"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES".

Marta Aymerich Cano
Dpto. Comercio, Promoción y Relaciones UE
ANFACO

<u>EUROPEAN UNION</u>

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Production Fish and Shellfish (Year 2007)
- Catch: 5.243.611 TM
- <u>Aquaqulture: 1.302.688 TM</u>
- TOTAL: 6.546.299TM

Fuente: FAO

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- The main species in the EU27 are :

Herring

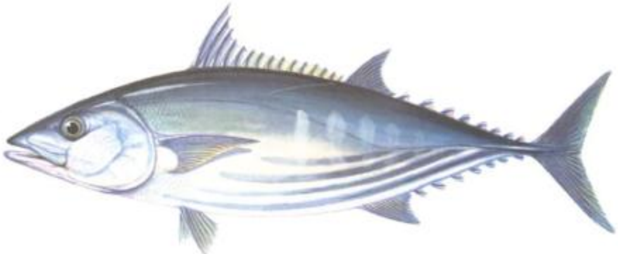
Whiting

Mackerel

Sardine

Molluscs

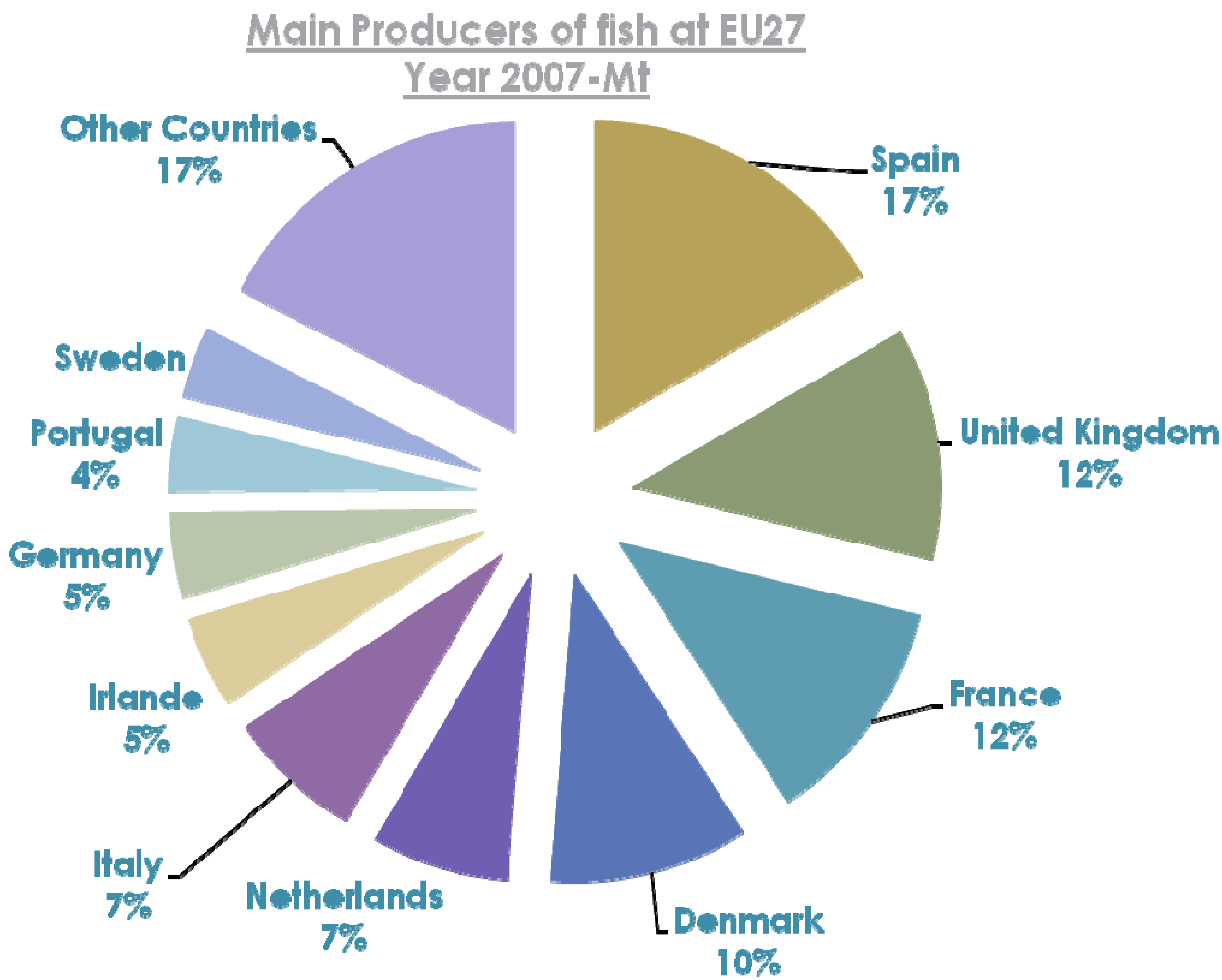
Skipjack



Fuente: FAO

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)



Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

The production of fish and shellfish by EU27 in relation with total of world:

3’85%

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- UE Production of processed fish and shellfish
- (Year 2007): 5.125.524 MT

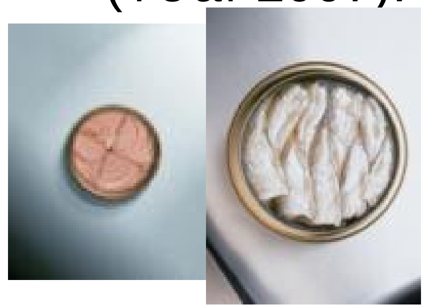
- The EU production represents by the world the

11’2%

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Presentation of the products in the UE 27 (Year 2007):

