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Ministério da Economia e Planeamento

PLANAPESCAS

Plano Nacional de Fomento das Pescas

ÍNDICE

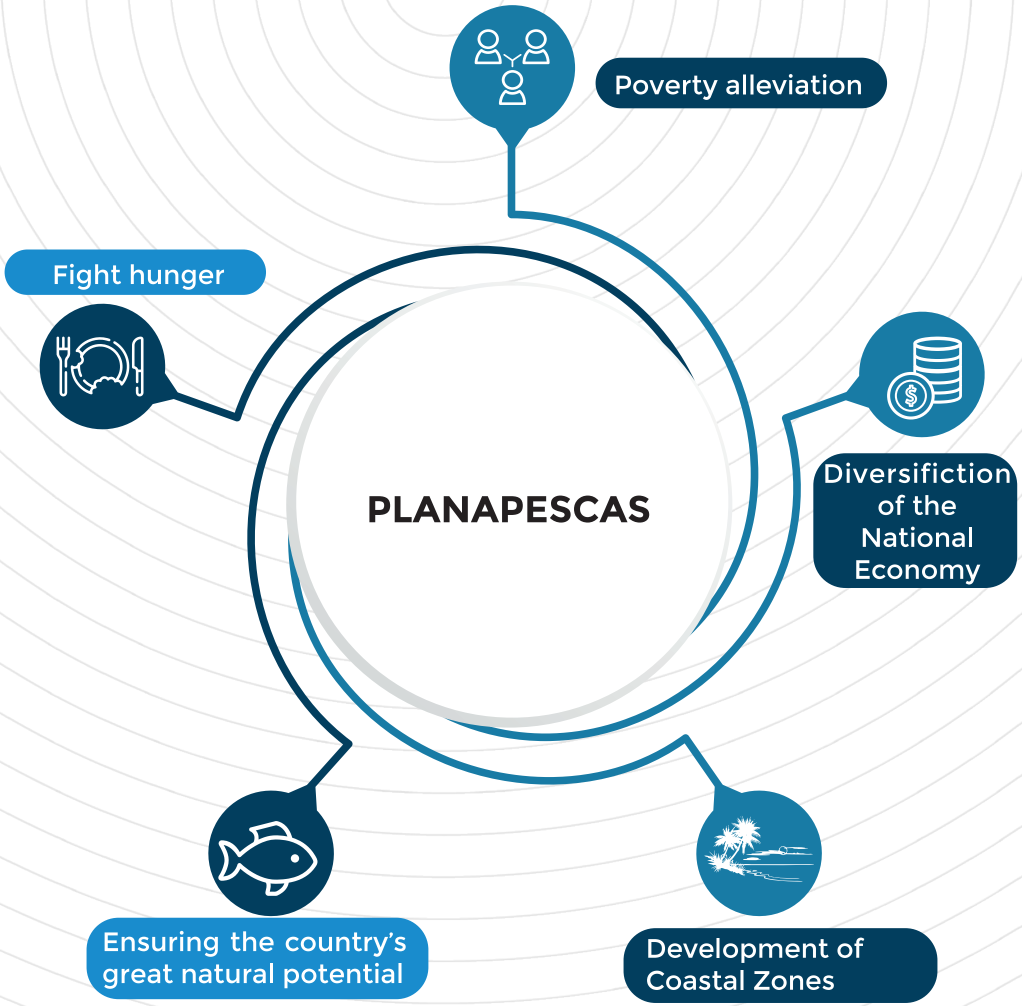
I.INTRODUCTION AND BACKGROUND

1. National Plan for the Promotion of Fisheries, PLANAPESCAS is a national plan, aimed at promoting business fishing activity, essentially to increase the production and processing of fish and salt.

2. PLANAPESCAS is part of the Government's policies aimed at combating hunger, reducing poverty and diversifying the national economy, and aims, fundamentally, to promote the development of coastal areas, carry out the transfer of knowledge, guaranteeing the great natural potential that the country offers in the fisheries sector to contribute significantly to the country's economic development.

