

EUROFISH – REGIONAL ORGANISATION FOR FISHERIES IN EUROPE

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Eurofish International Organisation

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Eurofish
INTERNATIONAL ORGANISATION

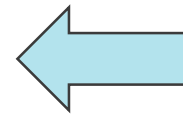
EUROFISH – WHO WE ARE?

WWW.EUROFISH.DK

The EUROFISH AGREEMENT - Mandate:

Information, advice and training to Central and Eastern Europe **focusing on trade and markets, fish processing and aquaculture**

EUROFISH



- Albania
- Croatia
- Denmark
- Estonia
- Italy
- Latvia
- Lithuania
- Norway
- Poland
- Romania
- Spain
- Turkey



FISH INFONetwork



www.fishinfonet.org

WHAT WE DO?

- Publications (e.g., Market reports, guides for the industry, etc.)
- Dissemination of information through:
 - EUROFISH Magazine
 - EUROFISH website www.eurofish.dk
 - EUROFISH Magazine website www.eurofishmagazine.com
- Advertising and promotion
- Organising seminars, workshops, business-to-business meetings
- Project execution and management



EUROFISH MAGAZINE

- Leading fishery and seafood magazine in English
- Bi-monthly
- Promotes industry and events in Eurofish member countries
- Features on countries, aquaculture, trade, equipment and technology, processing
- Free distribution to member countries

THE WEBSITE

Croatia



Capital: Zagreb
Population: 4.5 million (2013 est. World Factbook)
GDP: €56.6 billion (2013 est. World Factbook)
GDP/capita: €12.900 (2013 est. World Factbook)

Fish production:
Capture: 63,599 tonnes live weight (2012, Eurostat)
Aquaculture: 13,921 tonnes live weight (2012, Eurostat)
Export value: € 115.2 million (2013, Eurostat)
Import value: € 79 million (2013, Eurostat)

Overview of the Croatian fisheries and aquaculture sector

Fishing sector

With a sea surface of 31,067 km², over 1,000 islands and a coastline of 5,835 km (mainland and islands), Croatia has a long tradition in fisheries which provide a source of income throughout the year for the coastal and island communities. In addition, to being a source of supply for healthy food, fisheries are particularly important for adding value to the coastal tourism.

Commercial fishing is represented primarily by small-scale coastal fisheries: more than 80% of the fleet comprises vessels less than 12 m in length. However, the largest percentage of the catches (89%) is made by purse-seines, which represent ca. 5% of total fishing vessels.

Fishing takes place mostly in the Adriatic Sea, and it is characterised by multispecies fisheries. More than 45% of Croatia's fishing vessels are registered as multipurpose vessels that use different gears during the course of the year. The catches are primarily small pelagic species, sardine, and anchovy, which make up ca. 90% of the catches. The remaining catch is split between other fish (7%), bivalves and shellfish (2%), and crustaceans (1%).

Catches have increased from about 44,000 tonnes in 2005 to almost 75,000 tonnes in 2011. However in 2012 they decreased, mainly because the small pelagic catches fell by 11% compared to the previous year.

Processing and trade

Capture small pelagic fish is transformed chiefly into salted and canned products. Smoked and marinated products are also produced in small quantities.

Croatia is a net exporter of fish and seafood products. Export of farmed tuna is ranked fifth highest in the total export of agricultural products of the Republic of Croatia. Japan is the most important destination for Croatian tuna, while within the EU, Italy and Spain are the main export destinations for fresh fish and salted products, respectively. Demersal fish and cephalopods are exported fresh mainly to Italy. Export of fish and seafood in 2013 amounted to about EUR 115.2 million, split more or less equally between the EU and destinations outside the EU.

The value of Croatian fishery import is significantly lower than the value of export. Frozen herring, which is used to fatten tuna, is the most imported species, followed by frozen squid. Imports originate mainly in Spain, the Falkland Islands, Norway, Sweden, and Italy and amounted to a total of EUR 79 million.

