



## KENYA FISH MARKETING AUTHORITY

### NATIONAL FISHMARKETING STRATEGY

FINAL DRAFT

2021 – 2030

## FOREWORD

Kenya Fish Marketing Authority's mandate provides for the marketing of fish and fishery products from Kenya to ensure fish and fish products from Kenya enjoy premium market access. The fisheries sub-sector plays an important role in the economic and social development of our Country. The sub-sector has the potential to be a major contributor to the Gross Domestic Product of the Country, however it has not been fully exploited.

The sub-sector registered a growth in Gross Value Added of 9.1 per cent to stand at Kshs 62.8 billion during the period under review (Economic review 2021). It contributes to income generation, livelihood improvement and creation of employment along the value chains. In 2020, 8,418.3 metric tons of fish and fish products were exported from Kenya.

According to the economic survey 2021, the sub-sector registered a slight improvement in performance in the review period with the total value of fish landed increasing from Kshs 23.6 billion in 2019 to Kshs 26.2 billion in 2020, largely attributed to an increase of Kshs 1.9 billion in the value of freshwater fish landed.

Total quantity of fish landed increased by 0.5 thousand metric tons from 149.2 thousand metric tons in 2019 to 149.7 thousand metric tons in 2020 partly owing to measures aimed at encouraging optimal exploitation of fishery products.

The quantity of fish landed from freshwater sources increased by 2.0 per cent in the review period. However, fish landings from marine sources declined by 7.2 per cent in the year 2020. Fish output from fish farming increased by 7.6 per cent from 18.5 thousand tons in 2019 to 19.9 thousand tons in 2020. This accounted for 16.1 per cent of total fish production from fresh water sources and 13.3 percent of total fish landings in the country. The sector earned the country approximately Kenya Shillings 2.7 billion in 2020 of foreign exchange and employs 500,000 people directly.

A number of challenges have been identified that hinder market development in the fisheries sub-sector. These include; limited supply of fish and fishery products to meet market demand, low value addition initiatives, low quantities of fish traded locally and internationally, low per capita fish consumption in the country, limited application of Market Information Systems in fish marketing, inadequate infrastructure for harvesting, handling and marketing of fish and fisheries products, and unequal distribution of gains along the value chains.

This strategy seeks to support increased supply of fish and fisheries products from 149.7 Metric Tons (Economic survey 2021), to 450,000 MT, reduce post-harvest loss on fish and fisheries products from 30% to 10%, increase quantities of fish sold in the local and international markets, reduce fish product interception due to non-compliance or unfair trade practices, increase per capita fish consumption from the current national average of 4.5kg to 10kg by 2029.

Additionally, improve application of MIS in fish and fish product market development, enhance technical capacity and skills among staff and value chain actors, enhance access to financial services and insurance products for fish marketing, improve access to relevant fisheries marketing infrastructure at strategic points, and promote sustainable distribution of gains among fisheries value chain members.

The strategy aims at improving local and international market access through promotion of competitiveness of Kenyan fish and fisheries products. The promotional and strategic aspects such as market research, product design and development, fish marketing infrastructural support, reduced chain losses, initiating partnerships for market development, promoting information sharing, traceability, certification schemes and implementation of market policies.

In line with the Constitution, the strategy will be implemented in collaboration with the agencies in national government, the county governments and other stakeholders. For effective implementation of the strategy, the Board is committed to mobilizing resources and strengthening partnerships in its implementation. To ensure ecological integrity, sustainability and maximum benefits from the enormous fisheries and aquaculture resources, I wish to pledge my commitment towards implementation of the strategy.

**Hon. Martin Ogindo,**  
**Chairman,**  
**Board of Directors**

## PREFACE

The National Fish Marketing Strategy 2021-2030 was prepared in line with the Constitution and the Country's long-term development blueprint the Kenya Vision 2030, which aims to provide improved quality of life to all by 2030 through transformation of Kenya into a newly industrialized, middle-income country.

The strategy is aligned to the United Nations Sustainable Development Goals, African Union Agenda 2063, in particular the Comprehensive African Agricultural Development Programme and Policy Framework and Reform Strategy for Fisheries and Aquaculture, international/ regional conventions and agreements. The strategy provides a framework for the marketing of fish and fishery products. It highlights the issues affecting marketing of fish and fishery products in the country and outlines strategic objectives and interventions for implementation.

The preparation of this Marketing Strategy involved consultations with internal and external stakeholders. The internal stakeholders are the State Department for the Blue Economy and Fisheries, Kenya Fisheries Service, Kenya Marine and Fisheries Research Institute, Fish Levy Trust Fund, and Kenya Fishing Industries Corporation. The external stakeholders consulted include, Ministries, Departments, Agencies, County Governments (MDACAs), Fisheries Associations, development partners and Civil Society organizations involved in the sector.

I wish to register my special gratitude to the Board of Directors and the staff of Kenya Fish Marketing Authority for their commitment and effort that made the preparation of the plan successful. I also wish to thank the top management of the Ministry of Mining, Blue Economy and Maritime Affairs for the valuable input and support in the entire process of development of the plan.

Special thanks go to the Cabinet Secretary Hon. Hassan Joho, EGH for providing policy direction.

It is my hope that successful implementation of this Strategy will contribute to enhanced marketing of fish and fishery products for socioeconomic development of the Country.

**M/S Betsy Muthoni Njagi**  
**Principal Secretary,**  
**State Department of the Blue Economy and Fisheries**

## ACKNOWLEDGEMENT

The development of the National Fish Marketing Strategy would not have been possible without the support of the top management of the State Department for the Blue Economy and Fisheries, led by the Principal Secretary, M/S Betsy Muthoni Njagi, (CBS) who has consistently shown great enthusiasm in making sure that the Authority achieves its mandate.

The direction and encouragement from the KFMA Board of Directors led by Hon. Martin Ogindo is highly appreciated.

The role played by the stakeholders: State Department for the Blue Economy and Fisheries, State Department for Micro, Small and Medium Enterprises (MSME) Development, the County Governments, Kenya Marine Fisheries Research Institute (Kenya Marine and Fisheries Research Institute (KMFRI)), Kenya Fisheries Service (KeFS), Kenya Fishing Industries Cooperation (KFIC), and Kenya Fish Marketing Authority (KFMA) deserves a special mention.

Finally, we would like to recognize the efforts put by my predecessors, Ms. Jane Kibwage, Mr. Albert Mwangi and Mr. Samuel Onyango with the Joint Agriculture Secretariat (JAS) and the Technical Working Group comprising of Mr. Rodrick Kundu, Dr. Davies Makila, Mr. Ombicha Samuel, Ms. Roseline Mumbo, Mr. Nicholas Kagundu, Ms. Lilian Nduti, Mr. Hassan Pakia and Ms. Eunice Omollo for their commitment in spearheading the development of this strategy.

As it is not possible to mention everyone and every institution individually, kindly take this acknowledgement as an expression of my sincere gratitude.

**Charles Ogwang**

**Ag. Chief Executive Officer**

**Kenya Fish Marketing Authority**

## EXECUTIVE SUMMARY

Kenya's opportunity to increase her local and export trade in fish and fisheries products depends on the ability to take advantage of the huge market potential in the domestic and in regions such as; USA, Japan, China, Middle East, UAE, Qatar, EAC and COMESA. The annual market size of fish and fish products in these countries and regions is estimated at USD 71 billion. In the domestic market, Kenya average per-capita fish consumption is estimated at 4.5 Kgs against the African Average of 10Kgs and global average of 20Kgs.

Previous Government interventions were focused on increasing the total quantity of fish and fisheries products supplied. They included developing skills in aquaculture, putting up processing plants and purchasing vessels for deep sea capture among others. Other interventions helped raise the total quantity of fish landed from 146, 543 MT with a value of Ksh. 23.7 billion in 2019 to 149,722 metric tons in 2020 with a value of Ksh 26.25 billion.

This still cannot meet the huge deficit in supply brought about by worldwide environmental and health concerns that has led to observable consumption shifts towards healthy and easy to cook sources of protein like fish, cultural changes and population increase.

Fish exports have been on a steady decline in the last 10 years with a high of 36,368 MT in 2006 with an estimated value of Kshs. 5 billion to a low of 8,387MT in 2020 valued at Kshs. 2.7. This is against a steady rise in fish imports which have seen steady increase over the last 10 years from 30MT in 2005 with an estimated value of Kshs. 20 million to 5,853MT in 2014 with an estimated value of Kshs. 640 million and growing to 19,892 MT valued at over 2.5 billion in 2020.

This has attracted different interpretations from scholars. Examples of such interpretations are (a) Kenyan fish is in low supply therefore highly priced so Kenyans cannot afford it; (b) Due to uncoordinated marketing systems, Kenyans cannot access fish, yet the trading of imported fish is well organized and affordable by the majority of the population. Through the surveys indicated in the strategy, the current situation will be analyzed and acted upon with reliable data.

The desired goal of the strategy is to create an enabling environment for improving efficiency in fish markets and marketing. To implement the interventions suggested, approximately Kshs. 3.2 billion will be required per year over the next 10 years. The National Government, County Governments, private sector investors and Ector beneficiaries will share the cost and the benefits.

# TABLE OF CONTENTS

FOREWORD.....	i
PREFACE .....	iii
ACKNOWLEDGEMENT .....	iv
EXECUTIVE SUMMARY.....	v
ABBREVIATIONS & ACRONYMS .....	viii
DEFINITION OF TERMS .....	ix
1 INTRODUCTION .....	1
1.1 Background Information.....	2
1.2 Rationale for Fish Marketing Strategy development .....	5
1.3 The Process of Strategy Development.....	6
1.4 Scope of the Strategy .....	6
1.5 Guiding Values and Principles.....	7
2 SITUATIONAL ANALYSIS .....	8
2.1 Introduction.....	9
2.2 Fish Production and Supply to the Market .....	9
2.2.1 Global Fish Supply to the market	9
2.2.2 Fish Production and Supply in Africa	10
2.2.3 East Africa Fish Production and Supply	10
2.3 Marketing of Fish and Fishery Products.....	16
2.3.1 Global and Regional Marketing Situation	16
2.3.2 Kenyan Fish and Fisheries' Products Domestic Market Situation	17
2.4 Consumption of Fish and Fishery Products .....	18
2.4.1 Quantities Consumed Globally and Locally	18
2.4.2 Consumption Trends Behaviors and Attitude in Kenya	19
2.5 Value Addition and Processing of Fish and Fisheries Products .....	20
2.5.1 Processing and Value Addition Challenges in Kenya	20
2.6 Fishing Infrastructure in Kenya.....	21
2.7 Institutional, Policy and Legal Framework Analysis.....	22
2.7.1 Global, Regional and Domestic Legal and Institutional Challenges	23
2.8 Cross Cutting Issues Affecting Supply and Marketing of Fish and Fish Products .....	25
2.8.1 Gender Inequality	25
2.8.2 Incidence of HIV and AIDS and COVID 19	25
2.8.3 Climate change	25
2.8.4 Environmental concerns	26
2.8.5 Cross border conflicts.	26
2.9 PESTEL Analysis .....	27

2.10	SWOT Analysis .....	31
2.11	Summary of strategic issues.....	33
3	<b>STRATEGIC ISSUES, OBJECTIVES AND INTERVENTIONS /ACTIVITIES .....</b>	<b>34</b>
3.1	Introduction.....	35
3.2	Vision and Mission of the Strategy.....	35
3.2.1	Vision:35	
3.2.2	Mission: 35	
3.3	Strategic Issues, Objectives and Interventions .....	35
4	<b>INSTITUTIONAL AND LEGAL FRAMEWORK .....</b>	<b>Error! Bookmark not defined.</b>
4.1	Introduction.....	47
4.2	Fish marketing Partners and Collaborators.....	47
4.3	Partners and their Roles and Mandates .....	48
5	<b>IMPLEMENTATION FRAMEWORK .....</b>	<b>Error! Bookmark not defined.</b>
5.1	Implementation Plan Matrix.....	56
6	<b>MONITORING AND EVALUATION FRAMEWORK.....</b>	<b>79</b>
6.1	Monitoring and Evaluation (M&E).....	80
6.2	Communication .....	80
6.3	Risks and Mitigation Measures .....	80
6.4	Financing Mechanism.....	81
7	<b>ANNEXES.....</b>	<b>82</b>
7.1	Annex 1: Strategy Formulation Process .....	<b>Error! Bookmark not defined.</b>



## ABBREVIATIONS & ACRONYMS

<b>AAK</b>	Aquaculture Association of Kenya
<b>AfCFTA</b>	African Continental Free Trade Area
<b>AFIPEK</b>	Kenya Fish Processors and Exporters Association
<b>AU</b>	African Union
<b>CAADP</b>	Comprehensive African Agricultural Development Programme,
<b>CASK</b>	Commercial Aquaculture Society of Kenya
<b>COMESA</b>	Common Market for East and Southern Africa
<b>EAC</b>	East Africa Community
<b>FLTF</b>	Fish Levy Trust Fund
<b>HIV/AIDS</b>	Human Immunodeficiency Virus and Acquired Immune Deficiency Syndrome
<b>IUU</b>	Illegal, Unreported and Unregulated
<b>KeFS</b>	Kenya Fisheries Service
<b>KenTrade</b>	Kenya Trade Network Agency
<b>KFMA</b>	Kenya Fish Marketing Authority
<b>KMFRI</b>	Kenya Marine and Fisheries Research Institute
<b>KRA</b>	Kenya Revenue Authority
<b>Kshs</b>	Kenya Shillings
<b>M&amp;E</b>	Monitoring and Evaluation
<b>MIS</b>	Management Information System
<b>NTB</b>	Non-Tariff Barriers
<b>PES TEL</b>	Political, Economic, Social, Technological, Environmental and Legal
<b>SDF A&amp;B</b>	State Department for Fisheries and the Blue Economy
<b>SDG</b>	Sustainable Development Goals
<b>SWOT</b>	Strengths, Weaknesses, Opportunities and Threats
<b>TBT</b>	Technical Barriers to Trade
<b>WTO</b>	World Trade Organization
<b>WAK</b>	Wavuvi Association of Kenya

---

## DEFINITION OF TERMS

### **Aquaculture**

The cultivation, propagation, or farming of aquatic organisms, including fish, mollusks, crustaceans, and aquatic plants whether from eggs, spawn, spat, seed or other means or by rearing fish lawfully taken from the wild or lawfully imported into Kenya, or by other similar process.

### **Beach Management Unit (BMU)**

An organization of fishers, fish traders, boat owners, fish processors and other beach stakeholders who traditionally depend on fisheries activities for their livelihoods.

### **Dealing in fish**

Includes collecting, transporting, storing, transshipping, buying, or selling fish or fish products for purposes of trade.

### **e-Business**

Using technology to conduct business activities such as recruitment, meetings, processing, and accounting.

### **Fish**

Any marine or aquatic animal or plant, living or not and processed or not, and any of their parts and includes any shell, coral, reptile, and marine mammal.

### **Fish infrastructure**

The building and facilities needed for effective storage, landing, transporting, and selling of fish.

### **Fish processing**

Any process that adds value to or preserves fish and includes the cutting up, dismembering, cleaning, sorting, icing, freezing, drying, chilling, salting, gutting, smoking, canning or any other action taken to alter the shape, appearance, or form of fish from that in which the fish is when first taken from its natural habitat.

### **Fish product**

Any product or part thereof (including oil) obtained by fish processing, and intended for use as human food, animal feed or raw material ingredient in the manufacture of other commodities of commercial or ornamental value.

