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‘What is the value of the constitution?’

Value chains, livelihoods and food security
in SA’s large- and small-scale fisheries

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PLAAS Working Paper 42: 'What is the value of the constitution?': Value chains, livelihoods and food security in South Africa's large- and small-scale fisheries

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ABSTRACT

This paper seeks to assess the state of knowledge in relation to the interrelated subjects of value chains, livelihoods, food systems, and regulatory dynamics in South Africa's large- and small-scale fisheries. South Africa's marine fisheries play an important role in sustaining the livelihoods and food security of poorer coastal communities. However, the post-apartheid fisheries dispensation is marked by structural inequalities between large- and small-scale fisheries sectors, with direct implications for livelihoods and food security. Addressing these inequalities in practice requires a critical understanding of South Africa's fisheries economy and governance system, and in particular, the way that benefits from the country's marine commons are distributed within society. As a means to assess the state of knowledge regarding these subjects, the paper reviews key literature that engages with small- and large-scale fisheries value chains, and the livelihoods and food systems they sustain. Literature on fisheries governance is also reviewed to assess how fisheries value chains are shaped by the regulatory environment. Having reviewed what is known in the literature about South Africa's fisheries economy and governance system, the paper briefly considers the implications of this knowledge for small-scale fisheries value chains, and for the local livelihoods and food systems of poorer coastal communities who depend on small-scale fisheries. The paper also identifies important knowledge gaps and future research objectives in relation to the economics and power dynamics of fisheries value chains. Finally, the paper discusses key themes emerging from the literature that help to shed light on the current process in South Africa's fisheries.

Keywords: fisheries, value chains, livelihoods, food governance, South Africa

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ACRONYMS

BEE	Black Economic Empowerment
DAFF	Department of Agriculture, Forestry and Fisheries
DEAT	Department of Environmental Affairs and Tourism
FAO	Food and Agriculture Organization
GDP	Gross Domestic Product
LRC	Legal Resources Centre
MDT	Masifundise Development Trust
MLRA	Marine Living Resources Act
MSC	Marine Stewardship Council
NDP	National Development Plan
NPC	National Planning Commission
NEDLAC	National and Economic Development and Labour Council
SFTG	Subsistence Fishers Task Group
SSF Policy	Policy for the Small-Scale Fishing Sector in South Africa
TAC	Total Allowable Catch
WCRL	west coast rock lobster

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1. INTRODUCTION

South Africa's fisheries make a crucial contribution to the sustenance and incomes of poorer communities along the country's coastline. This paper therefore seeks to ascertain the state of knowledge regarding livelihoods, food security, and value chains in South Africa's fisheries, and the ways that coastal fishing communities are *both marginalised by, and adversely incorporated within* the structures of the broader fisheries economy and governance system. Literature on South Africa's fisheries is reviewed, with a particular focus on the academic literature that engages with the economic, political and social dynamics of large- and small-scale fisheries. The paper presents the key findings emerging from the literature, and considers their implications for the food systems, livelihoods and economies of poorer coastal communities. It also identifies knowledge gaps and future research priorities, and reflects upon the kinds of regulatory intervention that might enable disempowered coastal communities to have equitable access to the marine commons, and equitable participation in the commercial fishing industry. The paper presents a broad synopsis of the literature, and, given the complexity of the issues, does not claim to be exhaustive.

Before proceeding, it is appropriate to define some key terms used in the paper. The term *livelihood* is defined here as: a set of practices, knowledge, resources, and relationships through which people make a living. *Food security* is defined as people's ability to access the daily calories and nutrition required for a healthy and dignified life, as well as the multiple-scale systems of food production, trade, marketing, regulation, and associated power relations that determine how food is distributed, accessed and consumed. For the purposes of this paper, the term *informal* refers to a mode of economic activity that is: (1) largely unregulated by statutory policy, legislation, management, and written contract; (2) loosely organised and de-centralised in its systems of operation; (3) based on low levels of capital and technology; and (4) which relies more heavily on 'non-market' values and practices of reciprocity and co-operation than is the case in other modes of economic activity. In contrast, the term *formal* denotes a kind of economic activity that is: (1) regulated by statutory policy, legislation and management; (2) highly organised and centralised in its systems of operation; (3) capital and technology-intensive; and (4) driven by the pursuit of profit maximisation through competitive practices. It should be emphasised that 'formal' and 'informal' economic activity overlaps and intersects in important ways.

2. MAIN LITERATURE REVIEW

Overview of large-scale fisheries in South Africa

The literature on South Africa's fisheries reflects international trends, with an overwhelming focus on large-scale or 'industrial' fisheries, rather than on small-scale fisheries (van Sittert 2002; Hauck 2008). Though not reviewed in this paper, the literature from the natural sciences predominates, with a vast and internationally respected body of work providing a thorough understanding of fisheries biology for key species targeted by the country's industrial fisheries sectors.¹ The social science literature concerning South Africa's industrial fisheries is far smaller, but has established a critical understanding of the fundamental structure and dynamics of the fisheries political-economy in post-apartheid South Africa. Though focused primarily on large-scale fisheries, this latter body of literature reveals vital insights into the wider fisheries system in which small-scale fisheries are embedded. Some of the most important texts in this literature include van Sittert (2002), Mather et al. (2003), Sauer et al. (2003), Crosoer et al. (2006), Hara and Nielson (2006), van Sittert et al. (2006), and Ponte & van Sittert (2007).

¹ See reference list for a selection of key texts.

Drawing on the work of these and other scholars, South Africa’s large-scale or ‘industrial’ fisheries can be sketched as follows. To begin with, these fisheries are marginal in relation to the national economy, contributing about 0.1% to the Gross Domestic Product (GDP) (Hara&Nielson 2006; Crosoer et al. 2006). Nevertheless, despite this marginal position in the wider economy, South Africa’s industrial fisheries make an important economic contribution in the coastal areas where they operate, in particular because these areas are often characterised by widespread poverty, and a lack of employment opportunities (Hersoug&Isaacs 2001; Hara&Nielson 2006; Schultz 2010).

There are 22 commercial fishing sectors in South Africa, each defined according to target species and fishing method. Most of the commercial sectors are based on industrial modes of harvesting and post-harvest processing that are highly formalised, and dominated by a few large companies, including the Oceana Group, I&J, Sea Harvest, and Lusitania (van Sittert 2002, Branch&Clark 2006). The core of South Africa’s industrial fisheries is made up of the hake, small pelagic, and west coast rock lobster sectors, which operate mainly along the west and south-west coasts (Branch&Clarke 2006; van Sittert et al. 2006). Other economically important (though relatively smaller) commercial sectors target species such as squid, tuna, south coast rock lobster, and abalone.

