

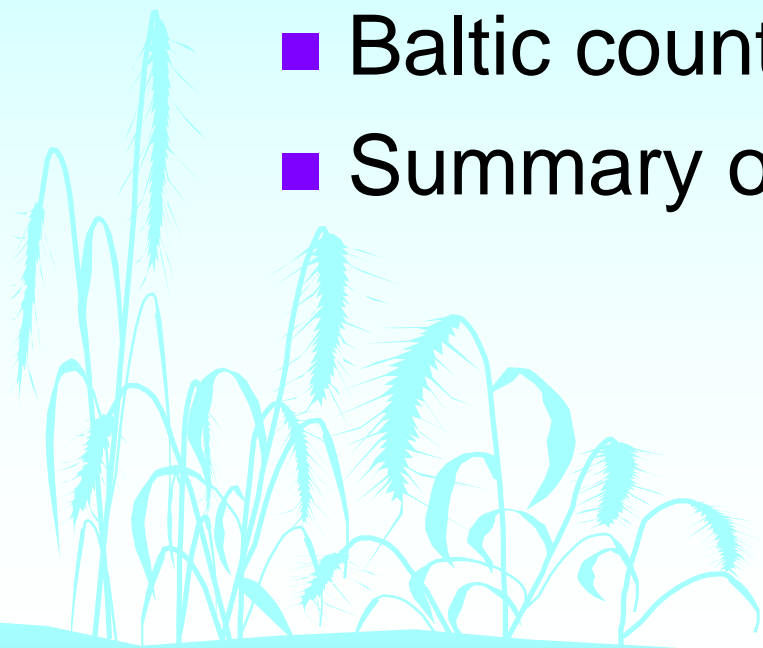
Fish canning industry

European Fisheries Fund and opportunities for fishery and aquaculture product processing Conference

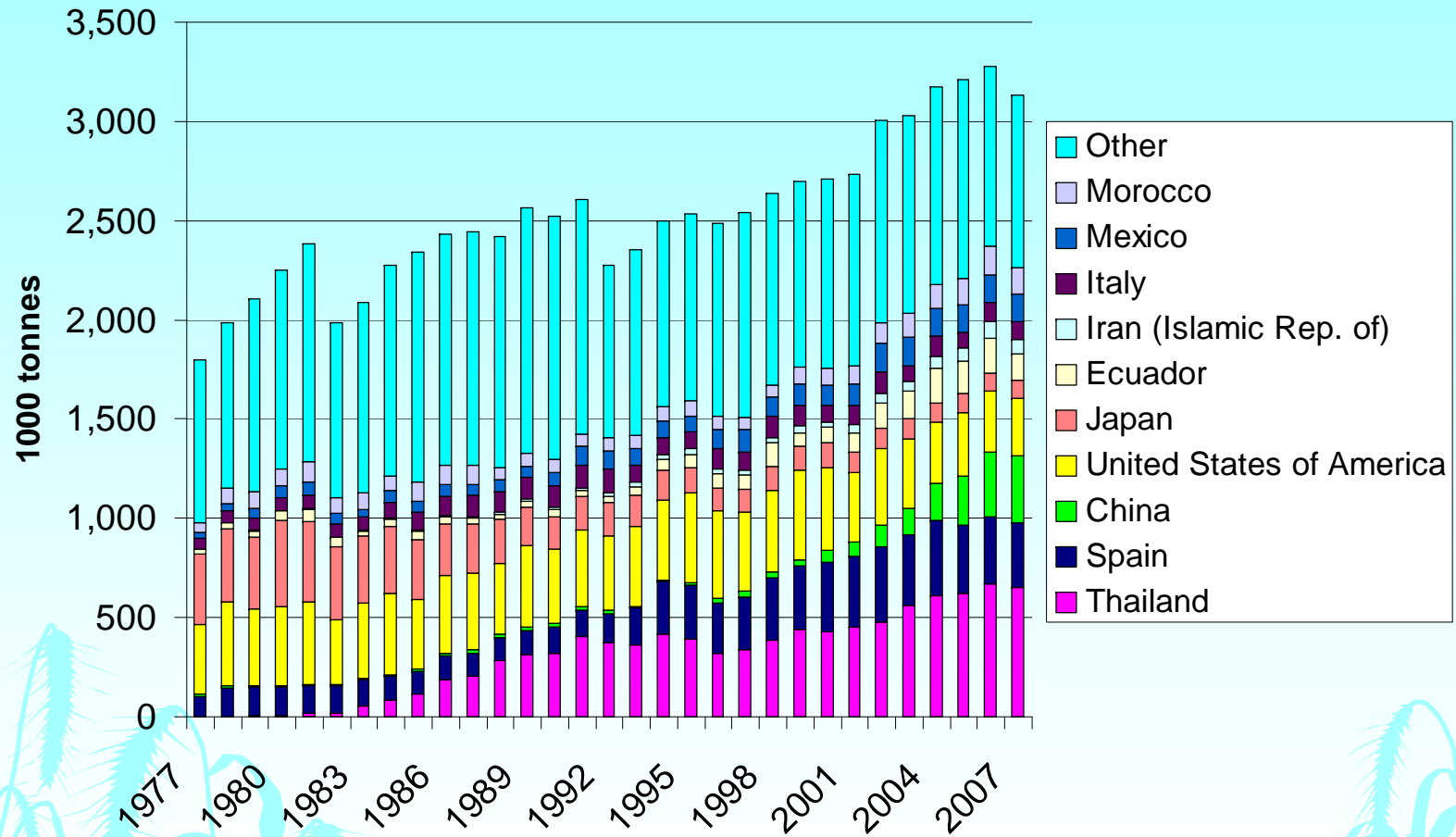
Latvia, October 2009

Outline

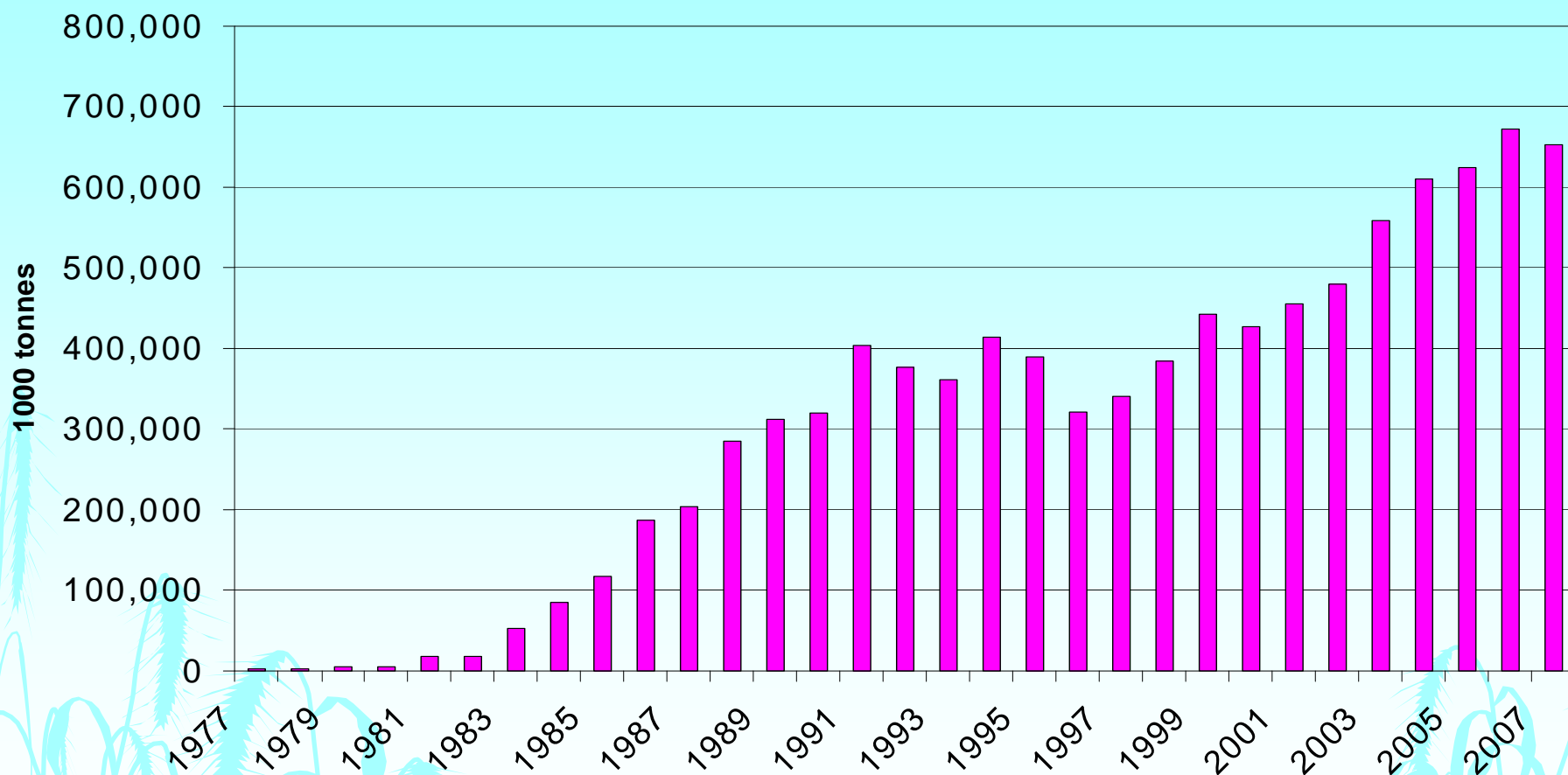
- General overview
- Main fish canning countries and industrial developments
- Baltic countries and Poland
- Summary of findings



