

DEFINITION OF DATA COLLECTION NEEDS FOR AQUACULTURE

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OBJECTIVE

To identify the data required to assess the evolution and economic performance of the aquaculture sector and the best mechanisms for collecting this data

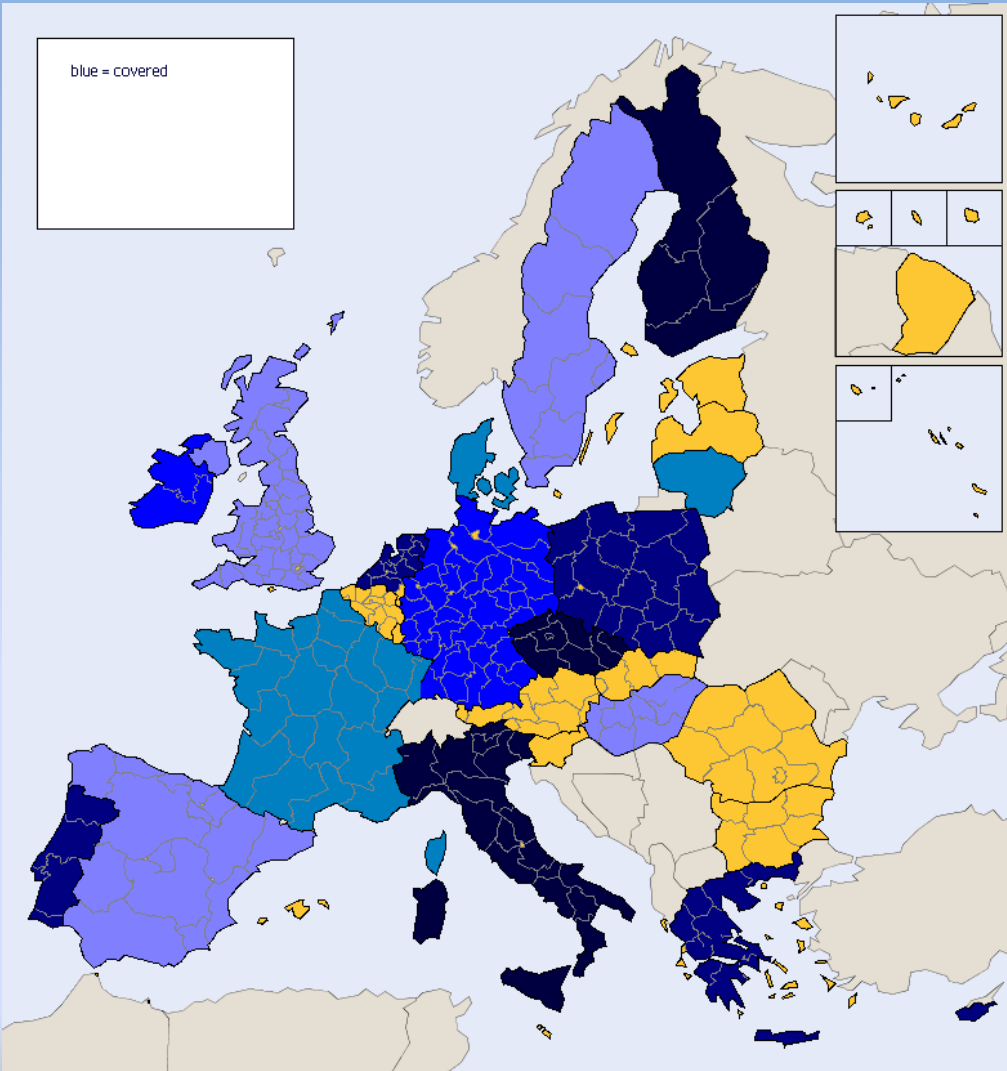


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TERMS OF REFERENCE

- Review studies on the sector's performance
- Review of status and outlook of the sector
- Assess the feasibility of collecting regularly economic indicators:
 - Turnover, costs, profit levels
 - Balance sheets
 - Employment
 - Number of enterprises
- Assess the feasibility of a permanent data collection scheme;
 - Propose a cost-effective structure for the implementation
 - Estimate costs of the data collection
- Collection of baseline data

COVERAGE



PRESENT STATUS

- **Database for literature completed. Deadline for uploading in June**
- **Preliminary review of the situation completed.**
 - National production and segmentation
 - EU international trade in farmed fish
 - Present situation and outlook for main segments
- **Surveys under preparation. Deadline for execution in June.**

PERFORMANCE OF THE SECTOR

- Overall 1.3 mln tonnes, about 3 billion Euro, 64,000 people
- Salmon and seabass/bream - growth, although lower than in other parts of the world.
- Trout and carp – gradual deterioration.
- Mussels and oysters – volumes constant, value up due to higher prices.



