



**UNIVERSITY of the
WESTERN CAPE**

**TRADE OF FISH IMPORTED FROM SUB-SAHARAN AFRICA IN THE
CAPE TOWN BUSINESS DISTRICT**

A thesis submitted in fulfilment of the requirements for the degree of
Master of Philosophy (Land and Agrarian Studies)

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ABSTRACT

Fish remains a vital source of food, income, nutrition and livelihoods for millions of people in Africa. This study investigated the modalities of trading in fish imported from sub-Saharan Africa into South Africa in the Cape Town Metropolitan area. The research analyses the opportunities and constraints faced by retail fish traders and importers regarding the South African and Southern African Development Community (SADC) policies that are in place, to ascertain how far the policies go in facilitating the intra-regional fish trade. In addition, the study analyses consumer factors underlying the attractiveness of imported fish, the channels used for importation as well as the types and forms of fish imported into South Africa. The study employs a qualitative approach using semi-structured interviews with purposively selected key informant retailers, traders and City of Cape Town officials to collect the information. Findings show that shop owners and traders face challenges in relation to obtaining the required documents for trading, sanitary and phytosanitary certification and tariff and non-tariff barriers at borders. Some of these challenges include long and tedious procedures to acquire documents, as well as the limitations placed on the amount of goods traders can import. Consumers (mostly from the diaspora) prefer the taste of fish that they are used to, thereby creating an increasing demand for imported fish. National and regional policies put in place do not facilitate the trade in fish as well as current municipal regulations for retailing imported fish and other food types. The study also raises critical questions about the implementation of sanitary and phytosanitary standards by officials in the food shops. The thesis concludes that it is critical for national and regional policies to be coordinated and harmonised for enhanced intra-regional fish trade, which could contribute towards increased food security, nutrition and livelihoods.

KEY WORDS

Regional integration

Intra-regional trade

Fish trade

Food and nutrition security

Policy reforms

Standards and regulations

Livelihoods

Shop owners

Wholesalers

Traders

Consumers




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DECLARATION

I declare that *Trade of fish imported from Sub-Saharan Africa into the Cape Town Metropolitan Area* is my own work that has not been submitted for any degree or examination at any other university, and that all the sources I have used and quoted have been indicated and acknowledged by complete references.

Emilienne Ewee Ndofofor Epo
(Student Number: 3506877)

Signature




.....

Date

08/06/2018
.....

Prof Mafaniso Hara
(Supervisor)

Signature



.....

Date

08/06/2018
.....

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DEDICATION

This thesis is dedicated to the memory of late Mama Anne Mbong Epo. You may have departed physically, but your spirit lives in me. To my God children Emile and Jael, I love you.

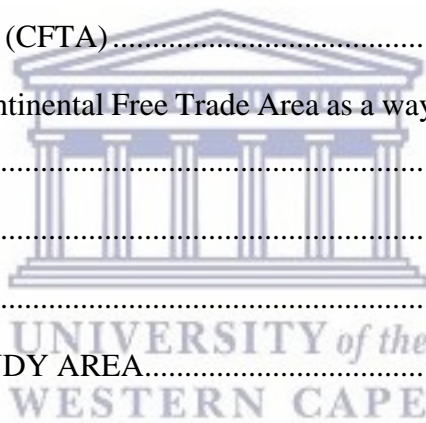


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ACRONYMS AND ABBREVIATIONS

AEC	:	African Economic Community
AU	:	African Union
AUC	:	African Union Commission
AU-IBAR	:	African Union – Inter-African Bureau for Animal Resources
CASIDRA	:	Cape Agency for Sustainable Integrated Development in Rural Areas
CFTA	:	Continental Free Trade Agreement
CFTA-NF	:	Continental Free Trade Area Negotiating Forum
CMT	:	Committee of Ministers
COMESA	:	Common Market for Eastern and Southern Africa
DAFF	:	Department of Agriculture, Forestry and Fisheries
DOH	:	Department of Health
DRC	:	Democratic Republic of Congo
DTI	:	Department of Trade and Industry
EAC	:	East African Community
ECCAS	:	Economic Community of Central African States
ECOWAS	:	Economic Community of West African States
EPA	:	Economic Partnership Agreements
EU	:	European Union
FAO	:	Food and Agriculture Organization (of the United Nations)
FTA	:	Free Trade Area
ICBT	:	Informal Cross Border Trade
IOC	:	Indian Ocean Commission
NEPAD	:	New Partnership for Africa’s Development
NRCS	:	National Regulator for Compulsory Specifications
NTBs	:	Non-Tariff Barriers
RTAs	:	Regional Trade Agreements
RECs	:	Regional Economic Communities
SDGs	:	Sustainable Development Goals
SPS	:	Sanitary and Phytosanitary
TFTA	:	Tripartite Free Trade Area
TRs	:	Trade Remedies
UNCTAD	:	United Nations Conference on Trade and Development

UNDP	:	United Nations Development Program
UNECA	:	United Nations Commission on Africa
WFP	:	World Food Program
WHO	:	World Health Organisation
WTO	:	World Trade Organisation
WWF	:	World Wide Fund for Nature



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1 CHAPTER ONE

INTRODUCTION

1.1 Background and context

Fisheries and aquaculture remain important sources of food, nutrition, income and livelihoods for hundreds of millions of people around the world. According to an FAO (2016) report, world per capita fish supply reached a new record high of 20 kg in 2014. This is as a result of a slight improvement in the state of certain fish stocks, a vigorous growth in aquaculture and also due to improved fisheries management. Aquaculture now provides half of all fish for human consumption and fish continues to be one of the most-traded food commodities worldwide with more than half of fish exports by value originating from developing countries (FAO, 2016). Recent reports by international organisations, high level experts as well as industry and civil society representatives all lay emphasis on the tremendous potential of the oceans and inland waters now, and even more so in the future, to contribute significantly to food security and adequate nutrition for a global population expected to reach 9.7 billion by 2050 (FAO, 2016).

The second International Conference on Nutrition held in Rome, in November 2014 brought together world leaders who adopted the Rome declaration and framework of action as well as renewed their commitment to establish and implement policies aimed at eradicating malnutrition and transforming food systems, thereby making nutritious diets available to all (FAO, 2016). The conference further confirmed the importance of fish and seafood as a source of nutrition and health for many coastal communities that depend on fish for their proteins and essential micronutrients. Emphasis was placed on the importance of these micronutrients on women of child-bearing age and young children. Several of the newly adopted sustainable development goals (SDGs) (FAO, 2016) are directly relevant to fisheries and aquaculture; they also stress the importance of the sustainable development of the fish sector particularly goal 14 which states that:

“Conserve and sustainably use the oceans, seas and marine resources for sustainable development” (FAO, 2016).

According to the FAO (2016) report, countries are now establishing an enabling environment for policies, institutions and governance to achieve the global transition to sustainable

development. These will be grounded in a sound evidence-based approach that takes into account the three dimensions of sustainability namely economic, social and environmental. FAO will play a frontline role in monitoring and reporting on specific targets relevant to FAO's mandate under SDGs 2 and 14, which emphasise ending hunger through achieving food security and improved nutrition and promoting sustainable agriculture.

1.2 Fish trade

The trade of fish across borders or frontiers is an old profession in Africa, which was done to facilitate access to fish for distant communities, mainly in smoked and sun dried/salted form (IOC, 2012). Fish trade in Southern Africa has increased to cover countries within and outside the Southern African Development Community (SADC) region, providing the population with access to fish preserved and processed through artisanal and industrial methods. The market outlets have also grown from the solitary fishmonger to specialised agents, specialised fish shops, restaurants, hotels, supermarkets and retail stores. In addition, the range of products has also expanded to include frozen, chilled and canned fishery products in addition to salted, sun dried, fresh smoked and deep-fried products, etc. (IOC, 2012).

Despite the potential of fish trade to address food insecurity and poverty, it has often been neglected and disregarded in national and regional policies (Worldfish,2015). Major interventions and initiatives have been made to promote the development of fisheries in Africa, yet the continent still faces numerous challenges in enhancing intra-regional fish trade for food security, poverty alleviation and sustainable economic growth. Fish trade on the continent is hindered by the complex nature of policies governing intra-regional trade as well as inadequate infrastructure and a lack of marketing and business skills (Worldfish, 2015). In addition, the lack of data on the contribution of fish to national development in national and regional policy contexts across the continent is a major concern, as most of the fish trade is carried out informally by small-scale traders. Informal fish trade contributes a great deal to employment, poverty reduction and food security; hence, there is a need for its integration into regional and national policies. By so doing, a clearer understanding of the full contribution and specific role that the fish trade can play towards regional and national development will be possible.

South Africa has a growing number of people from other regions of Africa especially West Africa, East Africa, Central and Southern Africa who have settled in South Africa for reasons of seeking war- or political refuge, or business and job opportunities. According to the 2011-

2016 census data, there were 248,357 African immigrants in the Western Cape (Kaiser EDP, 2015) which did not include undocumented immigrants as they could not be accounted for in the census. However, the Department of Home Affairs estimates that the undocumented immigrant population in South Africa as a whole varies between 0.5M to 10M (CASIDRA: Final Report, 2015). These foreign nationals are increasingly turning towards business as a means of livelihood; for example, the opening of shops that specialise in food items to meet the demands of the immigrant population. Among such food items is fish, which is imported from countries in different forms such as dried, smoked, chilled or fresh. Some of these shop owners also sell local fish (South African) and fish imported from outside Africa. However, the focus of this study is on specialised shops that import and sell fish and fish products from other African countries in the Cape Town Metropolitan area.

1.3 Rationale and significance of the study

Sub-Saharan Africa is one of the two regions in the world that suffers from high rates of hunger and poverty. According to the “State of Food Insecurity in the World” (FAO, 2010), 239 million of the 925 million hungry people in the world in 2010, were located in sub-Saharan Africa. The region is plagued by chronic hunger and malnutrition, which are rising in absolute and relative terms. As such, access to adequate nutritious food is a challenge to large populations. There have been growing efforts to increase the production and access of staple cereals in the region. However, there is limited attention given to the enhancement of and access to fish and fish products to the more than 400 million people on the continent who depend on fish as a vital source of nutrition (WorldFish, 2013). Hence, the African Union’s New Partnership for Africa’s Development (NEPAD) Agency has prioritised the strengthening of regional trade and has identified fish and fish products as key commodities for investment and policy support (WorldFish, 2013).

Even though intra-regional fish trade contributes greatly in addressing the region’s food and nutrition insecurity, as well as poverty reduction through wealth creation, this type of trade is often overlooked and neglected in national and regional policy. As a result, intra-regional fish trade has largely remained informal, with low volumes traded by artisanal and small-medium enterprises, most of which are headed by women (WorldFish, 2013). Data gaps on the contribution of fish trade to the economic, social and cultural context of African states pose a major problem. As a result, fisheries are not perceived as a priority for economic development (WorldFish, 2015). To add to that, small scale traders have not been adequately engaged in

policy processes despite their vital role in the fish trade. The perception of regarding fish trade as an insignificant means of livelihood needs to be reversed so that people in the fish trade can be understood not only as contributors to the development process, but also as stakeholders to be engaged in policy processes (WorldFish, 2015). Not many studies have been carried out regarding the constraints and opportunities that come with regional fish trade as well as the attitude of fish traders. Therefore, there is a need for improved engagement with small-scale traders as the basis for evidence-based policy formulation. This study aims to understand and unpack the modalities of fish trade in the Southern African corridor as a sub-unit of the fish trade project, by looking at shops specialising in food for people from the diaspora living in Cape Town.

1.4 Research objectives

The overall objective of this study is firstly to investigate the modalities of trading in fish imported from other African countries into South Africa using the Cape Town Metropolitan area as the study area. Existing policies were analysed to determine how far they go in facilitating trade in imported fish into South Africa, and regional fish trade in the Southern African corridor. Based on these findings, this research provides recommendations to South Africa and regional economic communities for possible policy reforms for enhancing regional fish trade. The specific objectives of this research included:

- To investigate the types and forms of fish imported into South Africa for sale in the specialised shops.
- To determine the channels (both formal and informal) used for the importation of fish and fish products into South Africa.
- To investigate consumer factors underlying the attractiveness of imported fish.
- To assess the documentation required to import and to trade in fish and fish products locally.
- To analyse national and regional policies that are meant to facilitate regional fish trade and determine whether or not these play a facilitatory or constraining role.

1.5 Research questions

Not many studies have been done regarding the constraints and opportunities faced by shop owners/fish traders. These constraints range from obtaining phytosanitary certificates to baggage restrictions and permits needed to import fish into South Africa. Therefore the key

research question was: What constraints and opportunities do shop owners and fish traders face in importing fish into South Africa and selling it locally?

In order to answer the key research question, the following questions were asked:

- What official documents/permits are required to import fish into South Africa and trade locally?
- What means of transportation and routes are used to import fish into South Africa?
- What types of costs are incurred and what forms of revenue are obtained by fish traders?
- Why do consumers prefer imported fish compared to local (South African) fish and other forms of protein?
- What national policies and legislation apply to the importing and selling of fish locally in South Africa?
- What regional/sub-regional policies have been put in place to facilitate the fish trade in the Southern African corridor?
- What policy improvements can be made to improve the trade of imported fish and fish products from other African countries in the Southern African corridor?

Many scholarly reviews on intra-regional trade in sub-Saharan Africa have revealed that there are quite a number of policies targeted at boosting this type of trade that exists on the continent (WorldFish, 2013). Yet, the effective implementation and monitoring of the policy impacts on intra-regional trade is hindered by the persistent absence of common approaches to implementation and monitoring (WorldFish, 2013). This study analyses these national and regional policies to determine if they are working against or in the interest of intra-regional trade.

1.6 Outline of the thesis

This thesis is structured into six chapters, including this introductory chapter. Chapter Two, which is the literature survey, discusses regional integration as a theoretical framework used for the study. The chapter further provides insights on regional trade as a whole, as well as intra-regional fish trade and its effects on livelihoods in Africa. Chapter Two also looks at regional economic communities and agreements that have been put in place. An understanding of aspects of the integration process in the European Union (EU) is also reviewed *vis-a-vis* integration in the SADC region. Chapter Three describes the methodology of the study, which

outlines the methods and approaches used for this study. This chapter also discusses the data sources and types of research instruments used for the study and describes how data was collected and analysed with regards to the research questions and objectives. The study area, which is the Cape Town Metropolitan area, is introduced as well. The first three chapters help to frame the results presented in Chapter Four, which explores the different themes drawn from data collection such as the consumer base, the different fish species and forms and packaging and display of fish. Chapter Five is the discussion chapter, which draws insights from the results outlined in chapter four. This chapter interprets findings and answers the research questions based on important themes that emerge from the results. Chapter Six provides conclusions drawn from the discussions and proposes recommendations for possible policy reforms on regional fish trade in the Southern Africa region and Africa as a whole.



2 CHAPTER TWO

TRADE AND REGIONAL INTEGRATION

2.1 Introduction

Trade is widely accepted as being fundamental for economic growth and development. Although there are many countries and economies globally that have been able to lift their people from poverty through trade, the African continent has not been able to utilise trade as a means to achieve rapid and sustainable economic development (AU, 2015a; 2015b). According to an African Union (AU) report on “Boosting Intra-African trade” (2015a), the continent lags behind due to constraints in three main features, namely the structure, size and direction of trade. The United Nations Economic Commission on Africa (UNECA) argues that Africa’s stunted economic growth and development is mostly attributable to the lack of a large economic space that can spur and sustain economies of scale, which is a crucial condition for genuine economic development (UNECA, 2013).

A review of relevant literature was undertaken focusing on scholars who have written extensively on concepts and issues of regional integration, economic integration in terms of trade policies, agreements and regulations. Regional integration was used as a theoretical framework to provide insights into regional trade as a whole as well as intra-regional fish trade and its effects on livelihoods in Africa. Regional integration in the European Union (EU) was reviewed *vis-a-vis* integration modalities in Africa and the lessons that could be drawn from the EU integration process. This chapter further discusses efforts made so far in the integration process, assessing the challenges faced by African countries in this process. It contemplates a way forward to deeper and more effective integration among African states.

2.2 Regional integration

Regional integration involves two or more country’s coming together to agree to co-operate and work together towards achieving peace, security and wealth (McCormick, 1999). It may be in the form of trade agreements whereby countries come together and sign treaties to form institutions at the regional level, for regional cooperation and to carry out mutual projects. Regional integration is seen as a rational response to the difficulties faced by Africa, a continent characterised by landlocked countries and small national markets. According to the World Trade Organisation (2011), since independence, African governments have embraced regional integration as an important part of their development strategies. Hence, many African

governments have taken strides in concluding a number of regional integration agreements, many of which have membership overlaps (WTO, 2011). Efforts at regional integration in the form of trade agreements in Africa and other parts of the world tend to focus on removing barriers to allow the free flow of goods and services across national and international borders. These trade agreements are being used to boost the potential of regional blocs to redress the hindrances of low and limited production of small fragmented markets (Ngenyeh, 2009). According to the World Trade Organisation (WTO), regional trade agreements have increasingly flourished all over the world since the early 1990s, so much so that nearly all WTO members are now signatory to more than one bilateral, multilateral or regional arrangement (Ngenyeh, 2009). What all regional trade agreements in the WTO have in common is that they are reciprocal trade agreements between two or more entities. According to a Brookings Institute Report (2016), increased regional integration in Africa has potential in terms of increasing inter-African trade and building an African consumer base, as well as networking African interdependence, which has great long-term promise.

The ambitious schemes and unrealistic time frames set by regional integration agreements mean that few success stories have been recorded. According to WTO (2011), the complex nature of the regional integration process in Africa is because of various negotiating groups on the continent, which cuts across existing neighbouring regional integration arrangements, hence the challenges of regional integration in Africa. He goes further to state that the African paradigm is that of linear market integration where there is a stepwise integration of goods, labour, capital markets and eventually a monetary and fiscal integration. The African Union Commission's Strategic Plan for 2014-2017 clearly states that the starting point for the integration process will be a "free trade area followed by a customs union, a common market, and then the integration of monetary and fiscal matters to establish an economic union" (AUC, 2013:26). Although WTO (2011) generally agrees in his paper that regional integration is good and makes sense for Africa, a continent characterized by small countries, small economies and small markets, he questions whether the linear model, which currently defines the African integration paradigm, makes sense for the continent.

Different views have emerged as to the advantages and challenges of regional integration in Africa over the last decade. Rettig et al (2013) argue that regional integration could play a key role in unleashing the continent's growth potential. There would be benefits such as increased

intra-RECs and Africa-wide trade, lower poverty levels, improved self-sufficiency in meeting the continent's import demands and a more peaceful interdependent existence (Rettig et al, 2013). Regional integration can help Africa build regional value chains thereby tapping into global value chains (Ko, 2013). Ko (2013) further states that gains from regional integration in Africa could be particularly substantial as the continent is characterised by countries with small populations, a third of which are landlocked, making it the most fragmented continent in the world. On the other hand, UNCTAD (2007) argues that a majority of sub-Saharan African countries are small and least developed hence the continent's declining share in global production and trade; as well as Africa's continuous engagement at the periphery of the global economy. Ko (2013) adds that despite all efforts to create integration zones, the continent continues to register the lowest percentage of trade within the continent and worldwide. In addition, a mix of trade policies that focus mainly on doing trade with and gaining access to developed communities and regional integration efforts that were not fully implemented, also contribute to the low percentage of trade (Ko, 2013). Much remains to be done for Africa to fully reap the benefits of regional integration on the continent.