Large-scale fishing sectors utilise capital and technology-intensive modes of harvesting, with fleets of high-powered steel-hulled vessels averaging between 15m and 50m in length, equipped with sophisticated navigation and fish finding equipment, and highly mechanised fishing gear. Large-scale fishing vessels catch the bulk of fisheries resources harvested annually in South Africa (Hara&Nielson 2006; van Sittert et al. 2006).² In the case of the small pelagic sectors, trawlers use purse-seine nets to harvest tons of anchovy (*Engraulis encrasicolus*) and pilchard (*Sardinops sagax*) (Sauer et al. 2003). Shallow-water hake (*Merluccius capensis*) and deep-water hake (*M. paradoxus*) are targeted on an industrial scale by trawlers, and by ‘longline’ vessels rigged with fishing lines that are kilometres in length, and baited with thousands of hooks (Sauer et al. 2003). West coast rock lobster (WCRL) (*Jasus lalandii*) is harvested on an industrial scale by the ‘offshore WCRL’ sector, using large wooden and fibreglass vessels, and mechanically-deployed steel cages (‘traps’) to harvest tons of WCRL in waters roughly 100m and further from the shoreline (Mather et al. 2003; Schultz 2015).

Overview of small-scale fisheries in South Africa

While the literature on South Africa’s fisheries is largely focused on the large-scale sectors, small-scale fisheries have received increasing attention over the last two decades from scholars working in a number of social science disciplines. These scholars have developed a clear understanding of the social dimension of small-scale fisheries, including such issues as fishing practices, culturally-grounded ecological knowledge, socio-economic conditions, and regulatory challenges associated with small-scale fishing. Some of the key academic texts in this literature include Hauck and Sowman (2003), Cardoso et al. (2006), Raemaekers (2009), Sowman and Cardoso (2010), Sunde (2014), Hauck (2009), and Isaacs (2006; 2012).

While South Africa’s small-scale fisheries are extremely diverse in terms of the people, practices and species involved, the literature identifies some key features that are common among the various small-scale fisheries along the country’s coastline. These small-scale fisheries are practiced by people in economically and politically disempowered rural and urban coastal communities, who have low levels of capital and technology, and high levels of culturally-embedded knowledge and skill to target small amounts of locally-occurring species for subsistence or sale.³

² The term ‘fisheries resources’ is used advisedly; the contemporary use of the term ‘resources’ can be seen as reflecting the material and symbolic commodification of nature by contemporary society.

³ ‘Economically disempowered’ refers here to poverty, lack of access to formal fishing rights, and little or no ownership and control in the commercial fishing industry. ‘Politically disempowered’ denotes a lack of participation in, or influence over governance processes.

In the literature, there is a strong geographic focus on the Western Cape coastline, where small-scale fisheries are more commercialised than in the Eastern Cape and KwaZulu-Natal. In the Western Cape, fisheries activities are mainly boat-based. The traditional wooden 'bakkie' is commonly-used vessel, which has been used for several centuries. Bakkies are 5m–7m long, and are propelled by single outboard engines of about 10hp⁴–15hp (though oars are still used in places like Elands Bay) (Schultz 2010). Bakkies target various 'linefish' such as snoek (*Thyrsites atun*), yellow tail (*Seriola lalandi*), and cape bream (*Pachymetopon blochii*) using hand-held fishing lines (Schultz 2015). These vessels also harvest WCRL with steel-hooped nets deployed by hand. The open-decked, fibreglass-hulled 'skiboat' is another vessel used in small-scale fishing activities, and it is mainly used in the line fishery. Skiboats that are 10m–15m long, and are propelled by two powerful inboard motors ranging from about 70hp–90hp (Schultz 2010). Apart from boat-based fishing, residents of coastal communities in the Western and Northern Cape also practice shore-based activities such as intertidal shellfish harvesting (Sowman&Cardoso 2010, Schultz 2010). Intertidal species are usually harvested for subsistence purposes (although there is also limited commercial sale), with small amounts of black mussel (*Mytilus galloprovincialis*) and limpet (*Patella spp.*) caught by hand using improvised metal implements (Schultz 2015).

Small-scale fisheries in the Eastern Cape and KwaZulu-Natal have received less attention in the literature, with Raemaekers (2009), Mbata (2011) and Sunde (2014) being notable exceptions. These authors have done extensive social research in mostly isolated rural fishing communities. Small-scale fisheries in the Eastern Cape and KwaZulu-Natal are mainly shore-based, with a strong focus on inter-tidal harvesting activities. Local residents use improvised hand-held metal implements to harvest inter-tidal species such as octopus, limpets, and black and brown mussels along rocky shorelines at low tide (Raemaekers 2009). Apart from inter-tidal harvesting, angling with rod and line is also an important small-scale fishing practice in the Eastern Cape and KwaZulu-Natal. Anglers operate along rocky shorelines, beaches, and estuaries, and target a wide variety of inshore fish species (Raemaekers 2009; Mbata 2011; Sunde 2014). Less common small-scale fisheries activities include abalone diving in the Eastern Cape, and in northern KwaZulu-Natal, Kosi Bay communities employ the centuries-old method of catching fish in wooden traps (Mbata 2011).

Fisheries governance: Policy, legislation, and management regulations

Governance (or societal regulation) is fundamental to livelihoods, food systems, and value chains in South Africa's fisheries, ordering the relation between fisheries resource users and the marine commons by establishing and enforcing boundaries of permitted action. In practical terms, the system of fisheries governance regulates critical issues such as: access to fisheries resources (i.e. who has a right to harvest, and who does not); the type and amount of species that may be harvested; when and where these species may be harvested; the methods that may be used; and the post-harvest processing and sale that can be undertaken.

The social science literature on South Africa's fisheries has focused considerable attention on governance in the post-apartheid period (Hersoug&Isaacs 2001; Hauck&Sowman 2003; van Sittert 2002; Hara&Nielsen 2006; van Sittert et al. 2006; Witbooi 2006; Isaacs et al. 2007; Ponte&van Sittert 2007; Raemaekers 2009; Mbata 2011; Sunde 2014; Schultz 2015). A central theme in this literature is the tension between change and continuity associated with the post-apartheid democratisation of the fisheries governance system, which is a complex (and conflicted) web of policies, legislation, institutions, rules and practices meant to govern multiple different groups who compete to access fisheries resources. The statutory or *de jure* system of fisheries governance in South Africa is based on the Constitution (RSA 1996), which vests power over the marine commons in the national government, whose role is to act as 'custodian' on behalf of the country's citizens (Witbooi 2006). This role is principally played by the Department of Agriculture,

⁴ Horse power.

