



Enhancing Market Access of Amazonian Aquaculture and Fisheries Products

(CFC/FSCFT/28)

**2nd Progress Report
April 2010 - February 2011**

15th March 2011

1 - Introduction

The project was officially launched in Manaus, Brazil, the 1st September 2009 at the 11th session of COPESCAL (Commission for Inland Fisheries of Latin America). The launching in Manaus was followed by a formal launching in Leticia, Colombia, the 5th September and in Iquitos, as well as in Lima, Peru, the 11th and the 13th November 2009.

The first activities of the project were reported in the 1st Progress Report, from 22nd March 2010. The present 2nd Progress Report explains how the activities evolved since then. All field travels and training activities during this period were also subject of specific reports timely sent to the CFC and to FAO.

2 – Results attained so far

According to the 1st year Workplan, 6 objectives from 3 of the 4 project components were foreseen to be attained during the first 12 months of activities.

Objectives to be developed according to the 1st year workplan

Objective	quarter	main activities to be implemented	responsibilities	output
objective 1	1,2,3	Implement the 7 foreseen market surveys and publish their reports	Project coordinator Marketing expert	7 survey reports published
objective 2	4	Analysis of market opportunities and planning marketing programmes	Project coordinator, Marketing expert participating wholesalers	3 marketing programmes prepared; 3 marketing workshops realized
objective 3	4	Supervision and support of producers marketing activities	Marketing expert governments extensionists	
objective 5	1,2,3	Purchase and installation of 3 workshops and ice plants	Project coordinator Quality expert Handling expert	3 installed demonstration workshops with ice plants
objective 6	3,4	Training of fishermen and fishfarmers in fish handling and quality control	Quality expert Handling expert Government extensionists	
objective 7	3,4	Supervision and support of production and air shipping activities	Quality expert Handling expert Marketing expert Governments extensionists	

Component 1: regional market surveys

Component 1 of the project can be considered almost completely achieved. Actually, the printing of the last report (Brasília – or activity 1.5.2 of the Final Appraisal Report) is under way.

In order to achieve all activities of this component, the PEA identified and hired local experts in the cities to be surveyed, training them in the methodology to be applied in their work. The PEA also supervised the surveys and indicated corrections and improvements to be brought to the successive drafts presented by their authors. In the case of Bogotá, the PEA also participated to some of the field inquiries. In the case of Iquitos, the whole work was performed by the PEA as its foreseen counterpart/cofinancing activity.

For the implementation of this component a total of 24 persons was mobilized (22 field researchers and 2 editors) and hired by the project, further to the PEA experts.

The PEA was specially concerned by the harmonization of the 7 surveys in terms of methodology and in terms of presentation. All the editing of the 7 documents was performed by hired editors in Montevideo. The printing was realized by local printing offices, in Manaus, Rio de Janeiro, Lima, Bogotá and Brasília, under the supervision of the PEA, in order to guarantee the same quality and aspect of the documents.

Market survey in Manaus (84 pages) :

- Prepared by André Lima Gandra, hired by the project.
- 1000 copies printed in Manaus

Market survey in Iquitos (38 pages):

- Prepared by Javier Lopez - counterpart of INFOPECSA
- 500 copies printed in Lima.

Market survey in Rio de Janeiro (103 pages):

- Prepared by Dr. Renata Melon Barroso, hired by the project, with the volunteer assistance of Alexandre Cigagna Wiefels.
- 1000 copies printed in Rio de Janeiro.

Market survey in São Paulo (86 pages):

- Prepared by Instituto de Pesca de São Paulo, hired by the project, with a team (15 persons involved) under the coordination of Cristiane Rodrigues Pinheiro Neiva.
- 1000 copies printed in Rio de Janeiro.

