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Taking a Photo of Turkish Fishery Sector: A Swot Analysis

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Abstract

Turkey, with its advantageous geographical position, surrounded by the large water bodies and inland waters has a great potential to enlarge its share in the fishery market in the world. According to statistics, Turkey ranked as 29th country contributing to world fish supply, but the future projections of the fishery sector indicate that the sector will maintain its promising development in the future. For that reason, strategic thinking and management is needed to develop for Turkish fishery sector in the future. To explore the strengths and weaknesses, and threats and opportunities of the fishery sector we made a SWOT analysis by organizing a workshop with the fishery companies in Muğla province to see the practitioners' views to their business. On the other side, interviews were made with the academicians studying in this field. Through primary and secondary data we prepared a swot analysis with a systematic approach to scrutinize the sector. Based on the results, the main strengths and opportunities of the sector are rich product variety, closeness to fishing grounds and good infrastructure, positive image of Turkish products in the Middle East and Europe, increasing fishing demand in the world, potential to enter close markets, especially to neighbour countries, diversification opportunities for aquaculture; leisure and tourism, potential to develop a greater range of products. On the weaknesses and threats side marketing problems, low educational level of farmers and workers, financial difficulties, environmental pollution, decreasing fish populations, high energy costs are determined by the practitioners and the academicians.

Keywords: Turkish fishery sector, strategic management, SWOT Analysis

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1. Introduction

The fishery sector plays a key role in food security and economy for both producers and consumers who have the opportunity to have high-quality animal protein with affordable prices.

According to the State of Fisheries and Aquaculture 2010 report prepared by FAO, annual per capita fish consumption in the world has a rising trend over years, an average of 9.9 kg in the 1960s, 11.5 kg in the 1970s, 12.6 kg in the 1980s, 14.4 kg in the 1990s and reached 17.0 kg in 2007. For the period of 2008-09, the average world apparent per capita fish consumption was stable, at about 17 kg/year, and slightly increased in 2010 due to growing demand. Fish prices also have been on the rise in domestic markets as well as in export markets. The FAO Fish Price Index indicates that current fish prices, on average, are higher than ever, in particular for farmed fish (OECD/FAO, 2011).

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On the supply side, total and per capita fish food supplies have expanded significantly in the last five decades, and total food fish supply has increased at an annual rate of 3.1 percent since 1961, while the world population has increased by 1.7 percent per year in the same period (FAO, 2010). At the table below world fishery and aquaculture production can be seen by the years of 2004-2009.

Table 1. World Fisheries and Aquaculture Production

	2004	2005	2006	2007	2008	2009
PRODUCTION (Million tones)						
INLAND						
Capture	8.6	9.4	9.8	10.0	10.2	10.1
Aquaculture	25.2	26.8	28.7	30.7	32.9	35.0
Total inland	33.8	36.2	38.5	40.6	43.1	45.1
MARINE						
Capture	83.8	82.7	80.0	79.9	79.5	79.9
Aquaculture	16.7	17.5	18.6	19.2	19.7	20.1
Total Marine	100.5	100.1	98.6	99.2	99.2	100.00
Total Capture	92.4	92.1	89.7	89.9	89.7	90.0
Total Aquaculture	41.9	44.3	47.4	49.9	52.5	55.1
Total World Fisheries	134.3	136.4	137.1	139.8	142.3	145.1

Source: FAO (2011), The State of Fisheries and Aquaculture 2010, p.21.

In the list of the countries contributing the fish supply, China is on the top of the list as the global leader of marine and inland capture fisheries with 14.8 Mt in 2008, Peru with 7.4 Mt, Indonesia with 5.0 Mt, the USA with 4.3 Mt, Japan with 4.2 Mt. On the other hand Turkey as 29th country in the rank has 494,124 t contributions to this market.

Related to the future projections of this sector, the report prepared by OECD-FAO Agricultural Outlook 2011-2020 gives some clues. World Fish Projections (see Table 2) shows that fishery sector will remain as a promising sector in the future. Production will increase by both aquaculture and capture fisheries, besides consumption shows a tendency to rise year by year.

Table 2. World Fish Projections

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
World											
Production	kt	147439	149870	152822	155856	154969	159331	161508	163405	165294	164094
Of which aquaculture	kt	57 278	59 449	61 726	64 241	66 397	67 525	69 337	71 049	72 803	73 683
Consumption	kt	147568	149898	152799	155782	154844	159230	161406	163302	165191	163991
Of which for food	kt	120219	122766	122586	128511	129422	131768	134130	135955	137666	137765
Of which for reduction	kt	20 299	20 022	20 054	20 061	18 162	20 151	19 916	19 937	19 889	18 490
Price											
Aquaculture (1)	\$/t	2091,1	2156,7	2174,7	2174,3	2315,2	2357,4	2429,6	2505,3	2622,4	2825,3
Capture(2)	\$/t	1158,9	1212,6	1180,2	1172,8	1228,3	1196,0	1201,4	1186,3	1191,7	1223,1
Trade (3)	\$/t	2734,4	2839,5	2790,1	2769,6	2904,7	2878,6	2917,1	2927,9	2989,4	3131,9

Source: OECD-FAO AGRICULTURAL OUTLOOK 2011-2020.

Turkey, as a peninsula, with its geostrategically advantageous position in the world, has to widen its share in this market. To reach its 2023 macro economic targets, fishery sector can be a strategic sector and profitable in the long term. In this study we are going to analyze Turkish fishery industry by using SWOT analysis to explore the current constraints and future possibilities of the sector to provide information to policy makers for future developments.

2. Literature Review

SWOT, is an acronym from its principal components: Strengths, Weaknesses, Opportunities, and Threats (Glaister & Falshaw, 1999). In itself, SWOT is not an analysis but, as a tool, it can aid in effectively performing a broad analysis (Duarte, et al., 2006). In strategic planning categorizing issues into strengths, weaknesses, opportunities, and threats is one of the most respected and prevalent tools (Glaister and Falshaw, 1999).

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