



GENERAL FISHERIES COMMISSION
FOR THE MEDITERRANEAN
COMMISSION GÉNÉRALE DES
PÊCHES POUR LA MÉDITERRANÉE



COMMITTEE ON AQUACULTURE

GFCM-CAQ Workshop on Seabass and Seabream Markets

FAO, Rome, 12 May 2006

DRAFT SUMMARY REPORT

Executive summary

1. As a follow-up to recommendations from the General Fisheries Commission for the Mediterranean (GFCM) Committee on Aquaculture (CAQ), GFCM and FAO convened a workshop on seabass and seabream markets held in Rome on May 12, 2006. In preparation for the workshop, a marketing study was commissioned and made available to the workshop participants along with a number of other relevant background documents. The objectives of the workshop were: 1) to reach a common understanding of the present status and trends in seabass and seabream markets; 2) to identify constraints to further sectoral development in GFCM Member countries; 3) to elaborate recommendations for the CAQ to deal with these constraints.

2. A consensus was reached on the present state of the seabass and seabream market, concluding that it has become very competitive with concrete threats of saturation in some specific markets. However, opportunities for market growth exist in both Southern Mediterranean and Northern European countries, as well as for niche products.

3. During the discussions a number of constraints on sectoral development were identified, in particular the lack of institutional support and inadequate aquaculture legislation. Six recommendations were developed to be presented and discussed at the Fifth session of CAQ (5–7 June 2006, Santiago de Compostela, Spain).

4. The 16 workshop participants included invited experts in their personal capacity, representing seabass and seabream producers in the Northern and Southern Mediterranean, industry experts, policy makers, the SIPAM network, the European Commission and academia, as well as FAO and GFCM staff.

5. The workshop prospectus including the agenda, list of participants and the marketing report are included in appendix. Documents made available for participants as background documents are available at: <http://www.globefish.org/dynamisk.php4?id=2790>.

6. This brief summary report was prepared by Dr Audun Lem, Fishery Industries Division, FAO, in his capacity as the workshop technical secretary. It is neither a consensus document nor fully comprehensive. It seeks instead to review the main issues raised and suggestions made by participants.

WORKSHOP CONSENSUS AND RECOMMENDATIONS

CONSENSUS ON MARKET SITUATION

The seabass and seabream market is very competitive. Saturation is a concrete threat in some markets, especially those for small/medium sized whole products (portion size) in Southern Europe. Opportunities for expansion exist in Northern Europe and in Southern Mediterranean countries. Further opportunities exist for bigger sizes and for gutted fish. Value can be added through improved marketing, use of labelling, development of niche products such as organic fish and possibly fillets and other more value-added products.

RECOMMENDATIONS

Recommendation 1: CAQ should look closely at national production and demand trends to identify the markets and product types that are growing, as currently available data are incomplete.

GFCM/CAQ should commission a study on statistical compilation of production and trade data within the region with the view to identify sources of discrepancies between the export and import data of seabass and seabream, as well as to verify whether quantities are being classified as “non-identified” species. GFCM countries should improve the compilation of production data including those on hatchery and feed production and carry out analysis of markets and trade of seabass and seabream products (sizes, qualities, process, products, etc.).

Governments should be encouraged to improve the methodology for compilation and quality of data collected from the industry on production (including hatcheries) and sales including making reporting part of the licensing conditions.

Recommendation 2: Marketing actions should be encouraged, in particular generic promotion of Mediterranean bass-bream, but without abandoning national/private campaigns. The promotion of domestic markets should also be increased.

Recommendation 3: Public financial support should aim to reduce negative environmental impacts and to improve food safety and product quality.

Recommendation 4: Research into new species development should be continued focusing on species that offer good market perspectives.

Recommendation 5: Countries should create a clear legal framework for aquaculture to encourage and protect sector investments. If needed, non-EU countries should be given technical assistance to upgrade their institutional capacity on food safety/quality issues, including their regulatory framework and relevant infrastructure to facilitate exports to EU and other markets.

Recommendation 6: Market and cost analysis studies, benchmarking and comparison with relevant successful examples in aquaculture are required in order to promote the development of a sustainable aquaculture sector. Analysis should include costs, species, technologies, geographical and environmental characteristics of production sites, education and availability of human resources, legislation, investment, taxation of sector and relations with other coastal activities.

