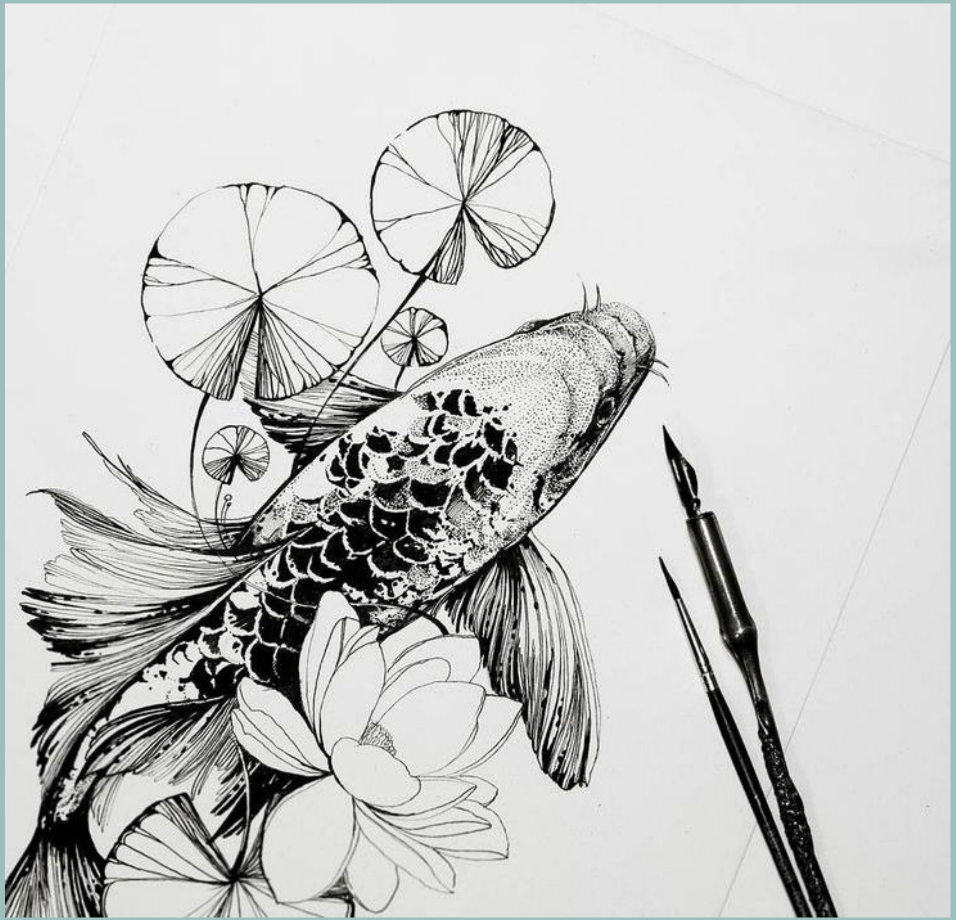

# ITALIAN ORGANIC AQUACULTURE: CHANCE OR CHALLENGE?


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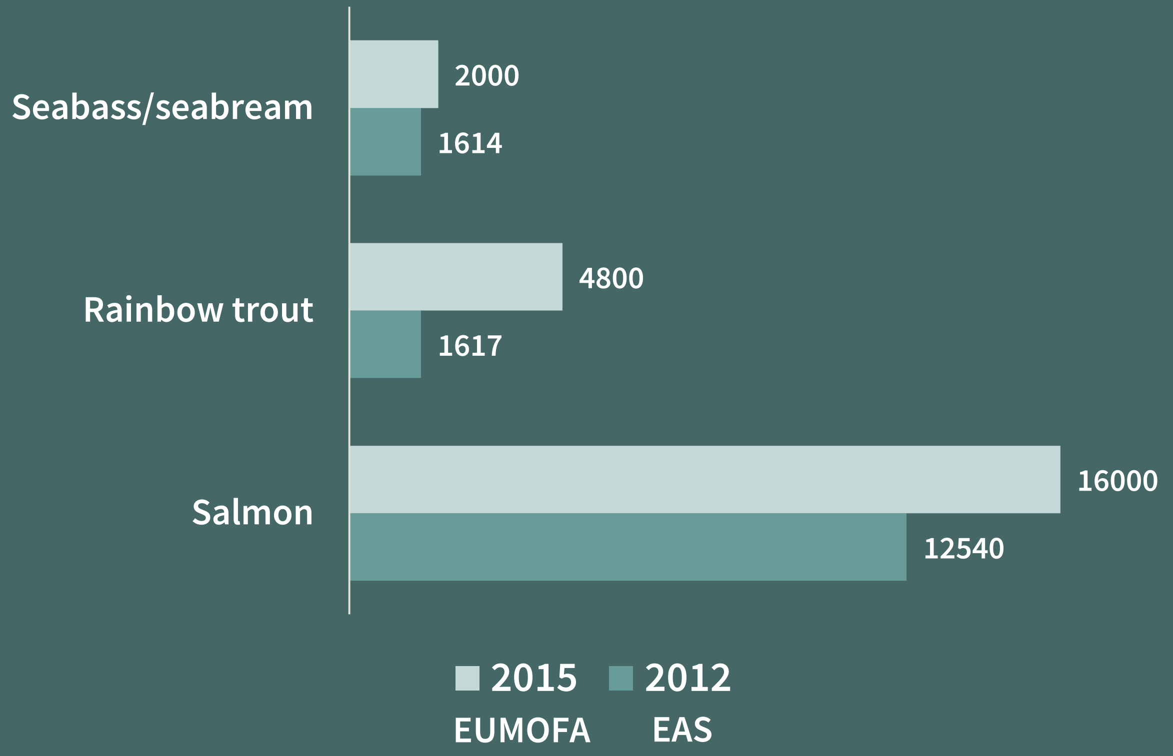
International exhibition and conference for aquaculture, algaculture, vertical farming and fishing industry

15-16 February 2018 – Pordenone

Source: EUMOFA (European Market Observatory for Fishery and Aquaculture Products)

EU organic aquaculture had a strong increase between 2012-2015 for the major species
but
productive and economic performances are still not satisfactory

**Organic production** in 2015 accounted for **4%** of total aquaculture production

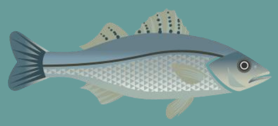


| Species | Production 2015 (t) |
|---|---|
| *Mytilus galloprovincialis* | **20,000** |
| *Salmo salar* | **16,000** |
| *Cyprinus carpio* | **6,000** |
| *Oncorhynchus mykiss* | **6,000** |
| *Dicentrarchus labrax, Sparus aurata* | **2,500** |

