

REVIEW OF FISH PRODUCERS' ASSOCIATIONS IN EASTERN EUROPE

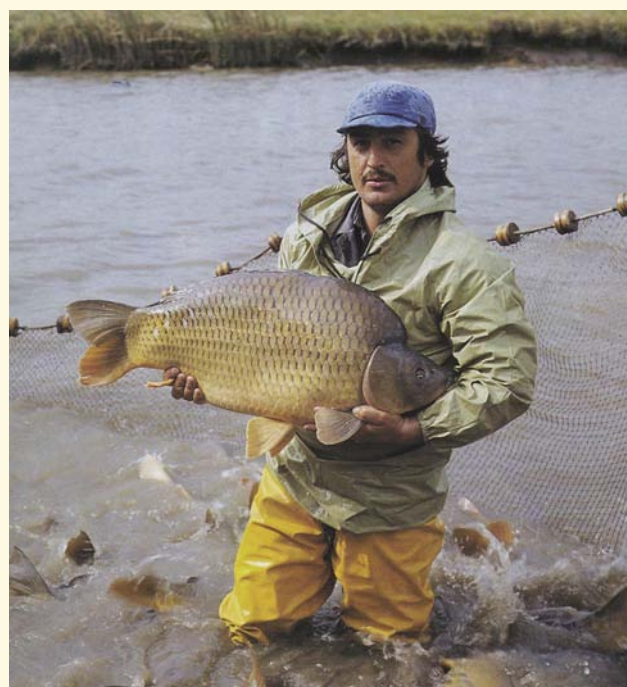
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Background

The last ten years have brought substantial changes in Eastern Europe on political and economic levels, resulting in radical changes in many sectors as well as in aquaculture. Fish farms had to overcome the difficult process of transition to market economy, during which their characteristics and the market of their products have drastically changed. The process of the transformation was slowed by the fact that most farms had first to solve their liquidity problems arising from the economic difficulties associated with the political changes. In addition, the farms had to operate in continuously worsening market conditions. Compared to the decades of centrally planned economy when they based their production on secure state orders, now they had to face conditions of increasing competition. Privatisation eliminated most of the previously existing large state-owned fish farms, and led to the appearance of new, privately owned and family enterprises. The assets of the existing farms were often acquired at low prices by companies or private owners who were subsequently unable to utilize their capacities or warrant profitable operation due to lack of competence, financial and other reasons. In spite of that, they increased competition to other farms.

At the same time, policy-makers of some Eastern European countries, especially the landlocked ones, still regard fisheries and aquaculture as a low-priority sector of the national economy.

As a result of these factors, aquaculture producers in these countries gradually realized that they needed a new type of cooperation, which would allow them to act jointly to achieve their common objectives. Obviously, this process did not happen simultaneously in the different countries of the region. In the Czech Republic, Hungary or Poland, producers' associations are well-organized, strong and active on both national and international



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Carp breeding



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Pond fish farming and carp breeding (see photo previous page) are dominant in the Eastern European Region

levels. In contrast, in most Eastern European countries, the level of development of these associations is still low or their formation is only beginning now.

The purpose of this paper is to give a brief overview on the state of development of producers' associations in Eastern European countries, and to invite response by readers, in particular, on additional information they may have on producers associations in Eastern Europe or in other regions.

Development of producers' associations in Eastern Europe

As mentioned above, producers' associations in Eastern European countries are at very different stages of development. They can be broadly classified into the following developmental stages:

