GENERAL FISHERIES COMMISSION FOR THE MEDITERRANEAN

COMMISSION GÉNÉRALE DES PÊCHES POUR LA MÉDITERRANÉE

GENERAL FISHERIES COMMISSION FOR THE MEDITERRANEAN

COMMITTEE ON AQUACULTURE

WORKING GROUP ON MARKETING ON AQUACULTURE

REPORT OF THE WORKSHOP "DEVELOPMENT OF A STRATEGY FOR MARKETING AND PROMOTION OF MEDITERRANEAN AQUACULTURE" (*MEDAQUAMARKET*)

Tangier, Morocco 27-28 October 2009

OPENING AND ARRANGEMENTS OF THE MEETING

1. The Workshop on "Development of a strategy for marketing and promotion of Mediterranean Aquaculture" of the Working Group on Aquaculture Marketing (WGMA) was held from 29 to 30 October 2009 and was hosted by the Centre Regional de l'Institut National de Recherche Halieutique (INRH) Malabata – Tangier (Morocco). The meeting was attended by 30 Mediterranean experts namely from different institutions, fish farmers, academicians, and from administration. The Workshop was opened by Mr Abdellatif Orbi, Chef of the "Department de Oceanographie et Aquaculture" of the Institut National de Recherche Haleutique - INRH, he welcomed the participants and introduced the local authorities. Mr Abdellah Moustatir Director of Division of the Fisheries Department (DPNA) of Ministère des Pêches Maritimes of Morocco, welcomed the participants and behalf of Minister, he outlined the relevance of the fisheries sector in Morocco, the relevance of the sustainable fisheries and on the main aspects that now the fishery sector is facing. He underlined the strong interest of the Morocco in the development of the aquaculture activities and he wished a successful meeting..

2. Mr M'Hamed Idrissi, Director of the Regional Centre of the INRH of Tangier, after welcoming the participants, expressed his pleasure for hosting the meeting. He then informed on the main research activities of the institute and on the activities related to the aquaculture.

3. Mr Fabio Massa, from the GFCM Secretariat thanked the INRH for the excellent organisation and hospitality of the meeting. He recalled the relevance of the workshop within the framework of the activities of the Committee on Aquaculture and gave a general presentation of the activities of the subsidiary bodies of the CAQ within the programme of the GFCM. He then presented the main recent achievement of the Working Group on Siting and Carrying Capacity (WGSC) trough the

implementation of the project SHoCMed and of the Working Group Sustainability on Aquaculture (WGSA) trough the implementation of the project the InDAM. He recalled the relevance of the scientific cooperation on Mediterranean aquaculture among the different national research institutions in the context of the development of the sustainable aquaculture.

ADOPTION OF THE AGENDA

4. Mr Ferit Rad Coordinator of the Working Group on Marketing on Aquaculture, introduced the Agenda of the workshop that was adopted with minor change. He acted as chair of the meeting. The Agenda and the list of participants are attached to this report as Appendix A and Appendix B respectively.

PRESENTATION OF AD HOC WORKING GROUP ON MARKETING AND MEDAQUAMARKET PROJECT[1].

5. Mr Rad gave background information on establishment of Working Group on Marketing on Aquaculture and presented the MedAquaMarket "Development of a Strategy for Marketing and Promotion of Mediterranean Aquaculture", project funded by the Spanish Government (Secretaria General de Pesca, Ministerio de Agricultura, Pesca y Alimentación). MedAquaMarket project in this initial phase is centred in the Mediterranean basin and aims to increase the understanding of the present situation of marketing of marine aquaculture products in the Mediterranean and to identify a strategy for the development of the marketing of aquaculture products, in support to the solution of the main market problems that the Mediterranean aquaculture products is facing.

6. Furthermore the coordinator of WGMA illustrated some conceptual aspects of management and marketing and stressed that the evolution of aquaculture in the Mediterranean has been production oriented, producers focusing on cost efficiencies, scale economies and high production volumes while neglecting marketing and seeing it as only sales. He further emphasizes that with globalization the present trade and business environment is very complex and production oriented management model would fail to meet the challenges as rapid expansion of seafood trade, increasing power of retailers, standards for seafood handling and increasing expectations of consumers in terms of product quality, safety and convenience.

