



First "Regional Symposium on Sustainable Small-Scale Fisheries in the
Mediterranean and Black Sea"
Malta, St. Julians, 27 - 30 November 2013

SESSION IV: ENHANCING SMALL-SCALE FISHERIES VALUE CHAINS IN THE MEDITERRANEAN AND BLACK SEA

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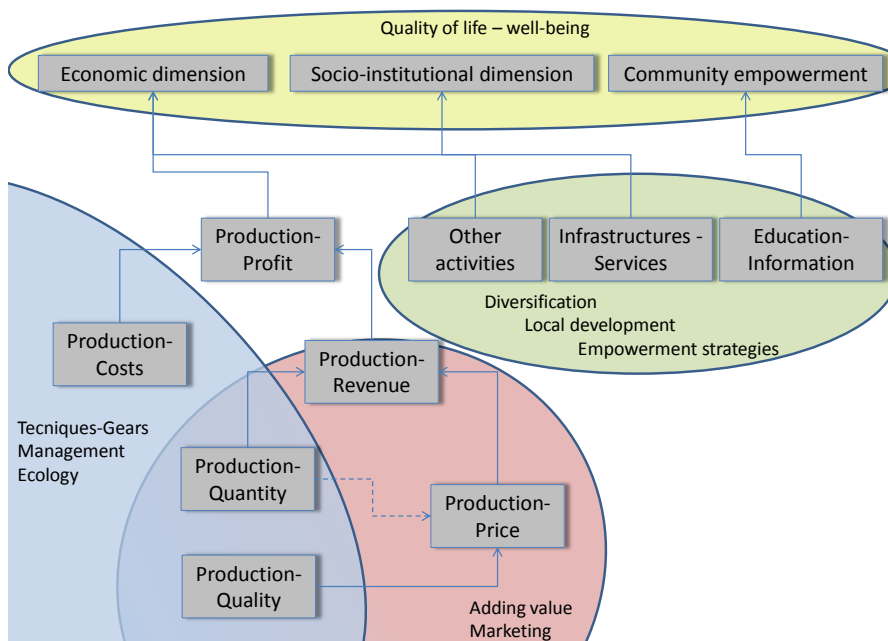
SMALL-SCALE FISHERIES KEY FACTORS (1)

- SSFs fleets in Middle Eastern and North African countries are weakly *growing*
- In EU SSFs fleet is *decreasing* (-23% last decade) and it has a marginal impact on the local economy
- Everywhere they are strongly anchored in *local communities*, reflecting historic links to adjacent fishery resources, traditions and values, and supporting social cohesion
- Low concentration of the landings and market and supply chain fragmentation

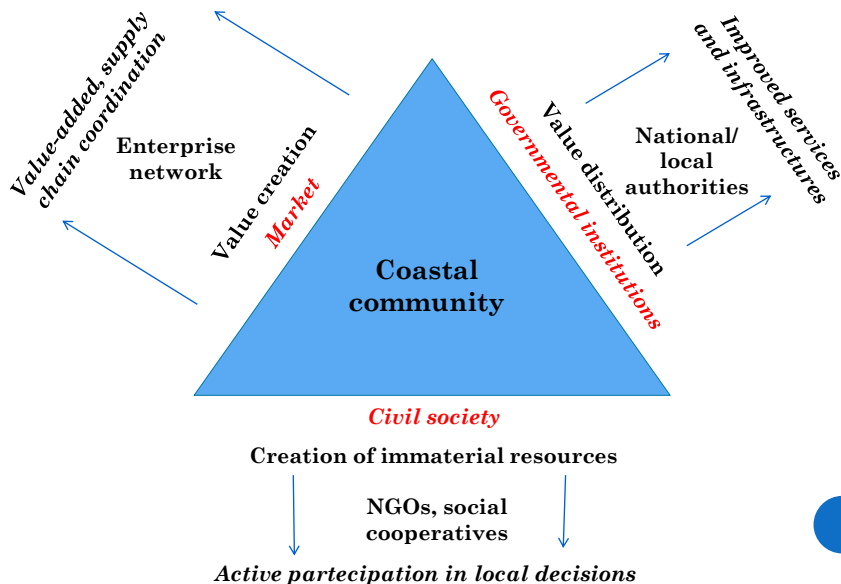
SMALL-SCALE FISHERIES KEY FACTORS (2)