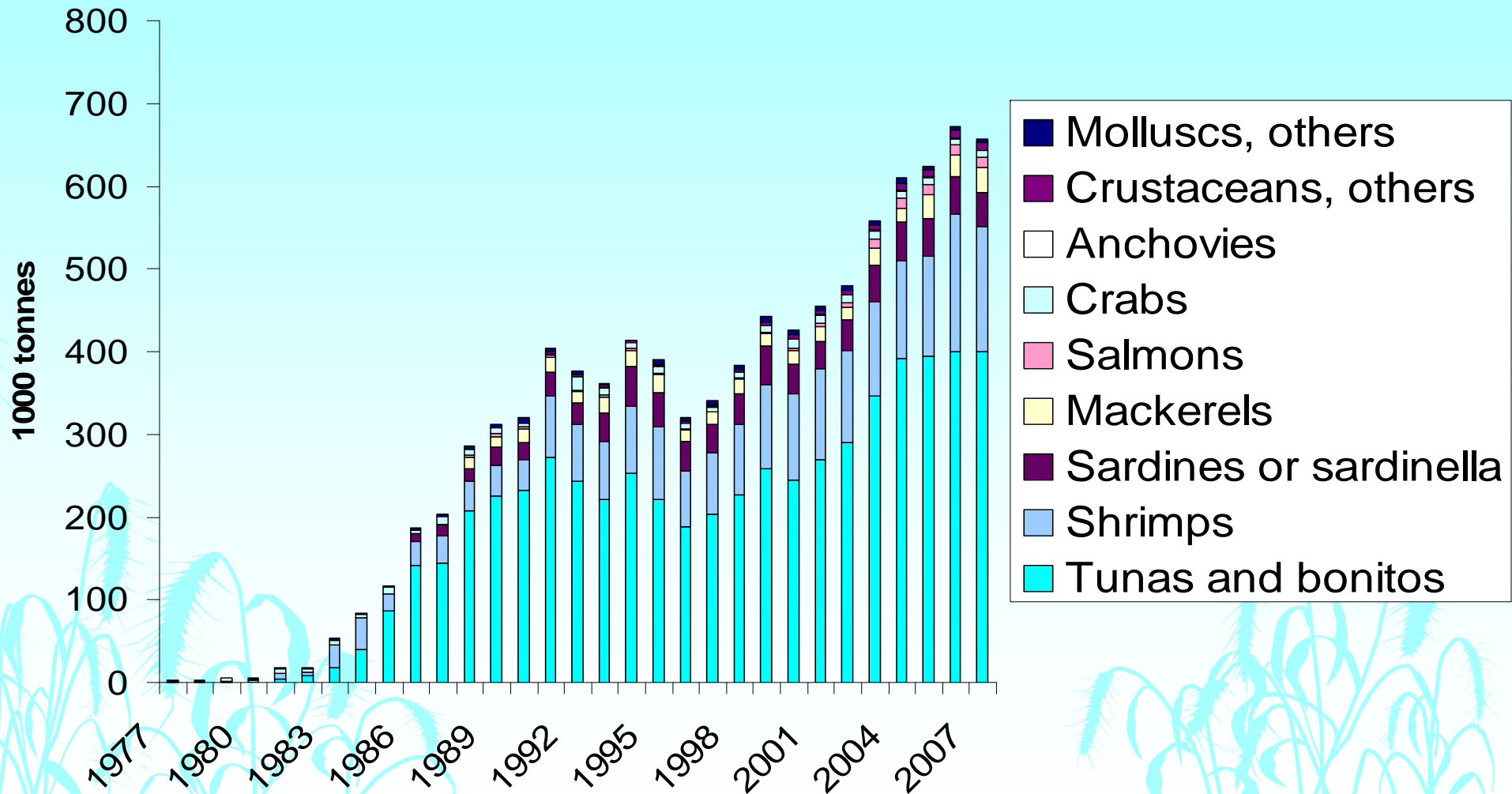
Canned Fish production



Canned Fish production - Thailand



Canned Fish production - Thailand



Preserved Fish production - Thailand



Thai Union is Thailand's main canned tuna producer, Chicken of the Sea brand was bought some years ago



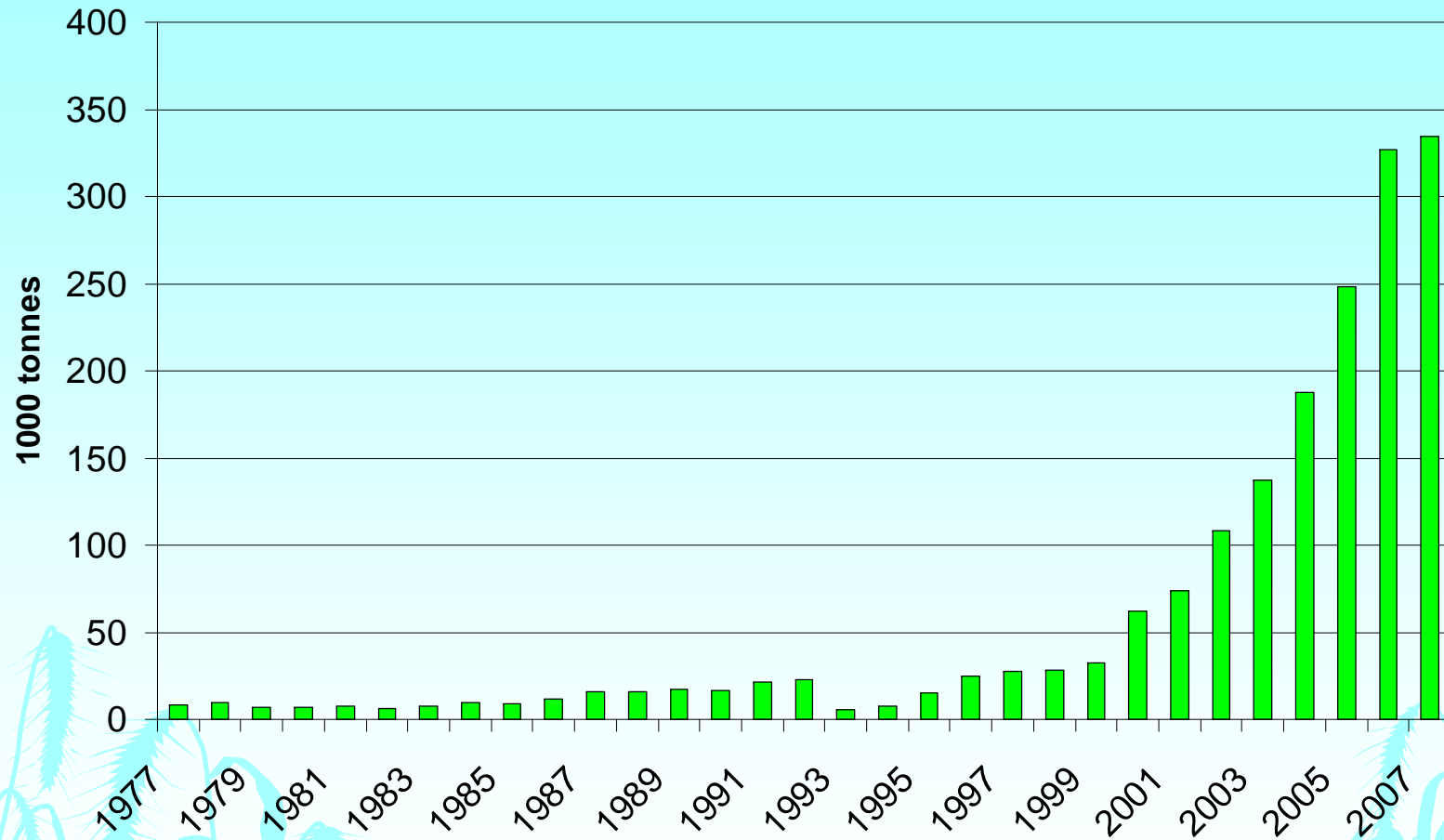
Sea Value second major company, joins UNICORD and ISA groups