Forestry and Fisheries (DAFF), which is responsible for developing and implementing national policy, monitoring fishing activities, enforcing regulatory compliance, licensing, and conducting scientific research. DAFF grants access to the marine commons by allocating fishing rights (permits and quotas). The number of fishing rights that DAFF allocates, as well as the amount of resources that right holders are allowed to harvest is formally determined on the basis of scientific research. A range of state conservation agencies also support DAFF, fisheries at provincial and local level.

DAFF, and supporting management agencies, operate under a range of post-apartheid legislation intended to facilitate democratic governance of the environment, as envisioned in the Constitution. The principal law governing coastal and marine fisheries is the Marine Living Resources Act (MLRA) (Act No. 18 of 1998) (Hersoug&Isaacs 2001; van Sittert et al. 2006; Witbooi 2006). Developed under the authority of the Department of Environmental Affairs and Tourism (DEAT) (the fisheries management agency at the time), the MLRA obliges management agencies to ‘exercise ... control over marine living resources in a fair and equitable manner to the benefit of all the citizens of South Africa’ (DEAT 1998: 3). The MLRA also prioritises ‘broad and accountable participation in the decision-making processes’, and ‘the need to restructure the fishing industry to address historical imbalances and to achieve equity within all branches of the fishing industry’ (DEAT 1998: 15).

Under the MLRA, a range of reforms have been implemented, which aim to empower historically disempowered fishing communities. People in these communities have received a greater share of commercial fishing rights and company shares, and have enjoyed greater participation in governance and management processes than was the case before 1994 (van Sittert et al. 2006; Isaacs et al. 2007; Ponte&van Sittert 2007; Sowman et al. 2014). However, there is also broad agreement in the literature that the first wave of post-apartheid fisheries governance reform (1994–2007) did not significantly change the status quo (Hersoug&Isaacs 2001; van Sittert 2002; Crosoer et al. 2006; Ponte&van Sittert 2007; Isaacs et al. 2007; Sowman et al. 2014; Sunde 2014). In crude summary, the reforms upheld the dominance of established large-scale fishing companies (now in partnership with BEE groupings linked to the ruling political party): these companies continue to exercise significant influence over governance decision-making processes, and they continue to receive a disproportionate share of the fishing rights allocated for commercially-valuable species. Therefore, small-scale fishing communities have generally been unable to decisively influence the nature and outcomes of governance processes (Schultz 2010; 2015), while most active small-scale fishers have not secured fishing rights, despite their economic and cultural reliance on harvesting fisheries resources (Hersoug&Isaacs 2001; Raemaekers 2009; Sowman 2006; Sowman et al. 2014; Schultz 2015).

This state of affairs fuelled a sense of disempowerment among many small-scale fishers. As one fisher put it: ‘What is the value of the Constitution ... when they exclude the poor fishermen from their resources? Now is the time, since the democratically elected system, the wheel should turn ...’ (Schultz 2015: 214). The lack of substantial change in the fisheries governance system led to the formation of a social movement of small-scale fishing communities based mainly in the Western Cape, who began to politically organise to fight for their Constitutional right to have equitable access to the marine commons, and full participate in fisheries governance processes (Isaacs et al. 2007; Sowman et al. 2014). In 2004, with the support of the Masifundise Development Trust (MDT), the Legal Resources Centre (LRC), and academic researchers, a group of small-scale fishers launched a class action case in the Western Cape Equality Court (Sowman et al. 2014). The court finally ruled in favour of the applicants in May 2007 – a historic legal victory that led to a second wave of fisheries policy and legislative reform in South Africa (Isaacs et al. 2007; Sowman et al. 2014). First and foremost, the court ordered the Minister of DEAT (the national fisheries oversight department at the time) to develop a policy specifically for previously excluded small-scale fishing communities, and to ensure that these communities were given ‘interim relief’ to address their immediate material needs until the policy was in place.

Interim relief was subsequently instituted from 2008 in the Western Cape and Northern Cape, taking the form of exemption permits, allocated annually to 1 000–1 500 individuals on the basis of their verification as ‘bona fide’ small-scale fishers (Sowman et al. 2014).⁵ However, interim relief had serious limitations, such as excluding a large segment of South Africa’s coastal small-scale fishing population due to a few permits allocated in only two provinces (Sowman et al. 2014). While interim relief was being implemented at community level, the fisheries department embarked on a process of developing a national policy for small-scale fisheries. After five years of intensive public participation, National and Economic Development and Labour Council (NEDLAC) negotiations, and parliamentary reviews (Sowman et al. 2014), the Policy for the Small-Scale Fishing Sector in South Africa (SSF Policy) was finally gazetted in June 2012, under the authority of DAFF (DAFF 2012). The promulgation of this policy was a significant moment in the governance of South Africa’s fisheries (Sowman et al. 2014). The policy legally recognised small-scale fishing communities’ rights to access the marine commons, and also proposed a “paradigm shift” in the state’s approach to small-scale fisheries governance (DAFF 2012: 17). As stated in the policy introduction, the policy ‘aims to provide redress and recognition to the rights of small-scale fisher communities in South Africa ... to fulfil the constitutional promise of substantive equality’ (DAFF 2012: 1).⁶

At the time of writing, the SSF Policy is intended for implementation in 2016. While the policy has not yet been implemented, it converges with the five-year expiration of medium and ten-year longterm commercial fishing rights, including those for economically-valuable species (such as WCRL) which are targeted by large- and small-scale fishers (Sowman et al. 2014). Since the SSF Policy co-incides with the expiration of commercial fishing rights, DAFF has a political and administrative opportunity to re-distribute some commercial fishing rights from the large- to small-scale fishers. To this end, the MLRA was amended in 2014, to make provision for re-distributing fishing rights in accordance with the SSF policy (DAFF 2014).

While the political stage has thus been set to rapidly shift small-scale fisheries governance, the democratising potential of this second wave of post-apartheid fisheries reform – like the first – must be viewed in the wider macro-economic policy context in which fisheries governance is embedded. Arguably, the post-apartheid state’s pursuit of a locally-specific variant of neoliberal macro-economic policy severely constrains its scope for radically intervening in the fisheries economy through fisheries policy, legislative and management reform. Thus, both waves of fisheries reform reinforced the power of established fishing companies over the fisheries value chain at the expense of poorer coastal fishing communities (van Sittert 2002; Crosoer et al. 2006; Ponte&van Sittert 2007; Sowman et al. 2014; Schultz 2015).⁷ The first wave of fisheries reform by embracing ‘neo-liberalism in domestic economic policy, which severely circumscribed forms of state intervention and emphasised competition in the global market’ (Crosoer et al. 2006: 7) neutralised threats to nationalise or radically redistribute fishing industry rights.