Aquaculture

The aquaculture industry covers both marine and freshwater species. The most important marine species produced are

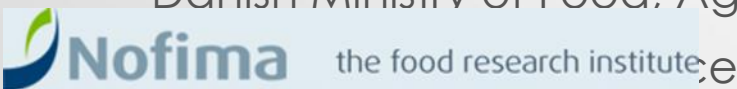
Member Countries

-  Albania
-  Croatia
-  Denmark
-  Estonia
-  Italy
-  Latvia
-  Lithuania
-  Norway
-  Poland
-  Romania
-  Spain
-  Turkey

EUROFISH MAGAZINE

Institutions sharing news:

- the Spanish Association of Marine Aquaculture Producers (APROMAR),
- the Spanish research institute for the mariculture sector (ctaqua), and
- the Latvian national fisheries network
- MPR Publishing House, Poland
- National Association of Aquaculture and Fish Products Producers (Lithuania)
- Turkish Marine Research Foundation
- Norwegian Institute of Food, Fisheries and Aquaculture Research (NOFIMA)
- Danish Ministry of Food, Agriculture and Fisheries



EUROFISH GUIDES

A Guide to Recirculation Aquaculture

An introduction to the new environmentally friendly and highly productive closed fish farming systems

Vodič za certificiranje u industriji proizvoda akvakulture i ribarstva

Uvod u mogućnosti osiguranja održivosti i kvalitete

Autor: Michael Larsen



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SA 800 ISO 9000 MSC
FRIEND OF THE SEA MSC
BRC MSC ISO 22000 ISO 9000
ISO 9000 IFS SA 800
THE SEA BRC ISO 22000 IFS

Eurofish



- Guide to Recirculation Aquaculture
- Guide to certification in the Aquaculture and Seafood Industry
- Translated versions of all Eurofish Guides can be: (i) freely downloaded from the www.eurofish.dk website, and (ii) distributed to the industry by the national counterparts

PROJECTS – NEW FOCUS AREAS

- Blue Growth initiatives
- By-products utilisation
- Industry-academia interaction
- Support of SME's and sectoral associations through FP 7 Framework programme

EUROPEAN MARKET OBSERVATORY FOR FISHERIES AND AQUACULTURE PRODUCTS (EUMOFA)

- Online EC tool for price monitoring along the supply chain, from first sales after landing to consumption
- **Monthly Highlights** - market trend analysis report
- Special focus on Croatia prepared in collaboration with the Croatian Chamber of Economy (July 2013)

European Commission

ISSN 2314-9971

E U M O F A
European Market Observatory for
Fisheries and Aquaculture Products

July 2013
**MONTHLY
HIGHLIGHTS**

CONTENTS

- First sales in the EU
- Global Supply
- Topic of the month:
Croatia**
- Consumption
- Macroeconomic context

In this issue

This month's highlights focus on first-sales data for ten commodity groups from nine Member States. Denmark, Portugal, and Sweden experienced increases in both first-sales value and volume. Greece and the UK saw increases in value and decreases in volume. Latvia registered the greatest decreases in both value and volume.

First sales of picarel and sardine in Greece and scallop and monk in the UK receive special emphasis in this issue.

On 1 July 2013, Croatia officially became the EU's 28th Member State. Croatia has a coastline of 5,835 km and more than 1,000 islands, and Croatia's fisheries and aquaculture are an essential source of year-round income for the local communities. The country is a net exporter of fish and seafood products, and more than 40% of its export value is absorbed by the EU, particularly Italy. Despite having increased over the past years, the yearly per capita consumption of fish and seafood (ca. 9.0 kg) is significantly lower than other Mediterranean countries.

Retail prices of fresh cod filets in Belgium, France, Sweden, and the UK vary between ca. 12.0 and 15.0 EUR/kg. Price convergence is observed. Prices in Belgium are fairly stable while they register large fluctuations in Sweden.