3. Angola has competitive advantages and natural potential in the Fisheries Sector, a coastal zone with high biological productivity, as well as one of the largest hydrographic networks in Africa, soils, temperature and native species.

- Coastal zone with high biological productivity
- One of the biggest networkswatersheds of Africa
- Favorable temperature
- Native species



II. GENERAL OBJECTIVES OF PLANAPESCAS

The following are the general objectives of PLANAPESCAS:

a) Boost the regular supply of fish to the population;

b) Ensuring food safety;

c) Promote connectivity in the Sector;

d) Foster an increase in fishing, aquaculture and salt production and productivity;

e) Ensure the sustainable management of living aquatic resources;

f) Develop aquaculture and salt production activities in a sustainable manner;

g) Promote corporate social responsibility in protecting fishing communities;

For the period from 2023 to 2027, PLANAPESCAS has 10 specific objectives, namely:

a) Boost food self-sufficiency in fish products and derivatives, contributing to food security and diversification of exports, substitution of imports and economic growth;

b) Modernize the support infrastructure for the production and processing of fish;

c) Encourage the production of inputs (feed, vessels, cork, lead, etc.) for the fishing industry;

d) Improve the fish conservation and distribution network;

e) Promote the strengthening of relationships and distribution of fish;

f) Foster the development of the Fisheries Sector value chain and promote the production of derivatives (flour, fish oil, etc.) from waste;

g) Foster the fish processing industry;

h) Foster aquaculture (continental and marine) and the creation of marine protected areas;

i) Foster the extraction and cleaning of salt and its derivatives on a large scale; It is

j) Ensure the quality, diversity and availability of aquatic biological and genetic resources.

III. SUPERVISION AND SCOPE

The National Plan for the Promotion of Fisheries, called PLANAPESCAS, is supervised by a Multisectoral Commission, coordinated by the Minister of State for Economic Coordination and assisted by the Minister of Fisheries and Marine Resources, which has the support of a Technical Monitoring Unit – UTA, and its implementation fits throughout the entire national territory.

PRODUCTION AND CONSUMPTION DIAGNOSIS
In global terms, there was a 3% increase in fishing production, with a special emphasis on 20% in Aquaculture, in the period from 2017 to 2021.

PRODUCTION HISTORY BY TYPE OF FISHING (TON) table (1)
Regarding salt production, from 2017 to 2021, there was an average annual increase of 20%, as shown in the table below.

Type of fishing	2017	2018	2019	2020	2021	Variation absolute	Rate of Average Annual Growth
Industrial and semi-industrial	299 303	239 551	260 625	230 347	335 280	35 977	3%
Handcrafted. Maritime	207 771	171 810	98 585	112 246	233 799	26 028	3%
Handcrafted. Continental	23 601	29 032	16 762	9 778	24 173	572	1%
Aquaculture	1 339	1 752	1 925	2 060	2 808	1469	20%
total	**32014**	**442255**	**377897**	**354431**	**596060**	**54**	**3%**

Source: Ministry of Agriculture and Fisheries

SALT FILLER PRODUCTION (TONS) table (2)

Product	2017	2018	2019	2020	2021	Variation absolute	Rate of growth (Average Annual)
Salt	106 214	103 439	109 446	164 431	201 699	1 469	20%

Source: Ministry of Agriculture and Fisheries

DOMESTIC CONSUMPTION table (3)

	Unit	2017	2018	2019	2020	2021	Variation absolute	Growth rate (Annual average)
Catch (including aquaculture)	Ton	5 01432	442 255	377 897	354 431	596 060	64 046	3%
Export	Ton	33 718	79 120	7 522	19 037	20 060	-13 658	12%
Import	Ton	60 573	18 223	3 051	7 734	3 530	-57 043	51%
Consumption Internal	Ton	558 869	381 358	373 426	343 128	579 530	20 661	1%
Per capita consumption	Kg/Person	20	13	12	11	18	-2	3%

IV. SWOT ANALYSIS OF FISHING ACTIVITY

This table illustrates the factors that influence the internal environments (opportunities and threats) and external environments (strengths and weaknesses) in the various segments of the fisheries value chain, allowing a quick and conscious view of the situation

FORCES

Existence of organized and functional associations and cooperatives in the fisheries sector;

Existence of a business fabric committed to the development of the sector;

Existence of fingerling production centers and some infrastructure to support fishing;

Oceanographic conditions favorable to the development of maritime aquaculture (maricultural);

There is a marine and fisheries research institute with scientific research applied to the fisheries sector;

There are legislation and strategic planning documents for the sector, including management measures.

