



REPORT OF 7th FORUM OF MBOUR



Bunch of sardinella for flour Partial view of the plenary room in a factory

Theme: The production of fishmeal

Challenges for West African Coastal Communities

September 13th 2017 David Boilat centre

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INTRODUCTION

Traditionally, the association for the promoting and involvement of maritime artisanal fishing actors organises every year since 2010, a forum on a set of topical themes on fishing in general and on artisanal fishing in particular.

In most APRAPAM forums, sardinella has occupied a place of choice. This year's seventh forum focusing on "**Fishmeal Production: Challenges for West African Coastal Communities**", reinforces the concerns expressed at the Fifth Forum held in 2015 on the theme: "*Challenges of pelagic resources exploitation and valorisation and their place in food security: the word of professionals*". During the 5th forum in 2015, the role and importance of small pelagic species in food security and jobs in artisanal fisheries were analyzed, as well as the consequences of an irresponsible exploitation and an uncontrolled valuation of pelagic resources on the sustainability of fishing.

Two years after that, the result is an increase in the setting up of factories almost exclusively focusing on the production of fishmeal both in Senegal and in other countries of the sub-region such as Gambia and Mauritania, to which are added informal and craft units engaged in this activity.

The consequence of the uncontrolled proliferation of this activity is reflected in adverse impacts on the resource, on food security and jobs, and on the environment and the residents' public health of these fishmeal production units. The raw material for flour is exclusively composed of sardinella, which is now the main source of animal protein, employment and income for artisanal fishermen and people in the sub-region.

Moreover, this species which constitutes "*a social stability net*" in this geographical area countries, is also a shared resource for which the exploitation

and use modes call for more discernment and precaution, requiring operational and management harmonization measures by States .

At the global level, fishmeal is mainly produced in the western coast countries in South America (Peru, Chile) and in northern Europe (Denmark), which are now joined by Asian countries such as Vietnam and China. Nowadays, this last country is the largest importer in the world, mainly from Peru, but also from the USA, Chile, Mauritania, Ecuador, Russia and Mexico.

Traditionally, we used, on the one hand, species for which there is little demand for direct human consumption (such as anchovy in Peru) and, on the other hand, catches_surplus, fishing discards and processing residues. .

Today, due to an increasing demand in major international markets, offering remunerative prices, fishmeal factories are multiplying, as it is the case in West Africa.

Fishmeal is used for the feeding of animals as well terrestrial (pigs, chickens ...) as marine. The world production ranges from 46% for aquaculture, 24% for pig feed, to 22% for ruminants, domestic animals and pharmaceutical products. Fishmeal accounts for about 68% in the making of aquaculture feed used for aquaculture fish.

I. PROBLEMS OF FISH FLOUR PRODUCTION

The dangers associated with the growing establishment of fishmeal production factories in West Africa include mainly:

1. THE OVEREXPLOITATION OF SARDINELLA

The FAO / CEEAC working group, made up of experts representing the coastal States and those of the countries fishing in the sub region, has been recommending for several years the reduction of the fishing effort on this

resource known as being in a state of overexploitation with the increasing pressure, particularly related to fishing for flour. With the declining in stocks of Peruvian anchovies and North Sea herring, as well as the rush of Asian boats to our sub-region, the dangers are real for small pelagic species.

2. FOOD INSECURITY

For the consumer, scarcity is already being felt through the surge in prices of sardinella on beaches. Indeed, to meet the growing demand, flour mills must turn to fresh fish, especially sardinella, fished by industrial vessels and craftsmen armed for this purpose. Thus, flour production is a potential competitor of consumer markets, weakening the West African poor countries food security.

In this regard, it is worth recalling *"The Malabo Declaration on the accelerated growth and transformation of agriculture in Africa for shared prosperity and better living conditions, adopted by the African Union member countries in 2014"*. This declaration is a commitment by all African countries to force hunger out of the continent by 2025. The proposed actions and commitments seek to put a definitive end to hunger while safeguarding the environment and improving the livelihoods of the most vulnerable.

3. IMPACTS ON EMPLOYMENT



Mbour beach (Senegal): Intensive commercial activities at the landing of the canoes.

