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**GENERAL FISHERIES COMMISSION FOR THE MEDITERRANEAN**

**COMMITTEE ON AQUACULTURE**

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**PROGRESS REPORT OF THE ACTIVITIES OF THE WORKING  
GROUP PROJECT “DEVELOPMENT OF A STRATEGY FOR  
MARKETING AND PROMOTION OF MEDITERRANEAN  
AQUACULTURE PRODUCTS”**

**BACKGROUND**

1. At its fifth session held in Spain in June 2006, the Committee on Aquaculture (CAQ) established a Working Group on Marketing of Aquaculture (WGMA), taking into account the outputs of a CAQ workshop on sea bass and sea bream markets held in May 2006. The workshop identified a number of constraints on aquaculture factors such as: data poor situation on marketing; environmental concern affecting public image of aquaculture products; limited government support on marketing problems; low competitiveness of sea bass and sea breams as well as problem on its potential further expansion. The workshop identified a series of priorities in support of a strategy for Mediterranean aquaculture products.
2. In November 2006 during the CAQ Coordinating Meeting of the Working Groups (CMWG) a project in support to the activities of the WGMA was prepared and endorsed by the GFCM at its 31<sup>st</sup> Plenary Session (January 2007), as part of the short-medium term programme of work of CAQ. The Spanish government offered its support in financing the project (MedAqMarket).
3. The Project in “Support to the GFCM Working Group on Marketing of Aquaculture Products: Development of a Strategy for Marketing and Promotion of Mediterranean Aquaculture” (Secretaría General de Pesca, Ministerio de Agricultura, Pesca y Alimentación) was finalized by the GFCM Secretariat in the fall of 2007 and became operational in April 2008 for a duration of 16 months.

## OBJECTIVES AND AIMS

4. The MedAqMarket Project aimed at increasing the understanding of the situation of marketing of aquaculture products in the Mediterranean and at supporting the members countries in implementing a strategy for the development of marketing of aquaculture products. The Project has as main goal the definition of a mid-term programme on aquaculture marketing in order to improve the sustainability of the industry in general as well as the liaison between the administrations, private sector producers and consumers.

5. In particular the Project foreseen the following five main outputs:

- 1) preparation of a synthesis of the status of aquaculture marketing in the Mediterranean and preparation of mid term plan for aquaculture marketing strategy.
- 2) preparation of three studies on marketing of commodities other than seabass and gilthead seabream.
- 3) The creation of a network of professionals in marketing of aquaculture products at country level, which will be involved in the provision of inputs, such as for regional data bases.
- 4) The inclusion of a marketing database in the SIPAM information system designed with the support of the project.
- 5) The preparation of a draft framework strategy for national policy and decisions makers in aquaculture with clear market recommendations and a follow-up project proposal.

## PROGRESS AND ACTIVITIES OF THE PROJECT

6. The work programme of MedAqMarket for this period (April–November 2008) foresees outputs as summarized below.

### **Preparation of a synthesis and a mid-term plan for aquaculture marketing strategy**

7. A Standard Annotated Outline for the National Country Report on Marketing (Appendix 1) was prepared. An international expert on marketing was recruited to prepare a data formats for the national reviews, in cooperation with the Coordinator of the WGMA.

8. The standard serves as basis for national reports focused on the assessment of the marketing situation in the whole Mediterranean area. The national reports include among other information: the size and structure of the enterprises; concentration of the demand and offer supply; traceability; echo labelling and certification; subsidies; potential of markets; national exports and imports market; national image of aquaculture; interaction with capture fisheries products. The use of standardized national format in all countries would allow a comparative analysis on the situation and the formulation of follow-up activities through the preparation of a synthesis of the status of aquaculture marketing and the preparation of a mid-term plan.

