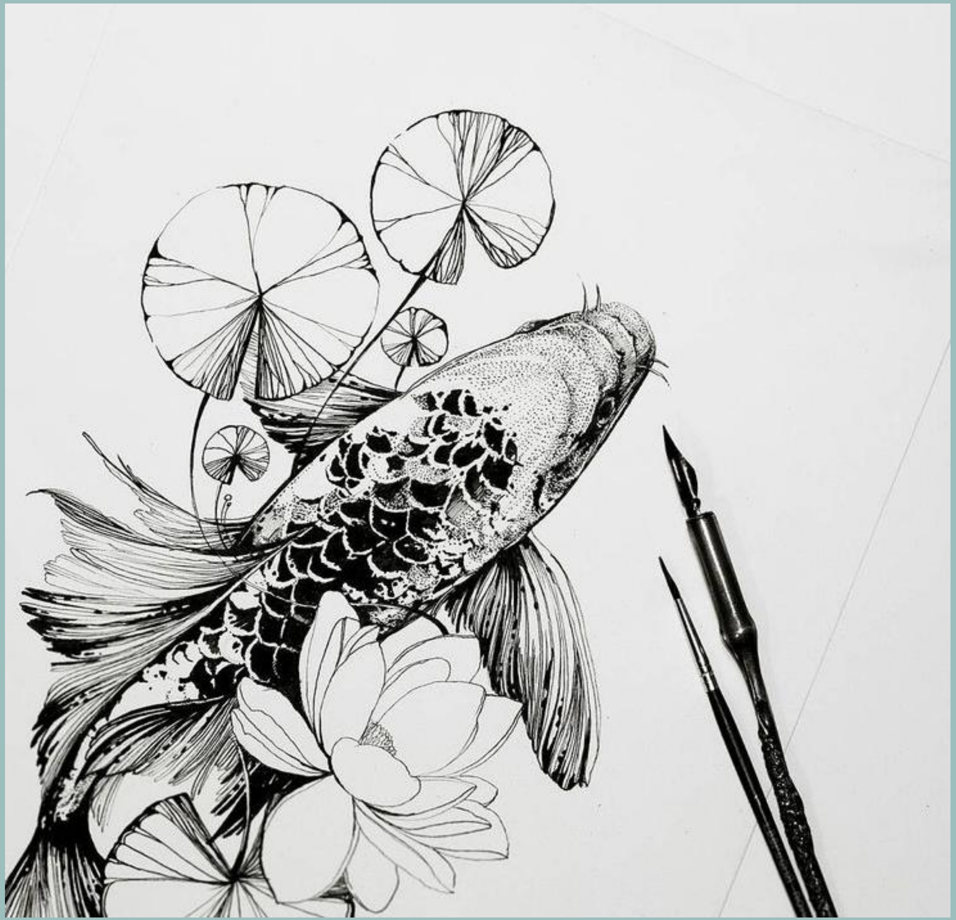

ITALIAN ORGANIC AQUACULTURE: CHANCE OR CHALLENGE?

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crea
Consiglio per la ricerca in agricoltura e l'analisi dell'economia agraria

mipaaf
ministero delle politiche agricole alimentari e forestali

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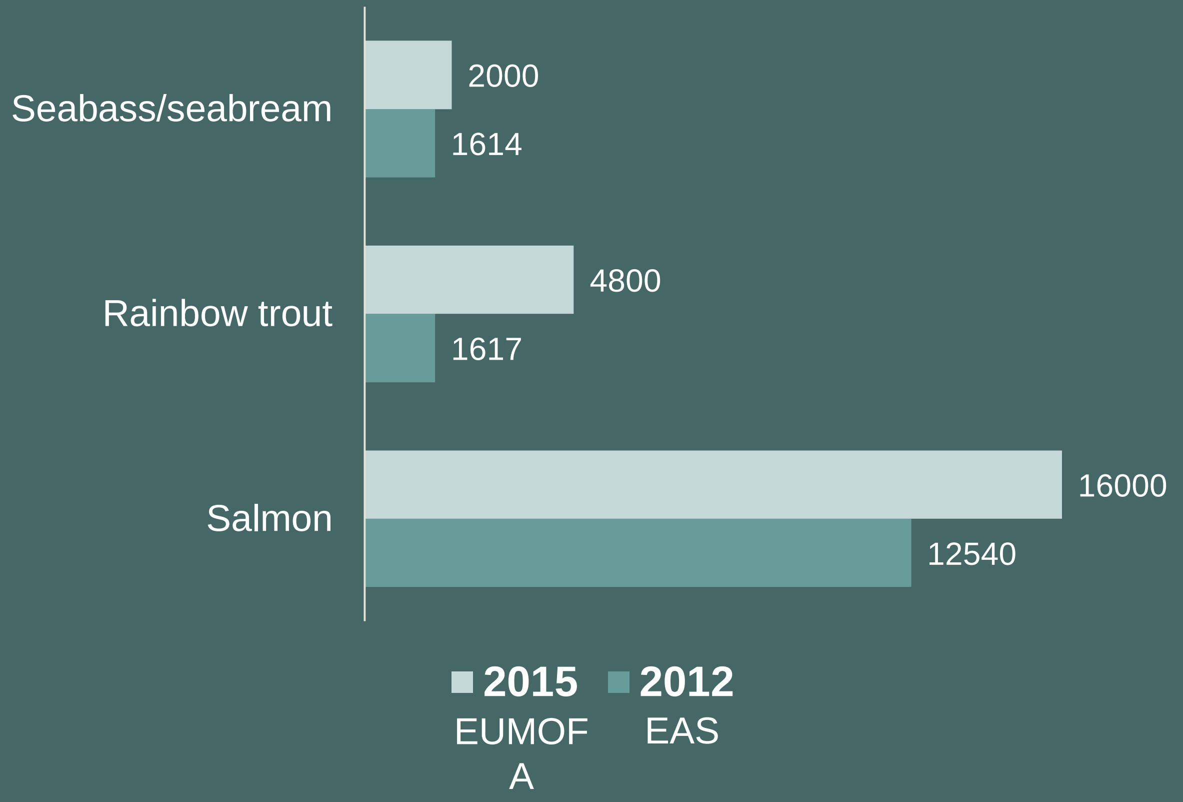
AQUAFARM