---

## DEFINITION OF TERMS

### **Fishery**

a. One or more stocks of fish, or parts thereof existing in a delineated area, which can be treated as a unit for the purposes of conservation, development and management, taking into account geographical, scientific, technical, customary, recreational, economic and other relevant characteristics;

or

b. Any fishing for such stocks

### **Illegal, Unreported and Unregulated fishing**

Fishing which does not comply with national, regional, or global fisheries conservation and management obligations.

### **Landing Sites**

The place along the beach where boats land for purposes of disposing off their catch.

### **Market**

Individual/group of buyers; a place of purchase, a region or country being targeted with a product

### **Market development**

Expanding the market either by getting new buyers or identifying new uses for the current buyers to buy more.

### **Marketing**

It is about satisfying customer wants and needs and in the course of doing so facilitating the achievement of an organization's objectives.

## LIST OF FIGURES

**Figure 1** World capture fisheries and aquaculture production

**Figure 2** Fish Production in and supply in Kenya (Source: KeFS Annual Statistical Bulletin 2021)

**Figure 3** Aquaculture seafood is expected to overtake wild-catch seafood production by 2020

## LIST OF TABLES

**Table 1** Aquaculture production in Africa (Data Source: WAPI-AQPRN v.2018.)

**Table 1.0** Quantity (Metric Tonnes) of Fish Landed 2016-2020

**Table 2** Bar graph showing of fish landings 2016-2020

**Table 2.3.2** Total Import and Export Value in Kshs. ('000)

**Table 2.4.1** Quantities consumed globally and locally

**Table 2.10** PESTEL Analysis

**Table 2.11** SWOT Analysis

**Table 4.1** Partners and their Roles and Mandates

**Table 6.4** Risks and Mitigation Measures

1.0



# INTRODUCTION

## 1.1 Background Information

Fisheries is a key sector contributing greatly to Kenyan Economy and is critical in food and nutrition security, employment creations, source of raw materials for industries, income generation and cultural heritage.

In line with the Kenya Vision 2030, The Constitution, Kenya Vision 2030, Kenya kwanza plan, the bottom-up economic transformation agenda 2022-2027, Sustainable Development Goals (SDGs Target 14b and Target 2.3) and Africa Union Agenda 2063; the National Fish Marketing Strategy has identified key measures for inclusion of the low-income earners and industry players to drive economic transformation in the fisheries sub sector.

The key interventions to realize this will include; increase the productive capacities of fishers, development of market system and key infrastructures, financial inclusion, industrial transformation and operationalization of commercial entities to drive trade in fish and fish products. These proposed interventions will work towards realization of the government plan to create more employment to the youth, income generations, and provisions of food and nutrition security to the country and enhance international trade.

According to the National Export Development and Promotion Strategy 2018, the annual market size of fish and fish products in the countries that buy Kenyan fish is estimated at USD 71 billion. Despite the huge potential in the industry, there are notable challenges that have led to the decline in income from domestic and export trade.

In order to enhance fish marketing, the Kenya Vision 2030 Flagship Programmes and Project Progress Report (FY 2020/21) describes how the sector plays an important role both economic and social development through increasing the country's GDP from 0.5 percent in 2017 to 0.6 percent in 2021 thus supporting about 500,000 people directly and about 2 million indirectly.

The fisheries industry in Kenya contributes to the national socioeconomic development through; food and nutrition security, employment, income generation and trade development. It also provides raw materials for production of animal feeds as well as fish oil and bio-active molecules for the pharmaceutical industry. Further, the sub-sector supports auxiliary industries such as net making, packaging materials, boat building and repairs, hospitality, sports and recreation services.

The fish industry is a key contributor to Kenya's foreign exchange earnings as evidenced by the listing of fish and fish products among the top ten principal exports. Kenya aims to increase her market share for fish and fishery products at local, regional and international markets.

The sub-sector registered a slight improvement in performance in the year 2022 with the total value of fish landed increasing from Kshs 29.3 billion in 2019 to Kshs 31.1 billion in 2021, largely attributed to an increase of Kshs 1.1 billion in the value of freshwater fish landed. Total quantity of fish landed increased by 9.6

thousand metric tons from 164.0 thousand metric tons in 2021 to 173.6 thousand metric tons in 2022 partly owing to measures aimed at encouraging optimal exploitation of fishery products (Economic survey 2023).

The quantity of fish landed from freshwater and marine sources increased by 4.8 and 10.9 per cent in 2022 simultaneously. Fish output from Aquaculture increased by 5.6 per cent from 20.0 thousand tons in 2021 to 22.0 thousand tons in 2022. This accounted for 15.7 per cent of total fish production from fresh water sources and 12.8 percent of total fish landings in the country. (Economic survey 2023)

The Blue Economy blueprint suggests increasing production through support to artisanal fishermen by organizing Beach Management Units (BMUs) into viable commercial entities such as cooperatives, capacity building in business and technical areas and support for fishing fleet modernization. The blue economy blueprint also recommends enforcement of the law regulating the landings of fish from ships belonging to Distant Water Fishing Nations (DWFN) who are required to land 30% of their catch from Kenya's EEZ.

Kenya as a globally competitive and prosperous nation through development of modern fishing infrastructure aimed at enhancing the sector's efficiency. The Kenya's "Bottom-Up" agenda, which prioritizes empowering local communities and promoting grassroots economic development. The countries with abundant marine and inland resources that have supported the livelihoods of our fisheries communities for generations.

Fisheries play a significant role in the country's economy, food security, and livelihoods of coastal communities.

Kenya produces and supplies fish from 3 main sources:

**i. Inland capture fisheries resources:**

Kenya is endowed with several freshwater bodies, including lakes, rivers, dams, and wetlands. Lake Victoria, Lake Turkana, and Lake Naivasha are among the major water bodies supporting vibrant fisheries. Tilapia, Nile perch, catfish, and lungfish are some of the important fish species found in these inland waters. Inland fishing is conducted by both artisanal fishermen and commercial fish farms.

This contributed approximately 119,243 MT in the year 2022, which represents over 69% of total fish landed in Kenya (Economic survey 2023).

**ii. Marine fisheries resources:**

Kenya has a coastline stretching over 500 kilometers along the Indian Ocean, providing access to rich marine resources. The coastal region is home to various fish species, including tuna, snapper, grouper, sardines, and lobsters. Marine fishing is primarily carried out by artisanal fishermen who use traditional fishing methods such as handlines, gillnets, and traps.

Based on the Common Wealth Report, 2003; it was estimated that the Kenyan marine fisheries had potential of between 150,000 to 300,000 Metric tons.

### iii. Aquaculture resources:

Recognizing the potential of aquaculture, Kenya has been actively promoting fish farming as an alternative to wild capture fisheries. Tilapia, catfish, carp and trout are among the commonly farmed fish species. Aquaculture provides opportunities for economic growth, employment, and diversification of fish production.

This is divided into four main categories namely:

- a) **Mariculture** which is mainly carried out in coast and includes farming of seaweed, prawns, sea cucumbers, milk fish, sea bream, and mollusks, among others.
- b) **Land based Aquaculture:** The Kenyan fishery sector has great capacity for fish farming with over 1.14 million hectares potential available to enable production capacity of over 11 million tons per year (Nyandat and Owiti 2013) as cited by KIPRA, 2020.
- c) **Lake based Cage culture:** Kenya produces approximately 1,891 MT annually.
- d) **Ornamental fisheries:** The industry is still located within the rich tuna belt in the Southwest Indian Ocean.

### iv. Conservation Efforts

The Kenyan government, in collaboration with international organizations and stakeholders, has implemented various measures to promote sustainable fisheries. These include the establishment of marine protected areas; implementation of nature-based solutions to restore and expand critical habitats like mangroves, sea grass and coral reefs for climate mitigation and protection/restoration of fish breeding areas; the introduction of fishing regulations and the promotion of sustainable fishing practices.

Efforts are also underway to enhance surveillance and enforcement to combat illegal fishing activities within Kenya's exclusive economic zones and territorial waters.

Kenyan fish and fishery products are exported to the EU, Middle East, USA, Asian countries and regional markets. The fish and fish products exported mainly consist of fresh water fish filets, marine finfish, shellfish, smoked fish and dried fish.

Fish exports have been on a steady decline in the last 10 years with a high of 36,368 MT in 2006 with an estimated value of Kshs. 5 billion to a low of 8,387MT in 2020 valued at Kshs. 2.7 billion. Fish imports have been on a steady increase over the last 10 years. It has risen from 30MT in 2005, valued at Kshs. 20 million, to 5,853MT in 2014 valued at Kshs. 640 million.

It has continued to grow to 19,892 MT, valued over 2.5 billion in 2020. Exports of fish and fishery products were 8,372 MT worth Kshs. 2,735 billion in 2020 while importing 19,892MT of fish worth Kshs. 2.252 billion (Fisheries Statistical Bulletin, 2020)



## 1.2 Rationale for Fish Marketing Strategy development

The mandate of Kenya Fish Marketing Authority as provided for in the Fisheries Management Development Act, 2016 is to market fish and fisheries products from Kenya to enjoy premium market access through the following functions:

- a) Develop, implement and coordinate a national fish marketing strategy;
- b) Identify fish market needs and trends and advise fisheries stakeholders accordingly;
- c) Ensure that fish and fisheries products from Kenya enjoy market access at local, national, regional and international levels as premier products and, to this end, that the products and markets are developed and diversified;
- d) Organize stakeholders to ensure smooth marketing of fish and fishery products;
- e) Collaborate with national and international trade related bodies;
- f) Advise the cabinet secretary on issues related to national and international trade trends; and
- g) Perform any other functions that are ancillary to the object and purpose for which the fish marketing authority is established

To unlock the full potential of Kenya's fisheries, there's a crucial need to establish and put into action a comprehensive National Fish Marketing Strategy. This strategy is designed to overcome various obstacles that currently hinder the optimal performance of the market. Its primary focus lies in enhancing the competitiveness of Kenyan fish and fisheries products both locally and globally.

This strategic initiative targets key challenges such as the limited availability of fish and fisheries products, significant post-harvest losses, insufficient efforts in adding value to these products, low volumes of fish being traded within the country and abroad, as well as the comparatively low per capita fish consumption in Kenya.

Additionally, it addresses issues surrounding the lack of effective utilization of market information, inadequacies in technical and entrepreneurial skills, insufficient infrastructure for fish and its products, and the unequal distribution of profits along the fish value chain.

The success of this strategy rests upon the integration of fish value chain participants and businesses, expanding market reach, fostering innovation in product development, and diversifying strategies to penetrate and thrive in various markets. By addressing these challenges and fostering collaboration across the value chain, the aim is to drive sustainable growth in Kenya's Blue Economy.

### 1.3 The Process of Strategy Development

The office of the Principal Secretary initiated the process by constituting a committee of experts from; the State Department for the Blue Economy and Fisheries, Kenya Fish Marketing Authority, Kenya Fisheries Service, Kenya Fishing Industries Corporation, Kenya Marine and Fisheries Research Institute with the option of co-opting other relevant stakeholders.

- 1) The team held a consultative meeting to develop a work plan to guide the task execution.
- 2) The team of experts developed the draft strategy.
- 3) The Strategy was later subjected to the Sector Working (Agriculture) Group on Policy, Legislation and Standards;
- 4) County stakeholders' consultations were held at regional levels;
- 5) The strategy was presented to National stakeholders for validation at KALRO Naivasha
- 6) The recommendation from the National stakeholders were incorporated into the strategy
- 7) The strategy was then presented to Board of Management of Kenya Fish Marketing Authority for inputs and approval
- 8) The inputs of the Board of Management of Kenya Fish Marketing Authority were incorporated into the strategy.
- 9) The strategy was presented to the Principal Secretary of the State Department for the Blue Economy and Fisheries for endorsement.
- 10) Publishing, launching and distribution of the strategy

### 1.4 Scope of the Strategy

The comprehensive National Fish Marketing Strategy aims to holistically develop the market for fish and fisheries products, targeting enhanced competitiveness in both local and global markets.

The strategic objectives encompass:

- 1) Increasing supply of fish and fisheries products from 149, 722 Metric Tons to 450,000 MT by promoting responsible conservation, production and harvesting of fisheries resources in lakes, rivers, dams and the ocean to increase supply of fish
- 2) Reducing post-harvest losses on fish and fisheries products from 30% to 10%.
- 3) Increasing the quantities of fish traded in the domestic, regional and international markets from 8,372 MT in 2020 to 16,000 MT in 2029
- 4) Elevating the value of fish and fisheries products to expand market Access
- 5) Promoting the digitization of the fish marketing environment to optimize efficiency and effectiveness

- 6) Promoting sustainable consumption of fish and fisheries products for a healthy and nutritious diet for all. The target is to raise the National Per Capita Consumption from the current 3.6 kg to 8 kg by 2029.
- 7) Enhancing technical capacity and entrepreneurial skills among staff and value chain actors on markets and marketing
- 8) Improving access to relevant fisheries handling and marketing infrastructure at strategic points
- 9) Enhancing access to financial services and insurance products for fish marketing
- 10) Supporting compliance with safety and other international requirements on fish safety and quality assurance.

## **1.5 Guiding Values and Principles**

The guiding principles in this strategy include

- i. Competitiveness
- ii. Transformation
- iii. Inclusiveness
- iv. Performance
- v. Efficiency
- vi. Resilience and Sustainability

2.0



SITUATION  
ANALYSIS

## 2.1 Introduction

The Blue Economy and fisheries sector continues to be a fundamental pillar for sustainable economic development in Kenya and has contributed immensely in food and nutritional security, income generation, employment creation and livelihood improvement. However, the sector continues to experience a number of challenges that hindered its contribution to the GDP growth.

With the emergence of the Blue Economy as the new economic frontier, there are hopes that fisheries contributions will increase in the national, regional and global economies.

## 2.2 Fish Production and Supply to the Market

### 2.2.1. Global Fish Supply to the market

Over the past sixty years, the global fish supply has shown a significant upward trend, climbing from 19 million metric tons (MT) in 1950 to a substantial 171 million MT in 2016. This surge in supply is derived from two primary sources:

Firstly, capture fisheries reached a peak production of around 96 million MT in 1996.