The post-apartheid government’s pursuit of neoliberal macroeconomic policy is implied by the National Development Plan (NDP) (NPC 2011). Despite many contradictions, the NDP’s economic approach favours established large-scale fishing companies (Sowman et al. 2014; Schultz 2015), by prioritising capital- and technology-intensive forms of natural resource harvesting and production, emphasising ‘exports and competitiveness’ (NPC 2011: 93), and implementing ‘measures to reduce business costs and ... enhance profitability’ (NPC 2011: 106). Crucially, the NDP (NPC 2011: 209)

⁵ ‘Bona fide fisher’ is defined by the Equality Court order as those whose livelihoods depended entirely on the small-scale harvesting of fisheries species, and who had been excluded from previous fishing rights allocation processes.

⁶ ‘Small-scale fishers’ are defined in the policy as those ‘that fish to meet basic livelihood needs or are directly involved in harvesting/processing or marketing of fish, traditionally operate on/near the fishing grounds, predominantly employ traditional low technology or passive fishing gear, usually undertake single day fishing trips and are engaged in the sale or barter or involved in commercial activity (sic)’ (DAFF 2012: 6).

⁷ Strictly speaking, neoliberal macro-economic policy was already in force in South Africa before 1994. As (Bond 2005: 36) observes, the apartheid government in the late 1980s had already begun to adopt neoliberalism ‘as the basis for economic policy-making’.

argues that small-scale fisheries do not ‘boost employment. Industrial capital-intensive fisheries offer better salaries and better conditions of employment, and are more transformed than small-scale low-capital fisheries’. The NDP therefore proposes limits on the state’s scope to enact reforms under the SSF Policy (Sowman et al. 2014; Schultz 2015). Small- and large-scale fisheries value chains, livelihoods and food systems must thus be situated in this macroeconomic policy context.

Fisheries value chains and associated livelihoods and food systems

A consideration of value chains is critical for addressing the question of ‘who benefits’ from fisheries resources. In South Africa, fisheries value chains are largely unstudied as an explicit research focus. Existing knowledge is mostly inferred from the literature on the governance and political-economy of large-scale fisheries (see van Sittert 1993; van Sittert 2002; Mather et al. 2003; Sauer et al. 2003; Crosoer et al. 2006; Hara&Nielsen 2006; Ponte&van Sittert 2007, Hara&Raakjaer 2009), and the literature on small-scale fisheries governance and livelihoods (see Isaacs et al. 2007; Sowman 2006; Raemaekers 2009; Mbata 2011; Sunde 2014). Though not focused on value chains specifically, these two bodies of literature shed light on critical aspects of value chain organisation, ownership, control and benefit distribution, as well as the regulatory system governing value chains. More recently, social researchers working in the small-scale fisheries field (and based mainly in the Western Cape) have given growing attention to value chains, not only as a subject of study, but also as a conceptual and methodological approach to understanding small-scale fishing livelihoods, economies, and food systems (Isaacs 2013; Hara 2014; Raemaekers et al. 2010; Wentink 2014).

Value chains in large-scale fisheries

In the context of large-scale fisheries value chains, fisheries resources pass through a complex sequence of stages on their way from ‘sea to plate’. The relevant literature indicates that large-scale fisheries value chains are dominated by a few established companies whose factories use high levels of capital, technology and petro-chemical energy to transform raw fisheries resources into value-added products for market. Extensive transport systems service these factories, which are equipped with sophisticated cool-storage, freezing, processing and packaging facilities. After processing, fisheries products move along the value chain to the trading and marketing stages, which, as with the processing stage, are dominated by the same few companies, as well as by large food retail companies.

In the case of pelagic catches such as anchovy and pilchards, processing centres on canning, with finished products sold wholesale to large food retail companies targeting the low-income South African and international markets (Hara&Raakjaer 2009). Canned pelagic fish play a crucial role in supporting food security in poorer communities, providing a fairly affordable source of vital nutrients such as protein and omega oils (Sowman&Cardoso 2010). Much of the anchovy catch is also reduced into fishmeal, which is sold to the national and international agricultural industry for use as animal feed (van Sittert 1998; Hara& Raakjaer 2009; Schultz 2010). Hake is cleaned and packaged as fillets, and processed into a range of frozen fish products that are sold to local restaurants and food retailers, or exported to international markets (Crosoer et al. 2006). The post-harvest processing of WCRL involves packaging live and frozen lobster, and canning lobster tails. WCRL is sold live and frozen to South Africa’s upper-income hospitality industry, with most live, frozen and canned WCRL being exported to lucrative middle- and upper-income markets in China, Malaysia, and other East Asian countries (EEU 2010).

Large-scale fisheries value chains play an important role in generating livelihoods for residents of poorer coastal communities. Though precise data is not available, about 30 000 direct and indirect livelihoods derive from large-scale fisheries (Mather et al. 2003). However, the figure is slightly misleading, because it includes commercial fishing sectors that could more accurately be called small-scale. According to figures provided by some of the largest industrial fisheries companies they provide direct employment as shown in *Table 1*:

Table 1: Employment provided by South African industrial fishing companies

Company	Direct employment	Indirect employment
I&J	1 600 people	
Sea Harvest	±4 000 people	±5 000 people
Oceana	4 399	1 654 people

Source: I&J (undated); Oceana Group (undated); Sea Harvest (undated).

There is no comprehensive data on the capital to labour ratio, but as large-scale fishery operations are highly mechanised, it can safely be assumed that the cost of creating each job is much higher than for small-scale fisheries. Large-scale fisheries' value chains generate essentially 'formal' livelihoods. The main forms of direct employment include working on vessels as crewmembers and support staff (e.g. engineers and cooks), or in the factories, where workers clean, sort, process and pack fish, and perform mechanical maintenance and repair. Most of the large-scale industry's labour force are residents of poorer coastal communities (Sauer et al. 2003), who are employed through formal contracts, mostly on a seasonal basis. Factory workers and vessel crewmembers in large-scale fisheries earn higher incomes than those earned by small-sale fishers: in 2001–2002, Mather et al. (2003) found that the average income in South Africa's commercial fisheries (which are mainly large-scale) was R35 000 per year. In a context of widespread poverty and unemployment, factory workers and vessel crewmembers working in large-scale fisheries are often relatively better off than other residents in the coastal areas where these fisheries operate (Sowman et al. 2011). People employed in large-scale fisheries are thus able to make a crucial contribution to their household's income (Hauck 2009; Witte 2010; Schultz 2010).

