

Regional Aquaculture Conference 2014

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Blue Growth in the Mediterranean and the Black Sea:
Developing Sustainable Aquaculture for Food Security

Panel 3 Boosting markets for aquaculture

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del Consiglio
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Food and Agriculture
Organization of the
United Nations

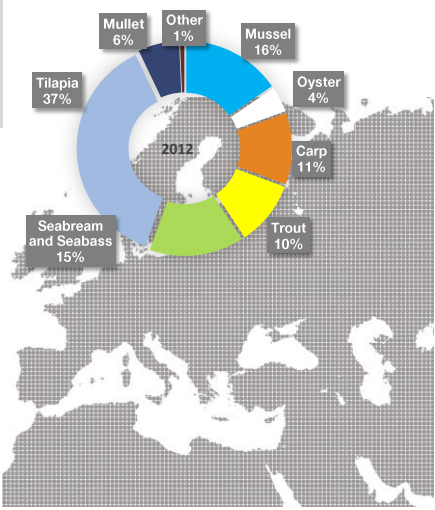
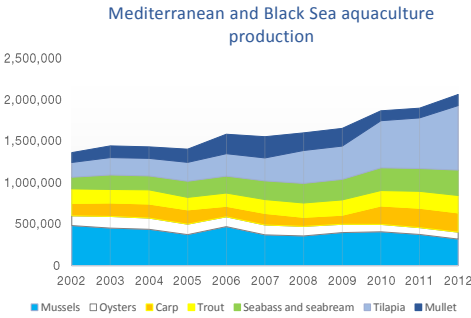


The Mediterranean and the Black Sea aquaculture sector

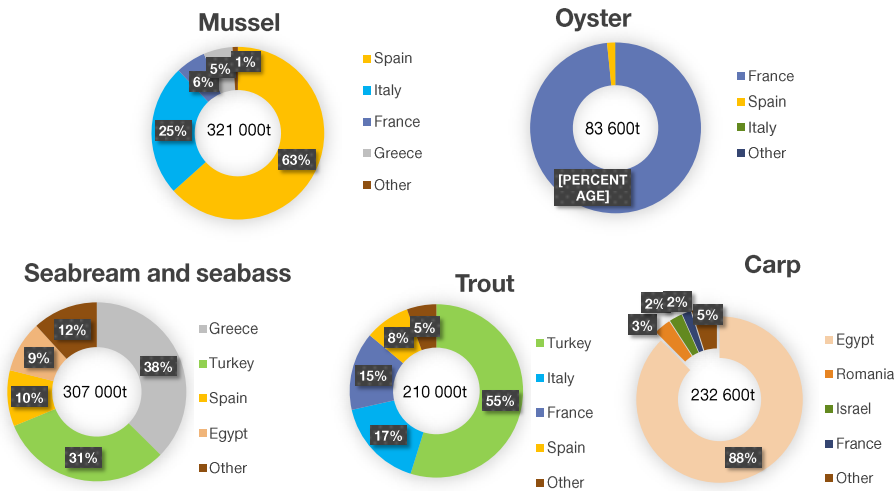


Current state of the Mediterranean and the Black Sea aquaculture sector

- Growth over 50% in the past decade,
- Surpassing 2 million tonnes in 2012,
- Growth facilitated by geographical factors, new technology, diversification of species, trade and proximity to the markets.