The flour sector is developing to the detriment of artisanal fishing jobs, and especially to processors and wholesalers women who supply these small pelagic species for local and regional consumption. The importance of the female component in the distribution and artisanal processing of sardinella is a positive factor for poverty reduction policies.

Information from studies on *"Africa and the Demographic Dividend"* informs us that: *"Between 2000 and 2050, the size of African working-age population is expected to grow from 442 million to 1400 million. To cope with the high population growth, "African countries need to develop sub-sectors of the economy that require a large workforce and allow the creation of better paying jobs so that*



economic growth and poverty reduction take place ": this is the case for the artisanal fisheries sub-sector.

Spilling of harmful products on the beach in Senegal

4. ECOLOGICAL HARMS AND ITS DANGER FOR PUBLIC HEALTH

Flour mills release toxic waste into the sea. On the other hand, the thick smoke released by factories pollutes the air and is a danger to public health. This smoke is the source of much pathology such as allergy, asthma and respiratory diseases, especially for children and for people with chronic diseases. It has also been reported in some countries, particularly in Mauritania, an impressive number of patients living next to factories, suffering from allergies, gastritis, burns of the mouth and esophagitis.

"The curse of the fishmeal industry in Nouadhibou (Mauritania)".

- ✓ *Mohamed Ould Mohamed Cheikh, an environmental activist and president of the organization for the family promoting and the environment defending: ... these factories now represent a major threat to general health (chronic diseases and cases of asphyxiation).*
- ✓ *Mokhtar Ould Amah, ENT doctor and allergist: " ... the environmental pollution in the city of Nouadhibou has caused the spread of many diseases such as allergy, asthma and respiratory diseases, especially in children and people with chronic diseases ".*

II. ORGANIZATION OF THE FORUM

1. EXPECTATIONS OF THE FORUM

It is within this framework that APRAPAM, CAOPA, CONIPAS and REJOPRAO proposed the organization of this forum to think about these different impacts of the fishmeal sector in West Africa.

The forum, through panels that each address a generic sub-theme, aims to examine in more details the impacts of fishmeal manufacturing industries, to see how existing legislation regulates the use of small pelagic species and which

possible changes should be made to ensure that sardinella remains before all, a source of food, income and employment for our people.

The main objective is to widen the reflection on the problem fishmeal making from small pelagic species, to better understand the extend of the phenomenon in the West African sub region, allowing to come up with relevant arguments, means to sensitize the actors and decision-makers of states on its misdeeds and impacts.

One of the expected results of the forum is the wish that the conclusions and recommendations be brought by citizen mobilization through networking to eliminate the problems caused by the exploitation and use of small pelagic species such as sardinella in fish meal production.

The meeting recorded the presence of representatives of civil society and small-scale fisheries of Mauritania, Guinea Bissau, Senegal and Gambia as well as representatives of Senegalese administrations interested in this issue.

2. PREPARATION: INFORMATION GATHERING

For preparing the holding of the forum, two activities were being conducted to collect information on the subject in order to better understand the situation. On the one hand, it was about field surveys to assess the extent of the phenomenon, gather the opinion and perception of different targets (artisanal fisheries professionals, administrations concerned by the subject, industrialists involved in fishmeal production, riparian populations to plant sites and other informal fishmeal production units). On the other hand, it was an electronic consultation launched on the website <http://www.aprapam.org> to widen the participation in the discussion: the latter did not provide important results.

The investigations were conducted by:

- Khady Diop, (sociologist, assistant at CAOPA headquarters), in Saint-Louis (Senegal) and with a group of migrant fishermen returning from Nouadhibou (Mauritania).
- Abdoulaye Fall, (sociologist) in the region of Thiès-Sud in Mbour, Mballing and Joal.
- Ababacar Guèye, (Journalist REJOPRAO) in Dakar region (Thiaroye, Hann, Bargny, Yenne) and the region of Thiès-Nord (Cayar).
- Dawda Foday SAINE, (secretary general of CAOPA) at the Gambia level in Gunjur, Kartong, Sanyang and Brufut.
- Amadou Lamine Guèye, (APRAPAM fisheries economist and technician) in Dakar, in the various institutional and professional structures of fishmeal production.