The same few companies own and control most phases of the value chain in large-scale fisheries, from harvesting through to processing. The state allocates these established companies most of the commercial fishing rights, and they own most of the key assets and infrastructure involved in the value chain, including vessels, cooling and freezing facilities, and processing plants (Hersoug&Isaacs 2001; van Sittert 2002; Crosoer et al. 2006). At the same time, these companies also enter joint ventures with smaller Black Economic Empowerment (BEE) companies that have fishing rights but which lack the necessary assets and infrastructure (Sauer et al. 2003). Established companies usually enter into joint ventures on favourable terms, effectively increasing their already privileged access to fisheries resources, and extending their control of the value chain (Crosoer et al. 2006; Ponte&van Sittert 2007). Though shareholdings in the established large-scale fishing companies have racially transformed under the BEE programme, the pattern of ownership, control and benefit distribution in large-scale fisheries value chains continues to favour political and economic elites (Ponte&van Sittert 2007). Coastal communities that were disempowered during apartheid continue to be disempowered through their exclusion from, or adverse inclusion in, large-scale fisheries value chains. Instead of having an equitable degree of ownership and control, their involvement is still limited to the providing low- and medium-skilled labour, and the owning a few company shares. Ultimately, coastal communities bear all the physical hardship and risks involved in the value chain, while only realising a small percentage of the final market price, and most economic benefit is distributed to other actors who own and control the post-harvest and marketing phases of the value chain.

The dominance of established fishing companies (and their elite shareholders) in large-scale fisheries value chains is sustained by the regulatory environment (van Sittert 2002; Isaacs et al. 2007; Sowman et al. 2014; Schultz 2015). Apart from the macro-economic policy dynamics discussed earlier, the structures and processes of fisheries governance most directly sustain the power of established fishing companies in relation to other actors in the value chain. Through rights allocation, DAFF decisively empowers these companies. As indicated earlier, DAFF has consistently granted most of the Total Allowable Catch (TAC) for commercially valuable species to established fishing companies through successive rights allocation processes, effectively locking small-scale fishing communities out of the most profitable value chains (Hersoug&Isaacs 2001; van Sittert 2002; Crosoer et al. 2006; Ponte&van Sittert 2007).

Value chains in small-scale fisheries

South Africa’s small-scale fisheries’ value chains are largely not explored in the literature. Until recently, knowledge of small-scale fisheries value chains was mostly drawn from literature detailing the socio-economic conditions, livelihoods, harvesting, and post-harvest processes associated with small-scale fisheries. However, Isaacs (2013), Hara (2014) and Wentink (2014) have begun to devote growing attention to small-scale fisheries value chains.

Value chains in South Africa’s small-scale fisheries are quantitatively and qualitatively different from those found in the large-scale fisheries context. Though geographically diverse, small-scale fisheries value chains in South Africa are defined by informal, localised economic operations and relationships, and minimal post-harvest processing utilising low levels of capital and technology. The organisational structure of small-scale fisheries value chains is much simpler than for large-scale fisheries, with relatively few links in the chain from harvest to consumption. Furthermore, the type and quantity of species involved are usually of a far lower economic value than is the case in large-scale fisheries (Isaacs et al. 2007; Sunde&Raemaekers 2010; Raemaekers 2009; Sowman 2006; Sowman et al. 2011; Wentink 2014).

Small-scale fisheries value chains support livelihoods characterised by interweaving economic endeavour with local culture and identity, and by a fluid continuum between activities oriented towards subsistence and commerce (Sunde&Raemaekers 2010; Isaacs et al. 2007; Sowman et al. 2011). More people are estimated to be deriving a livelihood from small-scale fisheries than large-scale fisheries (Sunde&Raemaekers 2010). Until recently, the most widely cited figure was 30 000 people, based on the Subsistence Fishers Task Group (SFTG) Report (Russell et al. 2000). Though the precise number is still not known (due to the DAFF’s preoccupation with large-scale fisheries), the current and most accurate estimate is that at least 100 000 people participate in small-scale fisheries as their main or supplementary source of livelihood (Raemaekers et al. 2010). In many poorer coastal areas a growing number of people are ‘turning to the sea’ to obtain money and food (van Zyl 2009; Schultz 2010; Mbata 2011; Sunde 2014; Schultz 2015).

The average incomes earned in small-scale fisheries are low compared to large-scale fishing, though no comprehensive data exists (Sowman et al. 2014). Research indicates that incomes vary greatly according geographic region, sea conditions, target species abundance and seasonal availability, and the kind of participation in harvest and post-harvest work activities (Sowman&Cardoso 2010). Fishing rights allocation (quotas and permits) is the main determinant of income levels. Broadly speaking, those who have been allocated commercial fishing rights earn higher incomes than those who have not. In 2012, Schultz (2015) found that in the Western Cape, some of the highest incomes were earned by ‘nearshore’ WCRL quota holders, averaging R60 000–R80 000, while interim relief permit holders earned as little as R15 000 a year (Schultz 2015).

In the Western Cape, small-scale fisheries value chains are more complex and extensive than those along South Africa’s eastern and north-eastern coastline, where small-scale fisheries are relatively non-commercialised and subsistence-oriented. One of the most economically important value chains in the the Western Cape is based on the small-scale snoek fishery (which includes ‘traditional’, ‘commercial’ and ‘interim relief’ subsectors). Isaacs (2013), Hara (2014), and Wentink (2014) provide detailed studies of the snoek value chain, from harvesting to final market sale. Snoek has played an important role in the food systems for poorer coastal communities in the Western Cape for centuries, providing a cheap, accessible source of food, rich in protein and essential omega oils (Isaacs 2013). The snoek value chain pulls many different actors into its orbit. During the harvesting phase, vessel owners and crew play the central role, with each group being remunerated according to a ‘share system’ in which the vessel owner receives 50% of the day’s catch (to recoup operational costs), with the remaining 50% divided among the crew (Isaacs 2013, Hara 2014). When snoek is landed, it is usually rinsed, de-headed and gutted by fish cleaners, or the catch is loaded directly from the vessels onto vehicles owned by informal buyers

or hawkers known as *langanas* (Schultz 2010; Hara 2014; Wentink 2014). *Langanas* occupy a central position as brokers in the snoek value chain, linking fishers and consumers (Hara 2014). They purchase snoek wholesale at the landing site, and transport it to socio-economically disadvantaged communities in the surrounding area, where they sell it on roadsides at a relatively affordable prices (Schultz 2010; Isaacs 2013; Hara 2014; Wentink 2014). *Langanas* also sell snoek to local fish shops, and factories where value is added by freezing, smoking and other processes (Isaacs 2013; Hara 2014).

