



Country Report: The South African Abalone Sector

28 February 2023

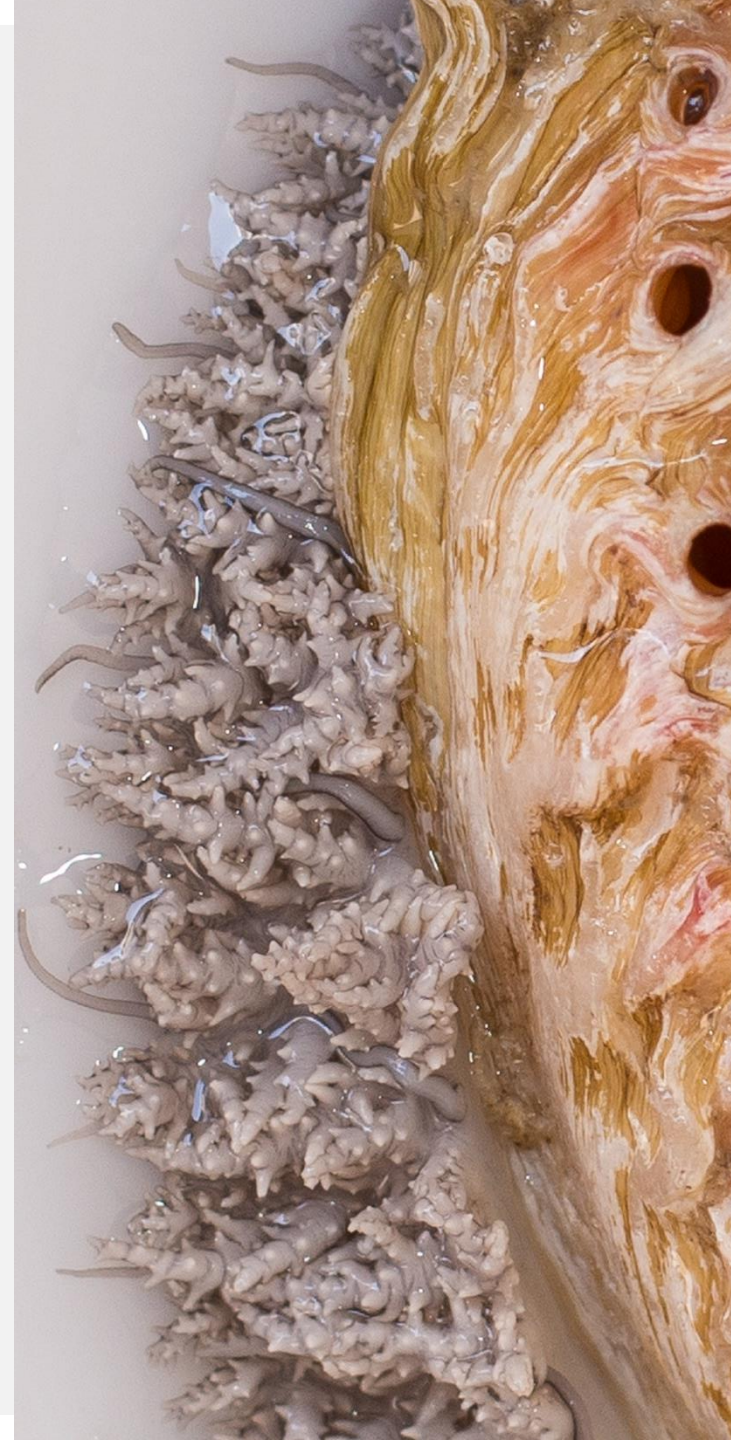
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*Chair, Abalone Farmers Association of South Africa

