

FISH MARKETING

Market conditions

The largest species of Fresh water fish processed and exported is the Nile Perch. Other commercially important fresh water species in the domestic market are the small sardine fish (Omena) and tilapia. The catching and processing of Nile Perch in Kenya has grown from a local activity into a major export industry.

Domestic market

The domestic Market commands about 70% of the total fish market. It is however not well defined or organized and involves buying fish at the beach by small scale traders and selling to various open-air markets and fish shops. The fish are sold either dried, fresh or processed for later consumption. The Artisanal Fish Processors (AFPs) prepare dried and smoked fish. Nairobi forms one of the main destinations for fish from Lake Victoria, Naivasha, Coast (marine) and even Tana River Dams. The main markets in Nairobi are Gikomba and City Markets. In the year 2000, the total fish traded in Nairobi was 12,253 metric tonnes, valued at KES 121million. Other local markets include Central and Eastern Provinces, who buy fish from fish farmers in the Tana River Dams. Some parts of Rift Valley Province also receive fish from Lake Turkana, Naivasha and even Lake Victoria. The markets in other districts are fairly small however with increase in aquaculture in almost all counties Fish consumption has been on increase and fish produced in the ponds is mainly consumed in the areas of production, with hotels in the rural towns being major outlets.

Export market

The Nile Perch accounts for 84% of the total fish exports followed by the tuna accounting for 13% while the other species account for 3%. Kenya's main markets for the Nile Perch are, Far East, Israel and EU (Netherlands, Belgium, Germany, Portugal, Italy, France and Spain) which accounts for about 62% of all fish exported from Kenya. The other markets are North America, the Middle East, and other African countries. It is important to note that, meeting safety standards is important for the industry's future.

In the year 2013 a total of 6,742 metric tons of fish and fish products were exported. The exports

earned KES 2,568,886,000 in foreign exchange. Fish and fishery products exported were mainly Nile perch fillets, fish maws, Octopus, sharks, Sword fish, Crabs, Tilapia, Marine, Barbus shell and fish skins. Nile perch fillet exports accounted for 76.5% of the total quantity and 84.73% of the total earnings. Fish maws contributed 5.6% in quantity and 11.3% in value while Octopus contributed 4.8% in quantity and 3.2% in value. This year's Nile perch fillets export decreased by 21.8% from the previous year's export of 12,425 metric tons. By country destination, Israel had the lion's share of Nile perch exports at 4,420 metric tons or 45% of the total Nile perch exports. Israel was followed by Netherlands with 1,786 metric tons (18%), Portugal with 585 metric tons (6%), UAE with 441 metric tons (5%) and Australia with 410 metric tons (4%) (See Fig. 6). By product type the exports of frozen Nile perch fillet contributed the highest percentage which is 66% (6,358 metric tons) followed by fresh fillets 29% (2,852 metric tons), frozen headless and gutted Nile perch 5% (498 metric tons), and fresh headless and gutted Nile perch 0.03% (3 metric tons)