

**Project places hitherto** unseen emphasis on coastal fisheries

# Finding a formula for Success

Coastal fisheries represent about 70% of the total fisheries in Europe and are the lifeblood of coastal communities, supporting subsistence and livelihoods across the region. However, the continuous decline in income and employment in the sector, caused partly by increased competition with large scale fishing, has made imperative the need for innovative responses that are both sustainable and inclusive.



**The Success team at Slowfish in Genova presented more than 200 visitors with case studies and movies on success stories from coastal fisheries across Europe.**

**E**urofish Magazine visited the “Success” stand at the Slowfish event in Genova to hear about “success stories” from different European countries and how these can be used as models to improve coastal fisheries in other areas.

## Consumers willing to pay more

Consumers’ preferences and willingness to pay for fish caught from coastal fisheries was surveyed in eight countries with over 4,000 participants. The study found that the main reasons for preferring local production of fish was greater freshness, followed by support for the local economy, and shorter transport distances. Consumers were apparently also willing

to pay up to 12% more for fish caught from coastal fisheries. Ms Daurès elaborates, “the first results of this broad analysis at European level highlight that there is a significant opportunity for fresh products and for products from local suppliers. Overall, consumers say they are willing to pay a substantial premium, though this varies from country to country – high in Germany and Italy and less in Finland.” Fifteen percent of the consumers termed small scale coastal fisheries an important element of sustainable fisheries.

Additional results on consumer perceptions specifically from France and Italy show that the definition of “coastal fisheries” is not always clear, although most

respondents associate the term with ‘local’. In all cases, the words “coastal fisheries” had positive connotations, including ‘higher sustainability’ (both environmentally and economically), ‘better food experience’ with regards to quality and variety, ‘fresher products’ and ‘greater confidence’ in producers. Some negative connotations relate to environmental issues like pollution and overfishing, but the good far outweigh the bad.

When comparing consumer perceptions in larger cities like Paris with smaller ones along the coast, it is apparent that small coastal cities are much more positively inclined towards coastal fisheries than the large inland cities, where knowledge about coastal fisheries is lacking and where the

term “coastal” is associated more with leisure activities.

## A label with a difference

Positive consumer perceptions towards coastal fisheries can be put to good use. In Brittany, France, where fishermen are economically dependent on their sea bass catch, which makes up more than 50% of their revenue. In the nineties, the fishermen faced strong competition from farmed sea bass imports along with growing competition from large scale fishing vessels. This created the need for diversification and the label, “Association des ligneurs de la Pointe de Bretagne,” (Association of liners from Brittany) was created in 1993. Since the label has existed for such a long time it’s success is undeniable with long term statistical evidence.

Sea bass sold by members of the association could charge a substantial higher price than other fishermen. The price premium compared with liners that were not members was about 15% while compared with netters and trawlers it was over 60% per kilo. And the differences in prices increased over time according to data comparisons from 2000 to 2014. “People are confident in our products and know the label signals traditional fishing and guaranteed freshness,” says Ken Kawahara, who represents

**The SUCCESS Project**  
The "Coastal Fisheries" case study

Fabienne DAURÈS  
Ifremer, UMR Amure

**The SUCCESS Project**

- "Strategic Use of Competitiveness towards Consolidating the Economic Sustainability of the European Seafood sector"
- Horizon 2020, Duration: 2015-2018
- Objective: Reinforcing the competitiveness of the European fisheries and aquaculture industries
- Interdisciplinary team of 24 partners from all over Europe (economy, marine science, sociology, psychology)

**Work Packages**      **Case Studies**

**Focus on "Coastal Fish" case studies**      **Expected impacts**

- Consolidation of the economic sustainability of European fisheries and aquaculture sectors (marine and freshwater)
- Scientific support to fishermen and aquaculture producers to better understand and benefit from the functioning of their markets
- Availability of tools for production planning and development of novel product and markets, taking into account trends in the local and global seafood value chain and consumers preferences
- Better understanding of the value chain organisation and of prices cycles, including in particular the "boom and bust" cycles, and availability of solutions for predicting and avoiding similar situations in the future
- Boosting the competitiveness of European seafood products by identifying the added value of existing marketing tools and their potential in steering European consumers' choices

IFREMER, URM, UMR 6308 AMURE  
UMR, Rue Dumont d'Urville  
75280 Plozévet (France)  
Contact: Fabienne Daurès  
Phone: +33 290915623  
E-mail: fabienne.daurès@ifremer.fr

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**Coastal Fish is only one of several case studies of the Success project and the first time it is addressed on its own in parallel to other species.**

the association. These findings demonstrate that it may be useful to implement a simple generic brand for small scale traditional fisheries, something that is currently being considered for implementation at the national level in France, and that perhaps should also be contemplated at the European level.

For more information and other success stories visit the SUCCESS website <http://www.success-h2020.eu> where posters and short movies feature different cases. Or contact Fabienne Daurès on [fdaurès@ifremer.fr](mailto:fdaurès@ifremer.fr).