WEAKNESSES

Low investment in fisheries research;

Little training of human resources in the various branches of the sector;

Weak free diversification of larviculture species;

Low efficiency of the national fleet due to its obscene state and reduced technological capacity;

Insufficient land infrastructure for unloading, conservation, processing and transformation;

Low efficiency of the trading circuit
Weak sensitivity of operators and fishing communities in the sustainable management of resources;

Difficulty in assigning the Total Allowable Catch (TAC) by species in the group of others, due to the great diversity of species, with similar behavior and biological characteristics;

WEAKNESSES

Insufficient technical means, training and specialization, as well as social conditions for employees in the sector;

Fragility of the aquaculture inspection system;

Scarcity of manufacturing industries for fishery products, such as: semi-prepared, dried fish, canned preserves, etc.;

Lack of mixing machines for salt iodization;

Dependence on obtaining iodine from outside;

Difficulty in protecting areas where salt pans are being developed;

Outdated legislation on salt;

Lack of dealerships for engine and vessel brands and specialized technical assistance;

Insufficiency of naval shipyards for the construction and repair of vessels;

Insufficient supplies and equipment for aquaculture production;

WEAKNESSES

Difficulty accessing salt pans and aquaculture units (access and communication routes;

Insufficient production and distribution of improved fingerlings;

Time series discontinuity of fisheries resource biomass estimates.

OPPORTUNITIES

Growing demand for fishery products, namely fresh, frozen, pre-prepared and other presentations;

Growing demand for safe processed products produced in an environmentally sustainable way and with quality;

Availability of alternative raw material for feed production;

Search for places selling prepared and value-added fish (fishmongers);

Existence of a National Strategy for the Sea in Angola and a Marine Space Order Plan, which defines the potential areas for carrying out the various economic activities at sea;

Vast border with bordering and landlocked countries with strong demand for products in the weight sector;

Relationship between manufacturing industries possibility of renewing and modernizing the national fishing fleet.

THREATS

Impact of climate change and water pollution on the quality and health of products;

Destruction of marine systems and poor management of mangroves;

Destruction of estuaries and reserved areas Increased conflicts between the various segments of the fleets and between other players;

Illegal, unregulated and unreported fishing, which constitutes a threat to the sustainability of fish resources at national and global level.

V. GOALS TO ACHIEVE

PLANAPESCAS is projected to achieve, by 2027, the targets established in terms of fishing and salt production in the order of 4% and 15%, based on the results of population growth and investments in processing companies.

Production target (thousand tons) table (4)

		2021	2022	2023	2024	2025	2026	2027	Growth Rate (Annual Average)
Fishery production	**Industrial and Semi-Industrial**	335,280	342,321	349,510	356,343	364,343	379,994	379,806	**2%**
	Handmade Maritime	233,799	248,528	264,186	280,829	298,522	317,328	337,320	**6%**
	Continental Handmade	24,173	24,487	24,805	25,128	25,455	25,786	266,121	**1%**
	Continental aquaculture	2.808	3,370	4,044	4,852	45,823	6,987	8,385	**20%**
	Marine Aqua-culture-mariculture				128	131	134	157	**7%**
	Total Fishing	596,060	618,706	642,544	667,787	694,273	722,229	751,789	**4%**
Production salt pan	**Salt**	201,699	213,801	248,332	285,582	331,275	390,904	472,994	**15%**

Source: Ministry of Agriculture and Fisheries

Other relevant PLANAPESCAS goals worth mentioning:

- Population growth rate of 3% per year;