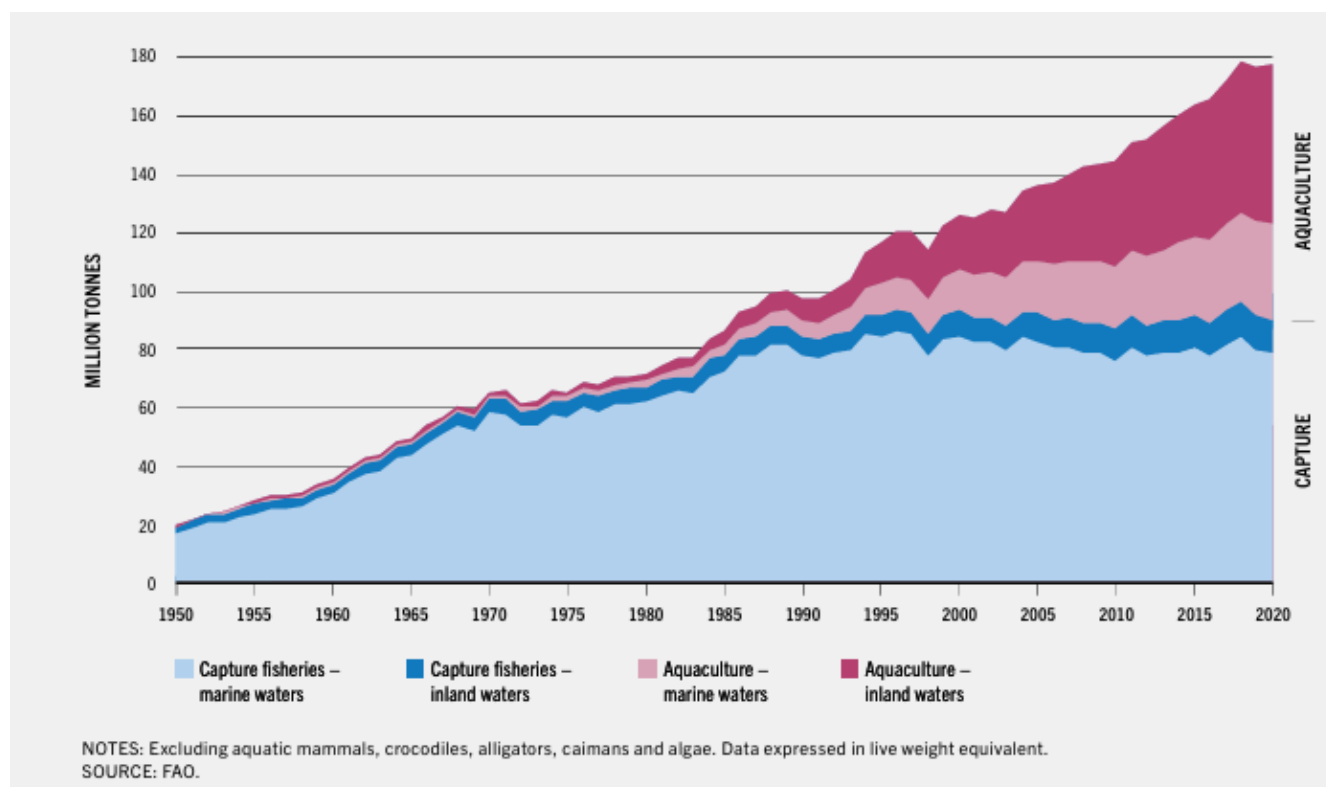
Secondly, aquaculture has exhibited remarkable growth, doubling its production every decade for the past 50 years. In 2016, it yielded 80 million MT of food fish, 30.1 million MT of aquatic plants, and 38,000 MT of non-food products.

The Food and Agriculture Organization (FAO) estimates the annual global value of fish production at 401 billion (at cost), with a significant portion—250 billion—attributed to aquaculture. Projections from the OECD-FAO Agriculture Outlook suggest a consistent increase in global fish production by more than 1% annually, reaching 195 MT by 2027.

This growth is primarily driven by the expansion of aquaculture. Forecasts indicate a remarkable 30.1% surge in aquaculture production, equating to an additional 24 MT between 2018 and 2027. This trajectory positions aquaculture to surpass capture fisheries production by 2020, indicating a significant shift in the dynamics of global fish production.

The sector has faced rising costs of production as a result of high cost of crude oil, feeds, fingerlings, machinery and equipment, fish health and other production inputs. High cost of fuel has a strong bearing on the cost of raw material for manufacture of feeds and a factor in international freighting and distribution.

## World Fisheries and Aquaculture Production



### 2.2.2 Fish Production and Supply in Africa

The New Partnership for Africa's Development (NEPAD) estimates that total fishery production in the Africa stands at 10.4 million tons comprising of approximately; Marine capture fisheries, 6.0 million tons, Inland water fisheries 2.8 million tons and Aquaculture 1.6 million tons (Obiero et al. 2019)

Kenya is the fourth largest producer of farmed fish in Africa, having experienced a significant growth from 4,452 tons in 2008 to a peak at 24,096 tons in 2014, spurred by a large-scale aquaculture subsidy Programme under the Economic Stimulus Programme (ESP) from 2009–2013. In Burundi, Ethiopia and Tanzania, aquaculture contributes less than 10% of the fisheries production.

### 2.2.3. East Africa Fish Production and Supply

In the Eastern Africa region encompassing countries such as Burundi, Ethiopia, Kenya, Rwanda, Uganda, and Tanzania, fish production derives from both freshwater inland and marine capture fisheries alongside aquaculture. Notably, the inland capture fishery sectors contribute significantly to the overall fishery production in this sub-region. (Obiero et al. 2019)

However, aquaculture production within the Eastern Africa sub-region remains comparatively smaller in scale when compared with leading African producers like Egypt (1.37 million tons) and Nigeria (306,727 tons).

The primary focus of aquaculture production revolves around tilapia farming, which also happens to be the most favored fish among consumers. Uganda stands out with the highest aquaculture production, reaching 118,000 tons harvested from 25,000 ponds spanning across 10,000 hectares in 2016. (Obiero et al. 2019)

<b>COUNTRY</b>	<b>CAPTURE FISHERIES PRODUCTION (TONES)</b>	<b>AQUACULTURE PRODUCTION (TONES)</b>	<b>TOTAL DOMESTIC FISHSUPPLY (TONES)</b>	<b>AQUACULTURE AS A SHARE OF FISH PRODUCTION (%)</b>
<b>Sub-Saharan Africa</b>	7,254,848	592,540	7,847,388	7.8
<b>Egypt</b>	335,613	1,370,660	1,706,273	81.73
<b>Nigeria</b>	734,731	306,727	1,041,458	30.62
<b>Burundi</b>	20,120	1,326	21,446	6.2
<b>Ethiopia</b>	45,519	91	45,610	0.2
<b>Kenya</b>	165,135	18,658	183,793	11.3
<b>Rwanda</b>	29,334	4,847	34,181	14.2
<b>Tanzania</b>	371,228	10,742	381,970	2.8
<b>Uganda</b>	396,205	117,590	513,795	22.9

Table 1: Aquaculture production in Africa (Data Source: WAPI-AQPRN v.2018.)

## Challenges in Fishery Sector in East Africa

Although great work has been done in improving supply of fish in Kenya and East Africa as a whole, fish catches from wild sources have been declining due to multiple anthropogenic pressures including;

- 1) Climate change,
- 2) Overfishing, Habitat destruction, Invasion of non-native species,
- 3) Illegal, unreported, and unregulated fishing (IUU), and
- 4) Poor governance

This strategy plans to promote responsible; conservation, production and harvesting of fisheries resources in; lakes, rivers, dams and the ocean to increase supply of fish.

## Fish Production and Supply in Kenya

Annual fish production in Kenya has been on the increased as follows;

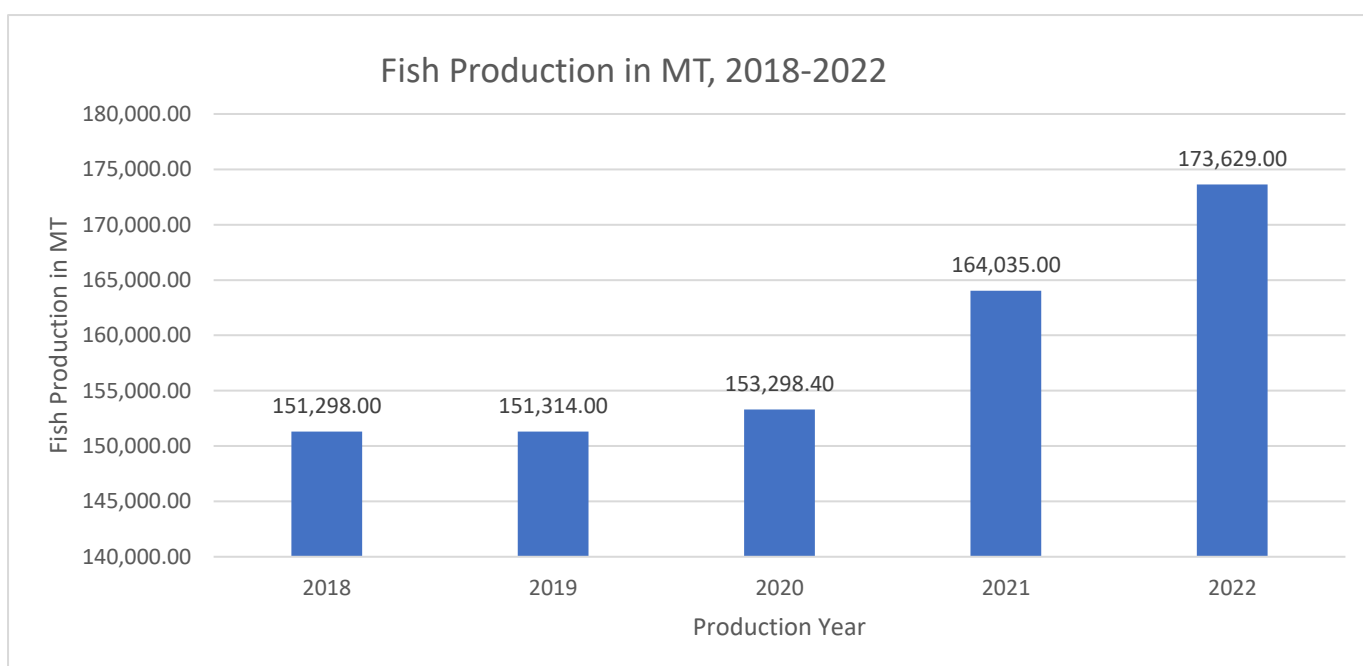


Figure 2: Fish Production in and supply in Kenya (Source: Economic Survey,2023)

## Marine and Freshwater Sources

The quantity of freshwater fisheries and marine fishery production in Kenya has been going down as indicated in the table below;



**Table 1.0 Quantity (Metric Tonnes) of Fish Landed 2018-2022**

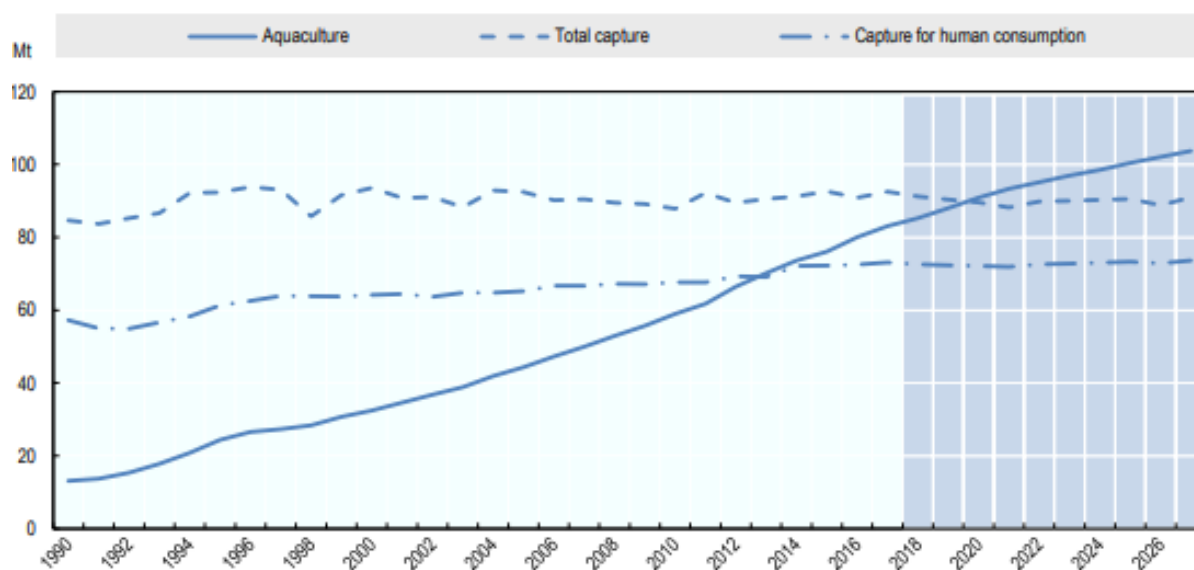
FISH	2018		2019		2020		2021		2022	
	MT	KS H Million	MT	KSH Million	MT	KS H Million	MT	KS H Million	MT	KS H Million
	<b>Fresh Water</b>	124,673	20,113.70	121,565	18,721.40	124,019	20,585.10	136,326.00	23,322.90	141,383.00
<b>Marine</b>	25,455	4,754.70	27,740	4,923.80	25,703	5,666.30	27,279	7,060.80	32,246.00	6,967.60
<b>TOTAL</b>	<b>150,128</b>	<b>24,868.40</b>	<b>149,305</b>	<b>23,645.30</b>	<b>149,722</b>	<b>26,251.30</b>	<b>163,605.00</b>	<b>30,383.70</b>	<b>173,629</b>	<b>31,062.00</b>

Table showing fish landings by Weight and Value from Aquaculture, Mariculture and cage culture 2016-2020 is given below

YEA R	AQUACULTURE		MARICULTURE		CAGE CULTURE	
	Weight inMT	Value in '000 Kshs	Weight in MT	Value in '000Ks h	Weight in MT	Value in '000 Kshs
<b>2016</b>	14,952	4,253,844	35	1,050	-	-
<b>2017</b>	12,356	3,691,046	51	1,530	228	79,656
<b>2018</b>	15,320	4,480,875	64	1,920	963	279,838
<b>2019</b>	18,542	5,581,142	76	1,895	-	-
<b>2020</b>	19,945	6,303,617	85	2,119	-	-

Table 2: Fish landings 2016-2020

It was projected earlier that aquaculture fish production will overtake wild production as indicated in the following table;



Source: OECD/FAO (2018), "OECD-FAO Agricultural Outlook", OECD Agriculture statistics (database),

## Past Government Interventions to Increase Fish Production

### Aquaculture Sub Sector

To enhance aquaculture output, the Ministry of Fisheries Development initiated a fish farming promotion within the Economic Stimulus program. The primary goals were to stimulate income, boost employment, improve community nutrition, and drive rural development. Starting in July 2009, this initiative expanded into the three-year Fish Farming Enterprise and Productivity Programme (FFEPP).

The initial phase received an allocation of Kshs. 1.12 Billion, facilitating the creation of 28,000 ponds across 140 constituencies, each equipped with 15 kilograms of fertilizer and 1,000 fingerlings (Mwamuye et al., 2012). Further, an additional Kshs 2.866 billion in 2010/2011 supported the establishment of 6,000 fish ponds in 20 new constituencies and an extra 14,000 ponds in the original 140 constituencies from Phase I.

This marked a significant achievement in national fish farming production. Between 2010 and 2014, there was consistent yearly growth, with quantities reaching 7,258 tons, 7,112 tons, 2,222 tons, 2,014 tons, and 595 tons, respectively. However, after reaching its peak at 24,096 MT in 2014, Kenya's aquaculture production declined to 12,356 MT in 2017.

Multiple factors contributed to this decline, including limited water retention capacity in ponds, particularly in regions like the Eastern and Coastal areas, insufficient extension services, inadequate management practices, shortages of inputs for fish farming, weak marketing structures, heavy reliance on government and

donor support, and a lack of value addition (Munguti et al., 2017; Obwanga and Lewo, 2017; Opiyo et al., 2018).

