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DIRECTORATE OF INTELLIGENCE

12 May 1986

MEMORANDUM FOR: R. Randall Dentel  
African Coastal Security Program  
International Security Affairs, Africa  
Department of Defense

FROM: [Redacted]  
Chief, Geography Division

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SUBJECT: West African Fisheries

1. Attached is a typescript memorandum which examines the West African marine fishery resource--the current level of its exploitation, its economic significance for the region, and the degree of foreign involvement in the fishing industry. It also analyzes the status of management efforts, and assesses the prospects for fuller development of the industry. [Redacted]

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2. The research and analysis were done by [Redacted] the Africa/Western Hemisphere Branch, Geography Division, Office of Global Issues. [Redacted]

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Attachment:

West Africa: The Fisheries Dilemma  
GI M 86-020110

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SUBJECT: West Africa: The Fisheries Dilemma [Redacted]

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OGI/GD/AWH [Redacted] (6 May 86)

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SUBJECT: West Africa: The Fisheries Dilemma [Redacted]

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OGI/GD/AWH, [Redacted] (6 May 86)

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Central Intelligence Agency



Washington, D.C. 20505

**DIRECTORATE OF INTELLIGENCE**

21 April 1986

**West Africa: The Fisheries Dilemma**

**Summary**

West African states are unable to effectively manage or police their offshore waters, and heavy, often unrestrained exploitation of fish by Soviet and other non-African vessels poses a growing threat to the resource. Stocks of some of the main commercial species are in danger of depletion. A marked decline in the fisheries resource would further erode the stability of several West African states for whom marine fish provide an important source of foreign exchange. Destruction of a valuable source of protein would also be a grave loss to this food deficient region. [redacted]

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Non-Africans, including the Soviets, continue to be the main beneficiaries of the region's rich fisheries, harvesting almost 60 percent of the annual catch. The Soviets take 10 percent of their national catch in West African waters and derive both economic and political benefits from fishing agreements with regional countries. However, a growing awareness of the threat to marine resources, deteriorating economic conditions, and a greater concern for food security among West African states have made prospects for remedial actions more favorable now than at any time during the past decade. A number of countries including Guinea, Senegal, and Mauritania are requesting US assistance in the management of their fisheries.

[redacted]

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This memorandum was prepared by [redacted] Office of Global Issues. Information available as of 21 April 1986 was used in its preparation. Comments and queries are welcome and may be directed to the Chief, Africa/Western Hemisphere, Geography, OGI, [redacted]

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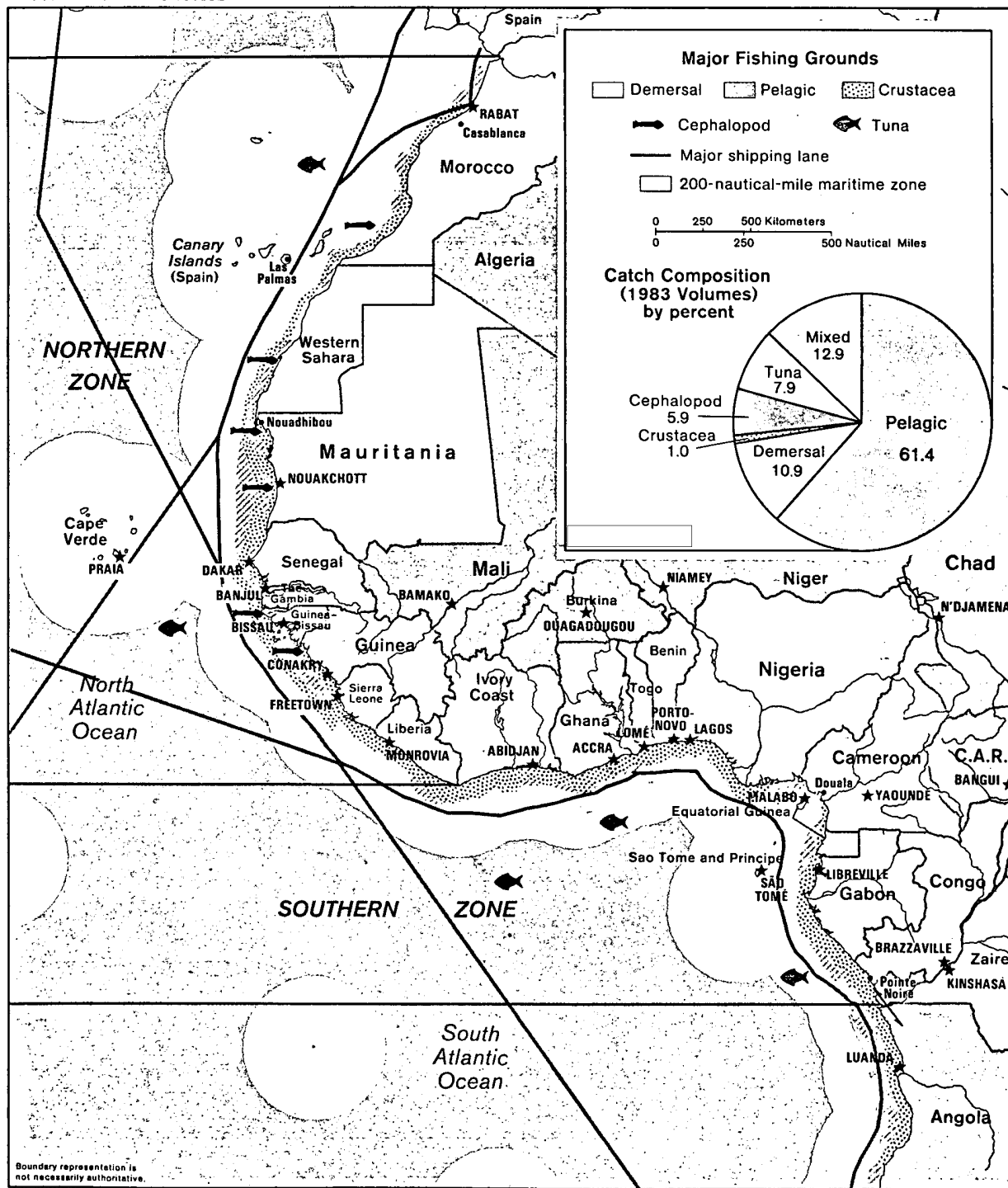
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West African Fisheries