- Per capita fish consumption of 20 kg per year;

- Existence of annual management measures published annually that determine the Total Admissible Catch -TAC, and its growth is expected until 2027 with the exploration of new resources, including resources, namely those of deep waters;

- Average growth in fishing production of 4% during the term of PLANAPESCAS;

- Favorable oceanographic conditions for the development of aquaculture and salt extraction participation in salt extraction;

- Guarantees an average growth of 15% in wage production, during the term of PLANAPESCAS;

CONSUMPTION NEED PROJECTION (tons) table (5)

Ton Consumption Projection							
	2022	2023	2024	2025	2026	2027	Growth (Annual Average)
Production fishing	661 726	681 882	702 435	723 419	744 870	766 803	3%
Production salt pan	204 804	237 105	270 065	310 364	359 948	421 300	13%

Fonte: Ministério da Agricultura e Pescas

COVERAGE OF NATIONAL CONSUMPTION NEEDS table (6)

Coverage rate of consumption by domestic production							
	2022	**2023**	**2024**	**2025**	**2026**	**2027**	**Situation at the end of the Period**
Production fishing	93,5%	94,2%	95,1%	96,0%	97,0%	98,0%	**Deficit**
Production salt pan	104,4%	104,7%	105,7%	106,7%	108,6%	112,3%	**Surplus**

Source: Ministry of Agriculture and Fisheries

ALLOWABLE CATCH (TAC) BY SPECIES GROUP (tons) table (7)

Species Group						
	2023	**2024**	**2025**	**2026**	**2027**	**Total**
Crustaceans and Cephalopods	5 446	5 595	5 954	5712	4091	26 798
Demersal	60 153	62 119	64 085	66 051	68 017	320 425
Pelagic	281 000	281 000	281 000	293 950	306 900	1 443 850
Total	346 599	348 714	351 039	365 713	379 008	1 791 073

Source: Ministry of Agriculture and Fisheries

GUIDANCE FOR THE IMPLEMENTATION OF PLANAPESCAS

- **Fishing Fleet**
The following factors contribute to the renewal of the PLANAPESCAS fishing fleet:

a) Support industrial, semi-industrial and artisanal renovation with advanced technology in the following types of fishing and respective gear: coastal fishing and tuna fishing, gill, longline and fish cages;

b) Support the acquisition/replacement of medium-sized vessels with fencing gear (up to 30 meters in length outside);

c) Support the renewal of artisanal fishing fleets;

d) Speed up the authorization process for the purchase of industrial and semi-industrial vessels;

e) Speed up the process of accessing credit for the acquisition of vessels.

- **Provision of Services and Inputs**
a) Foster the acquisition of breeding stock for nursery, feed and preservatives;

b) Foster the purchase of medicines to boost aquaculture;

c) Encourage the purchase of iodine for the salt industry;

d) Support the acquisition of artefacts, primary and secondary packaging for fishery and aquaculture products;

e) Encourage and promote the emergence of services aimed at improving the production process, which will allow obtaining internationally accepted quality certification.

- **Infrastructure and framework for logistics and distribution**

a) Foster the construction and production of fishing and aquaculture artifacts;

b) Foster the construction, rehabilitation and equipping of shipyards;

c) Support the implementation of feed and canning factories;

d) Support the construction of unloading points and auctions;

e) Support the implementation of fish conservation and technological processing units;

f) Support the mechanization, acquisition of equipment and expansion of the salt industry;

g) Foster the modernization of the fish distribution and commercialization network under bio-sanitary conditions;

h) Support the construction of centers for lavish farming and fish fattening;

i) Support the implementation of aquaculture production projects (continental and marine);

j) Encourage the acquisition of equipment for maritime control and safety (compass, GPS, among others) of vessels licensed for fishing activity; It is

k) Foster the emergence of dealerships for boat engine brands and specialized technical assistance.

- **Marketing policy**

a) Implementation of national production protection legislation, giving priority to the acquisition of existing fishery products on the internal market, in relation to imports;

b) Encouraging fishing operators to adhere to the Made in Angola, to provide better access to the internal and external market as well as more training;

c) Promote fairs and auctions for the sale of fish products and derivatives.

