

Fisheries Sector and the Marketing Structure in Turkey

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Abstract

This study aims to reveal the current situation of the fisheries sector in Turkey together with its marketing structure and problems. One of the most important problems of the fisheries sector in Turkey is the marketing structure. The most intense used marketing channel is the fisher-commission agent-retailer-consumer marketing channel. The income of the fish breeder is low due to the small role of cooperatives in marketing.

Keywords: Turkey; Fisheries; Marketing; Problems

Introduction

Turkey has a strong potential for aquaculture. The fisheries sector is an important source of income and employment. The effective and sustainable use of these resources is highly important. The total seafood production in Turkey is 630 820 tonnes [1]. With its current production, while Turkey 6th in Europe; it is in around 30s in the world [2]. Being 5.5 kg per capita in

Turkey, the average consumption is far below the world average of 19.2 kg [1].

Current Status of Fisheries Sector

Table 1 shows the amount of seafood production through hunting and cultivation, and the amount of import and export in between 2008-2017.

Years	Hunting (Tonnes)	Cultivation (Tonnes)	Total Production	Import	Export
2008	494.124	152.186	646.310	63222	54526
2009	464.462	158.729	623.191	72686	54354
2010	485.939	167.141	653.080	80726	55109
2011	514.755	188.790	703.545	65698	66738
2012	432.442	212.410	644.852	65384	74006
2013	374.121	233.394	607.515	67530	101063
2014	302.212	235.133	537.345	77551	115381
2015	431.907	240.334	672.241	110761	121053
2016	335.320	253.395	588.715	82074	145469
2017	354.318	276.502	630.820	100444	156681

Table 1: Turkey Seafood Production, Import and Export (tonnes).

The amount of production provided by hunting has decreased in recent years. In the period from 2008 to 2017 in Turkey, a 29% reduction in hunting has taken place; it has been an 81% growth in the cultivation field. As for total production, it has decreased by 2.5%. The decrease in the production through hunting has been struggled to be met by production through cultivation. On the one hand, this depends on the decrease in our fish stocks but on the other hand, it depends on the support given to the cultivation [2]. Imports and exports increased during the same period. In 2017 in contrast to the export amounted to 854.731.829 TL, import has taken place amounted to 841.383.610 TL [1]. Turkey is a country which both imports and exports in terms of seafood. Income received from exports was higher than import expenditures. Fish consumption per capita decreased from 7.8 kg down to 5.5 kg in the period of 2008-2017 [1].

Fishing Marketing Channels

Considering the seafood distribution system in Turkey, it is noticed that marketing activities are carried out through four channels: (1) directly shipping to fish marketplace, (2) directly shipping from the boat to the commission agent, (3) shipping to the processing facility and (4) shipping to the cold storage depot in the name of the boat. There are 13 aquaculture warehouses in our country. Approximately 200-300 thousand tonnes of aquaculture are sold in warehouses annually. In the aquaculture distribution system, fisheries warehouses are very important centers in terms of both providing the necessary data for fisheries management and controlling the criteria as the origin of sold products, hunting area and size bans, freshness, hygiene and food safety [3].

Marketing channels differ by products. In aquaculture, a multi-staged structure draws attention in the form of fishermen (producer)-fisheries warehouse commission agent (wholesaler or semi-wholesaler)-retailer-consumer. In the provinces where there is a fisheries marketplace, the caught fish are gathered in marketplaces, they are sold to retailers through commission agents after the vendue (auction) organized here. While some of the commission agents work as wholesalers, some continue as a semi-wholesaler or retailer in the meantime [4].

One of the most important problems in fish marketing is the lack of organization of fishers. For this reason, the bargaining power of fishers is weak and their effects on price formation are too low. Fishers are obliged to accept prices determined by commission agents. The fact that there are too many producers in this situation induces to a decrease in competition in marketing. The fact that fish

meal-oil factories and commission agents, which are active in marketing, determine price negotiating among themselves both prevents competition and causes a reduction in fishers' income [5]. Direct sales through cooperatives will be beneficial to producer and consumer. Cooperatives will increase marketing effectiveness and shorten the marketing chain.

Considering business administration, cooperatives are ambidextrously highly important in terms of organization of producer and marketing, product evaluation and marketing along with production phase. Therefore, aquaculture cooperatives should play an important role in the evaluation and processing of products, provision of cheap and high-quality feed, provision of seed fish and solution of problems in marketing [6]. An effective and producer-oriented marketing system will benefit the fisher as well as the sector. A stable environment can be achieved for producers by means of resource management, price formation, and supply-demand balance via cooperatives [7]. Other problems in marketing are stated as the high rates in commission agent cuts and value-added tax, insufficient government support, difficulty in obtaining finance, costly hunting equipment [8].

For an increase in the efficiency of production and marketing, organizations in the form of cooperative should be supported and their effectiveness in marketing should be increased. As long as problems solved, profitability in fisheries industry and the contribution of the fisheries sector to Turkey's economy will increase.

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