French and Greek fresh seabass retail prices differ significantly, for both farmed and wild species.

www.ec.europa.eu/fisheries/market-observatory

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SEA-BASIN COOPERATION MEDITERRANEAN, ADRIATIC, IONIAN AND BLACK SEAS

- Overview of the marine and maritime sectors
- Country features
- Scenarios analysis
- Interviews with key stakeholders
- Background paper for the Black Sea stakeholder conference, Bucharest, Romania, 30 January 2014 (incl. policy recommendations for the region)



SUPPORTING GOVERNANCE AND MULTI-STAKEHOLDER PARTICIPATION IN AQUACULTURE RESEARCH AND INNOVATION - AQUAINNOVA

The future of
Mediterranean Aquaculture
a meeting of European Aquaculture Distribution

3rd Aquainnova Consultation Workshop:
Hotel Meliá Princesa, Madrid, Spain
16-17 November 2011.

The vision for the future of Mediterranean aquaculture in Europe - and the research and innovation needed to support its key strategies - will be the focus of the third thematic workshop, organised by the European Aquaculture Technology and Innovation Platform, in the framework of 'Aquainnova', a European support action. This event follows the successful workshops that focused on 'freshwater' and 'Marine coldwater' aquaculture earlier in 2011.

Earlybird registration: € 50
After 17 October registration: € 80
To register visit: www.eatip.eu

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EATiP - European Technology Platform

The widest consultation ever made on European aquaculture

Vision document "The future of European aquaculture till 2030" has been developed



WTO AND FISHERIES WORKSHOP

- Three-day regional workshop “**World Trade Organization and fisheries**”, St. Petersburg, Russia, October 2013,
- 35 participants from 17 countries: **Albania**, Armenia, Belarus, **Croatia**, **Denmark**, **Estonia**, **Italy**, **Latvia**, **Lithuania**, Montenegro, **Norway**, **Poland**, **Romania**, Russia, **Turkey**, Ukraine and Serbia,
- Local and regional capacity building in trade and seafood safety,
- Development of supply, demand and trade of fisheries products,
- The WTO Doha round negotiations on fisheries subsidies, development of trade and import tariffs.



SUSTAINABLE DEVELOPMENT OF THE AQUACULTURE SECTOR FROM A POST HARVEST PERSPECTIVE WITH FOCUS ON QUALITY, TRACEABILITY AND SAFETY (FAO TCP)



- Countries: Albania, Croatia, Montenegro and Turkey
- Five national and one regional workshop organized : (i) project inception workshop, (ii) Food safety management in carp farming and processing, Daruvar, Croatia, (iii) Market requirements for the aquaculture industry, Zadar, Croatia, and (iv) regional workshop, Bodrum, Turkey (October-November)

MARKETING ANALYSIS

- Ongoing socio-economic and marketing analysis of the Croatian freshwater aquaculture sector focusing on carp and trout,
- The aim is to contribute to the competitiveness of the national freshwater aquaculture sector by investigating the current status and developments of the value chain of the industry, trade and markets, perspectives and market opportunities on the domestic and international markets.
- Two parts of the project:
 - a detailed analysis of the sector, review of best practices and recommendations
 - dissemination of the research results among the stakeholders of the Croatian aquaculture industry

PARTNERSHIP- MEDITERRANEAN REGIONAL DIMENSION

In May 2012 a Memorandum of Understanding was signed between the General Fisheries Commission for the Mediterranean (GFCM) and EUROFISH



FAO-EUROFISH-GFCM REGIONAL WORKSHOP “PREDICTING THE MARKET FOR SEABASS AND SEABREAM “

Focus on:

- Production and trade data availability
- Planning of seabass and seabream production
- Trade and marketing of seabass and seabream
- Fields of cooperation



Workshop conclusions will feed a debate of the panel on boosting markets for aquaculture during the Regional Aquaculture Conference to be held in Bari, Italy, 9-11 December 2014

BLUE GROWTH IN THE MEDITERRANEAN AND THE BLACK SEA



Regional Conference
Bari, Italy, 9-11 December 2014

Blue Growth in the Mediterranean and the Black Sea:

Developing sustainable aquaculture for food security



www.aquaculture2014.org



Blue Growth in the Mediterranean and the Black Sea:

Developing sustainable aquaculture for food security

Regional Conference
Bari, Italy, 9-11 December 2014

Context

The aquaculture sector in the Mediterranean and the Black Sea has grown significantly over the past years and has the potential to meet the increasing demand for fishery products and to foster economic growth. However, it is characterised by different levels and stages of development, as well as by greatly varying features among the different countries. The sector now faces major challenges to establish regulatory frameworks, set up mechanisms to monitor product supply, guarantee environmental sustainability, strengthen collective actions and dialogue between stakeholders, ensure participation in the value chain in balanced, adapt to new consumer demands and create a level playing field.

