srm

short report

maritime economy

Fisheries and Food Safety: ideas for a strategic approach

edited by Federpesca[1]

The contribution of first class protein provided by the consumption of fishery products is essential in the human diet and is largely recommended in the major directions of the scientific community as an essential element in the growth stage, and for the maintenance of a healthy condition.

The uniqueness of these proteins, compared to other proteins that the human body cannot autonomously synthesize, derives from its content of high polyunsaturated fatty acids, in particular Omega 3, which represent an important element for the cardiovascular system and for the functioning of nerve cells. The value of these proteins is also due to other essential nutrients and to their digestibility.

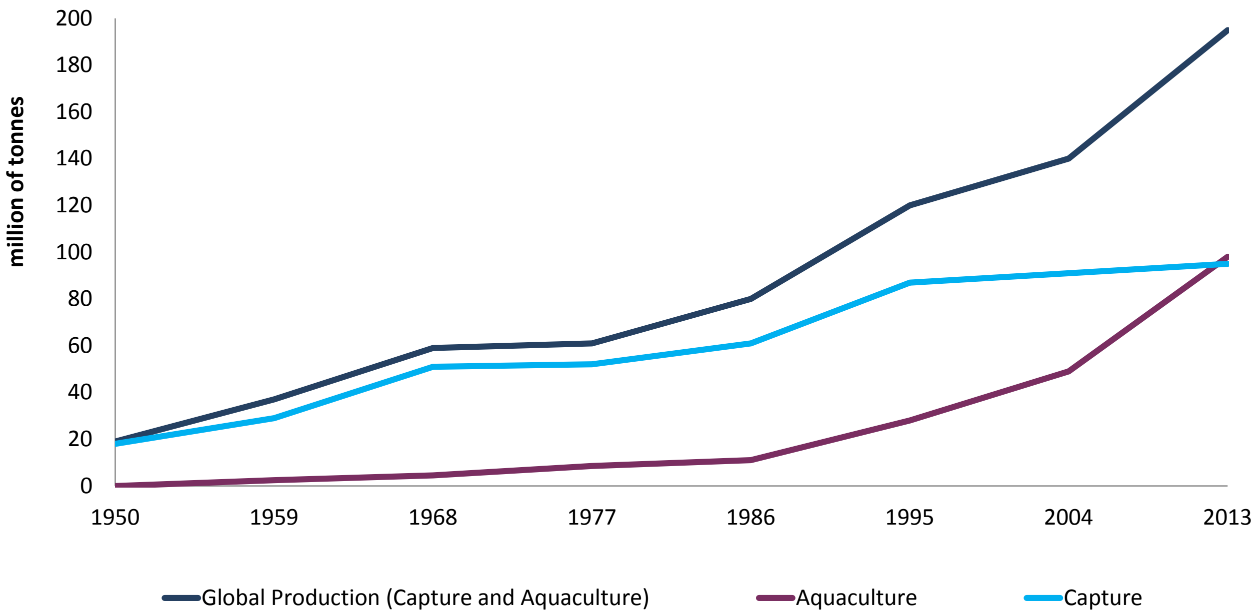
Furthermore, fish is tasty.

In short, it is a food which should not be missing from the table and which is certainly among those privileged produce in the Mediterranean diet.

[1] Federpesca is the national association of fishing companies and the main organization which gathers together companies within the fishing sector. Established in 1961, it comprises of more than 1,900 sea fishing companies, 11 net suppliers and 32 canning factories. Altogether, it counts almost 2,500 fishing vessels ranging from 10 to 2,300 GT.

This information evidently reached all the inhabitants of the planet as the level of global consumption of fishery products has attained the heights shown in the graph below on global production (fisheries + aquaculture) in the 1950-2013 period.

Fig. 1 - Fish production (1950-2013)



Source: FAO

Despite the growing contribution offered by aquaculture productions, fisheries represent an irreplaceable supply source of fish with its own considerable trend. To date, the range of species that can breed is limited and the difference in taste compared to wild species is perceptible.

