Research for PECH Committee - Small-scale fisheries markets: value chain, promotion and labelling

STUDY

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Abstract

The revised Common Market Organisation (CMO) is a great opportunity for small-scale fisheries (SSF) producers to better access the market and to compete successfully with imported fishery products. The aim of intervention is to give the consumer the opportunity to buy a fresh, safe, and environmentally-friendly product, and to guarantee an acceptable income to local SSF fishers.
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LIST OF ABBREVIATIONS

COFI  Committee on Fisheries (FAO)
CMO  Common Market Organisation
CSA  Community-Supported Agriculture
CSF  Community-Supported Fisheries
EU  European Union
FAO  Food and Agriculture Organization of the United Nations
GSSI  Global Sustainable Seafood Initiative
GTIS  Global Trade Information System
HACCP  Hazard Analysis and Critical Control Points
kg  Kilogram
KM  Kilometre
KM 0  KM 0 movement, buying from local producers
MSC  Marine Stewardship Council
OECD  Organisation for Economic Co-operation and Development
SSF  Small-Scale Fisheries
UK  United Kingdom
USA  United States of America
USD  US Dollar
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EXECUTIVE SUMMARY

Background

Total world fish production was 169 million tonnes in 2015, with the EU only contributing 4%. Total EU production is declining year on year. With regard to world food fish supply, a very interesting feature is that aquaculture overtook capture fisheries production as the main supplier in 2014. World per capita apparent fish consumption doubled from an average of 9.9 kg in the 1960s to 20.1 kg in 2015, of which 10.6 kg comes from aquaculture and 9.5 kg from capture fisheries. The per capita consumption in the EU is slightly higher than the world average at 23 kg.

International trade in fisheries products is important, in fact fish is the most widely traded food commodity. Total trade value was estimated at USD 130 billion in 2015, a 10% decline from the 2014 value due to lower exchange rates in the EU and Japan versus the US dollar. The EU represents about 30% of world fish imports. About half of the world fish exports originate in developing countries.

The value chain of fisheries products is complex, going from producers through various middlemen to the retailer or restaurant. Fish brokers and fish processors play an important role in the value chain. Estimates indicate that the primary producer (SSF fisher) only receives 10% of the final sales price of his product. This margin is far higher than for other food products. The shortening of the value chain is an initial vehicle to improving the income of the SSF fishers, but also of getting a better product (probably at a better price) to the consumer.

The importance of the various fish species groups in EU fish consumption has changed significantly over the 50 years under review. Back in 1961, about half of the fish consumed in the EU were demersal species, while pelagic fish accounted for about one third of apparent consumption. All other species groups were around 5% or less. In 2011, things have changed significantly: the share of demersal fish in total consumption has declined to 32%, and pelagic fish to 22%, thus the former dominators of the market now represent roughly half of apparent fish consumption. Freshwater and diadromous species have grown from 5% in 1961 to 16% in 2011, and crustaceans from 3% to 10%. The increase of these latter two groups is closely linked to the emergence of aquaculture production. The emergence of aquaculture products in the EU market has had an important impact on SSF fishers, as they find it more difficult to find a market, as products from aquaculture generally provide a lower-priced alternative to products from fisheries.

Net imports into the EU of fishery products (that is imports minus exports converted to live weight equivalent) have increased sharply during the last fifty years. In 1961, net imports were 650 000 tonnes while they reached almost ten times this figure, or 6.2 million tonnes. Likewise the share of net imports in total fish supply to the EU went up from 10% in 1961 to over 50% in 2011. Considering that not all the exports are coming from imports, it becomes evident that the dependence of the EU on imports for fish supply is even bigger.

There exists no statistical information on the distribution of fish consumption in the EU by processing type. When looking at the present distribution of fish species and forms of consumption in the EU, it becomes apparent that consumption of fresh or live seafood has increased. An estimated 60% of the total EU fish consumption is in fresh form. Some 20% of fish are consumed in canned form, 5% as cured fish and only 15% in frozen form. Overall the share of fresh fish is increasing, while frozen fish is going down. The preference
for fresh fish in the EU should open a door for SSF production, mainly supplying this segment of the market.

Small-Scale Fisheries (SSF) play an important role in the EU’s fish production, but it is generally very difficult to quantify its role. SSF are of great importance to the European Union (EU) in terms of job opportunities and contribution to the economy of coastal communities. It has been estimated that SSF represents one quarter of the catch value. The number of persons employed in EU SSF has been declining in recent years. In the late nineties, the number was about 200,000 people, while at present this figure is down to 120,000. However, the decline seems to have levelled off, and the numbers have been just about stable for some years now. **SSF represent about two thirds of all people employed in capture fisheries in the EU.**

SSF represent various advantages and challenges. The potential of promoting the image and the economic standing of SSF in the EU is great, but it needs a great deal of coordination between the main players, including the same SSF fishers. For anything to be successful and remain sustainable over time, needs to be market driven.

The revised Common Market Organisation (CMO) under the new Common Fisheries Policy is a great opportunity for SSF producers to better access the market and to compete successfully with imported products or with products from industrial fisheries. Various activities such as developing a statistical data bank for SSF in the EU, creation and maintenance of marketing associations, creation of specific market intelligence, creation of an SSF logo, criteria for SSF fishers to join, product labelling and promotion campaigns for SSF products could be carried out under the CMO umbrella. The main scope is to give the consumer the opportunity to buy a fresh, safe, and environmentally-friendly product and to guarantee a **good income for the local SSF fishers.**

**Aim**

The aim of this study is to analyse how the revised CMO can better inform consumers about the fishery product they are buying and how SSF could benefit from this consumer information drive.

The revised CMO under the new Common Fisheries Policy pays great attention to what happens on the markets after the fish is caught. Questions like the manner in which fisheries products are produced, labelled and sold requires, as usual, production adjustments, but they also have a great potential for improving food safety and consumer information, while fostering the development of regional product specialisations and commercialisation. The consultant was asked to identify the general context of fish consumption and trade in the EU. The study identifies areas on how the new CMO regulation can contribute to granting EU fisheries products more added value, at the origin, safer standards, and more and clearer information for consumers. Such contribution can be key to strengthening the promotion and presence of EU fisheries products on the markets, internal and external, and can also translate into increased work opportunities in the sector. Finally, the study should identify both opportunities and possible challenges offered by the new EU legal framework.

**Firstly,** the study gives an overview on fish species, production and consumption worldwide. **In the second chapter,** there is an identification of the different kinds of fisheries and aquaculture products that have market specificities in the EU for the purpose of the added value chain, and the role of promotion, labelling and consumer information.
The third chapter gives an overview on the importance of Small-Scale Fisheries (SSF) in the EU, and identifies this category as the main actor of local fish supply and potential beneficiary of dedicated promotional measures. The fourth chapter gives an overview on how the revised CMO under the new Common Fisheries Policy could contribute to granting EU SSF products more value added in the local market, safer products and better consumer information, while the final chapter gives conclusions and recommendations.
1. **GENERAL INFORMATION**

**KEY FINDINGS**

- Fish production reached a new record of 170 million tonnes in 2015
- Main species produced by capture fisheries for food supply are Alaska pollack, cod and skipjack tuna
- Share of EU in total world production is declining every year
- Aquaculture overtook capture fisheries in food supply in 2014
- World per capita fish consumption doubled from about 10 kg in the 1960s to 20 kg in 2015
- More than half of world fish production for human consumption is consumed in fresh form
- Value addition in fisheries means keeping the product alive or fresh
- Fishery products are the single most traded food product worldwide
- Highest value of a fishery product is reached with the lowest sophistication of the product, that is fresh or alive

### 1.1. Fish production worldwide

Overall fish production is forecast to have reached a record 168.6 million tonnes in 2015, boosted by a 5.0% expansion of aquaculture to 78.0 million tonnes, and a 0.7% increase in wild fish output to 90.6 million tonnes. Out of the wild fish production, about **16.4 million tonnes** goes to **feed production**, which means that food fish from wild catches is about 74.2 million tonnes, which indicates that aquaculture products have overtaken wild catches in food supply since 2014.

The main species produced by the capture fisheries for food supply are Alaska pollack, cod and skipjack tuna. Among the aquaculture products, excluding aquatic plants, the most important species are carp, which alone accounts for 30% of total aquaculture production. Tilapia (4.8 million tonnes), shrimps (4.4 million tonnes) and salmon (3.2 million tonnes) are also important species from aquaculture.

The EU share of world fish production is declining every year (3.9% in 2013 compared to 5.8% in 2003). Total **EU fish production** was reported at **6.3 million tonnes** in 2013, which compares to 7.3 million tonnes ten years earlier. **Spain** is by far the main fish producer in the EU, followed by the **UK, France and Denmark**.
1.2. Estimated fish consumption worldwide

World per capita apparent fish consumption increased from an average of 9.9 kg in the 1960s to 20.1 kg in 2015. The per capita consumption in the EU is only marginally higher than the world average at 23 kg. The impressive increase in world consumption of fish and fishery products has been driven by a combination of population growth, rising incomes and urbanisation, and facilitated by the strong expansion of fish production and more efficient distribution channels. In 2015, 9.5 kg of the consumed fish expressed in live weight equivalent was from capture fisheries, and 10.6 kg from aquaculture. In fact the surge in food fish supply in recent years has been exclusively from increased aquaculture production. Fish consumption is higher in developed countries than in developing countries. However, the latter have increased their fish intake in recent years.