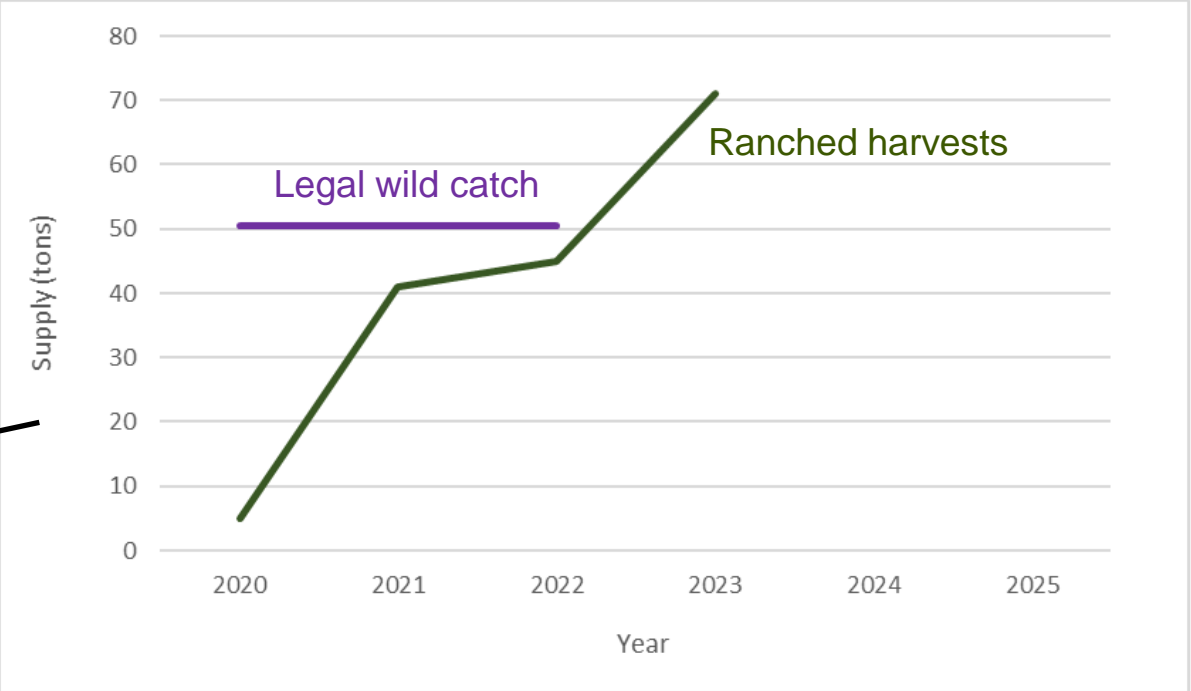
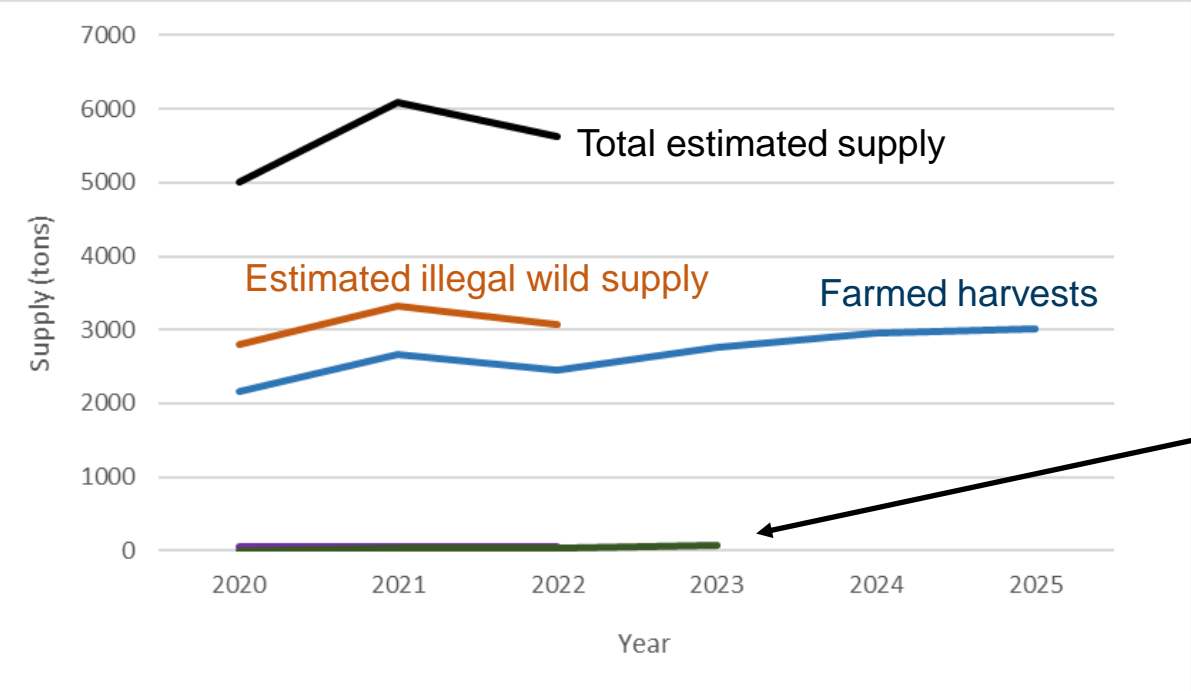
+Rhodes University

Introduction

- One species, *Haliotis midae*
- Purely a wild fishery from the 1950's to the 1990's
- A farming sector emerges in the 1990's and has grown to be the largest outside of Asia.
- Also in the 1990's, the wild TAC begins to decline and the fishery becomes dominated by illegal operators.
- Ranching started at small scale around 2013 and 2020 saw the first small-scale harvests.
- No local market, most is exported to China, with the bulk of the farmed product going to Hong Kong.



