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Data information: the Mediterranean observatory

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SUMMARY - The ICRAM project, financed by Ministry of Agriculture and Natural Resources, aims to analyse the basic elements necessary to set up a computerised system on market topics of Mediterranean aquaculture, capable to elaborate the structural and economic parameters. The project will develop the analysis of official statistics through the following themes:

- identification of the main statistics;
- analysis of domestic supply of Mediterranean aquaculture;
- analysis of domestic demand of Mediterranean aquaculture;
- trade relations;
- market channels.

The above mentioned data will relate to sea bass and sea bream production in the following countries: Albania, Algeria, Cyprus, Croatia, Egypt, France, Israel, Italy, Greece, Malta, Morocco, Spain, Tunisia and Turkey. Taking into account a general competitive scenario in the aquaculture sector, it is so necessary to define the economic and commercial aspects of the sector, capable of making a more accurate and precise programming of the interventions from the administration. The main objective is thus to exceed a limit of knowledge and computerisation and give the necessary assistance to the national administration and to the producers, both Italian and Mediterranean, giving information about productive and commercial structures and existing competitive mechanisms. A first meeting among the Mediterranean countries was held March 1995 in Rome, during which the present situation of aquaculture in the involved countries was focused on. Each year a meeting will be held, in the meanwhile a questionnaire regarding import and export will be filled and sent to ICRAM. This data will be gathered and redistributed to all the participants and to the Italian producers.

Key words: Mediterranean aquaculture, market, demand, data information.

RESUME - "Données informatives: L'Observatoire Méditerranéen". Le Projet ICRAM, financé par le Ministère de l'Agriculture et des Ressources Naturelles, vise à analyser les éléments de base nécessaires à l'établissement d'un système informatique sur des thèmes de marché concernant l'aquaculture méditerranéenne, et permettant l'élaboration des paramètres structurels et économiques. Le Projet développera l'analyse des statistiques officielles dans le cadre des thèmes suivants:

- identification des principales statistiques;
- analyse de l'offre intérieure de l'aquaculture méditerranéenne;
- analyse de la demande intérieure de l'aquaculture méditerranéenne;
- relations commerciales;

- filières de marché.

Les données citées auparavant se rapporteront à la production de loup et de daurade dans les pays suivants: Albanie, Algérie, Chypre, Croatie, Egypte, Espagne, France, Israël, Italie, Grèce, Malte, Maroc, Tunisie et Turquie. En considérant un scénario de concurrence généralisée dans le secteur de l'aquaculture, il est ainsi nécessaire de définir les aspects économiques et commerciaux du secteur, pour permettre une programmation plus exacte et précise des interventions de la part de l'administration. L'objectif principal est ainsi de parvenir à un plus haut niveau d'informatique et de connaissance et de fournir à l'administration nationale et aux producteurs, tant italiens que méditerranéens, la nécessaire assistance, en leur apportant des informations sur les structures productives et commerciales et sur le mécanisme compétitif existant. Une première réunion entre pays méditerranéens a eu lieu en mars 1995 à Rome, au cours de laquelle fut étudiée la situation actuelle de l'aquaculture dans les pays concernés. Chaque année se tiendra une réunion, et entre-temps, un questionnaire relatif aux importations et aux exportations sera rempli et renvoyé à ICRA. Ces données seront compilées et redistribuées à tous les participants et aux producteurs italiens.

Mots-clés : *Aquaculture Méditerranéenne, marché, demande, données informatives.*

INTRODUCTION

The quick evolution of production dynamic aquaculture has been characterized by a large spread of modern rearing technologies, originally developed in a limited number of producer countries, but actually spread along the whole european and mediterranean area. The actual competitiveness problems make difficult the artisanal units to stay in the market, artisanal both on the view of technology and productive organization.

Owing to the high social and economic component of the sea bass and sea bream production, it is so essential in the mediterranean area to try to reduce the possible impact that will happen on the producers. Taking into account in many countries aquaculture is an answer to traditional problems like reorganization of fishermen, owed to fishing effort reduction in the over exploited areas, it is so necessary that a new competitiveness production means actually a market expansion.