A sizeable and growing share of fish consumed in developed countries consists of imports, owing to a steady demand and declining domestic fishery production. In developing countries, fish consumption tends to be based on locally and seasonally available products, with supply driving the fish value chain. However, fuelled by rising domestic income and wealth, consumers in emerging economies are experiencing a diversification of the types of fish available owing to an increase in fishery imports.

About 54% of world fish production for human consumption is consumed in fresh form, 24% in frozen form, 12% in cured form and 9% in canned form. Twenty years earlier, the respective figures were fresh 42%, frozen 31%, cured 13% and canned 15%. Two factors have played a part in the increased consumption of fish in fresh form: better logistics allowing fresh fish to reach the market in good condition and the increase of aquaculture production, which allows a steady supply to the market of fresh fish at the times of demand. In addition, the emergence of China as a key fish consumer and its preference for fresh or even live fish have also resulted in more fresh fish consumption. As will be discussed later, overall the EU consumption of fishery products is in-line with the world consumption, with more than half of the fish consumed being in fresh form, and with an increasing trend for this product form during recent years.

1.3. International trade and impact on fish supply

The fisheries market is a globalised market, and fishery products are the single most traded food product worldwide. It is estimated that almost 40% of the production enters international trade in one form or another. The total value of fish trade was estimated at USD 130 billion in 2015. World exports of fishery products is divided equally between developing and developed countries (in value terms) and interestingly this proportion has been the same for decades. From the importing side, however, the picture is different as about 80% of the world fish imports concentrate on the EU, the USA and Japan.

The EU is the largest importer of seafood in the world absorbing 24% of total world exchanges in value terms. Developing countries play an important role in the supply of fish to the EU market, with a share of 65% of the EU imports originating from outside the EU.

According to the FAO Fish Price Index, prices of fish in 2015 averaged 8% lower in the first six months of 2015 compared to the same period last year, largely reflecting a decline of 12% in the aquaculture sector and of 2% for captured fish. Across different species, shrimp prices are under downward pressure. Underpinned by a strong dollar, the US has been a

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1 These figures are for 2012- the latest information on world fishery production.
2 For statistical purposes live fish is included in fresh fish.
major destination of shrimp exports in 2015, while a weaker Euro prevented the EU from taking full advantage of reduced shrimp prices. Whitefish prices, particularly for cod, moved upwards, due to increased demand and reduced catches.

1.4. Value chain considerations for fishery products

The value chain for fishery products is quite complex, and Figure 1 is just one of the many ways of representing the value chain of fishery products. The value chain of fishery products is not much different from the one for other food products going from the producer (the fisher or the aquacultures), through the middlemen (fish processors, fish handlers, importers, exporters, brokers) to the client (supermarkets, fish mongers, restaurants, cafeterias, etc.).

![Figure 1: Example of a value chain in fisheries](image)

Source: Erik Hempel, Nepad – INFOSA, Value Chain Analysis, 2010

For all other food products, added value is created through processing the food and the more processing done, the higher the value of the food item. However, for fish this is not true. In fact the highest value of a fishery product is reached with the lowest sophistication of the product. For instance, live fish and shellfish are the most expensive product forms of seafood, while fresh fish is generally more costly than frozen fish or canned fish. This dissimilarity with other food items originates in the high perishability of seafood and it is fundamental to understanding the specificities of fishery products when compared to other food products. The main added value for a product from SSF can be reached when the product is made available to the market in the shortest time lag thus guaranteeing the greatest freshness. One important advantage of the local EU aquaculture industry, when compared with local fisheries, is that the aquaculturist can deliver upon request, while the fisher depends on the catch of at the time. Overall, however, the higher value of fresh fish in the market is an advantage for local producers, both from capture fisheries and from aquaculture. Generally the imported product is entering the market in frozen form, thus reaching a lower value market. The figure for frozen fish imports into the EU was 35% in 2014.
2. OVERVIEW OF THE CURRENT DEVELOPMENT IN EU FISHERIES

**KEY FINDINGS**

- EU fish production is 6 million tonnes
- 80% of total EU fish production comes from capture fisheries
- EU main fish consumption market in the world
- Consumption in the EU has reached a plateau of 23 kg, slightly ahead of world average
- Aquaculture accounts for about 40% of total fish consumed in the EU
- Imports represent more than 60% of fish consumed in the EU
- Labelling requirements of fishery products in the EU are complex
- Private eco labels mushrooming

2.1. Fish production by the EU

EU capture fisheries output was 4.8 million tonnes in 2013. EU catches are taken primarily in the north-east and eastern central Atlantic and in the Mediterranean, and are mainly made up of herring (500 000 tonnes), sprat (410 000 tonnes), and mackerel (380 000 tonnes). The leading fishing countries are Spain, Denmark, UK and France, who together account for more than half of EU catches.

European Union aquaculture produces around 1.27 million tonnes, 50% of which are bivalves. In fact, the main species produced are mussels (440 000 tonnes), followed by trout and salmon (about 180 000 tonnes each). The main producing countries are Spain, UK and Denmark. Spain alone accounts for about 20% of total aquaculture production in the EU. In Europe, aquaculture accounts for about 20% of fish production and directly employs some 80 000 people. EU aquaculture is renowned for its high quality, sustainability and consumer protection standards.

2.2. General overview of seafood consumption in the EU

The EU is the major consumption market of seafood products in the world with 12.3 million tonnes, representing EUR 52.2 million in 2011. The EU also occupies the first spot in expenditure for purchasing fish. The EU covers domestic consumption mainly through imports, the majority of which are either frozen or prepared products (canned tuna).
2.3. Per capita supply of fishery products to the EU

The average per capita supply of food fish to the EU was an estimated 23.2 kg in 2011 (according to the latest data available), which is 5% higher than ten years earlier. In 1961 the average fish consumption was 14 kg, so overall fish consumption in the EU has grown quite significantly over the years. However, Figure 2 also shows that the per capita fish consumption in the EU reached a plateau in 2007, and has not really increased very much since then. This stabilisation of fish consumption was created by the economic crisis in 2008 and the following years, which led to less expenditure on fish. Per capita consumption has not increased in all EU countries during the 2001-2011 period, in Czech Republic, Estonia, Germany, Greece, Ireland and UK the per capita fish intake declined during the period, and in Poland, Portugal, Spain and Sweden the apparent consumption stayed stable over these years. In total live weight terms, fish consumption in the EU was 11.8 million tonnes in 2011, which compares to 5.7 million tonnes fifty years earlier.

Figure 2: EU per capita food fish consumption

Traditionally fish consumption habits in the EU can be divided into five major consumption areas, the Northern European countries (3), the Mediterranean countries(4), the States bordering the Baltic Sea(5), countries bordering the Black Sea(6), and finally landlocked countries(7).

Fish consumption in the north-western area is characterised by a preference for cured products such as marinated herring or smoked fish. In this area, a preference for consuming small pelagic fish from the North Sea such as herring and sprats can be observed, but also a strong traditional preference for fillet consumption. The per capita fish intake is not very high, at about 20 kg. France is the exception with a consumption of almost 35 kg, but this country is really divided into two with the northern part having a

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3 Belgium, Denmark, Finland, France, Germany, Ireland, Netherlands, Sweden, and UK
4 Italy, Malta, Spain and Portugal
5 Estonia, Lithuania, Latvia, and Poland
6 Bulgaria and Romania
7 All others
lower per capita consumption while the south has all the characteristics of the high Mediterranean fish consumption.

The Mediterranean countries have a traditional preference for head-on fish and head-on shrimps, and for fresh fish products in general, while smoking plays a very limited role. A special consideration goes to the consumption of wet salted or dried cod, which has a strong presence in Portugal, Italy and also in Spain. This consumption dates back to the eighteenth century, when trade links were established with Norway for this product. In Mediterranean countries, consumption patterns of all seafood are different from the rest of the EU, which also includes cephalopods, with relatively high consumption, especially when compared to the other EU countries. In this area, fish consumption is relative high, and the two main fish consumers (Spain and Portugal) are in this area with consumption exceeding 40 kg. However, the other countries in this area also have a consumption exceeding by far the European average.

The Baltic Sea countries have a strong preference for species available in the Baltic Sea, such as cod, sprats, and herring. In the years after the Second World War, the Baltic States and Poland had an important industrial fishing fleet providing the home country with frozen fish such as hake and Alaska pollack. Per capita consumption is low in Poland and Estonia, while Lithuania and Latvia lie above the EU average.

The countries bordering the Black Sea had similar experience with industrial freezer fleets. Overall, the consumer preference is for freshwater species and consumption patterns are similar to that of neighbouring landlocked countries. The average per capita consumption is around 6 kg, which is really low when compared with the EU average.

Fish consumption in landlocked countries is traditionally low, and goes from 5 kg in Hungary to 14 kg in Austria. Although, consumption of fish has been increasing over recent years, on the wave of globalisation and the positive health considerations of fishery products. Traditionally in these countries, eel and carp were the preferred species, but nowadays also shrimp and Alaska pollack have become important items of consumption.