Overall supply trends



Source

Farmed figures: Abalone Farmers Association of South Africa

Estimated illegal wild supply (2020-2021): M. Burgener, Traffic, pers comm

Estimated illegal wild supply (2022): Average of previous two years. Trade data not available yet.

Ranched harvests: producer data (2020-2022) and forecasts (2023)

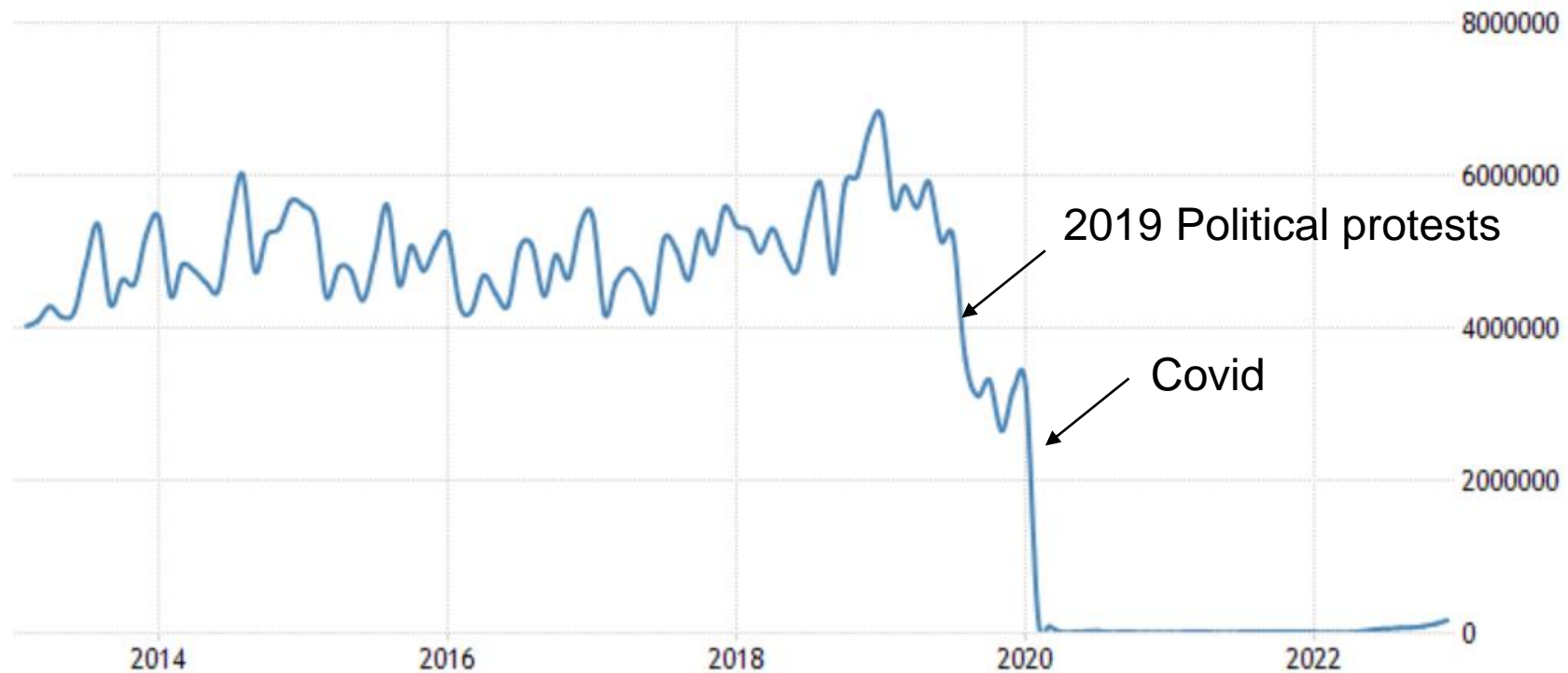
Status of the farmed sector

Hong Kong Visitor Arrivals

Summary

Stats

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Approach to the market

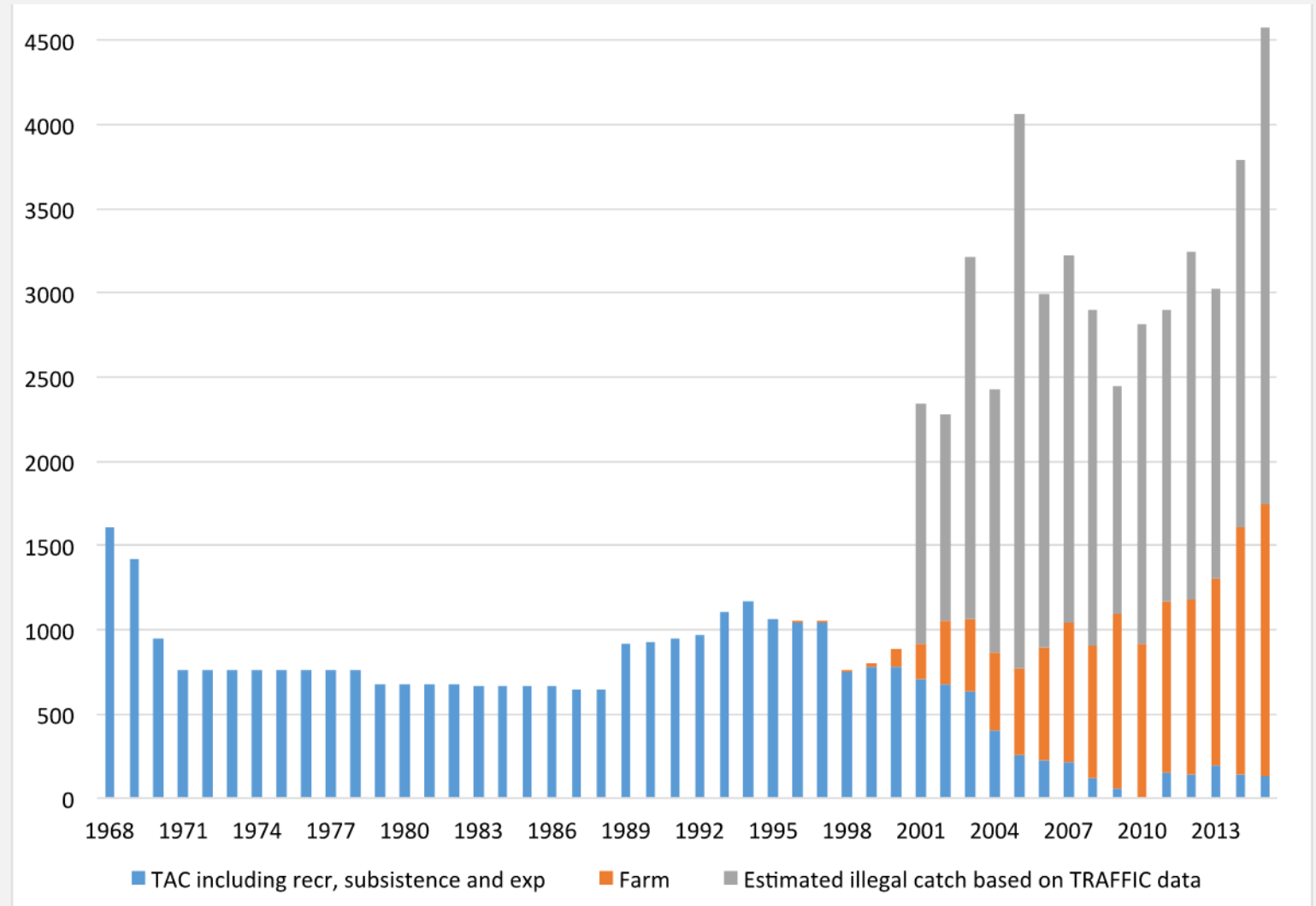


Farming forward



The wild fishery:

- Initially well-controlled in terms of catch-rates
- Catches became unsustainable from 1990's



Adapted from Raemakers et al. (2011)

What drove the development of the illegal fishery?

- At the end of the Apartheid government (1994) the benefit of the resource was shared amongst five white-owned companies.
- The fisheries sector was slow to transform to a model of equal participation
- This led to frustration and poaching being considered acceptable

When the broader model for participation did arrive...

Not enough Incentive or Institutional arrangements for rights holders to invest in resource protection.

