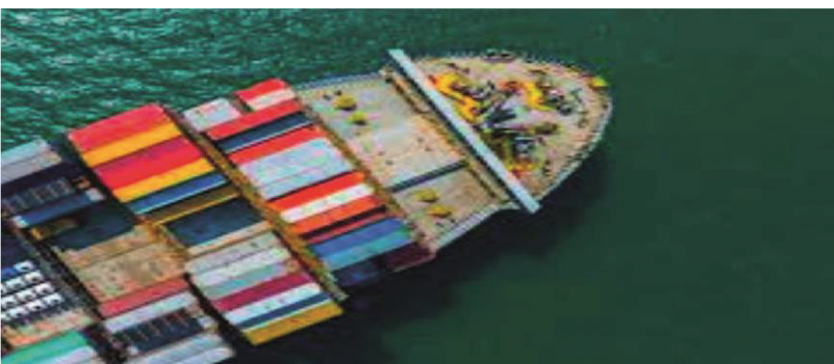




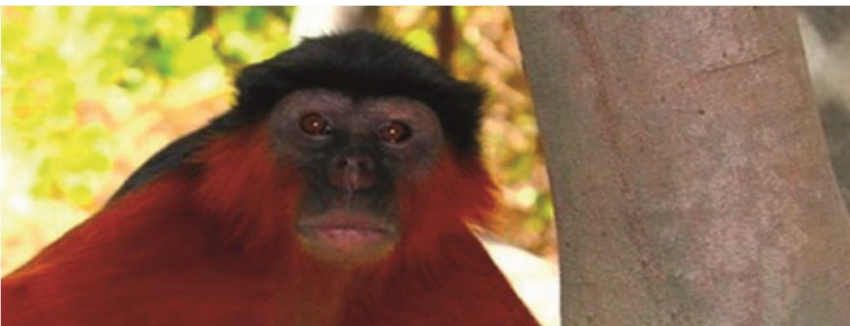
National Export Strategy 2021-2025

THE GAMBIA

THE SMILING COAST OF AFRICA



SECTOR PROFILE THE RIVER GAMBIA



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Summary of the NES

The National Export Strategy (NES) 2021–2025 is a critical roadmap to guide The Gambia towards export growth and diversification, recalibrating the economy away from its dependence on low value-added commodity trade; helping Gambian businesses to enter global value chains; and facilitating its post-COVID recovery, growth and resilience.

The Gambia is a small economy that has been operating with a trade deficit for many years, with heavy dependence on imports (which account for 80% of trade). In addition, The Gambia is heavily dependent on the export of goods, particularly, rain-dependent agricultural products.

The government, through technical support from the Commonwealth Secretariat to the Gambia Investment and Export Promotion Agency, is advancing the second National Export Strategy (NES II), which attempts to diversify exports, strengthen expanding sectors and contribute to the achievement of the overarching objectives of the National Development Plan (NDP) and the Sustainable Development Goals (SDGs). NES II is comprehensive and targeted, with a focus on ownership, implementation, sustainability and resilience (especially within the context of COVID-19).

The NES (2020-2025) focuses on supporting The Gambia’s export-ready firms to enter regional and global value chains, particularly in value-addition horticulture and agro - processing, groundnuts, cashew, fisheries, light manufacturing and services, and more especially tourism, to bring further benefits to the country. The Government of The Gambia (GOTG) wants to bring about economic stability, grow employment and drive entrepreneurship.

In designing NES II, critical consideration was given to ensuring that the Strategy was comprehensive and targeted, paying particular attention to ownership and implementation. Most importantly, it was key that the revised NES was relevant to the needs, objectives and priorities of the government and people of The Gambia; had clearly defined and actionable strategies and actions that could be effectively implemented; that the design reflected the government’s ongoing and planned policies and initiatives, efficiently complementing and reinforcing them; that the NES generated the greatest impacts for beneficiaries; and that both activities and results of the NES were sustainable, measurable and actionable.

In this regard, the priority sectors and cross-cutting areas for this NES have been reviewed, refined and strengthened to align with the government’s other policies, plans and projects and to complement rather than compete with other ongoing initiatives.

Priority Sectors and Cross – Cutting Areas under NES II

PRIORITY SECTORS		CORE CROSS-CUTTING AREAS
1. TOURISM		1. Transportation and trade facilitation
2.HORTICULTURE	AND	2. Information and communications technology (ICT)
AGRIBUSINESS		3. Access to finance
3. FISHERIES		4. Human resource development
4. GROUNDNUTS		5. Research, intelligence and innovation
5. CASHEW		
6. LIGHT MANUFACTURING		

The NES II seeks to bring out key successes through; (i), **Resilience**, (ii), **Removing Supply Constraints**, (iii) **Moving up the Value Chain – Value addition**, (iv) **A Market-Driven Approach**, (v) **Strengthening the Country Brand**, (vi) **A Sustainability-Driven NES**, (vii) **Strong Stakeholder Involvement**, (viii) **Excellent Institutional Support**, (ix) **A Distribution-Oriented Focus**, (x)

Women and Youth Impact and Inclusiveness, (xi) Measurable Results.