7. He also underlined that the Mediterranean aquaculture industry has to shift from sales to marketing and adapt a market-oriented management and proactive approach with focus on market demand, consumer's expectations and competitors. To this end MedAquaMarket project was initiated to provide some basic quantitative market data and qualitative assessments to formulate a strategy for marketing and promotion of aquaculture in the Mediterranean.

8. Finally he introduced the main outputs of MedAquaMarket project including; preparation of MedAquaMarket Aquaculture National Reports of the Mediterranean Countries based on the standard national market report template prepared by the WGAM and consequently the preparation of the report *"Regional Synthesis of the Mediterranean Aquaculture Sector & Development of a Strategy for Marketing and Promotion of Mediterranean Aquaculture"*. In addition a report prepared within MedAquaMarket project and titled "*Mediterranean Market for Emerging Species: Meagre (Argyrosomus regius) – Present Situation and Prospects*" was also introduced. Furthermore, the main components of the Market Data Scheme for inclusion within the SIPAM (Information System for the Promotion of Aquaculture) underlined.

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[1] MedAquaMarket Project "in "Support to the GFCM-CAQ Working Group on Marketing of Aquaculture Products: Development of a Strategy for Marketing and Promotion of Mediterranean Aquaculture" MTF/INT/943/MUL is operative since April 2008.. Project is funded by the Spanish Government (Secretaria General de Pesca, Ministerio de Agricultura, Pesca y Alimentación).

CURRENT SITUATION AND TREND IN MARINE AQUACULTURE IN GFCM REGION (MEDITERRANEAN AND THE BLACK SEA)

9. Mr Audun Lem of FIIU made a presentation on the state of aquaculture in the Black Sea focusing on the constraints which so far have hindered development. The production volumes in the countries bordering the Black Sea, with the notable exception of Turkey, are still much below the levels reached in the 1980s, although they have been growing again since 2000. Lack of market development and a low average consumption of fish, institutional weaknesses, geographical and ecological constraints, political and economic instability have all contributed to limit the sector's development. Lately however, not the least as a result of the modernization of the region's food distribution channels and a growing consumer interest in fish, policymakers and private sector investors have started to look to the sector with new interest.

10. He also highlighted that in particular, the accession of Bulgaria and Romania to the EU and the availability of EU funding for aquaculture development, have highlighted the potential of aquaculture production. He also noted that FAO does not have separate production statistics for the Black Sea but include the area within the Mediterranean Sea.

11. Ms Zouadi Chanez , from the "*Ministère de la Pêche et des des Ressources Halieutiques*" from Algeria, made a presentation of the National Aquaculture Market in Algeria and reported that the production in her country is represented by the farming of aquatic production in inland and in coastal area in marine and brackish water , as well as production of inland in dams, lakes and rivers.
She also reported that in Algeria at the moment the market production is not destined for export but only for the internal market. She described the commercial system of fisheries products in Algeria mainly based on the mussels, oysters and tilapia. The first two products are popular in the restaurants in the luxury hotels in which the producer sell directly to the part concerned. The market of tilapia is mainly located in the south and for which also the products are processed in different way for a better acceptance form the local population. The production of tilapia is mainly for the rural population and poverty alleviation. For what concern the marine aquaculture, she also informed that some projects are planned for farming European seabass and gilthead seabream, three projects for the production of juveniles and five projects for the production of marketable size. She remarket that the aquaculture production in Algeria is at the first steps and developing aquaculture fish farming for both marine and freshwater are considered as a new initiative to be developed.

PRESENTATION OF MAIN OUTPUTS OF MEDAQUAMARKET PROJECT

12. *Mediterranean Market for Emerging Species*. Mr Fabio Massa, presented the report titled "*Emerging Species of Mediterranean Aquaculture: MEAGRE (Argyrosomus regius) Market for Meagre Present Situation and Prospects"*, and made within the framework of MedAquaMarket and prepared by Ms Christine Monfort (consultant). He presented the situation of aquaculture production of Meagre in the Mediterranean sea that actually is cultivated at different scale in many countries (Italy, France, Spain, Greece, Turkey, Egypt, Croatia and Malta). The report highlights that there is a room for a market for the meagre and in particularly for local suppliers, at the moment the price of this specie is competitive. The meagre can be processed into fillets and loins and supply the growing segment for portion sized fish.