The importance of the various fish species groups in EU fish consumption has changed significantly during the 50 years under review. Back in 1961, about half of the fish consumed in the EU were demersal species, while pelagic fish accounted for about one third of the apparent consumption. All other species groups were around 5% or less. In 2011, things had changed significantly: the share of demersal fish in total consumption had declined to 32%, and pelagic fish to 22%, thus the former dominators of the market now represent roughly half of the apparent fish consumption. Freshwater and diadromous species have grown from 5% in 1961 to 16% in 2011, and crustaceans from 3% to 10%. Molluscs, excluding cephalopods (this means mainly bivalves), grew their share from 5% to 12%. It has to be noted that most of the species grouped in these three clusters are from aquaculture, which in fact is the main driver behind the increase in consumption of seafood in the EU.
The composition of fish consumption in the EU has changed significantly over the years, the event of aquaculture, though not specified in the consumption estimate that FAO produces, has had an important impact on fish consumption. Thus, the consumption of freshwater and diadromous species (mainly salmon and trout), has grown greatly from less than 1 kg in 1961 to almost 4 kg in 2011. In 1961, consumption of fish species from aquaculture was less than 10% (Graph 4), while in 2011, this estimated share had increased to almost 40%. This shift in consumption, and also in view of the fact that consumption has not grown proportionally to the emergence of aquaculture as a key supplier of fishery products to the
EU market, has had a severe impact on fisheries in the EU. Fishermen find it more difficult
to find a market, as products from aquaculture provide generally a lower-priced alternative
to products from fisheries(8).

Figure 5: Per capita consumption in the EU by fisheries versus aquaculture 1961

Source: calculations by the author based on FAO

Figure 6: Per capita consumption in the EU by fisheries versus aquaculture 2011

Source: calculations by the author based on FAO

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8  In Annex I time series for EU fish consumption are given by species group.
2.4. Dependence of the EU fisheries market on imports

Net imports into the EU of fishery products (that is imports minus exports converted to live weight equivalent) have increased sharply during the last fifty years. In 1961, net imports were 650 000 tonnes while they reached almost ten times this figure, or 6.2 million tonnes in 2011. Likewise the share of net imports in total fish supply to the EU went up from 10% in 1961 to over 50% in 2011. Considering that not all the exports are from imports, it becomes evident that the dependence of the EU on imports for fish supply is even bigger. However, an interesting fact shows that the dependence on imports has somehow reached a plateau during the last five years or so.

Some EU countries are dependent on imports for more than 80% of their fish intake, such as some of the landlocked countries. However, some of the Mediterranean countries are also heavily depending on imported products for their fish intake. For instance in Italy almost 70% of the consumed fish is from imports.

![Figure 7: Share of net imports in the total fish supply in the EU](image)

**Figure 7: Share of net imports in the total fish supply in the EU**

Source: unpublished information FAO food balance sheets

2.5. Products from imports

As mentioned before, imports of fish and fishery products play an expanding role in fish supply to the EU. Total live weight equivalent of imports is around 14.7 million tonnes, thus exceeding total consumption in the EU. Nevertheless, the composition of EU fish imports is interesting to analyse. In 2014, about 35% of the fish (live weight) imported into the EU were frozen fish (a slight decline from the 37% reported for 2009). Canned fish and fresh fish products had the same percentage of 18% in 2014, for both a slight increase from the 2009 figure of 16%. Crustaceans had an overall stable percentage of 8% in the supply of imported products to the EU market.
The main category of imported fish into the EU is the frozen form. In 2014, this category reached about 5.1 million tonnes \(^9\), a slight increase from the 5 million tonnes reported for 2009. The main group of products are frozen fillets with 3.6 million tonnes, a quantity which stayed stable over the six years under review. Fresh fish imports increased far more than that of frozen products, reaching 2.6 million tonnes in 2014, 15% more than in 2009. Imports of crustaceans stayed surprisingly stable at 1.2 million tonnes, while molluscs and cephalopods experienced a decline.

\(^9\) In this paragraph, all quantities are expressed in live weight equivalent.
Table 1: Total EU imports (live weight equivalent - 1000 tonnes) by main product forms

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Source: calculations based on GTIS

2.6. Fish consumption in the EU by processing type

There exists no published or unpublished information on the distribution of fish consumption in the EU by processing type. However, some estimates can be made by looking at the types of products that are imported and exported and by the types of products that stay inside the EU. When looking at the present distribution of fish species and forms of consumption in the EU, it becomes apparent that consumption of fresh or live seafood has increased. The roughly 40% of species consumed in the EU are from aquaculture and are consumed in fresh or live form. Aside from imports, some 2 million tonnes of whole fish and an additional 0.8 million tonnes of fresh fillets (live weight equivalent) enter the market. In addition, more than 1 million tonnes from capture fisheries in the EU are also consumed in fresh form, which gives an estimated 60% of the total EU fish consumption in fresh form. Some 20% fish are consumed in canned form, 5% as cured fish and only 15% in frozen form. Overall the share of fresh fish is increasing, while frozen fish is going down, when looking at the past decade or so. The apparent preference for fresh fish in the EU should open a door for SSF production, mainly supplying this segment of the market.

2.7. Legislation for fish sales in the EU

Regulation (EC) No 852/2004 of the European Parliament and of the Council of 29 April 2004 on the hygiene of foodstuffs governs the direct sales of fish and fishery products in the EU, including fishery products. This legislation allows the direct sale from the producer (in our case the SSF producer) to the consumer. All the established principles of safe food production and sales are applied. This Regulation makes reference to various previous regulations, including the Hazard Analysis and Critical Control Points (HACCP) principle, traceability principles as laid out in Regulation (EC) No 178/2002 of the European Parliament and of the Council of 28 January 2002 laying down the general principles and requirements of food law, establishing the European Food Safety Authority and laying down procedures in matters of food safety. In addition, Regulation (EU) No 1169/2011 on food information to consumers of the European Parliament and of the Council of 25 October 2011 is applicable, which requires that fishery products on sale should include the following:

Small-scale fisheries markets: value chain, promotion and labelling

- commercial and scientific name of the species
- production method (‘…caught…’ or ‘…caught in freshwater…’ or ‘…farmed…’)
- area where the product was caught / country and body of water where the product was farmed
- category of fishing gear
- whether the product has been defrosted (with some exceptions)
- ‘Date of minimum durability’ (‘best before’ date) – where appropriate (e.g. frozen fillets)

In addition, pre-packed products must also display all the relevant information specified in Articles 9 and 10 of the FIC Regulation, where necessary:

- list of ingredients
- any ingredient or processing aid causing allergies or intolerances
- quantity of certain ingredients or categories of ingredients
- net quantity of the food
- any special conditions for storage and use
- ‘use by’ date for products for which the ‘best before’ date is not appropriate (e.g.: fresh fillets)
- name or business name and address of the food business
- country of origin or place of provenance
- instructions for use (if needed)
- nutritional information (if required)

Regulation (EU) 1169/2011\(^{(13)}\), is a substantial change from the previous labelling requirements, especially with regard to the ‘best before’ date or the ‘use by’, which were not required for fishery products. ‘Best before’ date / ‘Use by’ date: The date of minimum durability corresponds to the ‘best before’ date or ‘best before end’ date. All prepacked products which are not highly perishable must display the ‘best before’ date. By contrast, highly perishable products should display the ‘use by’ date. For all non-prepacked products, products prepacked for direct sale or on sales premises at the consumer’s request, EU countries can decide whether to adopt national rules stipulating that the ‘best before’ or the ‘use by’ date should be displayed. For live bivalve molluscs, the ‘best before’ date can be replaced by the label ‘these animals must be alive when sold’. Figure 10 shows an example of the new label for a yellowfin tuna for sale in Italy.

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Additional Regulations on the marketing of fishery products in the EU:


It should be noted here that the label can be confusing, when the fish is caught in Spanish waters for instance in Sub-Area FAO-27, designated as ‘Portuguese Waters’ it could confuse Spanish consumers. Similar problems can happen with other FAO sub-areas, which in fact were created more than seventy years ago to report catches and not for consumer information purposes. Still the information on the FAO areas is compulsory on the label.

2.8. Private labels for fishery products in the EU

There are several private labels existing in the EU, which mainly promote the environmental aspects of fishery products, in particular that the fish are from well-managed fisheries and that the species is not overfished. The first ‘green stamps’ were launched in the early nineties in the USA. They focused on a specific by-catch issue, such as the dolphin by catch by tuna seiners (dolphin safe), or the turtle by catch of shrimpers (turtle
safe). In 1997, a public awareness-raising campaign in the USA ‘give swordfish a break’ turned out to be the first widespread campaign asking consumers to help to have an impact on fishing practices. In 1997, the Marine Stewardship Council (MSC), today the world-leading ecolabel was created. In the following years, other labels certifying environmentally-friendly practices came on to the market. The figure below shows the large number of labels existing in the EU, which is rather confusing for the consumer.

**Figure 11: Ecolabels for seafood products in the EU**

![Ecolabels for seafood products in the EU](image)

In 2005, in order to provide an equal playing field for all eco-labels, the FAO adopted ‘The Guidelines for the Ecolabelling of Fish and Fishery Products from Marine Capture Fisheries’\(^{(15)}\). Ecolabelling has been discussed in the FAO since 1997.