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

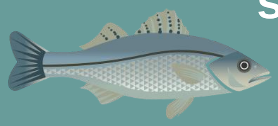


Species	Production 2015 (t)
Mytilus galloprovincialis	20,000
Salmo salar	16,000
Cyprinus carpio	6,000
Oncorhynchus mykiss	6,000
Dicentrarchus labrax, Sparus aurata	2,500

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

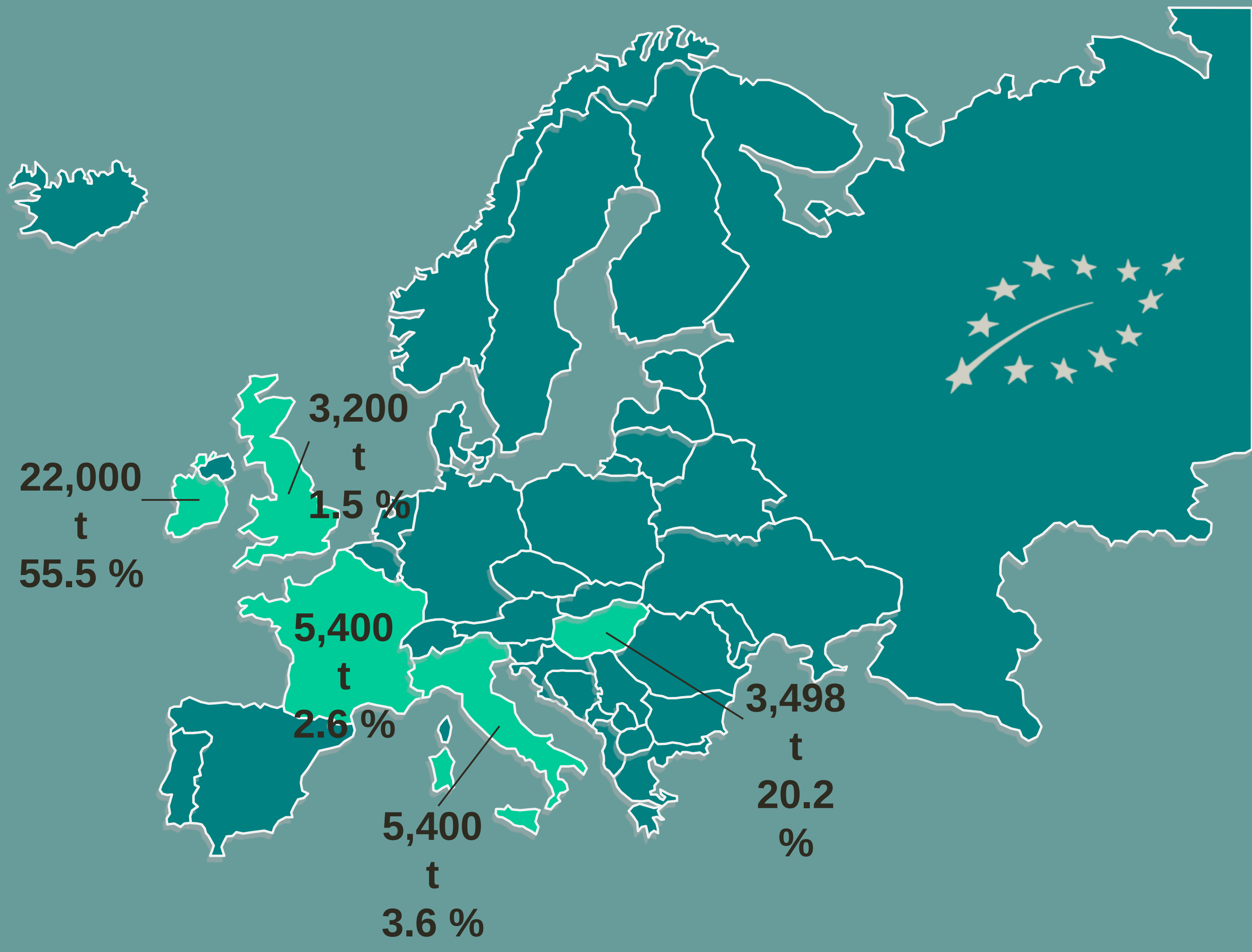
Organic mussel farming developed recently
20% price premiums
Strong demand

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

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 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

Auchan
coop
CONAD
ESSELUNGA
SELEX GRUPPO COMMERCIALE
naturasì bio per vocazione

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

MOVIMENTO CONSUMATORI
CITTADINANZATTIVA
Federconsumatori Difendiamo valori
ADICONSUM Associazione Difesa Consumatori e Ambiente promossa dalla CISL
ALTROCONSUMO
Adoc

QUESTIONNAIRE AIMS

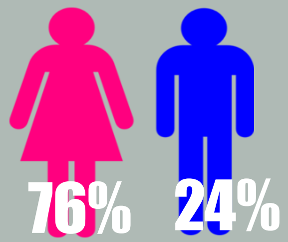
Outline the Italian consumer of farmed fish

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

Nord 37%

Centro 46%

Sud 17%

* PRELIMINARY OUTCOME BASED ON 7300

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
<u>organic fish</u>

NO	YES
33.5%	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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