Fish market and quality strategy in Ancona: a support for sustainable fishing

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Abstract
The need for sustainability has proved to be increasingly relevant in the last few years and since the 1992 Rio Conference has found an adequate normative response in many areas of human activity, with appropriate measures being taken. It is now urgent to find suitable methods for the fishing sector too.

Modern consumer awareness of and attention towards the quality of products have given the market new momentum in the exploration of ways to ensure product traceability and improved information through certification.

This case study aims at presenting the strategic market choices taken by the Ancona fishery, based upon the quality certification of the fish product, with quality giving economic advantages and being an incentive to reach sustainability within the sector.

1. General framework

The sustainability objectives referring to fish as a natural resource can be included in the general management objectives of reducing fishing effort indicators, which aim at reducing overexploitation of the main fish stocks, as well as regulating not only catch volumes but also the equipment and techniques used for the fishing activities. This adds to the overall uncertainty about the real conditions of stocks especially in the Mediterranean Sea, which is characterized by the presence of many different species, each with its own peculiar evolution dynamics.

From the point of view of the market the objective is to improve the value of fish products and at the same time maintain productivity of the sector operators. Product enhancement covers a large variety of concepts, ranging from food safety, product traceability, quality and overall consumer satisfaction. In the light of new events such as the BSE crisis or the market expansion of genetically modified organisms, modern consumers have become increasingly aware of the problems linked to food safety and try to defend themselves from the related risks by choosing products that are guaranteed and marked with quality labels.

The concept of responsible management of fisheries has therefore to be intended as both as sustainable management, i.e. aimed at maintaining the quality, availability and diversity of fish resources in sufficient quantities for present and future generations, and as management from an economic point of view, within the framework of food safety, poverty reduction and long-lasting development.

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The community market has started dealing with these aspects with the implementation of the new regulations (EC Reg. no. 104/2000, EC reg. no. 2065/2001) on the marketing of fish products, which are included in the more general framework of the Common Fisheries Policy (CFP). The market evolution that these regulations aim to achieve bring producers and consumers closer, as it focuses on the quality of products and the identification of their origin as tools of competitiveness and sustainability for the fishing activity.

EC Regulation no. 104/2000 aims at guaranteeing a new balance between supply and demand, strengthening competitiveness of the transformation industry and increasing information available to consumers on the availability of fish products on the market. This document is based on a whole series of considerations on the ongoing evolution in the fish sector and, more generally, on the main guidelines of the common fisheries policy. It is therefore evident that from the point of view of the EC the implementation of a common market organization, also including eastern European countries in the future and thus Adriamed countries too, can favour the stability of the same markets, the qualitative and quantitative adjustment of supply to demand, the enhancement of products on the market, the improvement of production profitability, as well as a smoother implementation of sustainable development.

From the new viewpoint of the common market, Producers’ Organizations (PO) represent the supporting elements of the same common market and have acquired a fundamental importance thanks to the new regulation: they should guide the production of their members according to market needs, thus adjusting supply to demand and favouring the optimal valorisation of catch in order to achieve a rational and sustainable use of resources.

This is probably one of the major innovations for Producers’ Organisations, which now have the task to decide upon an “operative programme” every year at the beginning of a fishing campaign; the programme is made up of a number of forecasting measures, which are mainly aimed at planning the assigned quantities and regulating supply in advance, so as to adjust catch to market needs. The planning of fishing means avoiding the capture of species that are scarcely demanded or not demanded at all. Producers must foresee market needs not only in terms of quantity, but also in terms of quality and regularity of supplying. More regular and better quality fish landings will result in advantages for producers in terms of prices, for dealers in terms of supplying and for consumers in terms of a better quality/price ratio. To this end, EC Regulation no. 2065/2001 foresees the implementation of common marketing norms for fishery and aquaculture products starting from 1st January 2002. For fresh or frozen products, in particular, the higher degree of diversification of the offer forces producers to provide consumers with a minimal amount of information on the main characteristics of their products.

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1 The need for a new regulation was also stressed in the Green Paper on the future of the CFP, which in particular asks to pay more attention to the aspects of safety and public health in the field of fisheries in order to guarantee consumer protection.