The process of integration has remained slow despite countless efforts by the African Union to create working committees to coordinate regional blocs (Rettig et al, 2013). As a result, various reasons have been suggested as constraints to the progress of regional integration in Africa. Geda and Kebret (2007), discuss these reasons in their article on "regional economic integration in Africa", chief amongst these being the reluctance of governments to surrender their sovereignty of macroeconomic policy-making to a regional authority. Other reasons include most governments' unwillingness to face potential consumption costs that may come as a result of importing from a high-cost member country; their inability to discontinue economic ties with non-members and the unwillingness of governments to accept the distribution of losses and gains that may follow integration agreements, at least in the short run (Geda and Kebret, 2007). The authors add that, macroeconomic instability and the lack of a strong and sustained political commitment have greatly hindered the progress of integration in Africa. This view is supported by Ko (2013) who argues that in terms of infrastructure, the continent is widely lagging behind. Information and Communications Technology (ICT) infrastructure still needs to be scaled up as well and further developments need to be made in the financial services sector. Inefficient border administration and lack of adequate infrastructure in communications technology are all hindrances to economic integration and trade in Africa. Hartzenberg (2011) also emphasised the high cost and unreliable nature of

transport services in Africa, as well as the fact that many air, road and rail networks remain unconnected. This contributes to a high cost business environment, which means cost-saving management systems cannot be used. The lack of capital and skills to establish and operate sophisticated communication systems, combined with small business communities that do not give room for business publications, means that the absence of news needed to make informed decisions is another major constraint (Hartzenberg, 2011).

2.3 Regional economic integration and Africa's trade performance

Regional economic integration is the merging of economies and the economic policies of two or more countries in a given region (Ngenyeh, 2009). According to a UNDP report (2011), economic integration signifies much more than eliminating barriers to trade in goods and services between countries. It also encompasses harmonising standards and regulatory frameworks, adopting common approaches to fiscal and monetary policies as well as reducing restrictions on financial capital and labour mobility. Africa has sought to achieve deeper economic integration dating back from the creation of the Southern Africa Customs Union (SACU) in 1910. Since then a number of regional economic communities (RECs) have been formed across the continent (Geda and Kebret, 2007). Regional economic communities are regional groupings of African states which aim to facilitate regional economic integration between members of the individual regions (AU, 2015a; 2015b). The creation of RECs was proposed at the 1980 Lagos Plan of Action for the development of Africa and the Abuja Treaty as a basis for wider African integration; and eventually continental integration. The process of economic integration is facilitated through regional economic blocs/communities, eight of which are recognised by the African Union as its pillars towards the creation of the African Economic Community (AEC) (AUC, 2013). The following are the eight RECs that are recognised by the AU:

- Southern African Development Community (SADC)
- Common Market for Eastern and Southern Africa (COMESA)
- East African Community (EAC)
- Economic Community of West African States (ECOWAS)
- Economic Community of Central African States (ECCAS)
- Intergovernmental Authority on Development (IGAD)
- Community of Sahel Saharan States (CENSAD)
- Arab Maghreb Union (UMA).

The factors that have resulted in Africa's and sub-Saharan Africa's relatively disappointing economic performance in the past few decades have been a subject of much enquiry. According to the economic commission for Africa (2010), regional economic communities and the agreements they signed have done little to promote intra-regional trade. The continent's reliance on very few export primary commodities, which represents more than 80% of Africa's total exports in recent years, has created severe constraints on growth due to the constant change in the price of commodities (ECA, 2010). Also, many African countries lack the infrastructure and industrial capacity to support trade and to diversify manufactured goods (Sindzingre, 2011).

Compared to its international counterparts, intra-African trade has remained consistently low. More than 80% of Africa's exports are still destined for outside markets like the European Union and the USA, which account for more than 50% of the total exports (ECA, 2010). Despite her resource endowments, Africa imports 90% of her goods from outside the continent hence only about 10-12% of African trade takes place amongst African nations (ECA, 2010). This can be partly attributed to the slow implementation of regional integration agreements designed to eliminate tariff and non-tariff barriers. Hartzenberg (2011), further purports that Africa lags behind other world regions in terms of competitiveness, and generally faces a constrained environment. He emphasises the need for reforms to improve the competitive nature of African trade. One important objective of regional integration agreements is to reduce the transaction costs of trade. Although tariffs are undeniably an important barrier, there is evidence suggesting that time consuming and inefficient border procedures as well as corruption in some cases may be more important in hindering intra-regional trade (World Bank, 2011). Burdensome custom procedures, excessive documentation and inefficient port operations all lead to additional costs and delays for exporters and importers, which ultimately hampers trade. The World Bank Report (2011) further states that easing trade regulations is increasingly important for business in a globalised world.

Hartzenberg (2011) further explores the issues regarding constraints to the growth of African economies by stating that hindrances to growth lie on the supply side of economic activity. The constraints related to improving the supply capacity include creating a business environment that will support the growth and development of domestic businesses, improving the quality of

governance and institutional capacity as well as investing in infrastructure and associated regulatory infrastructure (McCarthy, 2007). While the above may be possible, Hartzenberg (2011) argues that a deeper integration agenda can assist to address the national level supply-side constraints by pivoting domestic policy and regulatory reform processes. Low-income economies may come as a roadblock to this process because they often have weak policy and institutional capacity constraints to manage their domestic policy processes; hence a hindrance in the development of robust rules-based regional integration agreements.

Weak institutions, poorly defined mandates and vaguely ascribed powers, according to Hartzenberg (2011) are some attributes of African nations regarding regional integration agreements, intra-regional trade and economic growth. As mentioned earlier, monitoring of compliance by African countries and their governments is weak or non-existent. Compliance should be monitored and non-compliance addressed, which is usually not the case. Once legal arrangements have been put in place to pursue a common regional integration agenda, transparency, predictability and respect for the rules should follow.

Over the last two decades, Africa's share of world trade has declined, while global merchandise trade has tripled (WEF et al, 2011). Similar trends in decline have also been observed in Africa's international trade in services. Her services exports as a share of global services exports declined from 3.5% to 2.5% in 2010. However, According to the World Bank (2011), sub-Saharan Africa is one of the fastest growing regions economically in the world, even though growth appears to be fragile and based on distorted factors rather than sound economic fundamentals. Hence, Sindzingre (2011) argues that structural transformation coupled with industrialisation and a change in trade composition would be key factors in triggering sustainable growth paths in sub-Saharan Africa.

2.4 The SADC Protocol on Trade (1996)

The protocol highlights four main objectives. Firstly, to further liberalise intra-regional trade in goods and services on the basis of fair, mutually equitable and beneficial trade arrangements. Secondly, to ensure efficient production within the SADC reflecting the current and dynamic comparative advantages of its members. Thirdly, to contribute towards improving the climate for domestic, cross-border and foreign investment, and fourthly, to enhance the economic development, diversification and industrialisation of the region.

Article 3 focuses on the elimination of barriers to intra-SADC trade. It states that the process and method of eliminating barriers to intra-SADC trade, and the criteria of listing products for special consideration shall be negotiated in the context of the trade negotiating forum. Also, that member states which consider that they may be or have been adversely affected by the removal of tariffs and NTBs to trade, may upon application to the committee of ministers be granted a grace period to afford them additional time for the elimination of tariffs and NTBs. CMTs shall elaborate appropriate criteria for the consideration of such applications. The article further states that the process and modalities for eliminating barriers to intra-SADC trade shall, upon adoption, be deemed to form an integral part of this protocol. CMTs shall elaborate on appropriate criteria for the consideration of such applications.

Article 4 elaborates on the elimination of import duties. There shall be a phased reduction and eventual elimination of import duties in accordance with article 3 above, on goods originating from other member states. The process should be accompanied by an industrialisation strategy to improve competitiveness of member states. Pursuant to that, member states shall not raise import duties beyond those in existence at the time of entry into force of the protocol. Article 5 states that member states shall not apply any export duties on goods for export to other member states. However, members shall not be prevented from applying export duties necessary to prevent erosion of any prohibitions or restrictions which apply to exports outside the community, provided that no less favourable treatment is granted to goods from other member states. Member states shall, in relation to intra-SADC trade, adopt and implement measures to eliminate all existing forms of NTBs and refrain from imposing any new NTBs (Article 6).

Article 7 of the protocol addresses quantity restrictions, which is one of the key challenges highlighted by traders/shop owners in this study. It states that members shall not apply any quantitative restrictions on imports from other member states, except as otherwise provided for in this protocol. However, such measures may be taken as necessary to prevent erosion of any prohibitions which apply to imports from outside the community. Article 14 further highlights trade facilitation at length. It states that member states shall take such measures as are necessary to facilitate the simplification and harmonisation of trade documentation and procedures. This section also speaks to one of the many challenges highlighted by fish traders as a barrier to the import and trade of fish. In terms of transit trade, member states shall enjoy freedom of transit

within the community and shall only be subject to the payment of the normal rates for services rendered (Article 15).

Article 16 on sanitary and phytosanitary measures, emphasises the need for member states to base their measures on international standards, guidelines and recommendations. This is to harmonise sanitary and phytosanitary measures for agricultural and livestock production without reducing the level of safety. Member states must also ensure the protection of human, animal or plant life or consumer and environmental health without prejudice to the rights of any member state. Taking into account standardisation activities, member states shall to the greatest extent make compatible their respective standard-related measures, to facilitate trade in goods and services within the community. In addition, member states shall accept as equivalent technical regulations of other member states, even if these regulations differ from their own, provided that they adequately fulfil the objectives of their regulations. A member state shall also, upon request of another member state, seek through appropriate measures, to promote the compatibility of specific standards or conformity assessment procedures that are maintained in its territory as well as the territories of other member states.

Article 29 concurs with the objectives and research questions clearly stated in this study. It postulates that member states shall to their best endeavour coordinate their trade policies and negotiating positions in respect of relations with third countries or groups of third countries and international organisations. This is to facilitate and accelerate the achievement of the objectives of this protocol. Summarily, member states of the SADC have undertaken to progressively establish a development community within which customs duties and other charges of equivalent effect imposed on imports shall be gradually reduced and eventually eliminated. NTBs to trade among member states shall be removed and all trade documents and procedures shall be harmonised.

2.5 Regional trade agreements

The African Union Commission's Strategic Plan for 2014-2017 clearly states that for Africa to sustain its current economic growth performance, priority must be emphasised on speeding up the pace of regional integration in order to promote higher levels of trade (AUC, 2013). This kind of integration will boost diversification and sustainable growth and also create larger markets on the continent. Different initiatives have already been carried out to scale up cross-border trade (Tall, 2015). Regional economic communities' (RECs) promotion of regional

integration and intra-regional trade remain top priorities for the continent. Thus, the African Union's work is focused on eventually creating a Continental Free Trade Area (CFTA) (Tall, 2015). So far, considerable efforts have been made to promote intra-regional trade in sub-Saharan Africa through the AEC and RECs framework (Ansen, 2015). The AEC sub-regions in sub-Saharan Africa have been able to establish a number of free trade areas and customs unions. The ratification of the SADC Protocol on Trade in 2000 and the launch of a free trade area in 2008 marked the beginning of growing intra-regional trade in the region (WorldFish, 2013). A free trade area was declared in the ECOWAS region in 2000 building on their trade liberalization scheme (ETLS). Meanwhile, a customs and economic union was established by the Brazzaville Treaty for the Economic Commission for Central Africa States (ECCAS). The EAC protocol on the establishment of the East Africa Common Market was effected in 2010. It provides for the free movement of labour, capital, goods and services. The COMESA free trade area was launched in 2000; it promotes intra-regional trade and the establishment of a customs union and eventually a monetary union within the region (Ansen, 2015).

The problem of overlapping memberships is a common phenomenon on the continent whereby most countries are registered members of two or more regional trade agreements (Ngenyeh, 2009). This makes it more difficult for countries in these regional blocs to work towards achieving a common goal. The main regional groupings in Africa with overlapping memberships include ECOWAS, SADC, SACU, EAC, COMESA and the new TFTA (Ngenyeh, 2009). The REC's efforts with regards to trade facilitation could go a long way in boosting intra-African trade. However, despite the efforts and plans that have been put in place, intra-regional trade still remains very low and constitutes a hindrance and missed opportunity for growth, development and opportunity for the continent as a whole (AUC, 2013). The promotion of intra-regional trade constitutes an essential response to the challenges the continent is facing, and it will also contribute to enhancing Africa's capacity to effectively compete in the international market (Tall, 2015).

2.6 Fish trade, food and nutrition security

Fish is considered one of the most internationally traded foods. The latest evidence by FAO (2014) suggests that, in 2010, fish accounted for 17 percent of the global population's intake of animal protein and 6.5 percent of all protein consumed (HLPE, 2014). Naturally, feeding a growing global population puts pressure on natural resources. Therefore, to ensure meeting future food security demands, there must be governance put in place to manage these resources

and protect them from over-exploitation, while also meeting growing demand for nutritious foods (HLPE, 2014). The importance of fish and its contribution to food security is crucial in the diet of a population and countries in which the staple crop is low in protein e.g Cassava and Plantains (FAO, 2008). In such situations, as in the case in many parts of Africa, a larger proportion of foods rich in protein such as fish and fats may be essential especially in the diets of young growing children, infants and pregnant women (FAO, 2008).

Fish and fish trade are important sources of both direct and indirect food security (FAO, 2008). While evidence suggests that fish trade can have mixed impacts on livelihoods, food security and nutrition of local fishing communities (HLPE, 2014), some analysts point to the contributions export revenues from fish trade make to local communities. In addition, growth and employment effects of fisheries development can have indirect positive consequences on the food security and nutrition of the poor (HLPE, 2014). Concerns relating to fish trade and food security have tended to focus on the direct dimension of fish for consumption. Consequently, in examining fish exports, focus has primarily been on how they reduce availability of fish for domestic consumption (FAO, 2008). Other studies have shown that, although fish trade generates millions of dollars in revenue, it co-exists with miserable living conditions (HLPE, 2014) for the local communities who have either been displaced by industrial scale operators or excluded from the trade by stringent commercial regulations hence losing access to employment and a rich food source.

The relationship between fish trade and food security is more complex. Production for exports can enhance the income of poor fishers as well as their trade-based entitlements (FAO, 2008) to achieve greater food security. On the other hand, to export fish, further processing will be required and more often than not, it creates new employment and enhances labour-based entitlements especially among women. It has now been established that women's employment contributes more to family welfare and food security (FAO, 2008). In addition, imports for nutritional consumption can help stabilize or reduce fish prices which benefits consumers, as well as it can also have an adverse effect on the income of fishers in the importing country (FAO, 2008). It may lower the price of fish they receive and thus lessen the food security. As a response, local fish stock may be heavily exploited, imported fish may be meant for re-exporting after value-added processing hence the above-mentioned effect is generated. Meanwhile the consumer in the importing country is totally unaffected. This demonstrates that the paths towards enhanced food security will depend on more specific details.

There is evidence that suggests that developing countries governments do not always negotiate good agreements with foreign fishing operators for the resources extracted from their fisheries (HLPE, 2014). So far, national and international policies and interventions have provided strong support to international fish trade. Little attention has however been given to support regional and domestic fisheries trade, despite its potential to improve food security and nutrition especially for vulnerable groups. According to a High Level Panel of Experts report (2014) there is a large number of small scale informal producers and traders who are usually marginalized by the globalization of fish trade oriented to a small number of globally traded species. Meanwhile these small groups will be able to better engage with market opportunities created by domestic or regional trade, where there is a demand for a diverse set of local species that small scale fisheries can produce. Therefore, if more attention is placed devising interventions and research on regional and domestic trade in developing countries, more fish will be available locally – hence the reduction of growing tensions which cannot be solved alone by fish imports (HLPE, 2014).

From a national food security perspective, fish is often not considered important because it contributes few calories (FAO, 2008). Food security at a national level is often measured in terms of carbohydrate availability per head of population. However, since people do not live on carbohydrate sources alone such as grains and tubers, there exists a strong case for broadening the components considered in the measurement of food security (FAO, 2008). Nutritionally, fish has many advantages because it is not as scarce or as expensive as other sources of animal protein such as in the less developed areas of the world. Fish has not been given enough attention as a key element in food security and nutrition strategies at the national level and in wider development discussions and interventions (HLPE, 2014). Specialist fishery debates have neglected issues linked to their contribution to reducing hunger and malnutrition and to supporting livelihoods. According to FAO (2008) increased consumption of fish, and its addition to the diets of low-income populations (including pregnant and breastfeeding mothers and young children), offers important means for improving food security and nutrition for several reasons. Fish contains several amino acids essential for human health; especially lysine and methionine. Second, the lipid composition of fish is unique, having long-chain, polyunsaturated fatty acids (LC-PUFAs) with many potential beneficial effects for adult health and child development. In addition, the bioavailability of fish protein is approximately 5–15 percent higher than that from plant sources (HLPE, 2014).

Fish is an important source of indirect food security. This is achieved by generating livelihoods, employment and income from producing, processing, and marketing fish (FAO, 2008). These activities have great significance especially in developing countries. Most often, the sectors of the population that inhabit these regions have limited opportunities for employment. The harvesting of fishery resources and their processing and trade are often very important or sometimes the only option for earning a livelihood (FAO, 2008). Even so, there is firm evidence of such a relationship between easier access to fishery resources, higher incomes and increased well-being. The opportunities certainly exist and can be utilized by nations and communities provided the right economic and institutional arrangements are in place. However, there are several countries in the world where there is fish in abundance, yet they continue to have a large number of undernourished adults and children (FAO, 2008). This has been attributed to the important and often unrecognized fact that the consumption of protein foods is a matter of acquired taste and habit. Hence, it does not suffice that there is a need for food; it has to be backed by effective demand in the form of purchasing power, which is lacking among many potential consumers of fish in developing countries. Connecting unutilized fishery resources to food needs is often easier said than done.

2.7 Fish trade and the informality

Although fish and fish products are becoming increasingly important for most countries food security and nutrition, information on informal cross-border fish trade remains scanty. Informal fish trade just like all other informal economic activities has been neglected in national and regional policies leading to obscurity of such an important part of the fishery sector (Mussa, et al. 2017). Ayilu et al. (2016) support that it poses a problem for national, regional and international fisheries institutions because they are unable to express the role of fish in national economic development and its role on the welfare (general wellbeing and nutrition, improved incomes) on fish-dependent communities. Cognizant of this, AU member states have prioritized fish as a strategic food commodity for the continent and commitments have been made to triple commodity trade by 2025 (Ayilu, et al. 2016).

Fish has featured less in regional trade strategies compared to other food commodities such as crops and no mechanisms have been put in place to facilitate the free movement of fish products across borders (Ayilu, et al. 2016). As a result, fish traders, especially women, continue to face

challenges, including informal tariffs, when trying to move products across the borders. Mussa et al. (2017) adds that traders are put off by cross-border regulations that are restrictive, which agrees with the findings of this study as will be seen in the results chapter. Traders are required to pay a processing fee for a long list of required documents to trade across borders which most of them admit they cannot afford. Informal fish trade is often carried out by disadvantaged people, often women (Ayilu, et al. 2016) as a result it is underreported in many countries national accounting systems. This leads to the absence of strategies to enforce policies to facilitate free and quick movement of fish across borders. The livelihoods of those involved in the regional fish product value chain including processors, transporters and traders are also affected.

There is a great potential for fisheries and aquaculture to contribute to food and nutrition security as well as poverty reduction. However, policy makers and governments are limited are limited from realizing this potential by the following issues;

- Their lack of understanding about operations and dynamics of fish markets
- Lack of recognition of informal markets and trade by trade authorities
- The inadequate role of RECs in facilitating intra-regional fish trade (Ayilu, et al, 2016).

Governments and policy makers need to have a better understanding of the flow of fish trade to enable them in policy making that creates an enabling environment for fish trade at all nodes of the value chain.

2.8 Intra-regional fish trade

Fish trade is governed by complex multi-lateral and bi-lateral trade negotiations and agreements at national, regional and international levels (WorldFish, 2013). Consumer demand alongside trade agreements determine the quantity of fish imported and exported (WWF Report, 2014). The trade in fish and its products among African countries is becoming increasingly important to the region's food security and economic development, hence the strengthening of intra-regional trade has been prioritised by the AU and NEPAD. Fish and fish products have been identified as key commodities for policy and investment support (Ansen, 2015). However, despite its potential in addressing poverty and food insecurity in the region, trade in fish is still overlooked in national and regional policies. As a result intra-regional fish trade is mainly carried out informally and in small scales/volumes dominated by women (Ansen, 2015).