- In EU the GVA per employed is 18% compared to average GDP per person, affecting a high level of part time employment and lack of recruitment
- Mediterranean SSFs have a multispecies character (8-10 species) compared to northern EU SSFs (2-3)
- Small-scale fisheries generally attain higher quality and *sometimes* higher prices than large-scale fisheries
- Knowledge and information are still limited, especially in non-EU countries

THE WELL BEING OF FISHING COMMUNITIES



INTEGRATED ACTIONS FOR COMMUNITY WELL-BEING: A MULTIDIMENSIONAL APPROACH



FUNCTIONS OF FISHERIES: TRADABLE AND NON-TRADABLE

- **Food production:** this function clearly concerns a tradable commodity but also entails non-trade aspects such as quality products and food security and safety.
- **Environmental functions:** small-scale fisheries are linked to positive externalities (or reduced negative externalities) on environmental issues.
- **Coastal/maritime functions:** small-scale fisheries allow the monitoring of the sea, preserve cultural traditions and synergy with activities of maritime and coastal economy.
- **Social functions:** it concerns impacts that help improving the local quality of life in coastal communities, including employment and reduced emigration rates.

A new model for fisheries in Mediterranean and Black Sea



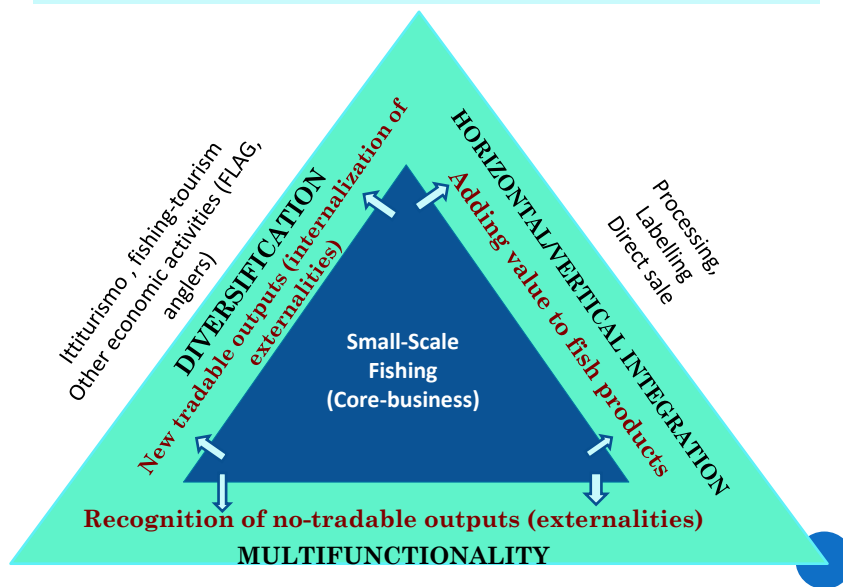
New multifunctional fishing entrepreneur figure:

from good producer... to (also) service provider

TRADABLE AND NON-TRADABLE FUNCTIONS



STRATEGIES FOR FISHERMEN



Contrats Bleus: compensation for adoption of more sustainable fishing practices; environmental protection

LABELLING STRATEGIES

Advantages:

- Identification of origin/producers of a fisheries,
- Links product/territory
- Simplifies the decision-making process upstream and downstream supply chain
- Reduces health and commercial risks for the consumer
- Ensures competitive advantages for the enterprise through the differentiation and recognition of the product

Disadvantages

- ❑ Lengthy of procedures
- ❑ Not always response to market demand
- ❑ Sometime imposed top-down
- ❑ Possible regulatory restriction on origin statements
- ❑ High commitments requested to invest in quality standards related to strategic behaviour of fisheries operators
- ❑ High communication expenditures