The document reports that farmed meagre is mainly sold fresh and few quantities are traded frozen. Little quantity is sold at size below 1 kg; over 50 percent is sold at size from 1 kg to 2 kg; a third at size above 2 kg. The bulk is sold whole head on, gutted or not depending on the final market. Smoked fillets and sushi in some restaurant have received good responses. Feed conversion ratio is expected to drop from 2.5 down to 0.9 to 1.2. Ex-farm price at EUR 2.5 to 3.0 per kg were mentioned by several players. The actual production in Mediterranean is about 5 000 t, and in consideration of the number of juveniles stocked actually in the Mediterranean farms, the production for the 2010 it is expected for more then 10.000 t.

13. Participants presented and discussed on the difference experience on the production of the Meagre in the Mediterranean and in particular in Spain, Morocco, Greece and Egypt. Experts from the industry and from the research institutions highlighted that the main problems encountered in the past for the production of meagre were the availability of juveniles and marketing of the final product. This last constraint was mainly due to lack of knowledge on markets of this product, that has different market of the European sea bass and gilthead seabream. However the participants stressed that despite that standard for the markets of meagre are not well defined and the small efforts carried out from the producers in order to develop the market in this moment are more competent than in the past and the meagre has its own market. The meagre is currently sold by the farm fresh and mainly is sold to the restoration. Farmers presented to the meeting reported that the meagre can have a size of 2 kg after only 15 moths and that are sold at Euro 2,5 until 7,5 per kg. The meagre is considered by the producers and by the experts an one of the best promising species for the diversification of production.

14. *Market Data Scheme for SIPAM Network*. Federico De Rossi (GFCM Data Management and Content Consultant) illustrated the advance made within the GFCM Secretariat in the preparation of the MedAquaMarket web portal, to be hosted in the SIPAM website. The system is aimed in giving useful information to the medium size companies with limited access to the information and in giving basic information to the different authorities in formulating production expansion plans, forecasting, and potential supply and demand.

15. He stressed that the system focus on the four components indicated in market data scheme for SIPAM prepared by WGMA and include: a) *Fish market,* an interactive system containing the main price of aquaculture products available on the web and accessible; b) *National Market Data*, a data base in which all the information collected for the preparation of MedAquaMarket National Report are stored, creating and integrate system with the common information submitted by the SIPAM National Coordinators. c) *Demographic data*, containing the main institutional information and d) *Other Relevant Data.*

16. *A Synthesis of Status of Aquaculture Marketing in GFCM Region (MedAquaMarket outputs).* Ms Lara Barazi, GFCM aquaculture marketing international consultant, presented the result of the analysis made within the activities of MedAquaMarket and included in the document *"Synthesis of the Mediterranean Aquaculture and Development of strategy for marketing and promotion of aquaculture (WGMA - MedAquaMarket)* " The document provide an overview of Mediterranean marine aquaculture industry and its market based on MedAquaMarket National Reports submitted by national expert on marketing and on aquaculture product and selected in the Mediterranean countries. She also informed that all the data submitted in the reports and from other source of information have been used and collated in order to allow for comparison across countries. Additional data were obtained through interviews of industry professionals, member of scientific and academic community and were also used for the finalisation of the document.

17. She presented the result of the data analysis included in the report by giving an overview of the production trend for the period 2003-2007 related both on the production on fingerlins and on growing . Comparison between the official and versus estimated data has demonstrated the problem of consistent and reliable data in the Mediterranean countries. In the document were also given information on the difference in the structure (system type and size of enterprise) of the marine aquaculture industry and analysis were made . Comparison were also given by country, system type and size of enterprise , as well as a comparison between the different costs of production that showed a difference depending on the size of the industry as well as on the countries .

18. Ms Barazi, also described the potentiality for further development of aquaculture based also on a forecast production. She stressed that it is essential for the industry to solve the two most significant problems and constraints to growth and that are specific to it in the Mediterranean Conflicts for limited space and Matching production to market demand, both in terms of quantities, species and price. Furthermore in the document the seafood markets and consumption are described and put in relation with the marketing aquaculture products and niche market. Furthremore as

conseguence of the vorious reccomendation indicated in the different MedAquaMarket national reports a series of strategic actions were indicated for the promotion of Mediterranean aquaculture, namely: on legal and institutional aspects; on the production and issues R&D and on the market aspects.