The overall fish trade programme focused on four main trade corridors in Southern, Western, Eastern and Central Africa. These trade corridors were selected by the AU based on official transport links targeted for spatial development and for the volumes of fish currently traded and where trade flows are being monitored. This study however, focuses on trade of fish in sub-Saharan Africa, specifically in the Southern African region (Cape Town metropolitan area). Information on intra-regional fish trade is limited in a number of key areas like policy regulatory constraints and incentives, main operators and their relationship along the market chains and factors affecting participation of women and the poor (Ansen, 2015). Policies have been put in place at national and regional levels to ensure that barriers to intra-regional fish trade are removed and trade as a whole runs smoothly; this is clearly stated in the SADCs Protocol on Trade (1996). The protocol emphasises the elimination of all import and export duties as well as all non-tariff barriers to intra-regional trade. It also stresses that member states must take the necessary measures to facilitate the simplification and harmonisation of trade procedures and documentation. According to the SADC's Protocol on Trade, sanitary and phytosanitary (SPS) measures shall be based on international standards and guidelines in accordance with the World Health Organisation (WHO).

The SADC's Protocol on Fisheries (2006) supports the latter's view by emphasising the reduction of barriers to trade and investment, and the creation of favourable economic conditions to support sustainable fishing and processing activities to promote regional food security. The protocol also focuses on the promotion of trade in fish and fish products as well as the value added processing in the region. Finally, imports and exports within the SADC region shall enjoy freedom of transit across their borders, only subject to payment of normal rates for services rendered (SADC Protocol on Trade, 1996).

The National Regulator for Compulsory Specifications (NRCS) together with the Department of Agriculture, Forestry and Fisheries (DAFF) (former Marine and Coastal Management – MCM) and the South African Department of Health (DOH) regulate all food and agricultural imports. Another involved party includes the Department of Trade and Industry (DTI) (DOH, 2009). The NRCS is assigned to strictly control and manage the import of fish and fish products through three standard compulsory specifications. The specifications cover the requirements for the handling, preparing, packaging, processing, freezing and storage of fish and other fish products (DOH, 2009). A list of general documents required for imports into South Africa as

well as more specific documents required to import fish products are highlighted. This includes an import permit issued by the DTI accompanied by a letter from the country of origin indicating that the export of products has been approved. Large South African importers obtain annual permits from DAFF while small-scale importers have to renew their import permits every time they import (DOH, 2009). The import and export food regulations within the RECs and the South African food import regulations are analysed in this study. This is done in an attempt to determine if the existing policies meant to foster intra-regional fish trade and regional food security are being adequately implemented and also whether they act as a constraint (and if so, how). Appropriate national and regional policies can have a major impact in promoting trade and strengthening regional food security. The lack of harmonised food safety and regulation standards for fish can be an impediment to regional trade, as states can use their own safety standards as non-tariff barriers (Ansen, 2015). The trade of fish across national borders using formal channels involves time consuming and complex formalities. The large number of police checkpoints on roads take advantage of these long procedures to extort illegal payments thus increasing transaction costs. This study looks into the constraints faced by fish traders, importers and wholesalers alongside the policies that have been put in place to facilitate intra-regional fish trade.

2.9 Regional integration in the European Union in relation to regional integration in Africa

The European Union has exhibited a track record of economic policy coordination and security related collective action. The past decade has triggered new types of policy coordination. The debt crisis of 2008 had also effected change in the European Union (Blizkovsky and De Gregorio Merino, 2016). This change can be seen in the Union's evolution towards a genuine economic and monetary union. Sovereignty amongst its members is mutually shared at a qualitatively new level, which is different compared to the pre-crisis situation. The European Union suffered from a sovereign debt crisis which tested the use of its single currency, as such she decided to move towards a genuine economic and monetary union. Their resistance to economic crisis has been increased due to policy instruments like the European stability mechanism and the creation of the monetary union (Blizkovsky and De Gregorio Merino, 2016). The Euro crisis prompted the economic integration of the European Union and the Euro

Zone¹, hence the solutions provided by the Union brought to light a European Union principle, which states,

“It is much harder to integrate than to disintegrate” (Blizkovsky and De Gregorio Merino, 2016).

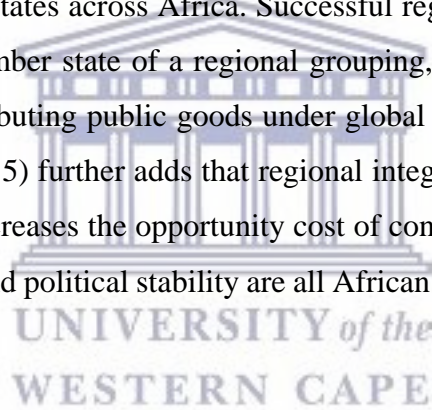
Integration therefore occurred in two major fields, namely economic and monetary union (Clerc and Crard, 2012; Craig, 2012; De Gregorio Merino, 2012). The banking union was another major reform project introduced by the European Union after its crisis, which aimed to break the vicious cycle between lucrative and less lucrative banks (Blizkovsky and De Gregorio Merino, 2016). There has also been the reinforcement of economic governance based on treaties, through inter-governmental instruments. Externally, the European Union has become a more reliable partner with economic stability both to itself and globally. The Union can now focus on its own growth and agenda as well as fulfil its role in international relations. Overall, the European Union has greatly evolved after its sovereign debt crisis. It is more integrated now than ever, especially through its banking union.

The beginning of African integration is to say the least promising as it recognises the need to redefine the parameters of socio-economic, political and security developments on the African continent (Kuhnhardt, 2008). For Africa to have a better future, its people would need to benefit materially and its leaders ought to take their roles and responsibilities seriously. It was therefore crucial for Africa to adopt the concept of regional integration as a means to give the continent a new promising perspective. However, issues pertaining to weak and fragile states, fragmented nations and governance will have to be addressed (Kuhnhardt, 2008). So far, African leaders have not been able to clearly identify and define the work ahead for the eight regional groupings or of their possible merger with the African Economic Community. African institutions of regional integration lack human resources, so does the academic sector. Compared to Africa, the European Union is, supported by 13,000 civil servants meanwhile the AU counts 700 professionals (Kuhnhardt, 2008). While their commitment and competence is undeniably good, the figure is simply too small to cope with rising expectations meaningfully. Integration building in Africa requires building human capacity to enhance its quality and breadth. There

¹ The Eurozone is a monetary union made up of 19 of 28 EU member states who have adopted the Euro as their common currency (Found at Quora <https://www.quora.com/What-is-the-difference-between-the-European-Union-and-Eurozone>)

is also a huge need to increase academic training facilities; together with African partners in Europe, and develop and launch comprehensive programmes at both tertiary and further education levels dealing with integration matters (Kuhnhardt, 2008).

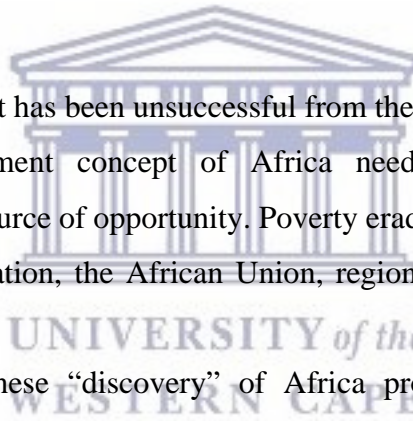
According to Melo (2015), regional integration and cooperation is the way forward in Africa as there are many regional externalities that can be addressed through regional cooperation. For regional integration objectives to be attained, clarity about normative preconditions, political objectives and genuine goals of value ought to be clearly defined and regularly readjusted to reflect the most recent progress made. In light of many failures in African development in the past decades, it would seem like regional integration may be understood as the panacea to run away from the failed past. According to Kuhnhardt (2008), experience has shown that weak states only produce weak integration. Strong regional integration requires solid, functioning and accountable national structures. Hence, regional integration should not be a substitute for reforming states across Africa. Successful regional integration requires the solid preparation of each member state of a regional grouping, hence the pooling of limited resources and the act of distributing public goods under global conditions of the 21st century (Kuhnhardt, 2008). Melo (2015) further adds that regional integration will need good politics as trade-creating exchange increases the opportunity cost of conflict. Economic development, social inclusion, rule of law and political stability are all African challenges that go beyond the ability of individual states.



In addition to political benefits, reductions in trade barriers have helped to integrate markets (Melo and Tsikata, 2014). However, market integration has been disappointing because of high trade costs recorded. Moving past the removal of barriers at borders to the next stage of deeper integration has been even slower due to the continuous negotiations and signing of RTAs. The African people must therefore be given a sense of ownership and degree of inclusivity in governance and management of public affairs. Regional building also entails trust, sincerity and honesty of one's partner to overcome the point of mutual suspicion. Genuine and real trust-based regional building requires mutual recognition of the regime of governance of all parties in a grouping. As a result of the above preconditions for a solid regional integration, it does not come as a surprise that to this day no African regional grouping has addressed the issue of a common legislation. The recognition of the objective of democratic region-building must clearly state the starting point and ultimate objective of sincere and sustainable regional integration processes. A case point in Europe is central and south Eastern Europe which did

not become part of the European Union until they had individually become functioning democracies and accountable pluralistic states based on the rule of law and market economy (Melo and Tsikata, 2014).

The crisis faced in regional integration in Africa should not come as a surprise or disaster as the European experience suggests. Many crises in integration may suggest to be turning points in advancing regional integration. Hence, Africa may be strengthened through the experience of crises. Ample evidence suggests that the African Union and the main building blocks across Africa have gone through myriads of crises and renewals, challenges and responses above any other continent. After critically going through the crises and challenges, Kuhnhardt's (2008) working paper came up with tools and strategies. These tools have been reconsidered and several insights formulated even if they touch taboos or vested interests in Africa. A summary of insights is provided below:

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- I. Aid-based development has been unsuccessful from the early 1960s until present.
 - II. An updated development concept of Africa needs to include the poor and underprivileged as a source of opportunity. Poverty eradication is the stated goal in the United Nations declaration, the African Union, regional groupings as well as many donor countries.
 - III. The most recent Chinese “discovery” of Africa provides new insights into the development potential of Africa as well as its problems of development (Sautman, 2006).
 - IV. The Chinese development model may not serve as a comprehensive model for Africa. Africa does not share with the countries of North East Asia, the strong economic nationalism that benefits from competition among the countries of that region (Sautman, 2006).
 - V. In the course of western modernization, rule of law has preceded democracy; it cannot be a different scenario in Africa. Reliable and consistent rule of law is the key to advance domestic stability and regional integration (Kuhnhardt's, 2008)

Worthy of note is the fact that some regional groupings have become most advanced in their structure and objectives. They may not have become expressions of deep integration that encompasses regional legislation, but they have undergone internal transformations and shifts

in priorities. This is an approach that has enabled them to become more encompassing and comprehensive compared with their initial ambition. ECOWAS and the SADC are cited by Kuhnhardt (2008) as the most successful examples of deepened integration amongst sub-regional groupings in Africa. According to the author, they represent the strongest potential to continue on this path with sustained success and in the years to come, the EAC may follow suit. These three building blocks are the most advanced and comprehensive regional groupings in today's Africa; they may eventually mature into African equivalents of the European Union. In turn, the African Union may develop into a hybrid of the Council of Europe and the Organisation of Security and Cooperation in Europe, a collective security organ defined by the quest for a common identity and its global recognition.

2.10 European Union (EU) food safety policies and procedures

The EU's food safety policy aims to ensure that EU citizens enjoy safe and nutritious food produced from healthy plants and animals, whilst enabling the European food industry, which is the largest manufacturing and employment sector, to operate in the best possible conditions (EU, 2014). This policy safeguards health along the entire agro-food chain; from farming to consumption, by preventing food contamination, promoting food hygiene, food information, plant and animal health as well as welfare. The three main objectives of this policy are:

- I. To ensure that food and animal feed are safe and nutritious.
- II. To ensure a high level of animal health, welfare and plant protection.
- III. To ensure adequate and transparent information about the origin, the content and use of food in terms of labelling.

The EU is a single market; therefore, goods including food items can be sold freely all over the region. Hence the task to ensure healthy food is a cross-border issue because much of the food consumed crosses borders. This gives consumers a much wider choice and lower prices due to increased competition compared to when food can only be sold within a country (EU, 2014). This also means that the most important rules for quality and safety must be set as European-wide laws. Worthy of note is the fact that there could not be any free trade if every product had to be controlled in every country according to individual country rules. Different rules will mean that products in some countries will benefit from unfair competitive advantage. African countries and regional blocs could learn valuable lessons from the EU in this regard, by harmonising their individual country policies to facilitate trade in food and regional integration as a whole. Moreover, the agricultural policy as a whole is an EU competence which gives

them the possibility to influence the quality and safety of EU food via rules of economic support that are agreed for farmers. Thanks to these EU rules, European citizens benefit from some of the highest food safety standards in the world (EU, 2014). Compulsory checks take place throughout the agro-food chain making sure food is of high quality and appropriately labelled and adheres to all strict EU standards.

Despite the above regulations, the modern global market comes with its own challenges in maintaining these standards:

- I. Preventing animal and plant diseases from entering and circulating in the EU.
- II. Preventing the spread of diseases from animals to humans. There are currently over 200 diseases which can be passed to humans from animals through the food chain, for example *salmonellosis* from salmonella bacteria.
- III. Ensuring common rules are maintained across the EU to protect consumers and prevent unfair competition.
- IV. Ensuring consumers have clear, unambiguous information on the content and origin of food.
- V. Contributing to global food security and providing people with access to safe and quality food. It is predicted that by 2030, there will be the need to feed 8 billion people globally with an increased demand for meat-rich-diets. World food production must increase by at least 40% to meet that need; 80% of this increase will need to come from more intensive crop production (EU, 2014).

2.10.1 Regular checks within the European Union to meet food standards

Business operators are primarily responsible to ensure that food they place in the market is safe. EU authorities carry out regular and strict controls to ensure that the EU's high standards for food are maintained. Official controls enforce the rules put in place. These controls are carried out regularly by well-trained, independent and impartial officials. They must use state of the art techniques and methods; they rely on a wide network of official laboratories for any tests or analysis needed to verify compliance with the rules (EU, 2014). This has been identified as one of the biggest challenges by many authors who have written on regional integration in Africa – the absence of structures, mechanisms, technology and trained personnel to carry out these checks at the borders while enforcing the rules put in place.

2.10.2 Official controls at the European Union borders

The EU's border control on food, feed, plants and animals imports are essential to safeguard public health as well as animal and plant life. It is also to ensure that all imports meet EU standards and can be placed on EU markets. Border controls are tailored to different commodities, products and hazards they might carry. For instance, strict channelling and controls apply to certain food and feed and to animal products. Most of these commodities must be accompanied by specific guarantees regarding their health status, like veterinary or phytosanitary certificates.

2.11 Boosting intra-African trade and the way forward

According to a UN report by Africa recovery (2002), African countries are struggling to undo a colonial legacy dominated by trade with former colonial rulers rather than with each other. Most African countries today still trade more with countries in Europe and the United States than with their fellow African countries. For instance, Gambia trades extensively with the United Kingdom (UK) and Senegal's biggest trading partner is France. Although Senegal surrounds Gambia, trade between the two neighbours is minimal (Africa recovery, 2002). One is left to ponder on the reasons why a continent endowed with a rich array of resources and potential would not want to share and utilise these resources within the continent for economic growth and the welfare of its entire people. When asked why some African countries like Tanzania still negotiate economic partnership agreements with Europe, while the said partnerships were unfair to Tanzania and Africa in general, former Tanzanian Prime Minister Sumaye responded saying there was a need for Tanzania and other African countries to look at the European markets, and see if their goods were competitive enough to trade with big economies in Europe. He further stated that African countries often rush into trade agreements with big markets knowing fully well they cannot cope (Africa recovery, 2002).

In addition, the continent's railways and roads often lead towards the ports rather than link countries across regions. Flying from one African country to another, is often easier to pass through Europe. Due to the hindrances of trading within Africa, exports from Tunisia and Cameroon often find their way to French warehouses before being redirected to each other's market shelves (Africa recovery, 2002). Hence lower tariffs on African goods entering European Union and US markets also make exports to industrial countries more lucrative than to other African countries. Sumaye argues that there is still a dependency syndrome in Africa, where African countries think that European countries have the responsibility of developing

Africa. He believes this syndrome has made Africa lag behind economically. Africa recovery (2002) also cites the example of trade within the ECOWAS where there are deliberate efforts by officials to violate the principle of free movement of people and goods within the region. This is also as a result of the slow implementation of regional integration agreements aimed at eliminating tariff and non-tariff barriers in the region. Despite declarations of support by politicians for regional economic ties, the reality on the ground for traders remains difficult (Africa recovery, 2002).

Experts acknowledge that for Africa to capture greater trade opportunities there is a need to diversify their products. Since most African countries produce and export raw materials, not processed goods, there is little that they are interested in importing from each other. Intra-African trade is dominated by a handful of countries selling a handful of products. Of key importance to this trade are primary products because manufactured goods account for only 15% of exports (Africa recovery, 2002). African countries need to stop trading in unprocessed commodities and rather turn these raw materials into semi-finished products and add value to Africa's products by processing them, hence creating employment opportunities as well. Countries should be able to come up with programmes that will help the region to develop and refrain from budget deficiency, which is failing most development projects on the continent (Sumaye, 2012).

African countries will require that the private sector play a dynamic role as they pursue more trade opportunities. Many African countries have a private sector which is often made up of a large but small-scale informal sector at one end and a few giant multinational corporations at another end. Hence, there is a big challenge for African policy makers of how to deal with a small-scale informal economy that is significantly responsible for a large portion of production, trade and services (Africa recovery, 2002). The backbone of most economies in Africa is the informal sector, but its overall contribution to the economy goes largely unrecorded, it is highly unregulated, it is often not taxed and has little access to finance. According to a FAO paper on formalizing informal trade (2017), informal trade is estimated to provide 70% of employment in sub-Saharan Africa as well as bringing significant socio-economic benefits for those engaged in such activity. In the SADC region for instance, informal trade makes up an estimated 30-40% of total intra-SADC trade with an estimated value of \$17.6bn (Koroma et al, 2017). The informal economy cannot continue to be ignored if integration is to succeed. African countries are beginning to prioritise trade with each other. In so doing, they are

increasingly viewing the informal sector as a partner. Fundira (2013) argues that, the informal economy in the EAC as with other African countries is largely comprised of small and medium scale enterprises that are considered semi-organised and unregulated. For instance in Kenya, these enterprises are responsible for employing 80% of the country's total employment which is 7.5million people (Ogalo, 2010). These figures highlight the important role informal cross-border trade can play to support Africa's ongoing efforts at addressing poverty alleviation by enhancing food security and income creation, particularly for rural populations on the continent. However, despite ICBT's potential ability to positively impact the economy as a whole, informal cross-border trade remains largely undervalued in many policy-making platforms as data on their activities is not properly captured (Fundira, 2013).

One major critique of current efforts at regional integration in Africa is that their strategy and objectives are driven by a preference for formal rather than informal trade. Informal trade is characterised by small scale trade conducted and motivated by the needs of indigenous traders. This trade is also motivated by a large market for imported goods, most especially food and pull factors such as high demand for the type of food, specifically fish, people are used to. The needs of the local people are prioritised above the needs of governments and international agencies, hence it is considered an effective means of integration from below (Africa recovery, 2002). According to Enweze (cited in Africa recovery, 2002:2), attracting the domestic and foreign private sector will greatly contribute to enhancing intra-African trade, and upholding the rule of law, as well as predictable and consistent macro-economic policies are vital requirements for a suitable business environment. The African continent is stereotyped as one in which there are civil wars, civil strife, civil disobedience, confusion and political instability. Hence, the lack of credible and stable macro-economic policies keeps investors away; policies are frequently changed and so business persons do not know exactly what is going to happen from one week or month to the other. An efficient communication and transport system is another missing ingredient in the formula. Africa's poor infrastructure network is a major cause of the low competitiveness level in the continent (Enweze, cited in Africa recovery, 2002:2).

Telephone calls between African countries can be 50-100 times more expensive than they are within North America while freight costs for imports to landlocked African countries are more than twice as high as in Asia. Investment in physical infrastructure such as telecommunications, roads, railways, power lines and air services are necessary in order to allow trade to flow regionally. Ultimately, there will be great benefits from creating regional markets in Africa,

such as boosting industrial efficiency as larger markets allow exploitation of economies of scale and mobility across borders (Amponsah, cited in Africa recovery, 2002:3). Harmonised policies could also spur faster economic growth and provide greater opportunities to attract investors. In addition, regional trade agreements can help countries sharpen their industrial efficiency, build on their comparative advantages and act as a springboard to integrate into the world economy. A more open continent will build credibility for Africa's best reformers in the eyes of the world and hopefully, reward them with greater access to markets (Africa recovery, 2002). One of these agreements include the Tripartite Free Trade Agreement (TFTA) which is a big leap towards continent-wide integration as well as a way forward to boost intra-African trade. This agreement is meant to create a Continental (Africa-wide) free trade area, promote collaboration between regional economic communities (RECs); hence, facilitate resource mobilisation and project implementation (AUC, 2013).