Though fishers make a critical contribution to the snoek value chain, beyond the harvesting phase, they have little involvement (Raemaekers et al. 2010; Isaacs 2013; Hara 2014; Wentink 2014). Ultimately, the position of fishers at the first link of the snoek value chain means that they receive a disproportionately low share of the final market price (Hara 2014). At the same time, fishers bear high costs and risks (Isaacs 2013; Hara 2014): (1) vessel crewmembers and owners risk their physical health and lives to land the catch; and (2) vessel owners have high financial costs associated with licensing, maintaining and repairing their vessels, while also having considerable fuel, gear and bait costs (Isaacs 2013; Hara 2014; Wentink 2014).

The exact price that fishers receive varies greatly from day-to-day, and is determined by several supply and demand factors, mostly outside of the control of fishers. Supply depends on the availability of snoek at the fishing grounds, which is itself subject to inter-annual and seasonal fluctuations in snoek stocks (Hara 2014). When snoek is abundant, the price that fishers receive at the landing site drops dramatically as the market is rapidly flooded (Hara 2014; Isaacs 2013). Given that fishers lack formalised marketing structures, and cooling and freezing infrastructure to store their catches, they are forced to sell their fish on the day of harvest, thus reducing their leverage to negotiate a satisfactory price with *langanas* (Raemaekers et al. 2010, Wentink 2014). Though the exact profit margins at each stage of the snoek value chain are not known because of the commercially-sensitive nature of this information, research clearly indicates that fishers are 'price takers', rather than 'price makers', with *langanas* essentially dictating the price and the landing site (Raemaekers et al. 2010; Isaacs 2013; Hara 2014; Wentink 2014).

Another economically important value chain in the small-scale fisheries of the Western Cape revolves around WCRL. Once known as a 'food of the poor', (van Sittert 1993), WCRL has become a high-value species that is unaffordable to low-income communities (Sowman&Cardoso 2010). The small-scale WCRL fishery has not been subjected to detailed and comprehensive value chain research, though Wentink (2014) recently laid a foundation for such research. The broad outlines and key dynamics can be drawn from Wentink (2014), as well as from literature on the large-scale WCRL sector, and from literature dealing broadly with small-scale fisheries fishing activities, and socio-economic conditions in the Western Cape.

What emerges clearly from the literature is that the small-scale WCRL fishery value chain is limited to the harvesting phase, mainly because small-scale fishers are only allocated a few WCRL permits, and because they lack the infrastructure and assets required to engage in post-harvest storage and processing (Sauer et al. 2003; Raemaekers et al. 2010; Wentink 2014). Therefore, most of the WCRL caught by small-scale fishers is channelled (formally and informally) into the large-scale or 'offshore' WCRL fishery value chain, where it is processed and exported by established fishing companies (Sauer et al. 2003; Raemaekers et al. 2010; Wentink 2014). The harvesting phase of the small-scale WCRL value chain is done by fishers (vessel owners and crew) using 'nearshore commercial' quotas and interim relief permits. Significant, though unknown, numbers of fishers also participate in unregulated WCRL fishing activities, harvesting WCRL without quotas or permits (Schultz 2010, 2015).

Small-scale fishers cannot rely on any formally organised marketing system to get a fair price for their WCRL catches – fishers are thus price-takers. In some cases, fishers sell all of their fresh catch (none is kept for consumption) directly to the local restaurant and hospitality enterprises, where it

is marketed at a significant (though unknown) profit margin to middle- and upper-income customers (Raemaekers et al. 2010; Wentink 2014). However, in most cases fishers sell their catch in its entirety through local brokers who live in their community, and who work in alliance with buyers from outside the community. As Schultz (2015) has documented on the Cape Peninsula, fishers perceive the outside buyers as having ties to specific companies that are active in large-scale WCRL fishery. The research suggests that the alliance between local brokers and buyers critically important, functioning as the main conduit connecting the small and large-scale WCRL fishery value chains. In essence, local brokers give buyers access to small-scale fishers’ catches. Local brokers can usually play this role because they occupy leadership positions in the fishing community, so buyers are directly linked to the broker’s fisher constituency, and ultimately, to the local WCRL catch. With a ‘captive supply’, buyers negotiate marketing arrangements with local brokers, who act on behalf of their fisher constituency – fishers usually do not have play a role in negotiating these arrangements. Buyers usually pay the local brokers, who take a percentage before making final payment to fishers at the end of the fishing season (Schultz 2015). Although there is no conclusive evidence in the literature, Schultz’s (2015) research suggests that buyers also supply the money that local brokers use to issue cash loans to fishers in advance of their catches. These advances (known locally as *voorskots*) enable fishers to sustain themselves and their households in difficult financial times, but also establish a debtor-creditor relationship between fishers and brokers, effectively giving brokers – and by extension buyers – power over fishers.

The prices that fishers receive for their WCRL catches vary considerably. No comprehensive study has looked at prices fishers receive, but research suggests that prices range from as low as R60/kg, to as high as R150/kg (Wentink 2014; Schultz 2015). The price that buyers offer to local brokers is dependent upon the quality of the catch, which is best during the summer months (Pollock et al. 2000). Buyers also consider the current export price in Asian markets, and negotiate with local brokers accordingly – when export prices are low, fishers receive lower prices (Pollock et al. 2000; Wentink 2014). Crucially, the price that fishers receive is a function of the power hierarchy in the small-scale WCRL fishery value chain. Buyers exercise the greatest power over the marketing arrangements, and use their financial resources as leverage to dominate price negotiations with local brokers (Wentink 2014; Schultz 2015). Local brokers, in turn, occupy a position of power over fishers, who are obliged to accept the price dictated by the broker because of their debtor-creditor relationship. While there is no detailed and comprehensive evidence in the literature, it is widely known that fishers are often exploited in the marketing of their catches because of these asymmetrical power relations (Wentink 2014; Schultz 2015). Small-scale fishers are connected to the more formal fishing operations, pointing to how the value chain bridges the formal and informal fisheries, so it may be inappropriate to even talk about a small-scale fishery value chain.