- In some countries, there are no producers' organizations and even the structural reorganization of the fisheries sector, which would create the basic conditions for their development, is starting only now. Such is the case of the Republic of Belarus, where the 20 major fish farms are owned by the state and operate under the authority of the Ministry of Agriculture. Although their transformation into stock companies is under process since 2003, the state remains the majority owner of the shares.
- In other countries, the existing producer associations are organised in a top-down direction and are run by the state. A typical example is the Association of Fish Farms of Inland Waters of Ukraine, which is an affiliation of the State Department of Fisheries. Another example is the State Cooperative Association for Fisheries ("Rosrybkhoz") in Russia, which serves as an umbrella organization for over 700 state-owned or private aquaculture enterprises. Currently, the organizations united by the Rosrybkhoz produce over 90 percent of the total production of intensive and pond farms. Recently, steps have been taken in Russia toward forming producer associations of a new type, like the Association of Inland Water Fish Culture Enterprises and Aquaculture ("Rybkhozassotsiatsiya") established in 1993. Its membership currently consists of 32 fish production enterprises and 8 research institutions, and it aims mainly at organization of training courses for fishery professionals and development of collaboration among the members and on an international level.
- In Bulgaria three aquaculture producer associations were founded in the last seven years and the formation of a fourth one is in progress. The oldest of these organizations is the National Association of Fishery and Aquaculture in Bulgaria ("Aquafish-BG") that was established in 1998 and has now 36 members including 25 leading Bulgarian aquaculture producers, fish processing and trading companies and 11 independent experts of the sector. The main objectives of the existing associations, i.e. the Aquafish-BG, the Fish Producers' Association (BG-Fish) and the Bulgarian Fish Association, are mostly similar:

- Protecting the rights of their members and the fisheries and aquaculture sector as a whole;

- Improving the national fishery and aquaculture legislation and adapting it to the EU Common Fisheries Policy;

- Strengthening the position of Bulgarian producers on the domestic and international market;

- Improving the international relationships of the sector by closely cooperating with international organizations and participating in international fishery-related events.

- The most advanced fish producers' associations can be found in the Czech Republic, Hungary and Poland. The oldest organization, the Polish Fishery Association, was established in 1918, but its activity was suspended in 1939 and reactivated during the early 1990's. The most active one is the Polish Trout Breeders' Association, which is a member of FEAP¹ since 1996, is involved in the organization of annual salmonid farmer meetings and the monitoring of Polish trout production. The Czech Fish Farmers' Association, consisting of 60 members, is a

strong national association which is mainly involved in pond fish production. It is active both nationally and internationally, similarly to the Hungarian Fish Producers' Association. Both associations are member organizations of FEAP. In these countries, previous organizations (e.g. associations of state farms or cooperative farms) served as a basis for the development of new-type producers' associations.

Table 1 provides a list of presently known producers' associations and their contact information.

The Hungarian fish producers' association: a case study

The Hungarian Fish Producers' Association is the organization representing the professional interests of the Hungarian fish production sector. It was established in 1990 as the successor of the Organization of Fisheries Cooperatives, founded in 1957. Since 1990, all natural persons, legal entities, or their affiliated organizations not having legal personality can be the members of the Association. The Association has currently 109 members, who operate about 13,800 ha of fish ponds (65 percent of the total fish pond area), representing more than 75 percent of

Table 1. Fish Producers' Associations in Eastern Europe

Country	Name of Association	Address
Belarus	None	
Bulgaria	1. National Association of Fishery and Aquaculture in Bulgaria 2. The Fish Producer Association 3. Bulgarian Fish Association	1. 3 Luna Str. 4003 Plovdiv, Bulgaria (aquafish_bgass@abv.bg), (nkissov@spnet.net) 2. 1756 Sofia, Technical University, bl. 7, vh. 6 (NTM), Bulgaria (reyafish@mail.com) 3. 3 Industrialna Str. 8000 Burgas, Bulgaria
Croatia	Croatian Chamber of Commerce, Section Aquaculture	Mari Mirna, Giordana Palliage 4, 52210 Rovinj, Croatia (marimirna@pu.tel.hr)
Czech Republic	Czech Fish Farmers' Association	495/58 Pražska, 371 38 České Budějovice, Czech Rep. www.rybsdr.fish-net.cz; (RYBSDR@pvtnet.cz)
Estonia	Estonian Fish Farmers' Association	5 Kaluri tee, 11712 Harju county, Viimsi, Estonia www.ngonet.ee
Hungary	Hungarian Fish Producers' Association	4/b Vöröskő u. 1126 Budapest, Hungary www.haltermosz.hu; (iroda@haltermosz.hu)
Latvia	Latvian Crayfish and Fish Farmers' Association	7-6 Alberta Str. 1010 Riga, Latvia (earens@latnet.lv)
Lithuania	No information	No information
Romania	None	
Russian Federation	State Co-operative Association for Fisheries "Rosrybkhoz"	18a Ermolaevskiy pereulok 123001 Moscow, Russia
Russian Federation	Association of Inland Water Fish Culture Enterprises and Aquaculture "Rybkhozassotsiatsiya"	18a Ermolaevskiy pereulok 123001 Moscow, Russia
Ukraine	Association of Fish Farms of Inland Waters of Ukraine	45a, Artema str., 04053 Kyiv, Ukraine



Utilization of geothermal energy in intensive systems is one of the possibilities of aquaculture development

the total volume (quantity) of fish supplied by the Hungarian fish production sector.