As seafood production has increased to meet rising global demand, so have the concerns of members of the seafood supply chain, consumers and environmental NGOs on the impact that production is having on the environment. One way of providing assurances of more sustainable practices, in both aquaculture production and wild capture fisheries, is the use of seafood certification schemes. However, the increase in schemes has led to confusion among producers, retailers and consumers on how to recognise a credible seafood certification scheme. This confusion is making decision-making more difficult, and seafood more costly, for everyone. A recently created initiative, the Global Sustainable Seafood Initiative (GSSI)\(^{(16)}\), created a Global Benchmark Tool for seafood certification schemes, based on the FAO Code of Conduct for Responsible Fisheries and the FAO Guidelines on Ecolabelling. This Tool comprises seven steps:

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14 The detailed list of seafood ecolables used in the EU is reproduced in Annex III.
• The submission of application and supporting documentation by the certification scheme
• Preliminary review by Independent Experts
• An Office Audit and Desktop Review by Independent Experts
• Review by multi-stakeholder Benchmark Committee
• Stakeholder consultation
• Recognition decision by Steering Board
• Monitoring of compliance of recognised schemes on a regular basis

As it is still in an early stage of implementation, the cost of applying the tools is still unknown, but should not be too high.

GSSI objectives are: to provide an international multi-stakeholder platform for collaboration and knowledge exchange in seafood sustainability; to develop an internationally agreed set of requirements and indicators to measure and compare the performance of seafood certification schemes, in order to facilitate their implementation and use, to build, operate and maintain a common, consistent and Global Benchmark Tool for seafood certification schemes; and to reduce costs by eliminating redundancy and improving operational efficiency of seafood certification schemes, thereby increasing affordability and flexibility within the supply chain. GSSI will not undertake any accreditation or certification, develop or own any standards, rank certification schemes or define sustainable or responsible seafood. Any labelling of fisheries products under the CMO should work together with GSSI to develop an acceptable label. At the moment, GSSI is financed mainly by the German government.

In Regulation (EU) No 1379/2013 of the European parliament and of the council of 11 December 2013 on the common organisation of the markets in fishery and aquaculture products, amending Council Regulations (EC) No 1184/2006 and (EC) No 1224/2009 and repealing Council Regulation (EC) No 104/2000, there are 22 references to ecolabels: ‘The use of an eco-label for fishery and aquaculture products, whether or not they originate from inside or outside the Union, offers the possibility of providing clear information on the ecological sustainability of such products. It is therefore necessary for the Commission to examine the possibility of developing and establishing minimum criteria for the development of a Union-wide eco-label for fishery and aquaculture products’.
3. A CASE STUDY ON SMALL-SCALE FISHERIES PRODUCTS IN THE EU

**KEY FINDINGS**

- Small-Scale Fisheries (SSF) plays an important role in fish production in the EU, but is difficult to quantify
- One quarter of EU production in value terms comes from SSF
- About 60% of employment in fisheries in the EU is in SSF
- SSF in an ideal position to provide the consumer with fresh and high quality fish
- Market concentration and cheap imports are threatening SSF

3.1. Small-scale fisheries key to implementing the CMO in the EU

Two categories of fisheries can be identified in the EU: industrial and small-scale fisheries. While industrial fisheries have received subsidies, over the years, of about EUR 14 000 per boat in the 1990s, but far less in this century, SSF have rather been overlooked. As this study was asked to identify areas where the CMO could make an important impact in order to grant EU fisheries products more added value at the origin, safer standards and more, clearer information for consumers, the SSF category can be clearly identified as the best choice in order to promote the development of regional product specialisations and marketing. The SSF sector can be key to strengthening the presence of EU fisheries products of excellent quality on the markets. The CMO could, therefore, also translate into increased work opportunities in the sector, which has lost about 80 000 units or 40% of its workforce during the last twenty years.

3.2. Importance of small-scale fisheries in the EU

Small-Scale Fisheries (SSF) play an important role in the EU’s fish production, but it is generally very difficult to quantify its role. The sector is of great importance to the European Union (EU) in terms of job opportunities and contribution to the economy of coastal communities, especially in relatively isolated areas and on islands. It has been estimated that SSF represents one quarter of the catch value (Guyader et al., 2013). It is very difficult to quantify how much fishery products landed in the EU are originating from SSF. It is impossible to say that a species is exclusively from SSF or exclusively from industrial fisheries, with the exception of tuna. A squid, a herring or a cod can be landed by both fleets.

However, some generalisation is possible with regard to product forms and market channels. Products from the industrial fleet are generally frozen and used as a raw material, in conjunction with imported raw material, in the fish processing industry. Products from SSF are generally feeding the fresh fish market and are sold close to the landing place. Logistics are generally poorly developed for distributing SSF products, and the fish generally stays within 50 km of the landing site.
SSF are generally composed of smaller vessels, and are more reliant on coastal areas. Crews on vessels are smaller. SSF are more selective, costs are generally lower, and vessels have lower fuel consumption, making them less sensitive to changing fuel prices. In fact the relative increase of the share of SSF fishers in the total number of fishers shown in Figure 12 below can be explained by the higher fuel efficiency of SSF when compared to the industrial fleet. In addition, recent years have seen an overall reduction of subsidies to the industrial fleet in the EU, which led to a reduction in the number of industrial fishing vessels, leading to lower employment and lower output of industrial fisheries in the EU’s overall fisheries production.

3.3. Employment in the SSF sector

Employment figures are difficult to obtain and time series are almost impossible. This is true for all type of fisheries. FAO statistics on employment are not complete and, in fact, are not published. The Organisation for Economic Co-operation and Development (OECD) also collects employment statistics, which are interesting and have been used for the purposes of this report(17). However, these figures are also far from being perfect.

It is even more challenging to identify small-scale fishermen in any data series. One key problem is connected to the lack of a common definition of small-scale fisheries or of small-scale fishers. In the recently adopted Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication (the SSF Guidelines) it says (Para. 2.4): ‘These Guidelines recognise the great diversity of small-scale fisheries and that there is no single, agreed definition of the subsector. Accordingly, the Guidelines do not prescribe a standard definition of small-scale fisheries nor do they prescribe how the Guidelines should be applied in a national context...’(18). In addition, it is important to distinguish between fisheries and aquaculture, and to keep in mind that aquaculture plays an important and increasing role in the production and supply of fishery products in the EU.

Employment statistics are very difficult to obtain, especially for SSF. As mentioned above, the definition of small-scale fisheries is far from being uniform, not even within the EU. The graph below summaries estimates from the OECD statistics with some adjustments made by the author, such as creating estimates for years where numbers were missing, for the UK counting those that fish with smaller boats as fishers, or including all inland fishers as small-scale fishers. Despite the weaknesses in the data, it became apparent that the number of persons employed in the EU’s SSF have been declining in recent years. In the late nineties, the number was about 200 000 people, while at present this figure is down to 120 000. However, the decline seems to have levelled off recently, and the numbers have been just about stable for some years now.

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17 It also has to be noted, that only 19 of the 28 EU Member States are covered by the OECD statistics.
The share of the number of total SSF fishers is around 50-66% of total labour force working in the capture fisheries of the EU. Some increases and decreases are shown in Figure 13, but these can also be explained by the rather weak data base.

### 3.4. SSF fishers’ organisations

Producers’ organisations are made up by fishermen and fish farmers who choose to join together to take measures aimed at ensuring a rational approach to production and creating the best possible conditions for marketing their products. They are a fundamental part of the common organisation of the market in the fisheries and aquaculture sector. In 2013, there were 232 producers’ organisations in 17 EU Member States, while 12 Member States did not have any such organisation. Out of the 232 organisations, 188 were of SSF fishers, while the remainder were aquaculture associations. The greatest number of organisations of SSF fishers was in Italy (39), Spain (33), France (24) and UK (21), pretty much in-line with the size of SSF in these countries. These organisations provide a great opportunity to promote coherent market actions for the SSF sector, in-line with the CMO as described in Chapter 4.
3.5. **SWOT analysis on the performance of SSF in the EU**

The following table (Table 2) highlights the key aspects of SSF in the EU, the opportunities and threats for the sector as a whole. Overall it becomes apparent that the sector has evolved over the past decades to become a more professional sector. There has been a substantial shake-out of players during the years, due to various aspects such as high fuel costs, dwindling resources and catch restrictions. What is left after this shake-out process is a vital sector that has learned from past mistakes, and is potentially in an ideal situation to satisfy a sophisticated market, in times of increasing health and environment consciousness.