Value chain overlaps and intersections

The examples of snoek and WCRL in the Western Cape allude to the fact that small-scale fisheries value chains are not isolated from large-scale fisheries value chains. To understand how benefits from the marine commons are distributed, it is critical to look at how the value chains overlap and intersect. In the case of snoek, several fundamental (though under-researched) connections exist between small-scale and large-scale fisheries value chains. For instance, snoek is not only caught by small-scale fishers, but also by hake and pelagic trawlers which legally harvest about 4 000 tons/year as ‘bycatch’ (compared with 6 000 tons in the commercial and small-scale linefish sectors) (Isaacs 2013; Hara 2014). Therefore, established large-scale fishing companies access to more fisheries resources than they are allocated, while placing additional pressure on snoek stocks, and thereby decreasing the amount of snoek available to small-scale fishers. Another vital connection is that a portion of the snoek caught by small-scale fishers is channelled – via *langanas* – into the value chain of large-scale fishing companies, where a substantial (though unknown) profit is made as the snoek is processed and marketed to supermarkets, fish shops, restaurants, and other outlets (Hara 2014; Wentink 2014).

The connections between small- and large-scale fisheries value chains are perhaps most starkly illustrated by the case of WCRL. No detailed comprehensive data in the literature explores how these value chains intersect, but many first-hand reports from fishers in the Cape Town area indicate that these intersections begin at sea during the harvesting phase (Schultz 2015). Though the large-scale WCRL fishery is formally categorised and regulated as an 'offshore' sector, it is widely known that 'offshore' vessels often operate (often legally) in inshore fishing grounds where 'interim relief' and 'nearshore' vessels are active, effectively competing with these small-scale fishing vessels for the same resource (Schultz 2015). Small-scale fishers argue that established companies are therefore using superior technological capacity (and regulatory sanction) to benefit from WCRL in both the inshore and offshore areas, while depleting the inshore WCRL stocks on which small-scale fishers depend (Schultz 2015).

The intersection between small- and large-scale WCRL fisheries value chains continues through to the post-harvest phase, since small-scale WCRL catches are channelled into the large-scale WCRL fishery value chain, then established companies conduct the post-harvest processing and exporting phases. From small-scale fishers' perspective, buyers from outside of their communities play a critical role at the marketing interface between these two value chains. Many fishers state that buyers use their alliance with, and influence over, local brokers to facilitate the circulation of raw product *from* fishers on the ground, *to* established fishing companies with which the buyers are alleged to have ties (Schultz 2015). At the same time, buyers are said to enable money to circulate *from* established companies *to* small-scale fishers (via their local brokers) (Schultz 2015). In this sense, it could be argued that the small-scale WCRL value chain is a sub-component of the large-scale WCRL value chain. While the transactions between these value chains have not been researched, small-scale fishers contend that there is a large disjuncture between the prices they receive for their WCRL catches, and the final export price (Schultz 2015).

3. IMPLICATIONS

The brief review of the literature presented thus far demonstrates that small-scale fishing communities are either marginalised by, or adversely incorporated into South African fisheries economic and regulatory dispensation. This marginalisation has direct implications for the equitable use and governance of South Africa's fisheries resources, such as: (1) the structure of fisheries value chains reinforces the economic disempowerment of small-scale fishing communities; (2) established large-scale fishing companies hold most of commercially-lucrative fishing rights, and own and control most infrastructure and assets required for post-harvest value-adding, while small-scale fishing communities only participate in the value chain by providing raw product and labour, so ultimately, large-scale fishing companies earn the greatest benefits from the fisheries value chain (Raemaekers et al. 2010; Wentink 2014).

The asymmetries between large- and small-scale fisheries in South Africa also have implications for livelihoods in poorer coastal communities. Although it is often argued (as in the NDP) that large-scale fisheries sustain more livelihoods than small-scale fisheries, the claim is misleading. Recent literature (Raemaekers et al 2010; Sunde&Raemaekers 2010) suggests that small-scale fisheries in South Africa sustain far more livelihoods than large-scale fisheries do. Small-scale fisheries are labour-intensive, and they use low levels of capital and technology, so these fisheries could potentially make an even greater contribution to the livelihoods of poorer coastal communities (FAO 2014). However, without substantive reform of the fisheries economy and governance system, the full potential of small-scale fisheries to support local livelihoods is inhibited.

The orientation of the fisheries economy in South Africa towards large-scale fisheries also has implications for the food security of poorer coastal communities. Although large-scale fisheries contribute to food security in South Africa's low-income communities, this contribution is presently

outweighed by the fact that most large-scale fisheries’ products are exported, therefore bypassing the local and national food system. At the same time, species such as snoek and WCRL that once played a central role in the food systems of poorer coastal communities in the Western Cape and Northern Cape have increasingly been captured by post-harvest processing in large-scale fishery value chains, which export these resources to middle- and upper-income food retail markets, and away from the local food systems of which they were once a key component.

While large-scale fisheries focus on producing food for export, small-scale fisheries produce food for local consumption, and play a critical role in supporting the food security of poorer coastal communities throughout South Africa (Sowman&Cardoso 2010; Raemaekers et al. 2010). Small-scale fishing methods require little capital and technology, enabling poorer coastal residents fairly easy access to a healthy source of food. At the same time, fish caught by small-scale fishers passes through few (if any) value chain phases on its way from the sea to the plate of local households, and fish is often distributed through informal social networks for free, or at very low cost. Yet the contribution of small-scale fisheries to local food security is delimited by its disadvantaged position within the broader fisheries economy and governance system.

Finally, the fisheries dispensation depicted in the literature has important implications for the democratic rights of South Africa’s small-scale fishing communities. The first wave of post-apartheid policy and legislative reforms failed to address the structural asymmetries in the fisheries economy. Insofar as fishing rights have been re-distributed to small-scale fishing communities, these allocations have effectively ended up in the post-harvest phases of large-scale fisheries value chains, cancelling out the re-distributive intentions of this governance reform. The reproduction of these structural asymmetries has meant that small-scale fishing communities continue to struggle for their Constitutional right for equitable access to, and benefits from, the marine commons.