2 Producers’ Organizations are made up by fishermen or fish breeders, who freely get together in order to adopt measures aimed at guaranteeing the best marketing conditions for their products. Joining these organizations is voluntary and their creation dates back to the first years of the common fisheries policy in 1970. The definition given of “producers’ organization” in the EC regulation no. 104/2000 is that of any juridical subject, set up upon the initiative of a group of producers of one or more products, whose aim is in particular to ensure the carrying out of a rational fishing activity and the improvement of the sales conditions of its members’ products.
In order to facilitate the identification of fish products throughout the whole commercialisation process, the same products will be accompanied by a document containing three main pieces of information: the species’ commercial name (or, together with it, also its scientific name), the production method (fishery or aquaculture product) and the area where it has been caught.

2. Ancona’s Adriatic Fishery

Ancona’s fishing sector has developed from 1940 until today thanks to the work of the “Cooperativa Pescatori Motopescherecci” (1941), which for long time has acted as head and reference point. The cooperative was then followed by the “Associazione Produttori Pesca” (1973) and “Consorzio Pesca Ancona” (1993). The clam sector gave itself in turn its own organization thanks to the creation of the Consortium “Co.Ge.Vo.” Ancona s. r.l. (1995).

The Ancona fishery is today managed by three cooperatives:
- The Association (Organization) of Producers;
- The Consortium, which represents a commercial cooperative and includes all fishing companies that are member of the Association of Producers;
- The Cooperativa Motopescherecci, gathering all operators of the fishing sector (from ship-owners to fishermen).

All fish caught by the fishing companies is placed on the market along three main channels, which are the following:

1. Fish market managed by the company Mer.it.an. Almost 60% of the fish of bottom trawlers is marketed through this market (demersal species and sometimes small quantities of pelagic species), with average sales of approximately 7 million Euro. Sales are made by rising auction and take place only in the morning from Tuesday to Friday; buyers are mainly the small local retailers.

2. Fish market managed by Consorzio Pesca Ancona. This is the market for 100% of pelagic catch, 40 % of the catch of bottom trawlers and 100% of clams. Fish is sold to Italian wholesalers and EC dealers (mainly from Spain, Greece and France), as well as to the large scale distribution (e.g. to the Italian COOP); sales are made by rising auction and take place only in the afternoon from Monday to Friday. The consortium is in charge of the commercialisation of the fish of Ancona’s 72 companies, as well as of the production of the 5 fishing vessels of the Fano fishery, which operate in Ancona.

3. Other markets. A small quantity of production is marketed at seasonal intervals on the municipal markets of Pesaro and Cattolica where sales are made by electronic falling auction.

In compliance with the EC Regulation no. 104/2000, the Ancona fishery manages its own fishing activity through an Annual Operational Plan. Fleet production includes anchovy, sardine, mullet, hake, red mullet, cuttlefish, sole, spotted mantis squillid and clam. The fishing activity is carried out on mandatory days at fixed hours, going from Monday morning at 5 am to Thursday at 10 pm (in case of bad weather conditions any fishing days missed may by caught up on Friday).

In order to achieve a certain balance between supply and demand, thus reducing the risk of a collapse of prices and to ensure the correct management of resources, the fishing of pelagic
species takes place on 4 days of 15 working hours each every week, (unless recovery days are required). Owing to the strong demand from Spain and Greece for fish, one additional day of fishing activity every month is foreseen during the months of February and March. For demersal species, 72 fishing hours per week are foreseen, unless hours have been missed. From September to December the number of fishing hours may be reduced in the case of bigger catches. Furthermore, the Ancona fishery has always been in favour of, and currently implements, a “biological closure” each year for fisheries carried out with bottom trawlers and for the catch of clams.

The marketing strategy adopted during the 2001 fishing season by the Producers’ Organization of Ancona involved both pelagic and demersal species. The Producers’ Organization applies EC purchase prices and below such prices it commits itself to collect the products from the market in order to obtain the transfer aid.

Catch quotas have been defined for all pelagic species, whose sales must be made by auction on the market managed by Consorzio Pesca. This allows control over fishing days and quotas foreseen by the catch plan, as well as the certainty of operating on a stable market. The concentration of all production into a single distribution channel also facilitates the system of control foreseen by the quality improvement plan, which was implemented by Consorzio Pesca in 2001.