**Table 2: SWOT analysis of SSF in the EU**

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshness of products</td>
<td>Market driven distribution, not social driven</td>
<td>Myths of Fishermen (freedom, independence)</td>
<td>Disappearing occupation – parallel with other jobs that have disappeared</td>
</tr>
<tr>
<td>Quality</td>
<td>Youngsters and Fish consumption</td>
<td>Information for consumers on SSF products</td>
<td>Imported products</td>
</tr>
<tr>
<td>Authenticity</td>
<td>Well-established market channels</td>
<td>Promotion campaign targeted to SSF</td>
<td>Selling one product for another</td>
</tr>
<tr>
<td>KM 0 movement</td>
<td>Sanitary problems of direct sales</td>
<td>Institutions to be selected for campaign Agriculture Education health</td>
<td>Price of local products versus imported</td>
</tr>
<tr>
<td>Wild versus aquaculture</td>
<td>Logistics</td>
<td>Develop logo for SSF</td>
<td>Too much publicity on social aspects already</td>
</tr>
<tr>
<td>Variety of species</td>
<td>Supermarkets</td>
<td>New legislation for direct sales</td>
<td>Difficult to enter new markets or promote new logos in a sophisticated market</td>
</tr>
</tbody>
</table>

*Source:* Calculations and estimates by author based on unpublished OECD figures.
### Strengths

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taste</td>
<td>Market dependent on imports</td>
<td>Guarantee of freshness and quality</td>
<td>Complex legal system (see Chapter 2.7) regulating direct sales of fishery products by SSF producers</td>
</tr>
<tr>
<td>Associations</td>
<td>Associations</td>
<td>Network of SSF – also a starting point for health controls</td>
<td></td>
</tr>
<tr>
<td>Restaurants</td>
<td>Dangerous job</td>
<td>Cooking lessons on TV</td>
<td></td>
</tr>
<tr>
<td>Specialisation</td>
<td>Too individualistic</td>
<td>Co-management of fish resources with administrations and EU</td>
<td></td>
</tr>
<tr>
<td>Individual market intelligence</td>
<td>Income uncertain</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complexity of products</td>
<td>Fish stock dwindling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special occasions for fish consumption</td>
<td>Special occasions for fish consumption</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spirit of Tradition</td>
<td>Spirit of Tradition</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Myth of Fishermen</td>
<td>Myth of Fishermen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Romanticism of Fisheries</td>
<td>Romanticism of Fisheries</td>
<td></td>
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</tr>
</tbody>
</table>

**Source:** author

### 3.5.1 Strengths

The strength of SSF in the EU is manifold. The consumer is demanding freshness, especially in those markets where there exists a good traditional knowledge of fish products, such as the Mediterranean market. SSF, in principle, can guarantee the freshness of the product, the quality, **the authenticity** of the product. For other products, especially from the agriculture sector, the KM 0 movement, that is to favour local products over products transported from far away, has been successful. SSF, which are mainly selling to nearby consumers and restaurants, could easily be associated with this movement. In all markets, and especially in those markets where the consumer has a knowledge of fish and seafood, fish from capture fisheries has a higher price and a better image than aquaculture products. As SSF products in the EU are all capture fisheries products, this stream of preference could be expanded.

Restaurants, especially in tourist areas, should be encouraged to promote local fish products from local SSF. Tourists are definitely visiting these restaurants to eat a local fish rather than an imported species. Specialisation of the rather sophisticated market is also a strength of SSF, which can target individual preferences. Nowadays, fishermen already have individual market intelligence, which should be expanded. Fish is one of the most
diversified food products, and each species allows for a whole range of recipes, this complexity plays in favour of SSF.

Another important strength of SSF is the myth of fishermen and the romanticism of fisheries as a whole, as one of the last individualists in the food production chain. This strength also includes the spirit of tradition in EU countries becoming more important over time, and the idea of protecting traditional occupations in a world of globalisation.

### 3.5.2 Weaknesses

Weaknesses of SSF are also important. First of all, SSF is an activity that in the EU hardly any father wants to pass on to his son. It is a dangerous job, and not an easy job. Income is variable and uncertain. Expenses have been increasing in recent years, while fish stocks have declined, resulting in lower catches per boat or fishermen. The very character of SSF fishermen in the EU – and in the rest of the world, as well – is individualistic. Thus, associations have not had success, with some exceptions. As a result, the ability to react to a concentration of market forces has been feeble.

The overall market concentration, and the emergence of supermarkets – just to give an example, in a country like Spain the role of fishmongers in fish marketing has declined from over 60% ten years ago to less than 20% at present – has a negative impact on SSF. Supermarkets want the same size, the same quality, and have little room for ad hoc arrivals of products. The whole centralised logistics system of supermarkets plays against SSF products. As a result, supermarkets prefer a standardised product, which can be salmon steaks from aquaculture in Norway or pangasius fillets from Vietnam, rather than dealing with the local production from SSF.

Since 2004, direct sales from the producers of food products to the consumer are, in general, allowed in the EU, provided that all the health, traceability, labelling and other legal standards are complied with. This issue creates a problem to the individual fishermen as he should be able, for instance, to prepare a HACCP plan for his products, something which is not so easy to implement.

### 3.5.3 Opportunities

Consumers are especially interested in the health aspects of food products, and this point plays in favour of SSF in two ways. It is demonstrated that fishery products are good for our health, especially in reducing the risk of strokes. Therefore, in the coming years will see more intensive promotion of the benefits of fish consumption in general. Biological products are increasing their market niche in the EU, and this can create an important niche for SSF products. KM 0 is a movement that shows timid signs of presence in the market place, and this provides a good opportunity for SSF fishermen.

The sector could receive a revival through a different way of preparing and selling the fishery products, which could attract newcomers into the sector, or convince older SSF fishers that the work of SSF fishers could also be attractive to the younger generation. In some rural areas there is a return of young people to become farmers, as a result of a change in mentality, being more receptive to biological and environmentally-sustainable agriculture. Something similar could happen to the SSF sector, provided that the direct marketing of fishery products is implemented and the image of SSF products in the minds of consumers is improved.

**Organic certification** of fishery products is an important opportunity, though at present only aquaculture products can be certified as ‘organic’. This is due to the fact that nobody
can control the food intake of wild fish populations. However, a different type of labelling could be possible, including the ‘wild’ aspect versus ‘cultured’ aspect. Something similar has already been carried out for years for cattle from Argentina versus cattle from mass production in the EU.

Co-management of fisheries resources is a great opportunity for SSF fishers to ensure that the resource on which they depend is well managed, but it is also a challenge as it needs a change in mentality, that is collaboration between fishers on one hand, and collaboration between fishers and the official administration, rather than go for the ‘hit and run’ approach, which is the traditional mentality of fishers in EU waters, especially in the Mediterranean area.

In the wider context, a consumer information campaign could be started, through various EU and national institutions, including health Ministries, education ministries, etc. Television schedules are full of cooking seasons and lessons, and some star cooks could be involved in promoting SF fisheries products. Overall the difference between fishery products from aquaculture versus products from capture fisheries could be highlighted, similar to free-range cattle compared with stable cattle. By eventually preparing a logo for promoting SSF products, the myth of the SSF fishermen could be used. At present the myth of the captain on a fishing boat is already used to promote fish fingers, which do not really come from the boat in the advertisement.

**3.5.4 Threats**

The main threats to SSF in the EU are dwindling fish stocks, but management seems to be successful, and hopefully production by SSF will become sustainable from a use-of-resources point of view. The main threat to fisheries products from SSF is **cheap imports of aquaculture products**. Another important threat is the change in food habits. The younger generation is influenced by fast food habits, including take away food, which is not in-line with production from SSF.

Another key threat to the economic viability of SSF is competition from **low-priced imported** products, such as cheap tilapia or pangasius. Red meat is not a competitor as meat consumption is decreasing due to health considerations.

Several recent studies have shown that the information provided to the consumer is not very good, especially in restaurants where some lower-value species are sold under the name of another species - generally a species from local SSF. It is not easy to control the authenticity of a cooked fishery product, and this sophistication really threatens SSF, both in economic terms and in terms of image. The disappearance of traditional jobs is a reality in the EU, and SSF might go the same way. Publicity based on social aspects is not very successful, and should not be the way to go. The food market in the EU is already very sophisticated, the consumer is **tired of logos and publicity**, and therefore it is difficult to enter this market with new initiatives, such as the SSF promotional logo.

**3.5.5 Conclusions**

The potential to promote the image and the economic standing of SSF in the EU is great, but it needs greater coordination between the main players, including the same SSF fishers. The success comes from sustainable measures, not from protectionism. Any specific action aimed at improving the performance of SFF fisheries in the EU’s fish value chain needs to be market driven.
National governments and local governments have carried out promotional campaigns for certain fishery products in the past. For instance, the Spanish national government’s campaign for the consumption of small pelagics and the Italian government’s campaign for anchovy consumption. Many years ago the regional government of Catalonia started a local promotional campaign for blue fish (Peix blau consumption), which led to a festival and a special quality logo in Tarragona. While this latter campaign has been very successful, the promotion of small pelagic consumption in Italy and Spain were successful during the period of the campaign, but everything came to a stop once the campaign was over. With regard to the promotion of small pelagic and the positive health aspects of fish consumption, nowadays private companies, websites and information services are in the forefront rather than national governments or the EU.

Dedicated promotional campaigns should avoid mistakes made in the past, such as a drop in interest once the project funding has come to an end. The promotion of SSF fisheries has to be economically viable, guaranteeing a well-priced product of outstanding quality. The envisaged promotional activity for SSF fisheries should also work together with private initiatives to promote local food products. Very important in this respect is the slow food/slow fish initiative which, for several years, has been dedicated to traditional food products and traditional food production value chains. Slowfish organises biennial events in Genova as a meeting and discussion place for all stakeholders in the EU and beyond. The Slowfish initiative goes beyond the EU, but could be an excellent partner for the promotion of EU SSF fisheries.