4. DISCUSSION

Having reviewed some of the key literature on South Africa’s fisheries value chains, livelihoods, food systems, and governance, a number of critically relevant insights emerge in the context of the current wave of fisheries reform, which are worthy of further discussion. Given that South Africa’s post-apartheid fisheries dispensation, thus far, largely mirrors that of pre-1994 fisheries (van Sittert 2002; Crosoer et al. 2006; Ponte&van Sittert 2007; Sowman et al. 2014), the new wave of fisheries governance reform catalysed by the 2007 Equality Court Order, is therefore highly significant in that it re-opened political space for previously excluded small-scale fishing communities by forcing the state to give effect to their Constitutional right to have equitable access to, and benefits from, the marine commons. With the confluence between the imminent implementation of the SSF Policy, the amendment of the MLRA to legislate for the policy’s implementation, and the new round of fishing rights allocations, the appropriate regulatory conditions have been created for the state to substantively reform South Africa’s fishery economy in accordance with the Constitution (Sowman et al. 2014).

In essence, the state is legally obligated by the Court Order to recognise and allocate rights to small-scale fishing communities, and to support the development of their fishing activities. As existing commercial fishing rights expire soon, there is a crucial administrative opportunity for the state to re-allocate quotas and meet its obligations by re-distributing fishing rights from established large-scale fishing companies to small-scale fishing communities. However, as with the first wave of fisheries reform between 1994 and 2007, the second wave of reform is likely to encounter significant challenge from established large-scale fishing companies, and the vested political-economic interests that they represent (Sowman et al. 2014). Anticipating a new wave of fisheries reform, and specifically the possibility of a significant re-distribution of fishing rights has reinvigorated the fundamental tensions between asymmetrical power and democracy

that featured so prominently during the first wave of fisheries reform (Schultz 2015). Briefly put, giving effect to the Constitutional rights of small-scale fishing communities requires that the current reform process democratises key aspects of the fisheries economy and governance system, yet such reform threatens the dominance of large-scale fishing companies, and thus lays the ground for intense political contestation between these two sets of actors.

The outcome of the current wave of fisheries reform will have a direct effect on the livelihoods and food systems of low-income coastal communities. While large- and small-scale fisheries in South Africa both make vital contributions to employment, income and food in poorer coastal communities, emerging literature indicates that the contribution of small-scale fisheries has been underestimated, and is possibly more significant than that of large-scale fisheries (Raemaekers et al. 2010; Sunde&Raemaekers 2010; Sowman&Cardoso 2010). The claim is supported by the international literature, which confirms that the inherently labour-intensive and low-cost nature of small-scale fisheries makes them uniquely suited to support local livelihoods and food security in poorer coastal communities (FAO 2014). Due to the lack of detailed and critical analysis of the relative contributions of large-scale and small-scale fisheries to livelihoods and food security in South Africa, it is not possible to predict with certainty what the outcome of the current reform might be. However, growing evidence suggests that if small-scale fishing communities were to receive economically-viable fishing rights, and strong state support (including funding and capacity-building), local livelihoods and food security in these communities would likely be positively impacted.

5. KNOWLEDGE GAPS

As indicated throughout this review, existing literature on fisheries value chains, livelihoods and food systems in South Africa leaves several important knowledge gaps. In particular, many of the central dynamics of the fisheries economy are still unknown. Though economic studies have provided a broad description of the various sectors of South Africa's commercial fisheries (Mather et al. 2003; Sauer et al. 2003), they leave several critical questions unanswered. Therefore, detailed and focused research is needed, exploring the economic, political, and social dynamics of small- and large-scale fisheries value chains in South Africa.

First and foremost, research is needed on the precise structure of value chains for fisheries' species that are economically significant. Crucially, such research should trace the complex web of ownership and control in large-scale fisheries value chains. The research should also address the knowledge gaps about pricing and profit margins at the various phases of the value chain. In particular, research should establish the basic facts about the difference between the prices that small-scale fishers receive, and the final price that their catches get on the market. The point about prices alludes to the critical knowledge gap about connections between small- and large-scale fisheries value chains. Research should urgently look into the ways that small-scale fisher's catches flow into the value chains of large-scale fishing companies, and the ways that money flows from the latter to the former.

Future research should also address the relative contribution of large- and small-scale fisheries value chains to livelihoods in South Africa's socio-economically disadvantaged coastal communities, about which there is currently no conclusive information. Comprehensive baseline research is needed into the number of direct and indirect livelihoods generated by small- and large-scale fisheries respectively. Economic studies are needed to identify and compare the number of livelihoods that small- and large-scale fisheries generate compared to the amount of fisheries resources these sectors are allocated. Research is also needed on the capital to labour ratio of the different fishery sectors across the industry. In the context the NDP's points about job creation and employment, such research is essential to the status assigned to these different sectors.

The poor understanding about the relative contributions of large- and small-scale fisheries to South Africa’s food systems and food security, should be addressed through comparative economic studies. Such comparative research should: (1) seek to accurately quantify the total amount of fish that large- and small-scale fisheries direct into local food systems; (2) calculate and compare the ratio between the total amount of fish directed towards local consumption and total amount of fish produced; and (3) document the prices consumers pay at the point of sale for food produced by small- and large-scale fisheries respectively, and analyse the nutritional value of this food.

In addressing these knowledge gaps, it is vital for research to give balanced attention to the Eastern Cape and KwaZulu-Natal, so as to avoid reproducing the fisheries literature’s prevailing Western Cape bias. Power relations must also be placed at the centre of fisheries value chain, livelihood and food system analysis. It is imperative for research to confront the structural and micro-political power asymmetries in South Africa’s fisheries, to get a clear understanding of the pattern of benefit distribution flowing from South Africa’s marine commons to the multiple and divergent actors involved.

6. CONCLUSION

The realisation of a more equitable fisheries dispensation in South Africa requires a critical understanding of how benefits from the marine commons are distributed. This paper sought to make a small contribution to this end by reviewing some key literature on small- and large-scale fisheries in South Africa, with the specific aim of assessing the state of knowledge with regard to fisheries value chains, livelihoods, and food systems. Large-scale fisheries have received far greater attention in the literature, while small-scale fisheries have only recently begun to receive focused attention by social science scholars. Furthermore, research disproportionately focuses on Western Cape fisheries, while fisheries in the Eastern Cape and KwaZulu-Natal have largely been overlooked. Many of the fundamental dynamics of the fisheries economy remain unknown, including the connections between small- and large-scale fisheries value chains, and the exact profit margins present in these value chains. These gaps notwithstanding, it can be concluded from existing literature that, despite various policy and legislative reforms, post-apartheid South Africa’s fisheries economy and system of governance continues to be to facilitate the dominance of large-scale fishing companies in fisheries value chains, thus disempowering small-scale fishing communities, and undermining their role in supporting local livelihoods and food security.

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