- Short term rights of initially 1 year, then 10
- Constant threat of fishery closure
- Fishing zones initially not exclusive
- Rights not transferable
- Catch Quota's not economically viable
- Broader context: lack of employment opportunities attracted non-rights holders to poaching
- Enforcement could not cope

A potential solution: abalone restocking & ranching

8 No. 33470

GOVERNMENT GAZETTE, 20 AUGUST 2010

No. 729

20 August 2010

DEPARTMENT OF AGRICULTURE, FORESTRY AND FISHERIES
MARINE LIVING RESOURCES ACT, 1998 (ACT NO. 18 OF 1998)

PUBLICATION OF THE GENERAL GUIDELINES FOR MARINE RANCHING AND STOCK
ENHANCEMENT IN SOUTH AFRICA

and

PUBLICATION OF THE GUIDELINES AND POTENTIAL AREAS FOR MARINE RANCHING
AND STOCK ENHANCEMENT OF ABALONE (*Haliotis midae*) IN SOUTH AFRICA

- Private investment in restocking and sustainable fishing
- Longer rights (15y)
- Exclusive zones (10-40km)
- Right to reseed
- Legal right to protect stock (private security)

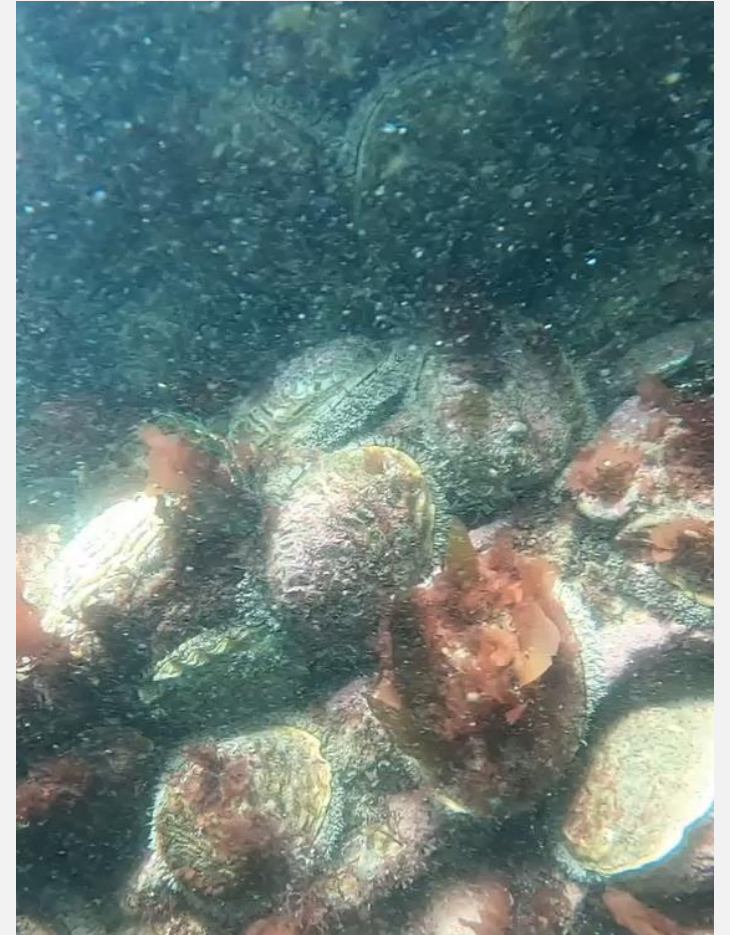
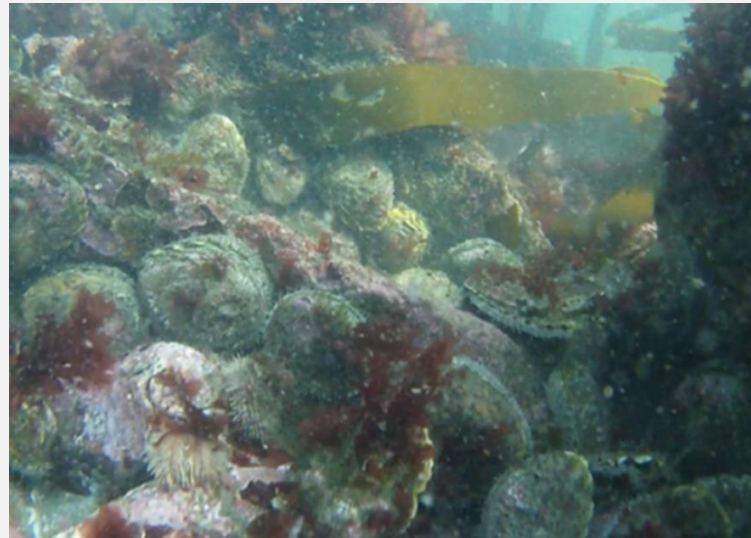


Stock Enhancement and Ranching Zones



Current status

- Three rights holders producing small volumes.
- Is it biologically feasible? Yes.
- How quickly will it scale is the question.
- Parallels with the start of the farming industry.



Farms are currently the only funders of reseeding



Thank-you