3.5.5.1. Economic

In order to be sustainable over time, any promotional activity of SSF and their products has to be based on economic principles. An interesting type of promotion of SSF products was experienced in the USA (described in more detail in Appendix II below). This experience involved four ways of purchasing local seafood from SSF fishers: community-supported fisheries, farmers markets, dock pickups or boat-to-school.

Community-supported fisheries is probably the most interesting and replicable model. Under this scheme, customers pre-pay for a ‘season’ of fresh, local and low-impact seafood, and in turn they receive a weekly or bi-weekly share of fish or shellfish. This activity also has the beneficial side-effect of strengthening the relationship between fishers and communities.

The farmers’ market is a well-known way of direct marketing, also known in the EU. In this model, a group of fishers will sell their products once or twice a week.

Another possibility is direct pickups at the dockside. This fish is fresh and in season, however, health aspects might be difficult to handle well. Similar sales are already done in harbours by SSF fishers all over the EU.

The boat-to-school model links fishers to school cafeterias. This initiative goes hand-in-hand with school information and lessons on the health aspects, but also on cultural and historical aspect of SSF fishers.

3.5.5.2. Environmental

The SSF fishers know their resource and its environment very well, so the role of SSF fishers can be well-integrated into the management and the protection of the resources and the environment. The beneficial impact of SSF fisheries on the environment should be
strengthened though market-based interventions. The action plan will guarantee a greater dialogue between authorities and fishermen for the benefit of resource management.

3.5.5.3. Social

SSF fishers and their families play an important role in their communities. Promotion of SSF will help to maintain a good equilibrium in coastal communities. In most of the EU countries, the traditional communities are part of a tourism industry, which could be an important resource to the SSF social environment. Dedicated fishing excursions could help the income of SSF fishers, but also give tourists an idea of SSF. In addition, local restaurants should be encouraged to promote locally-produced fishery products, very much in-line with what tourists expect from local restaurants. The social aspect of promoting SSF fishers and their traditions could be an interesting part of tourism promotion for a coastal area in the EU.

3.6. Specific activities needed to promote SSF

3.6.1. Development of a specific logo

The movement of SSF fishers’ organisations should be helped with the development of a dedicated logo which guarantees: a fresh fish product, excellent quality, controlled health standards, compliance with km 0 requirements (that is, favouring local products over products transported from far away), close to consumers, in-line with traditions, etc. The design of such a logo and the specific promotional techniques to make it well-known by consumers go well beyond the scope of this study and would need specific financial and human resources inputs.

3.6.2. Consumer information

Consumer information is on different levels. One level includes information on the potential health benefits of fish and fishery products. In addition, it would be useful to provide consumers with some simple information on the freshness of fish. Finally, information could be provided on locally-produced fish, which species are available locally, the presence of local fishermen and how to access their products.

3.6.3. Shortening the value chain

In the fishery products value chain there are generally many intermediaries. The value chain is far more complex than what is really required. The organisation of SSF into marketing associations will help to shorten the value chain.

19 Slowfood.com/slowfish.
As shown in Figure 14 above, sales would go straight from the fishing vessel (the SSF fishers) to the retailer or even directly to the consumer, who can be a restaurant owner or a household. On average, the margin in the value chain is that only 10% go to the producers, and the remaining 90% are for the intermediaries in the value chain, who obviously have costs for storage and risks, but it becomes evident that by shortening the value chain, the fish can reach the consumer quicker in a better shape. The 90% margin to the intermediaries could be nicely divided among the producers and the consumer, with 30% more gain for fishers, 30% lower prices for consumers, and the remaining 30% going to the logistics and maintenance of the marketing structure and organisation at the SSF level, including health controls.

3.6.4 Use of modern technology

The advent of internet and social networks makes direct sales possible and relatively easy. The example from the USA shows that direct sales by SSF can be organised in an efficient way, far better than traditional fish trade systems. The additional benefit of using modern technology is the reduction of post-harvest losses, as the production can be organised around consumer demand. In the US example, the customer pays for one week catch of the day which makes the fishing by fishers more organised and secure. Obviously, the customer will be informed, again through the use of modern technology, if there are problems with the catch, such as bad weather conditions or the like.

An interesting example of the use of modern technology in fish sales is represented by a model in the UK (https://www.fishforthought.co.uk/cockles-to-buy.html) where customers can buy direct and also receive recipes for using the seafood purchased. The webpage presents the family business and the supplier of each seafood product with his/her story. The strong points are also the presentation of traditional fish products, such as oak-smoked kippers or smoked salmon. The production method is highlighted as environmentally-sound and sustainable. A price-back guarantee is given in case the customer is not satisfied. There is a strong local link, as is the case already in Cornwall and its long-standing fishing tradition is highlighted. All these elements make the ‘Fish for Thought’ a worthwhile initiative that could be replicated in other parts of the EU.
One important consideration when looking at the direct sales from SSF fishers, whether through websites, direct sales at the landing site or at farmer markets, etc. is the sales of bivalves. The EU regulation on bivalves\(^{(20)}\) specifies that all bivalves have to come from controlled areas and have to undergo depuration. As these requirements are quite complex, bivalves should be excluded altogether from the direct sales by SSF fishers, in whatever form these are to be carried out.

### 3.6.5 Direct sales

Direct sales at a landing site or an organised place that customers get to know, are a good way of promoting fresh fish from SSF. In other parts of the world, these direct sales are organised together with small restaurants or bars, where generally the wives of the SSF fishermen are preparing the fish in a traditional way. There is an excellent opportunity to also take advantage of tourist business in coastal areas, especially in the Mediterranean Sea.

### 3.6.6 School information

The school package is similar to the direct information to consumers, including health benefits, types of species, etc. Some romantic description of the life of fishers, all prepared for the specific target which is school-aged kids. Direct preparation of fish products in the school cafeterias could also be a part of this package.

### 3.6.7 Access to supermarkets

Access to supermarkets is one of the main problems of SSF at present. Traditional fishmongers have disappeared, or at least their presence in the markets has shrunken in recent years. Some figures from Spain saw an erosion from over 60% of total fish sales by fish mongers some 10 years ago to below 10% at present. The access to supermarkets is difficult as supermarkets generally buy bulk products centrally. However, some supermarkets have started to also promote local products, especially in the grocery area. Some assistance would be needed to enter this segment of the market.

### 3.6.8 Access to farmers’ markets

Farmers’ markets are already very well established in many EU countries, but fishery products are not present in these type of markets, or at least not in a fresh form. Entering this market segment should be promoted by a dedicated project, helping SSF fishers to sell their products directly to this market segment.

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4. OPPORTUNITIES FOR THE CMO REGULATION TO DEVELOP THE ACTIONS REQUIRED TO INCREASE ADDED VALUE

**KEY FINDINGS**

- The **CMO strengthens the role of actors**
- The CMO is in-line with the **promotion of SSF products** in the EU market
- **All the key elements of the CMO** are a potential help to promote the role of SSF products with the consumers
- The **organisation of the SSF sector** is a key element to improving market access
- **SSF products will guarantee freshness and quality** of the product
- **Fisheries co-management** is an important instrument to be highlighted
- EU consumers demands **safe, environmentally-sound** and sustainable products.
- The European Market Observatory for Fishery and Aquaculture should **be targeting SSF products more**

The official website of the CMO cites: ‘The Common Organisation of the Markets strengthens the role of the actors on the ground: producers are responsible for ensuring the sustainable exploitation of natural resources and equipped with instruments to better market their products. Consumers receive more and better information on the products sold on the EU market, which, regardless of their origin, must comply with the same rules. Thanks to dedicated tools, it is now possible to have a better understanding of how the EU market functions. Today, the Common Organisation of the Markets has come a long way from its beginnings and is a flexible instrument that ensures the environmental sustainability and economic viability of the market for fishery and aquaculture products.

The **five main areas** covered by the scheme are:

- **Organisation of the Sector:** Producer organisations are the key players in the sector. Through their production and marketing plans, they deliver the EU Common Fishery policy.
- **Marketing standards:** Common marketing standards lay down standard characteristics for fishery products sold in the EU, whatever their origin. They are applied in accordance with conservation measures and help to ensure a transparent internal market that supplies high-quality products.
- **Consumer information:** Rules on consumer information establish what information must be provided to the consumer or mass caterer who buys fishery and aquaculture products. They allow consumers to make informed purchasing choices.
• **Competition rules:** The Common Organisation of the Markets is subject to competition rules. Given the specificities of this scheme, exceptions to the application of these rules exist to ensure the functioning of the policy and the achievement of EU objectives.

• **Market intelligence:** The Commission has set up the European Market Observatory for Fishery and Aquaculture Products to contribute to market transparency and efficiency.

The opportunities that the CMO gives to the SSF sector are, thus, absolutely in-line with the findings of this short study. The key to success is the organisation of the sector, and the CMO will provide assistance in organising the sector in a better and more transparent manner. Marketing standards and market intelligence are the key to any reasonable improvement of SSF market performance. Obviously, any intervention has to be sustainable, and therefore has to be market driven.