The main governing organs of the Association are the General Assembly, the Board of Directors, and the Control Commission. Two important organizations affiliated to the Association are the Fish Product Council and the Carp Breeding Branch. They are involved in organising the biological and economic bases of the national fish culture. The Fish Product Council suggests limit prices, coordinates marketing activities between producers, processors and traders, and provides information to members. The Carp Breeding Branch, in close collaboration with the Institute for Agricultural Quality Control, the Ministry of Agriculture and Rural Development, and the Research Institute for Fisheries, Aquaculture and Irrigation, is an important player in the planning and implementation of carp breeding programs and standardised carp performance tests. It also assists the members by providing them with technological advice.

The Association owns a fish breeding farm that cooperates closely with several universities and state research institutes and actively participates in putting the results of fisheries and aquaculture science into practice. The farm provides stocking material of good quality to Hungarian producers and plays an important role in the organization of live fish exports.

The main objective of the Association is safeguarding and emphasizing the interests of fish producers. Therefore, the basis of its work is the communication with state

organizations for fisheries, governmental and non-governmental bodies of environmental protection, international fisheries organizations, media and people.

The Association regularly organises professional forum discussions on strategies and actual problems of the sector. It provides advisory assistance to its members in legal, environmental and marketing issues, but also in the preparation of various applications for subsidies and funds. The Association has recently launched a Marketing Communication Program aiming at the increase of fish consumption, with special regard to locally produced fish products.

The Association is also responsible for the maintenance of international contacts for the benefit of its members. It organises study tours abroad, which not only contribute to the professional development of the members but also strengthen their international relationships.

The Hungarian Fish Producers' Association joined the FEAP in 1999.

Perspectives of development

The need for coordinated actions and joint representation of fish farmers is increasing and the positive examples from the activities of existing farmers' associations encourage the establishment of new organizations. However, there is still much to be done in this field. Several countries have only just begun the



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organization of their producer associations and the experiences of their already existing foreign counterparts can help them avoiding the mistakes that the latter might have made.

The situation of the existing associations is often also far from ideal. They frequently struggle with institutional and personal problems, and suffer from lack of recognition and appreciation by policy-makers in their respective countries, and from economic difficulties. The international cooperation and exchange of information and experiences are hampered by the inadequate supply of modern communication means (internet, etc.) and by language barriers which are especially characteristic and particularly problematic for the former Soviet republics.

The improvement of the situation needs, first of all, stabilization of the economic situation and creation of the fundamental infrastructural and institutional background for the operation of producers' associations. But another extremely important task is the improvement of cooperation and information exchange between the producers' associations of the Eastern European region. Better communication is needed to draw the attention of new associations to the possibilities to make use of, the ways to follow and the mistakes and traps to avoid.

NACEE: Possible assistance in improving communication

Recognising the need for better communication and information exchange between Eastern European countries, the Research Institute for Fisheries, Aquaculture and Irrigation (HAKI) in Szarvas initiated the creation of a network that would promote cooperation and information exchange between fisheries-related institutions and organizations of the region. The Network of Aquaculture Centres in Central-Eastern Europe (NACEE) was established in 2003 and already counts 19 members from 13 countries. Although NACEE is an inter-institutional network of aquaculture R&D and training institutions, one of its main objectives is to enhance partnership between science and producers. It provides a good framework for solving the common problems and promotes the development of fisheries and aquaculture in the entire region. To facilitate communication and recognizing the linguistic specificity of the region, NACEE has two official languages: English and Russian. It undertakes the mission of bridging the communication gap and acting as a mediator between the aquaculture-related institutions of the Eastern European countries and international organizations like EAS, FAO, FEAP and NACA.

For further information on NACEE, please contact Mr Peter Lengyel at HAKI (lengyelp@haki.hu). The authors will also appreciate receiving any additional information on Eastern European producer associations.

¹ FEAP Federation of European Aquaculture Producers. www.feap.info and www.aquamedia.org