For many years, aquaculture actors and stakeholders in the region have been calling for a strategic commitment from governments to ensure coordinated and sustainable growth, and the organisation of a conference at the regional level has long been on the agenda of the General Fisheries Commission for the Mediterranean (GFCM).

Now is the time to take concrete action and seize the momentum created by the Italian Presidency of the European Union to unite all the efforts in the region.

Event highlights

The event will tackle issues of common interest to countries in the Mediterranean and the Black Sea and will aim to put together a strategic vision for the sustainable development of aquaculture in order to foster socioeconomic growth and food security in the region.

Keywords: Aquaculture, Simplification, Growth, Sustainability

9 - 10 December 2014: Expert Panels

- Panel 1: Regulatory framework, governance
- Panel 2: Environment, risk management
- Panel 3: Market for aquaculture products
- Panel 4: Technology, innovation and diversification

11 December 2014: High-level Conference

A final declaration highlighting the strategic commitment to support regional aquaculture priorities will be adopted at the end of the conference.

www.aquaculture2014.org

Welcome note

The EU Blue Growth Strategy is designed to support sustainable growth in the marine and maritime sectors. It recognises that seas and oceans provide the European economy with great potential for innovation and growth. The Integrated Maritime Policy aims to achieve the goals of the Europe 2020 strategy for smart, sustainable and inclusive growth and aquaculture is one of the key areas that this policy targets.

The aquaculture industry is strategically important to the European Union and the Mediterranean and Black Sea countries, as it helps to contribute to food security and provides consumers with a high quality, nutritious, safe and relatively inexpensive source of protein. The European Union intends to boost aquaculture through the reformed Common Fisheries Policy. This will build on the EU Strategic Guidelines for the sustainable development of EU aquaculture and on multiannual national strategic plans.

Although the marine aquaculture sector in the Mediterranean has succeeded in terms of production growth, it has been plagued by a seemingly endemic cyclicity manifested in regular periods of boom and bust. Some countries have recently shown impressive growth in the last decade; at the same time aquaculture remains less developed in other parts of the region.

The future of aquaculture growth in the Mediterranean and Black Sea, is greatly dependent on the resolution of problems common to all countries. These include competition for space, the reduction of administrative burdens, competition with imported products and the high costs associated with compliance to stringent environmental, health and animal welfare regulations. It is essential that there is adequate spatial planning that allocates space for production units in an efficient and cost-effective manner. This must protect the environment and minimise conflicts with other users and is essential for the future growth of the sector. The main challenge that policy-makers face is to create a productive environment for the aquaculture sector. If this is done, aquaculture can continue to grow while meeting peoples' needs for healthy, high quality, safe and nutritious fishery products, and preserving the natural environment in sustainable ways. This implies also that if we want to support the development of the sector simplifying the rules and regulations governing aquaculture activities is essential.

To find out more about and to actively participate in the debate on the perspectives and challenges for future growth of the aquaculture sector in the region, I invite you to join us at the conference "Blue Growth in the Mediterranean and the Black Sea: Developing sustainable aquaculture for food security". This will take place in Bari, on the Adriatic coast of Italy, 9-11 December 2014.

Riccardo Rigolo

Director General for Maritime Fisheries and Aquaculture
Ministry of Agriculture, Food and Forestry of Italy



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www.aquaculture2014.org

Regional Aquaculture Conference 2014

9-11 December 2014, Bari, Italy

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



Presidenza Italiana
del Consiglio
dell'Unione Europea



Food and Agriculture
Organization of the
United Nations



In partnership with

Eurofish
EUROPEAN FEDERATION OF FISH FARMERS



**THANK YOU FOR YOUR KIND
ATTENTION!**