However, since 2018, there has been a gradual resurgence in aquaculture production. Additionally, the State Department of Fisheries has implemented various strategies, such as restocking rivers and dams, establishing demonstration infrastructure for intensive recirculation Aquaculture Systems (RAS) in Sagana, launching the Aquaculture Business Development Project (ABDP), and introducing aquaponics in numerous schools. These initiatives are aimed at rejuvenating and sustaining the growth of the aquaculture sector

### **Marine and Inland Fisheries Sub sector**

A number of proposed interventions have been identified country wide to boost fish production both inland and capture fisheries with the government determined to develop and upscale several landing sites. Some are renovations and several are identified constructions targeting areas of landing for quality assurance and value additions as stipulated below;

#### **Enhancing fishing infrastructure**

The commitment to enhance fishing infrastructure will translate to improvement in Economic Development:

The fisheries sector contributes significantly to the nation's economy. By investing in modern fishing infrastructure, we aim to create an enabling environment for fishermen, fish processors, traders, and other stakeholders to thrive. The Kenyan government is currently upgrading fishing port infrastructure at Liwatoni, Mombasa County and developing Shimoni fish port in Kwale County. These will encourage docking of fishing vessels to land fish for value addition and marketing.

To date several fish landing site infrastructure have been developed in Sori in Migori County, Luanda K'Otieno in Siaya County, Mulukhoba in Busia County, in western region. While coast region developments includes at Kichwa cha Kati in Kilifi County and Ngomeni fish Landing site in Kilifi County, Liwatoni in Mombasa County, Kibuyuni, Gazi fish Landing sites and National Mari-Culture Resource Centre at Shimoni in Kwale county. Plans are underway to developed additional facilities in other water bodies in the country for the benefit of our fishers.

Upgraded fish ports, fish landing sites infrastructure, storage facilities, and processing plants will attract more investment, facilitate trade, and stimulate economic growth along the entire fisheries value chain.

#### **Employment Opportunities:**

Fishing infrastructure improvements will generate employment opportunities for citizens, particularly those residing in coastal and fishing communities. Upgrading and expanding fishing ports, constructing new

landing sites, and establishing processing facilities will advance decent fisheries by creating direct and indirect jobs, empowering individuals and families with sustainable livelihoods. This will contribute to poverty alleviation and socio-economic development in these regions.

### **Value Addition and Market Access:**

Modern fishing infrastructure will enhance value addition and ensure that fish products meet international quality standards. By investing in cold storage, ice plants, refrigeration units, and processing facilities, the shelf life and quality of fish products is enhanced. This, in turn, will open doors to regional and international markets, enabling fishermen to fetch higher prices and increase their income.

### **Sustainable Fisheries Management:**

Upgraded fishing infrastructure plays a crucial role in supporting sustainable fisheries management practices. By providing adequate facilities for fish handling, storage, and processing, post-harvest losses and wastage is minimized. Furthermore, improved infrastructure will allow for better monitoring, enforcement, and implementation of fisheries regulations, ensuring the conservation of fish stocks, protecting marine ecosystems, and promoting responsible fishing practices.

## **2.3 Marketing of Fish and Fishery Products**

### **2.3.1. Global and Regional Marketing Situation**

In recent decades, the trade of fish and fish products has expanded significantly, driven by increased fishery production and soaring demand in an ever more globalized industry. By 2014, developing countries contributed 54 percent, amounting to US\$80 billion, of the total fish and fish products exports.

The FAO's 2020 report revealed that in 2018, the international trade of fish reached 67 million tons (live weight equivalent), valued at USD 164 billion, representing nearly 38 percent of the global fish catch or production. This trend of escalating trade volumes continued positively until 2019. However, in 2020, the trade encountered a decline due to a series of challenges that emerged.

### **Global Market challenges**

#### **i. Market Challenges:**

The requirements at regional and international markets such as by World Trade Organization (WTO); Sanitary and Phytosanitary Measures (SPS); Technical Barriers to Trade (TBT); Rules of Origin; Codex; EU requirements and World Animal Health Organization (OIE) may affect market access for fish and fish products.

ii. **Unfavorable International Terms of Marketing Terms:**

Developed countries in particular, continue to impose prohibitive tariff and non-tariff barriers. These include; use of agricultural subsidies in support of farmers in developed economies and protectionist policies, which result in unfavorable market access and declining commodity prices. International trade negotiations such as those under the World Trade Organization and the Economic Partnership Agreements (EPAs) have been slow and have achieved little progress in the last decade.

iii. **Global Economic Slowdown: The Recession;**

In the recent past, the world economy has been faced with an economic slow-down with signs of possible recession as a result of COVID19. Many countries have registered an economic downturn characterized by high inflation and unemployment.

The recent melt down in banking and the flow of money in the United State of America (USA), Europe and Asia have also presented new and worrying dimensions to global finance. The slow-down is likely to reduce the demand for agricultural commodities and reduce flow of capital into the developing countries.

iv. **Regional Market Dynamics:**

Some countries within the region belong to various economic blocks which gives them economic competitive advantage. However, the recent establishment of the African Union's Continental Free Trade Area (AfCFTA) provides opportunities for expanded intra-African trade and commerce for fish and fishery products.

### 2.3.2. Kenyan Fish and Fisheries' Products Domestic Market Situation

Lake Victoria serves as Kenya's primary source for fish, contributing over 90% of the country's fish supply, utilized both locally and for export. Within this vast aquatic resource, three primary fish species hold substantial economic importance: *Lates niloticus*, *Rastrineobola argentea*, and *Oreochromis species*. These species collectively constitute 50%, 37%, and 6% of the lake's total harvested tonnage.

In-depth market studies conducted a. cross major fish markets in Kenya showcase a rich variety of traded fish types, including Nile perch, tilapia, catfish, omena/sardines, and various marine species. Among these, tilapia stands out as the most sought-after fish in terms of value, holding considerable appeal among consumers. This adaptable fish is available in multiple forms—whole, filleted, smoked, sun-dried, or fried—offering consumers a wide range of choices.

Each species exhibits distinct marketing dynamics influenced by specific market characteristics. The historical evolution and infrastructure of fish landing beaches, the nature of processed products, the involvement and organization of intermediaries, the scale and location of consumer markets, as well as the

interplay between supply and demand, all contribute significantly to shaping the structure and effectiveness of their respective marketing systems. (Richard Abila)

## Kenyan Fish Exports and Imports

Despite Kenya's participation in the global fish trade, its market potential is hindered by limited product diversity, inadequate differentiation, insufficient technological investment, and a lack of thorough comprehension regarding consumer preferences and trends. These factors collectively impede the country's ability to fortify its presence and competitiveness in the international fish market.

Kenya exports a range of fish and fishery products to various markets, including the EU, Middle East, USA, Asian countries, and neighboring regional markets. These products encompass freshwater fish fillets, marine finfish, shellfish, smoked fish, and dried fish. However, over the last decade, there has been a consistent decline in fish exports, starting from a peak of 36,368.

In contrast, fish imports have shown a steady increase during the same period, commencing at 30MT in 2005 valued at approximately Kshs. 20 million, surging to 5,853MT in 2014 valued at around Kshs. 640 million, and climbing to 19,892MT valued at over 2.5 billion in 2020.

**Table 2.3.2: Total Import and Export Value in Kshs. ('000)**

	2017	2018	2019	2020
EXPORTS	2,882	3,017	3,446	2,775
IMPORTS	1,568	2,975	2,799	2,252

## 2.4. Consumption of Fish and Fishery Products

### 2.4.1. Quantities Consumed Globally and Locally

Currently, more than 30% of the continent's population, or roughly 200 million people, consume fish as the main animal protein source and micro nutrients. By 2013, per capita consumption was about 20kg per person per year, while in Africa it was approximately 10kg.

Kenya consumption per year per person is still low at 3.6kg per capita. (ABDP,2021). The fish, animal and total protein intake across Eastern African countries in 2013, compared to Africa and the global status.

Region/Countries	Population (Thousands)	Total Food/Fish Supply	Fish Consumption (kg/Person / Year)	Fish Protein (g/Person /Day)	Animal Protein (g/Person /Day)	Fish/Animal Protein (%)	Fish/Total Protein (%)
WORLD	7,162,118	142,126,714	19.8	5.4	32.1	16.9	6.7
AFRICA	1,110,636	11,225,497	10.1	2.9	16.0	18.4	4.4
BURUNDI	10,163	20,145	2.0	0.6	2.2	28.1	1.7
ETHIOPIA	94,101	39,347	0.4	0.1	7.7	1.6	0.2
KENYA	44,354	181,227	4.1	1.2	15.8	7.3	1.9
RWANDA	11,777	52,910	4.5	1.5	5.8	25.1	2.5
TANZANIA	49,253	352,304	7.2	2.3	10.4	22.5	4.0

Data Source: UN-DESA and WAPI- FISHCSP v.2018

In Africa, there remains a shortfall in fish supply, resulting in low per-capita consumption. However, the rise in fish imports and the expansion of aquaculture are expected to bolster individual fish intake.

Fish trade across the continent typically moves in both directions, with exports surpassing imports in terms of value. Despite this, considerable obstacles persist, impeding both domestic trade and trade within the region (Obiero et al. 2019)

#### 2.4.2. Consumption Trends Behaviors and Attitude in Kenya

Despite the wealth of evidence showcasing the health advantages tied to fish consumption and their potential to combat nutritional deficiencies and food insecurity, Kenya grapples with a challenge: low fish consumption, currently standing at 3.6%. This figure notably falls well below both the African and global averages for per capita consumption rates.

Tilapia, Nile perch, and African Catfish emerge as the top choices among consumers in Kenya, as highlighted by Ngwili et al. (2015). Among these, Tilapia dominates the market supply, constituting 70%, while the African catfish follows at 21% (Kyule et al. 2016).

This situation stems from multiple factors, including heightened fish prices, limited expertise in preparing fish, sensory preferences impacting taste and aroma, and prevailing consumer attitudes. Additionally, consumers' purchasing patterns are notably affected by limited disposable income, rendering fish products relatively expensive compared to alternative food options.

It's crucial to recognize that fish and fisheries products are invaluable sources of protein and essential minerals, crucial for a well-rounded human diet.

### **Mean Prices/Kilogram for Different Fish Species**

<b>Fish species</b>	<b>Mean Price/ kg</b>
Nile Tilapia	374
African Cat fish	308
Lake Victoria Sardine	157
Common Carp	274
Nile Perch	339
Other Fish	249

## **2.5. Value Addition and Processing of Fish and Fisheries Products**

The industry currently lacks substantial investments in producing value-added fish and fisheries products for national and global markets. A significant portion of fish and related items are sold in their raw state locally, lacking additional processing or value-adding measures such as packaging. This missed opportunity denies the industry the chance to create more jobs and generate additional revenue from further processing. By encouraging value addition throughout the supply chain and implementing measures to reduce post-harvest losses, the fisheries sector could significantly amplify its contribution to the GDP.

### **2.5.1. Processing and Value Addition Challenges in Kenya**

**1. Low investment in value addition and marketing;** the sector has limited investments in production of value-added products for both national, regional and international markets. Most fish and fish products are sold in raw form in the local markets without further processing and or without any form of value



addition like packaging. Lack of incentives and investments, inadequate quality assurance infrastructure has hampered utilization and trade in fish and fishery products. These are necessary for product development, value addition and marketing.

**2. Inadequate infrastructure to support fish processing;** for instance, poor roads to fish landing beaches, insufficient ice to preserve fish and fish transport boats; and inadequate certified food safety laboratories/facilities to support fish processing for the export market.

**3. Weak quality assurance systems;** Fishery products possess a limited shelf life and quickly depreciate in quality and economic worth without proper handling. Minimizing post-harvest losses, ensuring the quality and safety of fish for human consumption, and adhering to sanitary and Phytosanitary (SPS) measures are essential tasks in this regard.

## 2.6 Fishing Infrastructure in Kenya

The Kenyan fishing industry is predominantly artisanal, with a limited number of commercial and industrial vessels primarily focused on shrimping. Additionally, there are purse seiners and long liners operated by Distant Water Fishing Nations (DWFN) holding licenses to fish for tuna and similar species within Kenya's Exclusive Economic Zone (EEZ).

In an effort to tap into the lucrative tuna market, Kenya has recently introduced deep-sea fishing vessels flying the Kenyan flag, thereby granting the fish caught the status of being of Kenyan origin. Approval was granted by the Indian Ocean Tuna Commission (IOTC) to introduce up to 70 deep-sea fishing vessels into Kenyan EEZs, paving the way for Kenyan vessels to engage in deep-sea fishing activities.

To support this expansion, several fish port facilities and cold chains have been constructed in strategic locations such as Mombasa, Lamu, and Liwatoni. These facilities enable fishing vessels to dock, unload their catch, and refuel.

Furthermore, three fishing boats have been procured and allocated to Kwale, Kilifi, and Lamu Counties respectively, aimed at providing support to fishers and Beach Management Units (BMUs) in these regions. Landing sites have also been constructed in Lake Victoria and at the coast these ensure that fish that is landed is safe and of good quality.

Kisumu, Nairobi, and Mombasa have seen the establishment of quality control laboratories. The Aquaculture Business Development Programme (ABDP) is focused on enhancing the inland fish marketing infrastructure, overseen by local authorities. Its objectives include refurbishing physical facilities like markets and cold storage units in crucial marketing areas for perishable fish products. Additionally, the ABDP aims to bolster value-adding services such as internal distribution of produce, post-harvest handling, processing, and branding within these regions.

## 2.7. Institutional, Policy and Legal Framework Analysis

Kenya's fisheries sector operates within a robust institutional and policy framework laid out by the Fisheries Management and Development Act No. 35 of 2016. This legislation strategically tackles legal and regulatory barriers that previously impeded the sector's growth. Emphasizing developmental management, sustainable resource utilization, conservation, and enforcement, the Act established the Kenya Fish Marketing Authority (KFMA) to oversee fish and fishery product marketing.

Under the guidance of this Act, the National Fish Marketing Strategy is formulated, with the KFMA taking a lead role in developing and implementing competitive marketing systems. Collaborating with institutions like state department of the blue economy and fisheries, Kenya Fisheries Services, Kenya Fishing Industries Corporation, Kenya Marine and Fisheries Research Institute, Fish Levy Trust Fund, County Governments, and the private sector, these efforts aim to enhance effective fish marketing in Kenya.

The national policy landscape, including the Constitution of Kenya 2010, the National Oceans and Fisheries Policy 2008, and subsequent regulations and guidelines, is interwoven with the Fisheries Management and Development Act 2016. The alignment with policies addressing climate change, aquaculture, and county-specific finance acts further bolsters the comprehensive approach to fisheries management.

This strategic direction is deeply intertwined with global sustainability goals, specifically SDG 14 (conserving life under water) and SDG 2 (ending hunger and improving nutrition). The strategy takes a proactive stance against overfishing, pollution, and habitat encroachment, ensuring these concerns are central in all planned interventions.

Despite a reported negative growth trend in the past, the Agricultural Sector Transformation and Growth Strategy aims to reverse this trend by targeting positive growth in the Blue Economy. mitigating international market challenges, such as product rejection, the strategy emphasizes sustainable trading practices, focusing on providing high-quality products meeting both local and international market demands while fostering information sharing among fish value chain players.

Kenya's participation in regional treaties, protocols, and agreements (e.g., FAO Blue Growth Initiative, CAADP, IGAD, COMESA, EAC) further amplifies its commitment to regional collaboration and adherence to shared objectives in fisheries and aquaculture development. Simultaneously, its engagement in global initiatives (e.g., UN Sustainable Development Goals, CITES, CBD, Sustainable Blue Economy Conference 2018, UN Decade of Ocean Science) underscores its dedication to aligning with international sustainability agendas and ensuring responsible fisheries management practices on a global scale.