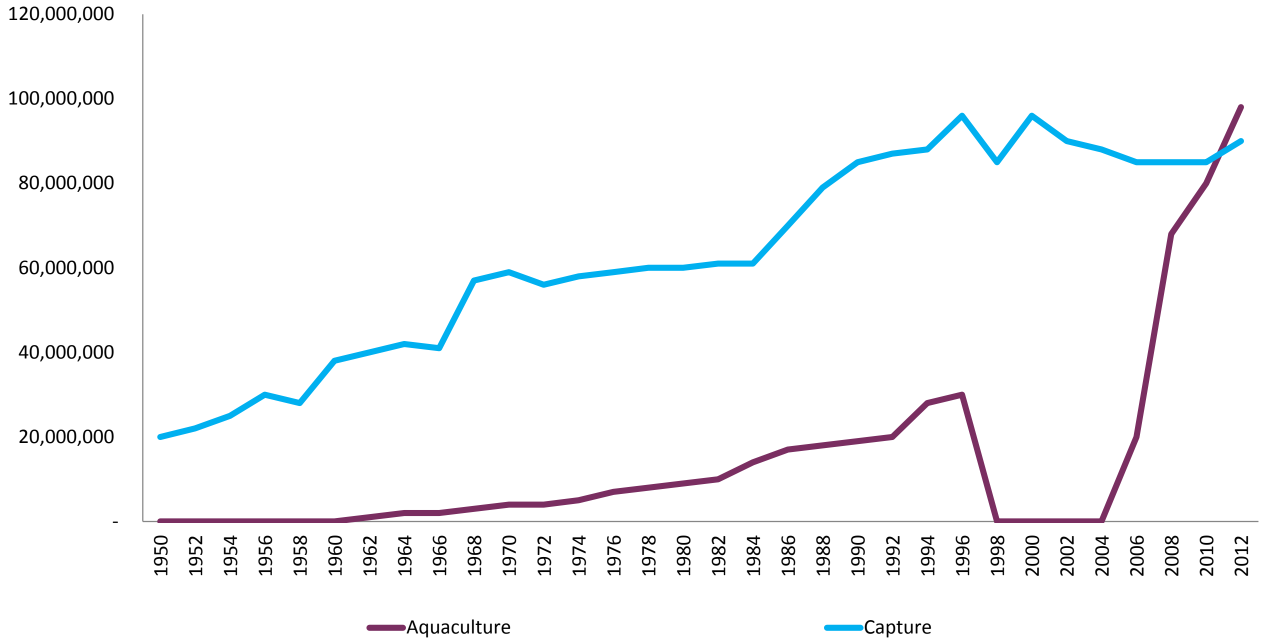
Fisheries in the EU show a negative trend and a decreasing level of self-sufficiency (44%). This is the consequence of the enforcement of the Common Fisheries Policy, increasingly oriented to adapting the fisheries capacity (fleet) to the availability of resources, resulting in extreme caution.

As for the Mediterranean, capture production shrinks as a result of the excessive effort/fishing mortality not balanced by the reduction in fishing capacity enforced by the EU.

The remaining riparian countries instead, enlarged their fleets by replacing the EU flag vessels which had been withdrawn from fishing activities, as a consequence of the incentives to demolish the vessels.

Therefore, the balance in terms of capacity remained unchanged, although it resulted in negative terms of fish stocks, due to the replacement of the fishing vessels once subjected to the strict EU rules with other less controlled and controllable vessels.

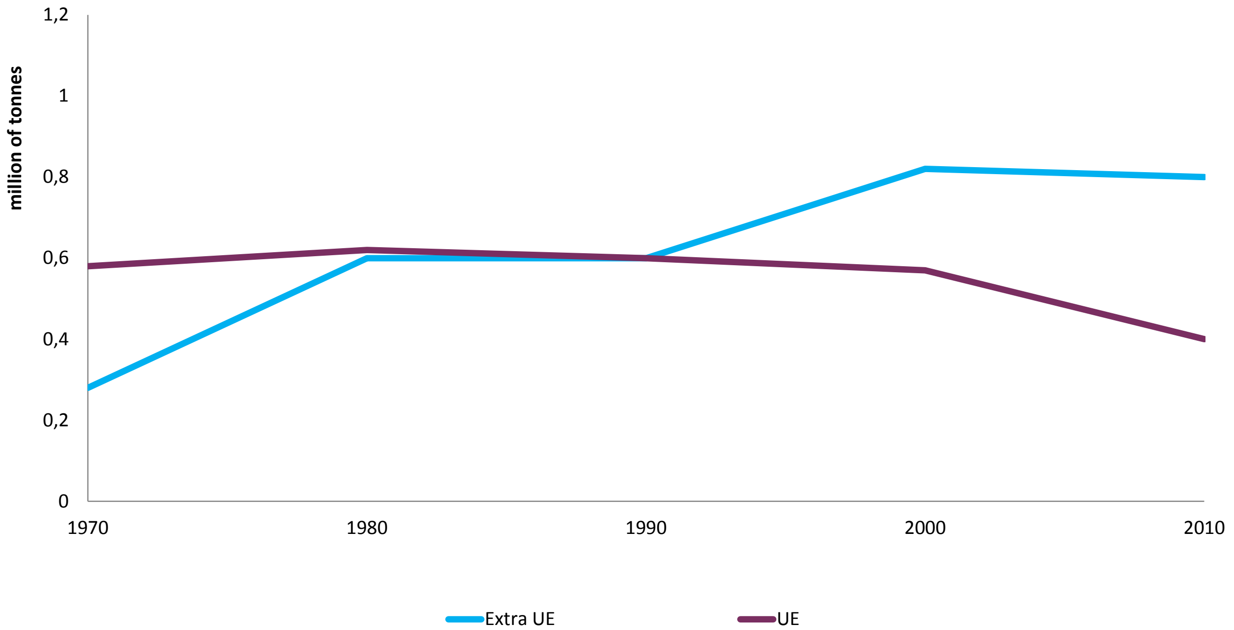
Fig. 2 - Global production comparison (Capture and Aquaculture)



