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**GENERAL FISHERIES COMMISSION FOR
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**COMMISSION GÉNÉRALE DES PÊCHES
POUR LA MÉDITERRANÉE**



GENERAL FISHERIES COMMISSION FOR THE MEDITERRANEAN
COMMITTEE ON AQUACULTURE (CAQ)
Seventh Session
Rome, Italy 8-10 March 2011
Report of the meeting on marketing data scheme and data collection for sustainable aquaculture* St. George's Bay, Malta, 22nd November 2010

* Only in English

OPENING OF THE MEETING

1. The meeting on “Marketing data scheme and data collection for sustainable aquaculture” of the GFCM-CAQ Working Group on Marketing of Aquaculture Products (WGMA) was held in St. George’s Bay, Malta the 22nd of November 2010. The Meeting was attended by experts from Croatia, Cyprus, Italy, Malta, Morocco and Turkey, the coordinator of Information System for the Promotion of Aquaculture in the Mediterranean (SIPAM), and the Officers from GFCM Secretariat. The list of participants is attached as Appendix B.

2. Mr Ferit Rad, the Coordinator of the GFCM-CAQ Working Group on Marketing of Aquaculture (WGMA), welcomed the participants and opened the Meeting. Mr Fabio Massa, GFCM Aquaculture Officer and Technical Secretary of CAQ addressed the meeting and thanked the Maltese authorities for the kind hospitality and for excellent organisation of the meeting.

3. The chair recalled that the discussions during the meeting will focus on the main issues for identification of a strategy for collection and dissemination of market data and information to promote the development of economically sustainable aquaculture within GFCM area.

ADOPTION OF AGENDA AND ARRANGEMENT OF THE MEETING

4. The Agenda of the meeting was introduced and adopted. The adopted Agenda is attached in the Appendix A.

ACTIVITIES OF THE WORKING GROUP ON MARKETING OF AQUACULTURE PRODUCTS (MEDAQUAMARKET)

5. Mr Ferit Rad, the coordinator of the GFCM-CAQ Working Group on Marketing of Aquaculture (WGMA), delivered a presentation of the MedAquaMarket Project-“Support to the GFCM-CAQ Working Group on Marketing of Aquaculture Products: Development of a Strategy for Marketing and Promotion of Mediterranean Aquaculture”, formulated and conducted by Working Group on Marketing of Aquaculture Products (WGMA). The main outputs of the project including assessments and recommendations with respect to markets and market data collection were presented. During the presentation, the following assessments were underlined:

- The experience of MedAquaMarket project has clearly illustrated the problem of consistent and reliable data collection for the industry;
- The inability of the industry to adequately match its supply and demand is the single most important issue with regards to the markets;
- Information on consumption, consumers’ preferences and price trends are vital to planning production at the farm, company or national authority level;
- Access to current and updated information on market demand, consumption habits and demographics in target markets is a basic pre-condition to successfully growing the market for Mediterranean aquaculture products;
- What will determine the success or failure of a company in the future; is not so much its size but its ability to collect analyze and interpret information and respond accordingly.

6. The following recommendations with regard to markets and both market data and information collection were also emphasised:

- The only way to obtain commercially viable prices is to provide the market with what it wants in terms of quantity, form, quality and regularity of supply;
- Investment in information gathering and analysis of market conditions will allow for better production planning and a more market-oriented approach;
- Establish reliable data collection and disseminations systems on production volumes, consumption, distribution channels, market trends and trade information;
- Establish stabilizing measures such as the provision of timely production and market data, market studies to better understand the demand potential of consuming markets and the promotion tools to improve the image of Mediterranean aquaculture

7. Discussion went on and the positive results of the MedAquaMarket project were underlined. Participants reiterated their acknowledgements to the Spanish Government, donor of the project, which allowed and facilitated the achievements of the main goals of the project, namely the marketing aspects of the products of the Mediterranean finfish marine aquaculture.

8. The chair of the meeting informed the participants that due to *ad hoc* structure of the working group, several difficulties may be encountered in implementing the new workplan and activities of the working group in future. Participants agreed on the need to find a formal solution at CAQ level in order to continue working on priority issues for the sustainable development of Mediterranean aquaculture such as the priorities identified by the WGMA.

COLLECTION AND DISSEMINATION OF MARKET DATA THROUGH SIPAM IT

9. The Chair introduced this point of the agenda by underlining that the upcoming presentations were intended to focus on the progress made in the field of SIPAM IT together with some concrete proposals on market issues. Such proposals were about to be also presented during the 12th session of SIPAM for assessment and appraisal in order to be eventually incorporated the SIPAM system.

Market Portal in the SIPAM IT

10. The GFCM Secretariat illustrated the MedAquaMarket Project web section, within the SIPAM portal, which was designed and released on the web for public consultation. Such web section is composed by several sections, namely the home page (information about the project), Meetings and Reports (meetings information and related documents, presentations, photos, etc.), Publications, Data (Fish Market data, National Market Data and Demographic data represented through interactive charts) and Links. Some technological improvements on the SIPAM portal in general were also shown to the participants: the Issuu platform, new document-presentation platform which sensibly improves the fruition of the online PDF documentation, and Xcelsius, the software which allows the release of dynamic charts and table in flash format for a better consultation and consultation of the data.

