



FRIEND OF THE SEA

Sustainable Seafood

An overview of Albanian seafood industry

1. Structure and characteristics of the industry

1.1 Marine fisheries

Marine capture fishery is the most important sector of the fisheries industry but lagoon and inland fisheries are also significant. Capture production in 2014 was 5 730 tonnes, with marine fisheries constituting 68 % of the total and the rest coming from inland fisheries.

Fishing activity takes place along the entire 476 km of Albania's coastline, including its territorial waters (12 miles from its baselines). However, fishing activity is mainly concentrated on the continental shelf, which on the Adriatic side in the north extends to 25 miles, but to only 2–4 miles on the side of the Ionian Sea. From the management point of view, Albanian fishing waters are located in the FAO GFCM geographical subarea 18 (GSA 18).

The Albanian marine fishing fleet includes 584 vessels (2014) and is concentrated in four ports: Durrësi, Vlora, Shëngjini and Saranda, with Durrësi being the largest one (about 100 vessels). Albanian marine fisheries include both industrial and artisanal fleets. Industrial fleets mostly employ trawlers and purse seiners, while artisanal fisheries feature fixed and selective gear such as hooks, fixed nets, trammel nets, and gill nets.

About 40% of the vessels in the fleet are small multi-gear vessels less than 6 metres long. Vessels above 12 metres represent some 43% of the fleet. The main gear used is trawl (about 38 % of the total number). Capture fisheries in 2014 amounted to 5,813 tonnes 35-40% of which are demersal species, such as hake, red mullet and deep-water shrimp, which have been mainly exported (largely to EU countries) as fresh fish. Sardine and anchovy are also exported.

1.2 Inland fisheries

Albania is a rich country in freshwater resources, with the largest lakes in the Balkan Peninsula, artificial lakes, rivers with a snowmelt-pluvial regime with torrential characteristics, ensuring a plentiful source of freshwater, and an abundance of reservoirs for agricultural use.

About 800 fishers using gillnets, beach nets, and hooks are active in these inland waters (including lagoons). The capture production by inland waters for Albania was 1 482 tonnes in 2015.



FRIEND OF THE SEA

Sustainable Seafood

Fishing takes place mainly in five lakes, four of which are large cross border lakes, Shkodra, Ohrid, and the major and minor Prespa lakes. One of the most valuable species caught in the Shkodra Lake is carp.

1.3 Aquaculture

Aquaculture is currently a significant activity for Albanian seafood production and has a great potential for development in the future. In 2014 aquaculture produced 2 424 tonnes, consisting of freshwater fish, marine fish and mollusc.

Traditionally, freshwater aquaculture was based on the culture of common cyprinid species, such as common carp and Chinese carps. Cold water salmonids, mainly rainbow trout (*Oncorhynchus mykiss*) and ohrid trout (*Salmo letnica*), are another important group within intensive/semi intensive aquaculture production in Albania.

The restocking of *Salmo letnica* and indigenous carp fingerlings in natural lakes, such as Ohrid and Prespa, and agricultural reservoirs is also a common aquaculture practice in Albania. It is stocked through the Lini hatchery, where artificial reproduction of *Salmo letnica* has been carried out since 1965, and which currently stocks nearly million of larvae and fingerlings every year. The seed materials (larvae and fingerlings) are produced under controlled systems, starting from the eggs collected from the maturation natural brood stock from the lake by specialized fishermen. The Ministry of Agriculture, Rural Development and Water Administration is responsible for the management and financial support of this hatchery.

The aquaculture sector has then transformed itself over the years, towards new aquaculture species in marine waters, while the traditional cyprinid farming has gradually lost importance. Today, the main farmed species produced in Albania are rainbow trout (*Oncorhynchus mykiss*), European seabass (*Dicentrarchus labrax*), gilthead seabream (*Sparus aurata*), common carp (*Cyprinus carpio*), bighead carp (*Hypophthalmichthys nobilis*), grass carp (*Ctenopharyngodon idellus*), silver carp (*Hypophthalmichthys molitrix*), European mussel (*Mytilus galloprovincialis*), ohrid trout (*Salmo letnica*). Their main destination is for domestic consumption, except for seabass and seabream that are also exported.

Marine cage culture activities are concentrated in the Ionian Sea where 26 operators farm gilthead seabream (*Sparus aurata*) and European seabass (*Dicentrarchus labrax*). Hatcheries for these species are not present in the country and the fingerlings are imported mainly from Italy and Greece.



FRIEND OF THE SEA

Sustainable Seafood

Mediterranean mussel cultivation (*Mytilus galloprovincialis*) is concentrated in Butrinti lagoon in Saranda, with some activity also in the open sea at Shengjini Bay (around 100 ha with floating lines) with a yearly production of 1 400 tonnes.