Also the marketing of demersal species is carried out by auction and it generally does not face any particular market difficulty; it is however necessary that in periods of greater catch (from September to December) some fishing vessels provide their production directly to the market managed by Consorzio Pesca so as to keep prices constant against the framework of a remarkable growth in supply. This is because demand is extended to the national, EC and big distribution markets, which are for example very poorly represented in the Mer.it.an.

Since January 2001 Consorzio Pesca has implemented a quality improvement plan thanks to the creation of the Quality Label “Fresh Quality Fish – Consorzio Pesca Ancona”. The label is based upon disciplinary measures, which provided for the adoption of a self-control plan for the protection of hygiene norms during the various phases of fishing activity. By adhering to the disciplinary norms, producers commit themselves to guarantee that their fishing vessels comply with certain technical and structural prerequisites and to adopt standardised and hygienically controlled fishing procedures, in order to offer the market a quality-controlled fish product of higher commercial value.

The above-mentioned disciplinary measures require producers to implement the following actions:

- **Improvement of safety and health on board the fishing vessels**: measures and training courses, which are aimed at improving the life and working conditions on board the vessel, including the provision of specific clothing items, such as wetsuits, boots for bridge and below deck;
- **Use of high-tech machinery and equipment, also to promote quality and hygiene.** In particular, it is necessary to guarantee the following: adequate systems of catch refrigeration and conservation (storage rooms, chilled water and ice production), provision of homologated bays, proper tables etc.;
- **Guarantee of high quality products with the denomination of origin**: identification of the fishing area (sea zone between Pesaro and Pedaso, in the strip between 3 and 20 miles from the coast) and respect for the limits set;
Certification of product quality, which is aims to improve supply to the markets, as well as normalizing the conditions under which fish products are stocked, processed, transported and landed. The Veterinary Service of the Ancona Local Health Unit “U.S.L. no. 7” acts as quality guarantor and controller, thereby carrying out daily controls and checking the implementation of procedures and the products on sale.

- Improvement of hygiene and safety conditions for the health of workers: norms on landing activities, fuelling and maintenance of fishing boats in case of docked vessels, execution of port operations and services, marketing activities and operations of product processing in the port through the provision of vehicles for ice transportation, homologated loaders, boards, food polyethylene;
- Guarantee of environmental quality: this is to be implemented through quotas of reduction of both catch and fishing days;
- Implementation of the self-regulation system as an organization procedure aimed at achieving high quality standards in the production process: this is to be implemented through counselling, training and the use of hardware and software equipment for the management and development of procedures;
- Accessory Information Technology activities and equipment for analysing and maintaining the Quality Label: this is to be achieved through the hiring of personnel responsible for project control and implementation, as well as the purchase of IT equipment;
- Training and information on product hygiene, safety and health: this is to be implemented by organizing proper training courses;
- Information and dissemination campaign on the product: this is to be achieved by means of specific publications and advertisements.

The Quality Label realized by Consorzio Pesca is a collective label, which unites all operators of the Ancona Producers’ Organization. Consorzio Pesca’s strategy for the near future is to offer the market a certified product, which is thus guaranteed by a third Certification Body.

3. Analysis of fish markets of the Ancona fishery

The study of the catch and price trend within the Ancona fishery has been carried out with reference to the two local fish markets, the one managed by Mer.it.an and the one run by Consorzio Pesca. The resulting data refer to the overall situation of the fishery. After a first analysis of the trends, attention was focussed on Consorzio Pesca’s fish market, trying to evaluate the repercussions on catch and prices caused by the introduction of the Quality Label. Data were provided by Ismea for the Mer.it.an market, and by Consorzio Pesca itself through its monthly reports for the corresponding market. The data that have been analysed refer only to “closer coastal fisheries”, which is characterized by the use of bottom trawls and floating nets; all information referring to “local coastal fisheries” and the fishing of clams, which represents an independent sector of the fishing activity, have not been considered in the survey. Table 1 shows the summarized data referring to the fish market catch and sales of the Ancona fishery from 1998 to 2001 respectively. In the four years examined average catch quantity is around 9,000 tons per year and sales amount to approximately 16 million euros.
Approximately 86% of catch is commercialised on the Consorzio’s market, whereas the remaining part is sold on the “Mer.it.an” market. Sales are more or less equally distributed between the two fish markets, with Consorzio Pesca making up for about 55-56% of the total with the exception of 2001, in which the corresponding figure was over 60% (Figures 1 and 2). In 2001 about 80% of total catch refers to pelagic fish with total sales of over 7.6 million euros (45% of the total with a rising trend); over the years, sales of demersal fish have increased too, and even if these species have been characterized by markedly lower catch in comparison to pelagics (12% in 2001), the total sales registered amount to about 5.1 million euros (31% of the total), thus showing a strikingly higher collective value. The catch figures referring to crustaceans and molluscs are more or less the same, but the former have registered higher sales (2.3 million euros in 2001), which has varied over the years; sales of the latter have remained more or less constant – 1.6 million euros. In quantitative terms, figures referring to 2001 catch are as follows: about 7,000 tons for pelagic fish, all marketed by Consorzio Pesca, which holds the monopoly; a figure slightly higher than 1,000 tons for demersal fish, more or less equally distributed between Mer.it.an and Consorzio; approximately 400 tons and 300 tons for crustaceans and molluscs respectively.