The actual competitive scenary is infact characterized by a price reduction, owed to a national and international supply higher than demand, non transparent trade, quality problems, pathologies.

In such a contest the public and private investors need to enlarge the informative background on which to found their future managing activities; it has been pointed out the lack of a statistic and economic support, capable to aid the investors in the productive choices according to the international market changes. This has been stated both at national and european level (EC Rule 2080/93) where a setting up of monitoring system capable to support the public administration in their aquaculture programming activity could be financed.

The ICRAM project "*Mediterranean observatory on market aquaculture*" will try to cover the lacks about knowing structural and economical parameters of mediterranean aquaculture sector and to point out the market capacity of North Europe countries.

The project, financed by the italian Ministry of Agriculture and Natural Resources, will also develop cooperation among different institutes involved in the aquaculture sector in the mediterranean area.

THE STATE OF THE ART OF AQUACULTURE STATISTICS IN THE MEDITERRANEAN

The project will be able to gather a relevant number of informations, actually existing in different public and private institutions, in order to set up a managing instrument both for the public administrations and for potential entrepreneurs. Here will be analyzed the existing statistic systems, both at italian level and mediterranean.

a) The Italian statistic system. In Italy the official source appointed to give aquaculture data is ISTAT, then other institutes (ICRAM, ISMEA, API) elaborate both biological and economic statistics.

The ISTAT system gives data about the firm and activity in order to focus the productive cycle of the species grown. The system lacks data about prices and production value, employment and invested capital, all these data necessary to elaborate any investment planning. About prices, ISTAT gives average monthly data of the fish markets, not distinguishing among production prices and wholesale; then the data refer only to fish markets, not considering the transactions out of the markets (about 70%); finally there is no distinction among species cultured and from the sea.

About availability of aquaculture prices, the only source, non official, is API (Italian Producer Association); the associated producers meet monthly to establish reference price according to ex farm quotation. It has to be noted that being reference prices, they could be different from the real selling prices.

b) The Mediterranean system. The FAO Fishery Information, Data and Statistics Service is actually the most updated and exhaustive source of mediterranean aquaculture statistics. The ICRAM project doesn't want to duplicate the FAO activity, but it is necessary to cover possible lacks with ad hoc analysis and to investigate specific matters.

METHODOLOGY

The actual situation is characterized both by an informative problem, that is to say the informations don't reach everyone at the same time and a problem of demand diversification capable to expand itself in those countries not traditionally consumers of sea bass and bream.

For the above mentioned situation, it has been focused two actions:

- to gather and spread data about quantity and prices per species (the data will refer only to sea bass and sea bream);
- to point out strategies capable to improve demand for those species.

These actions will be realized by ICRAM in collaboration with IREPA. In particular ICRAM will keep on monitoring production and market aquaculture data in the following countries: Albany, Algeria, Cyprus, Croatia, Egypt, France, Greece, Israel, Malta, Morocco, Spain, Tunisia and Turkey.

In order to ensure homogeneity to the gathering of the data, each year a seminar will be organized with the responsible of the monitored countries. The system will provide the use of the data at real time, through a communication via modem and the publication of a bulletin. These data will be spread to all the participants and to the possible public users of the involved countries.

OBJECTIVES

The project aims to reach the following objectives:

1) to gather the productive and commercial data of aquaculture in the involved countries. The data will refer to:

- analysis of domestic supply of mediterranean aquaculture;
- analysis of domestic demand of mediterranean aquaculture;
- trade relations;
- market channels.

Since official statistics give price of sea bass and sea bream, not specifying species from fish and from aquaculture, the project will try to cover this lack. The country responsible will fill quarterly a questionnaire indicating export and import flows by single species (sea bass, bream and juveniles) and target area (volume and value) indicating the country of destination and origin (See Table 1).

