

Extraits du Rapport FAO Globefish –Février 2014 – Tendances des prix des poissons en Europe

The European Fish Price Report is a monthly subscription GLOBEFISH publication. The Report is based on information supplied by industry correspondents. It aims to provide guidance on broad price trends. Price information is indicative and should be used only for forecasting medium- and long-term trends.

Groundfish

According to the Norwegian Seafood Council, this year started off with record-high cod exports in terms of both value and volume (+10% compared with last year's figures). In addition, cod prices were somewhat higher compared with last year. Norwegian saithe and haddock exports also increased substantially. In particular, frozen product exports increased by 30% on last year's figures, with China as the number one importing market. In contrast, clipfish and aquaculture product exports decreased substantially. Salted fish exports also decreased in volume but prices were up. The biggest market for salted fish was Portugal, buying at an 8% higher price compared with January last year. Dried fish exports increased by 58% in terms of quantities, although exports of Lofoten dried cod to Italy decreased by 20% at a falling average price.

In the Far Eastern region of Russia, during the first two months of the current year, Alaska Pollock catches have been very good for a total of 282 100 tonnes (+51 200 tonnes compared with 2013). In Moscow, during the second week of February, the >25 cm wholesale Alaska Pollock price was stable while the >30cm price was up to RUB 68/kg (EUR 1.40/kg). The headed and gutted price was also up to RUB 64/kg (EUR 1.33/kg). In Vladivostok, a further decline in prices is expected at the end of February/beginning of March (around RUB 45/kg (EUR 0.94/kg). Currently, on the Vladivostok domestic market, the wholesale price for Alaska Pollack headed and gutted >25cm is around RUB 50-52/kg (EUR 1.00/kg). On the export market, the price remains at USD 1 350-1 400/tonne. There are no new offers this month due to the New Year celebrations in China.

In Peru and Ecuador, the hake season will probably close in March as a natural ban, requested by quota owners and government authorities. This ban usually lasts for 30 days and therefore prices are expected to increase for April and May orders.

Tuna

Fishing in the Western and Central Pacific has slowed down, but with inventory levels still high in Bangkok, the skipjack price has dropped further to USD 1 280/tonne CFR and even lower.

Fishing in the Eastern Pacific is slow, mostly consisting of skipjack. The skipjack price ex vessel Manta has declined to USD 1 550/tonne. The price of large yellowfin has increased to USD 2 450/tonne.

The ban on FAD deployment in the ICCAT exclusion zone has resulted in slow fishing in the Atlantic Ocean. The skipjack price has fallen slightly to EUR 1 030/tonne ex vessel Abidjan, while the yellowfin price has increased to EUR 2 070/tonne.

The Indian Ocean is experiencing good fishing, both on FADs and on free-school yellowfin. Demand from local processors is low and vessels continue to tranship their catches to other markets. The skipjack price has plunged to EUR 800/tonne and yellowfin to EUR 1 600/tonne FOB Mahe.

Demand from European markets has decreased, causing prices to fall to EUR 900/tonne CFR Spain for skipjack and EUR 1900/tonne CFR Spain for yellowfin. With the zero-duty loins quota filled, the market price for cooked, double cleaned yellowfin loins has fallen to USD 8 300/tonne DDP Italy.

Thailand is the second largest canned tuna exporter into the EU after Ecuador (which will benefit from a 0% duty tariff for all of 2014). For the first ten months of 2013, the EU imported 328 190 MT of canned tuna (excluding precooked tuna loins) valued at USD 1.91 billion, representing an increase of 11% in volume and 26.9% in value over the same period of 2012. During the same period Thailand exported 42 807 MT of canned tuna, up almost 35% compared to 2012.

Small Pelagics

Adverse weather conditions in the UK delayed mackerel catches, although this did not result in a subsequent price increase.

Norwegian pelagic vessels are presently focusing on the search for Icelandic capelin. The Norwegian quota share of 49 189 tonnes was to be taken latest by 15 February, but the Icelandic authorities have granted an extension until 22 February. There have meanwhile been some vessels out also for Barents Sea capelin, however no significant landings are expected for meal and oil due to the small quota this year (38 980 tonnes), mostly for roe extraction. The spring spawning herring total landings reached 105 000 tonnes against the preliminary 276 221 tonne quota (still a large proportion for filleting and about 50% for fishmeal and oil).

