



**Medium & Large Scale  
Aquaculture Sectors in Malawi:  
Prospects for growth**



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# Importance of fish in Malawi





- ✓ Contributes about **28%** (30%) of the country's animal protein supply.
- ✓ Fisheries and their associated value chains such as processing, marketing etc. are a source of food security and livelihoods for many.
- ✓ Fisheries (capture fisheries and aquaculture) contribute about **4%** of Malawi's GDP employing about 700,000 people directly or indirectly.
- ✓ One report puts the GDP at **7.2%**.



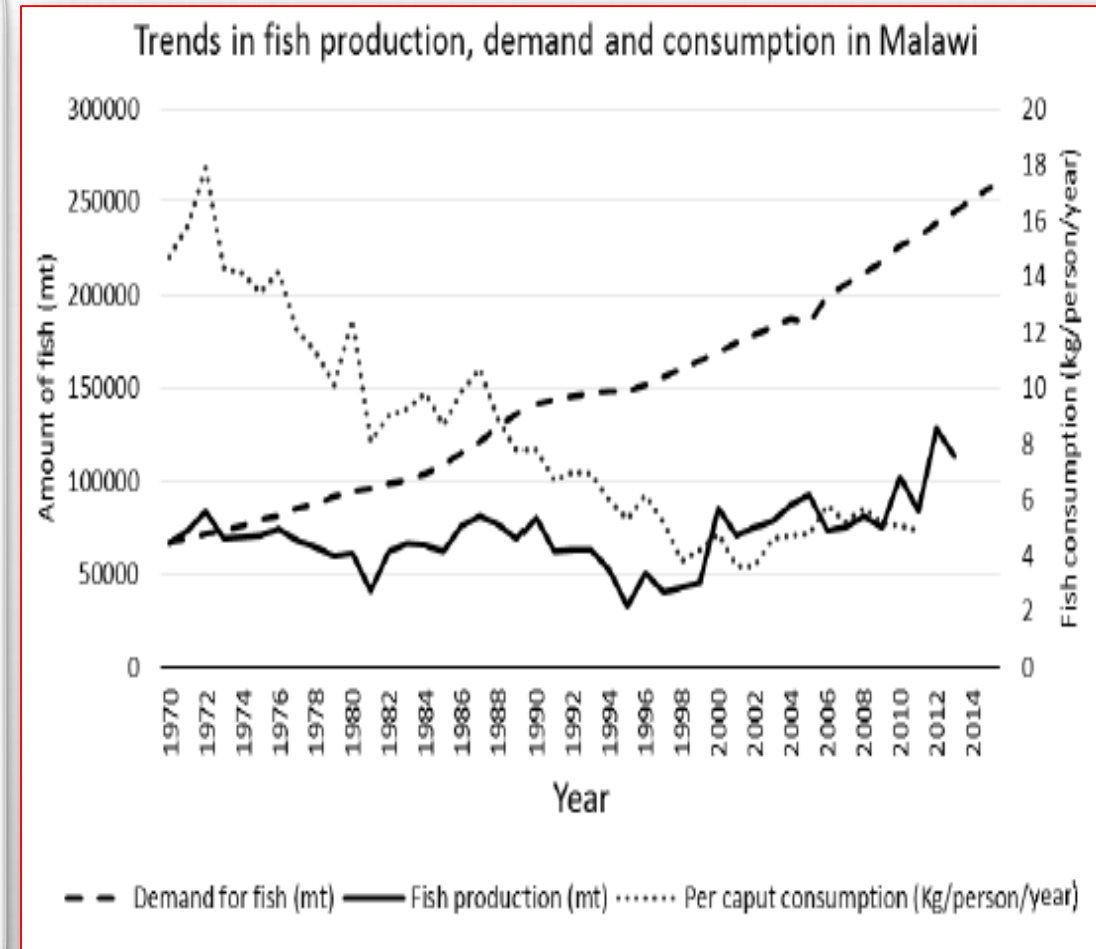
# Dwindling catches vs increased demand

- ✓ Fish supply in Malawi is generally from capture fisheries and imports with **75%** coming from Lake Malawi.
- ✓ Catches have nevertheless, drastically declined (now at 182,110 tons) due to over-exploitation of fish stocks to meet the increasing demand.
- ✓ Total catches in Lake Chilwa (2<sup>nd</sup> largest in Malawi) have also dropped by more than a third since the 1990's worsened by the lake's periodic drying.