**4.1. Organisation of the Sector**

An individual fisher will not be able to access the market directly, apart from some possibilities to sell directly to restaurants or customers over the dockside. Therefore, organisation is the key. As already underlined, several groupings exist, but these associations or organisations look after the fishing aspect, rather than the marketing aspect of their members. The change of direction or the creation of new associations for promoting direct marketing will be a major challenge and has to be accompanied by capacity-building for the main actors, including the SSF fishers and their families.

**4.2. Marketing standards**

Any direct sales of SSF products have to underlie the quality and health standards of the EU market. The freshness of the product sold has to be of the highest standards. The proposed logo of SSF will include a reference to the fisheries co-management, guaranteeing the sustainable use of the resource. Minimum sizes of the fish and closed seasons and areas will be respected by the fishers operating under the SSF logo. Labelling of SSF is a great opportunity to inform the consumer on the marketing standards for SSF products.

**4.3. Consumer information**

Consumer behaviour with regard to food items is changing in the EU. There is more interest in safe, environmentally-sound and sustainable products. The idea of buying products from local food producers is growing, especially for products from local agriculture. Initiatives to label local food products as ‘local’ or ‘municipal’ and KM 0 certifications are mushrooming, however not yet for fishery products. In the recent past, the issue of carbon footprint was in the press for fishery products, such as imports into UK from as far away as New Zealand, and whether this is an environmentally-sound practice, however the recent economic crisis has wiped out these considerations altogether. In the northern part of the EU, ecolabels for fishery products are demanded by consumers and by supermarkets, as consumers show an interest in sustainable fisheries management and fish production. The Marine Stewardship Council (MSC) is the most widely used label.

Consumers are also interested in healthy products and market surveys have shown that consumers are willing to pay more for an organic product, while they are reluctant to pay a premium for an eco-labelled product. In the field of fishery products, only aquaculture
products can receive an organic label, as the water quality and the feed of wild fish population cannot be monitored.

The consumer information will include various items, including highlighting the specific quality of SSF products. An informed consumer will be able to select the right fish product, based on the information of the origin, and will be willing to pay a higher price for a local product, for which the freshness and quality are guaranteed by a label or a standard. It is very important in this consumer information not to discredit the competition SSF fishers face from imported products, as discrediting other products in this way can easily put at risk the whole fishery sector, and as experience and controls have shown, the low priced imports meet all health requirements as provided for in EU regulations.

Another issue to be studied further is what the consumer really wants to know about the fish product, whether the present labelling requirements (name of species, Latin name, capture or culture, country of origin (Freshwater or culture fish) or FAO area of capture, best before, etc.) are really what consumers expect from a label for fishery products. Also an important area of study, going beyond the scope of this desk study, is the issue of sophistication or better said of fraud, by which a product is sold under a different name from its real one, obviously a trade name which is for a higher-priced fish. Some studies already carried out indicate that about as much as thirty percent of fish in restaurants is being mislabelled.

4.4. Competition rules

Any intervention has to be sustainable over time, thus competition rules also have to apply to SSF producers working under the SSF logo. By shortening the value chain, the produce of SSF will become very competitive compared to the competition from other animal proteins or from imported fishery products.

4.5. Market intelligence

The European Market Observatory for Fishery and Aquaculture Products is concentrating on information on general market trends, without dedicating any specific interest to the SSF sector. A specific request to better serve the SSF sector should be promoted which will help SSF fishers to better understand the market environment in which they are operating. Price information should be tailored to the needs of SSF fishers.
5. CONCLUSIONS AND RECOMMENDATIONS

KEY FINDINGS

- Total production by the EU is declining year on year
- Increasing imports at discounted prices are a major challenge to EU SSF fishers
- The SSF lost about half of its members during the last decade
- The SSF has an important role to play as a supplier of healthy and fresh food
- The SSF heritage of a millennium tradition
- The CMO is a great opportunity for SSF producers to better access markets

Key interventions by CMO to promote SSF should include:

- Development of a statistical data bank for SSF in the EU
- Investigation on Consumer Preference and Knowledge
- Creation of SSF Marketing Associations
- Market intelligence for SSF
- SSF logo and labelling
- Promotion of SSF products

5.1. Conclusions

The EU’s total production is declining year on year, while fish consumption has reached a plateau of 23 kg, slightly ahead of the global average for fish consumption. The EU is heavily dependent on imports for fish supply to the consumer. More than 60% of the fish consumed in the EU is from outside the Union. Traditionally, imports into the EU were groundfish from the Northern Atlantic, Alaska pollack from the Pacific and some hake from the Southern hemisphere. In recent years, the share of aquaculture products among imported fish product for human consumption has expanded greatly, with shrimp from aquaculture in Ecuador, India and China, and pangasius from Vietnam as the main products. The recent economic crisis and the lower value of the Euro has put the brakes on increasing fish imports in the EU market in recent years, but overall the trend is increasing and fishery products from imports are generally traded at a far lower price than the local competing products. Local SSF are suffering from this competition, and the number of people working in this sector has shrunk in recent years.

SSF have an important role to play as a supplier of healthy and fresh food to the population in the EU, but also as the heritage of a millennium tradition, which needs to be preserved. Coastal villages and river planes would not be the same were SSF fishers to disappear completely. The category is at risk, but the historical momentum is there to promote the sector to consumers, supermarkets and restaurants.

The CMO is a great opportunity for SSF producers to better access the market and to compete successfully with imported products or with products from the EU industrial fisheries. The new legal framework is an excellent mechanism, and has no negative impacts.
or challenges for the sector. Chapter 5.2 provides a concept note on further action under the CMO regulations for the EP’s use, in order to contribute to granting EU SSF fishery products more added value, safer standards and more and clearer information for consumers.

It has to be noted that this concept note is in-line with the recently approved SSF guidelines\(^{21}\), specifically with Para. 7.3.: ‘States should foster, provide and enable investments in appropriate infrastructures, organizational structures and capacity development to support the small-scale fisheries post-harvest subsector in producing good quality and safe fish and fishery products, for both export and domestic markets, in a responsible and sustainable manner’ and Para. 7.10: ‘States should enable access to all relevant market and trade information for stakeholders in the small-scale fisheries value chain. Small-scale fisheries stakeholders must be able to access timely and accurate market information to help them adjust to changing market conditions. Capacity development is also required so that all small-scale fisheries stakeholders and especially women and vulnerable and marginalized groups can adapt to, and benefit equitably from, opportunities of global market trends and local situations while minimizing any potential negative impacts.’ It would be very important if the EU can be in the forefront of developing a specific marketing concept for SSF fisheries products. When the SSF guidelines were adopted by COFI in June 2014, the EU press release stated: ‘The EU welcomes the adoption of the voluntary guidelines on securing sustainable small scale fisheries...’\(^{22}\).

### 5.2. Recommendations

In view of the importance of SSF as an important source of food, source of employment in disadvantaged areas and an important historical cultural heritage, as well as being in-line with the FAO SSF guidelines, it is recommended that the CMO is used, along with its financial incentives, to improve the standing of SSF products in the market.

The standing of SSF in the global context of EU policy is very low, compared to the standing of small-scale agricultural producers, for instance. The visibility of the sector has to be increased, and the best way is to guarantee a good market outlet for SSF products.

It is recommended that the project described under Para 5.3 below is implemented, in close collaboration with local and regional SSF associations and with the private sector, such as supermarket chains, those sensitive to social issues and to consumer information and protection. The CMO seems to be designed for the promotion of SSF products in the EU market and should be used in this approach.

### 5.3. Concept Note for a CMO-based package for SSF promotion and improvement

#### 5.3.1 Background

The Common Organisation of the Markets (CMO) is aimed at strengthening the role of the actors on the ground: producers are responsible for ensuring the sustainable exploitation of natural resources and equipped with instruments to better market their products. Consumers receive more and better information on the products sold on the EU market, which, regardless of their origin, must comply with the same rules. Thanks to dedicated

\(^{21}\) The Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication (the SSF Guidelines) (FAO, Rome, Italy 2015).

tools, it is now possible to have a better understanding of how the EU market functions. The five main areas covered by the scheme are: Organisation of the Sector, Marketing standards, Consumer information, Competition rules and Market intelligence.

Small-Scale Fisheries (SSF) play an important role in the EU’s fish production. It has been estimated that SSF represent one quarter of the catch value. While the product from the industrial fleet is generally frozen and used as a raw material, in the fish processing industry the product from SSF generally goes to the fresh fish or wet fish market. SSF are generally composed of smaller vessels, and are more reliant on coastal areas. Crews on vessels are smaller. SSF are more selective, costs are generally lower, and vessels have lower fuel consumption, making them less sensitive to changing fuel prices. Employment in the sector has shrunk in recent years by almost 40% to an estimated 120,000 units at present.

SSF, in principle, can guarantee the freshness of the product, the quality and the authenticity of the product. In all markets, and especially in those markets where the consumer has a knowledge of fish and seafood, fish from capture fisheries has a higher price and a better image than aquaculture products.

