a bycatch of this fishery.

- Pole and line operators that catch predominantly albacore (also known as long-fin tuna) up to 1 000 km off the south and west coast of South Africa. Yellowfin, big eye and southern bluefin tuna and snoek are also caught in this fishery.

Challenges:

- Operational costs.
- The pole & line fishery is entirely reliant on catching large volumes of albacore tuna which migrate into South African waters.
- A lack of suitable vessels means that the majority of longline rights are inactive.

Opportunities:

- Access to a wider variety of species will encourage vessels to search for albacore.
- Possible Marine Stewardship Council certification for the South Atlantic Albacore fishery, pending approval of funding for the implementation of a Fishery Improvement Project Action Plan.

Tuna, swordfish and pelagic sharks are migratory species that are fished by a number of nations and their management is the responsibility of fishery management organisations, including the International Commission for the Conservation of Atlantic Tunas and the Indian Ocean Tuna Commission.
The Large Pelagic Small Medium & Micro Enterprises Association represents tuna pole operators that catch albacore (also known as longfin tuna), yellowfin tuna, big eye tuna and southern bluefin tuna mainly inside the 200 nautical mile exclusive economic zone, but occasionally outside of it. Fishing takes place on the west and south coasts and members of the Association typically discharge their catch in Cape Town and Hout Bay harbours, and occasionally at other authorised landing sites.

**CHALLENGES**
- Uncertainty around fishing rights allocation and the short term of such rights.
- Poor management of harbours and a lack of basic facilities such as fuel, ice, waste management and security.
- A lack of suitable fish processing and storage facilities in harbours.

**OPPORTUNITIES**
- Certification of the tuna pole fishery by the Marine Stewardship Council. A pre-assessment is underway but the costs of certification might be prohibitive.
- Create an operating environment in which industry and Government work towards a growing, well-managed and sustainable fishery.
The longline fleet targets four species of tuna, and also catches swordfish and pelagic sharks, within and outside the exclusive economic zone of South Africa.

South Africa has been allocated the following quotas by the International Commission for the Conservation of Atlantic Tunas (ICCAT):

- 4 400 tons of South Atlantic albacore for the fishing seasons 2017 to 2020.
- 1 001 tons of south Atlantic swordfish for the 2018/19 fishing season.
- 3 500 tons of bigeye tuna per annum.
- 450 tons of southern bluefin tuna for the fishing seasons 2018 to 2020.

The large pelagic longline fleet targets these species within and outside the South African exclusive economic zone. Markets are mainly in the United States, Japan and Europe.

**CHALLENGES**

- Bureaucratic and administrative delays.
- Capital cost of sophisticated longline vessels.
- Management measures constraining effort on southern bluefin tuna performance.
- Delays caused by limited opportunities to discharge during office hours. This causes serious marketing challenges.
- Seismic surveys radically impact large pelagic species.

**OPPORTUNITIES**

- The sector has the potential to grow, improve skills and increase employment.
- Improved shore-based processing facilities for added value production.
- Electronic catch documentation scheme for improved efficiencies to boost market options.
- The sector has the potential and actively aims to directly contribute towards the goals of the National Development Plan, transformation and the growth of small- and medium-sized fishing operations.
SAPTIA – South African Patagonian Toothfish Industry Association

The Patagonian toothfish fishery operates in South Africa’s exclusive economic zone around the Prince Edward Islands. The island group, which consists of Marion and Prince Edward islands, is located about 1,800 km southeast of Port Elizabeth.

Patagonian toothfish occur at depths of between 70 and 1,600 m around sub-Antarctic islands and seamounts. Two South African-flagged longline fishing vessels are licensed to catch Patagonian toothfish within South Africa’s exclusive economic zone around the Prince Edward islands. The annual average catch is about 400 tons per year. Markets are in the United States, Japan, China and Korea.

Licenses are allocated by South Africa, within the framework of the Convention for the Conservation of Antarctic Marine Living Resources (CCAMLR), the regional fisheries management organisation responsible for regulating the fishery in the Southern Ocean.

CHALLENGES
- Rebuilding the resource after prolonged illegal, unreported and unregulated (IUU) fishing.
- Containing operating costs.
- Whale predation (whales eat the fish off the hooks).
- Maintaining strong and stable market demand.
- Sourcing competent fishing crews.

OPPORTUNITIES
- A stock rebuilding strategy aims to grow the TAC, currently at 543 tons, to 2,000 tons.
- Finding a fishing system that eliminates whale predation.
- Reducing fuel consumption.