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**Introduction**

The waters off West Africa support some of the richest concentrations of marine life in the world. Fisheries not only represent an important source of foreign exchange for a number of financially strapped coastal states, but provide the generally malnourished region with much needed protein. However, the inability of these states to exploit, manage, and police their offshore waters effectively has resulted in heavy, often unrestrained, exploitation by Soviet and other foreign fishing fleets. In fact, foreigners harvest about 60 percent of the reported catch, while the region as a whole remains a net importer of fish--many of which are caught in regional waters. [Redacted]

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The marine resources are now seriously threatened because of inadequate protection and poor management. Fishery experts believe that all of the major and many of the minor species are fully- to over-exploited, and are concerned that valuable breeding stocks are being endangered by illegal fishing techniques. There is also fear that unrestricted exploitation will result in a depletion of resources similiar to that which has occurred off the coast of Namibia. No littoral country in the region has the equipment, manpower, or funds necessary to enforce legal restrictions on fishing. Most of the states failed to develop appropriate management policies or to support such policies with adequate technical and administrative personnel. [Redacted]

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The Soviets have used fishing agreements in West Africa to gain legitimate commercial access to ports, facilities. <1> Because they rely on the Soviets for fishery assistance or fish supplies, a number of coastal states have continued to maintain these agreements despite suspicions that the Soviets are cheating them either by underreporting catches or through agreements which deprive them of scarce foreign exchange earnings. [Redacted] several of the region's socialist countries, disappointed with the failure of statist economics and with the lack of aid from the East Bloc, are turning to the West for assistance. US Embassy reports indicate that several would welcome US help in the management of their fisheries. [Redacted]

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Besides the USSR, non-African countries with substantial fishing capabilities in the region include Spain, South Korea, East Germany, Romania, and France. Of the Africans, only Morocco, Nigeria, Ghana, Ivory Coast, and Senegal have sizable industrial fleets. Throughout most of the region, traditional fishermen using small craft supply fish for domestic consumption. [Redacted]

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US interest in development and management of the marine fisheries is both humanitarian and strategic. Fish represent a readily available and ecologically sound source of additional protein for an area beset by recurrent drought and famine, and by

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chronic economic difficulties. An improvement in the ability of these countries to harvest and manage their fisheries would help conserve a valuable protein source, provide additional foreign exchange for the region's bankrupt economies, and reduce Soviet access to regional waters and onshore facilities. [REDACTED]

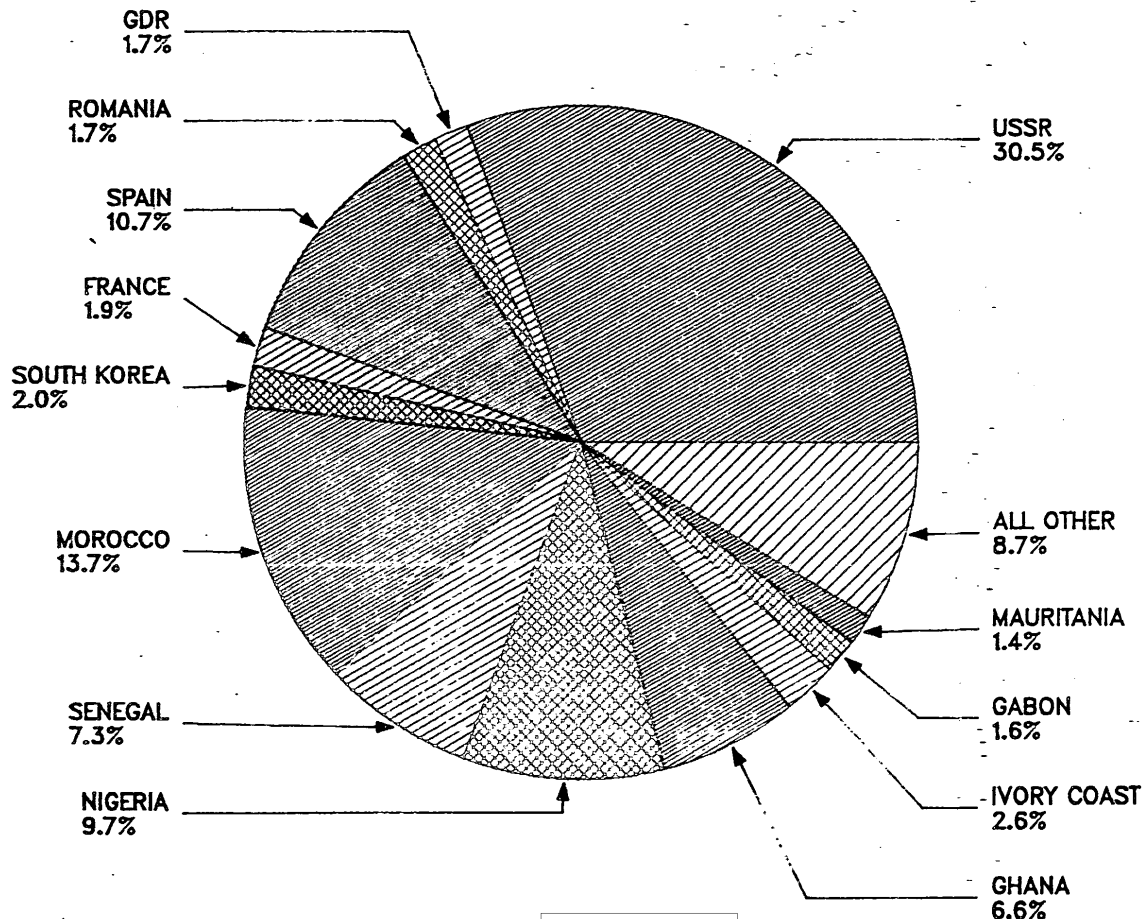
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# CATCH BY COUNTRY