The supervision was done by Alassane Samba, fisherman, retired from the Oceanographic Research Centre of Dakar-Thiaroye (CRODT). The compilation of survey results is attached to the report.

3 .PROCEEDING OF THE FORUM

3.1 .OPENING CEREMONY

The opening ceremony began at ten o'clock with a speech by Gaoussou Guèye, President of APRAPAM, followed by a presentation of the problem by Alassane Samba.

Gaoussou Guèye addressed the participants on behalf of all the organizers and partners who contributed to the holding of this forum, including CONIPAS, CAOPA and REJOPRAO. He stressed the urgency of thinking about flour production because he says *"Our fish, our sardinellas, go up in smoke and flour; it is a fairly new development in West Africa". Today, due to an increasing*

demand in major international markets, offering high-paying prices, fishmeal factories are multiplying, particularly in West Africa. The quantities of fish processed into flour increase exponentially. Fishmeal is used for the feeding of animals both terrestrial (pigs, chickens ...) and marine "

The dangers associated with the growing establishment of fishmeal production factories in West Africa are of various kinds, including the acceleration of the overexploitation of fishery resources, the increasing of food insecurity, the repercussions on employment, environmental nuisances and its danger for public health.

For all these reasons, he asked participants to look in more details , the impacts of fishmeal manufacturing industries in order to see how existing legislation regulates the use of small pelagic fishes, what possible changes should be made, what recommendations could still be proposed so that sardinella remains above all, a source of food for our populations.

"The requests to be identified will be communicated to the authorities and to all stakeholders: they must be brought forward and defended by citizen mobilization".

He welcomed the presence of representatives of the civil society and artisanal fisheries of Mauritania, The Gambia and Guinea Bissau, and wishes it to be, in this case, materialized by a network of the West African region citizens on the problems set by fishmeal production.

Alassane Samba emphasized the importance of fish in the diet and health of populations, by stating that *"fish is an essential foodstuff in the light of all the elements it brings to the man who already consumes flour in various forms: in Beninese cooking, in the food ration of children suffering from malnutrition in Sierra Leone, in sardinella paste (PINTON in Senegal)"* In addition, he recalled

the results of previous forums on the importance of sardinella for coastal communities and nations and the recommendations that had been made.

This seventh forum is a "*Continuity in action to go further*", in connection with the increased interest in fishmeal, described in the concept note. Four themes will be selected for discussion during panels: overexploitation of sardinella, food insecurity, job losses, environmental nuisances and their dangers for public health;

The discussions will be enriched by the results of the surveys that have already been carried out and by the contributions of facilitators who will be supported by the four interviewers who produced the field reports.

At the end of this presentation, the session is suspended for the coffee break.

3.2. WORKSHOP

3.2.1. PRESENTATION OF SURVEY RESULTS

The resumption of the session began at eleven o'clock with the presentation of the results of the field surveys. The main information collected, annexed to the report, is summarized below:

For the department of Mbour (by Abdoulaye Fall)

Two flour and fish oil factories are present in Mballing (COPELIT and NSAAP) and another in Joal (OMEGA); a fourth Russian factory is about to open in Joal.

The recent proliferation of factories favours overexploitation of sardinella by increasing fishing effort and by the use of prohibited fishing gear. It is also a threat to the jobs of fishing professionals, by competing with local actors. Sardinella has always been the mainstay of people's survival and the factories are serious threats to the contribution of fishing to food security and even to the socio-economic balance of the populations of Mbour, Joal and Mballing.

According to the populations the factories are also sources of nuisance and pollution of the air by the emanations of foul-smelling gases and solid particles. The Mballing people are still convinced that "the factory is the source of the return of leprosy". In addition the waters poured in the sea kill the young species that come to take refuge under the surface.

For Saint Louis (by Khady Diop)

There is only one factory in the area of Saint-Louis called "SEA Production" belonging to Chinese: it is refuelling raw material (mainly sardinella), at the fishing quay of Saint Louis and eventually in Joal. All flour production is sent to China and no finished product is sold in the national market.