9. Some countries were briefed about the activities of the project during different venues. The first briefing occurred at the Annual General Meeting of the FEAP (Federation of European Aquaculture Producers) in May 2008 in Gran Canaria, Spain, included 42 representatives from Spain, France, Italy, Greece and Turkey. The second briefing took place at the IUCN Workshop on the traceability, labelling and certification of aquaculture products on the third Guide for the Sustainable Development of Mediterranean Aquaculture. The meeting was held in Tunisia in June 2008 and was attend by 30 participants coming from 9 countries. Cooperation has been implemented with IUCN on the preparation of the guidelines on certification. During this meeting, a draft of the structure and

content of the Marketing Data-bases and Trade Data Collection was presented, and discussion was held on the Country Market Profiles and on the studies on marketing commodities. The Coordinator of the WGMA also presented MedAqMarket during the joint FEAP/MedAqua meeting (held in Bodrum, Turkey, in October 2008).

### **Preparation of studies on marketing of commodities**

10. The preparation of documents on marketing of important commodities for aquaculture industry, other than sea bass and gilthead seabream, is another expected output of MedAqMarket. These studies aimed at identifying marketing and production opportunities for species reared and for which the information are still limited (market and technology issues).

11. During the meeting held in Tunisia (back to back with IUCN Workshop), it was suggested to start the preparation of commodities for the meagre fish (*Argyrosomus regius*) that at the moment, represents the most evident new marketable Mediterranean marine aquaculture species. An expert has been recruited. The document (GFCM:CAQ/VI/Dma.3) includes first information collected on trends, for both cultured and wild meagre from the Mediterranean.

12. Although species diversification is an integral part of any effort to promote aquaculture development, it was judged to be of less urgency than a correct assessment of the current production and market conditions and the establishment of an efficient, network of information sources on the market. Certainly in a second phase it would be necessary to investigate the potential for other commercially viable species for both the northern Mediterranean producing countries (with their European-market orientation) and the southern Mediterranean producing countries and local markets. This may include species such as *seriola*, octopus, algae.

### **The creation of a network of professionals in marketing of aquaculture**

13. The establishment of a Mediterranean network of experts on marketing, to inform on the situation of the markets at country level and possible interactions between products and sub-sectors, is also considered within the MedAqMarket initiative.

14. The preparation of the national reports will serve also as basis for the establishment of regional network of experts. At the moment for some countries (Albania, Croatia, Cyprus, Greece, Italy, Montenegro, Morocco, Spain and Turkey) experts have been involved in the data collection and preparation of national report. Confirmation of the appropriate candidates is ongoing for the rest of the GFCM member countries.

15. The attendance of the MedAqMarket to the meetings mentioned above is also part to the support on the establishment of the network of experts.

### **The inclusion of a marketing database in the SIPAM information system.**

16. The improvement of the compilation of SIPAM production data including those on hatchery and feed production and analysis of markets and trade of sea bass, sea bream products and aquaculture finfish marine products (size, qualities, process, products, etc) will help MedAqMarket to frame the structure of the database.

17. Target group for aquaculture marketing databases (MDB) are:

- Small to medium sized enterprises with limited resources to access expensive sources of market information
- Countries/Authorities – to help in formulating production expansion plans, forecasting potential supply/demand problems etc.

Coverage: Sea bass and sea bream in a first period.

18. The Aquaculture Marketing Data Base will be structured in four sections: a first section called “Fish Market Portal” dedicated to the main information available on the web and related to the fish market. A second entitled “National Market Data” will focus on market fish price, and on import/export, many of those already exist in the SIPAM Data Statistics and Data Production Centre. A third section on “Demographic Data” will include selected indicators (per countries, per years). 4. Others relevant issues and opportunity information for aquaculture marketing.