Consumer behaviour with regard to food items is changing in the EU. There is more interest in safe, environmentally-sound and sustainable products. The idea of buying products from local food producers is growing, especially for products from local agriculture. Initiatives to label local products as ‘local’ or KM 0 are mushrooming, however not yet for fishery products. In the northern part of the EU, ecolabels for fishery products are demanded by consumers and by supermarkets, as consumers show an interest in sustainable fisheries management and fish production. The Marine Stewardship Council (MSC) is the most widely used label. Consumers are also interested in healthy products and market surveys have shown that consumers are willing to pay more for an organic product, while they are reluctant to pay a premium for an eco-labelled product. Overall consumers are not well informed with regard to the fish products they find on the market, despite the detailed labels which are obligatory nowadays. In principal, consumers expect the fish in the market or in the restaurant to come from the neighbourhood, from the sea, river or ocean closest to his/her area. The fact that the vast majority of fish products on the market are from far away has never really occurred to the consumer.

The CMO is a great opportunity for SSF producers to better access the market and to compete successfully with imported products or with products from the EU’s industrial fisheries. The new legal framework is an excellent mechanism, and has no negative impacts or challenges for the sector. The following activities have been identified as essential to applying the CMO and its principles to the SSF sector.

**5.3.2 Activities**

The activities below will be carried out over a five-year period.

**5.3.3 Develop a statistical data bank for SSF in the EU**

This data bank will contain statistics on employment in the SSF sector in the EU, statistics of production, by species, areas, number of vessels, main landing sites and market structures.
5.3.4 Investigation into Consumer Preferences and Knowledge

The CMO is highlighting the role of consumer information, however there are no data or research on what the present preferences of consumers are with regard to fish consumption, whether the consumer is able to read the new labels of fishery products, whether the consumer is able to understand these labels and the difference between certain products, be that SSF products, industrial products or products from aquaculture. Before venturing into any label or logo, it is fundamental to understand the knowledge consumers have in all of the 28 EU countries, and, in its first year, the project will include a detailed consumer survey. In the project implementation, consumer information will be key, including a general overview of the health benefits of fishery products, but also, specifically, a description of local products and generic information on the freshness of products.

5.3.5 Creation of SSF Marketing Associations

The project will analyse the existing associations of SSF and whether they can become marketing associations. Clear guidelines will be developed on how these marketing associations should function. This activity will include gender aspects and give opportunities to women in SSF communities to participate in the marketing associations.

5.3.6 Market intelligence for SSF

The existing European Market Observatory for Fishery and Aquaculture Products will be diversified in order to create a sub-area dedicated to SSF products and their specific needs with regard to market intelligence. A monthly bulletin on price information at local level will be prepared and published, including as an SMS or WhatsApp service, to reach SSF fishers and their marketing associations easily.

5.3.7 SSF logo and labelling

The project will develop an SSF logo with certain criteria on the type of production, the protection of the environment, on social aspects and economic aspects. All products from SSF fishers that meet the criteria as described in the logo will be labelled for consumer information.

5.3.8 Promotion of SSF products

Once the criteria and the logo are established, the CMO will help to promote SSF products, both at EU, national and local level. The promotional campaign will work closely together with the fisheries departments of Member States, local fisheries units, SSF fishers and other stakeholders in the preparation and implementation of the promotional campaign. An important part of the promotional campaign will be promotions through modern technology, but also through TV cookery programmes, etc.

- Use of modern technology
- Direct sales
- School information
- Access to supermarkets
- Access to farmers’ markets
Table 3: Indicative budget for CMO-based package for SSF promotion and improvement

<table>
<thead>
<tr>
<th>Indicative budget</th>
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<tr>
<td>Develop a statistical data bank for SSF in the EU</td>
<td>500 000</td>
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<tr>
<td>Investigation into Consumer Preferences and Knowledge</td>
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<tr>
<td>Creation of SSF Marketing Associations and facilitation of meetings</td>
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<td>Market intelligence for SSF</td>
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<td>SSF logo and labelling</td>
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<td>Promotion of SSF products</td>
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<td>Use of modern technology</td>
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<tr>
<td>Direct sales</td>
<td>100 000</td>
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<tr>
<td>School information</td>
<td>120 000</td>
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<td>Access to supermarkets</td>
<td>250 000</td>
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<tr>
<td>Access to farmers’ markets</td>
<td>250 000</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>4 990 000</strong></td>
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</tbody>
</table>

This budget is based on a five-year programme, to be implemented in all 28 EU Member States. The indicative budget is based on the assumption of consultant time, seed money for creating and running SSF Marketing Associations, Creating and implementing internet-based direct sales initiatives, dialogue with supermarkets, and establishment of dedicated fairs and exhibitions or the participation of SSF fishers in seafood promotional fairs. The budget above is indicative, and will be developed in more detail once the project concept is approved.

Table 4: Work plan for CMO-based package for SSF promotion and improvement

<table>
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<tr>
<th>Activity/Year</th>
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<th>2</th>
<th>3</th>
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<tr>
<td>Develop a statistical data bank for SSF in the EU</td>
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<td>Investigation into Consumer Preferences and Knowledge</td>
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<td>Creation of SSF Marketing Associations and facilitation of meetings</td>
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<td>Market intelligence for SSF</td>
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<td>SSF logo and labelling</td>
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<tr>
<td>Promotion of SSF products</td>
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<tr>
<td>Use of modern technology</td>
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<td>Direct sales</td>
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<td>School information</td>
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<tr>
<td>Access to supermarkets</td>
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<tr>
<td>Access to farmers’ markets</td>
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ANNEX

Annex I: Per capita fish consumption in the EU by type of species group\(^{(24)}\)

The following graphs are based on unpublished statistics from FAO Food Balance Sheets.
Annex II: Experience from the USA

In North Carolina, USA, the Community Supported Fishery model aims to connect small-scale fishers with local/regional consumers through a weekly seafood ‘subscription’. Consumers pay upfront for a scheduled season (in our case, 10 weeks) and each week, they pick up whatever seafood the fishers have caught that day. The market slogan is to support local fisheries and get the freshest, highest quality seafood\(^{25}\).

Community-Supported Fisheries

Based on the community-supported agriculture (CSA) model, a community-supported fishery (CSF) is a programme that links fishermen to a local market. In a CSF, customers pre-pay for a ‘season’ of fresh, local, low-impact seafood, and in turn they receive a weekly or bi-weekly share of fish or shellfish.

CSFs (whether in Down East, Maine or North Carolina) seek to reconnect coastal communities to their food system, encourage sustainable fishing practices, and strengthen relationships between fishermen and communities.

Dock Pick-Ups

Another means of buying direct is directly off the boat or at a fishermen’s market. Such markets are typically held at the closest marina or port. Most often they are overlooked. As an attempt to make a better living, fishermen are now taking on roles in direct marketing. Due to licensing, health codes and food safety, these markets will likely have whole fish for sale. This fish is fresh, local, in season, and a great example of shortening and straightening the supply chain. Whether you are in Half Moon Bay or Santa Barbara, these markets seek to reconnect coastal communities to working waterports, encourage seasonal and local eating habits, and strengthen relationships between fishermen and communities.

Farmers’ Markets

Farmers’ markets are one of the oldest forms of direct marketing by small farmers. Fishermen are now sharing this space. Growers, bakers and fishermen all over the world gather weekly to sell their products directly to the public. In a farmers’ market, a group of fishermen or a partner buyer/processor will sell their products once or twice a week at a designated public place like a park or car park. Fishermen must work with local processors to bring a filleted and packaged product to the consumer. Shopping at a farmers’ market can be a great way to meet local fishermen and get fresh, local seasonal seafood.

Boat-to-School

Based on the Farm-to-School model, Boat-to-School is a programme that links fishermen and local processors to school cafeterias in preschools, grades K-12, and colleges. In boat-to-school programmes, schools and local processors determine the weight (in pounds) needed for their school in any given period and the amount of meals served per day. Based on this information, the two will agree, often under contractual terms, a species, price and poundage. Schools are also interested in the educational value of using seafood, in particular, to teach lessons related to health, history, geography and science.


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\(^{25}\) For more information on this model, visit: https://namanet.org/our-work/market-transformation/community-supported-fishery.
### Annex III: Ecolabels for Fishery Products

<table>
<thead>
<tr>
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<th>Abbreviated Name</th>
<th>Logo</th>
<th>Function</th>
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<td><strong>Responsible Fishing Scheme</strong></td>
<td></td>
<td>The Responsible Fishing Scheme has been developed to raise standards in the catching sector, (UK)</td>
<td><a href="http://www.seafish.org/rfs/">http://www.seafish.org/rfs/</a></td>
<td></td>
</tr>
<tr>
<td><strong>Seafood Watch</strong></td>
<td></td>
<td>A programme by Monterey Bay Aquarium designed to raise consumer awareness about the importance of buying seafood from sustainable sources.</td>
<td><a href="http://www.seafoodwatch.org">www.seafoodwatch.org</a></td>
<td></td>
</tr>
<tr>
<td><strong>US department of Commerce</strong></td>
<td><strong>Dolphin Safe</strong></td>
<td>Tuna caught without killing dolphins</td>
<td></td>
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</tr>
</tbody>
</table>
DIRECTORATE-GENERAL FOR INTERNAL POLICIES

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STRUCTURAL AND COHESION POLICIES

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