### 2.7.1. Global, Regional and Domestic Legal and Institutional Challenges

The marketing of fish and fisheries products faces several policy challenges that hinder their effective distribution and trade both locally and internationally:

1. **Diverse Tax Regimes:** Varying tax regimes across different Regional Economic Blocks, where AU member states operate, create obstacles to smooth trade operations within the region, affecting the flow of fish and fishery products.
2. **Non-Tariff Barriers:** Some countries impose non-tariff barriers, exacerbating trade challenges by introducing additional barriers beyond tariffs.
3. **Political and Security Concerns:** Instances of political instability and regional insecurity create uncertainties, impacting the facilitation of free trade and causing disruptions in the fish trade ecosystem.

In Kenya specifically, despite the presence of operational institutions supporting fish marketing, several challenges hinder their effective utilization of local and international market opportunities:

1. **Policy Alignment Issues:** Weaknesses in policies arise due to the lack of alignment between the National Oceans and Fisheries Policy and the Fisheries Management and Development Act No. 35 of 2016. This disconnect affects the cohesive implementation of effective strategies within the fisheries sector.
2. **Coordination Gaps:** Inadequate coordination between the National and County Governments regarding fish production and export promotion further hampers the efficient exploitation of market opportunities, leading to suboptimal utilization of available resources for fish marketing.

### Capacity of Fish Value Chain Players

In Kenya's fish marketing landscape, several pivotal actors participate: producers, auctioneers facilitating fish sales, fishermen cooperatives, wholesalers handling bulk purchases and smaller-scale sales, retailers serving consumers, and vendors, often women, directly engaging with buyers. There are notable gaps in entrepreneurship, hindering the enhancement of value, synergy in production, facilitation of import-export activities, and efficient distribution across diverse market channels impacting on productivity and profitability

A number of factors hamper enterprise productivity;

1. Insufficient technical, organizational, and entrepreneurial skills across women, men, and youth involved in agribusiness.

2. Limited understanding of value chain development and the role of related platforms.
3. Low uptake of technology, especially climate-smart and gender/youth-friendly innovations.
4. Fear of failure, risk aversion, and challenges related to employees.
5. Most value chain systems prioritize meeting basic and social needs, leading to a skewed focus.
6. Many enterprises were initiated out of necessity rather than seizing opportunities, resulting in businesses primarily addressing social needs with limited potential for commercial growth (ASDSP Baseline report 2017)

However, there's room for improvement in these actors' abilities to merge technical skills with strategic business approaches. Creating a robust fish marketing ecosystem network involves collaboration with wholesalers, retailers, consumers, and processing industries

Access to affordable credit and insurance holds immense significance in expanding the marketing of fish and related products locally, nationally, and internationally. However, the formal banking sector often considers fisheries ventures as high-risk, leading to limited access to affordable credit. Microfinance institutions, though in operation, tend to increase credit costs and cater to only a small fraction of small-scale fish farmers, offering primarily short-term credit solutions.

## 2.8. CROSS CUTTING ISSUES AFFECTING SUPPLY AND MARKETING OF FISH AND FISH PRODUCTS

### 2.8.1. Gender Inequality

#### Gender issues include;

- a. Recognition of women participation and significant role in downstream activities like post-harvest handling, selling fresh fish, processing, storage, packaging, and marketing yet not commensurately rewarded
- b. Health concerns among women who process fish using traditional ovens. They often suffer from health issues due to smoke and heat exposure, impacting their respiratory system, skin, and even fingerprints, which can complicate obtaining identification or official papers.
- c. The use of this fish processing method can lead to diverse social consequences, straining household relationships due to the heavy workload.
- d. Women engaged in agriculture, fisheries, and aquaculture bear a triple work burden, juggling unpaid household responsibilities, community-level work, and productive tasks, limiting their ability to enjoy their human rights and fulfill their potential. Promoting aquaculture presents an opportunity to empower women by involving them in decision-making regarding nutritious fish food for their families.
- e. People living with disabilities encounter challenges in market participation due to mobility issues, hindering their involvement in the fish trade.

### 2.8.2. Incidence of HIV and AIDS and COVID 19

The occurrence of diseases, including the COVID-19 pandemic, among fisher folk has led to reduced production and productivity due to labor losses. The substantial expenses associated with treatment can further impact profits and overall business viability.

### 2.8.3. Climate change

One of the primary drivers shaping the bottom-up approach transformation agenda for 2022-2027 is centered around addressing environmental concerns and climate change impacts to mitigate, adapt, and foster resilience for sustainable development, aligning with the Kenya Fish Marketing Strategy. The adverse effects of climate change significantly impact fish production and marketing, leading to decreased supply due to rising water temperatures.

Additionally, escalating refrigeration costs contribute to higher production expenses. These combined effects directly affect livelihoods, potentially resulting in profound consequences for the environment, society, and the broader economy.

#### 2.8.4. Environmental concerns

Environmental factors influencing fish marketing encompass issues like waste and plastic pollution. Depending on the fish species being processed, solid wastes can constitute a substantial portion, ranging from 30% to 40% of the total production.

Effectively managing this waste poses a significant challenge for municipal authorities, as noted by UN-Habitat in 2007. Compounding this issue are hurdles faced by local authorities in waste collection and transportation to disposal centers, inadequate facilities in markets for fish handling, and a lack of awareness regarding proper disposal or recycling of fish wastes into beneficial by-products.

Although options exist for utilizing fish waste, such as incorporating it into fertilizers or animal feeds, these approaches are seldom pursued in Kenya. Meanwhile, the global problem of plastic pollution persists. Widespread use and careless disposal of plastics contribute to their enduring presence in the environment, capable of persisting for decades or even centuries.

#### 2.8.5. Cross border conflicts.

The trade of fishery products across Kenya's borders with neighboring countries has been hindered by cross-border conflicts. Presently, the cross-border fish trade is primarily reliant on traditional methods and, in numerous instances, operates outside legal frameworks. Various conflicts have surfaced between Kenya and Uganda, particularly concerning fisheries in Lake Victoria and Lake Turkana.

A recommended approach involves devising integrated regional programs aimed at enhancing both the production and marketing of fish and fish products across Kenyan borders. Implementing such initiatives is crucial for resolving the existing conflicts and fostering improved trade relations.

## 2.9. PESTEL Analysis

The Strategy takes cognizance of the Political, Economic, Social, Technological, Environmental and Legal issues that are critical to the development and advancement of the fish and fisheries products marketing. These will in the long run guide the sector in focusing on interventions aimed at growing fish and fish products markets. The key PESTEL issues and their strategic implications are highlighted in the table below.

NO	CATEGORY	ISSUE	STRATEGIC IMPLICATIONS
1	Political	Political Good Will	With the foreseen good will from the parent Ministry and the Executive, the budget allocation for implementation of this strategy will increase
		Fight Against Corruption	This is likely to improve ease of doing business and also lower cost of services needed by fish value chain players. This can lead to lower prices and improved trade and consumption
		Changes in Global Political	Political policies such as BREXIT, are likely to improve
		Policies	market access or reduce due to size of market after exit. War against Russia has led to a great economic downturn lowering purchasing power. This can affect consumption or investment in fish value chain
		Changes in the Local Political Regime	After the general elections, new leaders coming to power may prioritize fish marketing or remove it from the agenda.
2	Economic	Kenya's Economic Development Policies - The Kenya Vision 2030, Big 4 agenda	The Agency's mandate is vividly captured in the Kenya Vision 2030. The Vision's MTPs gives the sector direction on how to promote Kenya's fish and fish products regionally and internationally.
		Agenda and the Trade	The manufacturing pillar of the Big Four Agenda prioritizes the increase in the manufacturing share of GDP from 9.2 per cent to 15 per cent and agro-processing to at

			least 50 per cent of total agricultural output, this will lead to increase of processed fish and fish products exports.
		Regional and Global	Regional and global integration like AfCFTA, TFTA and AGOA increase competition or improve access to market and inputs. There is a need to guard against any negative regional impacts.
		Economic Cooperation	
		Globalization	This can enhance market knowledge of competitor products and benefits of products in conducting business activities making fish business more efficient.
		Inflation	This leads to increased prices of inputs like feeds impact on the price of fish lowering quantity demanded
		Youth and Women Unemployment	This can affect purchasing power or involving of this vulnerable groups impeding success of the strategy
3	Social	Sustainable Development Goals (SGD's)	These goals call for action to end poverty, protect the planet and ensure that all people enjoy peace and prosperity by 2030. Since strategy is guided by these goals, many development partners implementing the goals can invest a lot of funds in the project. On the other hand, if the goals are not considered, social groups can stop implementation.
		Gender and People Living with Disability Mainstreaming	The consideration of the needs of this group can ensure support of the strategy. But when needs are ignored most funding organizations might not consider involvement. Most international buyers consider buying from players who are mainstreaming needs of the group



		Increased Population	This can lead to an increased market and lower cost of labour. On the other hand, it can lead to too much pressure on water resources and capture fish
		Interaction and Taste and Preference	This grouping can help mobilize resources, do group marketing and production or they can work against investment in fish value chain when the groups prefer other enterprises
4	Technological	ICT Infrastructure	<ul style="list-style-type: none"> <li>• Use of digital platforms will enhance real time dissemination of fish market information and interaction and awareness of benefits of fish. Fluctuations in network coverage in some parts of the country affect communication which is the main activity in marketing. Direct marketing through online platforms can reduce cost and hence price making many to buy fish.</li> <li>• There will be increased demand for the fish and fish products resulting from increased awareness using online marketing will be made affordable as enterprises can easily use paid or owned media to tell consumers about the benefits of food. The development of protocols and enactment of environmental laws can affect the production and marketing of fish and fish products</li> </ul>
	Natural Environment	National Environment Management Policies	The development of protocols and enactment of environmental laws can affect the production and marketing of fish and fish products
		Climate Change and Global Warming	Climate change is adversely affecting Kenya through increased temperatures, unpredictable rainfall, and drought affecting fisheries productivity

5	Legal, and Regulatory Environment	Fisheries Management and Development Act No. 35 of 2016	This Act will address issues affecting fish marketing in Kenya
		Minimum Wage Policy	Affect how much investors can pay workers and can lower or increase cost of fish and fish products
		County Waste management policy	If the policy is well implemented, it can lead to increased consumption if the waste is not well managed, the waste at landing site, markets and processing zone can cause a lot of pollution, and food safety issues as well as deter sales
		Business Law and Policies	Buy Kenya Build Kenya policy, has created a market for Kenyan goods and can create huge sales if well implemented. But most fish from Kenya are too Expensive for the low-income earners. Without check in price, Kenyan fish will be exported while Kenyans feed on low quality imports
		Plastic Packaging Law	The current, this will control how packaging is done and will enable project take care of the environment

## 2.10. SWOT Analysis

The Strategy takes cognizance of the Strengths, Weaknesses, Opportunities and Threats that are critical to the development and advancement marketing of fish. These will guide in focusing on actual interventions to grow fish markets in the prevailing environment; for instance, reducing weakness, leveraging on strength or taking advantage of opportunities as Kenya avoids or mitigates areas of weakness.

STRENGTH	WEAKNESS
<ul style="list-style-type: none"> <li>• Operationalized KFMA, to coordinate and manage marketing of fish and housing the strategy</li> <li>• Skilled Personnel from collaborating partners bringing different experiences in fish and fishery products</li> <li>• Assistance of over 500 landing beaches and infrastructure like Lamu fishing Port, 2 new landing sites</li> <li>• Availability of learning institutions that can develop business and technical skills at farming, trading and processing</li> <li>• Existence of Beach management units supporting service delivery</li> </ul>	<ul style="list-style-type: none"> <li>• Weak data management systems (collection, storage analysis and dissemination).</li> <li>• Declining trends in quantity supplied and traded of fish and fish products.</li> <li>• Few infrastructures that support production and marketing.</li> <li>• Inadequate operational and marketing skills, capacities and facilities of the VCA.</li> <li>• Inadequate specialized curriculum targeting fishers, fish farmers, traders, processors and other stakeholders along the fish value chain</li> <li>• Slow implementation of research recommendations</li> <li>• Low access to funds/resources/funds due to weak or failed management of BMU</li> <li>• Coordinated production and marketing of fish and fish products</li> <li>• Weak data management systems (collection, storage analysis and dissemination).</li> <li>• Appropriate pricing techniques reducing gains</li> </ul>

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• Untapped opportunities in government institutions such as schools and hospital</li> <li>• Willing credible and reliable Partners e.g. Ministries Departments and Agencies</li> <li>• Enabling policy and legal framework- existence of Fish marketing and management Act 2016</li> <li>• Goodwill by the Government</li> <li>• Under exploited capture fisheries in Lake Turkana and EEZ</li> <li>• Ready market as health concerns around the world and population increase shift demand for white meat hence fish</li> <li>• Unexploited/Untapped transport and logistics infrastructure like SGR/airports</li> <li>• Use of ICT in E-Trade and Marketing</li> <li>• Political goodwill through development programs like Big 4 Agenda- manufacturing pillar that promotes value addition of fish and fishery products.</li> <li>• Devolution- expanding the supply of fish and fish products through county engagements</li> <li>• Kenya’s Strategic location as an economic hub in the region</li> </ul>	<ul style="list-style-type: none"> <li>• High cost of production in Kenya</li> <li>• Insecurity limiting dealing in aquaculture</li> <li>• Climate change causing flooding for example Lake Victoria</li> <li>• Lack of Distribution networks in target markets</li> <li>• Narrow Export base (reliance on few countries)</li> <li>• Threats from other country brands for Investments like Rwanda, South Africa</li> <li>• Duplication of export development efforts by different agencies and lack of adherence to the</li> <li>• Diseases affecting fish</li> <li>• Unavailability of real time trade statistics</li> <li>• HIV and AIDS pandemic</li> <li>• IUU fishing in our waters</li> </ul>

## 2.11. Summary of strategic issues

The situational analysis reveals that the fish marketing system faces several challenges. These include

- 1) Limited supply of fish and fishery products to meet domestic, regional and international Demand
- 2) High post- harvest losses of fish and fisheries products
- 3) Low quantities of traded fish and fishery products
- 4) Low value addition of fish and fisheries products
- 5) Inadequate market information for strategic planning and decision making
- 6) Low utilization of innovations and technology in fish and fisheries products
- 7) Low Per Capita consumption of fish and fisheries products
- 8) Inadequate technical capacity and entrepreneurship skills to undertake efficient marketing functions
- 9) Poor governance of marketing organizations, structures and relationships for improved chain performance
- 10) Inadequate harvesting, handling and marketing infrastructure for fish and fishery products
- 11) Limited access to financial and insurance products for fish and fisheries product development
- 12) Non-compliance with safety and other international requirements on fish safety and quality assurance.

3.0



STRATEGIC ISSUES, OBJECTIVES AND  
INTERVENTIONS /ACTIVITIES

### **3.1. Introduction**

This provides for a marketing system from production to consumption/use. It has put in place effective mechanisms for coordination of value chain actors and service providers so as to address the existing gaps of inefficient market information, and ensure there are value-based prices that will lead to equitable profits in the entire fisheries value chain.

This will involve among other things, the establishment of value chain actors' organizations and forums at both National and County Government levels. The smooth coordination will ensure will pave way for effective self-regulating system for value chain actor's organizations / forum guided by the existing government; policies, strategies, regulations and guidelines for competitive marketing

### **3.2. Vision and Mission of the Strategy**

#### **3.2.1. Vision:**

The Vision of the National Fish Marketing Strategy is to grow Kenya's economy for improved livelihood through coordinated fish and fisheries products marketing.

#### **3.2.2. Mission:**

To facilitate increased supply, processing, trading and consumption of quality fish and fisheries products that meet market requirements for income and nutrition of all Kenyans.