Market survey in Lima (110 pages):

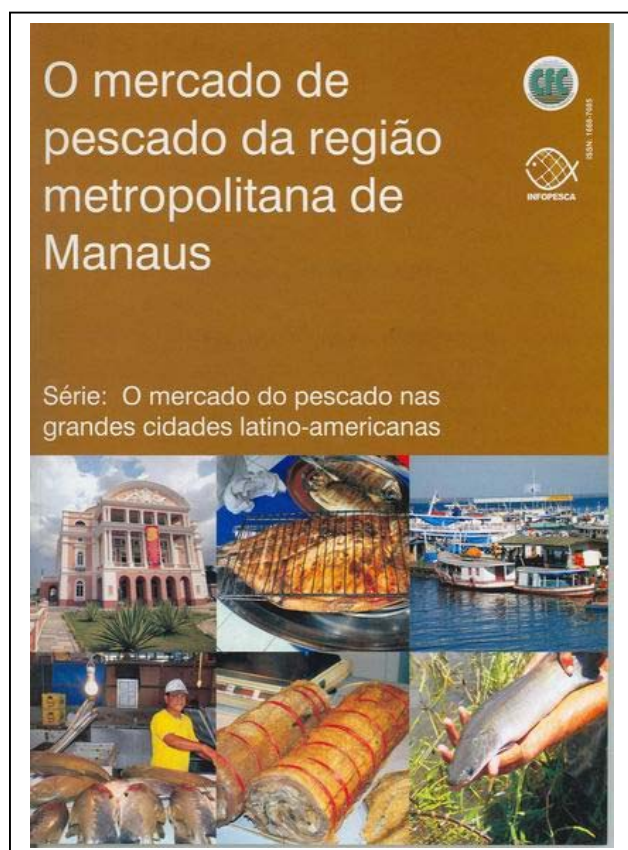
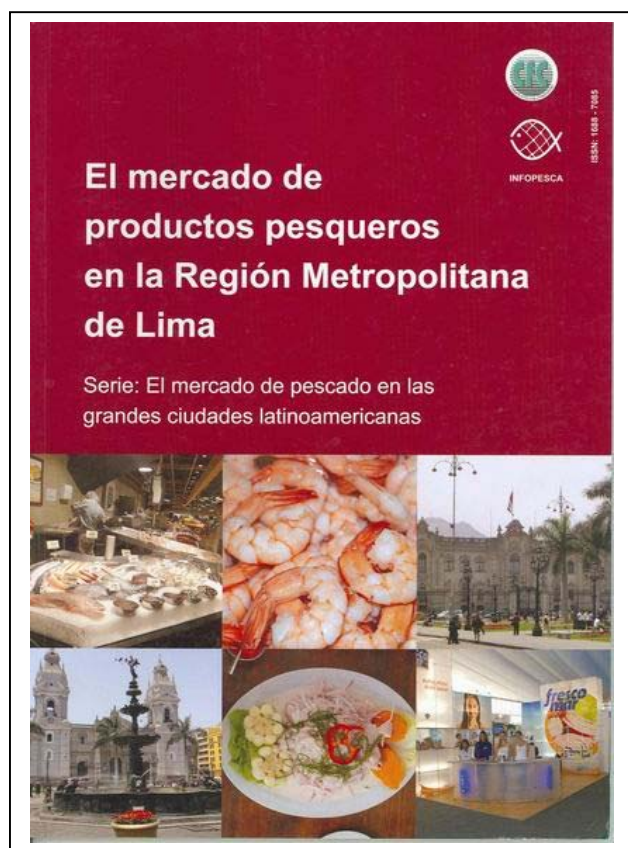
- Prepared by Dr Luis del Carpio Castro and by Benjamín Vila Alacón, hired by the project.
- 1000 copies printed in Lima.