2.12 The Tripartite Free Trade Agreement (TFTA): The great leap forward for regional integration in Africa

The recent launch of the TFTA, now the largest free trade area across Africa, ushers in a new framework for trade and integration on the continent (Bridges Africa, 2015). The TFTA deal was signed on 10 June 2015 by representatives from the 26 countries covered by the deal. It comprises the largest regional economic communities (RECs) in Africa: the Common Market for Eastern and Southern Africa (COMESA), the East African Community (EAC), and the Southern African Development Community (SADC). According to Mabuza and Luke (2015), the countries involved in this deal represent 48% of the AU membership, 51% of continental GDP and a combined population of 632million. Hence, if the TFTA countries were one country, it would be the 13th largest economy in the world. While the scope of the TFTA economy is large, significant policy and structural bottlenecks remain to be overcome (ECA report, 2015). These include low levels of industrialisation, poor infrastructure and high transaction costs. One promising aspect about intra-re trade is that it is more diversified with a higher proportion of intermediate and value-added than their trade with the rest of the world. The launch of the TFTA comes at a time when there is a great need to expand investment in infrastructure, connectivity and production linkages in regional value chains, as a platform for improving backward integration into global value chains (Mabuza and Luke, 2015). Some technical work still remains to be done before finalising the recently adopted agreement.

The TFTA agreement is made up of 45 articles and 10 annexes. Tariff liberalisation disciplines on non-tariff barriers, rules of origin, trade remedies and provision for dispute settlement lie at the core of what was agreed. Other provisions made in the agreement include elimination of quantitative restrictions, trade facilitation, transit trade, customs cooperation, infant industries and balance of payments (Mabuza and Luke, 2015). The aim of the TFTA is to liberalise 100% of tariff lines, taking into account the usual general, specific and security exceptions. This will be carried out by cooperating with the tariff regimes of the EAC and SACU member states into the TFTA in line with the principle of building on the subject of reciprocity. In addition to the EAC and SACU countries, COMESA countries participating in the COMESA FTA made TFTA tariff offers based on tariff liberalisation on a reciprocal basis. Though the modalities for tariff negotiations agreed upon in 2013 are not ambitious, it was agreed that re-negotiations will be carried out over a period of 5-8 years (Mabuza and Luke, 2015). At the time of the TFTA launch, not all tripartite countries had finalised their tariff offers. The third tripartite conference held in Sharm-el-Sheikh on June 10 2015 gave countries until June 2016 to finalise their offers.

To address the challenges of non-tariff barriers, the TFTA agreement provides for the harmonisation of the COMESA, EAC and SADC non-tariff barriers arrangements into a single mechanism and a process for identifying, categorising, monitoring, reporting and resolving non-tariff barriers in the region. The institutional framework includes national monitoring committees, a tripartite sub-committee on non-tariff barriers and focal points.

The application of anti-dumping, subsidisation, import surges, countervailing and safeguard measures to address dumping are provided in Articles 16-20 and Annex 2 of the TFTA agreement. A commitment was made to complete this body of work within 12 months following the TFTA launch. Meanwhile, Article 30 and Annex 10 of the TFTA agreement provide for a dispute settlement body and its powers, which include but are not limited to surveillance over the implementation of rulings and recommendations of panels and the appellate body (Mabuza and Luke, 2015). This body also oversees the elimination of quantitative restrictions, trade facilitation and transit trade, customs cooperation, infant industries, balance of payments among others. These are generally consistent with obligations under the WTO and international best practices. Details of the organs involved in the implementation of the TFTA are stated in the Article 29. These include among others, the tripartite task force (secretaries of the three RECs), summit of heads of state and Government,

the council of ministers, the tripartite sectoral ministerial committee, the tripartite committee of senior officials and experts. Finally, Article 45 on Phase 2 negotiations makes provision for a period of 24 months to conclude the negotiations on trade in services, movement of business persons, intellectual property rights, competition policy and other trade related matters (Mabuza and Luke, 2015).

2.12.1 Prospects ahead

A lot of technical work remains to be done on trade remedies, tariff liberalisation and rules of origin. The decision for list rules to be negotiated as opposed to agreeing on a general rule delayed negotiations on rules of origin (Mabuza and Luke, 2015). Negotiations for trade remedies started late and an agreement was reached that interim provisions will apply while finalising a tripartite mechanism. However, as of this year (2017), the final legal arrangements for trade remedies have been concluded but will only be applicable once the TFTA agreement enters into force (Erasmus, 2017a). This trade brief looks at what is provided for in the TR annex, how the arrangement will function and how much flexibility has been incorporated. Erasmus (2017b) further raises concerns about the ongoing CFTA negotiations and the impact it will have on participating states with the development of its own TRs. Will they be held back by the recently produced TFTA TRs or find “flexibilities” for member states that regard them as necessary? In spite of these complex issues, the TFTA agreement is a milestone in the rationalisation of Africa’s multiple trade integration arrangements. The pace has been set; there is no turning back from here on.

One of the major challenges observed during the TFTA negotiations were contradictions between negotiating principles (Mabuza and Luke, 2015). In addition, funding of the negotiations proved costly with the parties operating in four languages. The scoping of issues to be negotiated in the second phase are yet to be undertaken. The movement of business persons has been held as a preliminary discussion parallel to the first phase of negotiations. This subject is expected to be an area of early ‘harvest’ under the second phase. It is worth noting that there is a growing understanding of the contribution of services in African economies in terms of employment, incomes and inputs to other economic activities in regional and global value chains (Mabuza and Luke, 2015).

2.13 Implications of the Tripartite Free Trade Area Agreement (TFTA) for the Continental Free Trade Area Agreement (CFTA)

On June 15 2015, it was decided at the AU summit that negotiations on goods and services for the establishment of the Continental Free Trade Area will be ongoing (Mabuza and Luke, 2015). The first phase of the negotiations is expected to be concluded by the end of this year (2017). Luke (2017) adds that there has been continuous and strong emphasis on the importance of ensuring that the process is participatory, inclusive and consultative. The CFTA will offer the continent an important tool for achieving Africa's poverty reduction objectives contained in the continent's Agenda 2063 and the Global Agenda 2030 (Luke, 2017).

The main implication of the TFTA for the CFTA is that the TFTA is now part of the trade integration on the continent; this means that the success of the TFTA will be used to build on the CFTA. A CFTA agreement on trade in goods could begin with the TFTA and the 15-member Economic Community of West African States (ECOWAS) bloc which already has a common external tariff. Mabuza and Luke (2015) recommend in their article that the TFTA and ECOWAS bloc of countries could build on their current prevailing duty-free trade regimes or on tariff lines with zero tariffs as a starting point. This will be done with a view towards eventually permanently eliminating tariffs on other products in a phased but incremental manner. The overall aim should be to limit as much as possible 'sensitive products' so that the benefits of the CFTA on goods can be maximised. Rules of origin proved to be thorny in the TFTA negotiations; it will also need to be tackled effectively in the CFTA negotiations. Other RECs like the Arab Maghreb Union (AMU) and the Economic Community of Central African States (ECCAS), which do not yet have functioning FTAs could subsequently join the CFTA and undertake the required effort to make it fully continent-wide (Mabuza and Luke, 2015).

Regarding trade in services and other issues of concern, it was envisaged that the CFTA negotiations would be conducted in parallel since both negotiations were given an initial 24-month time frame. Commitments in the TFTA could be extended towards the CFTA as a starting point for negotiations with ECOWAS and subsequently to the North and Central African blocs. What cannot be denied however, is that policy makers have acknowledged the need for major trade policy reforms if the 'Africa rising' narrative is to fulfill its potential (Mabuza and Luke, 2015). In addition, the first steps towards this journey have already been taken.

2.14 The launch of the Continental Free Trade Area as a way forward for effective African integration

Negotiations were launched for a Continental Free Trade Area (CFTA) at the AU summit in Johannesburg, South Africa on 15 June 2015. The CFTA is a priority initiative under the AU's Agenda 2063, which has laid out a vision for the trajectory of African development for the next five decades (Bridges Africa, 2015). The CFTA is one of the pillars for the implementation of the Agenda 2063 aspiration for a prosperous Africa, based on inclusive growth and sustainable development. This aspiration will be met by implementing policies aimed at achieving systematic convergence with more developed countries and regions, and growing integration into the global economy as a respected partner (Bridges Africa, 2015).

It is expected that the CFTA will bring together the 54 countries of the AU with a population of over a billion people and a combined GDP of US\$3 trillion. According to UNECA (2013), successful conclusion and implementation of a CFTA agreement alongside efforts to improve trade-related infrastructure and customs procedures, reduced transit and other trade costs could lead to a 52% increase (\$35 billion) increase in intra-African trade by 2022 (Bridges Africa, 2015). The summit held in Johannesburg clarified the scope, guiding principles, institutional arrangements and other practicalities to support the negotiations. This year (2017) was reaffirmed as the indicative date for the finalisation of the negotiations. As of March this year (2017), the CFTA-NF had chaired five meetings towards finalising the draft modalities for negotiations on both trade in services and tariff liberalisation (TRALAC, 2017). The ambitious time-frame for the CFTA negotiation is due to the fact that the implementation of the Abuja Treaty which provides the legal basis for the negotiations is running behind schedule. The Abuja Treaty provides a road map to advance regional integration in Africa, with key benchmarks such as the establishment of a customs union by 2022 and an African economic community by 2028 (Bridges Africa, 2015).

Even though the RECs remain important building blocks with implementation capacities, the focus is now shifting towards continent-wide arrangements. Therefore, the CFTA negotiations is an upgrade in the approach to integration in Africa and political initiative to keep implementation of the Abuja treaty on track. Hence, the ambition to reach the core of a CFTA agreement within two years can be understood against this background. The CFTA was also launched in a context of growing uncertainty over the future direction of the global trade landscape and the multilateral trading system, with the rise of Mega-Regional Trade

Agreements (MRTAs) and regional comprehensive economic partnerships (RCEPs). Africa is not a part of any of these emerging configurations and is expected to be negatively impacted by these agreements. Research carried out by UNECA (2013?) estimates that due to greater competition faced by African countries in MRTA markets, total exports could be reduced by USD 2.7 billion (0.3%), by 2020 compared to baseline without MRTAs in place. Sodipo and Luke (2015) argue that while this trade diversion may be perceived as insignificant, Africa's exports could decrease in critical categories, with the largest reduction in industrial goods. However, the effective establishment of the CFTA can offset the potential negative impacts of the MRTAs (Bridges Africa, 2015). Luke (2017) adds that the CFTA will provide a variety of opportunities that cater to the diversity of African countries including the agricultural-based, resource-rich as well the more industrialised. With the CFTA, African leaders also aim to among others, create a single continental market for goods and services, expand intra-African trade as well as expand competitiveness at the industry and enterprise levels (Luke, 2017).

Globally, preferential trading arrangements between Africa and key partners are changing as well. EPAs with the European Union have mostly been concluded and have introduced reciprocity into Africa's trade arrangements with Europe (Bridges Africa, 2015). African least developed countries (LDCs) continue to enjoy preferential market access to Europe. The United States renewed its African Growth and Opportunity Act (AGOA) for 10 years up to 2025. However, it has signalled that it expects to follow the path Europe has taken to move towards a reciprocal trade relationship. Effective African trade strategies for engaging with China and other emerging countries are yet to be fully articulated (Bridges Africa, 2015).

From the developments discussed above, it can be seen that without locking preferential trade arrangements among themselves, African countries participating in different RECs could offer better terms to external partners than they offer each other. Notwithstanding the political momentum to keep the mileposts of the Abuja treaty on track, the changing trade landscape and the implications of the MRTAs provide the context that have made the conclusion of a CFTA all the more urgent (Bridges Africa, 2015).

Sodipo and Luke (2015) further argue that in spite of the opportunities offered by the CFTA, it is evident that it will be a complex exercise. Negotiations will involve 54 countries and eight RECs at different levels of development with different capacities. The closest equivalent is the WTO, but the CFTA negotiations will be carried out without the technical resources of the

WTO and its secretariat (Bridges Africa, 2015). Addressing these constraints is therefore critical to the success of the negotiations. Another practical challenge relates to ensuring that the gains from the CFTA are distributed as broadly as possible among the participating countries. Concerns have been expressed by smaller countries that larger countries will dominate the CFTA both in terms of the outcomes as well as the negotiations (Bridges Africa, 2015). These concerns accentuate the importance attached to principles such as special and differential treatment to ensure the necessary flexibilities to address different development needs. It is also important to make sure that the weight of the obligations is not borne by the few large and relatively more developed countries, as the majority of countries in the CFTA are LDCs. It will be crucial to take on board the experience of how the RECs have dealt with these issues in practice and the lessons that can be adopted.

Sodipo and Luke (2015) suggest that the CFTA negotiations should pursue a two-step approach that will entail aiming for agreements with commercial value in all feasible areas, and continue negotiations beyond this year (2017) in all outstanding areas if necessary with a flexible time frame for completion. Finally, the launch of the CFTA negotiations marks the beginning of a process that could bring Africa closer to its development goals and the achievement of the Agenda 2063 objectives. Aside from the tangible benefits that the CFTA will bring, its successful negotiation and implementation will signal the continent's readiness to break from the negative narratives of the past towards a future based on shared prosperity (Sodipo and Luke, 2015).

2.15 Conclusion

This chapter focused on the integration process in Africa from its inception to the unfolding process of regional economic communities and the regional integration agreements signed between these communities. The chapter also looked at the progress that has been made so far in integration trade policies between countries and regions as well as the challenges that the continent has faced and is still facing today. Policies and regulations set out to facilitate intra-regional fish trade in Africa were also looked at as well as the state of trade in fish on the continent today. An overview of integration in the EU was given while highlighting some best practices that could be emulated by African countries and regions in their integration process. Challenges faced by the EU from the Eurozone to their deep integration process was also outlined, highlighting measures taken in dealing with their challenges to where they are today. The chapter attempted a way forward regarding deeper integration in Africa through the

ongoing TFTA and subsequently CFTA negotiations. The chapter unpacked the TFTA by looking at the nature and implication of the agreement reached during the tripartite summit, and how it affects the CFTA negotiations. Discussions also emerged on the likely impact of these partnerships and agreements on regional integration processes in Africa.

As Africa moves closer to consolidating its vision of regional integration, challenges as well as opportunities at the global, regional and national level present themselves along the way. The global landscape is continually changing hence the proliferation of new preference schemes. The continent must also continually expand in terms of its economic schemes in order to keep up with global trends.



3 CHAPTER THREE METHODOLOGY AND STUDY AREA

3.1 Introduction

This chapter presents the methods adopted for this study. Data sources which were used for the study as well as how data was collected and analysed in relation to the research questions and objectives, are presented. Methodology entails the details of the research methods used in collecting and analysing data and the general philosophies that underpin these methods (Creswell, 2009). The first part of this chapter provides a rationale for the methodological approach used to gain insight into the modalities of the trade of fish in the Cape Town Metropolitan area. An overview of the case study area is provided and the chapter concludes by highlighting ethical considerations and the challenges faced during the research process.

3.2 Research approach and study design

The study was designed to enable the understanding of the modalities of fish trade in the Southern African corridor as a sub-unit of the fish trade project, by looking at shops specialising in food for people from the Diaspora living in Cape Town. The perception of regarding fish trade as an insignificant means of livelihood needs to be changed so that people in fish trade can be understood not only as contributors to the development process, but also as stakeholders to be engaged in policy processes. The study had been designed to generate knowledge and information which would assist policy makers as well as contribute to the fish trade programme being implemented by the WorldFish Center. A qualitative approach was employed as a basis for the study. A qualitative research approach is based on exploring, describing and understanding the depth of meaning of individuals' experience (Watkins, 2010; Denzin, 2009; Given 2008). It is best suited to investigate a phenomenon that needs a complex and detailed explanation, and that is aimed at describing the contexts, characteristics, experiences of participants and their attitudes towards the phenomenon (De Vos et al, 2011; Creswell, 2009). A qualitative approach also involves the collection of broad narrative data in order to gain understanding into the phenomenon of interest, in this case the import and trade of fish from other African countries into the Cape Town Metropolitan area. Therefore, the researcher found qualitative research to be the most appropriate approach to gain insights not only to the questions asked but also to the questions that may not have been included when designing the study. The qualitative approach added value to the study in terms of identifying and understanding the value-chain process of the imported fish, from the wholesalers to the

consumers in Cape Town. The approach also assisted in identifying key informants in the business who are both traders and shop owners. These informants were able to provide vital information that contributed to the study.

3.3 Study area

The study focused on the Cape Town Metropolitan² area, specifically on foreign shops that sell fish and fish products imported from other African countries. The decision to choose this area was informed by the fact that the metropolitan area has shops that specialise in fish from other African countries. A preliminary study was also carried out in Johannesburg and Pretoria, where there are also a number of traders, wholesalers and shop owners who import and sell fish from outside South Africa. The significance of the above study area is that findings are likely to be applicable to other metropolitan areas in the country. Given that there are a limited number of these foreign shops in the metropolitan area, purposive sampling was used to identify and interview shop owners and traders. The research was conducted in areas where most of these shops are found.

3.4 Interviews

Semi-structured interviews were used with key informants using a question guide. Interviewees included shop owners, traders, wholesalers as well as customers, while the government representatives included officials from the City of Cape Town Environmental Health Services and the Department of Health. A total of 20 shop owners/wholesalers that specialise in fish imported from other African countries were interviewed in the Cape Town Metropolitan area. Purposive sampling³ was used for selecting the key informant shop owners, fish traders and consumers to interview, given that there are only a limited number of specialist shops, traders and trend consumers. Alongside the purposive selection of the key informant interviewees, elements of a snowball approach⁴ were also used by the student as the study unfolded, to identify more shop owners/traders.

The interviews were conducted for approximately 15 to 60 minutes in the respondents' respective shops or administration offices. During the interview process, additional questions

² The Western sub district area where foreign food shops are found.

³ Sample units are chosen on purpose based on certain key criteria such as running a specialised shop that sells fish imported from other countries. (Ritchie and Lewis, 2003).

⁴ An approach where research participants are asked to assist researchers in identifying other potential subjects (<http://research.oregonstate.edu/irb/policies-and-guidance-investigators/guidance/snowball-sampling> 2010)

were posed to the respondents through probing (Patton, 2015). This allowed respondents to elaborate further on their brief responses (Gibson & Brown, 2009) which gave rise to effective understanding of their responses. English and occasionally French was used as a medium of exchange during the interviews. A list of general questions guided the semi-structured interviews. Responses were hand written, with the consent of the interviewees. From a gender perspective, five out of (total number?) of the interviewees were women who ran and controlled the business, while the rest were men. The women stayed back to run the shops while their husbands travelled to other countries like Mozambique, Zambia, DRC, Zimbabwe, Nigeria and Cameroon to buy and import fish as well as other food items for import into Cape Town. It was also noticed that five of the foreign shop owners interviewed are also wholesalers; they buy and import in huge quantities and sell to their counterparts in the business. Wholesale goods were not limited to only fish and fish products but also other food items which, according to shop owners, boost the profitability of the business as a whole.

3.5 Observation

The observation⁵ method can reveal certain aspects that the interviews failed to bring to light. According to Creswell (2009), knowledge gained from participant observation, not only helps facilitate a better comprehension of data collected via methods such as interviews, but also assists in structuring questions which will make it easier to comprehend the issue under investigation. The researcher carried out this method by going to the shops to record and take photographs of the products on sale as well as the packaging and display of fish. Pictures of fish and fish products were taken as well as other items sold in the specialised shops. Customers were also observed as they came in and out of the shops to buy food items.