Preserved Fish production - Thailand

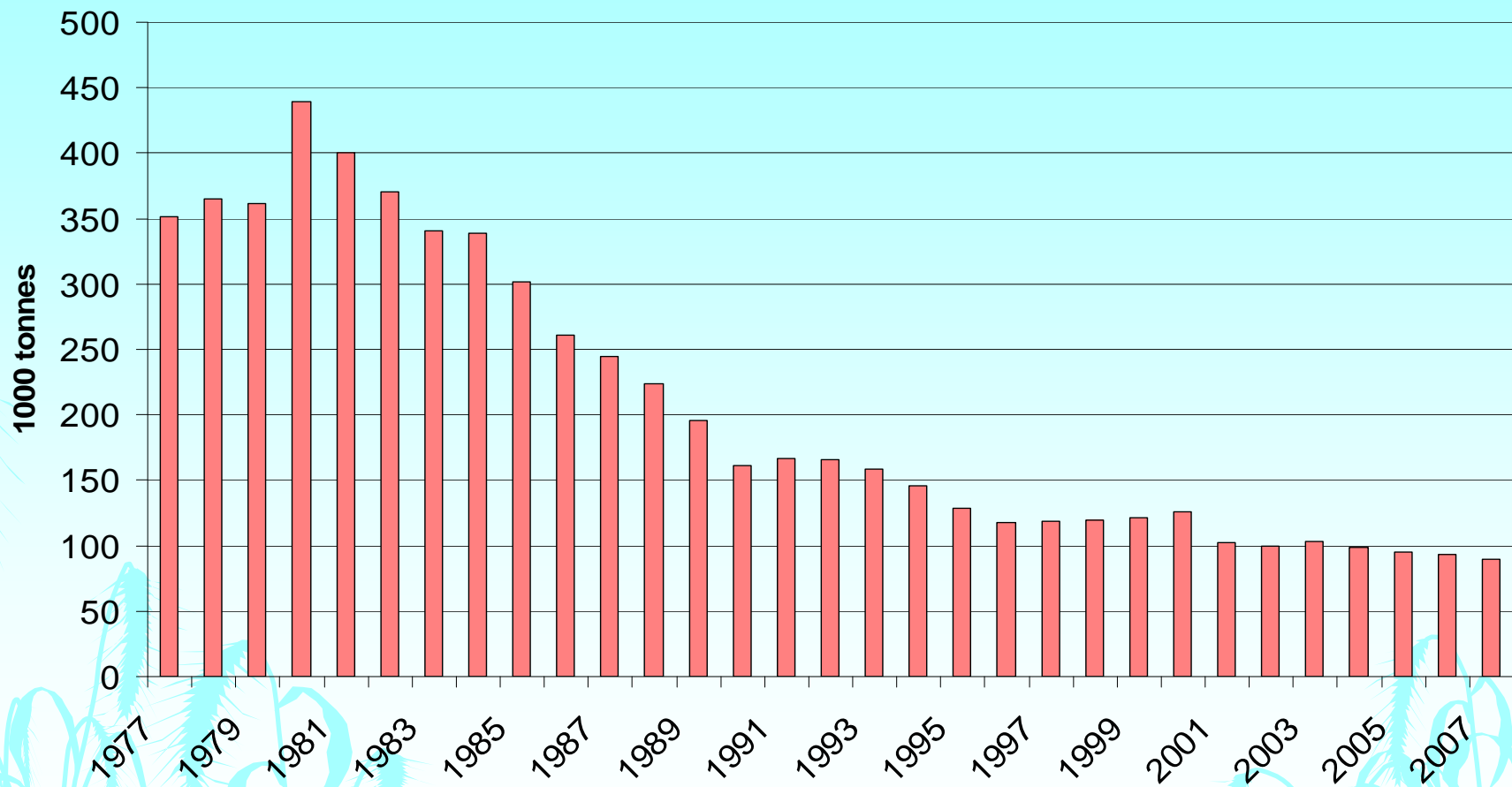
- Thailand dynamic industry
- links with US brands
- almost all raw material imported
- free trade agreements very important