Source: FAO

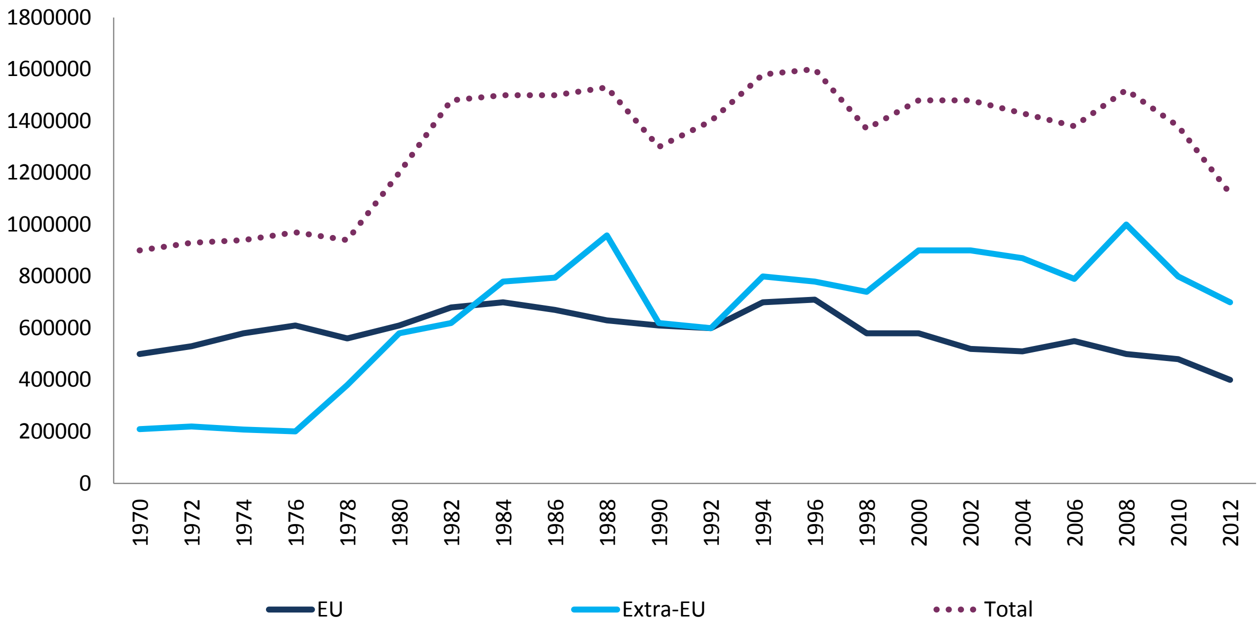
The European Commission informs (January 2014) that overfishing in the Mediterranean regards 96% of demersal resources and 71% of the pelagic ones.