MEMBERS 5
% REPRESENTIVITY 83%
BLACK OWNERSHIP 62.8%
BOATS 2 longline vessels
INVESTMENTS R85 million
EMPLOYEES 80 98% men / 2% women, 100% full-time employees
ANNUAL AVERAGE CATCH 400 tons
CATCH VALUE R85 million
MARKETS 99% export
# A guide to the fish types caught, processed and produced

<table>
<thead>
<tr>
<th>Fish type</th>
<th>Species name and other names</th>
<th>Main markets</th>
<th>Commonly served as</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Squid</strong></td>
<td><strong>Loligo reynaudii</strong></td>
<td>Southern Europe and Japan</td>
<td>Calamari</td>
</tr>
<tr>
<td></td>
<td>Calamari</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Small pelagic fish</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Sardine</td>
<td>• <em>Sardinops sagax</em></td>
<td></td>
<td>Canned sardines: South Africa and SADC countries</td>
</tr>
<tr>
<td></td>
<td>• <em>Engraulis encrasicolus</em></td>
<td></td>
<td>Fishmeal: East Asia (China, Japan); Europe and the Middle East</td>
</tr>
<tr>
<td>• Anchovy</td>
<td>Sardines are commonly called “pilchards”</td>
<td></td>
<td>• Canned pilchards</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• The anchovies you eat on pizza are mainly imported from Spain; South African anchovies are used for fishmeal, an ingredient in animal feeds</td>
</tr>
<tr>
<td><strong>Hake</strong></td>
<td>Deep-water hake <em>Merluccius paradoxus</em></td>
<td>Europe; Australia; USA; South Africa</td>
<td>Hake fillets</td>
</tr>
<tr>
<td></td>
<td>Shallow-water hake <em>Merluccius capensis</em></td>
<td></td>
<td>Fish &amp; chips</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Fish fingers</td>
</tr>
<tr>
<td><strong>Horse mackerel</strong></td>
<td>Cape horse mackerel <em>Trachurus capensis</em></td>
<td>South Africa (mainly the northern provinces) and other African countries, most notably Cameroon, Nigeria, Democratic Republic of Congo, Angola and Mozambique</td>
<td>Fish stew</td>
</tr>
<tr>
<td>Fish type</td>
<td>Species name and other names</td>
<td>Main markets</td>
<td>Commonly served as</td>
</tr>
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<tr>
<td><strong>Tunas</strong></td>
<td>Lonfin tuna, <em>Thunnus alalunga</em></td>
<td>China, Japan and Europe</td>
<td>Sashimi</td>
</tr>
<tr>
<td></td>
<td>Yellowfin tuna <em>Thunnus albacares</em></td>
<td></td>
<td>Sushi</td>
</tr>
<tr>
<td></td>
<td>Southern bluefin tuna <em>Thunnus maccouyi</em></td>
<td></td>
<td>Tuna steaks</td>
</tr>
<tr>
<td></td>
<td>Big eye tuna <em>Thunnus obesus</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Swordfish <em>Xiphias gladius</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>South coast rock lobster</strong></td>
<td><em>Palinurus gilchristi</em></td>
<td>USA (80%) Europe (19%) South Africa (1%)</td>
<td>South African cold water lobster tails</td>
</tr>
<tr>
<td><strong>West coast rock lobster</strong></td>
<td><em>Jasus lalandi</em> Commonly known as <em>kreef</em></td>
<td>China and Japan</td>
<td>Kreef on the braai, eaten with your hands</td>
</tr>
<tr>
<td><strong>Patagonian toothfish</strong></td>
<td><em>Dissostichus eleginoides</em></td>
<td>USA, Japan, China (Hong Kong) and Korea</td>
<td>Fillets or steaks Very rare on the menus of South Africa’s restaurants</td>
</tr>
</tbody>
</table>
Fishing for a sustainable and equitable future

FishSA is an umbrella organisation that works for the good of the South African fishing industry. It represents 12 fisheries associations that jointly harvest, process and market about 500 000 tons of fish per year. These products are sold into the local market and exported to all four corners of the globe. Whereas some low-value fish species are an important source of affordable protein for millions of South Africans, other species are highly appreciated on export markets and generate foreign exchange and economic benefits for South Africa.

This brochure introduces the 12 member associations of FishSA. It determines the extent of their membership, describes the fisheries they depend on – quantifying the annual harvest and the value of each fishery – and estimates the degree to which each fishery has transformed since 1994, when government first linked the allocation of commercial fishing rights to black economic empowerment.

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