The results of the surveys on the effects of fishmeal production are quite mixed. Most of the interviewed stakeholders do not consider the risk of overexploitation of sardinella or any negative effects on food security and jobs. The flour factories in Mauritania have led to an increase in the size and number of round seine units, which should be accompanied by the development of the means of distribution of the caught products. Beyond the personal interests related to the continuation of their activities, the actors in Saint Louis and Nouadhibou denounce the serious nuisance caused by the pollution due to factories on the health of the populations.

For the regions of Dakar and Thiès North: by Ababacar Guèye

For the Dakar region, six flour mills are recorded: AVIMAT in Sébi Ponty, UPAMA in Rufisque, GIE FERMAGRI in Keur Massar, AFRICA FEED in Yene, Senegal Protein and AFRIC Azote in Dakar. There are other artisanal operations such as those at Rufisque BATA. In the northern Thiès region, a plant called BARGNA SENEGAL is planned in Cayar. All these factories stock up fresh fish, mainly sardinella, often with the help of fishermen. The flour is sold to

flour mills abroad (Europe, West Africa) or locally for the production of animal feed, poultry or for aquaculture.

The rapid growth of these factories supplying themselves directly on the beaches by offering higher prices than those of wholesalers has several consequences. In these regions, fishing effort is increasing and pelagic resources are becoming scarce, local stakeholders are losing their jobs and providing fresh or processed fish with difficulty to the poorest populations. The latter who live near factories, complain of smells and fumes released that are sources of respiratory diseases and various infections.

For the Gambia: by Dawda Foday Saine

Fishmeal production is recent in The Gambia and currently involves two units: the Golden Lead Import and Export Transport Company, a Chinese company operating in Gunjur the production of which (flour and oil) is based on ethmalose and sardinella, then a Mauritanian factory installed in Kartong which is not yet active. Two other Chinese developer units are planned to be settled in Sanyang and Brufut. No data could be collected at these factories.

The activity of the factories has many impacts such as the increase of fishing effort resulting in conflicts, the use of prohibited fishing gear leading to the capture of juvenile species, the reduction of the supply of products in markets reducing local activities as well as jobs ,and sea (waste disposal) and air (respiratory diseases) pollution.

For the institutional and professional structures of Dakar city by Amadou Lamine Guèye

Information was collected from two institutions, the Directorate of Fish Products Processing Industries (DITP-MPEM) and the Department of Environment and Classified Establishments (DEEC-MEDD). The DITP is competent to approve of

processing industries in the fisheries sector and to control their products according to established procedures. Currently, there are producing flour only and export outside the EU. The DEEC is in charge of the implementation of the government's environmental policy, especially the protection of nature and men against pollution and nuisances, through the Air Quality Management Centre, the Environmental Emergencies Management Centre and the implementation of a toll-free number 1221. Coastal communities would benefit from being informed about the existence of the toll-free number 1221 and the obligation to carry out an environmental impact study before the approval for the installation of a fish meal factory.

Two professional structures were contacted. Only **Senegal Protein** could be visited: it was founded in 1975 within the Dakar port for the treatment of Senegalese canning waste and surplus catches from fishing vessels. It has suction and repressing seawater pump to eliminate smoke and air pollution. The supply of raw materials has become difficult because of the small quantities of waste generated by the processing units with which the factory has agreements with within the port. The factory is strongly challenged by foreign ones Installed in Senegal, three in total (03) which benefit from the status of free export company and dump huge amounts of products on the local market feed.

The data on AFRIC Azote were collected on its website: AFRIC Azote is a company created in 1967 and specialized in the production of flour and fish oil. Its procurement policy is based on compliance with environmental standards and the renewal of fisheries resources. The factory mainly uses fish waste from fish processing factories. The fishmeal produced has a high content of protein ranging from 62 to 65%. The main species used are tuna, sardinella, mullet, sole ... AFRIC Azote sells fish oil and its activity is mainly focused on exports.

Provender's or manufacturers of poultry, livestock or aquaculture food (NMA, AVISEN, SENEMA, SEDIMA, and GMD) have not been visited. The local feed market is a major consumer of fishmeal. Currently we have no information on the volume of flour used by the provender's. However we can assume the use of large volume of fishmeal, with the development of poultry farming and fish farming.