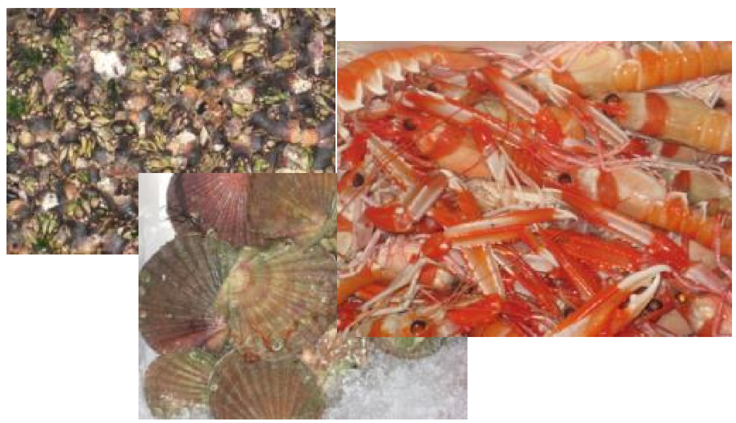
Fish fresh or frozen:
1.987.088 MT



Canned fish
1.600.734 TM

Oils and meals:
429.993TM

Fish dried, salted and smoked:
424.422TM



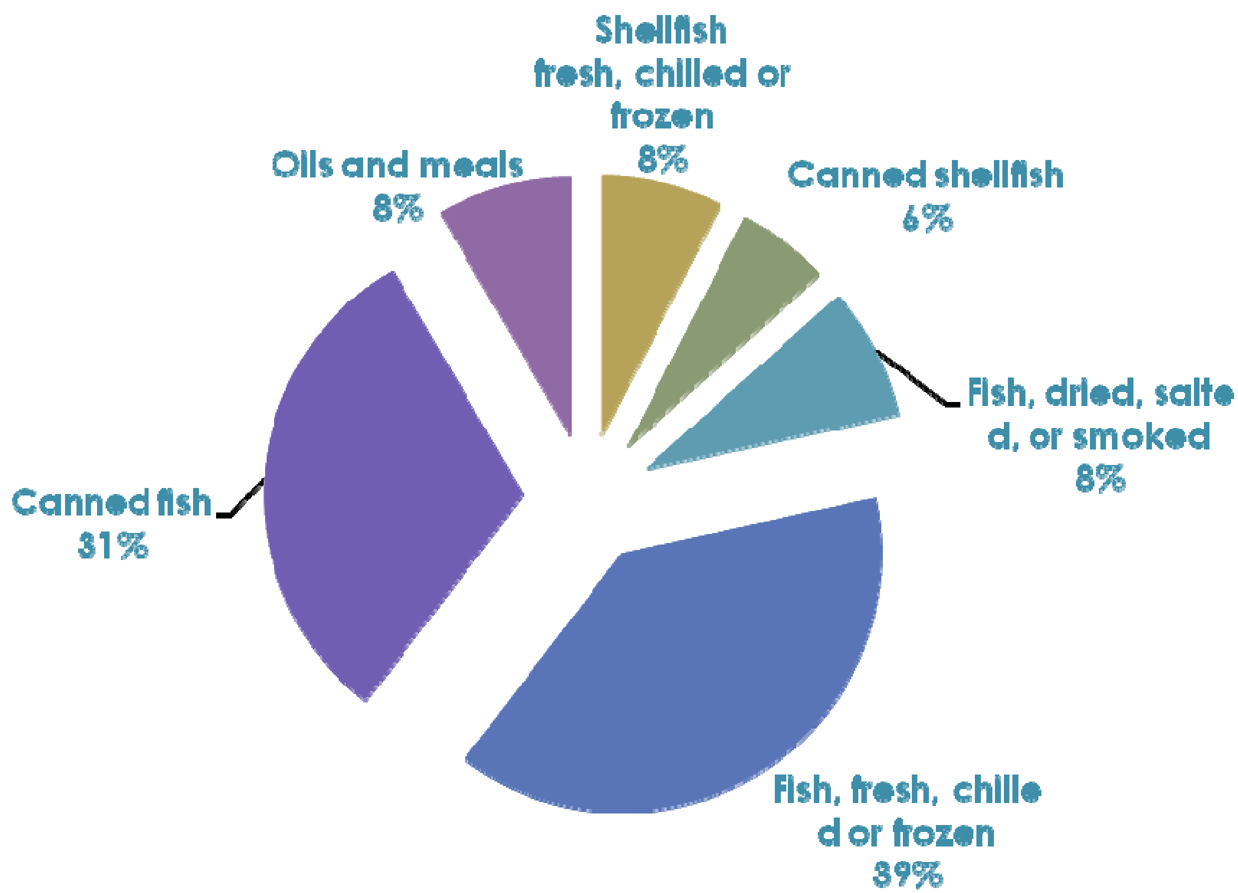
Shellfish fresh or frozen:
384.903 TM

Canned shellfish
298.903 TM

Fuente: FAO

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

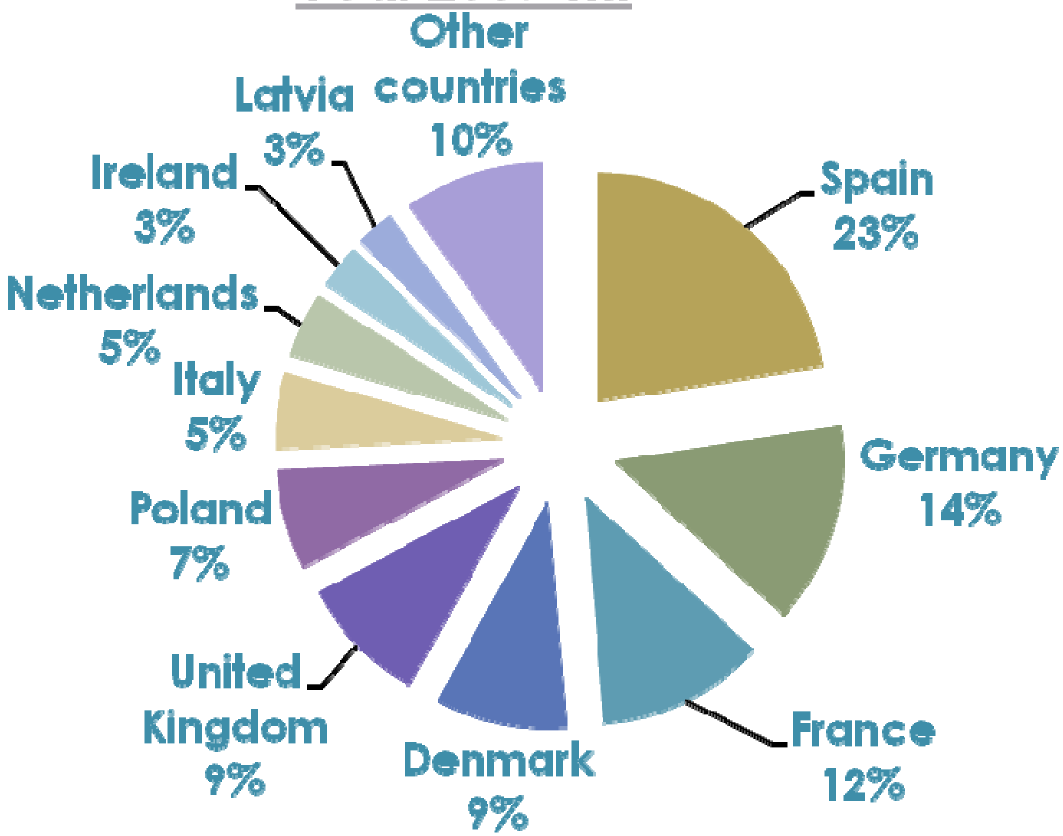
CAST OF THE PRODUCTION OF PROCESSED FISH AND SHELLFISH



"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

Main Producers of processed fish and shellfish at EU27
Year 2007-Mt



"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Exports processed products- Year 2007
  - 6.566.177 MT
  - 24.001.005 Miles $

- Increase from 1990:Volumen 82% Valor: 191%
- Increase from 1980: Volumen: 170 % Valor: 598%

Fuente: FAO

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Main countries exporters of processed fish products by EU27. Year 2007
  - Spain: 942.455 TM
  - Netherlands: 933.255 TM
  - Denmark: 881.914TM
  - Germany: 827.294 TM
  - United Kingdom: 631.633 TM

Fuente: FAO

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Imports processed products- Year 2007
  - 9.740.962 MT
  - 41.489.524 Miles $

- Increase from 1990:Volumen 55% Valor: 165%
- Increase from 1980: Volumen: 155 % Valor: 557%

