THE EXTENSIVE CARP AQUACULTURE IN CENTRAL EUROPE
Typical strategies of the Polish carp farms identified in EU SUCCESS project

CARP PRODUCTION IN POLAND

Carp has been known in Poland for 800 years and it is a very important species for Polish nation especially on Christmas Eve. The area of ponds - 90 th. ha and 20 th. tons of carp production - has given Poland the leading position in the EU (7th in the world). Carp farming is seen as very traditional, extensive and sustainable, characterized by 2-3 years of production cycle which is dependent on the climatic conditions.

MARKET SUPPLY

Domestic market deliveries are rather stable, reaching around 22 th. tons. Over 80% of demand occurs in December as traditional Christmas Eve meal. Dominant sale form is live/fresh fish.

TYPICAL CARP FARMS IN POLAND

733 farms have delivered statistical financial reports. 3 typical carp farms, chosen from the total number, have been identified and assessed according to Agri Benchmark approach on the basis of production volume, cost structure and typical behaviour. As for a typical farm there has been set production level at 0-20 tons (FCP-10), up to 20-150 tons (FCP-100) and over 200 tons (FCP-200). In the Central Europe, middle (>20 ha) to large scale farms (>100 ha) dominate the sector.

TYPICAL FARM BEHAVIOURS

Behaviour has been determined by conditions like: farm size (total), pond area, local economy development, neighbourhood, touristic activity, owned assets, skills of a farm owner, family inclination to help in business, position in value chain, productivity, distribution channels, etc.

STRATEGIES

According to described behaviours and economic performance three typical strategies in carp farming business have been identified:

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<tr>
<th>Activity/ farm’s typical behaviour</th>
<th>FCP-10</th>
<th>FCP-100</th>
<th>FCP-200</th>
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<td>Complementary services</td>
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<td>Spatial expansion</td>
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<td>Local distribution</td>
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<td>Whole cycle of production</td>
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<td>Own maintenance</td>
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<td>Self and family employment</td>
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<td>Own transport</td>
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<td>Natural feeding</td>
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<td>Combined with feed production</td>
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Price (EUR)          2.74       2.86       2.74
ROS - Return of sales (%) -4.7       12.5      9.5
% of local distribution 100       40        5
Complementary services Yes       Yes       No
Identified strategy     Part time /hobby Diversification Scale effects

Part time – focused on local market and complementary activities, fish production as additional activity,
Diversification – numerous distribution channels and development of complementary activities, basic processing plant as a factor of expansion,
Scale effect – specialization, focused on production and distribution on global (national) market.

CONCLUSIONS

1. Domestic market capacity limits the scale of farms, production intensity and a chosen strategy.
2. Traditional carp supply chains in Poland are short and focused on domestic or even regional markets due to a very small share of processed products.
3. Diversification of fish farming activities by putting emphasis on angling, catering and recreation development is one of the most common ways to increase sales revenue and financial performance of a medium farm.
4. The described strategies for each type of a farm are widely used and supported by local tourist and fishing organizations as an optimal way to maintain production.
5. Scale of production determines costs structure which is an important factor of the distribution strategy model. With higher production scale the share of capital cost increases, while labour cost decreases.
6. Development of processing and packaging (MAP) technology and promotion of carp as healthy, convenient, ‘all-year’ product is a way to increase demand.

REFERENCES


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