Vision

The vision of the NES was stated as follows: ‘An efficient and globally-competitive export sector that is innovative, inclusive, resilient and responsible.

Mission

The mission to support the vision is as follows: ‘To fully utilize Gambia’s human and natural resources to drive export growth.

The Goals of the National Export Strategy

The National Export Strategy (NES) was designed as a practical roadmap for The Gambia to achieve increased levels of economic development, by focusing its limited but valuable resources on developing export capacity in those priority sectors for which The Gambia has the greatest potential for export development. The specific goals and expected targets from effective delivery of the National Export Strategy 2020–2025 are as follows:

- To build a stronger, more responsible, robust and resilient economy
- To diversify export markets
- To move the economy up the value chain through higher value-generating export activities
- To improve the brand image of The Gambia in the international markets and to showcase The Gambia as a quality exporter of strategic products
- To use exports as a tool to alleviate poverty through high-value job creation
- To attract more foreign direct investment in the priority sectors, particularly for high value generating activities.
- To create a more inclusive economy that invests in and values human capital
- To drive resilience through sound export strategies
- To encourage and facilitate innovation

As a practical roadmap, the National Export Strategy (NES II) was designed for The Gambia to achieve increased levels of economic development, by focusing its limited but valuable resources on developing export capacity in those priority sectors for which The Gambia has the greatest potential for export development, those utilizing the human and natural resources to drive export growth.

With the evolving global dynamics on macro – economic variables, trade and investment, the Agency developed a new strategic plan for the period 2023 – 2027 to provide the Agency with a strategic direction to better serve the country and attract potential investors, improve the export value, enhance market access for MSMEs and develop the entrepreneurship culture aligning with developed policies and strategies such as the new NDP – Green Recovery, NES II with a firm commitment to achieving the SDGs.

Sector Profile

The River Gambia

Unlocking the Potential of the River Gambia

The River Gambia is one of The Gambia's greatest assets. In fact, the river literally runs through the middle of the country forming an 'artery' that connects East and West and divides North from South. The country exists as a small strip of land area to either side of the river. The River Gambia is also one of the most important waterways in West Africa.

The political separation between The Gambia and Senegal has long hindered the development of the resources of the river and its basin, though in 1978 the two countries established The Gambia River Development Organization (joined in 1980 by Guinea).

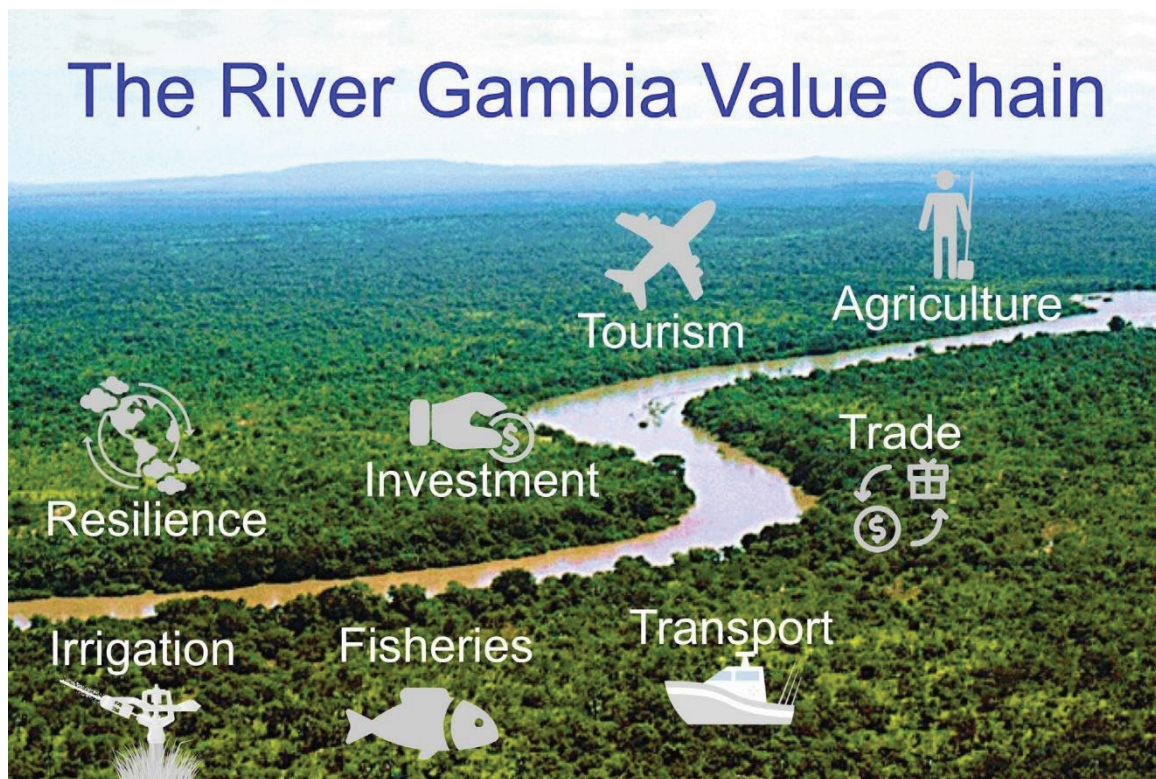
Figure 8.1 Map of The Gambia, showing the River Gambia



