

**G**eneral  
**F**isheries  
**C**ommission for the  
**M**editerranean



[www.gfcm.org](http://www.gfcm.org)

*Committee on Aquaculture-CAQ  
Working Group on Marketing of Aquaculture Products*

**SURVEY ON  
AQUACULTURE FARMER ORGANIZATIONS  
IN GFCM MEMBER COUNTRIES**

**Preliminary Results**

**Ferit RAD**  
Coordinator of WGMA

*8th Session of the Committee of aquaculture  
13-15 March 2013- Paris*



## Background Information

Aquaculture farmer/producer organizations were among core elements of the market strategy proposed by MedAquaMarket project (Development of a strategy for marketing and promotion of Mediterranean aquaculture, GFCM Studies and Reviews, No.88, 2010) for development of sustainable aquaculture in GFCM member countries.

The strategic role of farmer organizations in the following domains has been emphasized by MedAquaMarket project:

- Collection and dissemination of market data and information to match supply to market demand both in terms of quantity and qualitative attributes and thus stabilizing market,
- Facilitating access of small and medium-sized enterprises to modern market chains and strengthening their negotiation power through concentration of supply,

## Background Information

- Promoting the image of Mediterranean (Inc. Black Sea) aquaculture by developing Code of Practices/Best Management Practices for responsible aquaculture and further development of collective quality norms and certification schemes,
- Facilitating well-structured advertising, continuous promotion, marketing and public service communication,
- Providing technical assistance/training for small- to medium-sized enterprises to increase their competitiveness and risk management capabilities.

The fundamental role of farmer organizations in promoting sustainable development of aquaculture in the Mediterranean and the Black Sea is also well acknowledged at GFCM Level.

## Background Information

Within this context a two-phase initiative focusing on assessing the current status of aquaculture farmer organizations in the GFCM member countries and further formulating recommendations for strengthening their role and capacities for development of sustainable aquaculture was endorsed as part of workplan of working group on marketing of aquaculture products (WGMA) for 2012-2013, during 5th Coordinating Meeting of Working Groups (March 2012, Rome)

## Objectives/Scope

**PHASE I:** aims to gain a clear understanding of status/structure of aquaculture farmer organizations in GFCM members countries and organizational and managerial constraints and challenges faced by these organizations. To this end an on-line questionnaire was constructed in collaboration with *Eurofish/SIPAM* to collect the data/information needed for basic assessments. The on-line questionnaire is active since November 2012 through GFCM-SIPAM website.

**PHASE II:** aims to generate recommendations for strengthening the organizational capacities and role of farmers' organizations for collective actions including marketing and market promotion. A workshop is intended to be organized in 2013 to discuss and formulate appropriate recommendation to this end.

# Phase I- Assessment (Online Questionnaire)



## Preliminary survey on Aquaculture Farmers Organizations

Assessment of the current situation of  
farmers/producer organizations in GFCM member  
countries

[www.faosipam.org](http://www.faosipam.org)

For purpose of this survey;

Aquaculture farmer organizations are:

*“Any formal membership organizations formed by aquaculture farmers/producers to promote their interests through advocacy, economic and/or technical services”.*

# Structure of the Questionnaire

1. General Information
2. Objectives and Functions of the Organization
3. Membership and Revenues
4. Target ed Farmer(s) Group(s)
5. Activities and Services of the Organization (Effectiveness)
6. Additional Activities and Services of the Organization
7. Indicators (Monitoring Development of the Sector)
8. Organizational and Managerial Constraints & Challenges
9. Recommendation/Solutions to Overcome Constraints & Challenges



# Preliminary Results

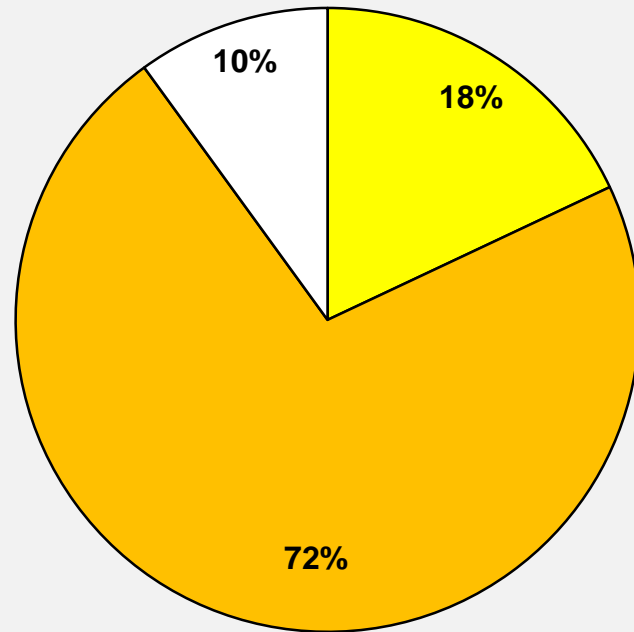
# Description of Preliminary Data set

No. of Responses (so far, February 2013): : 11

Country	Legal Status of the Organization (Typology)					
	Association	Cooperative	Federation	PO	Union	Others
Albania (1)			N			
Croatia (1)	N					
Greece (1)			N			
Italy (3)	N N	L				
Romania (1)	N					
Spain (2)	N L					
Turkey (2)	L				N	