Appendix 1:**Agenda**

09:00	Welcome Grimur Valdimarsson, Director, Fishery Industries Division Salem Hadj Ali, SIPAM Regional Coordinator
09:15-09:30	Presentation of participants
09:30-11:15	Presentation of report and documentation provided (Marie Christine Monfort/Audun Lem) Discussion of current state of seabass and seabream market Discussion of findings
11:15-12:30	Identification of current constraints in market and in aquaculture development in GFCM region
12:30-13:30	<i>Lunch break</i>
13:30-16:00	Elaboration of concrete strategies to overcome constraints
16:00-16:30	Conclusions and follow-up
16:30-17:00	Closure

Workshop background

During the Fourth session of the General Fisheries Commission for the Mediterranean (GFCM) Committee on Aquaculture (CAQ) held in Alexandria, Egypt (7–9 June 2004) the delegates addressed the constraints on further development of the aquaculture sector in the region. Among these were market concerns including competition, prices, uncertain demand for products, and issues related to marketing in light of adverse publicity, environmental concerns and competition from other activities for coastal sites.

The need for more information and analysis concerning demand and marketing of aquaculture products was highlighted. FAO has therefore commissioned a review document which looks into marketing issues covering the whole GFCM region with the particular focus on European seabass (*Dicentrarchus labrax*) and Gilthead seabream (*Sparus aurata*), the two major species cultured in the Mediterranean Sea. This review paper also includes other major commercial species and can serve as input to the GFCM Member countries in their planning for the development of aquaculture in the region in view of the present market characteristics and conditions.

Some tentative questions

At the Workshop a series of questions will be raised that will require discussion among the experts. Some tentative questions are listed below:

- What is the current state of the bass and bream market?

- Does it make financial and commercial sense to focus investments in additional seabass/seabream farming in the southern Mediterranean if the domestic markets are not developed and potential export markets maturing?
- How can the southern Mediterranean countries become competitive for aquaculture exports to the EU?
- What lessons can be drawn from Egypt's enormous growth in aquaculture production over the last decade?
- What are the current constraints in the GFCM countries that must be overcome in order to build a commercially and environmentally sound aquaculture industry?
- How can domestic markets for aquaculture products be developed in the GFCM countries?

Expected workshop outcome

Based on the documentation and reports made available by the Secretariat in combination with the experience of participants and workshop discussions, it is expected that a series of recommendations will be developed on the following issues:

1. identification of current constraints in the GFCM countries on market and production development; and
2. suggestions on possible strategies to overcome these constraints.

The recommendations will be presented for further discussion and possible adoption at the Fifth session of CAQ that will be held in Santiago de Compostela, Spain, from 5 to 7 June 2006.

Documents provided

1. Markets and marketing of aquaculture finfish in Europe – focus on the Mediterranean Basin (Monfort, 2006)
2. FAO regional aquaculture review for the Near East and North Africa Region (Poynton/Lovatelli, 2006)
3. Fish supply and demand in the Near East Region, GRP 83 (Feidi, 2006)
4. Study of the market for aquaculture produced seabass and seabream species [report to the EC] (University of Stirling, 2004)
5. Hidden harvests – unlocking the potential of aquaculture in Africa [Fish for All] (Muir, Gitonga, Omar, Pouomogne & Radwan, 2005)
6. What we have learned from fish farming and how we can apply this for future development (Myrseth, 2005)
7. Aquaculture in Egypt: a fragile colossus? (Sadek, Osman & Mezayen, 2006)
8. World market of Tilapia, GRP 79 (Josupeit, 2005)
9. Freshwater fish for European markets, GRP 82 (Tribiloustova, 2005)
10. Markets for Nile perch (Josupeit, 2006)
11. Main constraints of Aquaculture in Morocco (Massik, 2006)

12. Strengthening Egyptian fish production: International perspectives (Egypt/WorldFish Center, 2005)
13. El Mercado de lubina y dorada en la UE en el periodo 2003-2006 (Sotorrío, Polanco, Laxe, 2004)

Confirmed participants

- Bernardo BASURCO, CIHEAM-IAMZ, Spain, Workshop Chair
- Alain BONZON, Executive Secretary, GFCM
- Ramazan CELEBÍ, National SIPAM Coordinator/Ministry of Agriculture, Turkey
- (Ms) Maria COZZOLINO, IREPA, Italy
- Karim GARNAOUI, L'Aquaculture Tunisienne, Tunisia
- Salem HADJ ALI, SIPAM Regional Coordinator, Tunisia
- Audun LEM, Fishery Industries Division, FAO, Technical Secretary of Workshop
- Alessandro LOVATELLI, FAO Fishery Resource Division, CAQ Technical Secretary
- (Ms) Zakia MASSIK, Morocco
- (Ms) Marie Christine MONFORT, Consultant, France
- Björn MYRSETH, Marine Farms, Norway
- Alessandro PICCIOLI, European Commission
- Alberto RAMIREZ, Programme Director, Fundación Chile