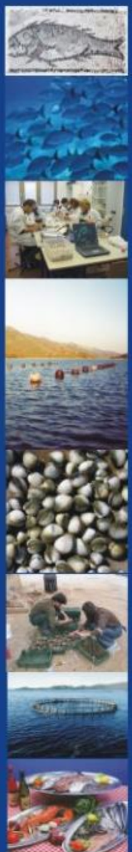
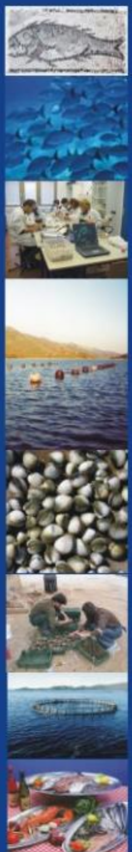
SVEUČILIŠTE U DUBROVNIKU
ODJEL ZA AKVAKULTURU



Hrvatska marikultura u EU- konkurencija i perspektive

Branko Glamuzina
Sveučilište u Dubrovniku, Branitelja Dubrovnika 29, Dubrovnik

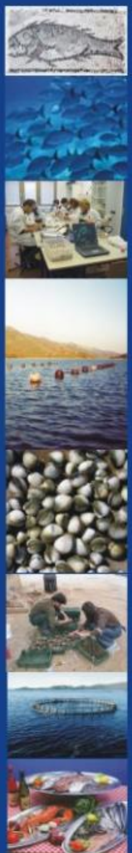
- ROMANTIČNI OSVRT NA HRVATSKU MARIKULTURU
- Hrvatska baštini dugu tradiciju u marikulturi, od višestoljetnoga uzgoja malostonskih kamenica, prvoga industrijskoga mrjestilišta morske ribe do uzgoja tuna.
- Razvoj komercijalnoga uzgoja, bio je uspješno praćen i u istraživačkom i visokobrazovnom sektoru.
- Danas gledajući i pored niza objektivnih i subjektivnih razloga, teško je objasniti zašto Hrvatska u zadnjih 30-godina nije postala veliki igrač u europskoj marikulturi, u odnosu na slične zemlje u okruženju, posebice Grčka i Turska.
- U zadnjih 20-tak godina, osim iskoraka u uzgoju tune, hrvatska marikulturna proizvodnja ne bilježi značajnije povećanej u proizvodnji i investicijama. Proizvodnja školjkaša od 2100 tona 2009. godine je manja nego prije rata, a uzgoj morske ribe je samo5000 tona u 2009.



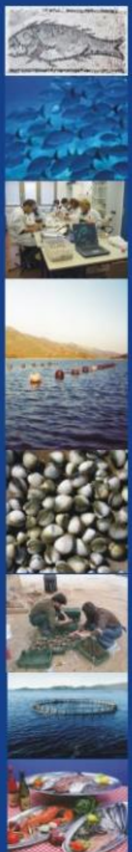
UZGOJ RIBE I ŠKOLJKAŠA U RH- TREND

	2007.	2008	2009.
ŠARAN	1503	1546	2.058
PASTRVA	2031	2058	2.024
LUBIN-ORADA	3950	4500	5.000
TUNA	4180	3711	4.200
DAGNJE I KAMENICA	3500	3000	2.100

Podatci: HGK, 2011



Uvoz ribe i prerađevIna	2008.	2009.
Žive ribe	817	97
ribe svježe ili rashlađene	1.075	929
riba smrznuta	31.845	25.506
riblji fileti	3.309	2.500
riba sušena, soljena, dimljena	1.054	860
Ljuskavci, mekušci	9.726	8.941
konzervirana riba	5.533	4.754
Izvor: dzs; obrada: hgk sektor za poljoprivredu, prehrambenu industriju i šumarstvo		

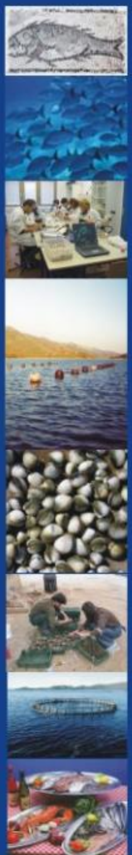


- A 2013. HRVATSKA ULAZI U EU
- ŠTO ČEKA MARIKULTURU ULASKOM U EU

- 1. OGROMNO TRŽIŠTE S DEFICITOM MORSKIH PROIZVODA I VELIM UVOZOM
- 2. OGROMNO TRŽIŠTE S VELIKOM KONKURENCIJOM
- 3. IZRAZITO SEGMENTIRANO TRŽIŠTE (npr. SJEVER-JUG
- 4. ZASIĆENO TRŽIŠTE NIZOM VRSTA S TRENDOM PADA CIJENA- DAGNJE, LUBIN, ORADA

