

## Extrait du rapport FAO Globefish – Tendence des prix des poissons sur le marché Européen – Mars 2014.

### Groundfish (poissons de fond)

According to the Norwegian Seafood Council, Norwegian exports of cod, saithe and haddock amounted to more than NOK 1.15 billion in February, representing an increase in value of 48% compared with February last year. In volume, exports of all codfish increased by 33%, at prices somewhat higher than last year's.

In Europe, the price trend for wet-salted cod fillets (*Gadus Macrocephalus*) is now stable after the increase of past months. Importer stocks remain low, but supply is slightly improving. For wet-salted cod fillets (*Gadus Morhua*) from fresh raw material, demand is very strong from Spain for the traditional consumption of the Lent period while the Italian market is slowing down...

At the beginning of March, Russian catches of Alaska Pollock amounted to 512 200 tonnes (42 900 tonnes more than last year). In January, the Russia Far East registered a decrease in its total fish exports of 45% in volume and 21% in value compared with last year. The share of Alaska Pollock in total fish exports decreased from 39% to 22%. Presently, on the domestic market, supply is lower than normal and prices are expected to rise as most of the recent Alaska Pollock catches have been exported. The market in Moscow is waiting for future developments linked to high inflation and the decline of the Ruble. The seasonal drop in prices is not expected this year.

### Flatfish (poissons plats)

In Spain, growing conditions for turbot continue to be very good this month and therefore farms are fully occupied. Demand is still very weak and consequently prices continue to drop.

### Tuna

Fishing in the Western and Central Pacific is only moderately good as vessels are being affected by adverse weather conditions. However, as inventory levels in Bangkok remain high, the skipjack price has dropped further to USD 1200/tonne.

Fishing in the Eastern Pacific is improving and due to high inventories, ex-vessel prices in Manta of both skipjack and yellowfin have dropped to USD 1 400/tonne and USD 2 400/tonne respectively.

There has been a drop in catches in the Indian Ocean, with vessels mostly targeting skipjack on FADs. The skipjack price has fallen slightly to EUR 775/tonne FOB Mahe. The yellowfin price has increased to EUR 1 800/tonne FOB Mahe because of low supply.

In the Atlantic Ocean fishing continues to be poor. However, in spite of low catches the skipjack price has fallen to EUR 1 000/tonne ex-vessel Abidjan. The yellowfin price has

also decreased to EUR 2 000/tonne. Fishing is expected to improve with the reopening of the ICCAT exclusion zone this month.

On the European market, the skipjack price has remained at EUR 900/tonne CFR Spain. However, as a result of the low supply from both Atlantic and Indian Oceans, the yellowfin price has increased to EUR 2 100/tonne CFR Spain. The market price for cooked, double-cleaned yellowfin loins has fallen slightly to USD 8 200/tonne DDP Italy.

## **Small Pelagics**

On 12 March, after a long series of negotiation rounds, EU, Norway and Faroe Islands have agreed in London on a five-year arrangement for mackerel in the North-East Atlantic. The arrangement establishes a number of important principles, including a commitment to sustainable fisheries, a sharing between the parties, and a commitment to establish a new long-term management plan in 2014 following ICES advice. Iceland was left out of the agreement but the agreement makes room for another coastal state to join at a later stage. The arrangement comes after several years without common coastal state management of this important fish stock. Following the arrangements, the TAC for mackerel for 2014 was set at 1 240 000 tonnes. The parties have agreed to maintain the same relative shares for 2015-2018 as agreed now for 2014: EU 58.4%, Faroe Islands 14.93%, and Norway 26.67%, corresponding to 611 205 tonnes for EU, 156 240 tonnes for Faroe Islands and 279 115 tonnes for Norway. A “reserve” of 15.6% has been included in the announced TAC.

So far, Russian catches of Pacific herring have decreased this year compared with 2013 because of a reduced number of fishing vessels. However, it is reported that in January the proportion of herring in total fish exports increased from 51.7% to 61.2% compared with January 2013. On the domestic market in Vladivostok the Pacific herring price is stable at EUR 0.36-0.44/kg for 200-300 gr/pc and EUR 0.65-0.69/kg for >300 gr/pc. At the wholesale market in Moscow the price is at EUR 0.56/kg for >250 gr/pc.

## **Cephalopods**

In South African inshore waters, a season of fishing closure has been decided on for squid during the period April, May and June in order to try and encourage juvenile squid to settle on the spawning grounds. Presently local stocks are almost nil and prices are based on very low volumes.

## **Crustaceans**

American lobster is out of season until 1 May and stocks are very low.

Landings of European-caught crustaceans, such as *Cancer pagurus* and *Homarus gammarus*, have been very poor in February because of exceptionally difficult weather conditions and recordbreaking wind forces. With low supply, prices remain consequently high.

## **Trout (truite)**

Growth in the salmon market is being largely mirrored by demand for trout, as the Norwegian Seafood Council reported exports of Norwegian trout increased by NOK 62 million or 45%, to a total of NOK 201 million in February 2014. Meanwhile, volumes were up by 5% compared with February 2013. Russia was the biggest market for Norwegian trout in February.

In Southern Europe, the trout sector remains for the most part a domestic industry targeted at domestic consumers. In Turkey, which has become the largest trout producer in Europe, consolidation is now under way with more focus on value-added products for both domestic and international markets.

### **Freshwater Fish ( poisons d'eau douce)**

There is currently a shortage in raw material for most freshwater fish products which, coupled with strong demand, is pushing prices up. The tilapia shortage from China is expected to last until the next harvests. Pangasius prices from Viet Nam are up because of the shortage and many packers are delaying shipments. Nile perch prices are also up because demand is high and very little frozen products are available.

A slight decrease in prices for live carp and for other carp products is reported on the European market.

### **Seabass/Seabream/Meagre (bar, dorade, maigre)**

Prices stabilized during March after a large upward push in previous months. Further price hikes are still expected during the next quarter as several companies are finishing up their stock of market-sized fish.

On the supply side, Turkish producers in particular continue to add capacity both in production and in processing, aiming to increase exports of value-added products. Turkish companies are also investing in other Mediterranean countries including Morocco where a large farm is reported to start producing in a few years time.

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