### **3.3. Strategic Issues, Objectives and Interventions**

#### **Strategic Objective 1:**

To streamline supply of fish and fisheries products from 149, 722 Metric Tons to 450,000 MT by promoting responsible harvesting and regulating aggregation, processing and distribution. This strategy projects an overall 200% increase in production supply by 2029 from the 2020 production as follows;

- i. Inland fisheries from 104,074 MT to 150,000 MT (44.13% increase)
- ii. Aquaculture fisheries from 19, 945 MT to 150,000 MT (652.07% increase)
- iii. Marine fisheries from 25, 741 MT to 150,000 MT (482.73% increase)

## **Strategic issue 1.1: Limited supply of fish and fishery products to meet domestic, regional and international Demand**

### **Strategy 1.1.1; Improve supply of fish and fisheries products**

- i. Strengthen the technical, organizational and institutional capacity of fish market actors and organizations in fish marketing
- ii. Facilitate collaboration between producers to coordinate supply, achieve scale of production and reduce supply risk
- iii. Contribute in the development/ review of regulations and plans on conservation of fisheries.
- iv. Develop and equip aggregation centers for fish and fisheries products
- v. Promote and enhance capacity on contracting and incentives mechanisms to enhance governance
- vi. Facilitate adoption of production and conservation practices that enhance sustainable utilization of Exclusive Economic Zone (EEZ) resources
- vii. Promote market led incentive models that support ecosystem restoration and biodiversity conservation and utilization of Exclusive Economic Zone (EEZ) resources
- viii. Strengthen surveillance to deter trade on IUU fish and fishery products by focusing on sustainability commitments to traceable fish and fisheries products
- ix. Promote the use of digital technologies to streamline supply of fish and fisheries products

### **Strategic Objective 2**

To increase the quantities of fish traded in the domestic, regional and international markets from 8,372 MT in 2020 to 16,000 MT in 2029

### **Strategic Issue 2.1; Low quantities of traded fish products and fishery**

#### **Strategy 2.1.1; Increase quantities of traded fish and fisheries products**

- i. Generate information on the structure, products and value of domestic, intra-regional and global fish marketing and trade



- ii. Enhance the skills of fish marketing organizations in crafting business strategies to broaden market presence, innovate with new product lines, and enter emerging markets for fresh business prospects
- iii. Promote participation of fish and fisheries product firms/organizations in trade fairs for increased participation and exposure
- iv. Carry out surveillance to enforce compliance with fishing regulations, sustainability initiatives, fish quality and safety requirements for quality assurance and fair trade.
- v. Undertake a scoping study of underdeveloped fish specialty value chains with potential to access regional and international markets
- vi. Develop a policy and certification guidelines to support the fish and fisheries product Specialty sub sector

### **Strategic Objective 3:**

To improve access to relevant fisheries handling and marketing infrastructure including road networks

#### **Strategic issue 3.1: Inadequate harvesting, handling and marketing infrastructure for fish and fishery products including the road network**

##### **Strategy 3.1.1 Develop and support improvement of fish and fisheries production and market infrastructure including auction centers and associated facilities**

- i. Develop and implement guidelines for development of fish handling and marketing infrastructure
- ii. Educate and raise awareness among involved parties about the established guidelines for fish handling and market infrastructure
- iii. Create a comprehensive inventory outlining the needs and specifications for market infrastructure and facilities

- iv. Develop and sustain market infrastructure and facilities tailored to accommodate diverse fish and fisheries products.
- v. Build the capacity of various market players on management of markets and marketing infrastructure
- vi. Map out and profile critical road network infrastructure needs for prioritization and support

#### **Strategic Objective 4**

The goal is to decrease post-harvest losses on fish and fisheries products from 30% to 10%. These losses result from various factors, including delays in preservation, inadequate handling, absence of suitable fish handling and processing facilities, ineffective fishing gear and equipment, and delayed sales.

#### **Strategic issue 4.1: High post- harvest losses of fish and fisheries products**

##### **Strategy 4.1.1: Promote post-harvest and preservation technologies to minimize loss**

- i. Promote climate smart and environmentally sound investment and innovations to address post-harvest losses
- ii. Enhance capacity of fish marketing actors on post-harvest and preservation technologies and innovations
- iii. Facilitate development and awareness of value-based pricing for differentiated fish products
- iv. Enhance mechanisms for food waste management (reduce, recycle, reuse) among fish and fisheries stakeholders

## **Strategic Objective 5:**

To elevate the value of fish and fisheries products to expand market access.

### **Access**

The promotion and implementation of value-added products and innovative processing methods serves as a potent means to elevate both productivity and profitability. The rising interest in sustainable and healthy products, the surge in demand for value-added and convenient items, along with technological advancements in production systems, collectively signal a promising industry poised for significant growth potential

### **Strategic issue 5.1; Low value addition of fish and fisheries products**

#### **Strategy 5.1.1; Promote access to value addition equipment and facilities**

- i. Support investments in green energy e.g. solar, biogas, wind to enhance fish and fisheries products competitiveness and market access

#### **Strategy 5.1.2 Promote value addition for fish and fisheries products**

- ii. Promote product diversification and build capacity on specialty products and certification requirements
- iii. Promote consumption and marketing of value-added fish and fisheries products

## **Strategic Objective 6; Facilitate market access for fish and fisheries products**

### **Strategic Issue 6.1: Inadequate market information for strategic planning and decision making**

#### **Strategy Issue 6.2: Poor governance of marketing organizations, structures and relationships for improved chain performance**

**Strategy 6.1.1. Support the development and implementation of real time Fish Marketing Information System;**

- i. Develop and implement Integrated Fish Marketing Information System
- ii. Facilitate capacity building of stakeholders on the marketing information system
- iii. Promote multi-stakeholder partnerships to support market research and intelligence agenda setting and information sharing within fish and fisheries product marketing landscape
- iv. Carry out periodical market research and intelligence on fish and fisheries products marketing
- v. Implement mechanisms for low-cost, participatory certification systems including weighing standards, packaging and labelling of fish and fisheries products
- vi. Advocate and support favorable taxation regimes that facilitate entry into regional and global markets

**Strategy 6.2.1: Strengthen the organizational and institutional capacity of Market organizations and structures**

- i. Support collaboration initiatives to manage uncertainties about the supply of resources
- ii. Promote the utilization of digital platforms to enhance chain governance efficiency
- iii. Capacity building of fish and fisheries organizations such as BMUs and enterprises

**Strategic Objective 7; Promote the digitization of the fish marketing environment to optimize efficiency and effectiveness**

The fisheries industry is in the midst of a digital revolution, incorporating various technologies across its entire value chain. From market intelligence, traceability and inventory management to online marketplaces and E-commerce platforms, digital solutions are elevating operational efficiency. Embracing this digital transformation offers a competitive advantage to stakeholders within the industry by availing accurate and timely operational, market information and intelligence.

**Strategic Issue 7.1: Low utilization of innovations and technology in fish and fisheries product marketing**

**Strategy 7.2.1; Promote the development, nurturing, and implementation of innovations and technologies through incubation to boost their success**

- i. Create awareness on opportunities for development of market innovations
- ii. Develop an incubation curriculum to support training, coaching and mentorship of fish and fisheries product enterprise
- iii. Support incubation of fish and fisheries small and medium enterprises

**Strategic Objective 8:**

Promoting sustainable fish consumption aims to provide a healthy diet for everyone while reducing the negative environmental impact of consumption systems. It involves optimizing resource use, improving energy efficiency, and ensuring access to basic services. In this strategy, the focus is on increasing National per capita consumption from 3.6 kg to 8 kg by 2029, addressing under-consumption, and managing waste to minimize environmental harm

**Strategic issue 8.1: Low Per Capita consumption of fish and fisheries products**

**Strategy 8.1.1: Promote consumption of fish and fisheries products**

- i. Undertake an assessment to determine County Specific Per Capita Fish Consumption and demand gap
- ii. Promote behavior change to increase consumption of fish and fisheries products through awareness campaigns, and development of recipes and transfer of food preparation skills;
- iii. Promote digital food platforms for procurement of safe, nutritious, and affordable fish and fisheries products
- iv. Promote cultural food / harvest festivals integrated into national and county government plans;

### **Strategy 8.1.2; Poor Waste management, food loss and waste (FLW) management**

- i. Enhance investment and innovations to reduce Food Loss and Waste (FLW)
- ii. Enhance mechanisms for food waste management (reduce, recycle, reuse) among stakeholders;

### **Strategic Objective 9:**

To enhance technical capacity, organizational and entrepreneurship skills among staff and value chain actors on markets and marketing

### **Strategic Issue 9.1: Inadequate technical capacity and entrepreneurship skills to undertake efficient marketing functions**

#### **Strategy 9.1.1; Develop and roll out capacity building guideline on marketing**

- i. Capacity building of extension service providers on the marketing guidelines
- ii. Capacity building of value chain actors on technical and entrepreneurial skills

### **Strategic Objective 10: To enhance access to financial services and insurance products for fish marketing**

Securing credit is a critical concern for numerous stakeholders in the fisheries industry. Access to credit facilitates regular operations and allows investments in infrastructure upgrades, enhancing production efficiency and post-harvest procedures.

This ultimately reduces losses after harvest and ensures a consistent supply of high-quality products to the market. In the marketing landscape, finance accessibility has grown increasingly crucial to meet market demands, especially in quality control, requiring higher investment levels

### **Strategic Issue 10.1: Limited access to financial and insurance products for fish and fisheries product development**

#### **Strategy 10.1.1: Facilitate linkages to financial and insurance service providers**

- i. Provide real time data to support development of innovative financing and insurance models that are appropriate to support marketing of fish and fisheries products at local, regional and international markets
- ii. Organize business to business meetings to facilitate linkages to financial and insurance service providers
- iii. Pilot existing subsidy schemes to support marketing of fish and fisheries products

**Strategic Objective 11; To promote compliance with safety and other international requirements on fish safety and quality assurance.**

**Strategic issue 11.1: Non-compliance with safety and other international requirements on fish safety and quality assurance.**

**Strategy 11.1.1: Promote adoption of set market requirements**

- i. Raise awareness and enhance the capabilities of all involve stakeholders on fish safety and quality assurance.
- ii. Strengthen collaboration structures at the national and county levels for coordination and enforcement of market requirements on fish safety and quality assurance

**Strategic Objective 12; To promote Social equity, inclusion and participatory governance in the marketing of fish and fisheries products**

The Constitution of Kenya 2010 (Article 43, Article 21) upholds the socio-economic and cultural rights of all citizens, emphasizing the needs of marginalized groups like women, youth, persons with disabilities, and minority communities.

This strategy prioritizes human and social values, aiming to rectify gender disparities by creating opportunities for vulnerable groups. In the fish and fisheries product marketing sphere, disparities in resource distribution and power result in unequal market access.

This strategy tackles two pivotal issues for social equity and responsibility within the fish marketing ecosystem: ensuring rights to productive resources and services for vulnerable groups and empowering social and political movements to foster a more equitable value chain

**Strategic Issue 12.1; Low access and control to productive resources by women, youth, vulnerable groups, marginalized groups and indigenous communities**

**Strategic issue 12.2; Disparities exist in the involvement and substantial engagement within the marketing of fish and fisheries products**

**Strategy 12.1.1: Facilitate access and control to productive resources by women, youth, vulnerable groups, marginalized groups and indigenous communities**

- i. Strengthen mechanisms that guarantee secure access to productive resources required for market access
- ii. Scale up interventions which would allow women as well as men to better combine reproductive and productive work
- iii. Promote labor saving technologies that meet needs of women and men and also other vulnerable groups;
- iv. Promote the development and scale up of financial products that meet the needs of vulnerable groups.

**Strategy 12.2: Enhance equitable participation and meaningful engagement in fish and fisheries product marketing**

- i. Strengthen participatory fish value chain governance to address power inequalities
- ii. Increase the capacity of communities for engagement in the fisheries sub sector' decision making policy processes.
- iii. Promote, guide and develop gender mainstreaming guidelines for awareness creation and capacity building

**Strategic Objective 13; To improve the enabling environment for fish marketing**

The marketing of fish and fisheries products requires an appropriate enabling environment and appropriate incentives to overcome structural constraints that perpetuate unsustainable and inequitable models of marketing.



## **Strategic issue 13.1; Weak policy, legal and institutional framework**

### **Strategy 13.1.1;**

- i. Enhance policy coherence to eliminate obstacles and biases that work against access to regional and international markets
- ii. Support counties to domesticate and implement National fish marketing strategy
- iii. Establish multi-sectoral coordination mechanism to facilitate the implementation of the strategy

4.0

---

INSTITUTIONAL AND  
LEGAL FRAMEWORK

## 4.1. Introduction

The Constitution provides for the national legislation and the protection of the common markets in respect of the mobility of goods, services, capital and labor. Further, the constitution provides for the role of the county governments in trade development.

Fisheries Management and Development Act of 2016, has provided for establishment of the Kenya Fish Marketing Authority (KFMA) to spearhead competitive marketing of Kenyan fish and fish products. The desired goal of the Authority is to work with other institutions and organizations to create an enabling environment for competitive fish marketing.

## 4.2. Fish marketing Partners and Collaborators

The national and county governments' role in regard to National Fish Marketing Strategy is to facilitate services and provide an enabling environment to enhance competitiveness of fish and fishery products at local, regional, national and international markets. In implementing this Strategy, different actors will play the following roles.

### 1) Private Sector

Kenya Fish Marketing Authority will collaborate with national and county governments in the implementation of this strategy. Some of the private sector actors in marketing fish and fish products are;

- 1) Kenya Private Sector Alliance (KEPSA)
- 2) Association of Fish Processors and Exporters of Kenya (AFIPEK) Association of Kenya Insurers (AKI)
- 3) Fish Cooperative Societies
- 4) Commercial Aquaculture association of Kenya
- 5) Aquaculture Association of Kenya
- 6) Kenya Wavuvi Association

## 2) Development partners

Bilateral and multilateral development partners are potential providers of financial and technical support for marketing of fish and fishery products in collaboration with county and national governments.