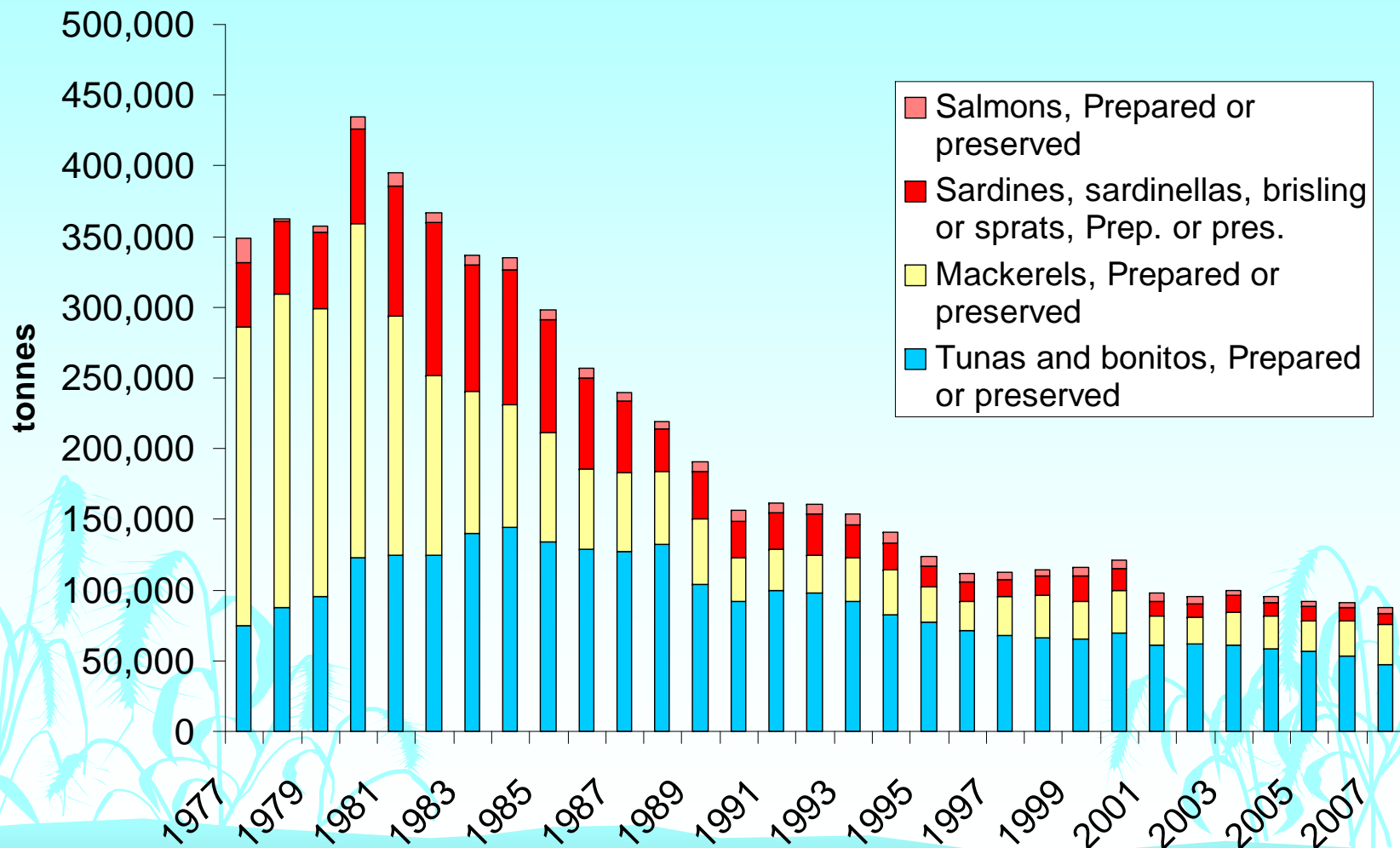
Canned Fish production - China



Canned Fish production - Japan



Canned Fish production - Japan



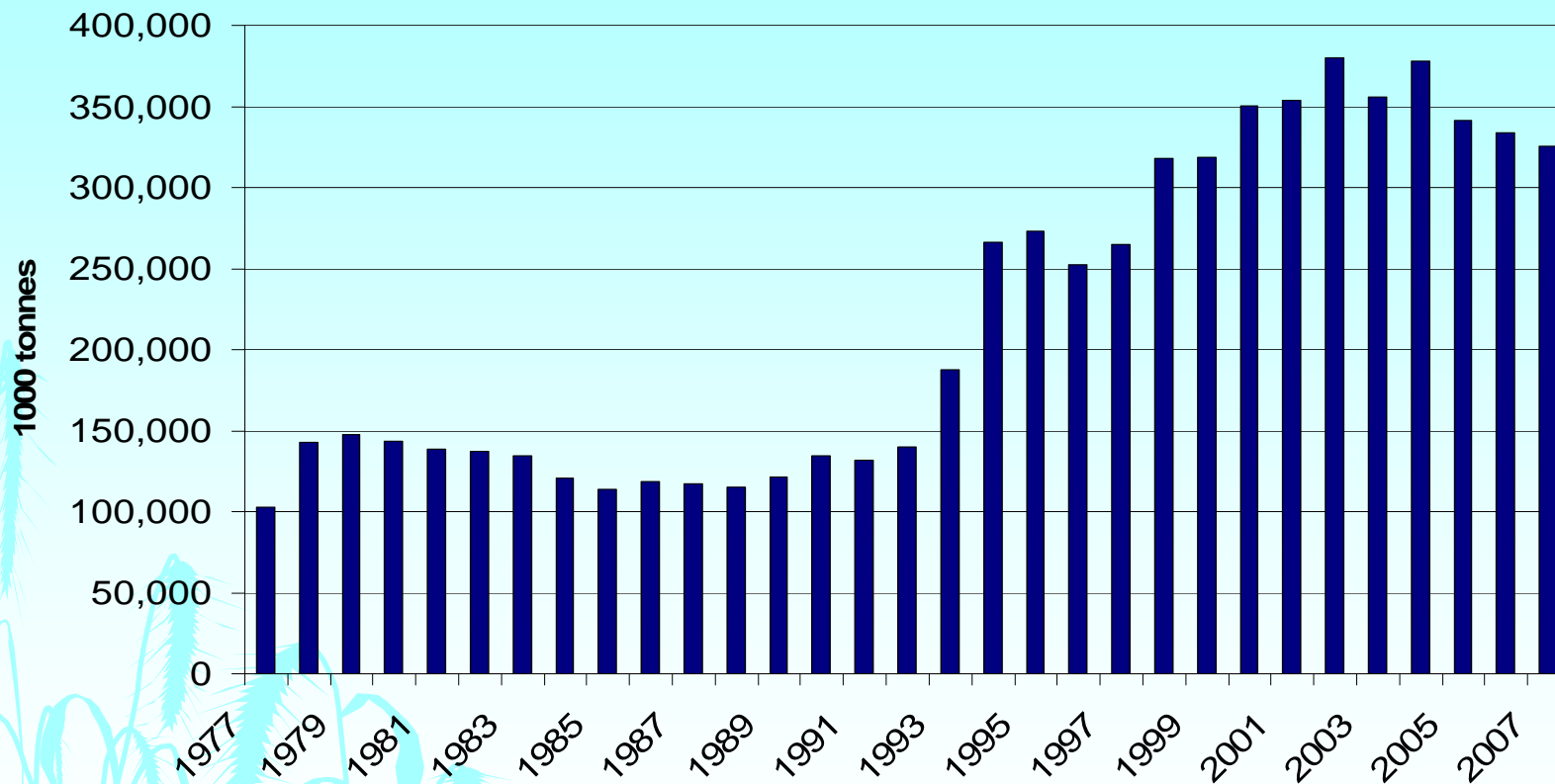
Preserved Fish production – Japan



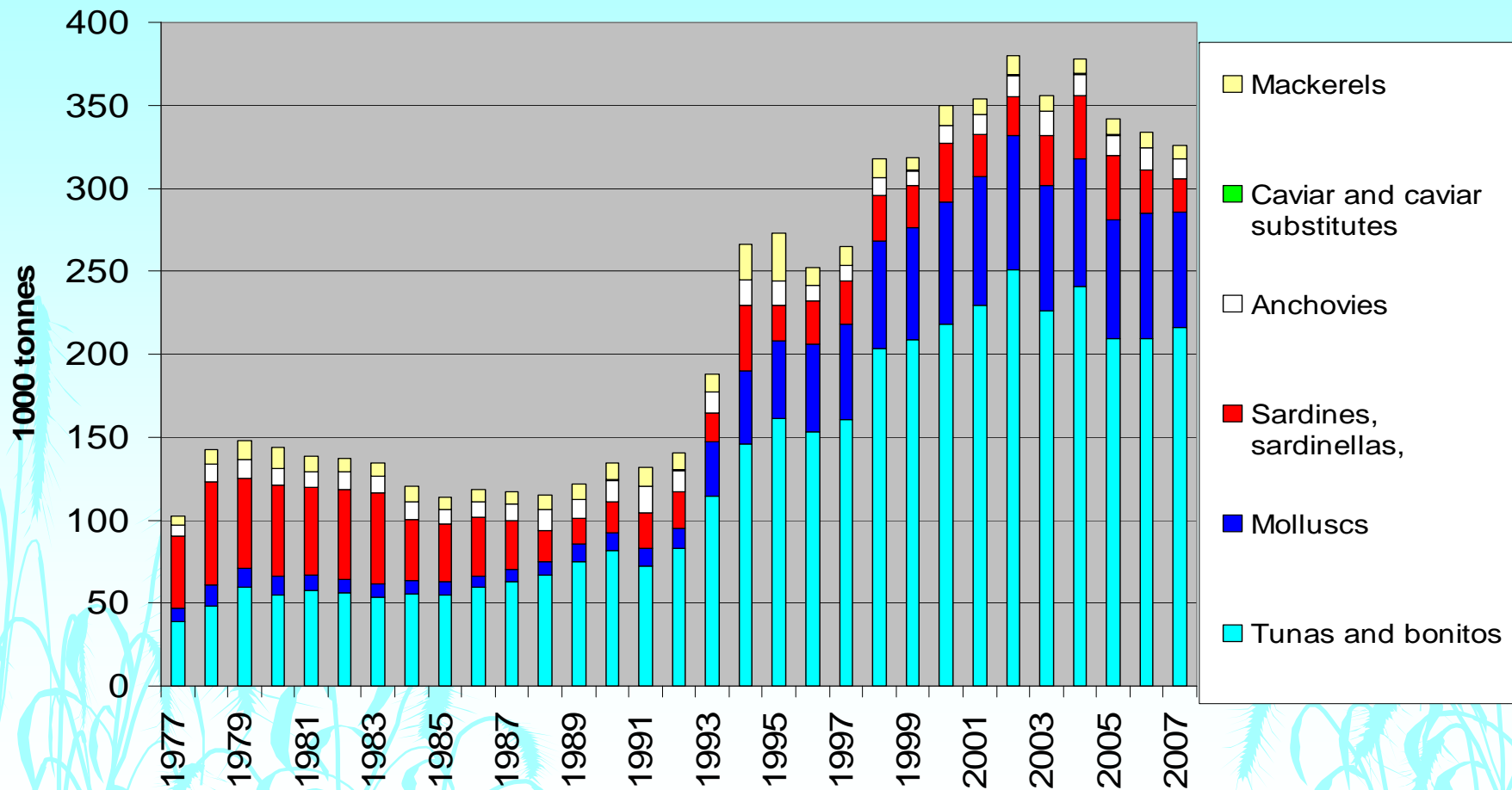
- Maruha Group main canned fish producer in Japan
- Nippon Suisan Kaisha, commonly called NISSUI is second major producer
- Health aspect new selling argument