Fig. 3 - Production in the Mediterranean (EU and Extra-EU)



Source: FAO

Fig. 4 - Total and partial production in the Mediterranean



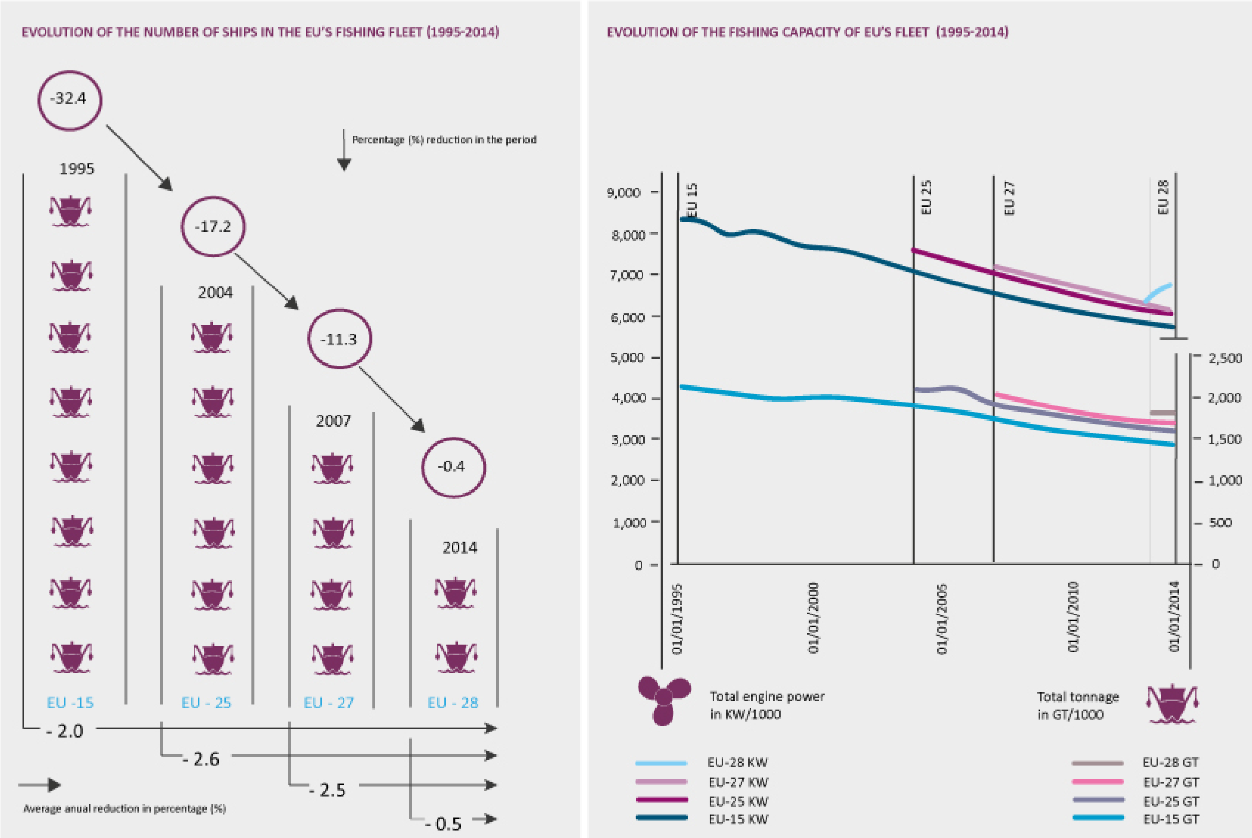
Source: FAO

Capture production by EU fleet in the Mediterranean is reducing more compared to the Mediterranean average, as a result of the fishing capacity brought about by the new Common Fisheries Policy.

The new direction taken by this policy does not take into account a significant legal element: the waters under the European territorial sovereignty in the Mediterranean coincide with the territorial waters (12 mg. from the baselines). Consequently, besides the Exclusive economic zone unilaterally declared by Algeria, Tunisia, Libya and Egypt, the remaining part of the Mediterranean is open to the exploitation by fishing fleets belonging to all the (riparian and non-riparian) countries of the Mediterranean basin.

Guaranteeing the supply of fish products in the European markets – which obviously includes the Italian one – in the presence of a continuous increase in global and EU demand, is a serious problem in the medium to long term. The reduction of captures will not be balanced by a further development in aquaculture production due to the environmental restrictions and financial (fish farming involves a large availability of money, a capital tied up in a cycle lasting on average 15-18 months for the purchase of the fry, feed and the necessary services).