1983







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THE FISHERY RESOURCE

The distribution of fish within West African waters is uneven, but two distinct zones are apparent: a Northern zone extending from Morocco through Liberia, and a Southern zone extending from the Ivory Coast through Zaire. (See Map) The richest concentrations of fish occur off the northwest coast; waters to the south are less productive. Foreign fishing vessels operate primarily in the north, but find markets for their harvest among the more heavily populated countries of the south.

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Five major types of fish are harvested:

Coastal pelagic species (sardines, sardinella, mackerel, etc.) account for about 60 percent of the region's catch by volume. Heavy exploitation of these species by Soviet and East European fleets as well as by local traditional fishermen in the Northern zone is placing stress on existing stocks. Management is difficult because of the migratory habits of the species.

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Cephalopods (cuttlefish, squid, and octopus) make up the region's most valuable catches. The main cephalopod grounds lie in the Northern Zone off Morocco, Mauritania, and Senegal. Spanish, Moroccan, South Korean, and Mauritanian vessels harvest most of the catch which is then marketed mainly in Europe and Japan. Signs of over-exploitation have been reported.

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Crustacea (mainly shrimp) are found mostly near river mouths and are fully exploited in both zones. Spanish and other non-African vessels harvest about half the total catch. Senegal exports significant amounts. The extensive involvement of traditional as well as industrial fishermen in shrimping makes proper management of the stocks difficult.

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Demersal fish (bottom-dwellers including seabream, hake, croakers, sole) are heavily exploited in the Northern Zone by Spanish, Portuguese, Soviet, and African industrial vessels. In the Southern Zone African fishermen exploit stocks in the inshore areas, but fishery experts see room for expansion offshore. Good management of this fishery is feasible because of the limited involvement of traditional fishermen.

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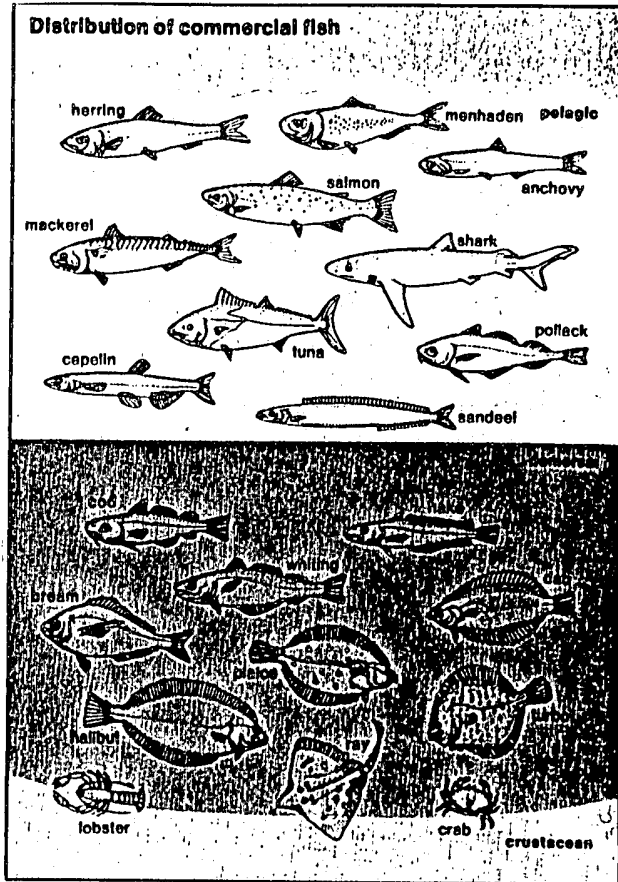
Ocean pelagic species (tuna) form an important resource for the African industrial fleets with both Ghana and the Ivory Coast harvesting significant amounts. Spanish and French vessels, using Abidjan, Ivory Coast as their main regional base, are also active. Recent reports indicate a possible decline in the West African tuna fishery, and prospects for good fishing in the Indian Ocean may draw more French, Spanish and other vessels out of West African waters.