Canned Fish production - Spain



Canned Fish production - Spain



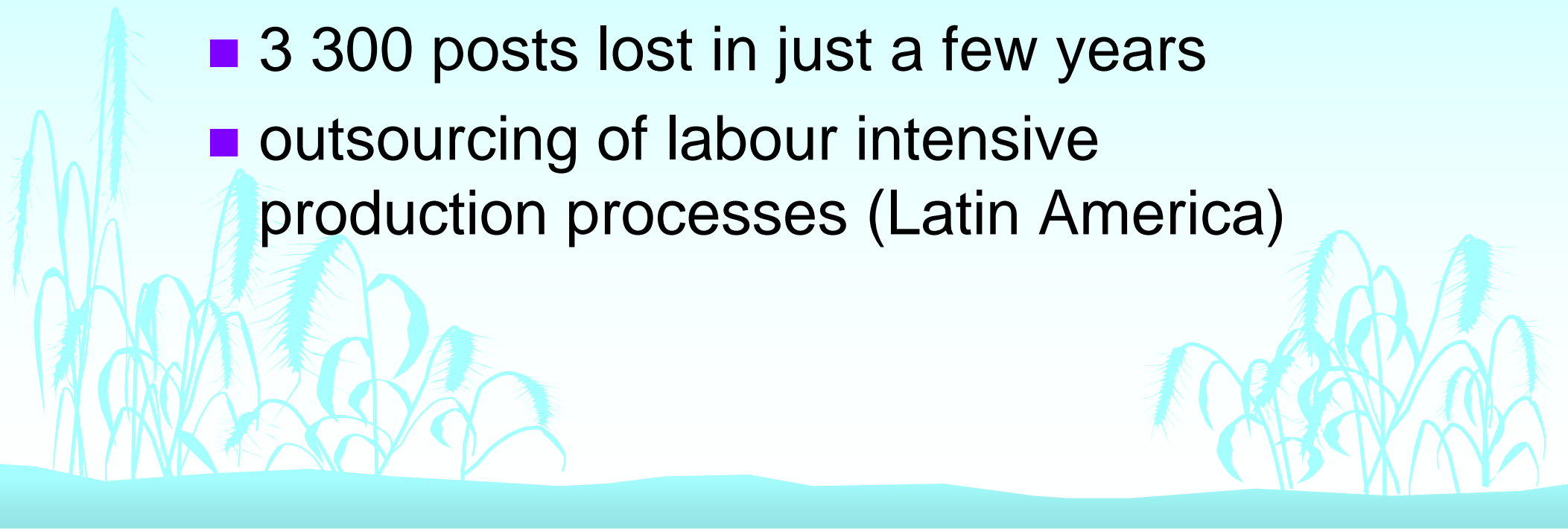
Canned Fish production - Spain



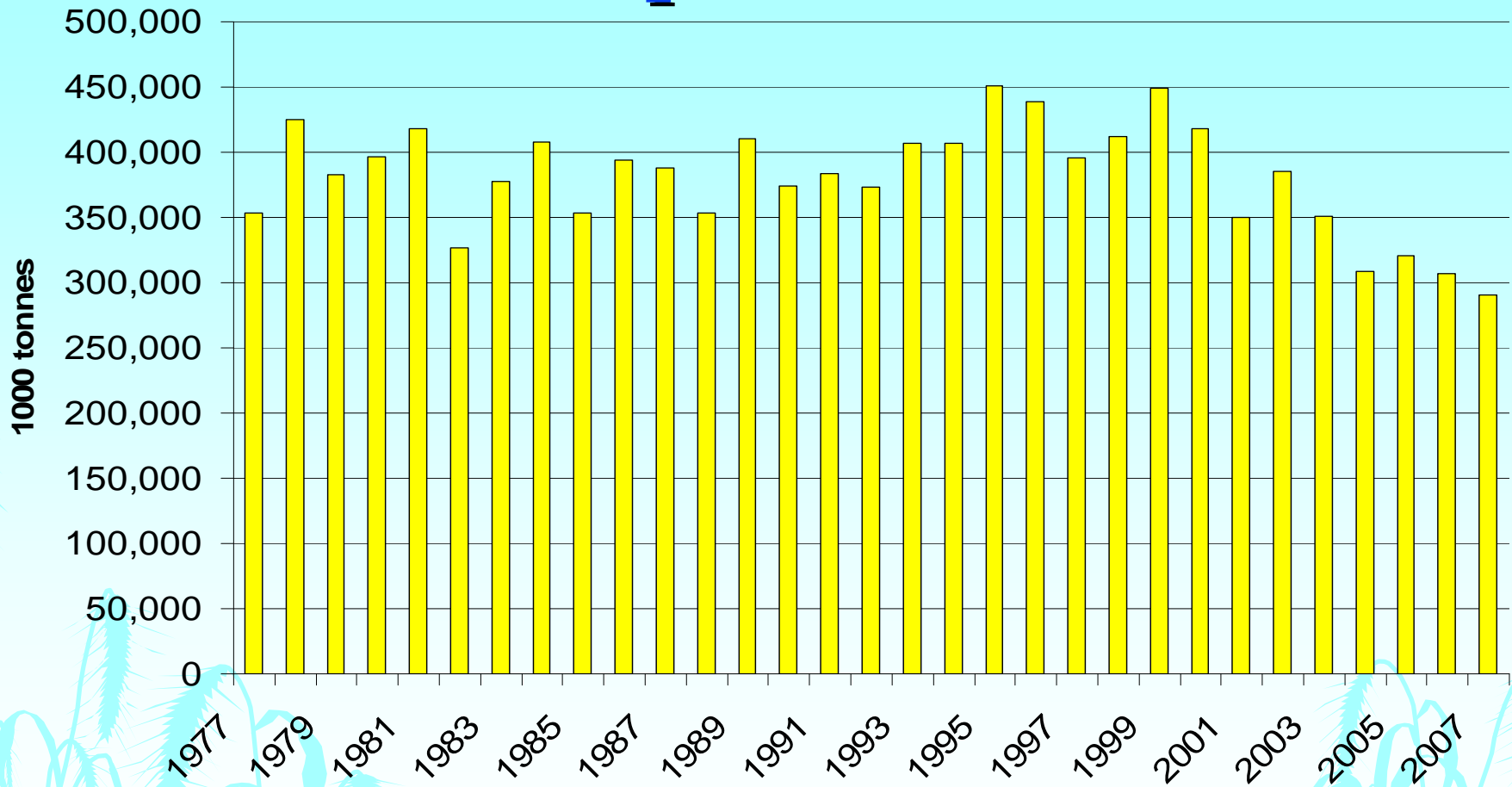
- Calvo
 - Isabel
 - Rianxeira
- main canned tuna brands in Spain
- increased purchase of Italian brands

Galicia – loss in employment

- 12.000 2008
- 15.363 2004
- mainly women
- 3 300 posts lost in just a few years
- outsourcing of labour intensive production processes (Latin America)



Canned Fish production - USA



US canning



- started in 1903
- tuna canning in San Diego started in 1911
- boom in the 1950s and 1960s
- last tuna cannery in San Diego closed in 1984
- in 2009 return to US mainland for tuna canning!!