3.6 Use of secondary information

In order to substantiate information gathered through interviews, critical review of relevant official documents and related literature on intra-regional trade was an important part of the data collection process. The literature study assists in establishing and gaining understanding of research findings from other studies. The data sources for the study included academic publications, policy documents, published and unpublished working papers on regional integration, economic integration, regional agreements, intra-regional trade, regional economic

⁵ The type of research technique that involves the direct observation of phenomena in their natural settings (atlas.ti, 2016)

communities, fish trade, poverty reduction and food security. The document analysis⁶ method was used to analyse national legislation and policies as well as regional agreements pertaining to trade and treaties. The researcher analysed data collected *vis-a-vis* existing policies on fish trade in an attempt to ascertain if these policies facilitate the trade in fish. Document analysis was done to substantiate the information gathered during interviews. Documents were chosen based on their relevance to the objectives of the study and the research questions.

Preliminary studies had been done (WorldFish, 2015) on the modalities, products and value of intra-regional fish trade. This study took into consideration these findings in trying to assess how far existing policies go in facilitating regional fish trade (WorldFish, 2015). Also, the papers selected were those that contained a significant analysis of regional integration in Africa, regional economic communities and similar arrangements in the EU. The main focus of the literature review was to explore how much information about regional integration and intra-regional trade has been studied and published. Hence, the review enabled finding relevant literature and filling the gaps.

3.7 Selection of respondents

Through purposive sampling, the researcher decided on the participants that could best provide the required information on the types and forms of fish they import as well as requirements to run their shops. Gubrium (2010) argues that purposive sampling is recommended for researchers in need of specific data in selecting a case relevant to their project. Hence, in the context of this study, shop owners, fish traders, fish wholesalers, fish importers, consumers, government officials from the City of Cape Town and the Department of Health were considered carefully based on prior knowledge of their responsibilities and knowledge. This guaranteed that applicable data came from the designated target. The snowballing technique was also used throughout the data collection process, whereby respondents were asked at the end of the interview if there were others in the same area or other areas who could be contacted. Due to the interconnected networks between the shop owners, wholesalers, importers and customers, it was determined that the use of the snowballing technique would be a proper approach for finding and identifying additional interviewees.

⁶ A systematic procedure for reviewing and analysing documents, both printed and electronic to elicit meaning and gain understanding in order to develop empirical knowledge (Corbin & Strauss, 2008 cited in Bowen, 2009)

3.8 Data analysis

Analysing qualitative data involves summarising, disassembling, segmenting and reconstructing data to establish relevant findings, which will be discussed and interpreted (Boeije, 2010). Thematic analysis is mostly applied when analysing qualitative data. This involves identifying emerging themes within the interview notes and documents that relate to the research question (Creswell, 2013; Patton, 2015). Bryman (2012) contends that themes are common ideas and patterns that the researcher observes from findings. Responses from the interviews were collated into themes for interpretation and analysis. The following themes were generated: nationalities of shop owners, consumer base, fish forms and species from outside South Africa, local fish sold by shop owners, and prices of fish sold in the shops.

3.9 Ethical consideration

Consent was sought from respondents in written form through consent forms for the study, which were agreed to and signed before collecting information from the respondents. All participants were informed about the objectives of the study and the procedures to be followed. Individuals interviewed were assured that their comments would remain anonymous, confidential and not shared with anyone but would be used solely for academic purposes. In addition, some government officials asked that their names not be included in the research, hence they remained anonymous in this thesis.

3.10 Limitations of the study

The study was not without challenges. A number of studies have been carried out on intra-regional fish trade in the Southern African Corridor. However, it was difficult to access material regarding national and regional policies, as well as permits and documents required. For that reason, there was a greater reliance on face-to-face interviews. These materials will be essential in assessing whether what is on paper, is what happens on the ground in terms of policy implementation.

The limitations encountered in the shops visited was the unwillingness of some of the foreign nationals to be interviewed. Most of the non-South African shop owners were suspicious of the researcher, whom they suspected of being linked to immigration or government officials and that she would tip-off the government on what is happening on the ground. They were therefore hesitant or completely refused to take part in the interview. Some of the shop owners thought that the researcher wanted to steal their ideas and techniques to start her own business, while

others plainly denied granting her an audience. In most cases, the researcher had to show familiarity by buying some foodstuff that she knows from her home country (Cameroon), or by speaking French to the Congolese shop owners to assure them that she was just a student doing research. Shop owners also refused to reveal information on their rental amounts, as well as the amount of profits they make. They only agreed to provide information on the cost of other items such as water, electricity and transportation.

Lack of knowledge of the study area was another challenge encountered. The researcher had not been to Salt River and Maitland prior to carrying out this research, hence there was a need to network with friends and colleagues who were familiar with the areas and the shops available there. The researcher visited a number of shops in the Cape Town Metropolitan area that specialise in food from other African, but this study was limited to the shops that sell food, including fish. The study thus eliminated most of the shops that did not trade in fish as well as shop owners who did not provide information that was in any way related to the study.

Public sector employees expressed caution when interviewed for fear of revealing sensitive information and being penalised thereafter. In some cases the researcher was referred to more senior officials regarding requirements for opening a food shop in the Metropole, sanitary and phytosanitary measures as well as sanctions against food shop owners who do not comply with the measures. However, these senior officials wanted to remain anonymous.

3.11 Conclusion

This chapter presented the methods used for the study. The study was designed to provide an understanding of the modalities of trading in fish in the Cape Town Metropolitan area. Semi-structured interviews as well as purposive sampling and the snowball approach were used to identify and get relevant information for the study. The researcher also used the observation method during visits to the shops to better understand the issue under investigation. Secondary information was used to substantiate information gathered through interviews, as well as to gain a better understanding of research findings from other studies. Finally, data was analysed using the thematic approach whereby interviews were collated into themes for interpretation and analysis.

4 CHAPTER FOUR RESEARCH FINDINGS

4.1 Introduction

This chapter provides a detailed outline of the findings from the data collected. It was evident during the course of collecting data that there are growing numbers of foreign shops that specialise in fish from other countries around Africa, as well as other food items, in the Cape Town Metropolitan area. The trade of fish and fish products from other African countries is carried out by mostly foreign nationals in the Cape Town Metropolitan area. Shop owners stock their shops with fish from other countries in Africa to meet the needs of their diverse customer base in Cape Town.

4.2 Nationalities of shop owners

Shop owners come from a diverse number of African countries namely, Nigeria, Cameroon, Democratic Republic of the Congo (DRC), Rwanda, Zambia and Zimbabwe. There were no foreign shops run by South Africans. See Table 1 below.

Table 1: Number of interviewees (shop owners/traders) from each country.

Nationality of interviewees	Number of interviewees (shop owners/traders)
Democratic republic of Congo	5
Cameroon	5
Nigeria	4
Rwanda	2
Zambia	1
Zimbabwe	3

4.3 Consumer base

The consumer base is also made up of mostly foreign nationals from other African countries residing in Cape Town, like Rwanda, Burundi, Malawi, Cameroon, Nigeria, Democratic Republic of the Congo, Zimbabwe, Zambia, Ghana, Ethiopia, Kenya and Tanzania. The researcher observed that customers buy mostly from the shops of their fellow citizens. According to some of the customers, this is because they are familiar with the fish and food items sold and have an understanding relationship with the shop owners from their respective countries.

Table 2: List of consumers interviewed and their countries of origin.

Nationality of consumers	Number of consumers interviewed
Angola	1
Congo Brazzaville	6
Cameroon	6
DRC	10
Nigeria	8
Rwanda	3
Zimbabwe	2
Burundi	2
Malawi	2
Uganda	3

4.4 Fish species and forms

The study revealed a variety of fish species. Some of the foreign-owned shops specialise in fish from other African countries while other shops sell a mixture of fish they bought from wholesalers in South Africa and fish imported from outside South Africa (see Table 1).



Table 3: Types, forms, origin and prices of fish sold in the shops.

Name of fish (common, local species/genera)	Scientific name of fish	Fish form	Source country of fish species/genera	Average prices per kilogram
Crayfish	<i>Procambarus clarkii</i>	Sun dried	Cameroon, Nigeria, Mozambique	R230
Angel fish	<i>Pterophyllum scalare</i>	Frozen	South Africa	R30
Tilapia	<i>Oreochromis nibticus</i>	Frozen	China	R31
Maasbanker	<i>Trachurus trachurus</i>	Frozen	South Africa	R30
Mackerel	<i>Scomber scombus</i>	Frozen	South Africa	R30
Stockfish head	<i>Melaogrammus aegletinus</i>	Sun dried	Norway, Nigeria	R300
Catfish	<i>Clarias gariepinuss</i>	Smoked dried	Zambia, Malawi	R185
Kapenta	<i>Limnothrissa moidon</i>	Sun dried	Zimbabwe, Mozambique	R250
Mikebuka	<i>Lates stappersii</i>	Smoked dried	Lake Tanganyika	R373
Usipa	<i>Engraulicypris sardella</i>	Sun dried	Lake Malawi	R250
Gurnard	<i>Trigla lucerna</i>	Frozen	South Africa	R35
Tilapia (bitoyo)	<i>Oreochromis nibticus</i>	Salted dried	Zambia (Luangwa)	R73
Mullet fish	<i>Mugil cephalus</i>	Frozen	South Africa	R40
Catfish (bitoyo)	<i>Clarias gariepinuss</i>	Salted dried	Zambia (Luangwa)	R85
Panga	<i>Pangasius bacourti</i>	Frozen	South Africa	R33
Ndakala	<i>Stolothrissa tanganicae</i>	Sun dried	Congo	R250
Saithe (Makayabu)	<i>Pollachius virens</i>	Salted dried	Congo	R73
Hake	<i>Merluccius merluccius</i>	Frozen	South Africa	R78.99
Snoek	<i>Thyrstites atun</i>	Frozen	South Africa	R59.90
Barracuda	<i>Sphyaena</i>	Smoked dried	Congo	R300
Smoked tilapia	<i>Oreochromis nibticus</i>	Smoked dried	South Africa	R55
Canned sardine	<i>Sardine pilchardus</i>	Canned in oil	Morocco	R42.50

Canned pilchards	<i>Sardine pilchardus</i>	Canned in tomato sauce	South Africa	R64
Mlamba	<i>Clarias gariepinus</i>	Smoked dried	Malawi	R200
Fresh water shrimps	<i>Caridina nilotica</i>	Dried	Zambia	R250

Examples of fish species from outside South Africa are, kapenta from Zimbabwe, crayfish from Cameroon, ndakala from Democratic republic of Congo, tilapia from China, usipa and mlamba from Malawi. Stockfish heads come from Norway, which are then exported to Nigeria, and then re-exported to South Africa. Local fish such as maasbanker, mackerel, angel fish, gurnard, hake, snoek and tuna fish were also sold by some of the shop owners. Fish sold in these shops come in different forms. They could either be sun dried, salted dried, smoked dried or frozen. Some of the fish like the smoked catfish are imported from Zambia already smoked, while others like the salted dried gurnard are bought locally in South Africa and processed by the shop owners.

4.5 Methodology used in calculating the average prices per kilogram

In order to establish the price per kilogram, the weights of 3-4 pieces or mounds of fish were summed up and divided by the number of items weighed. The average was then divided by the price per piece or mound. For instance, in one of the shops, packets of smoked catfish were sold at R45 per mound. Three of those mounds were weighed at 0.190kg, 0.235kg and 0.335kg. The sum of the three weights came to 0.76kg, divided by the three items equals 0.25kg. The total of R45, which was the price of one package was then divided by 0.25kg, which came to R180 per kg for catfish. Most of the local fish did not need to have their price per kilogram calculated as they had already been priced per kilogram. Imported fish was sold mostly in packages of different sizes by volume rather than by weight or mound.

Table 3 shows that the fish with the highest prices come from outside South Africa. When consumers were asked why they still bought expensive imported fish, they said that fish from their home countries make the food tastier when used to cook their local meals, so they prefer spending more money in order to get tasty meals.

4.6 Packaging and display of fish

The packaging and display of fish sold in most of the shops was similar. Shop owners used various methods to package and display fish for customers to see. The small fish were generally packed in sealable plastic bags (see Figures 1, 2, and 3) sometimes with prices indicated on each bag (prices ranged from R10 - R250) (see Figure 1) while in other instances, the bags did not have prices on them (see Figures 2 and 3).



Figure 1: Sun dried kapenta. Labelled and displayed on shelf (Price-R20 per packet).



Figure 2: Packaged sun dried kapenta from Zambia. Unlabelled and displayed (Price-R10 each).

The larger packages of crayfish were sold for R50 per package (see Figure 3), while smaller packages of crayfish were sold for R10 and R20 per package.



Figure 3: Sun dried crayfish. Unlabelled, packaged and displayed on shelf (Price-R50 each).

The bigger fish species such as stockfish head, smoked catfish and tilapia were displayed openly and individually on sheets of plastic on the shelves (see Figures 4, 5 and 6). Most of the shops have wooden built-in shelves to facilitate the packing and display of food items, for easy access to customers (see photos below).



Figure 4: Dried stockfish heads displayed without plastic bags and unlabelled (Price-R30 per piece).



Figure 5: Salted dried bitoyo from Zambia. Openly displayed on a sheet of plastic on a shelf. Unlabelled (Price-R50 per piece).



Figure 6: Smoked dried catfish openly displayed on a shelf. Unlabelled (Price-R60 per mound).

Some of the smaller sized big fish species such as catfish were also packaged in plastic bags by volume (several fish in each bag rather than individually packaged) (see Figure 7).



Figure 7: Smoked dried small pieces of catfish wrapped in plastic bags (several fish in each bag rather than individually packaged). Packed in a carton on the floor. (Price-R50 per package)

As mentioned earlier, some of the fish are not put in zip lock bags or any kind of packaging. Some shop owners said that due to the size of certain fish, it was better to display them on the shelves without plastic bags. Examples are the stockfish heads, bitoyo and catfish which were displayed on the shelves without packaging (see Figures 4, 5 and 6). According to the trader, that fish is best not wrapped as it would break into smaller pieces thereby altering the form. Consumers prefer buying the fish in its whole form. Other fish were simply displayed in bags and on floor mats (see Figures 10 and 11). That was observed in some of the shops where shelves were fully packed and there was a need for more space to display extra fish. For instance, mlamba from Malawi and kapenta from Zambia (see Figures 8 and 9) were displayed on a mat and in a bag on the floor.



Figure 8: Smoked dried mlamba displayed on a mat. Unpackaged and unlabelled. (Price- R60 per piece)



Figure 9: Unpacked kapenta stored in a bag. The kapenta came from the source country in this bag and was sold by weight.

Also sold in the shops were canned fish, e.g. sardines, which are imported from Morocco (see Figure 10) and pilchards which are local (see Figure 11).



Figure 10: Canned sardines from Morocco (red tins) neatly displayed on shelf. (Price-R17 per tin) Displayed together with the local (South African) sardines



Figure 11: Local tinned sardines labelled and displayed on shelf. (Price-R16 per tin)

4.7 Other products sold in the shops

Shop owners do not only sell fish; they also sell other food items such as rice, cooking oil, cocoyams, maize meal, yams, garri, beverage drinks, etc., most of which are imported from outside South Africa (see Figures 12 and 13). The shop owners argued that selling only fish would not make the business profitable. Thus, it is necessary to run a shop using a diverse list of products apart from fish. Shop owners pointed out that they would record huge losses if they only focused on selling fish and fish products. In this way, the other products in the shop increase the overall profitability of the business.



Figure 12: A variety of other food items displayed at a shop in Salt River (2016)



Figure 13: Other food items sold in one of the shops in Salt River (2016)

4.8 Routes used to import fish into South Africa

Six out of the twenty shop owners interviewed reported travelling themselves to the source countries in Africa for their fish supplies and the other items. In terms of the routes used, shop owners and traders reported using the following routes to import fish into the Cape Town Metropolitan area:

- One shop owner mentioned that he normally travelled by bus to Zambia and Zimbabwe to purchase and import his supplies.
- Some traders from Zambia pass through Botswana and then into South Africa by bus with their supplies.
- A Nigerian shop owner said he travelled to Nigeria to load a container of supplies, which is shipped to Durban. He then travels by road to collect his supplies from Durban.

- A Congolese shop owner who is also a trader reported that he frequently travelled to Congo, Mozambique and Zambia by air. However, his supplies are transported to Cape Town in cargo trucks.

Figure 14 below shows the different source countries that the fish supplies are imported from by wholesalers and traders into the Cape Town Metropolitan area, before they are stocked in the shops and sold to customers.

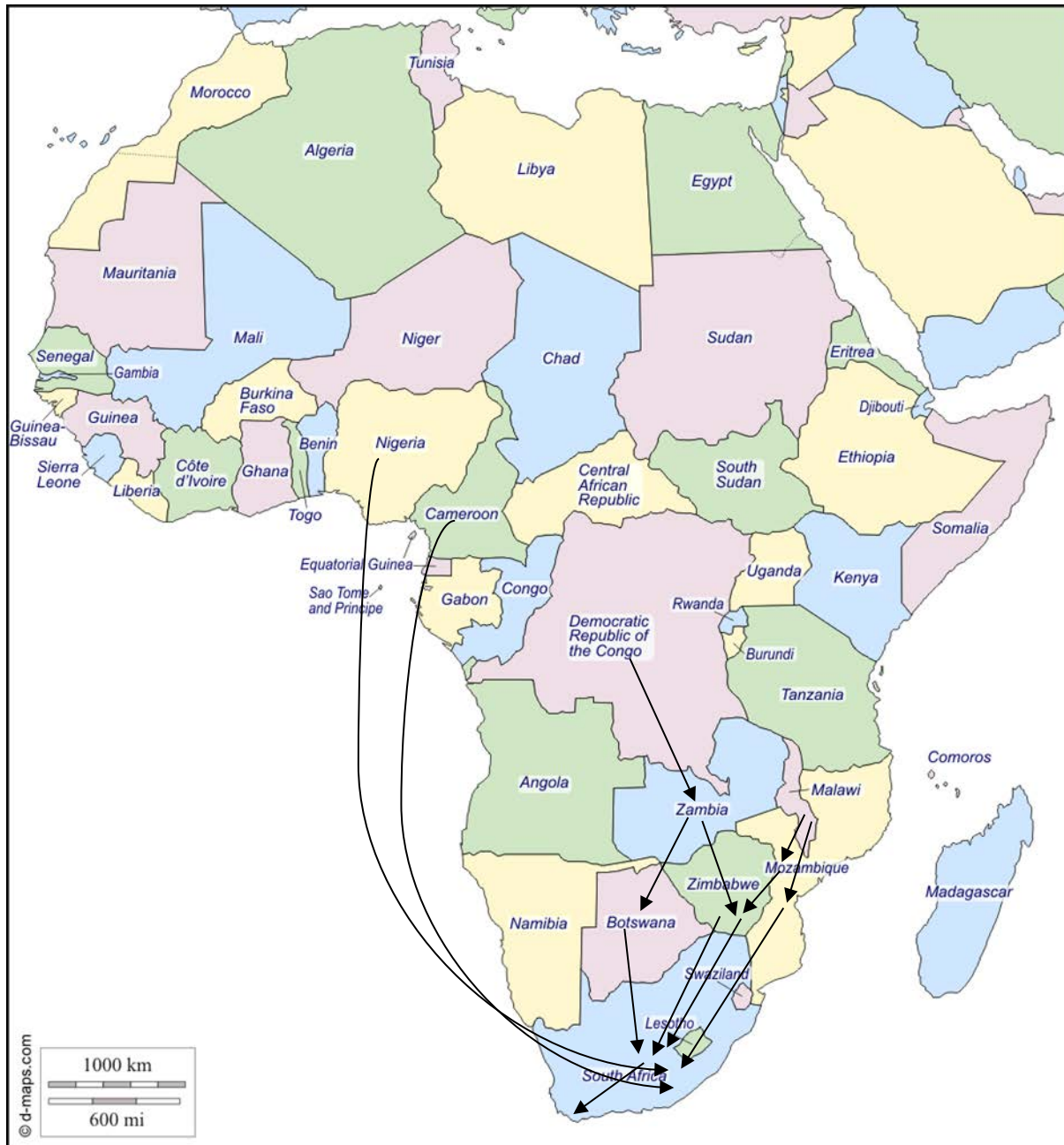


Figure 14: The routes used to import fish from the source countries to Cape Town

Source: <https://www.google.co.za/search?q=africa+maps+with+countries>

Fish is imported from Zimbabwe, Mozambique, Zambia, Nigeria, Cameroon, DRC and Malawi as seen in the map above. Traders and wholesalers use different routes to import their fish from these countries into South Africa and then to Cape Town. The most frequently used entry points into South Africa by road are the border posts at Lebombo (from Mozambique) and Beit Bridge (from Zimbabwe) to Johannesburg Park Station (the main station for most international buses) (Jimu, 2017). Some of the fish imported through Park Station is distributed in the Johannesburg and Pretoria Metropoles, and other outlying municipalities. Another main distribution market for fish is the Yeoville market in Johannesburg, while some of it comes through to the Cape Town Metropolitan area. This imported produce is sold to other wholesalers, retailers and shop owners, which is then stocked in the shops and sold to the consumers. A key respondent who travelled to buy fish regularly said he goes through the Beit Bridge border to Zimbabwe. In Zimbabwe he either buys his fish from Harare or Bulawayo. He said that he also sometimes goes to Zambia where he buys from traders in Kitwe or Kasumbalesa. The shop owner reported that he also travelled regularly to Democratic Republic of Congo for his supplies.