- ✓ Individual fish consumption is currently estimated at **5.6** kg/year from **14** kg/year in the 1970s representing a **60%** drop.
- ✓ Demand for animal protein, including fish, is expected to double by 2050 due to population growth and rising incomes.
- ✓ It is apparent that reclaiming wild fish stocks won't be an easy road.
  - ✓ Rapid population growth, poverty, political landscape dynamics, inadequate resources etc. continue derailing fisheries management efforts.
- ✓ **Aquaculture:** a new paradigm shift



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**Aquaculture in Malawi:**  
**Opportunities for the growth of  
Medium & Large Scale Sectors**

- ✓ High potential for the growth of the aquaculture sector in Malawi.
- ✓ 10–20% of Malawi's land area (1.1m ha) suitable for fish culture.
- ✓ Malawi also has 35,000 ha of underutilized wetlands that can be used for aquaculture.
- ✓ A network of rivers and streams including numerous small water bodies for aquaculture scattered all over the country.
- ✓ A conducive warm climate favouring growth of fish in captivity.

- ✓ An agro-based country able to produce main raw materials for making fish feed e.g. soybean, maize bran, rice bran etc.
- ✓ High interest in the aquaculture sector from government, NGOs, private sector, development partners e.g. GIZ (AVC Project), AfDB (SFAD project) etc.
- ✓ High potential for the development of cage culture.





The background of the slide is a light gray gradient. In the top-left and bottom-right corners, there are several realistic-looking water droplets of various sizes, some overlapping. The text 'Aims of the Presentation' is centered in a white rectangular box with a thin black border.

# **Aims of the Presentation**

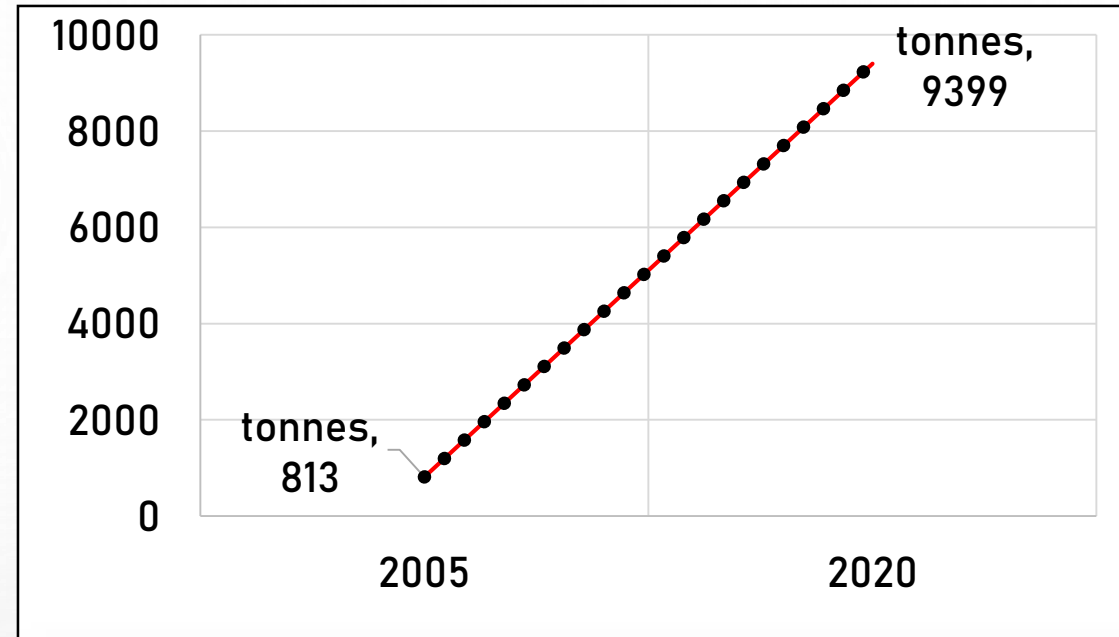
- ✓ Identify **challenges** hindering aquaculture development in Malawi & discuss **strategies** for addressing them.
  - ❑ Why is there low investment in the sector despite the huge potential? What can be done?
- ✓ Present to policy makers, investors & other stakeholders in the fish value chain **opportunities** within the aquaculture sector.
- ✓ Discuss ways of creating an **enabling environment** for aquaculture development in Malawi, with options for cross-learning with other SADC member states.
- ✓ Draw **best practices** & **lessons** from other SADC member states.



