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Presentation of MASMANAP Concerted Action: Objectives and results

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SUMMARY – This paper presents the objectives and the results of the MASMANAP Concerted Action funded by the FAIR programme of the DG Fisheries of the European Commission. The objectives of this Concerted Action were to develop a methodology for seafood market studies to assist the introduction of new aquaculture products.

Key words: Aquaculture, market.

RESUME – "Présentation de l'Action Concertée MASMANAP : Objectifs et résultats". Ce texte présente les objectifs et les résultats de l'Action Concertée MASMANAP financée par le programme FAIR de la DG Pêche de la Commission Européenne. Les objectifs de cette action concertée étaient de développer une méthodologie pour réaliser une étude de marché dans l'optique de développer de nouveaux produits aquacoles.

Mots-clés : Aquaculture, marché.

How to develop a market driven strategy for aquaculture

The SELAM Network, which was created in 1994 within the framework of the Aquaculture Committee of the General Fisheries Commission for the Mediterranean (GFCM) and the Fisheries Department of the FAO, emerged as the starting point of this Concerted Action. Indeed, between 1994 and 1998, the SELAM network organised several meetings, workshops and seminars about marketing issues of Mediterranean aquaculture, under the coordination of the International Centre for Advanced Mediterranean Agronomic Studies through the Mediterranean Agronomic Institute of Zaragoza (CIHEAM-IAMZ).

These SELAM activities made it possible for aquaculture experts and seafood marketing experts to gather and to exchange information and viewpoints. A group of four of these experts decided to broaden this perspective to the whole European market and to submit a proposal to the FAIR call of projects of the DG Fisheries of the European Commission.

The aim of this project was to merge two fields of research: (i) marketing research on aquatic food products; and (ii) diversification issues in aquaculture. The combination of skills associated with these two areas was considered necessary by the project participants in order to develop an effective market driven strategy for aquaculture.

The marketing situation of Mediterranean aquaculture

Marine aquaculture in the Mediterranean has increased steadily over the last ten years. At present, the main marine fish species cultured commercially on an intensive scale in the Mediterranean countries are sea-bass and sea-bream. In spite of this increase in production, mainly due to significant technical developments, Mediterranean aquaculture is still far behind the Northern European salmonid industry in terms of level of production, production costs, market internationalisation and product differentiation.

Between 1988 and 2000, the production of farmed salmon in Europe increased from 100,000 tonnes to 630,000 tonnes. The production of sea-bass and sea-bream, which was almost insignificant in 1988, reached 120,000 tonnes in 2000, equivalent to the level of salmon aquaculture in 1988.

Meanwhile, the price of these products fell substantially, falling in constant terms from 10.3 euro/kg in 1988 to 3.5 euro/kg in 1999 for salmon (with a recovery to 4 euro/kg in 2000) and from 20.9 euro/kg to 5.3 euro/kg for sea-bass. For the same volume of production, the price of farmed sea-bass and sea-bream now is half that which prevailed for salmon ten years ago.

Salmon and sea-bass/sea-bream farming activities have both been highly involved in international trade from their launch. The level of internationalisation of these species for fresh product is more than 60% for salmon and more than 40% for sea-bass/sea-bream. But there is still a large difference between salmon and sea-bass/sea-bream. Almost 30% of the European salmon production is exported outside the EU, and the 70% for the European market is equally shared in three centres, i.e. France, Denmark and the other member states. On the contrary, 95% of the sea-bass and sea-bream production throughout Europe and along the Mediterranean area is sold in the EU with the exception of the Italian market which absorbs 50% of the trade.

Two factors may explain the success of salmon on the European markets: (i) the worldwide traditional image of an up-market product; and (ii) the ability of this species to be marketed in a very diversified range of product sizes and presentations. On the contrary, the connoisseur's market for a small and expensive fish like sea-bass or sea-bream is not (yet) so large as the market for a reasonably priced big fish like salmon which is sold in fillets, steaks and many other preparations.

While the aquaculture sector is developing, an in-depth transformation of market conditions is ongoing in Europe, which remains the main target market for Mediterranean aquaculture products. The most important issues are the rapidly expanding role of supermarkets in the distribution chain, the development of new processing techniques like pre-packed fresh fish, the growing importance of catering and the evolution of more sophisticated food consumer behaviour.

All these different elements must be taken into account when trying to drive aquaculture according to marketing issues. The analysis of the general trends of the market for food and seafood products absolutely must be undertaken with regard to the specific constraints of aquaculture in terms of production costs, dependence on environmental factors and zootechnical constraints.

Objectives of the Concerted Action MASMANAP

In response to the aquaculture industry's need for more market knowledge, the past decade has seen a surge in the number and variety of market analyses of fisheries products. With the increasing supply of farmed fish, there has been a corresponding increase in interest in marketing-oriented issues, such as the potential demand for new or differentiated products and the effects of advertising on consumer demand. Nevertheless, it remains very difficult to predict accurately the European market for sea-products because of the heterogeneity and the variable degrees of reliability of official or non-official databases. Moreover, it has also been shown that there was no direct causality between attitude and effective behaviour in food and particularly seafood consumption, which underlines the need for more objective data to complementary studies.

The objectives of the MASMANAP were to develop a common market study methodology for all European countries and to build a multi-criteria approach in order to assess the new potential outlets for aquaculture products. Whatever the specificity of aquaculture products may be, these products enter the wide market for seafood and their potential has to be assessed with regard to the market for seafood as a whole. Also, given the high level of internationalisation of the seafood market in Europe, all the national markets have to be taken into account through the screening of a common methodology in order to highlight and to assess individual national characteristics and features.

This multi-criteria approach combines different ways of assessing the market: (i) to highlight the main trends of aquatic food supply due to the evolution of capture fisheries, the development of aquaculture production and the growth of external trade; (ii) to measure consumer purchases through panel surveys; (iii) to analyse ad-hoc seafood market studies about attitude and perception of the consumers; (iv) to survey new aquaculture products on the market; and (v) to identify the expectations of distributors, processors and other intermediaries in the fish marketing chain.

For these reasons, the MASMANAP Concerted Action was split into different tasks, which have

been undertaken to ensure comparison between each of the eight national markets covered by the project: France, Germany, Greece, Italy, Norway, Portugal, Spain and the United Kingdom.

Results and forthcoming presentations

This seminar proves that the project has given valuable results on at least two points: (i) a better quantitative and qualitative knowledge of the European markets through a common comparative approach; and (ii) a multi-criteria methodology making it possible to link more easily statistical data and consumer attitudes for a better understanding of the demand for seafood in general and for aquaculture products in particular.

This Concerted Action has revealed how difficult, but also how enriching, it may be to work at an international level, among experts from different countries and different institutions. To find a common aquatic-foods language has turned out to be the most time consuming step, but a necessary one in order to give some meaningful interpretation of the heterogeneous market data.

At this stage the work may be used as a tool-box in order to practice a continuous survey of the market trends and to improve efficiency when focusing on a specific market segment. Since the beginning of the Concerted Action, the BSE crisis has highlighted the impact of food choice on European, and other, consumers. Nevertheless, it remains important to use a multi-criteria approach when assessing the real consequences on seafood consumption in order not to overemphasise some emotional factors. This event has had different impacts in each country, and further reactions may yet unfold. Only a common methodology will make it possible to measure and to compare the real effects of the meat crisis, and in turn the impact for aquatic food. However this process is a vital component of efforts to anticipate the demand for new aquatic food products.