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-PELAGIC

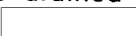
-DEMERSAL

-CRUSTACEAN  
-CEPHALOPOD

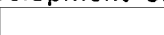


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### Non-African Involvement

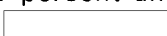
Despite a gradual decline during the past decade in their number, non-African vessels continue to report <3> harvests of over half the marine catch in the region, especially from the rich Northern Zone. Their home countries--the USSR and Spain in particular--take advantage of the still poorly developed local African fishing industry. Non-African vessels operate under a variety of arrangements e.g., country-to-country, multilateral, and private investment agreements. African states receive licensing fees, grants in aid, research and training, capital investments, or concessions in joint ventures in return for fishing rights. Joint ventures are attractive to many of the coastal states, because they supposedly promote the transfer of technology and provide for eventual local control of fishing. But in practice they often result in the stagnation of the local industry; they can deprive locals of needed foreign exchange and fish protein. For example, Estrela do Mar, the Guinea-Bissauan joint venture with the Soviets has drained foreign exchange earnings out of the country, according to US Embassy Bissau. 

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Most foreign assistance to West Africa's fishery sector is in the form of bilateral aid with Japan, Sweden, France, Norway, and Canada the major donors. The EEC, OPEC and other multilateral organizations are also major sources of aid. The impact of the assistance on increasing the amount of fish available for sale locally, however, has been limited. A recent AID funded study noted that assistance has been heavily weighted toward infrastructure and capital equipment for the industrial sector rather than toward the development of the traditional sector which provides most of the fish for the local market. 



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### Soviets and East Europeans

Soviet interest in West African waters is primarily economic with some secondary military considerations, while Romanian and East German interests are primarily economic. Fishing agreements in the region provide the Soviets access to local ports and allow them to position their vessels near international shipping lanes. The agreements also provide the Soviets, who rely heavily on their fishing industry for their protein needs, with about 10 percent of their national catch. Romania and East Germany are even more dependent on these waters for fish, with 60 percent and 40 percent respectively of their national catch coming from these waters. 

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In 1983 about a third of the regional catch by volume was landed by Soviet vessels. The Soviets are also a major supplier of fish products to West African coastal countries. The Soviets fish principally off the northwestern coast from Western Sahara to Liberia. Although they are suspected of poaching and of grossly underreporting catches, their vessels are only occasionally arrested for a fishing violation and operate

<3> Catch reports submitted by the Soviets and Eastern Block countries are commonly believed to be less than half of the catch actually taken; a recent study  estimates that actual Soviet catch may be three times that reported. Other foreign fleets also under report. 

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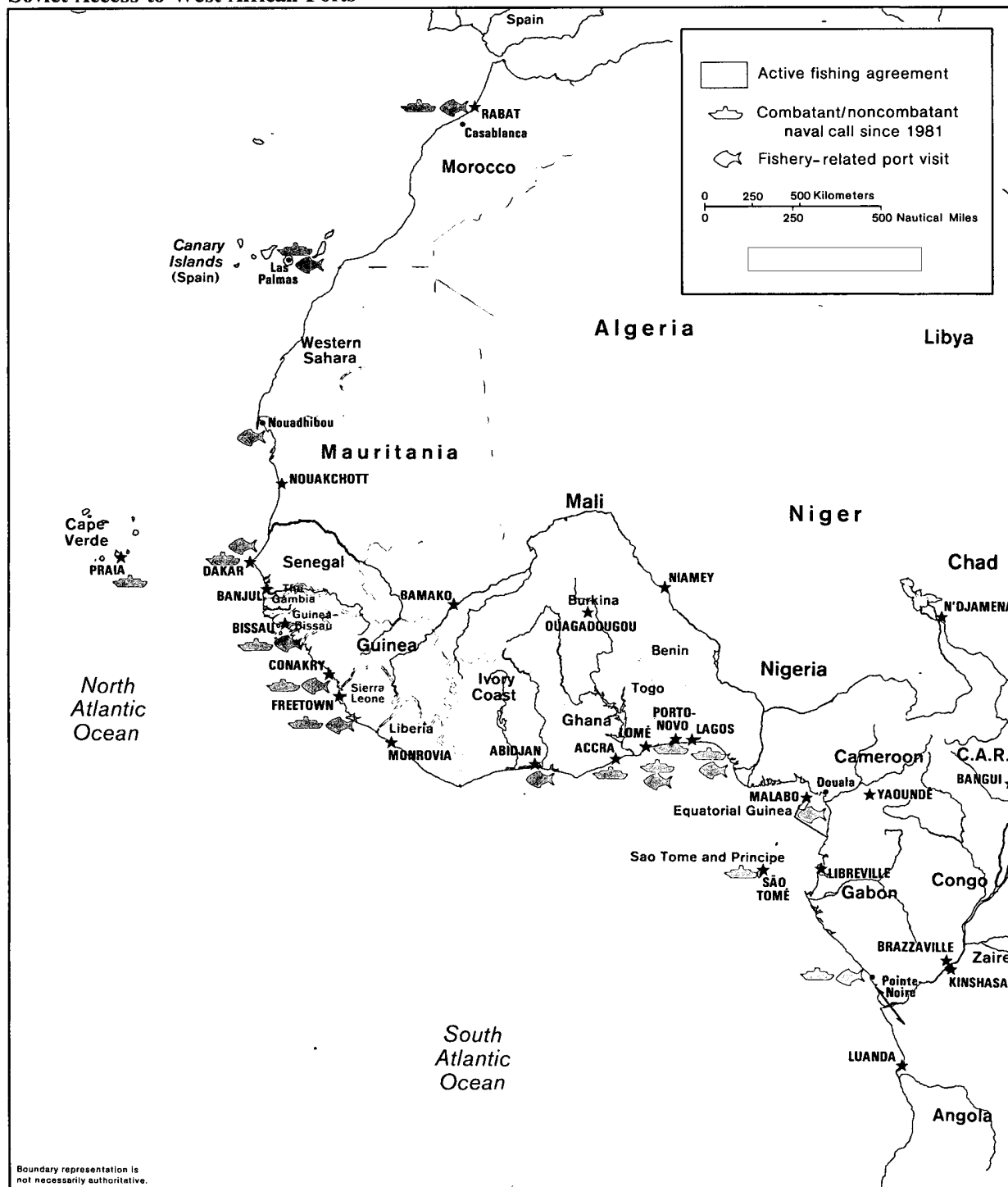
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Soviet Access to West African Ports