## 3) Civil Societies

The civil societies are powerful platforms for lobbying and advocacy on the financing and implementation of this strategy to support the marketing of fish and fish products

### 4.3. Partners and their Roles and Mandates

NAME OF INSTITUTION	ROLES AND MANDATES
<b>NATIONAL GOVERNMENT</b>	
The National Treasury and Economic Planning	<ul style="list-style-type: none"><li>➤ Disburse government funds to the KFMA.</li><li>➤ Advisory on taxation (exemptions)</li><li>➤ Financing and advisory services</li></ul>
Ministry of Foreign and Diaspora Affairs	<ul style="list-style-type: none"><li>➤ Promote and protect Kenya’s interests and image regionally and internationally.</li><li>➤ Responsible for international relations on trade and cooperation</li></ul>
Ministry of Trade, Investment and Industry.	Promote industrialization, trade and enterprise development.
Ministry of Cooperatives and Micro, Small and Medium Enterprises (MSME) Development	<ul style="list-style-type: none"><li>➤ Cooperative policy, standards and implementation</li><li>➤ Promote SMEs policy</li><li>➤ Administration of the “Hustler fund” for the promotion development and enhancing competitiveness of MSMEs</li></ul>

	<ul style="list-style-type: none"> <li>➤ Capacity development for entrepreneurship including access to modern management practices</li> <li>➤ Marketing development for SMEs products and services (Better access to domestic and export markets)</li> </ul>
Office of Deputy President; Office of Devolution and Intergovernmental Affairs	<ul style="list-style-type: none"> <li>➤ For intergovernmental relations between the national and the county governments.</li> <li>➤ Infrastructure Development</li> <li>➤ Enforcing Co-operations with partners</li> </ul>
Ministry of Mining, Blue Economy and Maritime Affairs	<ul style="list-style-type: none"> <li>➤ Coordinates a development of Oceans and Blue Economy strategy and policy</li> <li>➤ Fisheries and Aquaculture policy</li> <li>➤ Coordination of the development of policy, Legal, Regulatory and Institutional Framework for the fisheries industry and the Blue Economy</li> <li>➤ Fisheries Marketing policy</li> <li>➤ Policy on development of fishing port and associated infrastructure</li> <li>➤ Capacity building for sustainable exploitation of Agro-based marine resources</li> <li>➤ Protection of aquatic ecosystem</li> <li>➤ Promotion of Kenya as centre of Aquaculture</li> <li>➤ Economic development-oriented fisheries research</li> </ul>
Ministry of Agriculture, Livestock development	<ul style="list-style-type: none"> <li>➤ National agriculture policy and management</li> <li>➤ National food policy</li> <li>➤ Strategic food reserves</li> <li>➤ Agricultural financing</li> <li>➤ Farmers training</li> </ul>

Ministry of Health	<ul style="list-style-type: none"> <li>➤ Responsible for administration of Public Health Act.</li> </ul>
Ministry of Roads and Transport	<ul style="list-style-type: none"> <li>➤ Transport policy management</li> <li>➤ Mechanical and transport services</li> <li>➤ National roads development policy</li> <li>➤ Civil aviation management and training</li> </ul>
Ministry of Lands, Public works, Housing and Urban Planning	<ul style="list-style-type: none"> <li>➤ National lands Policy and Management.</li> <li>➤ Physical planning and land use.</li> <li>➤ Land transactions.</li> <li>➤ Land settlement Policy and Management</li> <li>➤ Maintenance of Public land bank</li> <li>➤ Administration of public land as designated by the constitution</li> <li>➤</li> </ul>
Ministry of East African Community (EAC) the ASAL and Regional Development	<ul style="list-style-type: none"> <li>➤ Policy on East African Community</li> <li>➤ East African Community affairs</li> <li>➤ Implementation of East African treaty</li> <li>➤</li> </ul>
Ministry of Labour and Social Protection	<ul style="list-style-type: none"> <li>➤ Social protection policy.</li> <li>➤ Special programmes.</li> <li>➤ Relief food management and humanitarian emergency response.</li> <li>➤ National labour and employment policy management.</li> <li>➤ Labour and social protection policy and Programme implementation.</li> <li>➤</li> <li>➤</li> </ul>

Kenya Fisheries Service	<ul style="list-style-type: none"> <li>➤ Regulation of fisheries operators</li> <li>➤ Implementation of fisheries management and development Act 2016;</li> </ul>
Kenya Marine Fisheries and Research Institute	<ul style="list-style-type: none"> <li>➤ Responsible for fisheries research</li> </ul>
Kenya Maritime Authority	<ul style="list-style-type: none"> <li>➤ Certification of seaworthiness of water transport vessels.</li> </ul>
Kenya Airports Authority	<ul style="list-style-type: none"> <li>➤ Provides facilitative infrastructure for aviation services between Kenya and the outside world.</li> </ul>
Kenya Railways Corporation	<ul style="list-style-type: none"> <li>➤ Provision of movement of fish and fish products.</li> </ul>
Kenya Revenue Authority	<ul style="list-style-type: none"> <li>➤ Collecting revenue on behalf of the Government of Kenya.</li> </ul>
Kenya Investment Authority	<ul style="list-style-type: none"> <li>➤ Advocating and providing accurate information on investment opportunities in fish marketing.</li> </ul>
Kenya Bureau of Standards	<ul style="list-style-type: none"> <li>➤ Provide standardization on fish and fish products.</li> </ul>
Export Processing Zones Authority	<ul style="list-style-type: none"> <li>➤ Assist firms in setting up fish marketing businesses in EPZ zones</li> </ul>
Kenya Export Promotion and Branding Agency	<ul style="list-style-type: none"> <li>➤ Promote fish and fish products locally and internationally</li> <li>➤ Branding Kenyan Fish and fish products for improved market access</li> </ul>
National Environment Management Authority	<ul style="list-style-type: none"> <li>➤ Ensure clean, healthy, and sustainable environment for improved supply and marketing of fish and fish products</li> </ul>
Kenya Wildlife Service	<ul style="list-style-type: none"> <li>➤ lead institution in coordinating enforcement of the convention on international trade in endangered species (CITES) of fauna and flora.</li> </ul>
KenTrade	<ul style="list-style-type: none"> <li>➤ Facilitate cross border trade in fish and fish products.</li> </ul>

<b>COUNTY GOVERNMENTS</b>	
County Governments	➤ Enforcement of regulations and standards on fish and fishery products.
	➤ Trade development and regulation
	➤ Promotion of market access for fish and fishery products.
	➤ Provision of infrastructure to promote fish and fish products marketing, agro- processing and value chains development
	➤ Enhancing accessibility to affordable credit and insurance packages
	➤ Developing, enacting and implementing county legislation and regulatory frameworks for fish marketing
	➤ Implementation of national fish marketing policies and legislations
	➤ County fish health certification
	➤ Development and maintenance of fish landing stations and jetties, fish auction centres
	➤ Issuance of fish trade, local processing licenses and fish movement permits
<b>PRIVATE SECTOR</b>	●
Kenya Private Sector Alliance	➤ Provide forum for engagement within the fish value chain to influence policy on fish production and marketing ➤ Champions trade, investment and industrial relations
Association of Fish Processors and	➤ Lobbying and advocacy to promote the interests of fish exporters and processors



Exporters of Kenya (AFIPEK)	➤ Capacity building members on processing and export of fish and fish products
Association of Kenya Insurers (AKI)	Managing risks and costs of fish and fish product businesses
DEVELOPMENT PARTNERS	Bilateral and multilateral development partners are potential providers of financial and technical support for marketing of fish and fishery products in collaboration with county and national governments.
CIVIL SOCIETIES	The civil societies are powerful platforms for lobbying and advocacy on the financing and implementation of this strategy to support the marketing of fish and fish products.
<b>FARMERS AND FISHERFOLK ORGANIZATIONS</b>	
East Africa Farmers Federation (EAFF)	<ul style="list-style-type: none"> <li>➤ Voice legitimate concerns and interests of fisher folk and farmers with the aim of enhancing regional cohesiveness and social-economic status of the farmers.</li> <li>➤ Promote regional integration through trade.</li> </ul>
Aquaculture Association of Kenya (AAK)	<ul style="list-style-type: none"> <li>➤ AAK is the National umbrella body for all fish farmers in Kenya and so articulates issues affecting its members and the aquaculture industry at large.</li> <li>➤ Linking the farmers at national and county governments levels with development partners, and other farmer organizations and stakeholders</li> </ul>
Commercial Aquaculture Society of Kenya (CASK)	➤ CASK is the National membership organization for all Commercial aquaculture value chain actors.

	<ul style="list-style-type: none"> <li>➤ Ensures high quality inputs and best management practices for the sector</li> </ul>
Kenya Wavuvi Association	This is a national fisheries association that takes care of the interests of fishers in Kenya.
Kenya National Farmers Federation (KENAFF)	<ul style="list-style-type: none"> <li>➤ KENAFF is an umbrella organization of all farmers in Kenya that help in articulating issues affecting them through focused lobby and advocacy;</li> <li>➤ Targeted capacity building and promotion of sector stakeholders' cohesiveness in dispensing and progressive uptake of agricultural innovations for enhanced socio-economic status of the farmers.</li> </ul>
Agricultural Industry Networks	(AIN) is a business Member Organizations (BMOs) representing key players along the entire value chain and is therefore a voice of the Agricultural Sector.
National BMU Network	<ul style="list-style-type: none"> <li>➤ The BMU network is an association of the Beach Management units in the Fisheries sector that take care of the interests of fisheries actors in Kenya.</li> <li>➤ This is key in co-management of fisheries resources in the country.</li> </ul>

5.0



IMPLEMENTATION  
FRAMEWORK

#### 4.4. Implementation Plan Matrix

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
Strategic Pillar 1: Supply of fish and fishery products						
Strategic Objective 1: To achieve sustainable supply of fish and fishery products to meet domestic, regional and international demand						
Strategic Issue 1.1: Limited Supply of Fish and Fishery products to meet domestic, regional and international demand						
Strategy 1.1: Improve supply of fish and fisheries products						
Collaborate with other relevant agencies to implement fisheries laws, regulations, policies, strategies and plans for conservation of fisheries.	Stakeholder mapping	Number of stakeholder mappings done	Stakeholder mapping report	KFMA, SDFA&BE, KeFS, FLTF, SDT&I, KFIC, County Governments	220,000,000	10
	Stakeholder meetings and sensitization	Number of stakeholder sensitization meetings held	Sensitization report			
	Action planning and budgeting	Number of action plans and budgets developed	Action plan and budget document			
	Facilitate the development of MOUs on collaboration	Number of MOUs on conservation of fisheries done	Signed MOUs on conservation and development of fisheries			

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
	Facilitate development of regulations and plans on conservation of fisheries	Number of regulations and plans developed through collaboration	Regulations and plans developed			
Promote collaborations in aquaculture development as an alternative source of fish and fisheries products	Incentives to improve efficiency in aquaculture production and marketing	Percentage reduction in the cost of production and marketing	Financial analysis reports Market analysis reports	KFMA, SDFA&BE, KeFS, FLTF, ABDP, KFMFRI, KIBT, KFIC, County Governments	5,282,500,000	10
	Technical and entrepreneurial training of aquaculture value chain actors	Number of aquaculture value chain actors trained	Training reports			
Promote collaboration in; research, investments, innovations and technologies	Provide linkage of value chain actors to financiers  KFMA	Number of market research done for; tilapia, Nile perch, omena, alestes, shrimps and catfish conducted	Market analysis report	KFMA, SDFA&BE, KeFS, FLTF, KFMFRI, ADBP, KIBT, KIRDI, Financiers, BMUs, County Governments	315,256,312.50	10
		Number of investment opportunities prioritized	Investment opportunity reports			

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
		Number of VCAs trained on viable investments, innovations and technologies	Training reports			
		Number of VC actors accessing financial products	Reports on VCAs accessing financial products			
Collaborate in promotion of Exclusive Economic Zone (EEZ) resources utilization	Investment opportunity analysis for EEZ resources	Number of investment opportunities identified	Fisheries investment opportunities reports	KFMA, SDFA&BE, KeFS, FLTF, KIBT,KMA, KFIC, SDT, KENIVEST	120,000,000	10
	Provide investment information/ guideline for investments in the EEZ Market linkages for EEZ fish	Functional market linkages with local, regional and international markets established	Market linkage reports	KEPROBA, KMFRI, County Government		

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
Promote aggregation of fish and fish products	Training of fish value chain actors on business management skills, fish handling and cluster management	Number of fish value chain actors trained	Training reports	KFMA, KIBT, SDFA&BE, KeFS, FLTF, KFMFRI, ABDP, County Governments	260,000,000	10
	Resource mobilization for aggregation / fish handling infrastructure	Number of resource mobilizations proposals developed (funded)	Resource mobilization reports			
	Market Linkage through business- to-business meetings/fairs / exhibitions and shows	Number of business-to-business linkage meetings held	Business linkage reports			
Promote collaborations to deter trade in IUU fish and fishery products	Mapping of Stakeholders combating trade in IUU fishing	Number of stakeholders combating IUU fishing mapped.	Stakeholder maps	KFMA, SDFA&BE, KeFS, FLTF, KMFRI, KMA, police, SDT&I, Judiciary, BMU,	1,460,000,000	
	Assess current IUU fishing practices in each fishery	Number of IUU fishing practices in each fishery identified.	IUU fishing reports			

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
	Meetings with partners to discuss report on IUU fishing	Number of meetings held	Minutes of the meetings / reports	Public health and sanitation, KWS, MFA, W&I, 1st schedule Part d of FMDA 2016, International collaborators (FAO, IORA, IOTC, LVFO), County Government		
	Support the tracking of all fishing vessels	Number of fishing vessels fitted with tracking devices	Tracking reports Training reports			
	Training of Staff and BMUs on combating IUU fishing	No of staff / BMUs trained	Training reports			
	Develop MoUs for to combat IUU fishing	Number of MoUs signed to deter IUU	MOUs on IUU deterrence			
	Development of traceability mechanisms to deter IUU fishing	Number of traceability schemes developed	Traceability system in use			
Collaborate to promote trade facilitation: taxes, levies, and other non- tariff barriers	Develop trade frameworks to facilitate trade	Number of cluster meetings held	Meeting minutes / reports	KFMA, SDFA&BE, KRA,	230,000,000.00	



Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
	Dissemination of trade facilitation framework report to relevant partners	Number of partners reached on trade facilitations framework developed	Framework report	SGR, KPLC,SDT&I, Transporters representative, KeNHA, Public Health, Courier services representatives, KAA, KeFS, FLTF, VCAs, County Governments		
Strategic pillar 2: Quantities of fish and fisheries products traded						
Strategic Objective 2: Increase the quantities of fish traded in the domestic, regional and international markets						
Strategic Issue 2.1: Low quantities of traded fish and fisheries products						
Strategy 2.1: Increase quantities of traded fish and fisheries products						
Fish value chain development for different fish species	Rapid value chain analysis for 20 fish species	Number of surveys done	Value chain analysis reports	KFMA, SDFA&BE,	1,974,729,128	10

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
	Develop action plans for Vc development	Number of action plans developed	VC action plans	KFIC, KeFS, KFMFRI, KIBT, SDT&I. County Governments		
	Support implementation of value chain analysis recommendations	Number of interventions implemented	Implementation reports			
Promote distribution mechanisms for fish and fishery products for market systems development	Mapping of fish distribution/ trade routes and destination markets	Number of markets mapped	Mapping report	SDT&I, KFMA, SDFA&BE, KFIC, KeFS, KFMFRI, SDT & ED, County Governments	1,383,568,179	10
	Support operationalization of fish selling outlets	Number of markets outlets operationalized	Outlets operation reports			
	Capacity building of fish market management committees on information management	Number of market management committees trained	Number of market management trained			
	Lobby and advocate for smooth distribution of fish from production to target markets	Number of functional market linkages created	Lobbying and advocacy reports			

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
	Promote Participation of fish and fisheries product firms/ organizations in trade fairs for increased participation and exposure			KFMA, SDBEF, KFIC, KeFS, KFMFRI, SDT & ED, County Governments		
	Carry out surveillance to enforce compliance with various regulations	Number of violations reported	Compliance report			
	Promote Kenyan fish and fisheries specialty products	Number of specialty products promoted	Specialty products promotion report			
<b>Strategic Pillar 3: Fisheries handling and marketing infrastructure including transport infrastructure</b>						
<b>Strategic Objective 3: To improve access to relevant fisheries handling and marketing and marketing infrastructure including transport infrastructure</b>						
<b>Strategic Issue 3: Inadequate harvesting, handling, marketing and transport infrastructure for fish and fishery products</b>						
<b>Strategy 3.1: Develop and support improvement of fish and fisheries production and market infrastructure including auction centres, access roads and associated facilities</b>						
Develop and implement guidelines for the development fish marketing infrastructure;	Benchmarking on best practices in other countries/ counties	Number of counties/ countries bench marked	Benchmarking report	KFMA, SDBEF, KeFS, KFMFRI, SDT&I, KIE,	55,000,000	10

