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## GLOBEFISH RESEARCH PROGRAMME



## The role of women in the seafood industry

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# **The role of women in the seafood industry**

by

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## **EXECUTIVE SUMMARY**

### **Objectives**

The Food and Agriculture Organization's GLOBEFISH Programme commissioned Marie Christine Monfort, economist and seafood marketing expert, to explore and shed light on a rather unknown aspect of the seafood industry: the role of women.

This worldwide desktop study, the first of its kind, presents what is known, and what remains to be investigated in this crucial component of the seafood industry. The primary aim is to disseminate available knowledge and raise the awareness of policy makers and business leaders on the essential role of women in this industry and the inequity they experience. Some initiatives taken to reduce discrimination are presented in the last part of the report.

The desk work was carried out during the first quarter of 2015. This study, carried out during a short period of time, may be partial, yet it confirms what has been said in other forum and reports. Further political commitment and will is required to improve the knowledge, the understanding and at the end, the status of women in the seafood industry for the benefit of the global seafood communities.

### **Scarcity of data**

On the global scale, quantitative and qualitative data on the role of women is sparse and when available it may be of poor quality and only cover some segments of the industry. Thus, knowledge and understanding of the very complex distribution of roles, power, access to resources and profits between genders are incomplete and vary greatly between regions and industry sectors.

Of the six countries (Republic of Croatia, the Arab Republic of Egypt, the French Republic, the Republic of Iceland, the Republic of India and the Republic of Senegal) studied in this report, only Iceland collects gender disaggregated data over the full employment spectrum in the seafood industry. Sociological, anthropological and economic studies on the role and power distribution between genders are still rare. The quality of data varies greatly between countries and, interestingly enough, it is not linked to the level of economic development. Developing countries such as India and Senegal offer rather good records because these important fishing and aquaculture nations have received the attention of gender sensitive development aid agencies. In contrast, the role of women in the industry is still poorly documented and studied in most developed countries.

This work clearly evidences that there is a crucial lack of data and understanding of the issue.

### **One in two seafood workers is a woman**

When considering the seafood industry as a whole, with fisheries, aquaculture, seafood processing and all related services, women represent half of the total working population worldwide (World Bank, 2012; OECD, 2014). Women are essential

contributors to this important food supplying industry and therefore critical agents for change.

Women participate in all segments of the industry, but to variable degrees. They constitute a high proportion of workers in subsistence aquaculture, in artisanal and industrial processing, in fresh fish trading and retailing, in environmental organisations, and occupy most administrative positions. On the other hand, there are very few women in industrial fishing and in leadership positions.

On average, 47 percent of the 120 million people who work in the capture fisheries and post-harvest sectors are women. The assessments provided to FAO report that women accounted for more than 15 percent of all people directly engaged in the fisheries primary sector in 2012, and that the proportion of women exceed 20 percent in inland fishing (FAO, 2014). On the global level, women's role in aquaculture is estimated at 70 percent of total workforce, all production modes included.

Whatever the type of processing whether fresh fish or frozen fish cutting, or putting in tins and whatever the input transformed (whether finfish, shellfish, or molluscs), women represent the dominant proportion of the labour force in seafood processing. A recent World Bank survey (World Bank, 2010) suggests that 85.5 percent of fish processing workers worldwide are women. A FAO report considers that as high as 90 percent of all workers in secondary seafood activities, such as processing, are women (FAO, 2012a).

There is no global data describing the population of women working in national, regional, or local administrations in charge of reporting, implementing aquaculture and fisheries and related activities. Nor for Professional associations, quality inspection, environmental NGOs or Researchers, marine and social sciences, but partial and local observations indicate that there are numerous women working in these fields.

Women occupying high management positions in the seafood industries and services are very rare. This is not a question of qualifications or achievements, but the result of invisible barriers. This restriction on women's career advancement, called the "glass ceiling", is not specific to the seafood industry (neither to women), but is particularly acute here.

**Women’s participation in the seafood industry, intensity of participation**

	No/low	Medium	High
Industrial fishing (high capital intensive)	X		
Industrial aquaculture (high capital intensive)	X		
Professional organisations	X		
Fisheries management	X		
Leadership level	X		
Small-scale fishing (low capital intensive)		X	
Fisheries support activities (ashore)		X	
Ex-vessel selling and marketing		X	
Administration		X	
Quality inspection		X	
Researchers, marine and social sciences		X	
Source of knowledge other than scientific		X	
On-shore aquatic items collecting			X
Small-scale aquaculture (low capital intensive)			X
Seafood processing			X
Environment activists			X
Seafood purchase for households			X

**Cultural and societal barriers and discrimination**

Where information is available, there is evidence that women’s participation is constrained or affected by strong cultural rules, robust societal conventions and even, in some cases, by discriminatory laws.

On average, based on an international scale, women spend twice as much time on household work as men and four times as much time on childcare. Time devoted to these tasks is not spent on productive work, and the money spent on food, care and education can’t be saved to be spent in productive inputs. The lack of time may prevent women from taking opportunities to improve their knowledge and upgrade their qualifications.

Women are barred from some seafood related jobs, such as going to sea on-board fishing vessels. They may be deprived from ownership rights, and thus hindered from running fish farming businesses, or they may not be allowed to access finances and insurances services. Their limited access to capital limits their access to modern and competitive technology in fishing, farming, processing and storing fish, and limits their capacity to upgrade their knowledge and skills. Women in the sector are marginalised in planning and policy-making and unless this is changed, they will continue to suffer inequalities and discrimination,

**Signs of further deterioration**

Globalisation has brought mixed socio-economic outcomes for men and women involved in the seafood industry. If some people benefitted from new emerging work and business opportunities, for various reasons women tend to win less than men, and sometimes tend to even be left behind. Ongoing global changes are drastically altering

the sharing of human, financial and natural resources on a worldwide scale, with a disproportionate effect on women. Research carried out on this topic indicates that women in coastal areas depending on seafood as a source of revenue or a source of food are particularly affected by these changes.