Fuente: FAO

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Main countries importers of processed fish products by EU27. Year 2007
  - Spain: 1.643.375MT
  - Germany: 1.118.690 MT
  - France : 1.044.308 MT
  - Italy : 973.147 MT
  - United Kingdom: 839.548 MT

Fuente: FAO

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Regarding foreign trade, the EU is a net importer of processed fish, resulting in a coverage rate of exports over imports of only 61%, and with a forecast of rising import requirements of materials premiums.

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Exports are dominated by the EU's own production of packaged or canned fish and other semi-processed products re-exported after repackaged under a European brand.

  The EU has a negative foreign trade balance with respect to the U.S., and positive about Japan. European industry has also gained new market shares in the East.

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Is a very dynamic industry that is undergoing considerable changes at different levels (competition from developing countries, methods of processing, etc.).
- There is a clear trend towards vertical integration in the industry with the creation of new production plants close to capturing the raw material for industry.

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

Apparent consumption in EU-prepared and preserved seafood YEAR 2007

The average consumption of seafood in the EU27 remain around 18 kg / capita / year, where Denmark is the first consumer over 100kg/hab. and the country with lower consumption isEstonia with only 1'58kg / hab

.

	Kg/Capita/Año
Dinamarca	108,09
España	37,52
Lituania	35,77
Portugal	34,66
Letonia	31,09
Malta	23,70
Finlandia	22,33
Francia	21,30
Chipre	20,72
Bélgica	18,86
Italia	17,99
Luxemburgo	15,05
Polonia	14,14
Alemania	13,10
Reino Unido	12,56

	Kg/Capita/Año
Irlanda	10,04
Grecia	9,78
Eslovenia	8,20
Austria	7,87
Países Bajos	5,84
República Checa	5,49
Bulgaria	5,42
Eslovaquia	5,07
Rumania	5,00
Hungría	2,81
Suecia	2,80
Estonia	1,58

Fuente: FAO

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

Main group products by consumption in the EU27:

1º Fish fresh, chilled or frozen :

2º Canned fish

3º Shellfish fresh, chilled or frozen:

Fuente: FAO

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

If we made a reference to preparations and canned products in the 2007

The average consumption of prepared and preserved fish products in the EU is around 4'45 kg / capita / year, where Spain is the first consumer 9kg/hab. and the country with lower consumption is Latvia 0'1kg / hab.