Then a comparative analysis of the legislation relating to the bureaucratic aspects in the Mediterranean countries will be done.

To reach the above mentioned data a seminar with all the country responsible will be organized yearly.

A first meeting among the mediterranean countries was realized march 1995 in Rome, during which it was focused the actual situation of aquaculture in the involved

countries. These countries have produced 31.412 tons of sea bass and sea bream during 1994, and 205.439.501 of juveniles (Tab.2, Tab.3).

2) Due to a competitive scenary, as said before, there is a need to expand the market for sea bass and bream in those countries not traditionally consuming eurialin species; therefore a second aim of the project is to analyze the criteria and the actions necessary to expand the demand for mediterranean species in North Europe countries. In particular, through the study of the potential commercial area, the project aims to develop the foreign demand. The following matter will be analyzed:

- a - existing market surveys in North Europe countries;
- b - commercial and market channels in those countries;
- c - evaluation of market expansion according to fish consumption and study on the demand;
- d - points of strength and weakness of the commercial systems.

The above mentioned aspects will be analyzed through ad hoc workshops with expert from North Europe countries (Belgium, France, Germany, Great Britain and Norway).

CONCLUSIONS

The Mediterranean Observatory has been financed by the Ministry of Agriculture and Natural Resources in order to create a monitoring system capable to support the public Administrations in their planning activities of aquaculture investments. In the meanwhile it could be a useful instrument to the private entrepreneurs giving informations about market trends in the mediterranean area.

The main objectives are:

- 1 - data information system on market aquaculture related to sea bass and bream in the Mediterranean area;
- 2 - to analyze the criteria and the actions necessary to expand the demand for mediterranean species in North Europe countries.

Finally it will also develop cooperation among different institutes involved in the aquaculture sector in the mediterranean area.

Considering these aims, the Observatory could be a large useful managing instrument, since it comes from the need of the final users to carry out investment choises according to an adequate informatic background.

Tab. 1 COUNTRY _____
EX FARM PRICES/QUANTITIES BY QUARTER

SPECIES	QUARTER								TOTAL YEAR	
	1°		2°		3°		4°			
	Q	V	Q	V	Q	V	Q	V		
SEA BASS	minimum									
	maximum									
	medium									
SEA BREAM	minimum									
	maximum									
	medium									

SPECIES	QUARTER								TOTAL YEAR	
	1°		2°		3°		4°			
	Q	V	Q	V	Q	V	Q	V		
JUVENILES	<1 gr									
	1-5 gr									
	5-10 gr									
	10-50 gr									
SEA BASS	<1 gr									
	1-5 gr									
	5-10 gr									
SEA BREAM	<1 gr									
	1-5 gr									
	5-10 gr									
	10-50 gr									

Q = 000 Kg
 Species V = USD/Kg
 Juveniles V = USD/ units

Table 2. Aquaculture production in the Mediterranean (1994). Quantity (tons)

	SEA BASS	SEA BREAM
CYPRUS	21	188
CROATIA	1,900	60
EGYPT	300	450
FRANCE	2,340	740
GREECE	6,500	5,500
ITALY	2,850	1,850
MALTA	350	550
MOROCCO	114	487
PORTUGAL	118	397
SPAIN	351	2,094
TUNISIA	614	38
TURKEY	1,200	2,400
TOTAL	16,658	14,754

Table 3. Juveniles production in the Mediterranean (1994). Quantity (number)

	SEA BASS	SEA BREAM
CYPRUS	860,000	5,200,000
CROATIA	-	-
EGYPT	3,650,000	7,850,000
FRANCE	25,850,000	3,500,000
GREECE	38,000,000	42,000,000
ITALY	19,000,000	19,200,000
MALTA	-	500,000
MOROCCO	3,200,000	2,800,000
PORTUGAL	1,007,120	733,381
SPAIN	4,350,000	27,000,000
TUNISIA	-	-
TURKEY	7,739,000	1,000,000
TOTAL	103,656,120	101,783,381