BUSINESS ENVIRONMENT

a) Reduce bureaucracy in the process of issuing fishing licenses and authorization to purchase vessels;

b) Facilitate the process of accessing credit for the fisheries sector;

c) Intensify and direct foreign direct investment training actions for fisheries, within the scope of economic diplomacy, formulate the proposal/project for the creation of technology and knowledge transfer centers, through protocols between the private sector and Research Centers Technological;

d) Stimulate the emergence of insurance for fishing activity with public and private insurance institutions. Specific insurance for fishing activities can help entrepreneurs to mitigate activity risks and allow the reduction of interest rates;

e) Promote the creation of Support Centers for Artisanal Fishing and Community Villages;

f) Develop actions that promote and facilitate the creation of new cooperatives;

g) Study the possibility of revising current legislation on the exploitation and import of certain living marine resources; It is

h) Revision of legislation in order to promote the development of aquaculture and salt production.

FINANCIAL PRODUCTS INSTRUMENTS

PLANAPESCAS will be operated by the Development Bank of Angola (BDA), which will grant bank credits dedicated to the financing of projects for the acquisition of inputs, projects destined to the creation and operationalization of production capacity and transformation of fish products and their derivatives.

The operationalization of the PLANAPESCAS financing will be carried out with the development of installations and production plants, infrastructure, machinery and equipment, as well as the provision of financial products to finance working capital and to support distribution and other services, namely:

- Fishing and its by-products;
- Aquaculture and its derivatives;
- Salt and its derivatives.

The financing line is also intended for the development of anchor projects, essential for increasing the production and/or disposal of the goods referred to in the previous point, in order to improve the interaction of value chains at national level, namely:

- Infrastructure construction;
- Construction of vessels;
- Production of inputs;
- Feed production;
- Production of machinery and equipment for the Pisicola sector;
- Industrial production derived from the transformation of products;
- Creation and development of logistics platforms;

VI. FINANCIAL RESOURCES

PLANAPESCAS will have a 5-year financing package, in the amount of Kz 144 billion (One Hundred and Forty-Four Thousand Million Kwanzas) to be provided by the Development Bank of Angola.

PLANAPESCAS	2023	2024	2025	2026	2027	Total
Package Financial	28800000 000,00	28800000 000,00	28800000 000,00	28800000 000,00	28800000 000,00	144 000 000 000,00

VII. GOVERNANCE AND INDEPENDENT CONTROL SYSTEM

The rapid transformation of the fisheries sector towards economic growth and food security at farm level required strategic investments in production, value chain and support infrastructure. PLANAPESCAS defines principles aimed at public investment and attracting private investment to achieve policy objectives. Thus, the following principles will be used to determine the alignment between public investment and private investment:

• Sector. Public act as a market enabler to leverage all its potential;

• Ensuring the supply of public goods directed to the Fisheries Sector (Infrastructures, research, training and technical qualification) that benefit society that cannot be provided by the Private Sector;

• Ensuring an enabling environment, through predictable and stable public policies;

• Address market failures through appropriate instruments and incentives, better coordination and information management.

COORDINATION

The implementation of PLANAPESCAS will be coordinated by the Multisectoral Supervision Commission, coordinated by the Minister of State with the Economic Coordination and integrated by the Heads of the Ministerial Departments, responsible for Fisheries and Marine Resources, Economy and Planning, Finance, Agriculture and Forestry, Industry and Commerce , Land Administration, Energy and Water, Public Works, Urban Planning and Housing, Education Higher Education, Science, Technology and Innovation.

The aforementioned Multisectoral Commission will have the support of a Technical Monitoring Unit - UNTA, coordinated by the Secretary of State for Fisheries and Marine Resources, and made up of representatives of the Sectors that make up the said Commission.

VIII. BRIEF CHARACTERIZATION

Fishing
The marine fishing industry is divided into 3 fleet segments, industrial, semi-industrial and artisanal. The country also has continental artisanal fisheries.