Figures 1 and 2. Catch and sales of the Ancona fishery.
Table 1 - Catch and sales of the Ancona fishery

<table>
<thead>
<tr>
<th></th>
<th>Annual catch of the Ancona fishery (tons)</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>1998</td>
<td>1999</td>
<td>Var. 98/99</td>
<td>2000</td>
<td>Var. 99/00</td>
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<tr>
<td>Pelagic marine fish</td>
<td></td>
<td>8.815</td>
<td>6.150</td>
<td>-30.2%</td>
<td>7.200</td>
<td>17.1%</td>
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<tr>
<td>Demersal marine fish</td>
<td></td>
<td>1.411</td>
<td>1.250</td>
<td>-11.4%</td>
<td>1.204</td>
<td>-3.7%</td>
</tr>
<tr>
<td>Crustaceans</td>
<td></td>
<td>387</td>
<td>456</td>
<td>17.9%</td>
<td>465</td>
<td>1.8%</td>
</tr>
<tr>
<td>Molluscs</td>
<td></td>
<td>375</td>
<td>332</td>
<td>-11.3%</td>
<td>310</td>
<td>-6.8%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td><strong>10.988</strong></td>
<td><strong>8.189</strong></td>
<td><strong>-25.5%</strong></td>
<td><strong>9.179</strong></td>
<td><strong>12.1%</strong></td>
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<thead>
<tr>
<th></th>
<th>Annual sales of the Ancona fishery (000 euros)</th>
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<tbody>
<tr>
<td>Pelagic marine fish</td>
<td></td>
<td>7.745</td>
<td>4.990</td>
<td>-35.6%</td>
<td>6.557</td>
<td>31.4%</td>
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<tr>
<td>Demersal marine fish</td>
<td></td>
<td>4.332</td>
<td>4.068</td>
<td>-6.1%</td>
<td>4.613</td>
<td>13.4%</td>
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<tr>
<td>Crustaceans</td>
<td></td>
<td>2.325</td>
<td>2.524</td>
<td>8.6%</td>
<td>3.074</td>
<td>21.8%</td>
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<tr>
<td>Molluscs</td>
<td></td>
<td>1.607</td>
<td>1.607</td>
<td>0.0%</td>
<td>1.743</td>
<td>8.4%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td><strong>16.009</strong></td>
<td><strong>13.190</strong></td>
<td><strong>-17.6%</strong></td>
<td><strong>15.987</strong></td>
<td><strong>21.2%</strong></td>
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</thead>
<tbody>
<tr>
<td></td>
<td>Mer.it.an</td>
<td>1.481</td>
<td>1.224</td>
<td>-17.4%</td>
<td>1.252</td>
<td>2.3%</td>
</tr>
<tr>
<td></td>
<td>Consorzio Pesca</td>
<td>9.506</td>
<td>6.965</td>
<td>-26.7%</td>
<td>7.927</td>
<td>13.8%</td>
</tr>
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Source: Finco (unpublished)

When considering total catch composition from 1998 to 2001, it can be noted that the percentages relating to the single fish categories are almost constant: pelagic fish make up about 80%, demersal fish on average for 13%, whereas the remaining quantity is more or less equally distributed between crustaceans and molluscs (Table 1).