3.2.2 .ORGANISATION OF PANELS

On the basis of the information contained in the survey reports, two working groups were formed to make up their mind about the four themes of the panels and to provide answers on the following key questions:

- ❖ How and to what extent can flour production based on pelagic small species have an impact on the four themes?
- ❖ What actions can be taken and which recommendations can be proposed to limit or cancel the effects?

Group I, led by Camille Manel, supported by Khady Diop and Ababacar Guèye, discussed the topics on "Resource Impacts and Over-exploitation of Sardinella, Environmental Nuisances and Public Health Hazards";

Group II, led by Khalil Ndiaye supported by Lamine Guèye and Abdoulaye Fall, focused on the "Impact on Food Security and Job Loss".

III.RESULTS OF THE FORUM:

At the resumption in the afternoon, the working groups returned the result of their works in plenary, with Chérif Younouss Ndiaye as general reporter. The following observations and recommendations were identified, enriched by the contributions of the participants.

1. GROUP I:"IMPACTS ON THE RESOURCE ENVIRONMENTAL NUISANCES"

1.1: IMPACTS ON THE FISHERY RESOURCE AND OVEREXPLOITATION OF SARDINELLA:

➤ Findings:

- Rarity of the fish: some canoes are obliged to go far to find fish.
- Lack of scientific data on the destination of landed products.
- The fishing effort on pelagic resources has increased, particularly in Mauritania and Senegal (from 40 to 90 purse seine canoes in Mauritania). This encourages fishermen to target other (juvenile) resources with non-regulatory gear.
- Fishing power has increased with increasing in size of canoes and purse seines.
- Fishermen's collaboration with flour mills by contract and the possession of boats by the latter increases pressure on stocks.
- All flour factories use fresh fish (mainly sardinella) but support making flour with fish waste and other waste.
- The responsibility of the fishermen and the States are involved in the process of scarcity of the resource.
- The only positive impact noticed is the treatment of waste in fish meal or its use in fertilizer and animal feed.

❖ Recommendations:

- ✓ To reduce the powers granted to the administration in the fisheries code (eg Senegalese right of reserve, discretionary power) and open consultations.
- ✓ To study and propose amendments to the regulations governing fisheries in our States (notably in Senegal) to establish transparency in the management of the fishing sector (inventory status, management plans, quotas, etc.) with the effective involvement of professional actors, civil society and local governments.
- ✓ To study the advisability of granting or not approving of the installation of factories.
- ✓ To develop joint actions at sub-regional level to reduce the effects of fish meal production.
- ✓ The need for States to organize the chain and to have data on all facilities producing fishmeal and fish oil.
- ✓ To have reliable data on the breakdown of landed sardinellas between local consumption, exports and use for flour.
- ✓ To control and regulate fishing effort.
- ✓ To enforce fishing and processing regulations.
- ✓ To reduce the size of purse seine units and modulating their activities according to demand.
- ✓ To propose to governments to tax the flour production activity to discourage it.
- ✓ To improve the process conditions for granting approvals to the investment code.
- ✓ To harmonize regulatory texts for resource management in the sub-regional area for greater transparency, in line with the

"FAO Guidelines for Sustainable Small-Scale Fisheries in a Context of Food Security and Poverty Alleviation".

1.2 ENVIRONMENTAL HARMS AND ITS DANGERS FOR PUBLIC HEALTH:

➤ Findings:

- Lack of awareness of the DEEC' activities, including the toll-free number (1121) for free calls in case of pollution and nuisance.
- Lack of quantified data on flour production and nuisance assessment.
- Environmental and social impact obligatory studies for the approval of a factory, but the procedures are not respected.
- Highly polluting factories are located in residential areas.
- There is no environmental follow-up after installation of the factory or rectification by upgrading.
- Only one factory (Sen Protein) among those mentioned has a device for the elimination of smoke and fumes.

❖ Recommendations:

- ✓ To require transparency in the process of granting sites for the installation of factories.
- ✓ To raise the awareness of grassroots stakeholders (local elected representatives, fishing professionals) on the missions of the environment services.
- ✓ To take measures to mitigate environmental nuisances and public health impacts, in particular the establishment of factories far from

residential areas and the establishment of a device to eliminate smoke.