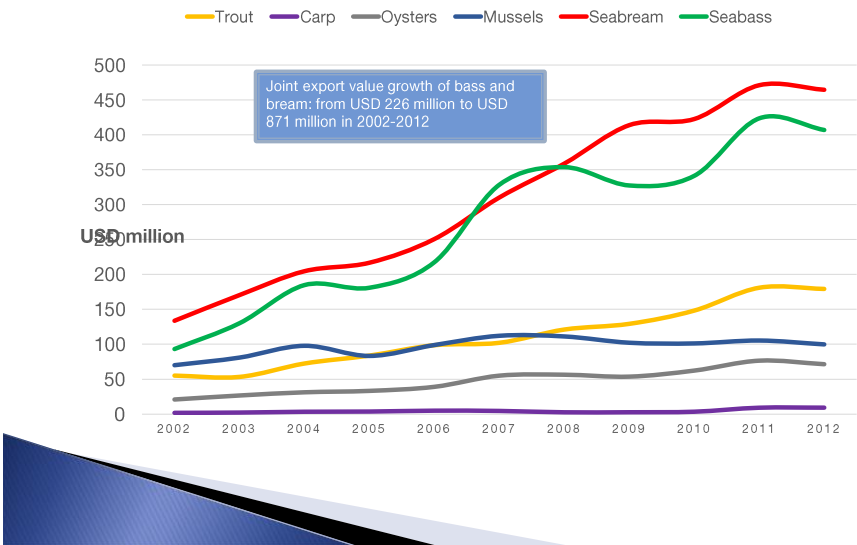


Farmed species by producing countries



Aquaculture trade in the region

Development of export value of the aquaculture products from the region



Trade of bivalves in the region



Trade of seabass and seabream



Trade of carp and trout



Main markets in the region

Apparent per capita consumption of the Mediterranean and the Black Sea farmed species