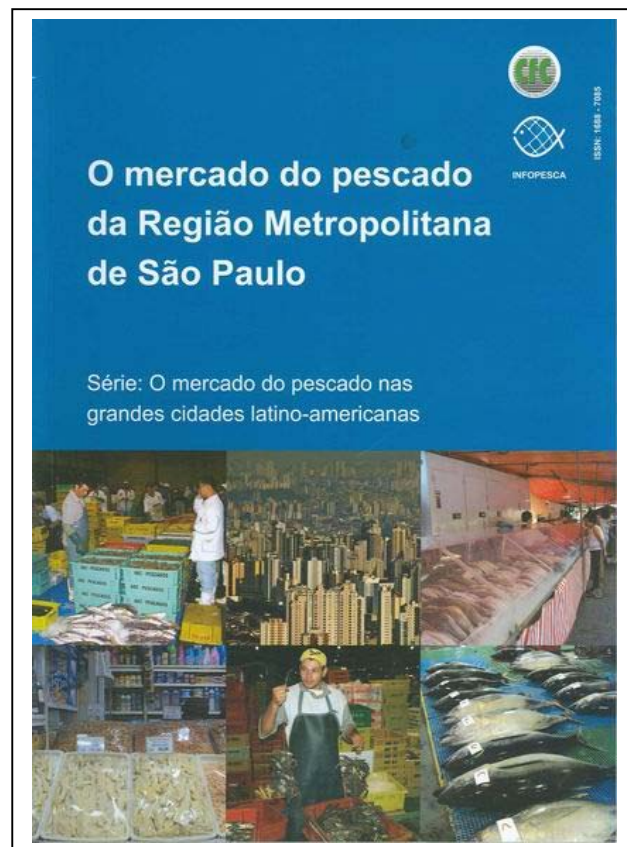
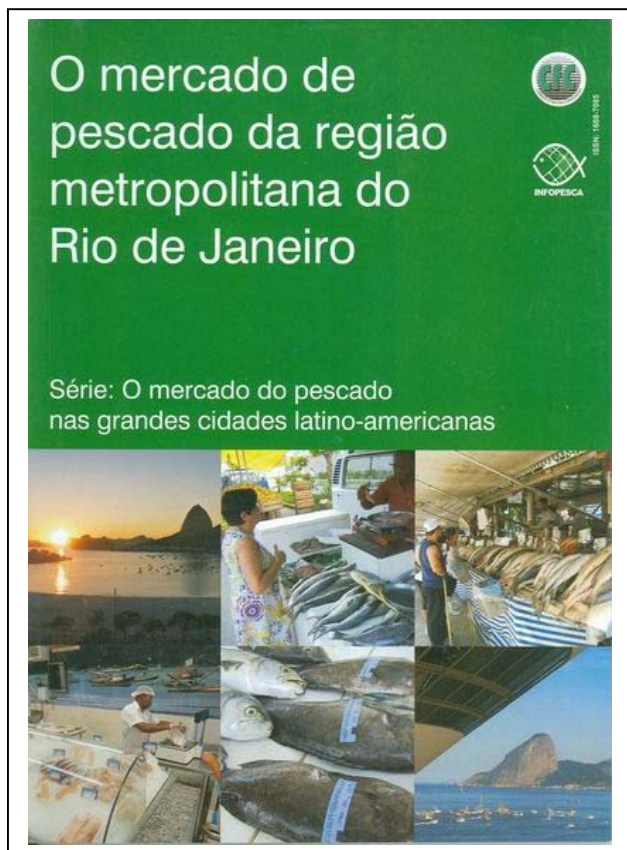
Market survey in Bogotá (96 pages):

- Prepared by Mrs. Esly Perucho, hired by the project.
- 1000 copies printed in Bogotá.

Market survey in Brasília (109 pages) :

- Prepared by Dr. Adalmyr Moraes Borges, hired by the project.
- 1000 copies under printing in Brasília.





The 7 market survey documents of the project are presented as CFC – Infopesca publication and were duly registered as a collection under the International Standard Serial Number 1688-7085.

Component 2: training of fishermen, fish farmers and wholesalers in the field of marketing of fish products

Analysis of market opportunities and planning marketing programmes

Three workshops were organized and implemented in all three project sites:

- Leticia: 11th and 12th October 2010
- Manaus: 14th and 15th October 2010
- Iquitos: 17th and 18th November 2010

These activities represent outputs 2.1, 2.2 and 2.3 of the Final Appraisal report. They benefited directly 130 persons. A special report about these activities was timely sent to the CFC and to FAO.