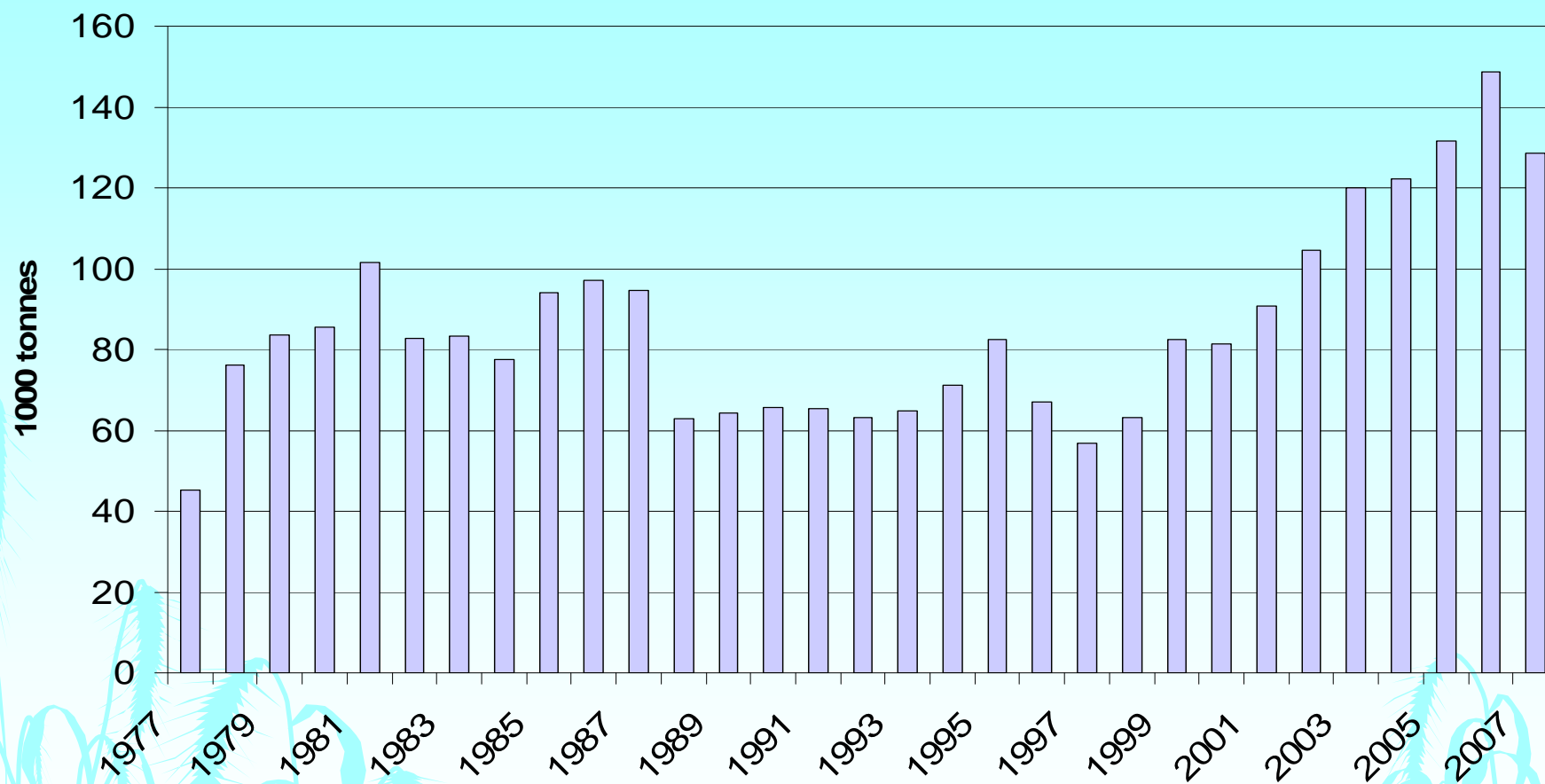
US canning



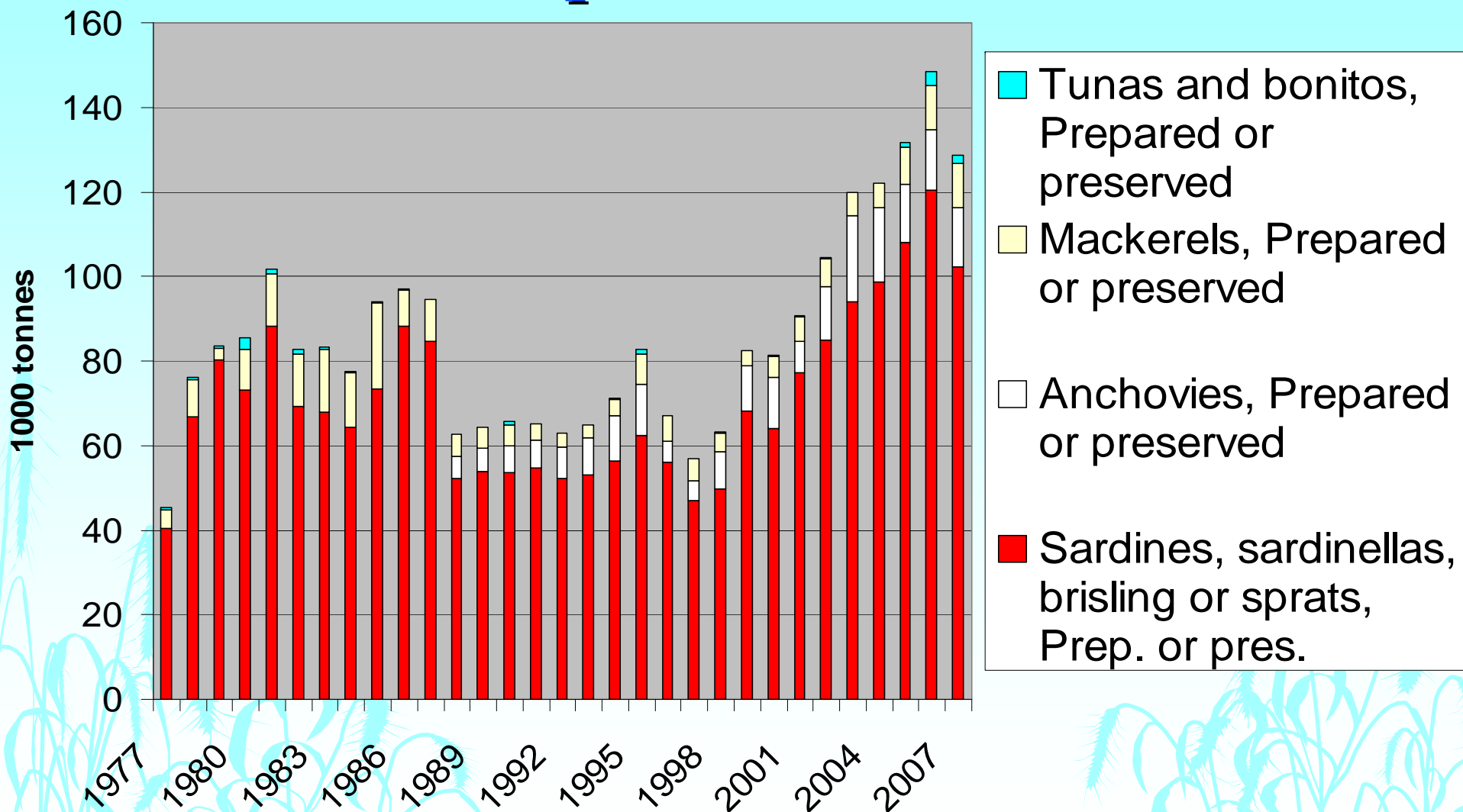
- StarKist closed cannery in Puerto Rico in 2001
- Star-Kist tuna cannery in American Samoa closed in 2009