Mussel

- Spain: 3.7 kg
- Italy: 1.9 kg



Oyster

- France: nearly 2 kg



Seabass and seabream

- Greece: 2.9 kg
- Turkey: 1 kg
- Italy: 1 kg
- Spain: 0.7 kg



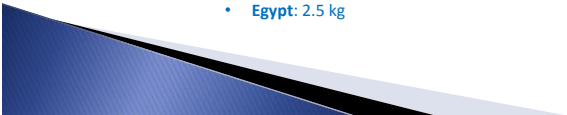
Carp

- Egypt: 2.5 kg



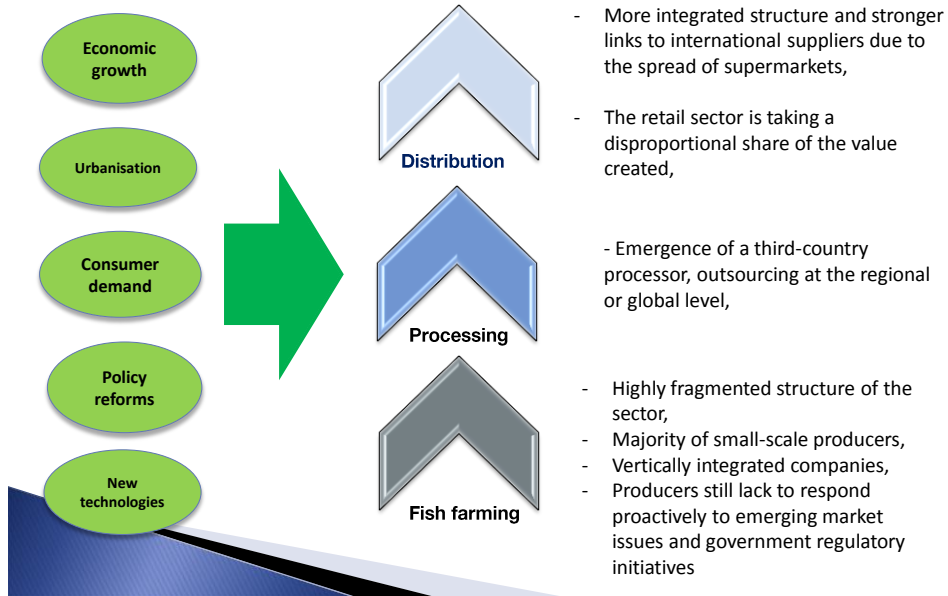
Trout

- Turkey: 1 kg
- Italy: 0.5 kg
- France: 0.4 kg

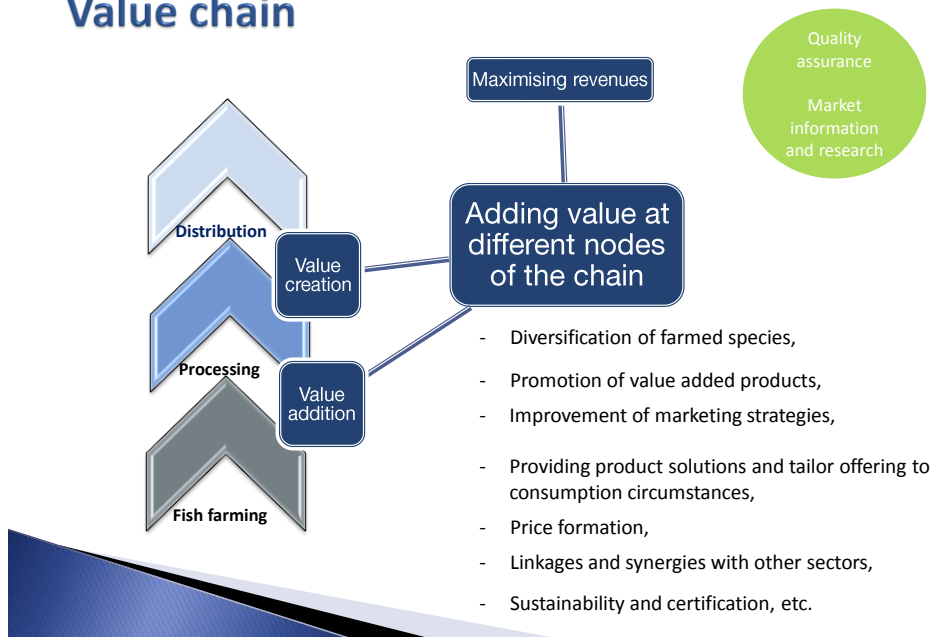


Value chain and regulatory framework of the region's aquaculture sector

Supply chain

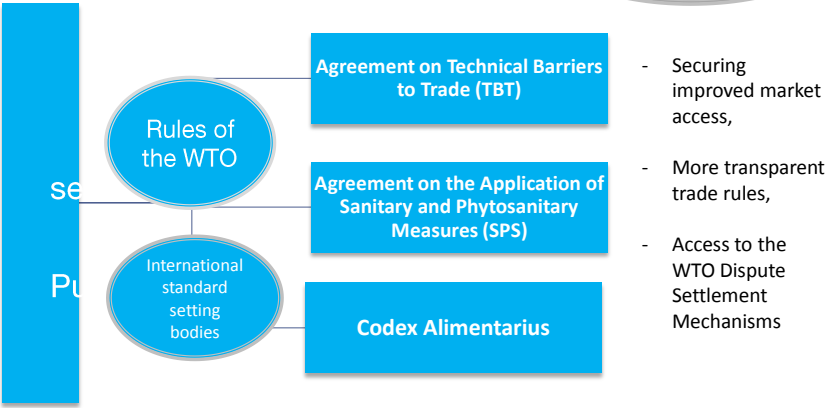


Value chain



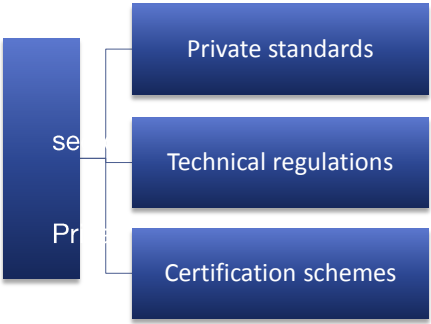
Regulatory framework

The major issue of market access is related to quality and safety requirements



Regulatory framework

The means for assuring buyers of safety and quality of products and the conformance of production and processing methods



Objectives of food safety and quality, animal health and welfare, sustainability of fish stocks, socio-economic considerations, corporate social responsibility

- **Government institutions** - enact regulations with the aim to protect customers and fair trade practices,
- **Buyers** - retailers, food service operators (internal standards to the company, might reflect product/process specifications required required for certification by a third party, focus on quality and safety),
- **Groups of producers/industry bodies** - regulations are usually designed to promote good practices within the industry, codes of conduct or codes of practices,
- **Coalitions of retail firms** - Global Food Safety Initiative,
- **Independant NGOs** – WWF (environmental implications on aquaculture).



Revitalizing markets for aquaculture products

1. Understanding consumers' perception and image of aquaculture products



- Frequency of buying fish products,
- Consumption patterns according to the levels of processing,
- Consumption habits according to the species,
- Preferences for production methods,
- Place of purchase,
- Barriers to consumption of aquaculture products,
- Consumption trends and opportunities.