<b>AQUACULTURE MARKETING DATABASE</b>			
<b>1. Fish Market Portal</b>	<b>2. National Market Data</b>	<b>3. Demographic Data</b>	<b>4. Others</b>
a. Direct connection to main reference markets <sup>1</sup> (Madrid, Milano, Rungis, Tunis, ...)	a. Production figures <sup>2</sup> – Yearly On-growing, Juvenile, Feed, import/export figures, wild origin.	a. Population (age distribution)	a. Feed conversion ratio (FCR)
b. Direct connection or links to “Fish meal” and “Fish oil” prices	b. Marketable Fish prices - Ex-farm -Wholesale (Farmed & wild) central fish market prices - Retails (Farmed & wild) supermarkets: reference from largest local chain	b. Average household size	b Traceability, labeling and certification schemes
c. Links to Globefish portal and main reports	c. Juveniles prices	c. Consumption	b. Other
d. other	d. Price of feed (Price of fishmeal, Price of fish oil	d. Household Income	
	e. Export and import figures (Main export destinations, volumes, values): Whole, fresh, Gutted, fresh/frozen Filleted, fresh/frozen	e. Household Income Breakdown	
	f. Product forms and diversification (value added products availability, volumes)	f. Unemployment	
	g. Seafood consumption per capita	g. other	
	h. Seafood expenditure per household		
	i. Consumer preferences/other		

## **PROGRAMME AND ACTIVITIES FOR THE NEXT PERIOD**

19. It is realistic to expect a delay in the final submission of first data sets and for submission of Marketing National Country Reports (MNCR). The draft of a regional synthesis and qualitative assessment of the Mediterranean Market on aquaculture will be based on the national reviews.

<sup>1</sup> Prices on a weekly basis for all size categories. Other markets with updated sites for prices could also be included (i.e other markets in Italy and Istanbul) Merca Madrid [www.mercamadrid.es](http://www.mercamadrid.es); ; Milano [www.mercatimilano.com](http://www.mercatimilano.com), Rungis (France) [www.rungisinternational.com](http://www.rungisinternational.com). An assessment on the feasibility to this section should be done.

<sup>2</sup> Links with SIPAM National Production and Production Centre databases.

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20. Furthermore country visits will be considered upon receipt of the preliminary draft of the MNCR on a case by case basis, for necessary clarification or support. For some country field mission could be considered for a better understanding of the production characteristic and market availability.
21. The next period will serve also as basis for the formulation of project and workplan for 2010.
22. In particular as partially reported on the document GFCM/CAQ/2008/4, the activities for the 2009 will focus on:
- a. Preparation of national reviews on marketing of finfish marine aquaculture products in the Mediterranean countries. The first drafts MNCR are expected to be completed for comments review by January 2009. Depending on the level of work submitted, it may be necessary to conduct country visits during February 2009. Final MNCR should be submitted by the end of February 2009.
  - b. A Regional Marketing Data Base (MDB) on Mediterranean finfish marine aquaculture products will be finalized (March 2009) and made available on the Web (April 2009).
  - c. The final version on the study on “Market Study on Mediterranean Meagre (*Argyrosomus regius*)” will be delivered in January 2009 reviewed for finalization in February 2009. Identification and preparation of another special study on a commodity other than seabass and seabream will be designed in June 2009.
  - d. Preparation of a draft regional synthesis and qualitative assessment of the Mediterranean Market on aquaculture based on the national reviews. The draft will include also a mid term strategic programme proposal for the development of marketing on aquaculture products (June 2009).
  - e. Organisation of the Meeting of the “Development of a Strategy for Marketing and Promotion of Mediterranean Aquaculture”. The basis for the establishment of a network of Mediterranean experts on marketing will be also defined (July-September 2009).
  - f. Preparation of the formulation of the second phase (2010) workplan and project, on the basis of the above draft mid-term strategy, including detailed indication on how to address the issue of image of aquaculture products (July-September 2009).

## Appendix I

**Support to the GFCM Working Group on Marketing on Aquaculture Products:  
Development of a Strategy for Marketing and Promotion of Mediterranean aquaculture**

**GFCM-CAQ  
Working Group on Marketing  
National Aquaculture Market Report**

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