BENCHMARK EXPERIENCES



Cornish sardine



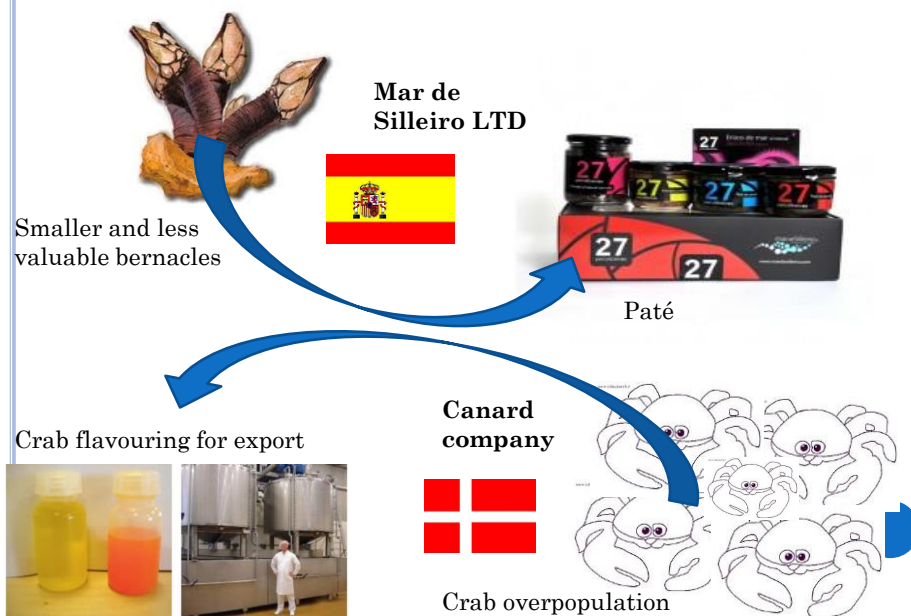
Bar de ligne de la Pointe de Bretagne



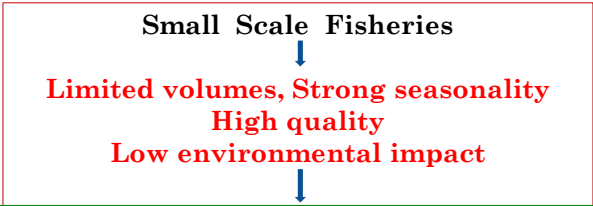
PRODUCT DIFFERENTIATION STRATEGIES

- Value adding by internalization of the supply chain stage
- Elimination of certain disadvantages of the fresh products (smell, perishability, etc.) by processing
- Increasing access to new market
- Promotion of minor species to consumer knowledge
- Increased variety of supply and respect of seasonality of fresh products
- Recovery of food tradition and maintenance of culture of local coastal system

BENCHMARK EXPERIENCES



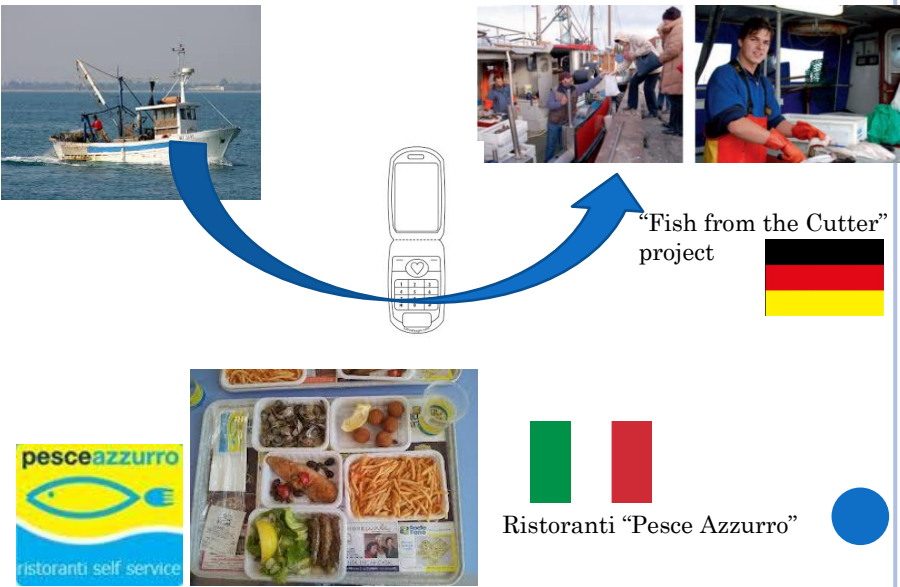
DISTRIBUTION CHANNEL STRATEGIES



Channels out of ordinary market (Direct sales - Short channels)