Organic salmon and trout leads to significant price premiums
Demand is strong

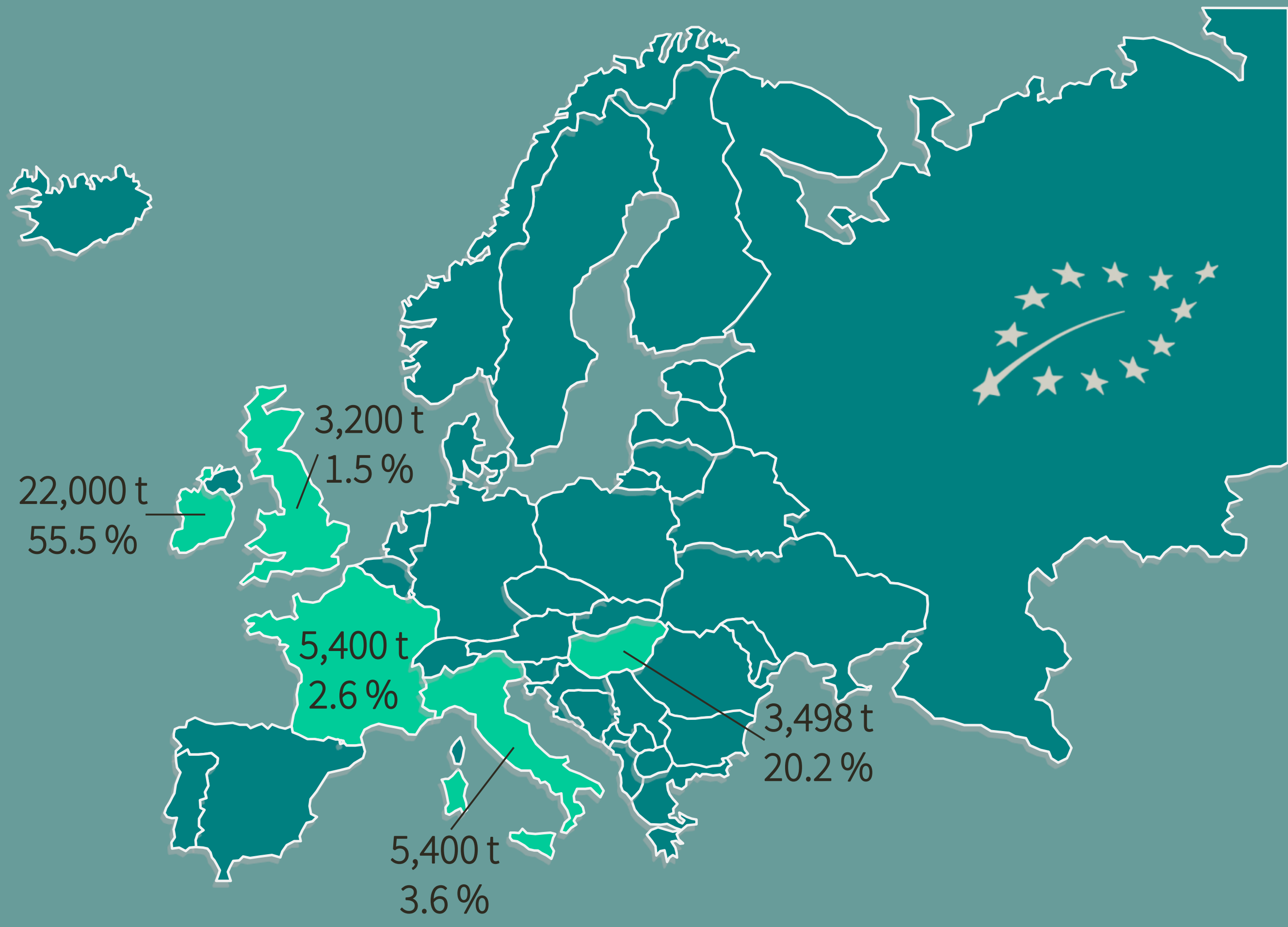
Organic mussel farming developed recently
20% price premiums
Strong demand

Organic carp cannot cover its extra costs



Organic farming of seabass and seabream provides sales premiums lower than the additional costs
Limited market expansion

Source: EUMOFA (European Market Observatory for Fishery and Aquaculture Products)



# MAJOR CONCERNS

## FISH FARMER

Recent regulation (EC 710/2009)

High production and certification costs

Finding appropriate feeds and organic-certified juveniles

## LARGE RETAILERS


High prices and limited range/volumes of available products

Competition with wild fish from responsible fisheries or fish farmed responsibly

## CONSUMER

Confusion: what is organic and what is not?