Canned Fish production - Morocco



Canned Fish production - Morocco

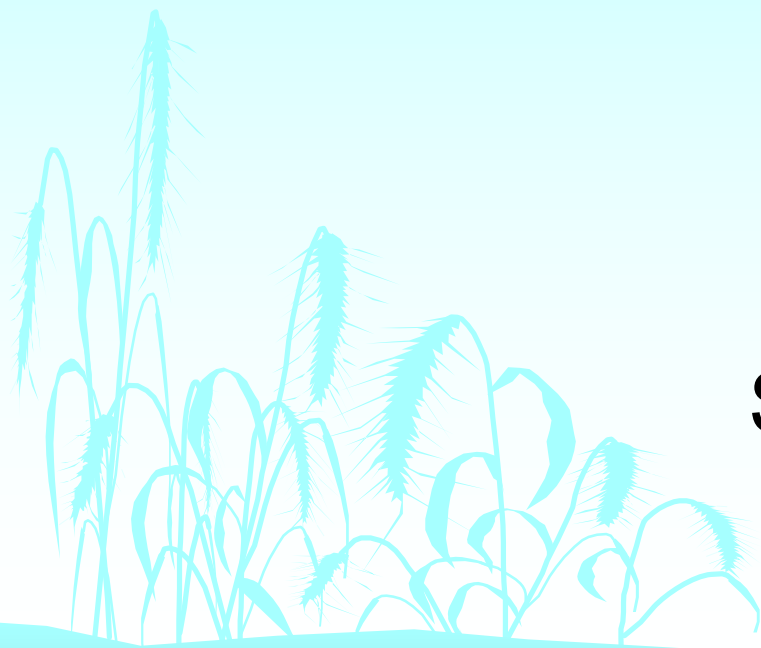


Canning industry in Poland and Baltic states

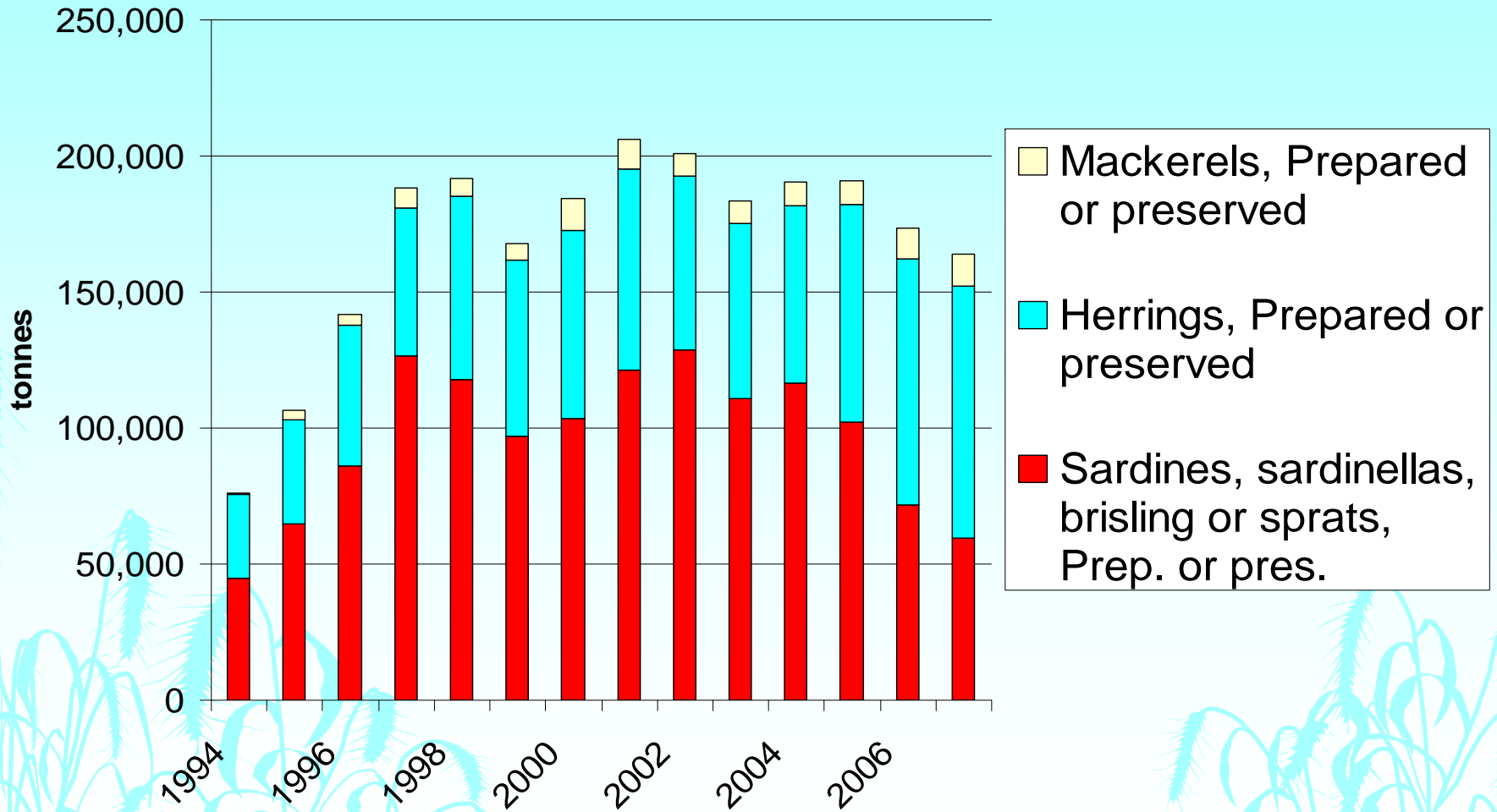
Helga Josupeit

FAO

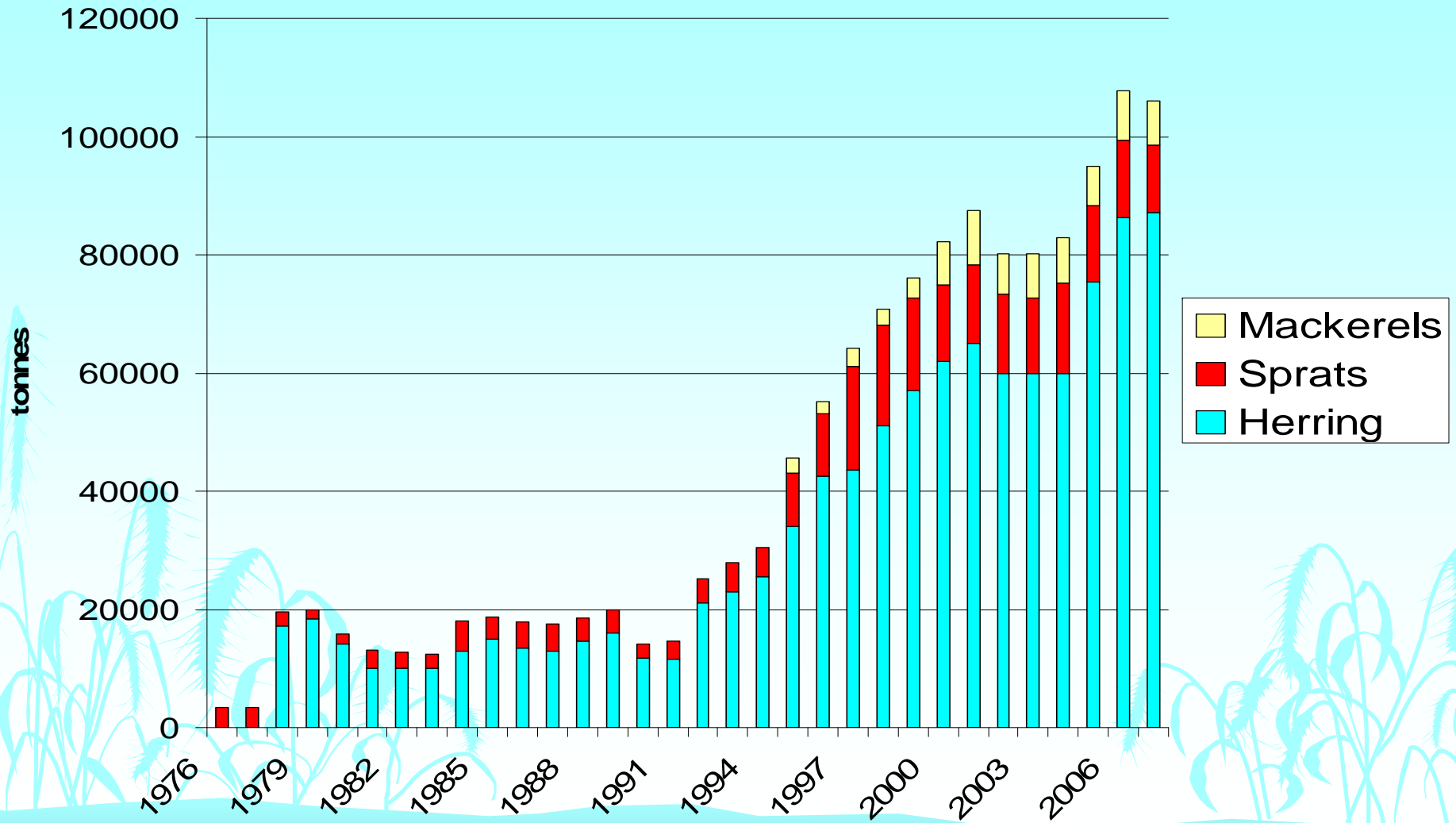
September 2009



Production of canned fish in Poland and Baltic States

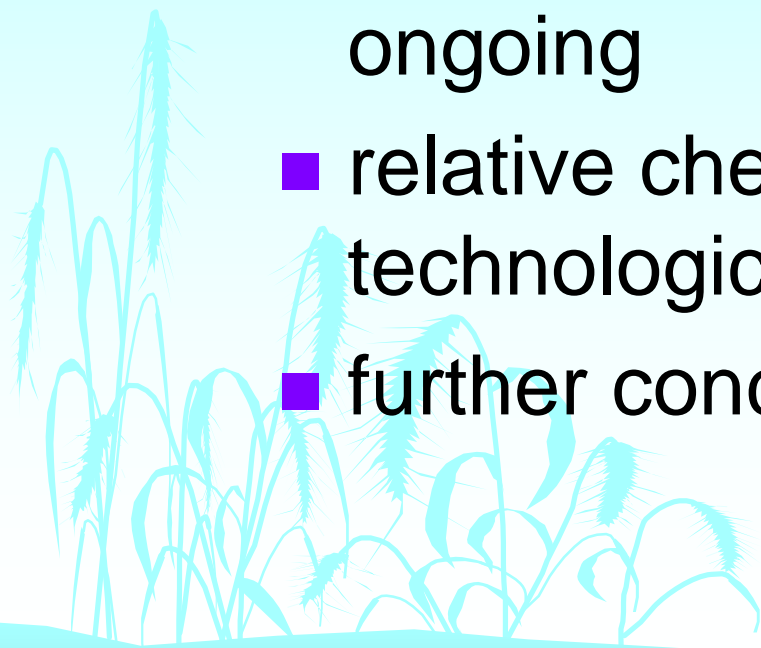


Production of canned fish in Poland

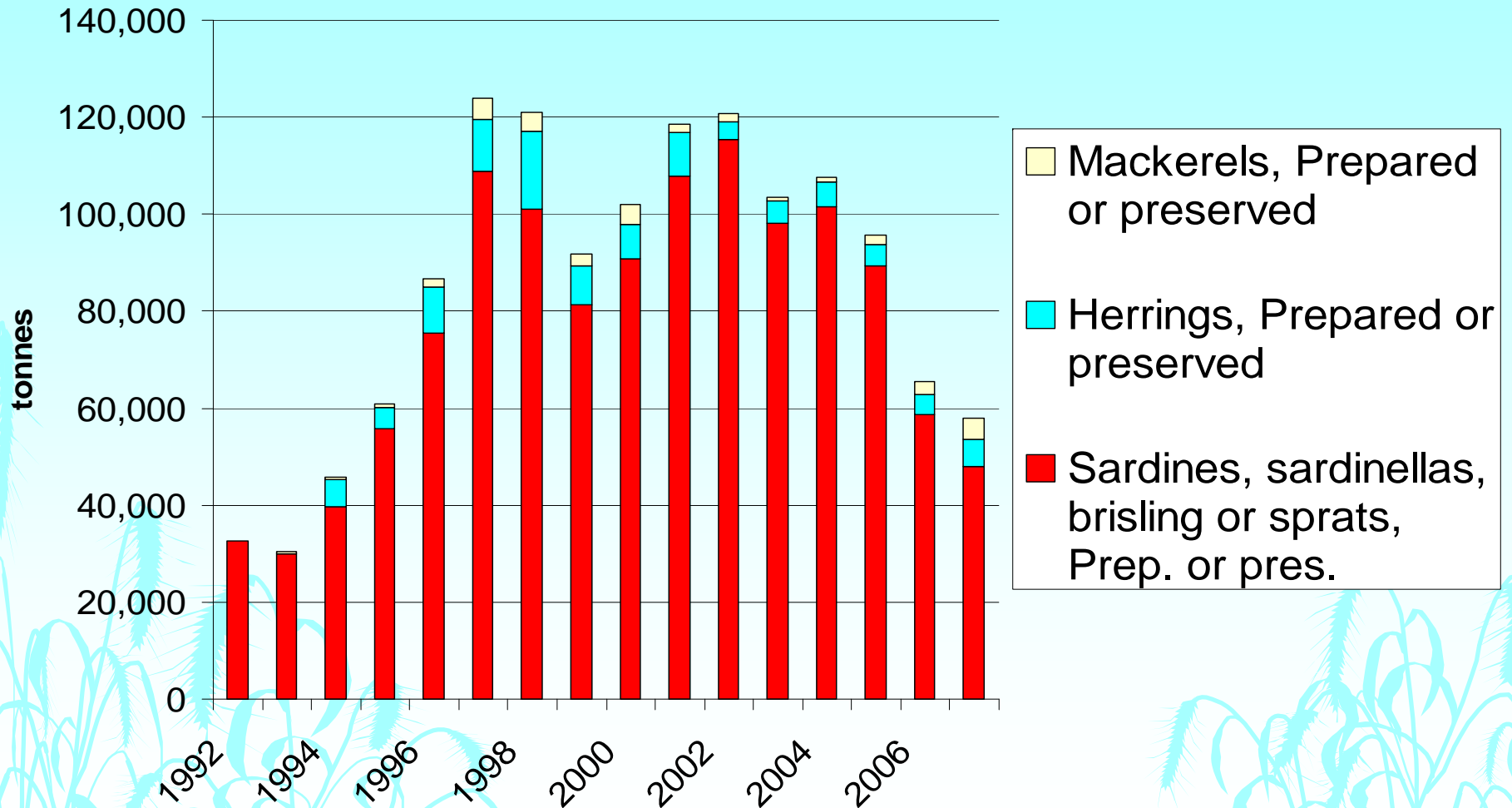


Production of canned fish in Poland

- important sector of industry
- employment growing
- modernization and concentration ongoing
- relative cheap work force, but skilled technological staff
- further concentrations likely



Production of canned fish in Baltic States



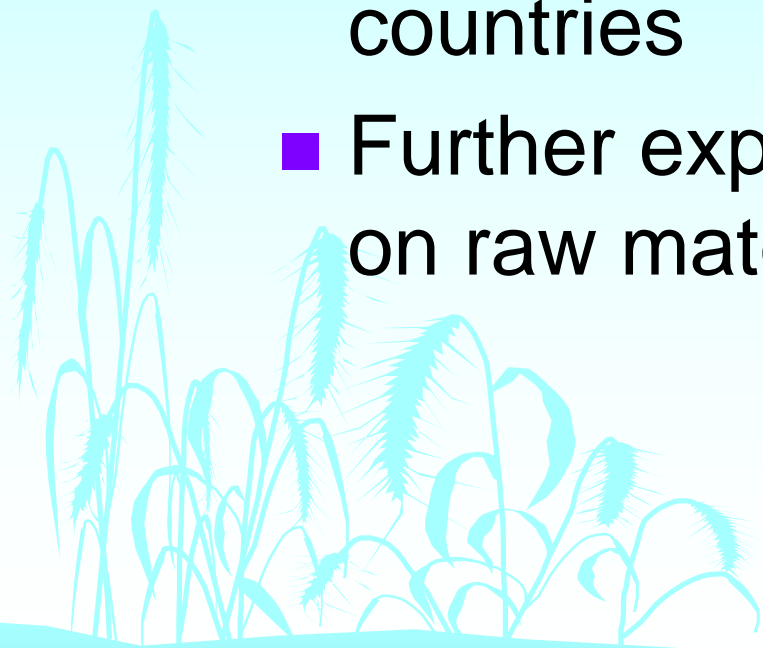
Production of canned fish in Baltic States

- Latvia we will hear more later on
- Lithuania experienced problems with its canning industry
- Estonia also reported lower production in recent years



Findings

- Canning in developed declining, due to higher labour costs
- Concentration in traditional canning countries
- Further expansion of canning depends on raw material supply and on prices



Findings (cont.)

- Canned fish prices stayed very low in the last two decades
- Poland is doing pretty well, as main canned herring supplier to Germany
- Lithuania and Estonia experienced some problems in recent years
- Labour costs in Baltic countries and Poland will be key to any further development

Findings (cont.)

- introduction of new technologies and innovative production methods key for Baltic states and Poland
- Improve the quality and the range of products
- Maintain the level of employment in this sector which is exposed to strong competition and needs a substantial restructuring



Thank you for your attention