Marketing data scheme (methodological aspects)

11. Market data and information scheme drafted by WGMA as a follow-up activity of Working Group (WG) for 2010 was presented and opened to discussions by Mr. Ferit Rad. The draft market data and information scheme was structured and organised in 9 categories namely Production, Input Usage, Industry Structure, Prices, Trade and Consumption, Demographic Data, Governance, Med-Aqua Directory and Secondary Information. Each category contained relevant sub-categories and tables/sections with a methodology sheet for each table/section. The scheme as adopted is in Appendix C.

Data sources and availability (methodological aspects)

12. All categories and associated tables/sections were discussed in depth from conceptual framework perspective, data source and availability as well as technical aspects. Some of the proposed data were found to be already available (Production data) or readily adaptable to present SIPAM databases. Some categories were regarded as totally new concepts and would require creation of new databases within SIPAM. The detailed tables are provided in Appendix C.

13. In light of discussions and assessments made by participants the following main categories (including associated sub-categories and tables/sections) were regarded as important and decided to be recommended to 11th Session of SIPAM to be considered for

inclusion in SIPAM databases: Production, Input Usage, Industry Structure, Prices, Trade and Consumption and Demographic Data.

AQUACULTURE PRODUCERS ORGANISATION PRODUCER ORGANISATIONS (POs) AND AQUACULTURE DATA COLLECTION

14. As a technical contribution to the meeting, the paper “Note on Aquaculture Producer Organisations”, was introduced by Federico De Rossi, from the GFCM Secretariat, and presented to the participants. The reports of 26th GFCM Session (September 2001) and 5th SAC Session (July 2002), together with the FAO Code of Conduct for Responsible Fisheries were recalled to underline that the participation of private sector in the activities was already promoted at sub-regional and regional level in the past. The conclusion on POs of the last GFCM-CAQ-WGMA MedAquaMarket meeting (October 2009) were reminded to participants to strength the potential role which POs may have in the data collection process. In the light of the above, and after a general overview of aquaculture POs, the idea of a survey on aquaculture producer organisations within the GFCM convention area was proposed with the aim of collecting information about the activities carried out by POs and their role in collecting data.

15. The discussion focused on the different aspects of Aquaculture Producer Organisations. It was underlined that although the same definition is adopted, several differences incurred at national level. The participants agreed that the term “producer organisation” should be considered for any kind of farmers’ organisation which is working for building the capacity of the farmers itself and which promotes actions for the economic sustainability of aquaculture. The meeting agreed that the relation of the WGMA with the Mediterranean aquaculture POs should be strengthened in order to improve the information, the market data analysis and assessment of marine aquaculture products.

CONCLUSION AND RECOMMENDATIONS

16. Participants reiterated the need for the collection and dissemination of market data/information as key factor for the development of sustainable aquaculture in the Mediterranean. The following conclusions and recommendations were made:

- The market data and information scheme proposed by WGMA should cover all farmed species groups (finfish, shellfish and others, excluding weeds) regardless of rearing environment (Freshwater, brackish or marine).
- The possibilities of having more frequent (monthly) price data should be taken into consideration and opened to discussion during 11th session of SIPAM.
- Inclusion of data on “production cost” figure (Simply Euro/kg) for main species farmed in proposed market data and information scheme could be also considered by SIPAM national coordinators.
- Preparation of a glossary of terms used in the proposed market data and information scheme would facilitate the collection of harmonised data. In this regard collaboration

with WG on Sustainability and opportunities of having market data and information terminology included in InDAM glossary should be evaluated.

- Based on outputs of MedAquaMarket project with regard to the need for establishing reliable market data collection and dissemination system, the creation of a permanent section in SIPAM network as “Market-IT” should be evaluated.

Workplan of the WGMA

17. As follow-up the work-plan of WG on Marketing of Aquaculture Products for 2011-2012 was presented and discussed in detail. It was decided to propose the following activities to the CAQ: One dealing with promotion and dissemination of responsible aquaculture practices to contribute to image building in Mediterranean aquaculture and the other focusing on an assessment of POs in GFCM region and the role PO's can play with regard to market promotion and stabilizing supply and prices patterns in Mediterranean aquaculture.

The presented workplan was based on two main outputs.

OUTPUT 1: The responsible aquaculture practices in the Mediterranean are promoted and disseminated in order to improve dialogue between farmers and society on the image of aquaculture.

Activity 1.1. Organisation of a workshop on Responsible Aquaculture Practices for Mediterranean based on the more recent and available guidelines and indicators for sustainable aquaculture.

Activity 1.2. Preparation of a project for improving the image of aquaculture production and products in Mediterranean including pilot actions, proposals to organize training/workshops on Responsible Aquaculture Practices with the cooperation of national authorities and POs.

OUTPUT 2: The role of Producers' Organizations in development of sustainable aquaculture in the Mediterranean is promoted and improved.