19. The meeting expressed its appreciation for the work made and its valuable content an considered that the data collected during the implementation of the MedAquaMarket project permitted to have an overview of the marine industry in the Mediterranean, and permitted also to analyse an assess the marine aquaculture production as well as in identify priorities for a marketing strategy for marine Mediterranean aquaculture.

MARKETS, MARKETING AND MEDITERRANEAN AQUACULTURE: STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS ANALYSIS

20. Ms Barazi presented the first results of a SWOT analysis for the Mediterranean industry as a whole that was made on the basis of the different MedAquaMarket National reports. Results were deeply discussed among the participants and were further developed and finalised by the participants focusing on markets and marketing issues applicable to all countries in the GFCM area for comprehensive qualitative assessments.

21. Environmental diversity and wide range of ecosystems in the Mediterranean, eating habits, high level per capita income in EU member countries and willingness of EU consumers to pay a premium for value-added products are among strengths which were underlined in discussions. The image of aquaculture products, lack of functional producers organizations (POs) and harmonized legislation on POs, lack of promotional activities, insufficient market data, weak data collection schemes, lack of harmonization of legislation on traceability and common minimum quality standards were some of weakness of Mediterranean aquaculture stressed by participants during the meeting. Lack of political will for development of aquaculture in some countries was underlined as the main threat for aquaculture in the Mediterranean region. It was further emphasised that antidumping by supermarkets and promotional sales harm the image of sea bass and sea bream on the long run. Promoting transparency in sanitary issues and product quality schemes, branding and certification schemes were seen as opportunity for Mediterranean aquaculture products. Organic aquaculture was also seen as an opportunity for small-scale farms to survive taking advantages of this niche market. However; organic farming was regarded as a controversial issue due to technical and legislative constraints and issues.

22. Results of SWOT analysis is presented in Appendix C to this reports.

DEVELOPMENT OF A STRATEGY FOR MARKETING AND PROMOTION OF MEDITERRANEAN AQUACULTURE (CONCLUSION AND RECOMMENDATION).

23. After a brainstorming and discussion on markets, marketing and promoting Mediterranean aquaculture, the main principles determined by Working Group on Sustainable Aquaculture-InDAM project for economic dimension of sustainable aquaculture in Mediterranean considered seen as a reference basic strategic framework for promoting markets, marketing and Mediterranean aquaculture. These principles include:

- Strengthening consumer responsive and market-oriented aquaculture
- Strengthening risk assessment and crisis management capabilities
- Strengthening financial management of enterprises
- Strengthening the role of Producers Organizations for Economic Sustainability of Aquaculture.

24. The workshop further adopted the main conclusion indicated in the report *"Synthesis of the Mediterranean Aquaculture and Development of strategy for marketing and promotion of aquaculture (WGMA - MedAquaMarket).* The result of the discussion as well as the detailed reccomendation are reported in the chapter 13 of the above metioned document and that, among other can be summarised as following:

- Participants agreed that aquaculture now is facing a series of constrains that limit any further development on sustainable marine aquaculture in the Mediterranean Sea and that are linked; to legal and institutional aspects; to the production and issues R&D and on the market aspects.
- Participants stressed the need to strengthen the existing legislation applying to the sector. The spatial planning of the coastal zones and the creation of efficient mechanisms to monitor production, distribution and consumption are of critical importance.
- Licence procedures should be facilitated and a legal framework should be established for and integrated spazial planning of aquaculture within the context of the integrated coastal management and in order to deal with the increased competition from other sea areas users, to ensure adequate space for the sector to develop and to attract potential investors and to increase the production quality;
- Producer's Organisations (POs) can play an important role on data collection, in promoting the stabilisation of the market, in facilitate the concentration of the offer and improve the standardize quality norms and collective certification schemes for small and medium sized enterprises. Legal framework should be established to encourage the establishment of Producers' Organizations for the aquaculture sector;
- Diversification of the production activities and protection of the environment still remain a priority for sustainable aquaculture and market development. Standards should be introduced for a better management of the aquaculture and for environmental protection and protection of the same aquaculture activities;
- Diversification of products, species, faming methods and processing should be supported in the countries; pasrticipants also stressed that diversification should be oriented also toward new market segment for the aquaculture, such the case of production of big sizes fishes for the restporants and for fish fillets .
- Incentives should be granted for Responsible Aquaculture Practices, collective certification schemes and well as on promotional activities;
- Educational and professional training should be promoted for fish framers and well as promote the development of use of risk assessment and management tools with regards to the disease prevention, cost/financial management, and production planning;
- Research should be encouraged on the modernisation of existing facilities and infrastructures in some countries
- R&D activities should be industry focused. The management of the public sector R&D funds should be improved, including a better coordination of the R&D activities of applied research, R&D should be encouraged to better feeds management and monitoring systems, Zoo sanitary monitoring network should be established;
- The absence of a marketing strategy of the sectors has been criticized. Price stability, exploitation of emerging niche market, public image of the sector and of the aquaculture products should be improved;
- Structured and continuous promotion and marketing communication strategy to selected target groups in order to increase the domestic consumption should be encouraged;
- Introduction and enforcement of a traceability systems. Encourage harmonisation of traceability systems (i.e. species and country origin); and the adoption of common minimum

