Case Study:
Sbass & Sbream

The aquaculture production is dominated by Asian countries covering 88% of the production volume. In contrast, the EU28 contribution to world aquaculture production has been decreasing significantly over time in both volume and value terms, representing only 1.9% and 3.5% of global production in 2012 (STECF Rep.). EU aquaculture production is mainly concentrated in 5 countries: Spain, United Kingdom, France, Greece and Italy. The total sales volume for the EU (28) marine aquaculture sector is estimated to be 0.37 million tonnes and the total value of sales (turnover) is estimated to be 1.95 billion Euros in 2012.
The case study is based on the investigation of the potential that can express two major aquaculture species in the Mediterranean as a sea bass and sea bream.
The two species are, in terms of supply, an important alternative to the decline of the volumes of seafood product guaranteed by fishing. Aquaculture is a major source of employment and income for coastal rural areas in many European countries. The aquaculture products originated in these EU areas compete with imports from developing countries where often there is a lack of basic operational practices related to environmental protection, workforce protection, workforce rights and ethical behaviour against local communities.

Case Study "Seabass and Seabream"

The "SBream and SBass" case study is part of SUCCESS funded by the EU.
The following partners are involved in this case study:

- NISEA (Italy)
- IFREMER (France)
- UNIPA (Italy)
- University of Cantabria (Spain)
- Alexander Technological Educational Institute of Thessaloniki (ATEITH) (Greece)
- Kilic Seafood Production-aquaculture

Main topic

The development sector registered aquaculture of marine species euryhaline is considered as a starting point to investigate the similarities and differences of the sector in the various countries involved in the CS.
It will have a comparison of inefficiencies and bottlenecks that have hindered the development of new fish-farms and the future that can be envisaged for the sector's growth.
The involvement of partners extra-EU, the Turkish aquaculture farm, will help you understand any best practices that have enabled the development of the sector in the Mediterranean area is not subject to Community rules.
Equally it will be taken into account the best practices that could be replicated in the Mediterranean region and between Community countries and extra-EU one.
Particular emphasis will be placed on the endogenous inefficiencies related to the administrative and bureaucratic system in different countries.

Challenges

The aquaculture production of sea bass and sea bream is typical of the Mediterranean Region. The main marine species of farmed fish consist of seabass and seabream. In Europe, the seabream represents 20% of the sales volume of marine species (by volume) and the sea bass over 19% , while in the sea bream value is 19% of the product in Europe, the bass 21%.
The species most sold in Europe, both in volume and in value, is represented by the Atlantic Salmon (respectively the weight is 48% and the value is 41%) - STECF, 2014-.
Enterprises of sea bass and sea bream are capital intensive and more than 70% of European companies have been classified as micro-enterprises, with fewer than 10 employees
The production of European seabass and seabream has undergone a phase of great stagnation brought about by a financial collapse of many small companies.
The number of companies of seabass and bream has contracted in many European countries (Italy, France, Greece, Spain), although the level of technology and knowledge are really high.
The significant contraction in the number of companies showed disruptive consequences on inactivity: many unemployed workers directly in aquaculture, but many unemployed in the entire connected induced breeding of sea bass and sea bream.
This situation is greatly important for the social and economic instability that generated in each country and, in general, with respect to inactivity/unemployed in the Mediterranean area.
In terms of production, the decrease of the aquaculture number's farm, has negatively affected the performance in Europe, where the supply of sea bass and sea bream is decreased, while on prices and turnover, and have been registered, among the major producing countries of seabass and sea bream, also an increase in the period of great stagnation (STECF, 2014).
If it considers also consumer spending in marine species of aquaculture origin, it shows that within the EU there are reactions / eating habits very different between countries and countries, but also within countries. In some countries, like Italy, the largest amount of sea bass and sea bream farming is absorbed by domestic demand. Unlike the case with other countries, such as Greece, where the propensity to consume of the product raised is lower and larger volumes are for export.

Initiatives

The opportunity to investigate a mature industry, in terms of high technology and knowledge as aquaculture of marine species such as sea bass and sea bream, and to adopt a transversal approach

between the countries involved, will give the opportunity to identify bottlenecks that, in each country and in the Mediterranean region, have hindered the increase of the product offering raised, compared with a deficit of the trade balance of fish products. On the production side, in Europe it is consumed bass and bream, but the propensity to consume of the product of breeding varies widely within the different European countries.
The goal of the case study of sea bass and sea bream is to identify the main difficulties and major challenges for the sector, regarding the opportunity to revive breeding of such species euryhaline.

Case study proposal

All partners orient its contribution according to the most critical points considered important to investigate in order to support, with success, a boost of recovery for the sector in their respective countries.
The partners involved in CS are:

1) The Italian CS: Market oriented production and added value for sea bass and sea bream
   - The Italian sub-case transversal UNIPA
2) The French CS
3) The Greek CS
4) The Spanish CS

Links between CS and WPs

The support and contributions of partners allow to reach the required objectives and planned in relation to the different WP project, specifically:

WP 1: Effects of global drivers, policies and regulations on growth, jobs and innovation in European fisheries and aquaculture sectors: There is no direct link between WP1 and the CS Seabass and seabream

WP 2: Consumer preferences, market acceptance and social awareness towards seafood.

The CS will contribute by providing some insights on:

- Consumers' expectations on aquaculture/euryhaline cultured species, high fresh quality products?
- Investigation on local/regional market (Nisea-Italy)
- Potentiality for new products and new conditioning (Unipa-Italy)

The CS will also participate in the online survey undertaken at European level by specific questions on local, high fresh and eco-friendly products

WP3: Competitiveness and sustainability of European fisheries and aquaculture sectors

Task 3.1: The CS will give an overview of governance and regulation systems influencing competitiveness and sustainability of the EU and for Turkey SB/SB aquaculture sector
Description of aquaculture SB/SB regulation systems under the CFP
France (Ifremer); Italy (Nisea), Spain (UC), Greece (ATEITH), Kilic (TK)
Task 3.2: the CS will give an overview of SB/SB production systems at European level including first hand sales organisations

Description of production systems where initiatives to improve competitiveness and sustainability were undertaken:

- France
- Spain
- Greece
- Italy (Nisea Coord.)-The Unipa
- Turkish fish farm Kilic

Others: What are the gray areas that represent the vulnerability of sea bass and sea bream aquaculture in Europe? (WP3, WP4)
The inefficiencies of the sector are linked to the structure of production costs? (WP3)
It can borrow the pipes and procedures that will emerge (if necessary) by comparison with the Turkish company? (WP3)

WP4 Trade and Value Chain
There is room for development of new markets? What are the perceptions of the product raised (in general) on the part of European consumers? How are consumers of sea bass and sea bream? What is the importance of certifications? Are most appreciated by consumers international certifications (ISO, EMAS, Friends of the Sea, WWF - ASC certification) or private labels? What is the willingness to pay for the product certified? (WP2, WP4)
Market has bass and sea bream organic? What are the new commercial channels? (WP4)

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