The year 1999 represented an unusual case, as it was characterized not only by the usual biological closure, but also by a stop to the fishing activity due to the war\(^3\) for almost 3 months in total. The most evident consequence of the prolonged closure was a quantitative reduction of catch of pelagic fish: as a matter of fact, catch diminished by about 2,700 tons with a corresponding variation of 30.5% in comparison to 1998. The change for demersal fish was less significant, with a variation of 11.4%.

The analysis of total catch of the Ancona fishery over the years shows a slight falling trend: irrespective of the 25% reduction in 1999 because of the prolonged closure of the fishing activity, the 2000 recovery was only 12%, and a further 4% reduction was registered in 2001. This shows that catch figures have not been able to come back to the levels of 1998 (Table 1, Figure 1).

Generally speaking, however, catch reduction affected all fish species, especially crustaceans (-13.1% in 2001), then demersal fish (-9.2%) and eventually pelagic fish too (-2.6%). Molluscs did not follow this trend and registered a 2.6% increase in catch.

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\(^3\) The third quarter of 1999 was characterized by a reduction of the activity for fisheries with bottom trawls and floating nets, owing to the war closure that lasted from 14\(^{th}\) May to 31\(^{st}\) August.
Furthermore, the fall in total catch was not homogeneously distributed between the sales carried out on the two fish markets. In comparison to the year 2000, the Mer.it.an market registered a drop in catch of over 13%, whereas Consorzio Pesca suffered a reduction of slightly more than 2%.

Against the background of these data two remarks can be made: on the one hand the fall in catch may be the result of normal population dynamics; on the other hand the slight 4% reduction registered in the last year may be the consequence of a policy, which is more focussed on sustainability and where market objectives do not lie in the increase of caught quantities, but rather in the quality of the offered products. Besides, the difference between the two markets could imply that quantities caught, and thus also sales, are now shifting towards Consorzio Pesca, i.e. towards quality and large scale distribution.

The analysis of the annual sales of the fish markets of the Ancona fishery (Table 1) stresses that sales exceed on average 16 million euros, with a 4.8% increase registered in 2001 (from 15.9 million euros in 2000 to 16.7 million euros in 2001). The same trend is reflected, even if in a different way, by the sales of the single fish markets: while the Mer.it.an market has more or less maintained its value 7 million euros (and even if a slight decrease was registered in 2001), Consorzio Pesca has seen its revenues increase over the years, reaching over 10 million euros in 2001.

The analysis of the sales of the last four years shows that the 17.6% reduction that was registered in 1999 because of the prolonged closure was then largely recovered thanks to the 2000 sales (+21.2%) and to the 4.8% increase in 2001. Yet this growth was not evenly divided between the two fish markets, rather it showed remarkable differences between the two. In the 1998/1999 variation, the fish market managed by Mer.it.an lost about 13.5% in terms of sales (from 7 to 6 million euros), whereas the loss suffered by Consorzio Pesca was much more substantial, amounting to 20.8% (from 9 million euros in 1998 to 7.1 in 1999).

The 1999 sales loss was recovered in 2000 in a much more evident way by Consorzio Pesca (+26.4% in sales) and in a much less decisive way by Mer.it.an (+15%). The fundamental difference was registered in 2001: in this year sales by Consorzio Pesca continued to go up by 12.1%, whereas those by wholesale market went down again by 4.5%.

The differences emerging from the comparison between the sales by the two fish markets in the Ancona fishery are evidence of the fact that over the last few years something has changed in the management of sales, and that this is not to be attributed to a different type of purchasers alone. Irrespective of the catch trend, the sales tendency shows the strong influence exerted by the Consorzio on the economy of Ancona’s fishery, with this influence being felt even more if we consider the 12.1% increase in 2001 in relation to the new quality-oriented policy.