Revitalizing markets for aquaculture products

2. Improving the perceived image of aquaculture products

Capitalization in communicating knowledge:

- Quality and healthy characteristics,
- Freshness (local/regional origin),
- Nutritional characteristics,
- Traceability along the value chain,
- Round-the-year availability at affordable prices,
- Environmental protection,
- Sustainability of feed,
- Production ethics,
- Animal welfare.
- Unique features of the Mediterranean and the Black Sea region,
- Attractive attributes of waters, diversified food culture, relaxation, holiday-inspired images.



Boosting markets for aquaculture products – possible marketing strategies for the sector



Coordinated marketing strategies focused on collaboration with B2B segment through cooperation with the industry stakeholders and the retailers for joint marketing actions



PR and promotional activities oriented at final consumers choosing a narrow target group of decision makers, oriented at quality and product origin, providing them product and service solutions



Joint communication concept has to be transferred through all value chain nodes in the sector stressing high quality, attractive image and safety of the products

Boosting markets – possible marketing activities in the frame of the strategies

Joint campaigns with retailers and producers:

- in-store demonstrations,
- non-traditional shelf placement,
- Advertising,
- Exhibitions,
- Promotional materials.

Joint activities with producers:

- Highlight the image of the products in the activities like competition events, festivals, and other arrangements,
- Involvement of a network of public administration.

Arena for B2B communication:

- Master Classes,
- Industry, retail and Ho-Re-Ca meetings and seminars,
- Attractive and modern information platforms for B2B stakeholders.

Training:

- Training of stakeholders in trade and B2B (retail and Ho-Re-CA),
- Training of younger consumers and children involving mass-media.

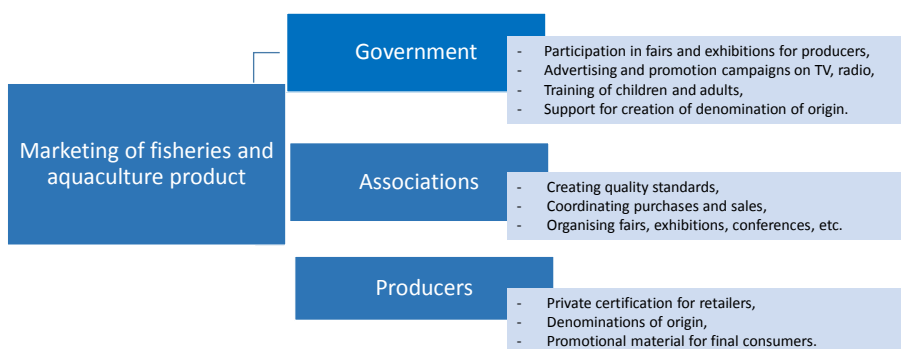
Communication:

- Cooperation with the leading mass-media and B2B communication, press grants,
- Support dialog with press about all promotional activities for the Mediterranean and the Black Sea aquaculture products .

Joint campaigns with retailers and producers aimed at final consumers:

- Participation in various programmes,
- Printed and web-based materials,
- Relevant PR and tasting events.

Good practices and lessons learned - Spain



Spain

► Association of Marine Aquaculture Producers (APROMAR)



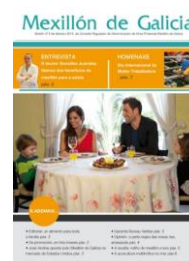
- One of the main activities was the coordination of a promotional campaign on TV under the brand “Crianza del Mar” to endorse the quality of Spanish marine aquaculture products,
- The quality is guaranteed by strict compliance with the brand rules,
- The seabass and seabream are easily identified by a plastic label showed the brand logo,
- Campaign “We are inseparable” to boost European fisheries and aquaculture sector: information from the EC and on Common Fisheries Policies, inspirational stories on sustainable seafood, information on sustainable seafood



► Organisation of Producers of Galician Mussels (OPMEGA)



- All members are registered with the Galician Mussels Regulatory Council and use its denomination of origin “Galician Mussels” to add value to their products,
- The purpose of the Regulatory Council is to promote Galician Mussel quality, whether in production activities, as in transformation and distribution, to offer the consumers a product that matches their expectations and requirements,
- OPMEGA has 1 230 member producers representing 1 800 floating platforms, 12 associations of producers are members of OPMEGA,



Spain

► The Inland Aquaculture Organisation “OPAC”

- Promotional campaign included a series of cooking shows on TV. The flavour, nutritional value, the freshness and the competitive price of rainbow trout were highlighted. The promotion led to increased sales, and retailers communicated the result to producers that trout went up from a top-25 product to a top-10 product.