- ✓ To produce and disseminate environmental monitoring bulletins for better information to local populations and communities.
- ✓ To put in place the regulation of the flour production activity at the sub-regional level.
- ✓ To strengthen the role of civil society in this issue and for the application of regulatory measures.
- ✓ To make environmental monitoring more effective as well as the upgrading of production units and sites

Group 1: Follow-up actions

- ✓ To have reliable scientific information on the state of the resource, the effects and impacts of fishmeal production to better sensitize administrations and factories;
- ✓ To encourage the State to carry out an effective control and follow-up of the companies activity in accordance with the approval file (upgraded) and define its orientation in this sector;
- ✓ To improve survey data on fishmeal production activity (factories and processing plants, quantities produced, exported);
- ✓ A need to hold audience with the administration to know the position of the State;
- ✓ To make advocacy on the fishmeal factory through CAOPA to sub regional institutions;
- ✓ To develop jointed actions at the sub-regional level to reduce the effects of fishmeal production by raising the awareness of all stakeholders to help States to better manage the resource.

2 Group II: Impacts on food security and job losses

2.1 Impacts on food security

➤ Findings:

- No control of statistical data on the distribution of production according to uses, consumption, levels of food insecurity in the sector.
- Exports of fresh, frozen and processed pelagic products have a negative impact on countries food security.
- The collaboration between fishermen and factories through contracts, as well as the arming of boats by factories, reduce the fish supply to consumers.

❖ Recommendations:

- ✓ To mobilize all stakeholders in this problem of fishmeal production
- ✓ To carry out advocacy at the sub-regional level and encourage states to develop specifications that focus on fish processing plants other than flour manufacturing.
- ✓ To conduct studies to better identify and measure statistical data, the actual impact of fishmeal production, the quantities consumed locally and those exported as well as the fishing effort on small pelagic.
- ✓ To strengthen distribution channels for sardinella for human consumption and study the possibilities of using other inputs for flour.

2.2 Impacts on jobs:

➤ Findings:

- No mastery of employment data in the artisanal sub-sector.

- Reduced availability and accessibility of fish to wholesalers and processors women reduced to unemployment.
- The jobs in the sector are reduced in the sites with flour factories, especially the related professions: carters, porters ...
- The jobs created by factories are precarious and limited.
- The activities of processors women are reduced to the maximum (example: the women of Kayar (Senegal) are now working on three months against nine before the establishment of factories.

❖ **Recommendations:**

- ✓ To study the various trades affected by the flour industry to obtain reliable data on jobs and trends.
- ✓ To highly involve people in the social aspect of impact studies.

Group 2: Follow-up actions

- ✓ To broaden the debate on the export of pelagic which has a strong impact on food security?
- ✓ To continue studies on the general problem of fishmeal production to better understand the extent of the phenomenon;
- ✓ To create monitoring and control commissions on the establishment of fishmeal production plants with a view to enforcing regulations, proposing concrete actions to the authorities and appropriate directions to be taken;
- ✓ To promote strong collaboration between professionals and civil society to defend their interests;
- ✓ To produce a population information magazine on the subject in collaboration with journalists (REJOPRAO) and other media organizations.

IV. CLOSURE OF THE FORUM

The closing ceremony was chaired at 5 pm by Mrs. Adama Antonia Djalo Vice-President of CAOPA.

In her address, she first thanked on behalf of CAOPA and on its own, delegations from Mauritania, The Gambia and Guinea-Bissau.

She also thanked the officials who agreed to respond to the invitation and the "brilliant panellists", the investigators and all those who made contributions that she found all very rewarding. The debates were very instructive because she did not know much about the challenges of setting up fishmeal factories for the simple reason that it is a phenomenon that does not yet exist in her country, Guinea-Bissau.

She hopes that the warning message has passed for all the participants and that it is now necessary to spread the message on a larger scale: for countries that do not yet know the phenomenon of fish meal factories, she recommends them to be especially vigilant. In this respect, she invites all actors to take part in the citizen fight.

She underlines that *"CAOPA will always be there to coach you and accompany you."* To this end, CAOPA is engaged in global advocacy for the establishment of an International Year of Artisanal Fisheries. So I beg each of you to pass on this plea to your respective governments. "

With that, she wished everyone a safe journey back to their respective families.