standards in the GFCM region should be adopted in order to inform the consumers and to guarantee the production;

- Introduce certification and labelling systems and procedures in order to improve the competition,
- Better exploitation of existing and emerging markets and encourage the development of added value and processed products;
- Established a permanent data collection and systems and dissemination on consumption, distribution channels, market trends and trade information;
- Establishment of a permanent Mediterranean Price Observatory of marine aquaculture for the Mediterranean Sea.
- Consumer's awareness on attributes of aquaculture products should be promoted to improve consumption and image of farmed products.
- Within the context of species diversification for Mediterranean aquaculture "Meagre" should be seen as "Mediterranean Salmon" and farming of this species should be promoted in the GFCM region.

25. Data collection schemes and information networks, functionality of producer's organizations and image of aquaculture were considered to be among the main issues which need to be improved to promote markets, marketing and sustainable aquaculture in the GFCM region.

The following main activities should be considered for the Workplan of 2010 of the Working Group on Marketing of Aquaculture Products:

- *Data collection on markets and marketing*.
  The data collection on marketing will continue to be updated within the WGMA and will be made in cooperation and with the support of the SIPAM system. The data collection should be also based on the network established during the data collection of MedAquaMarket and with the cooperation and support of the industry;

- *Improvement of the MedAquaMarket data bank*
  Based on the scheme prepared for MedAquaMarket data bank *hosted* in the SIPAM website will be finalised and improved.

- *Extending MedAquaMarket Project into Black Sea Countries*
  Based on the scheme adopted in the preparation of the document *Synthesis of the Mediterranean Aquaculture and Development of strategy for marketing and promotion of aquaculture (WGMA - MedAquaMarket),* project will be extended also to the Black Sea countries and for those for which collecting data on marketing was not possible;

- *Organization of Meeting/s on marketing data collection in aquaculture*
  Organise a transversal meeting in cooperation with the SIPAM on marketing data collection and on analysis of information on "source and accessibility of socio-economic data on aquaculture.

- *Preparation of a project on promoting the image of aquaculture*
  A project proposal for improving the image of marine aquaculture product in the Mediterranean will be prepared

- *Preparation of a project on Meagre farming in the GFCM region*
  To promote sustainable development of meagre farming in the Mediterranean, a series of workshops on bio-technical aspects and marketing issues could be organized.

- *Preparation of a programme for the implementation and /or establishment of a* Price Observatory of Aquaculture for the Mediterranean Sea

- *Concerted actions to promote collective certification schemes*
  A series of actions should be taken to promote certification schemes among small and medium-sized farms which lack the financial means and technical capabilities.

26. The above activities will be carried out on the basis of the budget availability.

APPENDIX A

AGENDA

Opening and arrangements of the meeting

Adoption of the Agenda

Presentation of Ad Hoc Working Group on Marketing and MedAquaMarket Project.