The decline in marine stocks has caused the adoption of new fishing practices, including moving to alternative areas, further from the coast or further from the sites where the fishers live, and buying new fishing gears. These changes have been disadvantageous to women. In many cases, women don't have the necessary resources: capital to upgrade their fishing equipment (engine, new gears) and to preserve the fish quality (ice, boxes), and time to get to the more distant sites. They cannot afford to move too far away from their homes where they take care of the family.

Globalisation generates severe consequences on fragile populations, among which women are numerous.

### **Some initiatives**

This study has evidenced that attention to women in this industry is given by global institutions and by development agencies. Associations also work at improving women's status and their fair participation in the industry. Thus, we could not find a single example of a women-dedicated project initiated by the private business, by contrast with what is observed in other industries,

After forty years of changes in society, research and reports, and international conferences, the importance of providing women the same rights as men and to recognise their contribution as an important agent for growth and a key driver for poverty reduction is now widely acknowledged, and is slowly but surely entering public policies. In this matter, the United Nations has played and still plays a persuasive role in promoting these issues within the international agenda. But we will see that policies to reform the seafood industry still have a long way to go to fully resolve this issue.

Development and donor agencies are key players in the economic and social progress of developing countries. Since the Beijing Conference, international development and donor agencies began putting gender policies in place. The first years after the Millennium, with full recognition of MDG3, the inclusion of the gender perspective was boosted in the project approaches and evaluation of gender began to be implemented.

In 2015, FAO ran an investigation on the relevance of monitoring an international network for women at leadership level in the seafood industry. As we publish this report, the results of a survey carried out on 40 professional women showed an interest for such a network. Its objectives, strategy, means and governance remain to be settled.

The European Union, which has been promoting gender equality from the start (Rome treaty) has taken a further step in its revised treaty signed in Amsterdam in 1999. Visible signs of this commitment in the seafood business environment are more recent. European institutions including the Commission and the Parliament now encourages national governments to be more "gender sensitive" in their policies. One effective means of persuasion is to introduce gender issues as selection criteria in the attribution

of subsidies, which was launched a year ago. But much effort still needs to be undertaken to sensitize national fisheries policy makers and business operators, to which this concept is either not understood or considered low priority.

Several positive initiatives have been detected among associations. Several women networks have been launched in the past two decades. They have all been active at inception, but lost their enthusiasm with time, due to lack of finance and time devoted to them and, in some cases, due to the lack of clear objectives and sustained human and financial means to achieve them. Their survival is often the result of the will and enthusiasm of one or two women.

In Europe, the association of women shellfishers is often cited as an inspiring model. In July 2014, the Australia-based association “Aquaculture without Frontiers” launched an Aquaculture Women’s Network.

When it comes to private operators, this research has evidenced that the seafood industry in general, and its leaders in particular, have proven to be oblivious to gender issues, unaware of the discrimination that women undergo and, in the end, to be generally unsupportive of women.

We have not found one single in-service initiative addressing the gender inequality or a programme directed to promotion or empowerment of women in private corporations in the seafood industry.

## **Conclusion**

The knowledge and understanding of the very complex distribution of roles, power, access to resources and profits between genders are incomplete and vary greatly between regions and industry sectors. This report includes six case studies (Croatia, Egypt, France, Iceland, India and Senegal) that review the state of knowledge in the field. It illustrates that the quality of data is not linked to the level of economic development. Developing countries such as India and Senegal, for instance, offer rather good records because these important fishing and aquaculture nations have received the attention of gender sensitive development aid agencies. By contrast, the knowledge of the participation of women in the seafood industry in France is dramatically poor.

Where information is available, in both developing and developed countries, there is evidence that women’s participation is constrained or affected by strong cultural rules, robust societal conventions and even, in some cases, by discriminatory laws. The seafood industry is ruled by patriarchy paradigm, where hierarchy, authority, power, competition, development, control of human and natural resources and domination of others is shaped by males to their welfares. The conditions of participation of both genders in the industry and related services are organised according to these rules at all levels from workers to decision makers. Women are barred from some seafood related jobs, such as going to sea on-board fishing vessels. They may be deprived from ownership rights, and thus hindered from running fish farming businesses, or they may not be allowed to access finances and insurances services. Consequently, their limited access to capital limits their capacity to invest in modern and competitive technology in

fishing, farming, processing, storing fish, and limits their capacity to upgrade their knowledge and skills. The presence and participation of women at decision making levels is even rarer, and at top management level they are simply excluded.

On-going global changes including the demand for cheap inputs, the widespread decline in marine resources, the deterioration of marine habitats and the impact of climate changes, among other things, further affect already fragile populations, to which many women belong.

Over the past decades, researchers and development experts have produced evidence of the crucial role of women in fisheries, and the gender specific constraints they face, but this knowledge has hardly ever been disseminated among seafood professionals.

The primary aim of this report is to increase consciousness of business leaders and policy makers, to enlarge their knowledge and sensitization about the value women bring to the seafood industry, and to encourage them to consider each time they develop a new investment, a new project or a policy: “Have we not overlooked women?”

### **Case Study**

This last section reviews the state of knowledge and awareness on women’s participation in the seafood industry in six countries. The selected countries represent different social and economic contexts: the Republic of Croatia, the Arab Republic of Egypt, the French Republic, the Republic of Iceland, the Republic of India, and the Republic of Senegal. In each country, we measure the level of knowledge and the level of awareness of women’s situation in the seafood industry, not the actual level of disparity or discrimination. This simple tool is not meant to run comparisons between countries