*Thomas Jensen, [thomas.jensen@eurofish.dk](mailto:thomas.jensen@eurofish.dk)*

**SUCCESS in a nutshell**



SUCCESS or "Strategic Use of Competitiveness towards Consolidating the Economic Sustainability of the European Seafood Sector" is a European research project financed over 3 years (2015-2018) and is part of the H2020 Strategy, an EU Research and Innovation programme that provides funds for a seven year period (2014-2020). The overall aim of the project is to reinforce the competitiveness of the European fisheries and aquaculture industries.

SUCCESS brings together an integrated team of scientists from all fields of fisheries and aquaculture, along with industry partners and key stakeholders. The project consists of different work packages or topics examined from a scientific point of view: consumer preferences; how the different sectors organise themselves in management systems and producer organisations; and the fish trade value chain covering all actors from fishermen to consumers.

The SUCCESS consortium includes 24 academic partners (universities, research centres) and non-academic partners (industrials, firms) from 11 different countries. For more information, visit [www.SUCCESS-h2020.eu](http://www.SUCCESS-h2020.eu).

# The first workshop on mussel farming hosted by the SUCCESS project in Cattolica, Italy, 27 May 2017

Giuseppe Prioli, President of the European Molluscs Producers Association (EMPA), presented an overview of the European and Italian mussel sector and its main opportunities. In 2014, 450,880 tonnes of mussels were farmed in the EU. Spain is the biggest producer, with 195,375 tonnes, compared to Italy, which produces 63,731 tonnes.

## Italian mussel sector faces many obstacles to increase production

Eraldo Rambaldi, Director of the Association of Mediterranean Aquaculture Producers (AMA) elaborated on the main issues currently concerning the mussel sector.

The lack of spatial planning in Italy is one of the main obstacles prohibiting increased production, since mussel farming competes against many other sectors for the space it needs. Another issue is that the local authorities administer the national regulation in different ways that hinder producers, who are working now to get these problems solved. The Italian sector consists of many

small, family-based farmers, who are often former fishermen, so the lack of professionalism and small size are also issues that need to be addressed. Merging into larger units or cooperating to form a consortium of producers under one professional seller are some solutions that would help the sector get more bargaining power over super-markets.



The workshop for stakeholders in the Italian mussel farming industry brought together 40 participants representing 30% of the sector.

A case study from the SUCCESS project was presented by Sophie Girard of France's IFREMER – AMURE Brest. Countries chosen for the study included Spain, Italy, France and the Netherlands as the top four producers in Europe. According to the study, in 2014, about 1,000 people were employed in the Italian mussel sector in 159 companies. The mussel prices indicator for the Netherlands was €1,4 per kilogram compared with €0,73 per kilogram in Italy, and overall, the blue mussels in northern Europe had higher valorisation when compared with the Mediterranean mussels. The costs structure was also presented; one remarkable result was the labour costs distribution among Spain (62%), Italy (39%), France (33%) and the Netherlands (24%), revealing that the industry is more concentrated in a few companies in the north. Future market perspectives foresee increased demand for organic products and new value-added products; however, it was also discussed at the workshop how organically produced mussels do not always fetch higher prices, making the value of investments in organic certification uncertain. The study

mentioned additional bottleneck factors that would restrict the growth of the sector, including the environment (whether natural variations, or other influences causing mussel mortalities or other economic losses resulting from periods of sales closures), the difficulty of obtaining licenses for new sites, the lack of professionalism and organization in the sector's structure, and the ability of some sectors to increase the valorisation of their products through marketing.

### Small companies, big potential

Maria Cozzolino from NISEA, an economic research institute specialising in fisheries and aquaculture, also presented an overview of the Italian mussel value chain. One of the main issues discussed at the workshop was the relatively small size of the Italian mussel companies that resulted in limited negotiation power when dealing with supermarkets. The presentation recommended that the Italian sector consider more vertical organization, so it could sell directly to the supermarkets with a much higher valorisation

and profit. Currently, in the French market, 82% of the organic mussels are sold in supermarkets, while in Italy, 65% of mussels is sold in supermarkets from wholesalers.

### Ideas for improvement going forward

During the afternoon, the stakeholders were very active in presenting their company's activities and views at the three roundtable discussions. In the workshop, the participants discussed bureaucratic procedures, certification, management, vertical integration and distribution, and room for future improvements.

One main issue discussed was the demand for market access. One producer of oysters had waited three years for the license to produce. By reducing the bureaucratic control, the licensing process could be made speedier. The banks also limited fish farmers, making it hard for them to get loans. The participants would like to have the same conditions for approving loans as the Italian agriculture sector. Moreover, they would like to see farmer

compensations between regions to be made fairer. Currently, those who lose their production due to weather conditions are subjected to compensations regulated by regional authorities that may vary from 0 to 90%. As the workshop concluded, stakeholders walked away with new market information and the opportunity to have expressed and discussed their views in a good atmosphere.

The meeting at Cattolica represented, for the Italian mussel sector, the first official meeting after they formed an association that would represent their needs and protect their interests. The atmosphere was extremely open to research as well as the exchange of professional experiences. Immediate impacts of the meeting have been a greater cohesion among the mussel producers and a higher interest in improving production performance. As a result, interest rates have risen both in the comparison of production costs and in the different value chains in the major mussel producer countries, such as Italy, France, Spain, and even Greece, an emerging producer among the four.