Current situation and trend in marine aquaculture in GFCM region (Mediterranean and Black Sea)

Presentation of Main outputs of MedAquaMarket Project

Markets, Marketing and Mediterranean Aquaculture: Strengths, Weaknesses, Opportunities and Threats Analysis

Development of a Strategy for Marketing and Promotion of Mediterranean Aquaculture (CONCLUSION AND RECOMMENDATION

APPENDIX B

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APPENDIX 3

SWOT ANALYSIS FOR THE MEDITERRANEAN INDUSTRY

Strengths	Weaknesses
• Availability of suitable areas for aquaculture development	• Lack of cooperation between producers and research centres / institutes.
• Favourable environmental conditions	• Lack of cooperation amongst producers for promotional activities
• Know-how as to basic technical methods	• Low level of collective action.
• Access to high-level research in national aquaculture research centres and institutes in the Mediterranean	• Development based on production oriented management
• Proximity to major international markets (EU countries)	• Actual production volumes higher than officially claimed (not allowing for a pragmatic evaluation of the industry) in most countries
• High rate of product intrusion to large retailers (supermarkets in EU countries)	• Unregulated production and trade
• Acceptance of the industry's products in the catering sector (EU countries)	• Inefficient mechanisms to control product supply and price reductions
• Controlled production process with the ability to provide uniform sizes and quantities throughout the year.	• Relatively small number of markets (and segments) targeted.
• Quality control and quality assurance	• Fragmentation of the commercialisation agents.
• Assurance of food safety and controls.	• Low level of species diversification
• Uniform quality of aquaculture products.	• Low level of product type differentiation
• High level of per capita consumption of fish in the major markets (EU countries)	• Delicate (perishable) nature of products
• General perception of fish as a healthy food.	• Lack of market and consumer information for domestic and foreign market markets
• Ongoing research for the production of new species	• Lack of efficient marketing management strategies
• Innovative sector	• Overall lack of a strategic plan for the sector's development
	• Unsystematic and non-coordinated R & D efforts for the commercial exploitation of more species by the producers
	• Big difference between the first sale price and the final price to consumers.
	• Small number of certified products (specific labels, geographic denominations, etc).
	• Lack of a unified and consistent National policy for aquaculture
	• Onerous bureaucracy and often complicated and lengthy licensing procedure
	• Unclear, overlapping and decentralized legislation
	• Competition for space with other coastal users
	• No organized spatial planning of coastal zones
	• Onerous environmental regulation often with little scientific validation
	• Lack of comprehensive environmental data
	• Lack of communication between stakeholders, industry and public institutions
	• Not enough stakeholder/industry consultation and participation during decision-making processes
	• Lack of management and production planning in smaller companies

Opportunities	Threats
• State financial support. • Development of various quality certification and labelling schemes • Globalisation of the markets (closer to global customer) • Improvements in transport logistics • Wider acceptance of 'cultured' seafood • Increasing per capita consumption of seafood • Increasing demand for products of aquaculture in domestic and international markets. • Emergence of high-performance large-scale distributors and retailers Increasing share of large retailers in seafood trade Increasing consumption of seafood in urban areas (largely supplied by large retailers) Stimulation of purchase and consumption through carefully planned marketing actions Promotability of the 'Mediterranean diet' to which seafood -mainly in its fresh form- is a major constituent. Volumes of capture fisheries landings stabilised or on decline. Good perspectives for the diversification of aquaculture species. A clear priority for improving the quality of the aquaculture products. Appropriate integration in the natural environment, opening the way for making aquaculture a sustainable activity. Internationalisation of companies and their increase of competitiveness. Development of new commercial presentations (new product forms) and increasing added-value through processing Development of new technologies for the production of new species Development of new offshore and recirculation technologies Identification of new markets (Middle East, US and Asia) Strengthening of the mechanisms for improving the construction of prices. Use of collective actions to regulate supply Development of sustainable aquaculture Implementation of environmental monitoring and protection systems	• Globalisation of the markets (increased domestic and international competition) • Competition from other type of 'protein' food products. • Inability to expand and to exploit new markets • Directly and/or indirectly related food 'scares' • Negative publicity by mass media (bad press) • Strong negative perceptions towards fish (mainly related to preparation and cooking) • Oversupply of the domestic and international markets and price crashes • Cyclicality of the industry • Low prices of aquaculture products. Further compression of prices and profit margins • Further concentration of demand by large distributors and retailers. • Failure of company debt-refinancing • Too long waiting periods for obtaining licenses, authorisations and concessions. • Low profitability that hinders the investment in R&D • Expensive taxes on the use harbours, water, etc. • Uncertainty on the fulfilment of all the new environmental requisites. • Increasing fish health risks. • Disconnection between the price paid by consumers and first sale prices. • High cost of environmental monitoring and protection systems • Decreasing supply (Increasing competition for the supply) of fish meal and fish oil • Lack of appropriate and cost effective replacements for fish meal and fish oil