Advantage	Disadvantage
<ul style="list-style-type: none">• Direct contact with consumers and therefore control over information and knowledge of the market• Higher price• Higher profit margins• Better control over communication	<ul style="list-style-type: none">○ Investment in time○ Investment in equipment (transport, storage, quality issues)○ Health constraints○ Need to offer a diversified, regular range○ Variation in local regulations○ Conflicts of interest possible with those down-stream in the chain

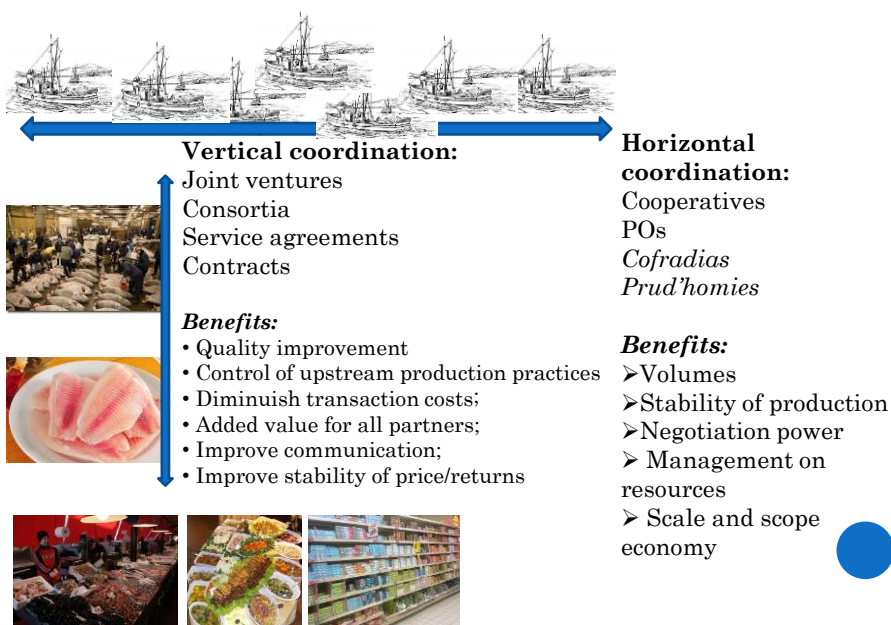
BANCHMARK EXPERIENCES



SUPPLY CHAIN ORGANIZATION

- Performance of supply chain needs financial and non financial (environment, social, technical, food safety) tools
- Performance of fishery supply chain is difficult to assess, it depends on some specific aspects: perishability, long distribution channel, seasonality, product standadization;
- Qualitative performance indicators such as consumer acceptance of the product needs to be taken in consideration;
- It complies with more strict regulations and laws regarding food production;
- It requires a technical and economic commitment by the actors at different stages
- For small-holders it could allow the emergence of opportunities from a silent demand-driven changes in high-value fisheries;
- It meets increasing consumer satisfaction.

HORIZONTAL AND VERTICAL COORDINATION



CONCLUSION

In the Mediterranean and Black Sea, coastal areas appear very different but common recommendations could be found to enhance fishery supply chain:

- 1) Incentive the environment for coordination in the supply chain and market through the strengthening role of new model of professional organization for the ownership of role of fishermen and decision to be taken at local and national level
- 2) Facilities tools and network could be envisaged to acquire information and share policies on multifunctionality, diversification and market cooperation to assist decision makers in the finalization of strategies at the country level.
- 3) Professional and academic training on sustainable socio-economic actions should be envisaged and targeted on the territorial potentialities.
- 4) Apply new strategies of marketing tools on labeling, differentiation and quality to meet consumer attitude and needs.