Overlap with other concepts (sustainable, biological, ecological, wild)

Variety of ecolabels and organic logos

# GOALS

## 1

DATA COLLECTION

number, position , typology of Italian farms; total annual production

## 2

PROMOTE APPEAL FOR ORGANIC AQUACULTURE

Large and small retailers, GAS, canteens

## 3

OUTLINE THE ITALIAN ORGANIC FISH CONSUMER AND PROMOTE AWARENESS

## 4

PROMOTE COMMUNICATION AND INFORMATION EXCHANGE AMONG STAKEHOLDERS

(farmers, feed companies, certification bodies, researchers, institutions, retailers, consumers)

# STRATEGY

**1** Create continuous and direct interaction with farmers

**2** Explore market opportunities along the entire distribution chain

Interviews, surveys, questionnaires

**3** Try to meet consumer's requirements

Workshops, informative material, questionnaire

**4** Use different communication channels

Scientific reports, associations websites and magazines, social media, workshops, congresses and information days

# ITALIAN ORGANIC AQUACULTURE 2016 IN NUMBERS

**29** Organic certified farms
(**40** in 2015)
**24** in business in 2016
**5** started organic production in 2017
**6** Different farm typologies
**10** major species produced
(Other EU countries have less diversified production)

**14** Fish farms
**3** Trout farms
**2** Off-shore mariculture
**9** *Valli*

## ORGANIC FARMS POSITION

# ITALIAN ORGANIC AQUACULTURE 2016 IN NUMBERS

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**5** started organic production in 2017
**6** Different farm typologies
**10** major species produced
(Other EU countries have less diversified production)

**14** Molluscs farms
(**11** mussel farms, **3** clam farms,
oyster produced in **1** farm)

**1** Shellfish farm

## ORGANIC FARMS POSITION

TOP 5 LIST

## TOP FIVE SPECIES PRODUCED 2016

1 *Mytilus galloprovincialis* **5,898 t**

2 *Oncorhynchus mykiss* **900 t**

3 *Ruditapes philippinarum* **263.6 t**

4 *Sparus aurata* **96.9 t**

5 *Mullet (several species)* **89 t**

## THE OTHER FIVE 2016

6 *Dicentrarchus labrax* **10.2 t**

7 *Penaeus japonicus* **5 t**

8 *Ostrea edulis* **4 t**

9 *Anguilla anguilla* **3.3 t**

10 *Atherina boyeri* **2.5 t**

# ENHANCING ITALIAN ORGANIC AQUACULTURE

# The potential actors of the organic aquaculture chain

## PURCHAISING GROUPS

**1546** contacts

**40** families
**10** kg/month

Purchase fish/molluscs/crustaceans?

**NO** 52.6%

**YES** 47.4%
50% sustainable

Purchase aquaculture products?

**NO** 71.9%

**YES** 28%
56% organic

Logistic issues
Lack of information

## QUESTIONNAIRE AIMS

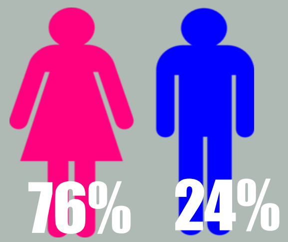
Outline the Italian consumer of farmed fish

Investigate Italian consumer's responsive behavior to organic aquaculture products