**Challenges/Bottlenecks to  
Medium & Large Scale  
Aquaculture growth in Malawi**



- ✓ Although the sector has grown over time from **813** tons in 2005 to over **9,000** tons in 2020, aquaculture in Malawi remains at subsistence level and farmed fish production is still low.
- ✓ Between 2005 and 2015, aquaculture accounted for just **1–5%** of Malawi's total fish production.
- ✓ **Small ponds** (avg. size: 200m<sup>2</sup>).





- ✓ Slow growing indigenous **fish species**
  - ✓ Widely raised species is *Oreochromis shiranus* and *Coptodon rendalli*
- ✓ Lack of proper **feed**
  - ✓ Fish feed is predominantly maize bran
  - ✓ Commercial feed currently being imported from Zambia and is expensive





- ✓ Inadequate **capital** to invest in large scale/commercial aquaculture
- ✓ Unavailability/expensive **materials**
  - ✓ Solar equipment
  - ✓ Aerators
  - ✓ Netting materials
  - ✓ Pond liners
- ✓ Unregulated/uncontrolled **fish imports**
  - ✓ Huge volumes of low priced imported fish suffocating local producers





**Best Practices and  
Lessons from other SADC  
member states: Zambia**

- ✓ Now the 6<sup>th</sup>/7<sup>th</sup> largest producer of farmed fish in Africa (from 750 tons in the 80s to >20,000 tons present).
- ✓ Among biggest producers of tilapia in the SADC region with some of the largest freshwater commercial farms in Africa on Lake Kariba.
- ✓ Large-scale commercial aquaculture sector accounts for 71% of the country's aquaculture production.





# **Drivers of Large Scale Aquaculture in Zambia**



- ✓ Introduction of **large intensive cage culture** operators in Lake Kariba (Siavonga).
- ✓ More than 100 cages on Lake Kariba now.
- ✓ Intensive fish feeding in the cages as high as 40mt/day – one firm.
- ✓ Improved access to **high quality feeds** (large feed manufacturing plants).





# Drivers for commercial aquaculture - Zambia

- ✓ Improved access to **high quality seed** (large privately owned hatcheries)
- ✓ Introduction of a new **aquaculture policy** that provided **enabling environment**



# Best Practices and Lessons from Zambia

- ✓ The growth of the commercial sector has stimulated the development of the feed sector – a **chick and egg scenario**.
- ✓ Numerous existing livestock feed mills have now invested into the development of aquafeeds over the last 12 years.
- ✓ Large-scale commercial operators ventured into **partnerships** with feed mills to better control supply, quality and prices of feeds.
- ✓ Government's **Aquaculture Seed Fund** benefited more than 3,000 entrepreneurs along the fish value chain throughout the country including medium & large scale youth entrepreneurs.





**Triggers** of the Large Scale  
Aquaculture Sector  
elsewhere in Africa



- ✓ Commercial aquaculture production flourished due to the **intensification of private sector controlled small and medium scale enterprises.**
- ✓ Public support, expertise, foreign direct investment, interest in aquaculture, global awareness raised through the New Partnership for Africa's Development (NEPAD).
- ✓ Introduction of **new aquaculture production systems** such as tanks and cages as well as the improvement of current production systems.
- ✓ Expediting, coordinating and adopting policy reforms to create a **conducive environment for business.**

- ✓ Development and adoption of **aquaculture-centered policies** and **strategic framework**.
- ✓ Governments facilitating provision of **soft credits** and **incentives**.
- ✓ **Research** activities in the species characterization, selective breeding and low-cost diet production.
- ✓ On-farm participatory research using model farms and private enterprises are yielding fast aquaculture **technologies transfer** via farmer-to-farmer pathways.
- ✓ **Value addition**: freezing, smoking, drying, as well as cold smoking of catfish fillets for export to European markets.



**WHERE  
DO WE GO  
FROM HERE?**

thank  
you