A majority of the shop owners reported having agents who send the fish from the various countries or from within other South African cities like Johannesburg and Durban, which is then transported to Cape Town, either by road or by sea. The researcher observed that shop owners are likely to buy from each other when they run out of supplies. Some of the shop owners who purchase food items in bulk also sell wholesale. Other shop owners buy from these wholesalers or other retailers when they run out of supplies, hence they help each other to stock their shops when the need arises. Figure 15 below shows where the fish comes from and the different routes and transit countries used by traders/shop owners, to get the fish to the Cape Town Metropolitan area. The arrows also indicate how the fish gets to its final destination, which are the shops in Cape Town, and then to the consumers.

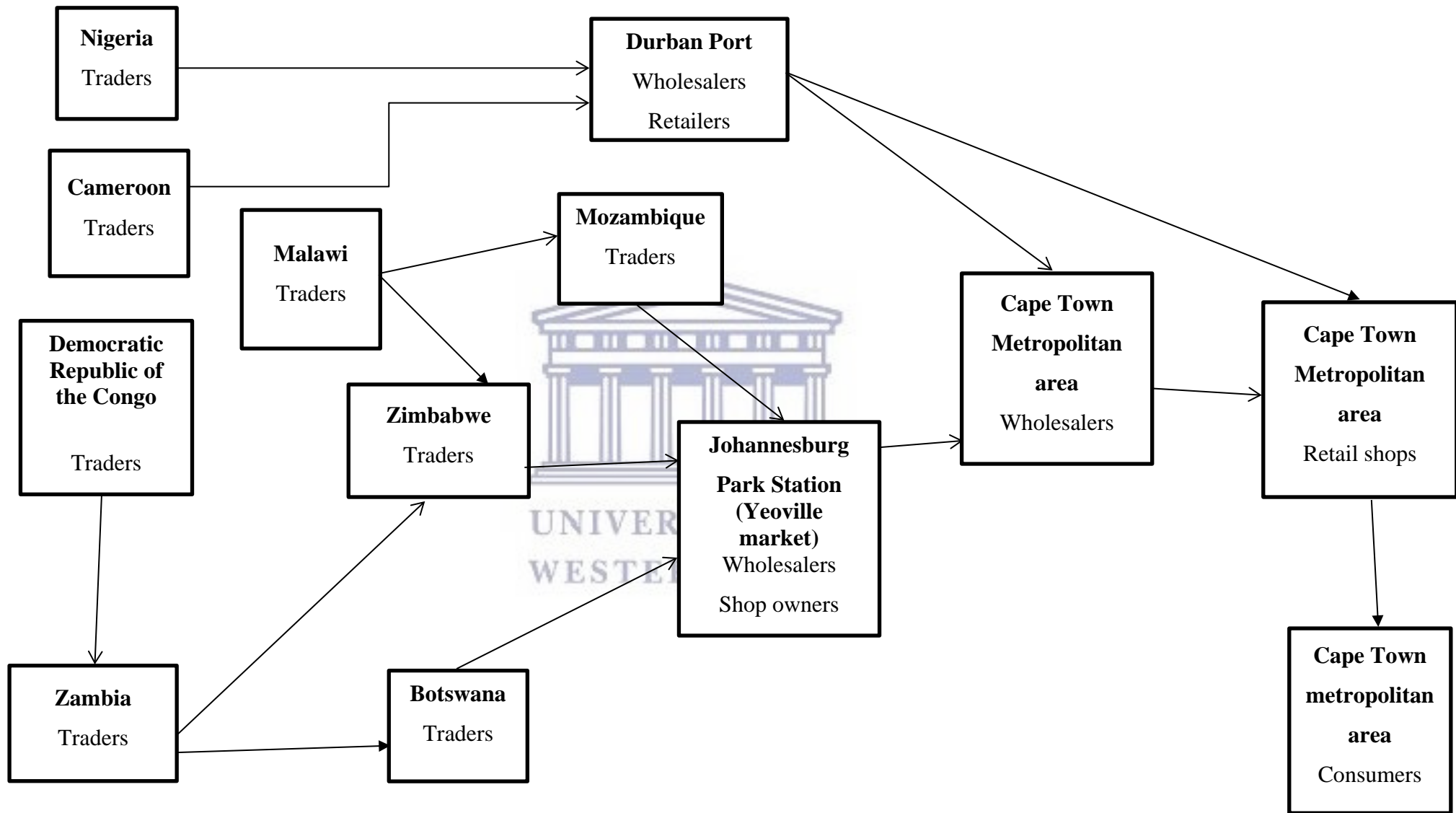


Figure 15: The different main routes used to import fish into the Cape Town Metropolitan area

The arrows in the diagram show the movement of fish from the different countries into the Cape Town Metropolitan area.

- Traders⁷ travel from **DRC** and go through Zambia, then through either Botswana or Zimbabwe and sell to wholesalers and retailers in Johannesburg. Some wholesalers travel to Cape Town to sell their fish to shop owners.
- Fish is shipped from **Nigeria** to Durban port⁸, from where the fish is transported to Cape Town by road for wholesaling or retailing.
- Traders also travel from **Zimbabwe** to Park Station, where shop owners in Johannesburg buy supplies to stock their shops. The Yeoville market is also a main distribution point for traders in Johannesburg. Wholesalers also take the fish to Cape Town to sell to shop owners.
- Fish is shipped from **Cameroon** to Durban where it is wholesaled to retailers to transport it by road to Cape Town for wholesaling and retailing by the importers.
- Traders from **Zambia** take their fish through **Zimbabwe** while others go through **Botswana** to Johannesburg Park Station, where shop owners in Johannesburg and Cape Town buy for retailing in their shops.
- Fish is also transported from **Malawi** through Mozambique and Zimbabwe to Johannesburg Park Station. Some traders from Malawi also take fish through Mozambique's Lebombo border post instead of going through Mozambique and then to Zimbabwe.
- Shop owners and traders also buy fish in **Mozambique** and take it to Johannesburg Park Station where it is sold to wholesalers and shop owners who then transport it to Cape Town.

4.9 Costs incurred by shop owners and traders

In terms of running a specialised shop, shop owners in the Parow area reported that they pay a rental for the shops they use for running their businesses. A key informant reported paying a R3800 rental for his shop while those in smaller shops paid R2500. Another key informant who is a shop owner and wholesaler disclosed that he normally spent close to R2000 for transportation from Zambia to Cape Town. He further mentioned that if he buys fish for R5000 from Zambia, he usually makes about the same amount (R5000) after costs have been deducted. When asked if the fish business is profitable, he said that it is a profitable and he intended to

⁷ This could also refer to a wholesaler or a shop owner. Some of the shop owners interviewed also import and do wholesales.

⁸ The Durban port is used to transport fish from Nigeria and Cameroon into South Africa, then to Cape Town because it is less costly for the traders.

expand his business. Below is a list of cost items incurred by one trader/shop owner who was willing to share the information:

- Rental - R3800 a month
- Electricity - R450 a month
- Permits – R825 a month, including permits to cross borders
- Fuel for transportation of goods within the metropole – R500 a month
- Transport by bus from Johannesburg to Cape Town- R800

The interviewee mentioned that he did not pay for water, as they did not use a lot of water at the shop daily. The water they needed was brought from his home in containers.

4.10 Price variations and consumer preferences

The researcher observed that the prices of fish from other countries and fish from within South Africa were different (see Table 3). Local fish like maasbanker and mackerel were sold for R30 per kilogram, which was quite cheap compared to fish from outside South Africa, like stockfish which was sold for R300 per kilogram and crayfish for R230 per kilogram. However, despite the high cost of these fish products, foreign consumers reported that they preferred buying and consuming fish imported from their own countries as it was what they were more familiar with.

4.11 Official documents required to run food premises according to shop owners and traders

During the visit to the shops, it was evident that the documents required to run the shops were similar across shops. The South African government requires these documents from shop owners to show the legitimacy of the business and most especially the safety of the food they sold to consumers. Most of the shop owners mentioned a list of documents required of them to open and run a food premises successfully. Documents listed included:

- Business registration permit
- Tax clearance certificate
- Import and export licence (to trade and import)
- Certificate of acceptability for food premises

Shop owners who were also traders reported a number of documents required of them to bring fish and other food items across borders into South Africa:

- Customs trade operations permit
- Companies and intellectual property commission certificate
- Import duties certificate

In terms of sanitary and phytosanitary measures, the majority of the shop owners interviewed said that they had an average of two visits a year from environmental health officials to ensure that their premises complied with the provisions required by the government in the handling and selling of food (see below). However, the researcher observed that the permits of shop owners who were also involved in trading and wholesaling were in good standing, while the shop owners with smaller businesses lacked most of the documents required of them.

4.12 Documents required to run food premises according to Government officials

According to officials interviewed from the City of Cape Town, any premises wanting to sell foodstuff requires a certificate of acceptability for food premises. This certificate is based on the hygiene requirements in regulation R962, which are regulations governing general hygiene requirements for food premises and the transport of food (Foodstuffs, Cosmetics and Disinfectants Act, 1972 (Act 54) of 1972). Parallel to this, most food businesses that produce a meal, such as food shops, restaurants and take-away shops also require a Business Licence. There are a number of Council Departments that report on the suitability of the premises before the license and the certificate can be issued. The first reporting department is the Land Use component which indicates if the premises are zoned correctly. The Health Department looks at the Regulation 962, the building inspectors administer the National Building Regulations to ensure that the premises are suitable from a structural safety perspective, and Fire Services report on the legislation that they apply. Should there be items that need to be rectified, the applicant is given an opportunity to comply with them. If the person fails to do so, the licence cannot be issued and the person therefore cannot trade.

The application for a Business Licence is submitted at the Environmental Health office closest to the premises and a fee of R25.00 is paid by the business owner. For instance, shop owners in Bellville applied for a business licence in the Environmental Health Services branch in Bellville. The application is then referred to all the reporting departments and the inspections

are done and reported on. Re-inspections are carried out where requirements were stipulated and as indicated, only once all the requirements are completed, will the licence and the certificate of acceptability be issued. There is an agreed timeframe for this, which is about 35 days for the shop owner to meet the stipulated requirements or the shop will be shut down.

Once a licence is granted and the certificate has been issued, the Environmental Health Practitioners continue to do inspections at the premises to ensure continued compliance with food safety standards and they may also take samples for analyses. The frequency of inspections is based on the standard of the premises and the risk associated with the products sold. After every inspection, an inspection report is provided. In the case of non-compliance, a warning letter is issued and in the event of persistent non-compliance, the matter can be taken to a court of law and the certificate of acceptability can be withdrawn to prohibit the manufacturing and sale of products. The food shop owner is required to ensure that his staff and sales persons are adequately trained in hygiene matters. Regarding food items that are imported, the food has to comply with all the standards set out in South Africa's Foodstuff, Cosmetics and Disinfectants Act (Act 54 of 1972) and the regulations promulgated under the Act. Port Health Services let through and release the foodstuff into the South African market. Once released, the Municipalities are responsible for administering the Act. Where already prepared and packaged food items are imported, the labelling regulations are of great importance. In the case of tinned, smoked and frozen fish products, the National Regulator for Compulsory Specifications is also involved to ensure that the product conforms to the standards set out for products of that nature.

4.13 Challenges faced by shop owners and traders

Shop owners, traders and wholesalers face a number of challenges in doing their business. Below are some of the main challenges highlighted:

- The procedures in acquiring documents to import fish into South Africa are long and tedious. Traders and wholesalers find it difficult to meet the right officials to acquire the documents they need to import fish. This is as a result of traders being sent from one office to another, uncertain of who is really responsible for issuing the documents.
- Some of the shops are not fully operational as they fear being apprehended by authorities for not having all the documents required to run their shops. The reasons go

back to the long procedures and cost of acquiring all necessary documents to run their shops successfully.

- Limitations on the weight of goods imported was also frequently mentioned as one of the main challenges for wholesalers, traders and importers. Since most of the importers do not import only fish, they complained of the limits put on the amount of goods they can bring into South Africa, as it reduces the profitability, diversification and growth of their businesses. Traders mentioned being legally allowed 500kg of goods into South Africa per trip, which to them is not sufficient to cover the cost of one trip. Anything above that is not accepted without paying customs duty on it. These restrictions are enforced by SARS and the National Regulator for Compulsory Specifications (NRCS). It is worth noting that the 500kg does not apply to fish only, but also to all other food items such as beans, groundnuts, sweet potatoes, palm kernels, etc. that the importer is carrying.
- In addition to the cost of making a trip outside South Africa to Zambia, Zimbabwe, Nigeria or Mozambique for business, traders/shop owners also complained of having to bribe some officials at the borders to be able to import their goods into the country. This is also the case even after the documents required had been cleared by officials from the South African Revenue Services (SARS), DOH and DAFF.
- Traders and importers also complained of long queues and laborious procedures at the Beit Bridge border. Their supplies have to be dismantled and it takes a lot more time to re-pack them after inspections. After inspection, traders have to move from one official to another from the different government offices to pay for permits.
- Both shop owners and traders reiterated that governments are not doing enough to facilitate the trade of fish and other goods between neighbouring countries. The flow of fish and other food items from other African countries into the Cape Town Metropolitan area is hindered by tedious procedures, which force some of the traders and shop owners to resort to informal methods of doing business.

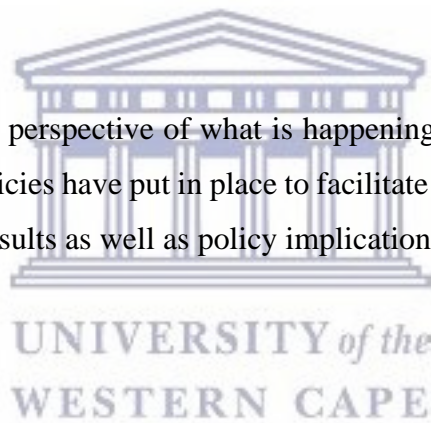
4.14 Conclusion

This chapter presented detailed findings from the field work that was carried out for the study. It provided insight on the types, forms and origin of fish from other African countries, sold in the Cape Town Metropolitan area. The chapter also analysed the means by which this fish is brought into South Africa and the specific routes that are used for transportation. The chapter

elaborated on the different routes that are used as well as the costs incurred by traders and shop owners in transporting this fish to its final destination. It reviewed costs incurred in running specialised shops. It then investigated the nationalities of shop owners as well as the consumer base for imported products,

The chapter presented a detailed list of the types, forms, origin and prices of the fish sold in specialised shops. It also presented pictures to demonstrate how the fish is packaged and displayed for customers. These pictures showed that the fish is packaged and displayed in different ways for various reasons, which will be elaborated upon in the discussion chapter. Results also revealed the price variations in the fish sold in these shops, and why consumers still preferred buying more expensive fish rather than cheaper fish and fish products. Lastly, the chapter outlined and analysed the documents needed for running a food shop as well as importing food into South Africa, as well as the challenges faced by shop owners and traders in getting these documents.

This chapter presented a clear perspective of what is happening on the ground as opposed to what national and regional policies have put in place to facilitate the trade in fish. Chapter Five will discuss and analyse the results as well as policy implications regarding trade in fish.



5 CHAPTER FIVE

DISCUSSION OF THE STUDY RESULTS

5.1 Introduction

This chapter presents discussions on the results in Chapter Four. The chapter discusses whether regional and national policies put in place facilitate the trade in fish or not, as well as South African national standards in relation to imported fish. It also discusses the routes used to get fish into Cape Town and why they are used, as well as the costs incurred in importing fish. The chapter then analyses why this fish is sold in specialised shops by foreign nationals to their consumer base and considers the consumer factors that influence the attractiveness of imported fish. It discusses issues pertaining to packaging and display of fish in relation to sanitary and phytosanitary measures. The chapter also elaborates on the challenges faced by shop owners and traders and the policy implications thereof.

5.2 Facilitatory role of regional trade agreements

Despite the fact that regional trade agreements have been ratified by SADC member states, at the regional and national levels to facilitate intra-regional fish trade, this study identified irregularities in the implementation of these agreements. At the regional level, Article 16 of the SADC Protocol on Fisheries (2001) proposes the following:

- The promotion of trade and investments in fisheries by reducing barriers to trade and investment.
- Establishing of common positions with regard to sustainable trade, eco-labelling of fish products and other fish-related issues relevant to state parties.
- Cooperation in establishing regional capacity to implement internationally acceptable standards on quality control and certification of quality.

The SADC Protocol on Trade (1996) is in line with the Protocol on Fisheries. It aims to provide for the elimination of all import and export duties as well as all non-tariff barriers to intra-regional trade. The Protocol on Trade (1996) also stresses that member states must take the necessary measures to facilitate the simplification and harmonisation of trade procedures and documentation. In addition, the protocol emphasises that sanitary and phytosanitary (SPS) measures shall be based on international standards and guidelines in accordance with the WHO. The SADC recognises the importance of fisheries in economic and social well-being as well

as livelihoods for the people of the region, in contributing towards poverty reduction and food security. South Africa is a signatory to the SADC protocol, yet limits are still placed on imports. South African standards such as the NRCS do not contain imported dried, smoked and salted fish resulting in problems of acceptability. These standards should not be used as a regulation to restrict the import and sale of the products. Malawi, DRC, Zambia, Zimbabwe, Botswana and Mozambique are all source countries for imported fish as well as signatories to the SADC Protocol. In signing this protocol, member states agreed to harmonise their domestic legislation regarding trade related issues including fish and fish products.

Although member states have signed agreements to facilitate the trade in fish, harmonising regional standards to national standards may take years to implement and domesticate, because moving past removal of barriers to the next stage of deeper integration has been slow. RTAs continue to be negotiated amongst member states; these member states may have signed regional agreements but do not necessarily implement them in their countries. This could be due to various reasons, such as:

- The unequal distribution of gains and the absence of compensation mechanisms has hampered progress in harmonising standards among member states. As a result, the import and trade of fish in the region continues to be hindered.
- The great diversity across Africa such as resource-rich, resource-poor, coastal and landlocked countries as well as different ethnic groups and languages translates into different interests and policy preferences. As a result, the supply of public goods, especially food, through the adoption of common regional policies, is hindered.
- Economic unification would require a political union. The reluctance of African leaders to encourage the eradication of national sovereignty and the emergence of supra-national authority hinders the coordination and management of affairs at the national and regional levels (Melo and Tsikata, 2014).
- Lack of harmonisation of fish standards within the SADC region remains a problem.

5.2.1 South African national standards regarding imported fish and fish products

Regarding national regulations in South Africa, NRCS strictly controls and manages the import of fish and fish products through various compulsory specifications. NRCS emphasises its obligation by law to inspect all products, including frozen fish and canned fish, as part of its mandate to promote public health, safety and ensure fair trade (NRCS, 2017). The inspection

process comprises a microbiological testing and a physical examination. Testing is supposed to be carried out at the borders by a sampling procedure, but due to lack of facilities and personnel, it is not being carried out (Jimu, 2017). NRCS has laid down specific requirements that must be adhered to regarding importing fish and fish products into South Africa; packaging and labelling, quality composition and processing/handling facilities of fish and fish products. To this end, compulsory specifications and standards have been set for the following fish and fish products according to Act (No. 5 of 2008):

- Canned fish and canned marine molluscs.
- Frozen fish and frozen marine molluscs.
- Frozen prawns and langoustines.
- Frozen rock lobsters and frozen lobster products derived from them.
- Canned meat.