In order to highlight the market trend or in any case evaluate the effects of the introduction of the Quality Label by Consorzio Pesca, it is particularly interesting to analyse the development of catch and sales of this fish market, as shown in Table 2 and in the Figure 3 and 4.
Pelagic species are the main product of this fish market. In 2001, these species registered almost 7,000 tons of catch (89% of the total) for total sales of 7.5 million euros (74% of the total). While the quantities of these species fished registered a fall of over 20% against 1998, the corresponding sales decreased by only 1.6%, thus testifying to a certain price increase. The catch trend registered for demersal fish has been more or less constant in the four years
examined (-6.4% in comparison to 1998), while molluscs and crustaceans have shown more variable trends. Considerable increases have been registered for all these categories of fish. On the basis of these considerations it is particularly interesting to analyse price percentage variation between 2000 and 2001 in relation to catch variation. This allows some remarks to be added on the implementation of the Quality Label and to check the strategy of a price increase of the product from the point of view of an optimal management of the resource itself (Table 3, Figure 5).

Table 3 - Quantity, average price and sales of the main pelagic species of Consorzio Pesca Ancona.

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<tbody>
<tr>
<td></td>
<td>Tons</td>
<td>Euro/kg</td>
<td>Sales (000 euro)</td>
</tr>
<tr>
<td>Anchovy</td>
<td>5.918</td>
<td>0.99</td>
<td>5.874</td>
</tr>
<tr>
<td>Sardine</td>
<td>979</td>
<td>0.48</td>
<td>470</td>
</tr>
<tr>
<td>Mackerel</td>
<td>84</td>
<td>0.73</td>
<td>62</td>
</tr>
<tr>
<td>Total Pelagic  Marine Fish</td>
<td>7.131</td>
<td>0.91</td>
<td>6.475</td>
</tr>
</tbody>
</table>
| Source: Finco (unpublished)

Figure 5. Percentage variation of catch and prices of the main pelagic species.

The data collected show that anchovies are the most represented species from a quantitative point of view (almost 5,000 tons in 2001), followed by sardines (almost 1,300 tons in 2001). The reduction in total catch, which was unequally distributed between fish species (-11.4% for anchovy, -39.3% for mackerel and +36.4% for sardine respectively), was counterbalanced by a general increase in prices, with positive repercussions on total income (+16.4%). The 19.6% growth in the average price of pelagic fish (from 0.91 to 1.09 euro/kg), is divided into single increases, which are more than proportional in comparison to the catch percentage variations; in this framework the 82% increase in the price of mackerel (from 0.73 to 1.34 euro/kg) and the 25% increase in the anchovy (from 0.99 to 1.24 euro/kg), leading to a sales growth of 10.7% and 11.1% respectively, are particularly significant. This tendency towards price
growth may be due to various causes: partly to the market law that leads to a price increase after a reduction of the quantities offered, partly to inflationary phenomena, and partly also to the introduction of the Quality Label, which brought about a further improvement in the value of the whole supply chain. To support these considerations, the graph illustrated in Figure 6 shows the increase in sales to the large scale distribution that was registered by Consorzio Pesca in the first nine months of 2001; the positive trend is clear. The higher profits obtained on the market by quality products as against conventional products could thus make up for the lack of profits due to minor catch and, as a consequence, to a minor fishing effort. On the other hand it should not be underestimated that, according to the law of demand, a price increase is accompanied by a proportional adjustment of supply in the medium term, that will have to be avoided through the regulation of the sector: this regulation will in any case have to be taken into account by the qualitative disciplinary measures of Consorzio Pesca. The problem of fish imports from other markets, especially from foreign ones, still remains open. This is a variable, which will necessarily have to be taken into consideration in the drafting of any future strategy.

![Large scale distribution](image)

Figure 6. Trend fish sales from Consorzio Pesca to the Coop distribution chain.

### 4. Conclusions

By way of conclusion it can be stated that the supply of a high quality product, marked with a label, can represent an excellent strategic choice from the point of view of both market and marketing, as well as an ideal support to achieve sustainability in the sector. The use of a label of origin could also be extended to a wider geographical area, like the entire Adriatic basin. The analysis of the economic results of Consorzio Pesca’s Quality Label clearly shows that the large-scale distribution plays a fundamental role through its supply chain approach, as it supports the promotion of the product and guarantees the respect of the final standards of quality and correct information towards consumers (advertising). The study has in short stressed that a quality strategy can help achieve three simultaneous objectives: consumer satisfaction, thanks to the provision of a guaranteed, well recognizable and high quality fish
product; the achievement of producers’ economic objectives, as producers are able to apply a higher price; and lastly, a sustainable use of fishery resources, which are in this way subject to an optimal management regime.

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