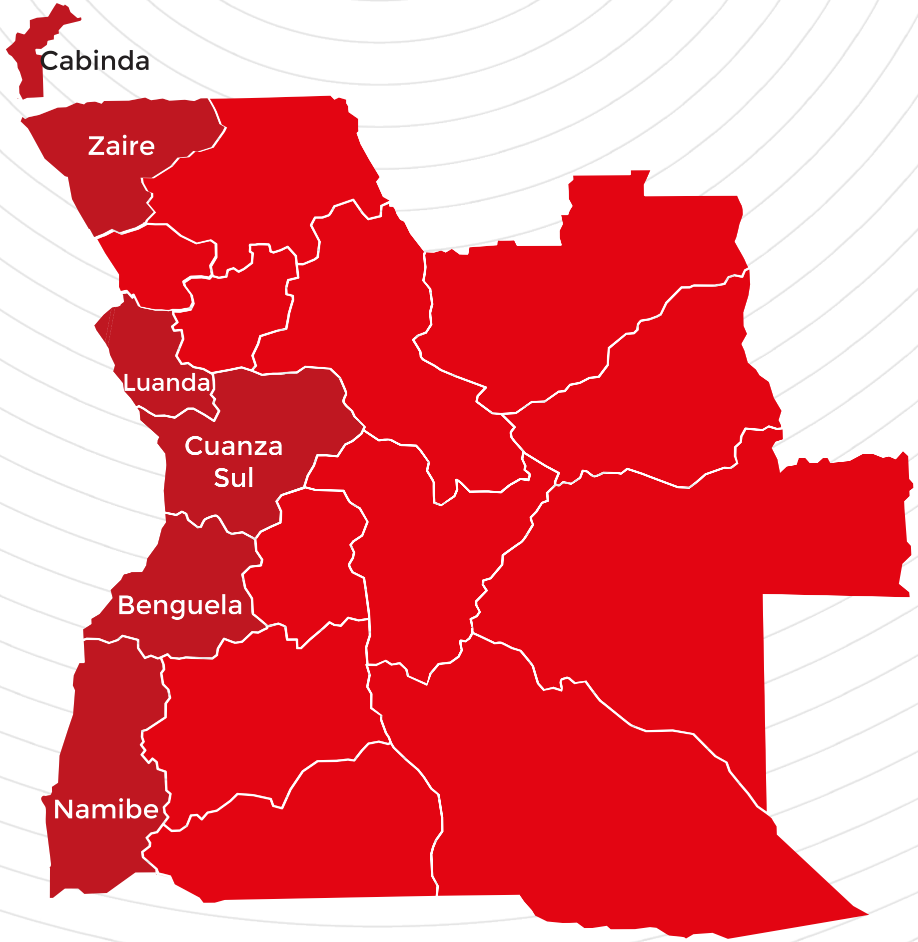
Largest fishing centers in the country:
Luanda
Benguela
Namibe
Cuanza-Sul
Zaire
cabinda

CHARACTERIZATION OF FISHING GEAR
Continental artisanal fishing
Continental artisanal fishing is carried out in continental waters, by vessels of up to 6 meters in length, the most captured and sought after species are cacusso (species of the genera Oreochromis and Tilapia) and catfish (Ciarias gariepinus).
Catches in this fishing segment indicate an increase from 23,601 tons in 2017 to 29,032 tons in 2018 (table 1) decreasing in 2021 (24,173 tons).

Maritime artisanal fishing
Artisanal fishing currently has around 47,000 people, 30,000 of which are fishermen and 16,900 tons.

Aquaculture
Angola has aquaculture development potential in 17 provinces with the exception of Namibe province. In terms of Infrastructure, the Sector has 901 undertakings, of which 669 (74%) do not work.

Salt
The country's climatic and geographical conditions are excellent for the production of sea salt, through evaporation, especially in the Southern Provinces, namely Benguela and Namibe.
In global terms, salt production increased from 106 thousand tons in 2017 to 201.7 thousand tons in 2021



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