These workshops were intended to help the benefited producers to design their own marketing programmes. At for the three benefited producer associations it was something totally new and it opened their minds for new marketing possibilities

Supervision and support of producers marketing activities

Further to the workshops, informal talks about marketing concepts and their implementation according to local realities are constantly held with the producer associations representatives during field visits. Many concepts have to be repeated several times and presented in different ways in order to be really understood.

For the time being, the practical implementation activities designed in the marketing programmes are still not completely operational as they depend greatly on the ice plants and the processing units to be fully operational (see component 3)

Component 3: training of fishermen, fish farmers and wholesalers in correct handling and processing of fishes

Purchase and installation of 3 workshops and ice plants

At all three project sites the purchase and installation of the workshops and ice plants has taken longer than originally foreseen, due to different local reasons. The PEA has invested more time and efforts than foreseen but these efforts, in conjunction to those of the national counterparts, are giving results.

In Leticia: the ice plant and the processing unit were installed and inaugurated with the presence of local authorities (including the governor of the Colombian department of Amazonas – see specific travel report on the subject). However the direction of the fishermen association failed to pay an old debt to the electricity company and the transformer installed in front of the fishermen association headquarters was removed by the company. Long discussions were held between the fishermen association, the electricity company and INCODER (the Colombian national counterpart). The PEA asked for a prompt solution in order to proceed with the project activities, and works in close connection with the national counterpart. According to INCODER, the situation will be solved very soon. Meanwhile the ice plant and the processing unit are still not operational.

In Manaus: The ice plant was purchased and is already in Manaus under custody of the fish farmers federation, but still dismantled. The Fish farmer federation has internal discussions about where to assemble the plant and build the demonstrative processing

unit. In fact, the federation is relying on a promise from the government of the State of Amazonas to finance the construction of a larger processing unit (not just a demonstrative one) and, according to their wish, the ice plant would then be included in the complex. The PEA has however clearly expressed that the timing of the CFC project cannot be in the dependency of a possible other project to be funded by the State of Amazonas. The PEA works in this case in close coordination with SEPROR (Secretariat of Rural Production of the State of Amazonas) in order to let it clear to the fish farmer federation that waiting for a bigger project leads to the risk of having nothing, once the timing of the CFC project activities is limited. In March 2011 the Federation manifested that the message was understood and the installation of the ice plant and processing unit is now imminent.

In Iquitos: the main problem in Iquitos was the choice of the place to install the ice plant and the demonstrative processing unit. The place indicated by the local office of PRODUCE (Ministry of Production – the national project counterpart in Peru) as well as the first one indicated by the benefited fish farmer association were not technically feasible as they completely lacked the needed infrastructure (electricity and water) and were located “in the middle of nowhere”, in the jungle. It took two missions of the PEA and many telephone calls and e-mails to finally, with the accordance of all stakeholders, define the place where to install the ice plant and the processing unit, duly supplied with electricity and water. The ice plant was purchased in Lima and should soon arrive and be installed in Iquitos.

Training of fishermen and fish farmers in fish handling and quality control

At all three project sites some training activities were held regarding fish handling and quality control (see specific travel reports), but it is clear that the main training activities will be implemented once the ice plants and processing units will be fully operational.



The ice plant kit already in Manaus, waiting to be assembled at the agreed site



Inauguration of the ice plant at the Fishermen Association of Leticia



Headquarters of ASOPESCAM, in Leticia, where the ice plant and the processing unit are installed.



From left to right:

Elsy Perucho (INCODER)

Isabel Cristina Beltrán (INCODER)

Olbar Andrade Rincón (Governor of the Department of Amazonas)

Roland Wiefels (INFOPESCA)

Campo Elías Cabello (territorial director of INCODER)

Antonio do Carmo (President of ASOPESCAM)