SVEUČILIŠTE U DUBROVNIKU
ODJEL ZA AKVAKULTURU

PROIZVODNJA (tone)	Godina									
Vrsta	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
Šaran	**75,429**	**79,300**	**77,664**	**72,743**	**73,265**	**73,004**	**73,308**	**72,666**	**70,341**	**70,597**
Som	3,359	4,490	4,071	3,756	5,458	5,512	6,436	6,857	7,788	7,775
Jegulja	11,109	11,094	10,282	8,993	8,679	8,268	8,805	7,790	5,320	5,124
Plosnatice	3,969	5,007	5,029	5,730	6,004	7,035	7,464	9,020	8,903	10,086
Druga slatkovodna riba	619	595	420	496	528	481	539	350	514	471
Druga morska riba	4,989	6,109	10,103	9,071	9,655	15,203	16,781	18,725	17,400	19,486
Losos	591,068	611,013	640,825	671,695	756,770	716,994	748,978	763,348	926,428	987,789
Lubin	**46,157**	**57,811**	**56,162**	**61,093**	**62,060**	**68,679**	**79,706**	**97,336**	**93,425**	**138,156**
Orada	**60,831**	**75,232**	**79,003**	**79,767**	**88,340**	**88,922**	**93,772**	**119,499**	**105,097**	**148,830**
Jesetra	543	665	595	600	630	675	2,142	2,597	2,077	2,077
Tilapija	200	150	150	150	450	450	700	750	1,150	1,150
Dužičasta pastrva	**333,509**	**343,243**	**358,005**	**374,350**	**349,144**	**341,061**	**326,891**	**334,442**	**345,816**	**326,843**
Grand Total	**1,131,782**	**1,194,708**	**1,242,309**	**1,288,444**	**1,360,983**	**1,326,283**	**1,365,522**	**1,433,379**	**1,584,258**	**1,718,383**



Species	2006 Value (€ mill)	Volume (1000 tonnes)	Average price (€/Kg)
Atlantic salmon	574.1	144.6	3,97
Rainbow trout	494.9	201.0	2,46
Gilthead sea bream	314.0	73.0	4,30
European sea bass	282.8	56.0	5,05
Pacific cupped oyster	278.0	125.4	2,22
Japanese carpet shell	218.9	58.7	3,73
Blue mussel	207.3	146.9	1,41
Common carp	134.9	66.1	2,04
Mediterranean mussel	80.0	105.6	0,76
European eel	74.6	8.3	8,99
Sea mussels nei	62.9	229.2	0,27
Turbot	45.8	7.6	6,03
Grooved carpet shell	40.8	8.2	4,98
Atlantic bluefin tuna	36.7	3.2	11,47
European flat oyster	13.7	4.7	2,91
North African catfish	10.2	6.6	1,55
Other species	201.9	57.4	3,52
Total	**3,071.4**	**1,302.6**	**2,36**

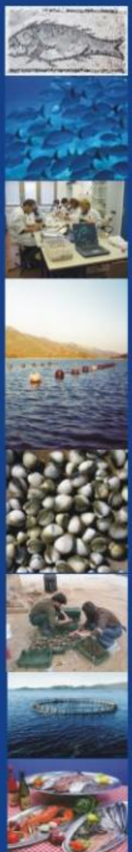


Table 13: Sea bream production (t) within EU-27 and Non-EU Mediterranean states 2003-2008

Year	2003	2004	2005	2006	2007	2008
EU-27 MED REGION						
Greece	49	46	44	60	43	60
Italy	12.4	13	15.6	20.2	23	25
France	7.8	8.5	8.5	8.9	9	10
Spain	3.8	3.8	5.7	3	4.1	4.1
Portugal	0.7	0.8	1.1	1	1.2	1.5
Others	2	2.2	2.6	2.8	3.1	3
Sub-total	**75.7**	**74.3**	**77.5**	**95.9**	**83.4**	**103.6**
Non-EU						
Turkey	12	13.9	17.5	22.5	24	27
Egypt	2.5	2.9	3.4	2.8	2.9	2.9
Croatia	2.5	2.5	2.5	1.6	1.6	2
Tunisia	1.1	1.6	1.9	2.2	1.5	1.7
Sub-total	**18.1**	**20.9**	**25.3**	**29.1**	**30**	**33.6**
Grand-total	**93.8**	**95.2**	**102.8**	**125**	**113.4**	**137.2**

Source FEAP Aquamedia

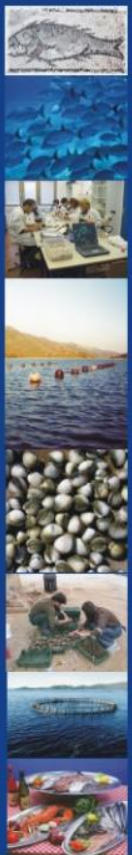


Table 14: Sea bass production (t) within EU-27 and Non-EU Mediterranean states 2003-2008