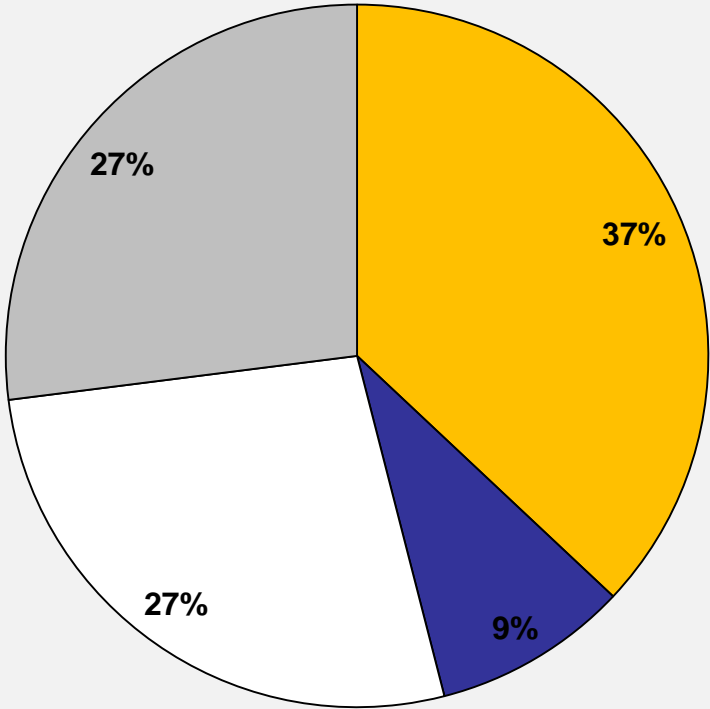
Geographic coverage: N= National, L=Local

# Objectives and Functions of the Organization



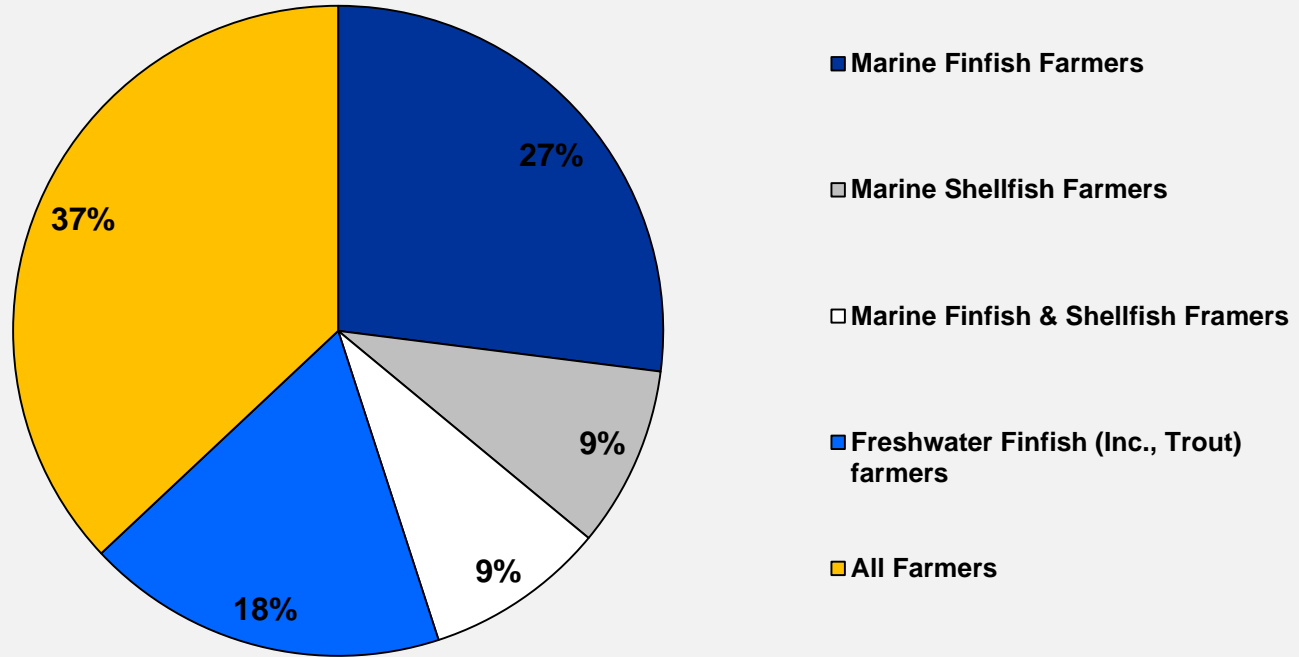
- Advocacy-Technical
- Multifunctional
- Advocacy