► The Inland Aquaculture Organisation “OPP-22”,

- “PISCIS Platform” – aims to achieve improved functionality through enhanced communication and presentation utilising online resources. Support in the organisation of fairs and exhibitions, conferences and seminars for the industry, and creation of quality standards.

► The Spanish Aquaculture Observatory Foundation (FOESA)

- Travelling fish and seafood exhibition, and an aquaculture education day. Informative actions included brochures with information about nutritious value of aquaculture products, the importance of fish in the Mediterranean diet, and focus on aquaculture to achieve environmental sustainability and protection of biodiversity.

Good practices - Italy



Role of the association

- Codes of conduct: FAO, FEAP, API
- Principles of traceability, eco-compatibility, food and feed safety, animal welfare
- Labelling and Product Certification
- **Implementation of International rules/laws**



Italy - API GMP activities

- **API - Code of Good Farming Practice in Aquaculture**
- **Agreement Protocol for a transparent and guaranteed feeling of Italian aquaculture fish**
- **Certified Italian Aquaculture Product**



Certified Italian Aquaculture Product

The Certified Product is accompanied by a conformity mark which is verified and controlled by an external accredited body.

(2008 - Consorzio Acquaicultura Italiana)



Certified Aquaculture Products are trout, sea-bass and sea-bream:

farming phases
hygiene and health - feeding - traceability

presentation on the market of fish
freshness - morphologic characteristics -
nutritional and organoleptic characteristics - food safety -
more information for the consumer



Good practices and lessons learned - Turkey

Turkish Seafood Promotion Committee



Stakeholders:

- Turkish Exporters Assembly,
- Ministry of Economics, General Directorate of Exports,
- Aegean Exporters' Associations,
- Istanbul Exporters' Associations,
- Mediterranean Exporters' Associations

Turkey

Domestic consumption campaign

Aim: To increase the fish Consumption in Turkey by penetrating it into Turkish Cuisine

Target audience: Primarily kids and young parents then all family members

Messages:

For kids: fish is interesting, delicious and makes you grown and strong

For parents : Fish is healthy, consist of quality nutrients, safe, economic, convinience and easy-to-cook



