

Fisheries Economy

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The Fish Processing Industry and the Fish Trade

- These, the secondary and tertiary divisions of the commercial fisheries, are not always separable. Where distances from points of landings to centres of consumption are short and, as often in tradition-oriented communities, consumers prefer to obtain undressed or minimally dressed fish, the processing phase may be by-passed more or less completely.

- To the extent that processing does take place, it is performed by fishermen themselves or by vendors at dockside or at central marketplaces. Generally speaking, an advanced degree of processing and packaging, including the operations of filleting, freezing, curing, canning and the preparation of by-products, is required (a) when fish must be stored for long periods, (b) when market outlets are situated far inland, and (c) when products are exported to other countries.

- The necessity for prolonged storage reflects a disparity between market requirements and supply availability. This may be (a) inevitable, i.e. attributable to the catch being based on stock concentrations of short duration or to consumption being concentrated annually by social or religious custom, or (b) wholly or partly avoidable, i.e. attributable to disorganization and/or the use of inadequate technology in resource harvesting.

- Distance between landing ports and distribution centres in the hinterland is largely a function of the size of a country and the service of export markets becomes an objective when supply, in the production of which a country possesses a comparative advantage, substantially exceeds the absorptive capability of the domestic market.

- Where the three divisions of harvesting, processing and marketing (trading) are well developed and clearly identifiable, there may still be a marked separation of the first from the latter two. The port market, despite its effectiveness frequently being blurred by (a) financial ties between fish buyers or middlemen and fishing enterprises, e.g. the powerful “fish mammy” institution in certain regions, and (b) types of vertical integration as already indicated, usually separates the primary from the other two divisions of the fisheries quite distinctly.

- There may be no such clear-cut distinction between the latter divisions. Instances of integration forward, from processing through wholesaling to retailing (in export as well as domestic markets) may occur and the larger firms in both divisions may be closely associated through interlocking arrangements of various kinds.