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Boundary representation is not necessarily authoritative. 707723 (A05794) 5-86

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largely unpoliced throughout the region. [redacted]

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The Soviets maintain fishing agreements with five countries in the rich northern zone. Establishment of fishery treaties began in the 1970s following the creation of 200-mile Exclusive Economic Zones. The treaties give Soviet vessels access to the region's fishing grounds and generally include provisions for training, the survey of resources, the establishment of processing plants, and the sale of fish to local markets. In return the Soviets often receive hard currency, a large percent of the catch, and use of local ports. [redacted]

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Fishing and trade in fish products allows Soviet vessels to reconnoiter regional ports. [redacted]

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[redacted] Port visits make it possible for the Soviets to position disguised naval intelligence ships with sophisticated surveillance equipment--often converted trawlers--near strategically important shipping lanes. [redacted]

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Some Soviet fishing agreements, such as those with Equatorial Guinea and Senegal, have been terminated, but others, such as those with Guinea, Guinea-Bissau, Sierra Leone, Mauritania, and Morocco, have been renegotiated despite unhappiness with Soviet performance. According to US Embassy Nouakchott, strained relations due to detention by Mauritians in 1984 of several Soviet vessels for illegal fishing activities have not curbed the growth of Soviet involvement in Mauritanian waters because Mauritania desperately needs fishing revenues and jobs for its populace. The Soviets plan a major drydock operation in Nouadhibou to support their augmented fishing fleet. Dissatisfaction has resulted from Soviet failure to provide promised shore facilities or training, or to deliver a sufficient percentage of catch to local markets. Even when fish are supplied, they are generally of poor quality. For both the Soviet and the West African traditional fishermen, coastal pelagic fish are the primary catch. The Soviets reportedly manufacture fish meal with much of their catch. [redacted]

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Soviet joint ventures with private Spanish (Sovhispan) and French (Fransov) interests are active in harvesting, marketing, and processing fish in the region. These interests facilitate the negotiation of fishing agreements, and provide avenues for economic and political penetration. According to US Embassy Freetown, the Fransov/Sierra Leone joint venture company (Sierra Leone Fishing Company) operates under an agreement which allows it to monitor Soviet catch in national waters. [redacted]

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Although the Soviets no longer have a fishing agreement with Senegal, they are suspected of fishing illegally in Senegalese waters, especially in the disputed waters of the south, according to Defense Attache reports. A recent report indicates that the Soviets have been pushing for an agreement allowing 10-12 trawlers off the southern coast. They use Dakar Marina for servicing and repair of vessels and Dakar International Airport for transferring crews. [redacted]

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Eastern European catch in the region has decreased over the past years, but Romanians and East Germans continue to harvest 60 percent and 40 percent respectively of their marine catch in the region. Their activities are concentrated in Mauritanian waters. According to FAO reports the Poles are no longer fishing in the area. [redacted]

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### Spain and Western Europe

The proximity of West Africa's productive waters to Europe draws many fishermen into the region. For Spain, which is being squeezed out of some of its traditional fisheries, waters off Morocco and Western Sahara are increasingly attractive. The favorable terms extracted by Morocco in its 1983 fishery agreement with Spain reflect the importance Spain attaches to these waters. The value of the catch by Spanish vessels in the region exceeds that of all other nations. From bases in the Canary Islands and southern Spain, Spanish vessels operate primarily off the coast of Morocco, Mauritania, and Senegal. They also fish in the Gulf of Guinea and in central African waters. Spanish vessels are frequently cited for violations and, like the Soviets, are suspected of overfishing and underreporting their catches. Operating within the framework of government-to-government and company agreements, they harvest tuna, crustacea, cephalopods, demersal, and small pelagics--marketing the latter throughout West Africa.



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French, Portuguese, and Italian vessels also operate in the region. At least 10 percent of the French national catch comes from West African waters. French vessels--generally private companies working within the framework of EEC agreements--operate primarily out of Abidjan and Dakar harvesting relatively high value tuna, demersals and lobsters. The Portuguese are working to develop and expand their interests. Current efforts are concentrated among former Portuguese colonies, Cape Verde and Bissau, as well as in other Northern coastal countries. Italian catches in the region have fluctuated, but have generally been less than most other non-African actors. Italian vessels are normally based in Senegal and Togo.