Most of the fish imported by traders and shop owners is not included in the national standards outlined by NRCS. For instance, there is no mention of smoked catfish, dried crayfish, dried stockfish heads or even salted tilapia. Consequently, compulsory inspections should not be done on these products, if there are no standards for the fish and fish products sold there. Shop owners therefore cannot be penalised for not meeting standards which do not exist in the first place. However, most of these traders are not aware of the existence of these policies meant to facilitate trade in fish, or the fact that most of the fish they import into South Africa are not included in national policies, standards and legislations. In addition, some shop owners and traders are living in South Africa illegally, hence their unwillingness to pursue their rights because they fear exposing themselves to immigration authorities and end up being deported to their countries of origin. At Park Station in Johannesburg, traders who sell fish on the streets run away and abandon their merchandise when inspectors show up. This is for fear of being apprehended about their immigration status. Traders would prefer to abandon their fish on the streets and lose the merchandise than to be caught with no legal immigration papers. These factors tend to scare away traders and shop owners from exercising their rights through the existing standards legislation and regional agreements that have been put in place to facilitate the trade in fish.

5.2.2 Harmonising fish standards in the SADC region

Steps have been taken towards harmonising fish standards in the SADC region by SADC standards and WorldFish (WorldFish, 2016). The outcome is a document with proposed technical specifications regarding a harmonisation project for fish standards for the SADC region. The document contains general product specifications that require further development, discussion and agreement among member states. The harmonisation concerns some of the following ten standards:

- Standard for canned sardines and sardine-type products.
- Specification for dried freshwater small pelagics.
- Standard for farmed tilapia (bream).
- Specification for fresh and frozen whole finfish.
- Standard for fresh and chilled fish.
- Standard for quick frozen fish fillets.
- Standard for smoked finfish, smoke-flavoured finfish and smoke-dried finfish.
- Standard for salted fish and dried salted fish.
- Standard for fish sausages.
- Specification for fish snacks (crackers from marine and freshwater fish, crustaceans and molluscan shellfish).
- Good aquaculture practices for bream (tilapia) farming/culture.

The document also includes technical specifications for a number of fish products such as salted and dried salted fish, smoked fish, smoked flavoured fish, canned sardines and sardine-type products, fresh and frozen whole finfish. Elements of the SADC Protocol on Free Trade (SADC, 1996) have been extracted and elaborated upon. Some of the elements include elimination of barriers, elimination of import duties and export duties, non-tariff barriers, national treatment and customs procedures. Article 5 of the Protocol stipulates the simplification and harmonisation of customs procedures; member states shall develop a single customs document for all intra-SADC customs procedures for members that have ratified⁹ the Protocol.

⁹ Signing or giving formal consent to a contract, treaty or agreement making it officially valid. In this case, the single customs document will only be effective for member states who have given their formal consent.

Although the groundwork to facilitate the trade in fish has been put in place regionally and nationally, much still remains to be done in terms of harmonising standards and for member states, not only to include it in their trade policies but also to implement these standards. The elimination of barriers as well as import and export duties amongst member states of the SADC as stated in the Protocol does not tally with the reality on the ground. From the challenges highlighted by traders and shop owners in Chapter Four, border officials do not enforce the regulations that have been put on paper to facilitate the trade of fish. They tend to implement vigorous procedures that hinder rather than facilitate the trade and smooth flow of goods, specifically fish, into South Africa. Procedures such as long and tedious processes in acquiring import documents as well as the dismantling of traders' supplies at every point of inspection, which takes a long time to pack. In terms of weight restrictions enforced on traders, border officials do not implement standards according to Article 7 of the SADC Protocol on Trade (SADC, 1996). Article 7 states that members shall not apply any quantitative restrictions on imports from other states, except as otherwise provided for in this Protocol. Efforts to facilitate trade regionally and nationally will be in vain if member states do not take their roles seriously. Therefore, in terms of whether regional and national policies facilitate the trade of fish, the study concludes that these policies play a more hindering than facilitatory role.

The newly signed TFTA between COMESA, EAC and SADC presents a great opportunity to cover these new fish products that are imported from other African countries. Member states need to come to an agreement where these products are included in their food and hygiene standards, as well as to ensure that standards are implemented in importing and trading in fish.

5.2.3 Documents required to import and trade fish in South Africa

In line with regional agreements and national standards, there is a list of documents required by shop owners/traders to import and trade in fish as well as run a food premises. A list of general documents required for imports into South Africa as well as more specific documents required to import fish are also highlighted. An import permit was issued by the Department of Trade and Industry (DTI) accompanied by a letter from the country of origin indicating that the export of products are approved. Article 12 (Part 3) of the SADC Protocol (SADC, 1996) which talks about the rules of origin stipulates that, claims for acceptance of place of origin have to be supported by a certificate given by the exporting member state. In addition, the importing member state shall not prevent the goods from entering the country solely on the grounds of not providing a certificate, provided the goods are not subject to prohibition. Shop

owners and traders who travel to buy and import fish find it very difficult to acquire the certificate from the exporting country, especially if it is not their home country. It takes close to a month for the application to go through and the inspection to be completed before the certificate is issued. Shop owners and traders who do not get the certificate through the legal route bribe their way through the borders of the importing country, in this case South Africa.

According to the Hygiene Requirements Act 54 (1972), shop owners are required to have a Certificate of Acceptability for running food premises. Traders are required to display this certificate in a conspicuous manner in the shops for the information of the public. This was the case in most of the shops visited. Other documents required to run a food shop include a business registration permit and a tax clearance certificate. Overall, only five (25%) of the shop owners interviewed had the above documents. The other 15 shop owners had one or two of the three documents required to run their shops. Shop owners with bigger shops who are also involved in wholesaling had all the required documents in place, while most of the shop owners with smaller shops and fewer who imported food did not have all the required documents. Shop owners/wholesalers with bigger shops would record huge losses if they did not ensure that they had the required documents. This is because they buy wholesale and sell to other shop owners; not having all required documents to run their shops and import would mean closing the shop and losing huge amounts of money in the process. Shop owners/retailers would rather make sacrifices and go through the laborious procedure of acquiring documents or bribe their way through, than risk not being able to fully run their businesses, let alone being closed down.

5.3 Retail of imported fish in specialised shops

Specialised shops are run by foreign nationals from countries such as Zimbabwe, Zambia, Nigeria, DR Congo, Cameroon, Mozambique, Malawi and Rwanda. These shops are called specialised shops because most of the food items sold in these shops are imported from the countries listed above, for a specific consumer base. The consumer base for these specialised shops are more or less from the same countries listed above. South African nationals go to these shops to buy provisions such as rice, chicken and cooking oil. Generally, South Africans do not own or run such specialised food shops. This is because the specialised shops sell mostly food items from other African countries. It is also the reason why these are mostly owned and run by nationals from those countries. The owners of these specialised shops are familiar with what they are selling, as well as their consumer base. The specialised shops in the Cape Town Metropolitan area are clearly a unique invention by foreign nationals to cater for foreign

nationals. The exceptions found during the study was a South African sales girl who worked in one of the Nigerian-owned shops.

5.4 Routes used to get fish to Cape Town

One of the objectives of the study was to investigate the channels used for importation of fish and fish products into Cape Town. Three formal channels were identified, namely the Beit Bridge and Lebombo border posts as well as the Durban Port. Some shop owners and traders travel to the source countries to bring fish as well as other food items by bus, which are mainly destined for Johannesburg Park Station. From there, they connect using buses or trucks destined for Cape Town. Most of the fish from Malawi, Zambia, Zimbabwe and Mozambique is sold to retailers in Johannesburg around the Park Station area (Jimu, 2017). Thus, many retailers from Cape Town go to Johannesburg to buy fish for the shops from the wholesalers who bring the fish from the countries mentioned above. Some retailers in Cape Town congregate their orders together and use a truck owner to buy the fish for them from Johannesburg. A number of traders from Nigeria and Cameroon transport their order by sea using container vessels to Durban Port where these are then collected and transported by road to Cape Town.

Transportation is done by bus and/or cargo trucks because in the former case, most traders use passenger buses which are the most efficient way of travel within the region. Also, most of the informal traders that bring fish from the region are women practicing informal trade and who use passenger buses to bring in fish as passenger luggage. Secondly, it is cheaper to use trucks where these can be found as in most instances, these trucks are coming to South Africa mostly empty to collect imported goods from the sea ports in South Africa, which are the main channels for the import of goods for most of the land-locked countries in Southern Africa. In such cases, the arrangements to transport fish to South Africa using such trucks are made between the truck driver and the trader without the knowledge of the truck owner/company. Almost no fish is transported by air, except in cases where people are bringing in small quantities (less than 40kg as passenger luggage) using for example, cooler boxes, suitcases, etc. Other instances include students travelling from Nigeria and Cameroon who carry small amounts of fish for personal consumption. Transporting supplies by air would be very expensive in terms of covering costs and traders would barely be able to break even in terms of getting a profit. Only one informant said that he travelled by air between the DRC and South Africa to go and buy fish in the DRC, but his supplies were then transported by road.

Traders tended to resort to informal practices¹⁰ for importing their goods to avoid the long checks at the borders and also because they do not meet the requirements in terms of documents and baggage allowance. Informal practices afford traders the opportunity to import as many kilograms of supplies as they can possibly transport without being sanctioned. The reason why informal practices are used by traders even though they are transporting food for consumption is because weight restrictions are also applied to food. Therefore, there is a certain amount of weight they are allowed to bring into the country on one trip, which is 500kg of supplies. Anything above that is liable to a fine which must be paid at the borders. Note that 500kg also includes other food items, not just fish. These food items usually include beans, rice, groundnuts, cooking oil, maize meal, etc. Traders often resort to bribing border officers to get their excess goods through the borders rather than abandon them there or pay heavy fines and record losses. It is worth noting that the fines paid for not adhering to rules and bribes received, may not necessarily be paid into government coffers. They most likely always end up in the pockets of individual officials.

These practices are contrary to what is stated in Article 7 of the SADC Protocol on Trade (SADC, 1996) which states that quantitative restrictions shall not be applied on imports from member states, except as otherwise provided for in the Protocol. Article 14 also highlights trade facilitation at length. It states that members shall take all measures necessary to simplify and harmonise trade documentation and procedures. Article 15 emphasises the need for free transit trade. It further states that member states shall enjoy freedom of transit within the community and shall only be subject to payment of normal rates for services rendered. Therefore, border officials tend to carry out practices that do not reflect what is on paper thereby contributing greatly to hindering the trade of fish across borders, rather than play a facilitatory role.

5.5 Key costs incurred by shop owners and traders

Shop owners in the Cape Town Metropolitan area incur certain expenses in running their shops. Some of the key expenses include rentals, transportation and bribes paid to municipal officials. One shop owner pays R2500 a month for a shop he rents to sell his supplies. He buys his supplies from Johannesburg, so he pays an average sum of R1200 to transport them to Cape Town. Regarding transportation within Cape Town, he said that he spends R500 a week for

¹⁰ Practices such as travelling through different routes other than the formal borders to avoid weight restrictions.

errands such as buying supplies from other shop owners and paying bills. Bribes related to not having required documents could cost up to R1500 a month. All these costs ultimately amounted to R5700 for major expenses. Not forgetting that miscellaneous items may come up along the way, meaning the expenses for each month could be more or less than the above amount. This however, does not include their monthly income.¹¹

The above expenses raised uncertainties regarding the profitability of running a specialised food shop, as to whether shop owners make enough profits after all expenses to sustain themselves and their families. However, a key interviewee reported that he makes profit from the business and he intends to expand in the near future. As indicated, shop owners do not only sell fish and fish products in their shops. They also sell other food supplies such as rice, beans, palm oil, cooking oil, vegetables, cocoyams, sweet potatoes, plantains, etc. These other food items ensure diversity of products and improve the profitability of the business as a whole. Shop owners said that if they were to sell only fish in their shops, they would not be able to run profitable businesses.

5.6 The types and forms of fish imported into South Africa for sale in specialised shops

There is a variety of fish forms and species imported into Cape Town. Amongst this imported fish are mlamba, usipa, ndakala, kapenta, crayfish, stockfish and bitoyo (see Table 3). These are imported in a variety of forms such as smoked dried, salted dried and simply sun dried. These forms can be attributed to a number of reasons. Firstly, so that the fish can last longer in the case where they are not bought immediately by customers. For instance, it was indicated that the smoked dried calabash fish from Nigeria could last for six months without going bad, if well smoked. The heat and smoke from the fire keep the fish dry and strong, therefore it remains preserved for a longer period than when it is fresh. Salted dried fish can also last for very long periods, as salt is a powerful preservative for the fish and it keeps maggots and rodents away from the fish. Even then, smoked and salted fish is usually stored in the freezers because if it is stored outside for too long no one buys it.

Being able to preserve the fish for longer periods does not guarantee its suitability for human consumption. Consumers may buy fish that has been stored for very long periods without being aware of whether it is safe for consumption or not. It is also imperative that health officials take

¹¹ Wages after all expenses have been deducted.

note of such fish products or investigate their state routinely through sample testing since the fish is preserved for long periods before it is sold to consumers. The Foodstuff, Cosmetics and Disinfectants Act 54 of 1972, highlights that in the case of fish, samples should be taken from the shops and tests carried out to ensure that the fish is suitable for human consumption. If these tests were indeed carried out regularly, then there should be a follow-up on the results to determine the suitability of the fish for consumers. A course of action should be taken thereafter by health officials, depending on the results obtained. Article 16 of the Protocol emphasises the importance of maintaining a high level of safety according to international standards to protect the consumer's health. These are some of the concerns that emerged from interviews with government officials and shop owners, as well as analysing national and regional policies regarding how long it is safe to keep fish of various forms for consumption.

5.7 Consumer factors influencing attractiveness of imported fish

Imported fish is more expensive than local fish. The price differentials in fish were glaring from the table presented in the findings (see Table 3). For instance, imported stockfish sells for R300 per kilogram, which is ten times more expensive than the local mackerel, which sells for R30 per kilogram. The price differentials also apply to other food items in the shops. This is as a result of the added costs for importing the fish from countries outside South Africa into the Cape Town Metropolitan area. The costs of imported fish have to cover the numerous and high expenses that are incurred in undertaking this kind of business. Most of the fish that is imported is either dried, smoked or salted from the country of origin before being transported and sold to consumers in Cape Town. Most consumers preferred buying this imported fish from their home countries to local fish. The pull factor was that they chose to buy what they had been eating growing up or what they were more familiar with. Other customers said that certain dishes from their countries were cooked with a particular kind of fish, hence they can only use fish imported from their countries. For these consumers, the price was not a hindrance to buying the kind of fish familiar to them.

This is also closely linked to the reasons why most consumers buy their fish from shop owners who come from their own countries. For instance, Nigerians mostly buy their fish and food items from Nigerian shop owners, while Congolese would mostly visit and buy from Congolese shops. These shops specialise in fish and other items from particular countries depending on where the shop owner came from. For instance, a Cameroonian shop is mostly stocked with fish and food items from Cameroon and a few others from neighbouring countries. Therefore,

Cameroonians would generally buy from Cameroonian shops because they knew they would find their local delicacies. An exception arose when desired food items were not available, then consumers would go to other specialised shops to get what they needed. Nigeria and Cameroon share a lot in common especially in terms of food. Therefore, it is certain that if a Cameroonian did not find a particular food item in a Cameroonian shop, they would be likely to find it in a Nigerian food shop.

5.8 Packaging and display of fish sold in relation to sanitary and phytosanitary measures required in running specialised food shops

The pictures in Chapter Four show how fish is packed and displayed in the shops. Some of the fish had been packed in plastic bags (see Figures 1,2,3) and placed on the shelves while others had been placed on the shelves without plastic bags (see Figures 4,5,6). Packaging was done in different ways. Some fish like crayfish and kapenta were put in plastic bags of different sizes at varied prices. Other fish, especially the big species like the dried stockfish heads, salted dried bitoyo and smoked dried catfish were displayed on the shelves without plastic packaging. Other fish like sardines are canned. Stockfish heads were not displayed in a plastic bag because they come in large pieces, hence putting them in plastic bags would result in high breakages of the fish, resulting in less appreciation and willingness to buy among consumers. Another reason why some fish are not put in plastic bags is so that they are ventilated. The open display of fish exposes the fish to fresh air; it can therefore last for a longer period. If the fish is not properly ventilated, it becomes humid thereby attracting maggots and eventually getting rotten.

Fish like kapenta are put in small packages of R10 and R20 while crayfish is put in packages of R50. This is to enable consumers to buy according to their means. This is an indication of shop owners trying to cater for consumers from all income levels. The issue of the suitability of the fish for consumers is of concern here as the fish is exposed for long periods in the shops. Contamination can occur during that period of exposure whilst on display. The South African Standards for Display and Storage of Food in Section 8, Act 54 of 1972 (Foodstuffs, Cosmetics and Disinfectants Act), states that any shelf used for display or storing food or any container should be kept clean and free from dust or any impurity to avoid contamination, especially food which has not been wrapped. Most of the shop owners did not bother to dust or regularly clean the shelves where the uncovered fish was displayed. Dust could be seen on the surface of the shelves which contained fish and other exposed food items. In some cases, rats were seen

running around in the shops. If indeed Environmental Health officials enforced regular checks, then they must have come across such aspects. This therefore implies that some shop owners did not comply with the said standards for packaging and display of consumer food in the shops. If this is the case, then it is safe to assume that compulsory hygiene checks were not carried out at all, or not as often as the Environmental Health officials in Cape Town claimed.

Shop owners display fish in their shops in the same way it is displayed and sold in their countries of origin, through price haggling. For instance, in Cameroon crayfish is spread out on a mat and kept on shelves, in some cases it is put on the floor. In Nigeria, some of this fish is sold by hawkers on road sides where fish is spread on mats and placed on stools or on the floor. This fish is neither labelled nor packaged in any way; it is simply sold to consumers the way it is. This is the same way these shop owners and traders display and sell their fish in specialised shops, taking after practices in their own countries. If minimum standards have to be set for imported fish, then there is a need for member states to agree to develop these and harmonise the standards for all these products.

Government officials at Environmental Health Services of the Cape Town Municipality are responsible for carrying out regular inspections at all food premises to ensure continued compliance with food safety standards. The frequency of inspections is based on the standards of the premises and the risks associated with the products sold. That means that food shops that specialise in mostly perishable food items like fish would have more frequent inspections. Act 54 of 1972 (Foodstuff, Cosmetics and Disinfectant Act) states that food premises should be designed and equipped in such a manner that food can be handled hygienically and protected by the best available method from contamination. Some shop owners claimed that since the opening of their shops, they have never had a visit from a health inspector. On the other hand, officials from the City of Cape Town revealed that it is compulsory for all food premises to be inspected by Environmental Health officials at least twice a year. Health inspectors claimed that they carry out these inspections on all food premises, contrary to what some of the shop owners claimed, that their shops have never been inspected. If these standards are not met by shop owners, then the hygienic conditions under which fish, and other food items, are sold, are questionable.

In cases where these compulsory checks are carried out, there are certainly no specific standards that can be applied for the checks as most imported fish is not listed in South African

regulations. Therefore, shop owners cannot be sanctioned for not complying with hygiene standards that do not exist. Except where minimum standards have been set for the packaging and display of all fish including imported products, then shop owners who do not comply with those minimum standards, could be sanctioned accordingly. It is therefore evident that standards and requirements guiding the handling and display of foodstuff (Act 54 of 1972) is not implemented on the ground. Good practices could be drawn from the EU food safety policy, according to the literature reviewed in Chapter Two. Compulsory food checks ought to be carried out throughout the entire value chain (from boat to plate), making sure that fish is of a high quality and appropriate for human consumption. In the European Union, strict rules are enforced throughout the food chain and as a result, EU citizens benefit from one of the highest food safety standards in the world. The SADC countries will need to move towards similar levels of standards and enforcement of these.