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
	Develop fish marketing infrastructure guidelines.	Number of guidelines developed	Final guideline for fish infrastructure guideline	KeBS, County Governments		
Improvement of fish and fisheries production and market infrastructure	Mapping of existing infrastructures and facilities across the country	Fisheries production and marketing infrastructure map	Mapping report Infrastructure	KFMA, SDBEF, KeFS, KFMFRI, SDT&I, KeBS, County Governments, banks, insurance companies	12,320,000,000	10
	Development and improvement of market infrastructure (marketing outlets) including 2 fish auction centres (in Mombasa and Kisumu)	Number of market centres infrastructure improved	Development report			
	Promotion of Public-Private / Collaborative arrangements in the development and	Number of fish auction centres developed and	MOUs signed			
Number of open fish market outlets constructed						

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
	maintenance of fish market infrastructure	Number of collaborations meetings to improved fish handling infrastructure				
	Development of fish aggregation centres (landing sites), and marketing shades	Number of aggregation centres infrastructure and Fish landing sites developed	Landing sites development report			
	Investment of incomes generated from fish trade in maintaining marketing infrastructure		Increased volume of trade in fish and fishery products			
	Lobby for improvement of access roads to fish production, processing and trading centers	Number of lobby groups meetings organized				

Strategic Pillar 4: Post harvest losses of fish and fish products

Strategic Objective 4: Decrease postharvest losses of fish and fisheries products

Strategic issue 4: High postharvest losses of fish and fisheries products

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
Strategy 4.1: Promote postharvest and preservation technologies to minimize loss						
Promote use of innovations and technologies to address post- harvest losses	Identify innovations and technologies for value addition	Number of innovations and technologies identified	Mapping reports	KIBT, KFMA, KEPROBA, KIPI, KIBT, SDBEF, KFIC, KeFS, KFMFRI, County Governments	401,336,776	10
	Training Value chain actors on innovations, appropriate technologies on fish handling and safety to reduce chain losses;	Number of VCAs trained	Training reports			
	Collaborate in the development of appropriate packaging of fish and fish products	Number of packaging methods developed for fish and fish products	Reports on packaging methods			
Promote value- based pricing for differentiated fish and fishery products	Develop value chain pricing plan at each value chain node	Number of pricings mechanisms developed	Report on value chain price plan	KIBT, KFMA, SDT, SDBEF, KFIC, KeFS, KFMFRI, County Governments	500,000	10
	Support development of differentiated fish products	Number of products developed	Report on product differentiated			

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
	Mentorship and consultation of VCAs on enterprise analysis and pricing	Number of actors trained on costing and pricing	Report on mentorship and consultations			
Promote cold chain management operations	Support partnerships and collaboration in cold chain infrastructure development	Number of functional partnerships on cold chain infrastructure development initiated	Partnership reports	KFMA, SDBEF, KFIC, KeFS, Financial Institutions, GOK Loans, KFMFRI, County Governments	1,270,000,000	10
	Train value chain actors on cold / Supply chain management	Number of VCAs trained on cold / Supply chain management	Training reports			
	Financing of cold chain infrastructure	Number of VCAs linked to financiers for cold chain financing	Financing reports			
Post-harvest technologies training	Train VCA on post-harvest technologies	Number of actors trained	Training reports	KFMA, SDFA&BE, KFIC, KeFS, KFMFRI, County Governments	1,000,000	10

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
Food waste management	Sensitize Value Chain Actors on food waste management	Sensitization forums held	Number of fora held	KFMA, SDFA&BE, KFIC, KeFS, KFMFRI, County Governments	1,000,000	10
Strategic Pillar 5: Value addition of fish and fisheries products						
Strategic Objective 5: Improve the value of fish and fisheries products to expand market access						
Strategic issue 5: Low value addition of fish and fisheries products						
Strategy 5.1: Promote value addition						
Promote access to appropriate value addition facilities and equipment	Identify value addition technology and innovations gaps	Gaps identified	Report on gaps identified	KFMA, SDFA&BE, KFIC, KeFS, KFMFRI, County Governments		
	Develop and implement bulk purchasing models for value addition equipment's and facilities	Value addition equipment purchased	Report on value addition equipment purchased			
	Develop and implement business models for value	Number of business models adopted	Report on number of			



Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
	addition for fish and fisheries products		business models adopted			
	Promote consumption and marketing of value-added fish and fisheries products	Number of awareness materials developed	Report on awareness creation			
	Promote product diversification and build capacity on specialty products and certification requirements	Number of products diversifications	Report on product diversification and capacity building			
Strategic Pillar 6: Market access for fish and fisheries products						
Strategic Objective 6: Facilitate market access for fish and fisheries products						
Strategic issue 6.1: Inadequate market information system						
Strategy 6.1: Support the development and implementation of a fish marketing information system						
Support the development of real time fish marketing information system	Map out information needs of value chain players	Number of players	Report	KFMA, SDFA&BE,	700,000,000	10

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
	Carry out periodical market research and intelligence on fish and fisheries products	Number of market research done	Market research report	KFIC, KeFS, KFMFRI, County Governments		
	Develop and implement integrated Fish marketing information systems	Number developed	Report on Fish marketing information systems developed			
	Facilitate capacity building of stakeholders on market information system	Number of stakeholders trained	Report on stakeholders training			
Promote uptake and use of the MIS	Awareness creation and training on usage of stakeholder (BMUs and fishermen)	Number of BMUs and fishermen trained.	Training reports			
<b>Strategic Pillar 7: Digitization of the fish marketing environment</b>						
<b>Strategic Objective 7: Promote the digitization of fish marketing environment to optimize efficiency and effectiveness</b>						
<b>Strategic issue 7: Low utilization of innovations and technologies in fish and fisheries products marketing</b>						

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
Strategy 7.1: Promote the development, nurturing and implementation of innovations and technologies						
Promote use of modern innovations and technologies that support marketing of fish and fishery products	Identify e-marketing techniques available locally and internationally	E-marketing techniques identified	Report	KFMA, SDFA&BE, KFIC, KeFS, KFMFRI, County Governments	50,000.000.00	10
	Train VCAs on e-commerce and e marketing	Number of VCA trained	Training reports	KFMA, SDFA&BE, KFIC, KeFS, KFMFRI, County Governments		
	Link fish aggregation centres to e-marketing platforms	Number of fish aggregators linked	Report	KFMA, SDFA&BE, KFIC, KeFS, KFMFRI, County Governments		
	Create awareness on opportunities for development of market innovations	Number of awareness creation forums organized	Awareness creation reports	KFMA, SDFA&BE, KFIC, KeFS,		

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
				KFMFRI, County Governments		
	Develop an incubation curriculum to support fish and fisheries enterprises	Curriculum developed	Curriculum development report	KFMA, SDFA&BE, KFIC, KeFS, KFMFRI, County Governments		
Strategic pillar 8: Consumption of fish and fisheries products						
Strategic objective 8: Promote sustainable fish consumption						
Strategic issues 8: Low per capita consumption of fish and fisheries products						
Strategy 8.1: Promote consumption of fish and fisheries products						
Determine per capita fish consumption and demand gap in all the Counties	Conduct consumer surveys	Number of consumer surveys conducted	Consumer Survey report	KFMA, SDFA&BE, KeFS, KFMFRI, SDT&I, KeBS, KIBT, County Governments	120,000,000	10
	Gap analysis to gauge per capita consumption in 47 counties and report compilation	Number of consumer preferences established	Consumers' preference report			

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
Enhance demand for fish through “eat more fish campaigns”	Advocate eating of fish for health in schools as part of government policy / directive to create future fish markets	All schools with feeding programs adopt government policy/directive on eat fish for health	Government directive document on eating fish for health in schools with feeding programs	KFMA, SDFA&BE, KeFS, KFMFRI, SDT&I, KIBT, KeBS, County Governments	350,000,000	10
	Strengthen fish consumption outlets	Number of fish selling outlets operationalized	Report on performance of fish selling outlets			
	Develop fish and fishery products that meet market demands	Number of marketable fish products developed	Report on fish and fishery products developed			
Strategic pillar 9: Technical capacity and skills						
Strategic objective 9: Enhance technical capacity and skills among staff and value chain actors for improved marketing						
Strategic issue 9: Inadequate technical capacity and entrepreneurship skills in fish marketing						
Strategy 9.1: Enhance capacity of various market players						

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
	Mobilizing the participants and conducting TNA on existing occupational standards	Number of VCAs mobilized and Training Needs Assessments done	Training Needs Assessments reports	KIBT, KFMA, SDFA&BE, KeFS, KFMFRI, SDT&I, KeBS, County Governments		10
	Develop and update practical training curricula and modules based on existing occupational standards	Number of training curricula developed Number of modules developed	Updated curricula and training modules			
	To establish and strengthen	Number of centres	Report on centres strengthened			
	practical learning centres for fish and fisheries product Service providers and value chain actors (MSMEs)	training on fish trade matters strengthened / improved	Improvement report			

Strategic pillar10: Financial services and insurance products

Strategic objective 10: Enhance access to financial services and insurance products for fish and fisheries products

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
Strategic issue 10: Limited access to financial and insurance products for fish and fisheries products product development						
Strategy10.1: Facilitate linkages to financial and insurance service providers						
Promote financial and insurance products	Provide real data to support development of innovative financial and insurance products	Number of data sets provided	Report on data provided	KFMA, SDBEF, KeFS, KFMFRI, SDT&I, County Governments	10,000,000	10
	Organize business to business meetings to facilitate linkages to financial and insurance providers	Meetings organized	Number of meetings organized			
	Develop and implement insurance subsidy scheme to support marketing of fish and fish products	Subsidy policy uptake	Number of policies sold			
Strategic Pillar 11: Food safety and other international requirements on fish and fisheries products safety and quality assurance						
Strategic Objective 11: To promote compliance with safety and other international standards on food safety and quality assurance						
Strategic Issue11: Noncompliance with safety						

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
Strategy 11.1: Promote compliance with set standards						
Enhance capacity for compliance with set market requirements	Participate and promote development of standards	Standards developed	Number of standards developed	KFMA, SDFA&BE, KeFS, KFMFRI, SDT&I, KeBS, County Governments	15,000,000	10
	Raise awareness and capacity build value chain actors on standards	Trainings offered	Number of trainings done			
	Support surveillance to enforce compliance	Recorded violations	Number of violations			
	Develop and strengthen structures for coordination of enforcement	Structure for coordination developed	Coordination structure developed			
Strategic pillar12: Access and control to productive resources						
Strategic objective 12: Promote social equity, inclusion and participatory governance in marketing of fish and fisheries products						
Strategic issue 12: Low access and control to productive resources by women, youth, vulnerable groups. Marginalized groups and indigenous communities						
Strategy12.1: Increase the participation of disadvantaged groups in fish value chain						



<b>Strategic Interventions</b>	<b>Activities</b>	<b>Measure of Achievement</b>	<b>Indicators</b>	<b>Implementing agency</b>	<b>Cost (Kshs)</b>	<b>Timeframe</b>
Collaborate to increase the participation of disadvantaged groups in fish value chain	Training of vulnerable VCA on entrepreneurship skills	Number of vulnerable VCA trained on entrepreneurship skills	Training reports	KFMA, SDBEF, KeFS, KFMFRI, ABDP, SDI, KIBT, County Governments	20,000,000	10
	Sensitization of value chain actors on HIV/AIDS	Number of value chain actors trained on HIV/AIDS	Training reports	KFMA, SDFA&BE, KeFS, NACC, County Governments, MoH.		
	AIDS Prevalence and its effect on investment			County Governments, MoH.		
	Conduct Rapid surveys on climate change preparedness, adaptation and mitigation measures	Number of climate change preparedness and adaptation measures conducted	Rapid survey reports	KFMA, KeFS, SDBEF, MICC		

Strategic Interventions	Activities	Measure of Achievement	Indicators	Implementing agency	Cost (Kshs)	Timeframe
Strategy 12.2: Build resilience of fish operators to address negative environmental effects						
Collaborate to cushion fish value chain actors against the impacts of climate change	Conduct Rapid surveys on climate change preparedness, adaptation and mitigation measures	Number of climate change preparedness and adaptation measures conducted	Rapid survey reports	KFMA, SDFA&BE, KeFS, KFMFRI, Meteorological Department, County Governments	150,000,000	10
	Identify areas of partnerships and collaboration in partnerships on key areas of climate change mitigation	Number of partnerships identified, and collaborations created on climate change mitigation and adaptation	Reports on partnerships			
<b>Total Strategy Implementation Cost</b>					<b>26,839,890,395.50</b>	

6.0



MONITORING AND  
EVALUATION

### 6.1. Monitoring and Evaluation (M&E)

Monitoring and Evaluation (M&E) are important aspects in the implementation of this Strategy. Monitoring ensures that the strategy is implemented, and timely appropriate actions are taken to address any deviations. Monitoring will involve regular data collection and analysis on the progress of implementation of the strategy. The results from the analysis will then be used to inform decision-making.

The Strategy will be evaluated in the fifth year and at the end of Strategy ten (10) year period to test its feasibility and likelihood of its ability to produce the desired results. This will be on account of relevance, cost effectiveness, efficiency, and sustainability. In this regard, efficiency will assess the extent to which the intended outputs are attained relative to annually generated targets. Sustainability will address whether there exists capacity at follow-up implementation of the strategy.

### 6.2. Communication

The Fish Marketing Authority in collaboration with the County stakeholders shall prepare annual M & E reports and submit to the Board of Directors, the parent Ministry and Council of Governors to assess the implementation of the strategy. The KFMA will also share the M&E reports with the stakeholders along the fish and fish products value chain for feedback and accountability

### 6.3. Risks and Mitigation Measures

Issues that can affect the implementation of this strategy is as follows:

TYPE OF RISK	LEVEL OF RISK	MITIGATION MEASURES
--------------	---------------	---------------------

Lack of buy in by the stakeholders	Medium	Sensitize all stakeholders on the importance of the Strategy.  • Capacity building of fish trader groups.
Lack of political support	Medium	Sensitize political leaders on the Strategy implementation.
Climate change	Medium	Climate-proofing marketing infrastructure developments through careful siting and appropriate engineering.
Political instability and insecurity	Medium	Peace building programmes.

**6.4. Financing Mechanism**

The Budget outlined in the Implementation Matrix shall be financed by the National Government normal budgetary allocations or national programmes funded by development partners. The County Governments may mobilize resources through mainstreaming of Strategy in the County Integrated Development Plans (CIDPs) or through programmes funded by other players in Fisheries development.

The desired goal in putting resources to the implementation of this Strategy is to create an enabling environment at improving efficiency in fish marketing.

The implementation of the National Fish Marketing Strategy is estimated at 3.2 billion Kshs per year totaling to Kshs. 32,520,727,786 billion over the 10-year strategy implementation period. The National Government, County Governments, private sector investors and fisheries beneficiaries will share the cost and the benefits.





<b>STEPS</b>	<b>INVOLVEMENT</b>
SDBE & F initiates the process in partnership with KFMA	NATIONAL FISH MARKETING STRATEGY DEVELOPMENT COMMITTEE
National Fish Marketing Strategy outlined	
Committee formed to work on the strategy chapters	TECHNICAL WORKING GROUPS
Working groups reports are consolidated	
Stakeholders Mapping	
Stakeholders Consultation	STAKEHOLDERS ENGAGEMENT
ITWG on Policy	
County Consultations	
SWAG-Policies, Standards and Legislations	
Workshop to review and input stakeholder views	
Validation workshop	
Final inputs	
Printing of the strategy	REPORT FORWARDED TO THE PS
National Fish Marketing Strategy	