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### East Asian

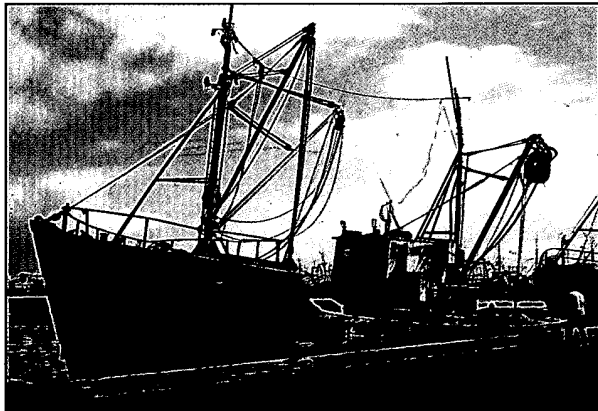
The South Koreans and the Japanese have been the primary East Asians involved in regional fisheries, but the Chinese, using Las Palmas as a base, are also beginning to fish in the region. South Korean fishing vessels operate out of bases in the Canaries and harvest cephalopods, demersals, and tuna. The ROK provides training, technical aid, and assistance in establishment of joint ventures. Japan has been a major source of bilateral aid for West African marine fisheries; recent assistance includes a total of almost \$3,000,000 in grants in aid to Togo and Ghana, and the gift of a research vessel and loan of a training team to Nigeria. Japanese vessels have been relatively inactive for the past few years, but in late 1985 Japan signed a one year agreement with Morocco allowing them to harvest tuna in Moroccan waters. According to US Embassy Bissau, PRC and Guinea Bissau signed a fishing agreement early 1985. Chinese vessels are also reportedly fishing in Senegalese, Guinean and Sierra Leonean waters.



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1. Part of Senegal's aging industrial fishing fleet



2. Modern Soviet factory trawler, Dakar



3. Spanish tuna boats in fishing port, Dakar



4. Building traditional fishing boats, Banjul

[Redacted]


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### Economic and Nutritional Significance for West Africa

Despite the underdevelopment of their fishing industries, marine fish and fish products play a significant role in the trade balances of several West African states. In 1983, the latest year for which we have complete statistics, \$1.4 billion worth of fish were caught in the waters off West Africa. Fish are particularly important to the economies of the northern coastal states such as Senegal, Cape Verde, and Guinea-Bissau where they are the principal source of foreign exchange; in Mauritania fish are projected to exceed iron ore as the primary foreign exchange earner in 1986, and in Morocco they comprise a major item of trade and source of employment--generating \$190 million in revenues in 1983. Elsewhere, for Guinea and Sierra Leone, fishery experts estimate the foreign exchange value--as yet unrealized--for the resource at \$60 million and \$42 million respectively. Principal exporters of marine fish products are Morocco, Spain's Canary Islands, Senegal, Ivory Coast, and Ghana. 


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Foreign exchange earnings based on fisheries are obtained through licensing fees and other remunerations from foreign fleets as well as from export of fish and fish products, but the full benefit of these arrangements are seldom realized. Coastal states frequently lack the ability or the political will to properly establish and enforce fishing agreements. For example, Defense attache reports suggest that the Senegalese may be overlooking instances of illegal fishing by the Soviets in their waters because the Soviets are the biggest customers for the financially troubled marine repair facility in Dakar. Furthermore, fee collection is frequently based on reporting by those who are fishing the waters; fishing agreements and protocols also often contain conditions which favor the foreign vessels. For instance, US Embassy Conakry reports that Soviet vessels fishing in Guinea waters pay annual license fees (based on a flat percentage of ship tonnage) of about US \$800,000 dollars. If they were forced to pay on the basis of actual catch, estimated revenues would be in the range of \$4 million. 

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According to a Fishery Committee for the East Central Atlantic (CECAF) report, intra-regional trade in fish accounts for only 15 percent of the region's import requirements. France, other West European countries and the USSR are major suppliers. The drain on limited foreign exchange is sizeable, especially for large importers like Nigeria or economically strapped countries such as Sierra Leone and Togo. Insufficient local supplies occur primarily in the south with its less prolific resource base, but shortages also occur in the north where local fleets cannot meet domestic needs and foreign fleets licensed to fish in territorial waters land insufficient quantities of low cost fish for sale to locals. The major consuming countries are Nigeria, Ghana, Senegal, the Ivory Coast, and Togo. The market for fish is also strong in the Congo, Cameroon, and Gabon. 

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Fish have been a major source of protein in the region, and rapid increases in population and recurrent droughts in traditional grazing areas have added to their importance. FAO estimates about one-half the animal protein consumed in most coastal states is in the form of fish and fish products. The concentration of the region's burgeoning population along the coast gives added significance to this resource. According to a recent study by CECAF, the average regional production of fish per capita in 1980 was only 40 percent of average regional consumption. The region accounts for about 20 percent of the world trade in canned mackerel and sardine (pelagics). 