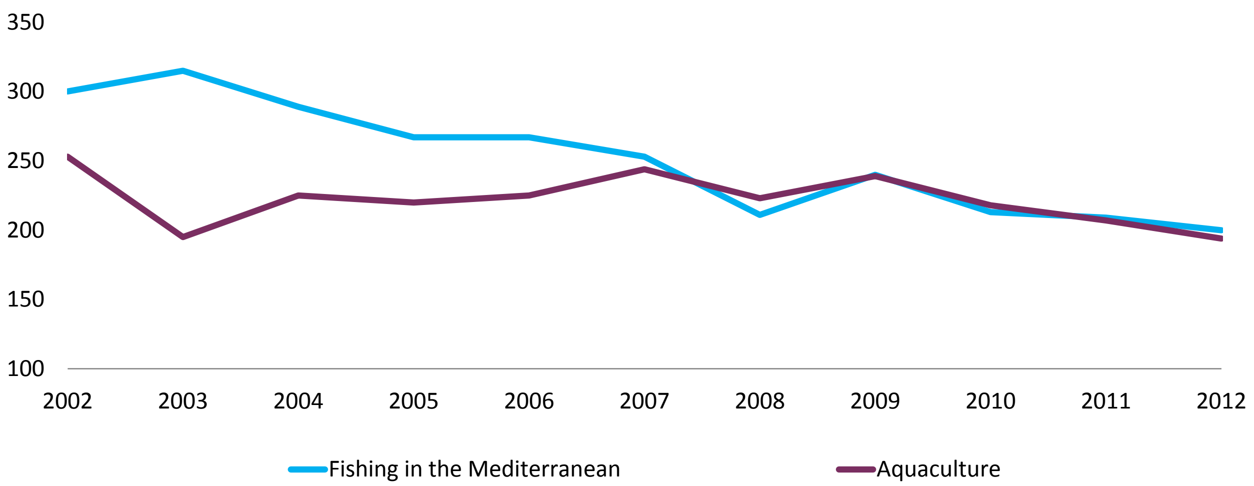
Fig. 5 - Evolution of the number of ships in the EU's fishing fleet, in the 1995-2004 period



Source: SRM's elaboration on data from the EU's fishing fleet register

The Italian market is more disadvantaged than its EU competitors, reaching a level of self-sufficiency that does not exceed 25%, a considerably lower average compared to the European one.

Fig. 6 - The dynamics of the Italian market



Source: ISMEA

Tab. 1 - Leading world producers (2011) (Capture and Aquaculture) (volume in tonnes live weight and in percentage)

Total	177,632,194	100%
China	659,03,381	37.10%
Indonesia	13,601,723	7.70%
India	8,879,499	5.00%
Peru	8,346,461	4.70%
EU-28	**6,143,294**	**3.50%**
United States	5,559,838	3.10%
Vietnam*	5,555,000	3.10%
Philippines	4,971,799	2.80%
Japan*	4,755,093	2.70%
Chile	4,436,484	2.50%
Russia	4,391,154	2.50%
Myanmar	4,150,091	2.30%
Norway	3,572,608	2.00%
South Korea	3,260,930	1.80%
Bangladesh	3,124,677	1.80%
Thailand	2,868,436	1.60%

*FAO's estimation.

Source: Eurostat and Eumofa for EU-28 and FAO for the other countries

Under these circumstances, the Italian route to food safety in the consumption of fish products has to take into account an active involvement of the African and Middle Eastern sector. These countries and fishing distribution areas are characterized by a relative abundance of resources although there is growing domestic demand.

This is especially true for those countries which are keen to emancipate their hydrocarbon-based economies and which aim at the development of the food production chain.

The quantitative/qualitative surplus of fish productions from fisheries and aquaculture is an added value that our markets should detect, but is also a unique opportunity for the Italian industry related to the productive technology which includes transformation, logistics and marketing of fish products. The demand of these countries is urgent and recurring as the role of food commodities and high quality products is increasingly becoming pivotal.

Italy is rich in specialized knowledge and innovative technologies in all the stages of the seafood chain [...].

The process thus activated, implies not only the export of facilities and services, but also balancing the domestic needs (food-related and non-food related) of the most resourceful countries and the compliance with the regulations, the rational and sustainable exploitation of resources, the quality and wholesomeness of products.

The goal remains the creation of added value through such industry initiatives, both to the benefit of the economy and employment level of the countries involved and of the concrete development of the whole European – and especially Italian – economy.
In this sense, the much appreciated characteristics and peculiarities of the “Sistema Italia” are the basis of some preferential relations which are capable of making Italy a major player in the development of the fisheries industry on a global scale.

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