2. The utilisation of the catch

2.1 Processing and trade

There are six fish processing companies in Albania. Four of them produce anchovy, sardine, and other small pelagic species for export, while two are specialised in frozen fish products. The development of the aquaculture sector in the last years has followed consumer demand from the domestic fish market, especially for marine finfish products. To cover the domestic demand, Albania imports marine aquaculture products, mainly seabass and seabream, from Greece. The total imports of fisheries and aquaculture products amounted to 2 929 tonnes in 2014, a 50% decrease from 2010. Most imports originate from Italy and Spain; 20 % and 29 %, respectively.

Export value of fisheries and aquaculture products in 2014 accounted for €42 million. The main destinations for Albanian exports are Italy (80 % of the total volume) followed by Greece (14 %), and Macedonia (2.5 %), with prepared and preserved anchovies representing the bulk of exports. Albania does not export aquaculture products, with an exception of some processed (marinated) molluscs and seabass and seabream.

2.2 Seafood consumption

Albanian consumers have traditionally preferred meat and poultry products, whereas fish is consumed to a limited extent mostly in the coastal regions of the country. Despite this, the consumption of seafood has increased gradually and the consumption per capita was estimated to be about 5.5 kg/year in 2012.

3. State of Albanian fishing resources

3.1 Fisheries Management

The Directorate of Fisheries Policies of the Ministry of Environment, Forestry and Water Administration, is responsible for managing the fisheries sector. The Fishery Research Institute in Durrësi is responsible for fisheries research. The main scientific activities of the Institute are fish stock assessment, study of Albania's lagoons and their potential and the restocking of inland water bodies with fingerlings.

The legislative framework for the fisheries and aquaculture sector includes several laws and by-laws. The main law regulating this sector is Law no 64/12 of 2012 "On Fishery". Albania is in the process of



FRIEND OF THE SEA

Sustainable Seafood

becoming a European Union (EU) Candidate Country and, in this regard, is also in the process of aligning its legislation with the EU's *acquis communautaire*. Several by-laws have been approved that transpose some of the principles of the Common Fishery Policy into Albanian legislation. The legislation also contains the main principles of the Code of Conduct for Responsible Fisheries and has initiated the formation of the Fishery Management Organisation for marine and inland waters.

The EU is supporting the Albanian fishery sector with a EUR 2 million project “Establishing and Strengthening a Monitoring, Control and Surveillance (MCS) System for Fisheries in Albania”, which aims at increasing the capacity of the fishery inspectors and the installation of Vessel Monitoring System (VMS) devices on all vessels longer than 12 m.

The Fishery and Aquaculture Policies Sector, within the Directory of Agriculture Production & Trade Policies is the responsible for directing and coordinating the monitoring and controlling system for scientific research projects that relate to sea fishery resources.

In March 2003, Albania adhered to the Convention on International Trade in Endangered Species of Wild Flora and Fauna (CITES).

Albania acceded to the 1982 UN Convention on the Law of the Sea (UNCLOS) in June 2003. It is also a Party to the 1976 UNEP Convention for the Protection of the Marine Environment and the Coastal Region of the Mediterranean (Barcelona Convention).

Albania is member of the European Inland Fisheries and Aquaculture Advisory Commission (EIFAAC), the General Fisheries Commission for the Mediterranean (GFCM), and the International Commission for the Conservation of Atlantic Tunas (ICCAT).

3.2 Stock status

The main species targeted by the Albanian fleet are European anchovy (*Engraulis encrasicolus*), European hake (*Merluccius merluccius*), red mullet (*Mullus barbatus*), deep-water rose shrimp (*Parapenaeus longirostris*), and European sardine (*Sardina pilchardus*).

The status of the stocks is assessed and monitored by FAO through the GFCM and the AdriaMed Project. As for the whole Mediterranean Sea, there are increasing concerns related to the over-exploitation of fish stocks. The majority of fish stocks in the Mediterranean Sea, including the abovementioned, are in fact subjected to overfishing and overexploitation. A reduction of fishing mortality is necessary to ensure the sustainability of the fisheries in the region.



FRIEND OF THE SEA

Sustainable Seafood

4. Friend of the Sea certification: opportunities and benefits for Albanian markets

The Albanian aquaculture sector has the potential for future development. Friend of the Sea certification for sustainable fish farming operations can assist the development of Albanian aquaculture industry towards a sustainable basis. In fact, Friend of the Sea approves only sustainable aquaculture methods that do not impact the ecosystem, representing a significant incentive for the industry to operate in the respect of the marine environment. The certification can improve not only environmental aspects, but also production and profitability, improving the overall performance of the industry.

Moreover, FOS certification can provide ecological promotion to the traditional fishing and aquaculture activities and products, such as the autochthonous trout *Salmo letnica* and carp.

On the other hand, it is possible to foresee some challenges for the Albanian fisheries to access sustainability certification, as the main stocks are overexploited and overfished, or in overfishing. A reduction in fishing mortality is therefore necessary before Albanian fleet can be successfully certified as sustainable.