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African coastal states could decrease imports of fish, conserve foreign exchange, and create new employment opportunities if policies limiting foreign fishing and encouraging local traditional or industrial fishermen were instituted. According to U.S. fishery experts (Sutinen and Pollnac) an increase in the exploitation of coastal pelagics by locals could result in a significant increase in protein food supplies for the region, if processing facilities and trade and marketing policies are also made available. [REDACTED]

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The fishing industry in West Africa is estimated to employ over 600,000 traditional and 15,000 industrial fisherman. Additional personnel are employed in marketing, processing, and distribution. An expansion of the African industrial fleets would not open up a large number of jobs in the fishing sector, however, a reduction in traditional fishing operations would affect not only fishermen but also those who depend on processing, distribution, and marketing for their livelihood. Morocco, with the most developed fishery sector in the region has 70,000 employed in the industry. [REDACTED]

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#### **Status of Management and Development Efforts**

Poor management and heavy exploitation threaten the future of the region's marine fisheries. Coastal countries are unable to effectively patrol their offshore waters, enforce existing laws, or maintain the technical and administrative structures needed to support appropriate policies. Not only are stocks of some of the principal commercial species over-exploited, but post-harvest losses are generally high, and the handling, processing, and marketing of traditional fishery products remain major constraints to expansion of the industry. [REDACTED]

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The growth of national management capabilities has been hampered by high costs, manpower deficiencies, and inadequate development of institutional structures and enforcement capabilities. Lack of political will to deprive influential nationals of benefits they derive from the current inequitable arrangements has also been a key constraint. In Sierra Leone, for example, the managing director of the Sierra Leone Fishing Company is generally believed to be responsible for much of the corruption in the country's fishing industry, and in Mauritania, the office of Minister of Fisheries has been considered a training ground for corruption, according to US Embassy reports. [REDACTED]

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Naval and coastal guard units are generally small and poorly funded. [SEE TABLE] Their efforts are hampered by inadequate equipment, a lack of trained personnel, spare parts, and air surveillance capabilities. Lengthy coastlines and extensive continental shelf areas exacerbate their problems. For instance, the small Mauritanian navy--one of the regions better equipped units--is tasked with policing a 754 kilometer coastline from a base in the northern part of the country; operations of the eight patrol boats and two Piper-Cheyenne aircraft are limited by fuel and spare part shortages, and there are periods when no vessels are on patrol. [REDACTED]

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Policing efforts are often directed at limiting illegal fishing by foreign vessels rather than at full enforcement. Even these attempts are sometimes frustrated by corruption and the ability of foreign fleets--especially the Soviet--to track patrol boat movements. High seas inspections of vessels are infrequent--especially for those fish-

[REDACTED]

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## COASTAL PATROL CAPABILITIES

COUNTRY	LENGTH COASTLINE KM <sup>2</sup>	EXTENT CONTINENTAL SHELF KM <sup>2</sup>	ENFORCEMENT UNIT	FISHERY PATROL CAPABILITIES (JANUARY 1986) NUMBER OF OPERATIONAL PATROL CRAFT	CHRONIC PROBLEMS				
					POOR MAINTENANCE	LACK OF FUEL	SHORTAGE OF SPARE PARTS	INADEQUATE OR INSUFFICIENT TRAINING	LACK AIR SURVEILLANCE CAPABILITIES
MOROCCO	2,300	75,000	Navy	17	X			X	X
MAURITANIA	754	32,500	Navy	8		X	X	X	
SENEGAL	500	30,000	Navy	9		X	X		
GAMBIA	80	5,200	Harbor Patrol	2	X	X	X	X	X
CAPE VERDE	1,000	10,200 3,500	Navy	1	X	X	X	X	
GUINEA- BISSAU	350	52,500	Navy	6	X	X	X	X	X
GUINEA	320	39,500	Navy	4	X	X	X	X	X
SIERRA LEONE	300	29,900	Navy	0	X	X	X	X	X
LIBERIA	560	17,400	Coast Guard	2	X	X	X		X
IVORY COAST	600	11,600	Navy	6	X	X	X	X	X
GHANA	550	21,700	Navy	3	X	X	X	X	X
TOGO	70	1,700	Navy	2					
BENIN	100	2,600	Navy	0	X	X	X	X	X
NIGERIA	860	32,300	Navy	37*	X		X	X	
CAMEROON	450	25,000	Navy	4	X		X		X
EQ. GUINEA	200	50,763	Navy	0	X	X	X	X	X
GABON	800	39,000	Navy	4					
CONGO	180	16,000	Navy	9	X	X	X	X	X
ZAIRE	40	1,029	Navy	4	X	X	X	X	X
SAO TOME/ PRINCIPE	135	43,903	Navy	2	X	X	X	X	X

\* A large number of these craft are probably not operational



5. *The damaged Siaka Stevens, Sierra Leone's only patrol vessel*

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ing under joint venture or bilateral agreements. Coastal states from Sierra Leone to Morocco with rich fishery resources are especially vulnerable to overfishing abuses by foreign fleets. But even states to the south with less productive waters often suffer because they lack the means to prevent abuses. A number of the littoral states, including Mauritania, Sierra Leone, Senegal, and Guinea have requested US assistance in improving their management capabilities. [Redacted]

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The absence of a strong legal framework also gives rise to management problems. The establishment of legislation to delimit fishing zones and territorial waters is still incomplete as is that regulating catch rates, weight and size limits, and type of gear. Conflicting claims over jurisdiction of offshore waters such as those off Western Sahara and those in the Guinea-Bissau/Senegal boundary zone fuel disputes and inhibit activities. [Redacted]

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Because of the difficulty of mobilizing fishery expertise and financial resources at the national level, most basic fishery management functions have been carried out under the direction of CEEFAC, a FAO/UNDP funded organization. CEEFAC facilitates communication between member states and supplies technical expertise. The stock assessments, catch statistics collecting and training activities carried out under its direction are essential to the formation of good management policies. [Redacted]

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The involvement of ECOWAS (Economic Community of West African States) in development of the fishery sector has been minimal, despite the concentration of prime fishing grounds and large markets in its region. The activities of the francophone West African Economic Community (CEAO) in the sector has also been limited. [Redacted]