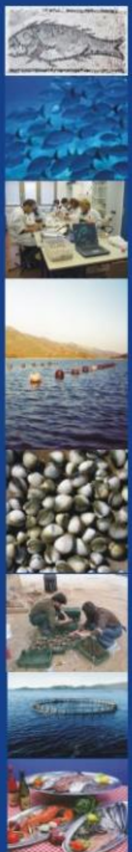
Year	2003	2004	2005	2006	2007	2008
EU-27 MED Region						
Greece	25.4	30	36	40	29	35
Italy	8.9	9	8.6	9.1	9.2	9.8
France	3.7	4	4.3	5.6	4.6	4
Spain	4.5	4.7	5.5	8.9	10.6	11.8
Portugal	1.5	1.5	1.5	1.4	1.4	1.4
Others	5.5	0.7	0.7	0.6	0.6	0.5
Sub-total	**49.5**	**49.9**	**56.6**	**65.6**	**55.4**	**62.5**
Non-EU						
Turkey	15	17	21.1	30	35	38
Egypt	3.2	2.8	5.3	2.1	2.6	2.6
Croatia	1.8	1.6	1.9	1.6	1.8	2
Tunisia	0.5	0.5	0.6	0.5	0.8	0.8
Sub-total	**20.5**	**21.9**	**28.9**	**34.2**	**40.2**	**43.4**
Grand-total	**70**	**71.8**	**85.5**	**99.8**	**95.6**	**105.9**

Table 25: Generalised SWOT analysis for European sea bass and sea bream aquaculture

Strengths	Weaknesses
Short production cycle (8) (9)	Licensing bureaucracy (1)
High demand in Mediterranean market (6)	Credit limits (10)
Market share 63-68% of global production (6)	Large number of small-subsidised operations in Greece with limited market access (6) (10)
Several large companies exploiting significant scale-economies (9)	Absence of production controls or strategic planning by Greek authorities (1)
Vertical integration (9) (10)	Low consumer familiarity (esp. bream) in Northern Europe (6)
Consistent quality and year round production (4) (6)	Absence of zoning (1) (3)
Protective sanitary legislation (5)	Lack of industry and market studies relating to potential export markets (6)
	Absence of timely updated EU industry and market information (10)
	Limited authorised chemicals and chemotherapeutants for prevention and treatment of disease
	Lack of effective vaccines to prevent some disease losses

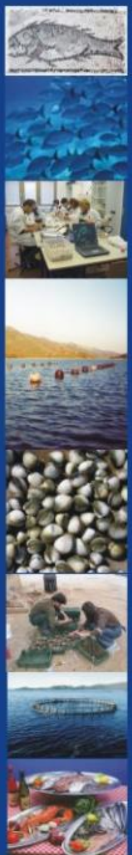
Opportunities	Threats
Increasing demand for farmed produce (4) (6)	Increased-production and price competition (6) (9) (10)
Emerging markets for processed products in N. Europe (6)	Third party competition (Turkey) (6)
Emerging quality labels (4) (6)	NGO campaigns against poor farming practices (4) (6) (10)
	Inability to launch centrally coordinated transnational promotion campaigns (6)
	Emerging diseases (5)

Table 27: Generalised SWOT analysis for European shellfish aquaculture



Strengths	Weaknesses
Low input production systems (labour and feeds) (2) (8) (9)	Over production resulting in low prices e.g. mussels (6) (9) (10)
Increasing demand (4) (6)	Fragmented production base e.g. oysters (6) (9) (10)
Protective sanitary legislation (5)	Negative environmental impact of dredging operations (2) (8)
	No possibility of treatment applications (5)
	No vaccines available (5)
Opportunities	**Threats**
Development of new environmental friendly production systems (2) (8)	Diseases and parasites (5)
Eco-labelling opportunities (2) (4) (6)	Environmental contamination (5)
	Uncertain spat-fall under extensive production conditions (2) (8) (9)
	Spread of commercially unfavourable/ invasive species (2) (10)

SVEUČILIŠTE U DUBROVNIKU
ODJEL ZA AKVAKULTURU



- **PERSPEKTIVE**
- **KROZ STRUKTURNE PREDPRISTUPNE FONDOVE NE PREDVIĐA SE POTPORA ULAGANJIMA U MARIKULTURNU PROIZVODNJU ???**
- **U EU POTPORE SU DOSTUPNE UGLAVNOM KROZ *Europski ribarstveni fond* EFF, a za inovacije kroz FP7 program *(fond je trenutno u fazi restrukturiranja radi postizanja planiranih ciljeva i problema s kojima se suočavao; poticaji nisu rezultirali rastom proizvodnje)— visoka kompetitivnost u natječajima ???***
- **INVESTICIJE BI TREBALA PROMOVIRATI RH, RADI POLITIKE RURALNOGA RAZVOJA OTOKA I PRIOBALJA I SPRJEČAVANJA NEGATIVNIH DEMOGRAAFSKIH TRENDOVA ????**
- **ORIJENTACIJA NA LOKALNO I TURISTIČKO TRŽIŠTE**
- **OKRUPNJAVANJE SEKTORA, POSEBICE U ŠKOLJKARSTVU**
- **PRILAGODBA SVIH DIONIKA SEKTORA NA PREDSTOJEĆE PROMJENE—PROIZVODNJA, JAVNI SEKTOR, ZNANOST I OBRAZOVANJE**