5.9 Conclusion

This chapter discussed the results of the study, applying the facilitatory role of regional trade agreements *vis-a-vis* South African national standards regarding importing fish and steps taken in harmonising fish standards in the SADC region. There is a link between the challenges faced by fish traders and shop owners and the policies that are meant to facilitate the trade in fish. As a result of these policies and standards not being implemented effectively, traders and shop owners are hindered from fully reaping the benefits of this trade which is a source of income for them. The goal of reducing poverty through fish trade will not be achieved unless traders and shop owners are able to reap the benefits of regional trade agreements and local South African standards.

The chapter also discussed the types and forms of fish imported and considered the reasons why the fish is brought into South Africa in these different forms as well as the reasons why certain routes are used to transport fish into South Africa and then to Cape Town. Fish imported from other countries is mostly not included in South African standards specifications hence regular inspections cannot be effectively carried out on specialised shops, which means that Sanitary and Phytosanitary Standards are not being upheld by these shops.

It is evident from these discussions that there is a need for the harmonisation of regional policies as well as specifications and standards regarding fish. Although the groundwork for harmonising fish standards in the SADC region has been set, member states still have a big

role to play in making sure standards are effectively implemented in their respective countries since they have been ratified. Differences in policy preferences, different interests and the quest for national sovereignty among member states present a hindrance to the effective implementation of trade agreements. Chapter Six will present insights on discussions from this chapter as well as concluding remarks and recommendations for possible policy reforms.



6 CHAPTER SIX

CONCLUSIONS AND RECOMMENDATIONS

6.1 Introduction

Initiatives and interventions have been carried out, and some are underway to promote and boost fish trade especially intra-regional trade in sub-Saharan Africa, in order to contribute to sustainable economic growth and poverty alleviation as well as food and nutrition security. So far, national and regional policies on intra-regional trade as a whole have been put in place to facilitate the movement of goods between countries. Even then, Africa still faces challenges in enhancing fish trade. The study has outlined some of the challenges at the regional level as well as the national level in terms of cross-border and retail fish trade.

The study deliberated on the themes that emerged from the findings against the policies that have been put in place. The study evaluated the policies and legislation by asking how these facilitate or hinder the trade of fish across borders for traders and retail trade for shop owners.

This chapter is organised into three sections. The first section provides insights on key findings from the study. In the second section, concluding remarks are presented in relation to the study objectives and the main research question. The study proposes possible lessons to be drawn from the integration process in the EU and provides recommendations based on the study findings in the last section.

6.2 Insights derived from the study

A large number of policies to boost the trade in fish regionally already exist. The SADC Protocol on Free Trade (SADC, 1996) provides a framework for enhancing SADC intra-regional trade and the SADC Protocol on Fisheries (SADC, 2006) aims to provide for the elimination of all import and export duties as well as all non-tariff barriers to intra-regional fish trade. Regardless of all the existing policies and regional agreements to promote intra-regional fish trade, there is no effective implementation and monitoring of these policies and agreements on the ground. Member states do not have a common approach to ensure agreements are implemented and standards are maintained. Coordination and harmonisation of policies and agreements at country and regional levels would go a long way in boosting cross-border fish trade and alleviating the problems that plague the international fish trade and negatively impact people who are trying to earn a living from this economic activity. Although SADC standards

and WorldFish Center are currently working on a document on proposed fish technical standards for harmonisation in the SADC region, this is still a long way from fruition since it is still at project proposal stage. Mechanisms for implementing and enforcing these standards as well as the stipulations of the SADC Protocol on Trade will need to be domesticated and operationalised by all member states. This means the NRCS will have to include imported fish and fish products on its list for standards and specifications. Although it may take a long time for member states to harmonise, domesticate and operationalise standards in their respective countries, there is at least hope that intra-regional trade could be enhanced once these are in place.

This study has shown that traders use both formal and informal routes to import fish into South Africa, as well as documentation of all such imports. Formal routes include importing fish through the Beit Bridge and Lebombo borders, as well as the Durban port. Using these formal channels is complex and time consuming in terms of numerous police checkpoints, laborious procedures and bribery of officials, which adds to traders' transaction costs. Hence, most traders avoid these formal channels in favour of informal channels to evade these procedures and extra costs. One major reason that traders use informal channels, is so that they can evade the limit on volume of goods that they are legally allowed to import into South Africa, tax-free per trip. Informal routes are also used to avoid paying bribes to border officials. Policies, standards and regulations will need to be formulated in a way that could promote intra-regional fish trade including their effective implementation. The need for using informal routes could decrease if border procedures were not laborious and time consuming. This is particularly the case regarding the import of highly perishable food such as fish whereby member states need to ensure that consumers are eating fish that is fit for human consumption and is handled hygienically throughout the value chain.

Sizeable amounts of fish are imported into Cape Town from other countries. Fish is imported in different forms such as smoked dried, salted dried, sun dried and salted. These different forms ensure that fish is easily transported from one country to the other and that it can last for long periods. However, preserving fish for long periods does not guarantee its suitability for consumption. It is therefore imperative that health officials carry out regular inspections to ensure that fish in specialised shops are in a good condition for consumption. They should go as far as taking fish samples for testing to ensure high food standards and consumer safety. If

both health officials and shop owners comply with existing fish standards and specifications, consumer health safety will be assured.

Fish is also packaged and displayed in different ways in the shops depending on the size, type and form of the fish. Most methods of packing and displaying fish reflect what is happening and practiced back home in most of the source countries. Fish is also put into packages of different sizes which are sold at different prices. This is done so that consumers are able to buy according to their means. Most shop owners package and display their fish in their shops just the way it is done in their home countries, by hawkers and traders. However, standards and specifications will have to be harmonised in a way that is inclusive of all these different fish forms from other countries as well as the way they are packaged and displayed, but based on minimum South African or SADC standards (where these are applicable) and also international best practices for food safety and hygiene.

Imported fish is more expensive than local fish. This is as a result of added costs for importing the fish from countries outside South Africa into the Cape Town Metropolitan area. Consumers preferred buying this imported fish from their home countries because they are more familiar with the fish and they had been eating the fish while growing up. Other consumers use imported fish to cook certain meals which can only be prepared with fish from their home countries. The price of the fish was not a deterrent for these consumers. This was also closely linked to the reasons why most consumers buy their fish from shop owners who come from their own countries. Nigerians would mostly buy fish from Nigerian shops while Congolese consumers will generally buy fish from a Congolese shop owner. These shops are usually stocked with fish and other food items from the respective countries of the shop owners, hence the reason why the shops attract consumers from the same country.

Specialised shops are run by foreign nationals from countries outside South Africa. These shops are called specialised shops because most of the food items sold in the shops are imported from other countries such as Cameroon, Zimbabwe, Zambia, DRC, Malawi and Nigeria. The trade of fish in specialised shops is a unique practice. This is because they target foreigners who know and understand the kind of fish they sell as they grew up eating it. The consumer base has more or less the same nationalities as the shop owners. South Africans go to specialised shops to buy provisions such as rice, chicken, tomatoes, cooking oil and potatoes.

Generally, South Africans do not run specialised food shops because these sell mostly food from other African countries, which they are not familiar with.

Running specialised shops is a business that generates profits for shop owners and traders. Despite all the costs incurred for rentals, transportation, bribes and other miscellaneous costs, shop owners appear to make some gain from it at the end of the day, to continue with the ventures. If it was not the case then most of them would not be continuing or even planning on expanding their businesses. The specialised shops do not sell only fish. They sell other food supplies, which help to boost the profitability of the business. Owning and running a specialised shop is a means of livelihood and source of income, and probably one of the lucrative economic activities for the migrant communities in South Africa. The trade further contributes to economic growth through employment for both local and foreign nationals and also the fishers and traders from the source countries of the fish. Given that Sub-Saharan Africa is one of the poorest and most food insecure regions of the world, increased consumption of fish contributes significantly to food and nutrition security. Thus, cross-border trade provides for significant social and economic gains for the traders, shop owners as well as consumers.

6.3 Possible lessons to be drawn from regional integration in the EU

The EU is one of the best examples of regional economic political integration, with free trade within its common market being the hallmarks of its integration. The region has experienced periods of crisis such as the Eurozone crisis, which prompted the economic integration between the European Union and the Eurozone. This union brought to light the European principle which states that it is a lot harder to integrate than to disintegrate. Externally, the EU has exhibited a track record of reliability and stability with its economic partners, both within the EU and globally. In all, the literature reviewed suggests that the EU has greatly evolved after its sovereign debt crisis. As a result, it is a more integrated single market now than ever, especially through its banking union.

This study has attempted to draw lessons from the EU economic integration, in particular how this underlays cross-border trade and product standards within the common market, for Southern African regional trade based in regional trade agreements that act as the basis for economic integration. Regional groupings such as the SADC and its SADC Protocol on Free Trade (SADC, 1996) could emulate some aspects of integration from the EU. Some of the key aspects that could provide lessons are for example, domestication of EU legislation,

harmonisation of product standards and strict enforcement of these policies and standards across the Eurozone. In addition, the SADC and other African RECs should start by prioritising trade within the RECs and then with each other at Africa level as a move towards development of the continental free trade under the proposed African Economic Community. Regional groupings will need to increase and strengthen intra-REC trade and inter-REC trade if Africa is to start closing the economic gap with other continental bodies and also use such economic integration for increased political and economic stability.

6.4 Concluding remarks

This study set out to achieve the following main objective: to investigate whether regional trade agreements and national standards facilitate or hinder the trade of fish across borders. It also investigated the routes used to import fish into South Africa as well as the types, forms and species of fish imported. Consumer factors influencing attractiveness of imported fish was central to discussions in this study as well as the reason why imported fish is packaged and displayed the way it is in the shops. The main question was to find out what constraints and opportunities shop owners and fish traders faced in importing fish into South Africa and selling it locally.

The study investigated how fish is imported for sale in the Cape Town Metropolitan area, what kind of fish is imported, who imports the fish and who buys the fish. In addition, the study interrogated what legal and food standards documentation are required to sell fish in the Cape Town Metropolitan area and what kind of policies and legislation have been put in place (or have to be put in place) for this kind of trade to thrive. The focal point of this study was to investigate the constraints that shop owners/traders face in doing this trade. The study found that there were a number of challenges faced by these shop owners and traders, and that there were loopholes in the existing policies and legislation that would need to be rectified to facilitate and enhance trade in imported fish within the Cape Town Metropolitan area. Based on the findings of the study, a number of recommendations, which could feed into regional and national policies and legislation regarding cross-border and retail fish trade are proposed.

6.5 Recommendations

6.5.1 Regional and national policies and standards on free trade need to be harmonised

All SADC member states that are trading in fish as revealed under this study, (South Africa, Malawi, DRC, Mozambique, Zambia and Zimbabwe) are signatories of the SADC Protocol on Free Trade (SADC, 1996). Although member states have ratified the treaty (only the DRC has not ratified the treaty), findings of this study show that member states do not adhere to the provisions of the treaty. Therefore, there is a need to ensure that member states do not just sign and ratify agreements but ensure that these are domesticated and operationalised in their respective countries.

6.5.2 Simplification of procedures for acquiring documents for running shops

The procedures to acquire documents required to run a fish shop nationally (in South Africa) need to be simplified. Municipalities need to come up with a more simplified way for shop owners to obtain the documents they need to run their shops. It takes over a month for shop owners in the Cape Town Metropolitan area to apply for a business licence, and several more weeks for inspections and re-inspections before the licence is granted, not to mention the other documents required.

6.5.3 Inclusion of standards for handling of all forms of fish and fish products

Currently, some of the fish and fish products form that are being imported into South Africa are not included on national legislation. National and regional standards and specifications for handling of all fish and fish products should be updated to cover fish types and forms from all importing and exporting countries. This would enable health officials to carry out their inspections effectively, to ensure that maximum hygiene standards are upheld.

6.5.4 Contamination of fish through poor handling

The handling of fish throughout the value chain needs to be improved. For example, the handling of unpackaged fish by consumers may cause contamination, that is, some consumers hold unpackaged fish with their bare hands, which they end up not buying. To avoid contamination, consumers should be provided with gloves in cases where they handle different fish before making a choice of what fish to buy. Equally, hygiene practices should be strengthened throughout the value chain.

6.5.5 Restrictions on quantity of imports

Quantitative restrictions (500 kilograms per trip, per importer) applied at the borders are a hindrance to cross-border trade. Article 7 of the SADC Protocol (SADC, 1996) prohibits quantitative restrictions on imports from other member states, except as otherwise stated in the Protocol. Border officials should ensure that this policy is effectively implemented to allow for the free movement of goods across borders.

6.5.6 Improved functioning of border infrastructure and personnel

Border infrastructure such as testing laboratories, and processes need to be improved to curb the demand of bribes by officials. There is a need to set up structures that do not promote bribery and corruption at border posts. In addition, there is shortage of staff in the various departments concerned with facilitating import and export of food items at the border. There is a need therefore to boost the required and adequately skilled staff at the borders. Traders should be able to maximise the profits gotten from importing and selling fish locally, rather than making losses through additional costs.

6.5.7 Simplification of border procedures

Long and laborious border procedures hinder the movement of people and goods across borders. Article 15 of the SADC Protocol (SADC, 1996) allows for the free movement of goods and people within the community, only subject to the payment of normal rates for services rendered. Time consuming border procedures should be replaced with one-stop border posts and free movement of goods as stated in the Protocol. Initiatives such as the Chirundu one-stop border post between Zambia and Zimbabwe should be implemented across the region and eventually continent-wide. Since implemented in 2009, the Chirundu one-stop border post has been hailed as a notable success and an important step towards greater integration in the SADC region.

6.5.8 Monitoring and enforcement of regional agreements and treaties

National and regional monitoring and evaluation structures should be created to measure the effectiveness of regional treaties and agreements and policies on the ground and whether these have been domesticated and are being operationalised. Such a unit should also assist member states in the implementation of such agreements and policies rather than only policing and enforcing these. In addition, follow up mechanisms would go a long way in ensuring that what

is on paper is implemented on the ground in terms of importing and selling fish regionally, nationally and locally.

6.5.9 Improved documentation of informal cross-border trade

Informal cross-border traders should be viewed as a partner and contributor to the economy. There is a need to improve documentation of the volume and importance of the informal fish trade. Also, this type of trade should be properly acknowledged in policy-making platforms. Ways should be found in facilitating informal trade rather trying to kill it since it is the largest sector in the region. It is only when informal traders gain confidence in the formal structures and there is adequate provision of appropriate infrastructures that informal traders will formalise their activities.

6.5.10 Raising awareness and organisation

Awareness should be raised among shop owners and traders about the SADC Protocol and how the Protocol protects their activities. There is a need for shop owners and traders to organise themselves into associations and unions that can engage with national governments and push for their rights in the trade activities they carry out. Traders should raise these issues with the authorities concerned in their home countries. This would enable negotiations between South Africa and concerned countries, around trade facilitation at the borders and the retail sector in the Cape Town Metropolitan areas.

6.5.11 Recognition of shop owners as investors

Member states from where the shop owners of the specialised shops originate, should negotiate with South Africa around legalising shop owners and traders as investors/business people using existing legislation. After all, South African supermarkets such as Shoprite, Game and Pick & Pay are establishing their activities in these other countries as investors. Rules and regulations around investment (for example, minimum levels of size of investment for recognition as an investor) and trade permits should be flexible for these shop owners, especially since most are from SADC and should be covered, particularly under the SADC Protocol. Reduced thresholds for qualification as investors would go a long way in facilitating and legalising the activities of the shop owners.

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LIST OF APPENDICES

Appendix A: List of interviewees

Dates interviewed	Location of shop	Name of shop	Shop owner/Nationality	Contact details
2/5/2016	Maitland	African shop	Mrs Chimene Forbi. Cameroon	N/A
19/5/2016	Bellville	J. Marlene trading cc.	Mr Ojong Bernard. Cameroon	0834035654
19/5/2016	Bellville	Blessing African food and spices	Mrs Blessing. Nigeria	0717631129
19/5/2016	Bellville	Food and spices	Mr Emeka. Nigeria	N/A
20/5/2016	Parow	African spices	Mr Fidelis. Cameroon	N/A
20/5/2016	Parow	Grace Africa shop	Mr Victor. Nigeria	0827934595
20/5/2016	Parow	Aruza pro limited	Mr Emmanuel and Irene Lubasa. Congo and Zambia	0796388252
27/5/2016	Parow	Chez Papa Alain	Alain Kazadi. Congo	0717631128
27/5/2016	Parow	Food shop	Mantobi Asemota. South Africa	N/A
2/6/2016	Maitland	African raw organic food	Mugabe. Cameroon	0717241348
2/6/2016	Maitland	Bibiche shop	Madame Bibiche. Congo	N/A
7/6/2016	Maitland	Sobem African food spices	Elias Aka. Nigeria	0824791083
7/6/2016	Maitland	K.milungu	Cecile Milungu	N/A
3/8/2016	Salt River	Super gambela shop	Derrick. Nigeria	0823111143
4/8/2016	Salt River	Gilbert fish and eggs	Josephine Ndayambaje. Rwanda	0730833852
4/8/2016	Salt River	Kamu la fraicheur	Mr Kamu. Congo	0766686938
Government Officials				
Date of interview	Location	Name of official	Name of office	Contact number
23/5/2016	Stellenbosch	F. Endemann	DAFF	0748700522
23/5/2016	Stellenbosch	Thabo Sefike	DAFF	0218285102
13/2/2017	Cape Town	Anonymous	City of Cape Town	N/A

13/2/2017	Mitchell's Plain	Anonymous	City of Cape Town	N/A
13/2/2017	Mitchell's Plain	Anonymous	City of Cape Town	N/A



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Appendix B: List of other products and food items sold in the shops

Name of shop	Other food items sold in the shops
J.Marlene trading cc.	Rice, beans, plantains, bananas, okra, soft drinks, palm oil, Maggi cubes, garri, Kanda (cow skin)
Blessing African food and spices.	Garri, semolina, maize meal, pounded yam powder, rice, plantains, kanda (cow skin)
Grace Africa shop	Garri, semolina, pounded yam, eru, ogbono, ground egusi, Maggi cubes, palm oil, groundnuts, plantains, scented rice
Aruza pro limited	Groundnuts, beans, pepper, Maggi cubes, butter nuts, barbeque spices, dried caterpillar
Alain Kazadi. Congo	Eru, frozen chicken, Maggi cubes, African spices and condiments
Food shop Ltd	Cocoyams, okra, Maggi cubes, bananas, maize meal

African raw organic food	Garri, plantains, bananas, sardines
Sobem African food spices	Garri, okra, beverages, pounded yam powder, semolina, maize meal, Maggi cubes, plantains
K.milungu	Beans, scented rice, cooking oil, fresh pepper, assorted vegetables
Super gambela shop	Smoked chicken, fragrant rice, pounded yam powder, maize meal, plantains, frozen chicken, a variety of beans, palm oil, green spices, ginger, garlic
Gilbert fish and eggs	Eggs, tinned tomatoes, sunflower cooking oil, groundnuts, spaghetti, chicken and fish spices, peanut butter, salt, Maggi cubes
Kamu la fraicheur	Tinned tomatoes, eru, garri, bottled water, fragrant rice, maize meal, baking flour, beans, kitchen utensils, cleaning detergents, fish and chicken spices and ingredients, canned baked beans

Appendix C: Pictures of other items sold in specialised food shops



Figure 16: Taken in Salt River. August 4 2016.



Figure 17: Taken in Salt River. August 4 2016.



Figure 18: Taken in Maitland. August 3 2016.

Appendix D: Other pictures of fish sold in the shops



Figure 19: Unpackaged and unlabelled smoked tilapia taken in Parow. May 20 2016.



Figure 20: Frozen maasbanker in a deep freezer taken in Parow. May 20 2016.



Figure 21: Packaged and unlabelled small pieces of smoked dried catfish. Displayed on a shelf. Taken in Bellville (2016).



Figure 22: Smoked catfish and sun dried tilapia openly displayed on shelf. Taken in Bellville (2016).



Figure 23: Dried salted tilapia fish held by shop owner. Taken in Bellville (2016).



Figure 24: Frozen panga in a deep freezer. Local fish taken in Salt River (2016).



Figure 25: A big piece of packaged and labelled catfish. Taken at Bellville (2016).