Activity 2.1 Preparation of a review of legislation and present status of POs in GFCM member countries and drafting recommendations for promoting the role of POs including issues related to supply and price stability.

Activity 2.2 Organisation of a workshop with the participation of POs to discuss and finalise the recommendations and with the aim of strengthening the cooperation among the CAQ Subsidiary bodies and the Mediterranean POs.

Appendix A**Agenda**

1. Opening and arrangements of the meeting
2. Adoption of the agenda
3. Activities of the Working Group on Marketing of Aquaculture Products (MedAquaMarket)
4. Collection and dissemination of market data through SIPAM IT
 - Market Portal in the SIPAM IT
 - Marketing data scheme (methodological aspects)
 - Data sources and availability (methodological aspects)
5. Aquaculture Producer Organisations (POs) and aquaculture data collection
6. Other matters
7. Conclusion and Recommendations

Appendix B

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Table 1 - Proposal for SIPAM market data & information scheme

CATEGORY	SUB-CATEGORY	TABLE / SECTION TITLE		DATA COLLECTION IMPLEMENTATION /SUPPORTED BY	STATUS OF DATA AVAILABILITY AND DATA ENTRY
PRODUCTION	Marketable Fish	1	Aquaculture/Capture Fisheries Production of Major Farmed Species in Volume (tonnes)	Aquaculture data Available in SIPAM Data Collection scheme - Fisheries data to be reported at National level	
		2	Aquaculture Production in Value (€, 000)	Available in SIPAM Data collection scheme	
	Hatchery Reared Juvenile	3	Hatchery Production in Volume (millions)	Available in SIPAM Data collection scheme	
	Fishmeal and Oil	4	Domestic Production of Fishmeal and Fish Oil (tonnes)	National Coordinators	New
	Feed	5	Domestic Production of Fish Feed (tonnes)	National Coordinators	New
INPUT USAGE	Hatchery Reared Juvenile	6	Apparent Domestic Fry Usage (millions)	National Coordinators	New
	Wild Juvenile	7	Harvest of Wild Fry (millions)	National Coordinators	New
	Feed	8	Apparent Domestic Consumption of Fish Feed	Automatically calculated	
INDUSTRY STRUCTURE	Production Capacity	9	Licensed and Actual Production of Major Farmed Species	Automatically calculated	
	Size of Enterprises	10	Breakdown of Company/Farm Production Size Categories for Major Species	Automatically calculated	
PRICE	Marketable Fish	11	Mean Prices for Major Farmed Species	Available in SIPAM Data collection scheme	
	Juvenile	12	Mean Prices of Major Hatchery Reared Fry/Juveniles	Available in SIPAM Data collection scheme	
	Feed	13	Feed prices for major farmed species	National Coordinators	New
	Fish Meal and Oil	14	Domestic Fishmeal and Fish Oil Prices	National Coordinators	New
TRADE and CONSUMPTION	Foregin Trade	15	Import and Export of Aquatic Products (Volume and Value)	National Coordinators	New
		16	Import and Export of Major Farmed Species (Volume and Value)	National Coordinators	New
		17	Main Export Destination For Farmed Species	National Coordinators	New
	Consumption	18	National Per Capita Consumption of Aquatic Products	National Coordinators	New
		19	Apparent Domestic and Per Capita Consumption of Major Farmed Species	Automatically calculated	
DEMOGRAPHIC DATA	Population	20	Population Size, Growth rate and Age Structure	GFCM Secretariat	New
		21	Average Household Size	GFCM Secretariat	New
		22	National Income Per Capita	GFCM Secretariat	New
	Income and Expenditure	23	Breakdown of Household Final Consumption Expenditure (% ,HFCE)	GFCM Secretariat	New
		24	Household Final Consumption Expenditure Per Capita (HFCE)	GFCM Secretariat	New

Table 2 - Additional data & information for SIPAM market scheme

CATEGORY	SUB-CATEGORY	TABLE / SECTION TITLE		DATA COLLECTION IMPLEMENTATION /SUPPORTED BY	STATUS OF DATA AVAILABILITY AND DATA ENTRY
GOVERNANCE	Market Access	1	Legislation on Seafood Safety and Quality	National Coordinators	New
		2	Labelling and Certification Schemes	National Coordinators	New
	Market Regulation	3	Legislation on Aquaculture Producers Organizations and Cooperatives	National Coordinators	New
	Public Authorities	4	Competent Authorities	National Coordinators	New
MED-AQUA DIRECTORY	Enterprises	5	List of Licensed farms	National Coordinators	New
		6	List of Licensed Processing Companies	National Coordinators	New
		7	List of Companies Involved in Certification Schemes	National Coordinators	New
		8	List of Companies Involved in Import and Export of Seafood	National Coordinators	New
		9	List of Farms Involved in Organic Aquaculture	National Coordinators	New
SECONDARY INFO	Publications	10	Existing Market Surveys/Publications on Demand-Supply Forecasts	National Coordinators	New
		11	Existing Publications on Consumers Preferences and Attitudes, seafood consumption patterns and expenditure per household	National Coordinators	New
	Links and Information Sources	12	Links to useful market information sources	National Coordinators	New