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World Wide Fund For Nature

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## **TERMS OF REFERENCE: GENERAL IMPACT OF COVID-19 ON FISHERIES AND THEIR SUPPLY CHAINS WITH A SPECIFIC FOCUS ON SMALL-SCALE FISHERIES.**

### **BACKGROUND**

In December 2019, China recorded its first case of the novel Covid-19 virus. By January 2020, the virus had spread rapidly resulting in shutdowns over large regions of China. The first case outside of China was reported in Thailand on 13 January 2020. The USA reported its first case on the 21<sup>st</sup> January, making it the first country in the Americas. France was the first European country to report Covid-19 on 24<sup>th</sup> January 2020. In Africa, the spread was initially very slow with the first case reported on 14<sup>th</sup> of February 2020 in Egypt. South Africa reported its first case on 5<sup>th</sup> of March 2020. On the 11<sup>th</sup> March 2020, the World Health Organization declared Covid-19 a global pandemic, by then the virus had spread to 114 countries, infected 118 000 people, and killed 4291 people. Fast forward 7 months later we now have over 35 million cases, and more than 1 million deaths in 200 countries. Although several countries have seen a decline in infections and deaths, the pandemic is far from being over and the long-term effects are largely unknown.

According to the FAO, Covid-19 has had a substantial impact on fisheries and aquaculture. The steps countries took to limit and control the spread of the virus inadvertently impacted the entire seafood supply chain. Some of the measures included total country lockdowns where only food and medical services were permitted to operate. Although in many instances' fisheries were considered essential services and permitted to operate, the closure of fresh seafood markets, restaurants, hotels along with severe travel restrictions, limitations on exports and imports completely disrupted local and international supply chains. In some countries, seafood supply outweighed demand causing prices to fall resulting in reduced income. Additionally, Covid-19 quarantine, distancing and cleaning protocol made it impossible or extremely difficult for some fisheries to operate.

South Africa is no exception to this impact which was felt by certain sectors right at the start of the pandemic. A key example is the West Coast Rock Lobster fishery where more than 90% of legal and some illegal catches go to China. There is a high demand for lobster in China and its very popular at weddings, funerals, and events such as the Chinese New Year celebration. However, once it became apparent that the source of the outbreak was a wet market the Chinese government had no choice but to close the market. A few weeks later as cases continued to climb



the Chinese government temporarily banned all trade and consumption of wild animals including seafood. These restrictions essentially lead to the collapse of the WCRL export market. Fishers were in trouble; holding tanks were filling up fast and it was becoming expensive to keep lobster alive.

The sector then turned to the local market for assistance however this in itself was not successful for various reasons including 1) pricing – local markets are less willing to pay premium prices compared to export markets 2) Sustainability – WCRL is listed Red on the WWF-SASSI seafood guides so several retailers and restaurants refused to purchase it. 3) Lockdown – South Africa joined many countries in March 2020 by implementing a total lockdown one of the strictest in the world. As a result, any possible local market opportunity was lost, as seafood counters, restaurants, accommodation, and conference facilities were all closed.

The WCRL fishery is just one example of a sector hit by Covid-19, the linefishery, tuna pole and line and large pelagics have all been affected as their primary markets both local and overseas of restaurants and hotels were closed for extended periods of time. When international markets were eventually opened, the lack of international flights made the transport of fresh catch intermittent and more expensive. Even large-scale commercial sectors were impacted, however, not as severely, many of them were able to make it through this period due to diverse fishery operations that allowed them to supply different markets creating some resilience.

Unfortunately, it is become more and more evident that the fishing sectors most impacted by Covid-19 are made of small-scale fishing communities that even before Covid-19 suffer from extreme levels of poverty, food insecurity, high unemployment, and crime rates. Covid-19 has made many of these issues worse.

The Covid-19 pandemic has not only highlighted the vulnerability of communities to adapt to a changing environment but also highlighted vulnerabilities in supply chains. Because sectors depend heavily on a single part (China in the case of WCRL, restaurants/ hotels in the case of linefish), when those markets closed/collapsed there was no alternative for the fishers. There was no plan B.

## **OBJECTIVE /PURPOSE**

The purpose of this study will be to conduct a socio-economic analysis of the impact of Covid-19 on seafood supply chains in South Africa with a more detailed focus on small-scale fishing communities. This study will also explore possible measures that can be implemented to ensure better resilience and adaptability.

## **DELIVERABLES**

### **The study will be in two part.**

- Part 1:



- An overview of the socio-economic impact of Covid-19 on key South African fisheries through telephonic / electronic surveys with fishery associations. This survey will be used to identify the most impacted fisheries in South Africa, the specific reasons for the impact, and to understand what coping/mitigation measures were deployed during the pandemic.
- Part 2:
  - In depth assessment of the impact using 2 – 4 fishing communities in each of the key coastal provinces, namely Northern Cape, Western Cape, Eastern Cape, and KwaZulu-Natal. A more detailed survey is to be developed looking at the following key points: impact on access, fishing operations, markets both formal and informal, sales, access, influence of fishing rights (recreational, small-scale, interim relief or commercial), influence on food security due to disruptions to fishing livelihood, presence of IUU, and any mitigation strategies developed or implemented during that time. These surveys need to be done electronically (telephone) as there is limited resources for travel. If needed, WWF-SA can assist the successful applicant in contacting the various small-scale fishing communities.
- The final report should include the following:
  - A synthesis of the impact based on the results collected for Part 1 and Part 2.
  - Summary of any mitigation strategies used during this period it can be through government or community lead interventions.
  - Recommendations for building resilient fisheries and adaptive supply chains for both small-scale and commercial fisheries.

### **TIMELINE:**

- 1) Proposals are due 31 October 2020.
- 2) WWF-SA will communicate with successful candidate within 10 days of submission date.
- 3) Deadline for draft report is 31<sup>st</sup> March 2021.
- 4) WWF-SA will review DRAFT and provide feedback by 14<sup>th</sup> April 2021.
- 5) Final report is due 7<sup>th</sup> May 2021.

### **QUALIFICATIONS/REQUIREMENTS:**

- 1) Experience in working with South African fisheries.
- 2) Experience in socio-economic analyses.
- 3) Ability to speak another language in addition to English (E.G. Afrikaans, Xhosa, Zulu) would be advantageous.

### **APPLICATION PROCEDURE:**

Interested candidates are hereby requested to apply, by emailing the following to [mstassen@wwf.org.za](mailto:mstassen@wwf.org.za)



- A detailed proposal with a brief description of why the applicant considers themselves as the most suitable for this project, and a detailed clear methodology, on how they will approach and implement this project activity.
- The proposal should also consist of a personal CV, indicating education background/professional qualifications, most relevant experience, and contact details (email and telephone) of the candidate.
- A budget proposal that indicates an all-inclusive fixed total contract price, supported by a breakdown of costs.
- A draft timeline that indicates when each component of the project will be completed.

**If you have any questions regarding this Terms of Reference or interested in performing this work, please send through a project proposal with budget and timeline to [mstassen@wwf.org.za](mailto:mstassen@wwf.org.za), Applications are due 31 October 2020.**