# Source of Revenues



- Membership fees
- Memebership fees & Services
- Membership fees & Public funding
- Membership fees & Public funding & Services

# Target Groups



<b>Activities &amp; Services of the Organization</b>	<b>Effectiveness (Mode Values)</b>
Lobbying and defending interest of members	3
Facilitating access of members to Input such as fry and feed	2
Facilitating access of members to loans and credits	2
Training and extension services for capacity building	2
Planning and coordinating production of members to regulate the market	2
Marketing and negotiating sale contracts for its members	2
Trade and intermediation	1
Promoting image of aquaculture products through effective communication with the society	2
Promoting veterinary services	2
Organizing market promotion activities and campaigns	2
Promoting collective actions towards responsible/better aquaculture practices and certification	2
Facilitating market access for members through collection and dissemination of market data /information and surveys	1
Providing product processing/value addition opportunities for products of members	1
Interfacing with applied research organizations to meet R&D needs of members	2
Providing assistance and guidance in establishing aquaculture farm activities	2
Channeling the supply and the marketing of members' products	2
Collecting of economic, first sales and production forecast information	1

1

2

3

Not Effective

Moderately Effective

Highly Effective

## Indicators (Monitoring Development of the Sector)

Only 2 (%18) organizations have internal monitoring system consisting of indicators to follow the development of the sector.

Indicators used:

- *Monitoring feed consumption by the sector*
- *Analysis of the production costs*

# Organizational & managerial Constraints

<b>Order</b>	<b>Constraint</b>
<b>1</b>	<b>Lack of enabling institutional environment/well-designed legislation</b>
<b>2</b>	<b>Insufficient support by public sector and decision-makers</b>
<b>3</b>	<b>Insufficient revenues/funding to fulfill foreseen functions</b>
<b>4</b>	<b>Lack of commitment and involvement by members</b>
<b>5</b>	<b>Difficulties in collective management and decision-making process</b>
<b>6</b>	<b>Financial sustainability of the organization</b>
<b>7</b>	<b>Lack of interest in membership by farmers</b>



# Organizational & managerial Constraints

## Further challenges expressed by FOs surveyed:

- **Difficulty in collecting membership fees**
- **Lack of professional approach in collective actions**

## Preliminary Assessments

The size of available data set established so far does not allow any comprehensive and definite assertion or assessments on status/structure and effectiveness of aquaculture farmer organizations in GFCM member countries. Below are just some preliminary assessments:

**Typology/Size:** Within responses received “Association” is so far the most common type of aquaculture farmer organization in GFCM member countries. Size of farmer organizations is very variable ranging from 19 to 907 members.

**Legislative Framework:** Even organizations with similar legal status e.g. “association” can function under different legal arrangements in different countries. For example while an association in Italy can plan/coordinate production of its members, such a function is not applicable for an association in Greece.

## Preliminary Assessments

**Target Farmer Group(s):** In countries with developed aquaculture industry (e.g. Greece, Spain and Turkey) farmer organizations tend to cluster according to species, species group or locality. Whereas in countries with less developed aquaculture sectors we come across very general organizations which even include fishermen.

**Activities & Services:** Most of the farmer organizations tend to be multifunctional providing advocacy, technical and economic services to their members. However; they are relatively more effective in lobbying and advocacy and much less effective in providing economic and specifically market and marketing related services. Areas where FOs activities/services are least effective and need to be promoted are:

- Trade and intermediation
- Collection and dissemination of data/information on economic aspects including markets/marketing
- Providing processing/value addition opportunities

## Concluding Remarks:

Farmer organizations are important tool and opportunity for improving governance and management of aquaculture sector through self-regulation and collective arrangements.

Farmer organizations are also a tool for small and medium-sized enterprises to integrate into modern supply chains and to meet their requirements for food safety standards, traceability and certifications. FOs would also facilitate market access and negotiation power of small and medium-sized enterprises through concentration of supply.

As far as aquaculture farmer organizations in GFCM member states are concerned and based on preliminary assessments made so far by the survey the following recommendations can be made:

## Concluding Remarks:

- The role of aquaculture farmer organizations in management of sustainable development of aquaculture sector should be well recognized by policy and decision-makers to formulate supportive policies and legal arrangements for empowering FOs.
- To meet the challenges and opportunities of modern supply chains for seafood, managerial capabilities of farmer organizations on market governance issues should be promoted.
- Cooperation between CAQ and farmers organizations (Farmers/producers) should be further promoted for first hand information on dynamics of the sector and formulation of proactive policies for sustainable development of Aquaculture within GFCM area.

I would finally like to ask for further support of member countries (CAQ and SIPAM focal points) for improving our data set on FOs by dissemination of the survey and facilitating feedbacks. Thank you.