Source: VektorStock.com 2020

The river has a vast value chain and can play a critical role in the economy. The river can be used for transportation, trade, tourism, agriculture and fisheries, and has a key role to play in the resilience of the country (see Figure 8.2).

Figure 8.2 The River Gambia value chain



Source: Tourism Intelligence International 2020

The River Gambia has been valued historically for its importance in transportation and trade. The river is one of the most navigable of the African rivers; its chief value, therefore, has been its transportation function. As the main artery of The Gambia, it is the principal means of transporting passengers, freight, goods and mail. River transport is still a key mode of transporting groundnuts. North-south river crossings are provided by ferries, such as those plying between Barra and Banjul, Banni and Kerewan, Farafenni and Yelitenda, and Kau-ur and Jessadi. The recent construction of the Senegambia Bridge (opened in January 2019), which connects north Senegal to its southern territory, is a further addition to the transportation importance of the river. The river is also an alternative to road transport.

The river can be further used for irrigation purposes, since it flows with sufficient water capacity throughout the year (even in the dry season) and can help reduce the effects of rain (or the lack of rain) on the agriculture sector during the dry season. The river is already used for the growing of rice and other crops, particularly in rural communities. Further assessment and development are required.

Fisheries is another important element along the river value chain. The river fisheries include freshwater areas in the Central River and Upper River Divisions and the brackish waters of the upper estuary areas. Some of the most abundant species are tilapia, African bonytongue, various varieties of catfish, *Labeo senegalensis* and aluminium fish.¹ The shrimp and tonguesole caught along the river are purchased by industrial fishing companies for processing and export, primarily to Europe.

Tourism is another area where the River Gambia can add tremendous value. The river presents great opportunities for the lodging sector. In fact, there are already several successful lodges in operation along the river. Furthermore, the river can be used for recreational and leisure purposes, for example, kayaking, canoeing, swimming, rafting, river cruises and the like. The limit is the imagination.

The river is not being sufficiently used as a key tourism asset and unique selling proposition for Gambian tourism. The current sun, sand and sea positioning could be complemented with water, wood, wildlife and wetlands. The River Gambia can also play a key role in boosting community tourism. Consider, for example, the initiative of the Ninki-Nanka trail and the role the river can play in bolstering domestic tourism.

In addition, the River Gambia has significant environmental and ecological importance. Ecological studies conducted in the 1980s identified five ecological zones along the River Gambia, namely lower estuary, upper estuary, lower freshwater river, upper freshwater and headwaters (Moll and Dorr 1985)² However, only three, the lower estuary, upper estuary and the lower freshwater river, lie within Gambia's borders.

In conclusion, the value chain of the River Gambia is vast and far-reaching. However, the country has only narrowly seen the potential of the river and has not sufficiently taken advantage of its true economic and wealth-generating prospects.

8.1 The River Gambia Strategy and Key Strategic Actions

There is currently no comprehensive River Development Plan. The National Development Plan currently 'pigeonholes' the river for its role in transportation and does not consider its full value chain possibilities. In addition, there are only limited and outdated environmental and ecological studies of the river.

It is important to recognise the River Gambia as a key source of growth for The Gambia and key to its resilience.

As such, the following strategic initiatives are proposed:

1. Survey the river (aquatic life, depth, transport, strategic areas, development opportunities, etc.)
2. Develop and map with stakeholders the River Gambia value chain
3. Identify existing activities along the river
4. Undertake a needs assessment (investment, development opportunities, HR, transport, bridges, infrastructure, etc.)
5. Carry out feasibility studies of priority activities and opportunities
6. Carry out development activities at strategic locations along the river, for example, build bridges, erect buildings, support, optimise irrigation systems, etc.
7. Investigate the role of the River Gambia in strengthening the resilience of The Gambia economy
8. Develop a Master Plan for the River Gambia
9. Approve, fund and implement the River Gambia Master Plan
10. Assess existing river infrastructure such as inland wharfs and carry out initiatives for their appropriate resurrection / rehabilitation / implementation, where needed.

Endnotes

¹ Columbia.edu (2004) [Water Resources](#), retrieved 2019

² [Water Resources](#), retrieved 2019