Source: Seafood Promotion Committee in Turkey

Turkey

Website

- ▶ Creating a reliable informative source

Preparing a Recipe Book

- ▶ For solving the challenge of cooking

Public Service Audience

- ▶ By national TV, increasing the awareness

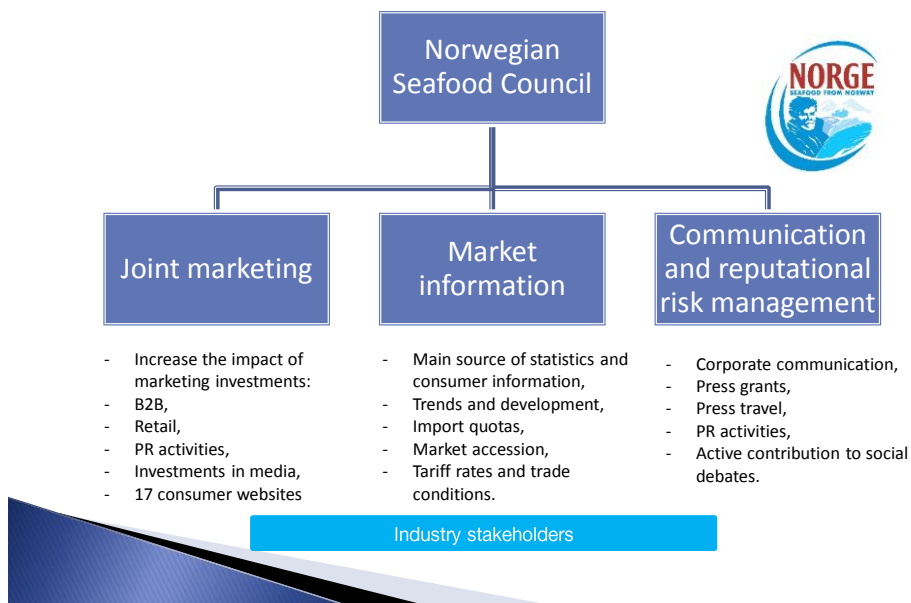
Public Posters and Adds

- ▶ Referring the PSA



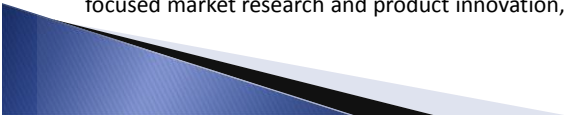


Good practices and lessons learned - Norway



Main priorities of the Mediterranean and the Black Sea aquaculture sector

Conclusions of the regional FAO-Eurofish-GFCM workshop (Turkey, November 2014):

- ▶ Current data collection systems are more production-focused, rather than trade and market-oriented;
 - ▶ Timely data and consumer analysis is essential to understand new developments in markets and value chains,
 - ▶ The level of aggregation needs to be expanded providing more disaggregated data,
 - ▶ Both industry and national authorities' role in data transmission and data collection need to be further supported,
 - ▶ Sustainable development of the aquaculture sector should be fostered through focused market research and product innovation,
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Main priorities of the Mediterranean and the Black Sea aquaculture sector

- ▶ Producers need to adapt a market-oriented approach, and better understand, create, communicate and deliver consumers' values within the marketplace,
 - ▶ Develop and implement coordinated marketing strategies and promotional activities at various levels,
 - ▶ It is important to increase fish consumption on domestic markets, reducing dependence on imports. Product development and diversification can lead to expanding domestic markets and increase visibility,
 - ▶ Increase a multi-stakeholder participation through a regional cooperative framework by improving communication between the stakeholders,
 - ▶ Establishing a pan-Mediterranean and Black Sea organisation will aid in marketing farmed fish to consumers around the region.
- 


Discussion points

► A shift from production-oriented growth to market-oriented approach

It is widely acknowledged that producers would benefit from shifting to a market-oriented approach from a production-oriented approach. This demands better understanding of markets and consumer preferences, better exploitation of external linkages with customers and value-chain partners, tailor offering products and services to those needs and accumulation and deployment of consumer data.

► Data/information collection and dissemination schemes

Comprehensive, accurate and timely flow of information on markets, consumer needs and trends is crucial for a balance between production and demand and the overall sustainable development of the sector. At present, there are a number of regional or global aquaculture data collection and dissemination systems, however, there is a gap between the needs of the sector and available statistical data which are more production-focused, rather than trade and market-oriented.




Discussion points

► Consumer's concerns - negative perceptions and image building - public communication -responsible aquaculture practices

Consumers can be increasingly influenced by the negative perception of the media and some NGOs on the aquaculture sector. The negative perception can be combated by active and accurate information and participation in social debates by the authorities and industry stakeholders to support the positive image of the Mediterranean and Black Sea aquaculture products.

► Promoting domestic consumption to boost demand and markets

Domestic markets often represent the closest and easiest markets with the most potential for boosting consumption of aquaculture products. A set of coordinated marketing strategies should be developed on the national level taking into consideration different characteristics of domestic markets.



Discussion points

- ▶ **Collective arrangement/actions and role of aquaculture farmers' organisations in sustainable aquaculture development-markets and marketing aspects**

Collective actions are very important for the implementation of common strategies for production and marketing aspects, however, many countries in the region face difficulties due to the fragmented structure of the sector and the lack of collective actions. In this regard, the creation and role of Aquaculture Farmers' Organisations should be further promoted at national and regional level.

- ▶ **Value chain- retail sector-distribution channels: opportunities and constraints**

Both organisational and adaptive responses are needed to answer to market changes since producers are losing negotiation power with different distribution channels, especially due to the structure and requirements of the modern retail sector, which is gradually replacing traditional wholesalers and fishmongers.