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### AFRICAN FOOD DEFICITS

A recent report on global hunger concluded that at present most acute malnutrition is concentrated in Africa; yet the waters off Africa containing rich concentrations of marine resources are being fished to supply the needs of those in the developed world. There is an irony in the fact that this locally abundant source of complete protein is in danger of being lost to Africans. Most nations in West and Central Africa must rely heavily on food aid and imports to provide their populations with minimum dietary requirements; available statistics on infant mortality and on calorie consumption levels, however, suggest that despite imports large numbers remain chronically underfed. Protein consumption averages about 50 grams per day--only half that of the Soviet Union and other developed countries. Fish has been an important source of protein in West Africa--especially for the poor--but local supplies are inadequate and governments often expend scarce foreign exchange to import fish. Recurrent drought and animal diseases such as rinderpest have reduced the availability of other local sources of animal protein. [Redacted]

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[Redacted]

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### Prospects for Development

Recent technical studies indicate that future growth of the local fishing industry and continued viability of the marine fishery resource will depend on the ability of African states to reduce pressures on marine stocks--especially on coastal pelagics and cephalopods. The key to relieving these pressures is improvement in management and enforcement capabilities. In addition, regional cooperation will continue to be necessary to ensure intra-regional dialogue and the availability of the stock assessments, statistics, and basic training activities critical to implementation of realistic management policies. If the ability to manage and enforce this resource can be improved, the expansion of the local fishing industry can proceed without threatening stocks. To attract private investment for the expansion, governments will need to establish favorable policies.

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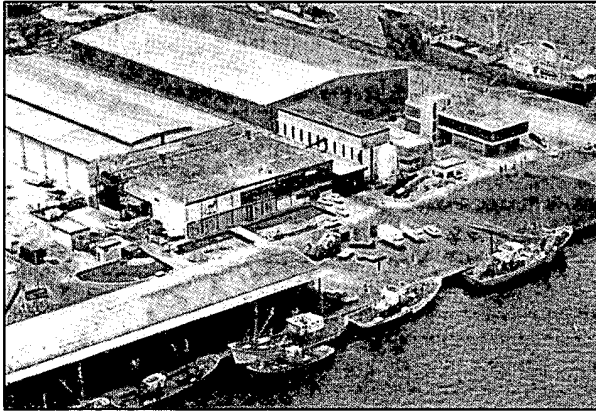
Efforts to develop the marine fisheries of West Africa face enormous obstacles, but we believe that prospects for gain are more favorable now than at any time in the past. The growing awareness that past arrangements have done little to improve the local capabilities and that foreigners, especially the Soviets, continue to reap the benefits of the rich offshore waters have prompted a number of countries to seek Western assistance to strengthen safeguards for their resources. In the current environment, we believe Western efforts to assist West Africans in developing their management capabilities and to encourage private investment will help reduce Soviet and other foreign presence in the sector.

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Despite the improved climate, however, it is unlikely that development will be either rapid or sustained. The political will to make changes is often lacking. This is especially true in countries which rely on existing agreements for their supply of fish for urban areas or for foreign exchange earnings, or where important nationals are benefiting from current arrangements. In other instances, the importance of bilateral military and economic agreements with countries whose vessels fish their waters may override concerns over the loss of fishery resources. The record of state run industry in West Africa has not been good. Private development of the industrial fleet would probably be most effective, but to date there has been insufficient private foreign investment attracted to the industry. In our judgment, assistance to this sector is likely to be required in a wide variety of ways and over a long period of time.

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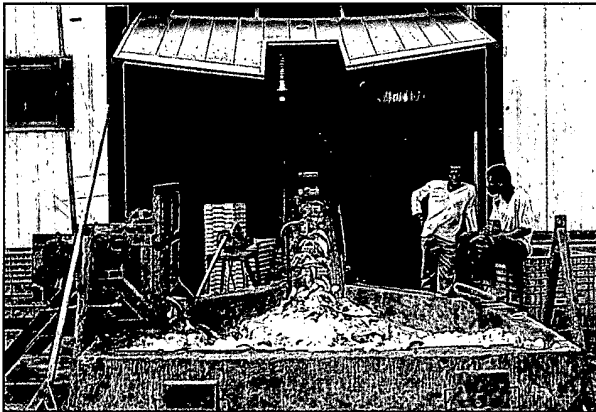
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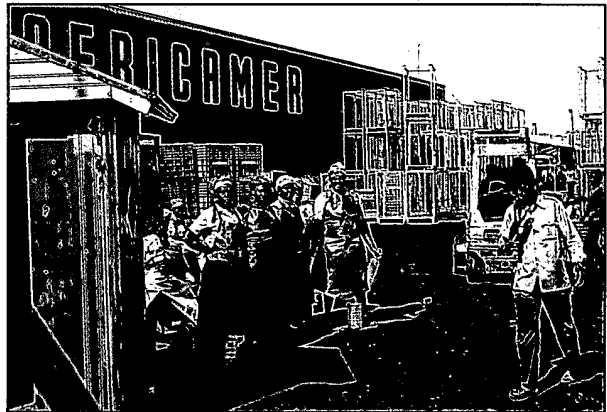
6. Fishing port and cold storage plant, Abidjan



7. Fishing port, Dakar



8. Frozen fish packing plant, Dakar



9. Laborers at fish processing plant, Dakar

[Redacted]

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*10. Repairing nets, Dakar*

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