In Denmark, the first 1 901 tonnes of boar fish landings were reported during the first week of this month. Total sprat catches from the Baltic Sea reached 19 254 tonnes (against a full January catch last year of 25 721 tonnes)...

In Russia, Pacific herring catches amounted to 42 200 tonnes in mid-February, which corresponds to a 28 400 tonne decrease on the same period last year. On the domestic wholesale market in Moscow, there is an active demand for large and fat Pacific herring and Atlantic herring, >300gr/pc, due to good quality at competitive prices.

The price of large and fat Pacific herring 250-300gr/pc is RUB 30/kg (EUR 0.6/kg), which is considered low. The Pacific herring price on the Vladivostok wholesale market is stable.

Demand is good for small sizes (200-300gr/pc) and for large ones (>400gr/pc) while demand for medium sizes (300gr/pc) is less evident. The price for Pacific herring 200-300 gr/pc was at RUB 18-22/kg (EUR 0.37-0.46/kg) at the beginning of this month, while the price for >300 gr/pc was at RUB 33-35/kg (EUR 0.69-0.73/kg). On the export market, demand is weak and the price is around USD 600-650/tonne.

Cephalopods

In Peru and Chile, giant squid landings have increased compared with previous months. Chile has better volumes but Peru is now increasing the number of vessels targeting *dosidicus gigas* as the mahi mahi season is over. Demand is increasing but the price remains stable.

In South Africa, after a short period of moderate squid catches, the situation has become quiet again and catching is again very slow. There is little juvenile squid in the catch, which is not a good sign.

Crustaceans

conditions, landings of Europeancaught crustaceans, such as *Cancer pagurus* and *Homarus gammarus*, have been poor and prices are consequently slightly above the seasonal norm.

The American lobster market is very quiet. There are still small stocks available in Canada and Europe, although these are getting low. The market is now waiting for the new season which will start on 1 May.

Shrimp

On the European market, *vannamei* prices continue to hold firm this month at a high level as supply remains limited and demand strong worldwide.

This situation is not expected to change in the short to medium term. The Early Mortality Syndrome (EMS) situation seems now to be under control in affected Asian countries but shrimp supplies will be seasonally low until March/April as most producing countries are outside the harvest period.

Therefore, the European market, which continues to suffer from economic sluggishness, is expected to remain slow as prices are not likely to soften before April. In addition, the market is also suffering from low availability. This month, demand has been strong in East Asian markets for the Lunar New Year celebration. Meanwhile, some major producing countries such as Thailand and Viet Nam have been forced to increase their shrimp imports in order to maintain activity in factories. Thailand, devastated by the disease, saw its production cut in half in 2013 and its shrimp exports decrease by 40% compared with the year before. China, affected by EMS but also with a growing domestic market, has also increased its shrimp imports. In 2013 China imported 71 292 tonnes of shrimp, corresponding to a 30% increase on 2012 annual figures.

Bivalves

On the mussel French market, a large number of Dutch, Irish and Spanish mussels is reported as the Bouchot season has come to an end.

Oyster prices remain strong in Europe due to low availability.

In Peru, scallop harvesting has decreased and raw material prices have gone up. The new price increase has not yet been accepted by the French and American markets but with a growing demand, sale prices are not likely to lower until August, when the new harvest starts.

Freshwater Fish

This month Nile perch prices are up again. Strong demand for fresh products and low catches have resulted in very low offers for frozen fillets.

Tilapia and pangasius production is affected this month by the slow start of factories in Asia after the Lunar New Year. Tilapia supply is very short in China. A slow upward price trend is reported for pangasius and is expected to be confirmed in March.

In February, there was no significant change of carp prices from Hungary.

Seabass/Seabream/Meagre

A long awaited recovery in prices has given rise to new optimism among Mediterranean producers as quotations jumped in late January by between 15 and 30% depending on size. It is not unusual that prices climb during this period but the magnitude of the increase has caught the market by surprise. Some Greek producers report a shortage of bream although quotations have risen by around the same amount for both species.

On the demand side, markets are fairly stable so the cause of the price recovery lies firmly on the supply side. Industry observers point out that more stability in prices over the next years would be beneficial, to producers and buyers alike, by avoiding the boom and bust cycle observed far too frequently.

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