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PROJECT CHALLENGE

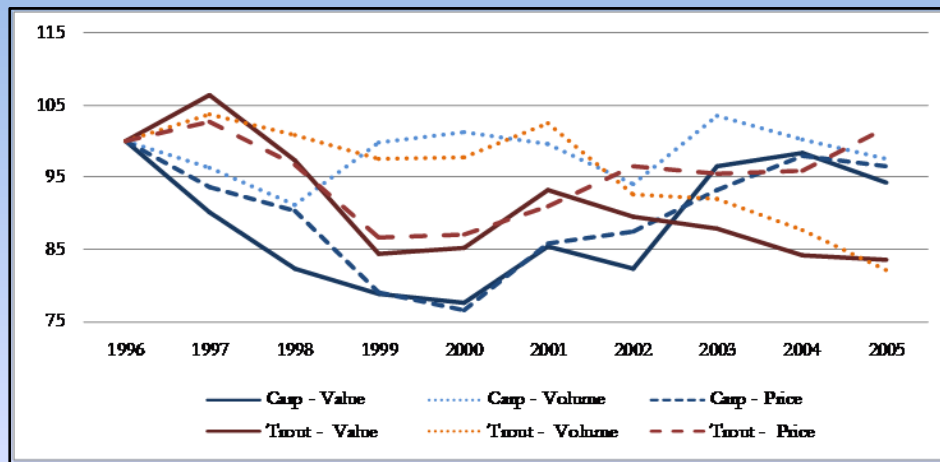
Data to be collected:

- turnover: per species or group of species
- production costs
 - wages and salaries
 - energy
 - live raw material
 - feed
 - other
- depreciation
- investment in tangible goods
- equity capital
- debts (short and long term debts)
- value of unpaid work
- employment and FTE
- no. of enterprises by legal status

**GETTING SUFFICIENT
COOPERATION FROM
INDIVIDUAL
COMPANIES IS
UNCERTAIN**

PERFORMANCE – FRESH WATER

- Production volume slightly down, prices maintain value

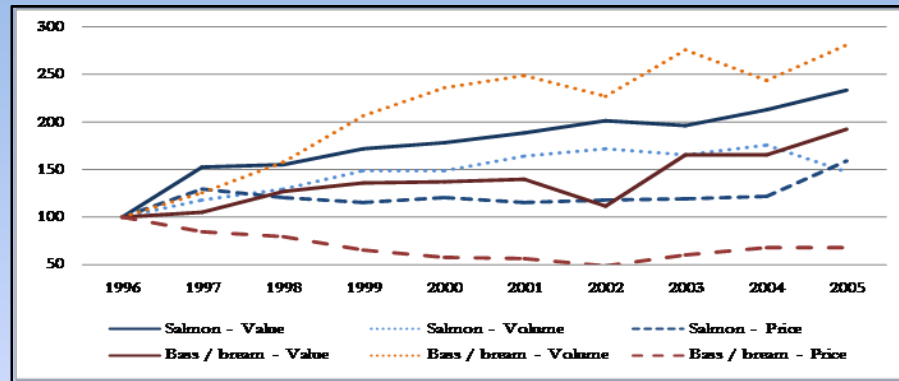


Source: FAO

- EU imports are increasing, while exports stagnate -> EU producers lose market share
- Large number of small producers -> technological progress is uncertain

PERFORMANCE – SALT WATER

- Steady increase of volume and value

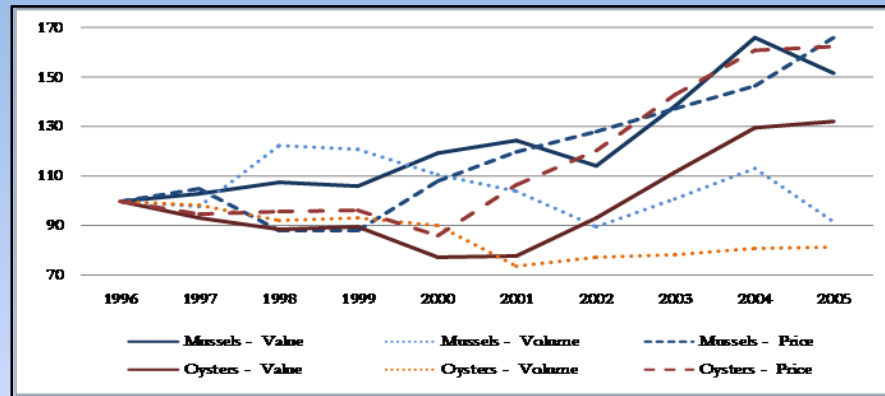


Source: FAO

- Global production and imports increase even faster -> loss of market share
- Large companies involved -> significant technological progress, but not tied to EU as production area

PERFORMANCE - BIVALVES

- Volumes constant, value up due to higher prices



Source: FAO

- Exports and imports are stable, but global production rising
- Large number of small oyster producers

FINAL COMMENTS

- New species are promising but not yet proven on large scale.
- EU aquaculture is facing major constraints:
 - User conflicts (availability of sites)
 - Production and feed quota
 - Environmental regulations (water use, waste water, etc.)