	kg/hab
España	9,10
Estonia	8,89
Malta	8,23
Francia	7,66
Bélgica	6,55
Suecia	5,88
Dinamarca	5,23
Irlanda	5,23
Chipre	5,01
Italia	4,78
Finlandia	4,35
Reino Unido	4,18
Austria	3,87

	kg/hab
Alemania	3,84
Luxemburgo	3,79
Lituania	3,44
Portugal	3,06
Países Bajos	3,04
República Checa	1,74
Eslovenia	1,68
Eslovaquia	1,20
Grecia	1,20
Polonia	1,14
Hungría	0,95
Bulgaria	0,86
Rumania	0,56
Letonia	0,10

Fuente: FAO

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

<u>Major seafood and aquaculture prepared and preserved consumed in the EU</u>

1º Canned tuna

2º Breaded fish preparations

3º Canned sardines

Fuente: FAO

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Spain is ranked 21st worldwide as a producer of fishery products and aquaculture.

- The Spanish fish production is over 1 million of MT, with a coverage rate of 60% causing the need to rely on imports to supply domestic demands

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Spain is the largest producer of fishery products from the EU.
- The Spanish participation in the sector at EU level is much higher than that obtained when considering the food industry as a whole:
  - 18% of total seafood production
  - concentrated just over 20% of community sector employment).

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- The Spanish production represents:
  - 4.2% of the food industry
  - 0.8% of manufacturing value added generated amounted to
  - 3.4% of the food industry
  - 1.1% of manufacturing.
- The total value of fisheries output exceeds 6010 million

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- The Spanish fishing industry generates 175,000 jobs
- This industry employs:
  - 5% of employment in the food industry
  - 0.8% of total manufacturing employment.

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- The business structure of the sector is characterized by the atomization business as one of the features of the sector.

  Now, along with the presence of large number of small-scale enterprises, there are a few large companies dominate the market.

The new products for the consumer preferences

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

Traditionally, the market for prepared and preserved fish products in the EU based its promotion strategies in the

PRICE

At present and due to the global market in which the sector is framed in the EU, its promotion strategies should be based on the

ADDED VALUE

for the different products.

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

As cornerstones for value creation, the community sector of prepared and canned seafood products are focused on:

Tradition and quality

Health

Food

New packs

Other

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Tradition / Quality

In relation to tradition and quality are two main routes delivering value:

-<u>Origen of the Product</u>

Products that deliver value, from a defined origin and appreciated, associated with artisanal fishing methods or traditional, and that bring fresh packaging qualit

Este producto se elabora con pescado fresco de las rías gallegas y sólo en campaña

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

- Tradition / Quality

The other main way of providing added value is :

- Presentation of product

Products with a presentation and method of manufacture, provide an added value

Both the tin and the sardines make this product to be a limited edition

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- HEALTH

In relation to health can make the difference based on products

- WITHOUT
- WITH

- WITHOUT
SALT

- NATURAL

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Health

- WITH

OLIVE OIL EXTRA VIRGEN

OMEGA 3

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

- Health

- LIGHT

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

-Ready Meals

Traditionally canned products has been used as ingredients, mainly for salads and other dishes. Now appear prepared and preserved seafood dish prepared ready to eat.

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

-Packaging

Added value to products based on their packaging, so that their use is becoming increasingly better adapted to the needs of consumers

POLYPROPYLENE

- EASY PEEL

-TETRA
-PACK

- TUBE

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

-Packaging

- POUCH

- CRISTAL

“MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

-OTHERS

Within this latter category would find those products manufactured, where the base value is based on:

-Traditions

Types of food: Italian, Tapas, Asian

Sauces

"MARKET DEVELOPMENT ACCORDING TO CONSUMER PREFERENCES

Asociación Nacional de Fabricantes de CONSERVAS DE PESCADOS Y MARISCOS (ANFACO)

We have to understand that the total value of the various markets will increase as we get consumers to pay more for the product we offer.

Seafood products processed and preserved are one of the sources of animal protein and healthy most appreciated, and we must all convince the consumer that deserves a little more of their spending.

THANK YOU