Understand the Italian consumer concerns for sustainability

Guide stakeholders towards suitable productive and marketing strategies

## COMPOSITION OF THE SAMPLE




Age 30-50 y

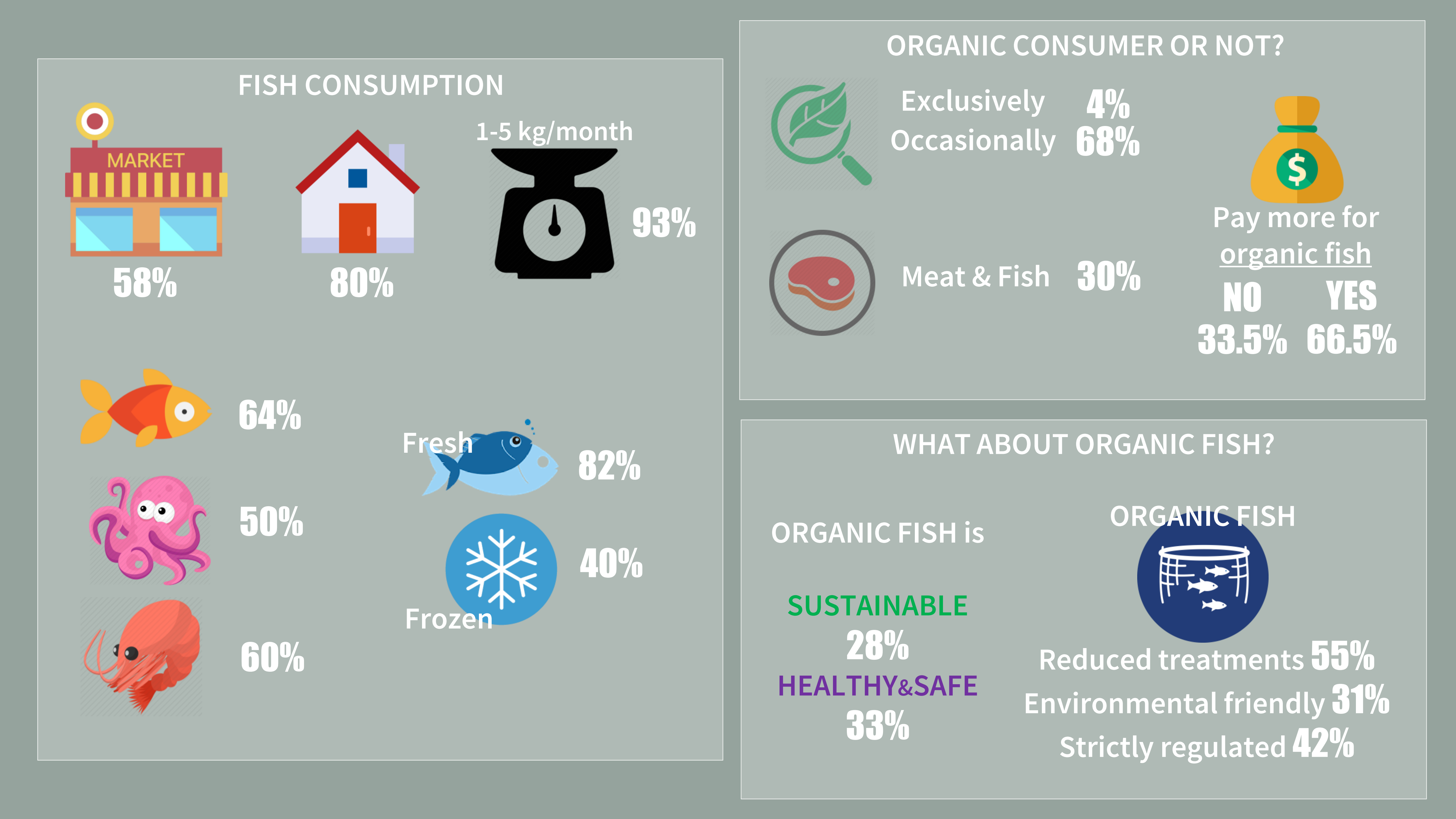
57%

Nord 37%

Centro 46%

Sud 17%

* PRELIMINARY OUTCOME BASED ON 7300 ANSWERS


FISH CONSUMPTION
MARKET
58%
80%
1-5 kg/month
93%
64%
50%
60%
Fresh
82%
Frozen
40%
ORGANIC CONSUMER OR NOT?
Exclusively 4%
Occasionally 68%
Meat & Fish 30%
Pay more for organic fish
NO 33.5%
YES 66.5%
WHAT ABOUT ORGANIC FISH?
ORGANIC FISH is
SUSTAINABLE
28%
HEALTHY&SAFE
33%
ORGANIC FISH
Reduced treatments 55%
Environmental friendly 31%
Strictly regulated 42%

Thank you for your attention

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