*Discarded site offered by PRODUCE
for the ice plant in Iquitos*



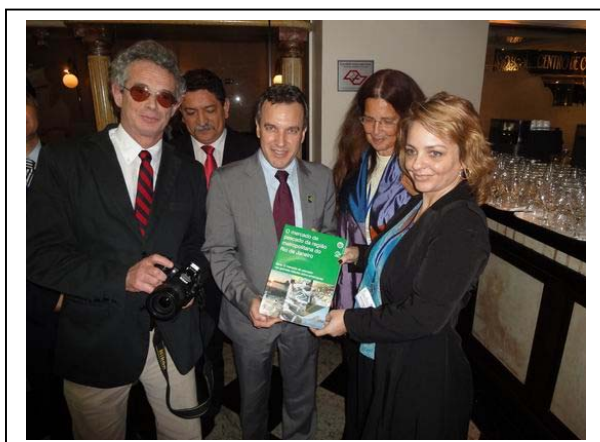
Final approved site for the ice plant

Component 4: wide dissemination of results

Even if activities under this component were not foreseen in the 1st working plan, many dissemination activities were realized.

Contacts were held with the Ecuadorian authorities in order to identify the Ecuadorian counterpart who will follow the project activities. Mr. Ramón Montano Cruz, was designated by the Ecuadorian Sub-Secretary of Fisheries Resources, Luis Arriaga Ochoa. It was agreed that he will participate in training activities once the three ice plants and processing units will be fully operational. This Ecuadorian counterpart will also help in the organization of the foreseen dissemination seminar in Quito at the end of the project..

From 20th to 24th September 2010 INFOPESCA, together with FAO, implemented the 16th meeting of the Pan American Network of Fish Inspection and Quality Control, attended by over 150 participants from 17 countries. The project results were widely disseminated at this opportunity, including the formal presentation of the market surveys of Rio de Janeiro, São Paulo and Bogotá by their authors.



*Brazilian Minister of Fisheries, Altemir Gregolin,
receiving the report of the Market Survey of Rio
de Janeiro from author Renata Melon Barroso,
with the presence of INFOPESCA and FAO
representatives.*

Furthermore, as the PEA publishes a quarterly specialized magazine widely distributed in Latin America and the Caribbean (and also in other parts of the world), a special effort was made to disseminate the project activities as well as articles related to the project activities in the Amazonian region, in particular:

- Issue 40 (October – December 2009) – news article (with pictures) about the launching of the project in Manaus.

- Issue 41 (January – March 2010) – article “Producción de semilla de paiche en Perú”, by Fred Chu-Koo and Salvador Tello. Page 30 to page 35.

- Issue nº 42 (April – June 2010) – article “Comienza el proyecto Amazonas – potenciando el pescado y los productos pesqueros amazónicos”, by Nelson Avdalov. Page 12 to page 14. In this issue of the magazine, the project was on the cover page. →



- Issue nº 43 (July – September 2010) – article “Especies cultivadas en la Amazonia Peruana con potencial para la exportación” by J.M. Peiró Crespo. Page 16 to page 19.

- Issue 44 (October – December 2010) – article “Colombia: producción y variedad piscícola”, by Maria Claudia Merino Archila. Page 18 to page 23

Conclusions

Project activities are under good implementation. The 1st component can be considered as achieved. 2nd component is on time according to working plan. 3^d component was delayed for some months as the effective operation of the ice plants and demonstrative processing units is still not reached due to the reasons explained hereabove. Nevertheless solutions are being found to the problems encountered.

Since the beginning of the project many changes have occurred regarding stakeholders:

- In Peru, a new direction of the fish farmers association in Iquitos was elected and had to be briefed about the details of the project proposal and activity. The same happened with the newly appointed director of the local office of PRODUCE.
- In Brazil, the national fisheries authorities at the Ministry of fisheries were all changed in January 2011 after the election of the new Government. Briefings with different authorities at the ministry level are under way.
- In Colombia, changes have occurred at national Government level and the original national counterpart ICA was substituted by INCODER. By the end of year 2010, also the direction of INCODER was changed.

None of these changes constitute a problem. It is just a matter of briefing the newcomers about the project purposes and activities in order to continue having the full support of the counterpart institutions.

Finally, during year 2010 (and it continues in 2011) the US Dollar has strongly devaluated in regard to local currencies in the 3 countries (particularly in Brazil). The already tight project budget has become tighter, even considering the CFC compensation system (SDR). This leads the PEA to real performances in costs control for the implementation of activities.