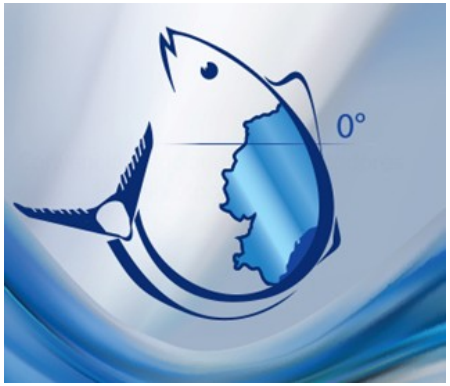


Foro Regional de Sostenibilidad del Atún

Manta, Ecuador, 14 y 15 de Noviembre de 2013

Tendencia Mundial del Mercado del Atún

por
Roland Wiefels

INFOPESCA

www.infopesca.org

INFORME QUINCENAL DE EVOLUCIÓN DE LOS MERCADOS

Argentina • Bélice • Brasil • Colombia • Honduras • México • Nicaragua • Rep. Dominicana • Uruguay • Venezuela

INFOPESCA
NOTICIAS COMERCIALES

Publicado por: INFOPESCA, Casilla de Correo 7086, Julio Herrera y Obes 1296, 11100 Telx: (598) 2 9028701 / Fax:9030501, Montevideo, Uruguay.
Email: infopesca@infopesca.org Web: http://www.infopesca.org

Esta es una publicación de las Organizaciones Intergubernamentales que forman el Sistema Global de Servicios de Información Comercial y Asesoría Técnica para la Comercialización de Productos Pesqueros.

INFOPESCA (A Latina/Caribe)
Montevideo, URUGUAY

INFOFISH (Asia/Pacífico)
1st Floor, Wisma UKM,
Jalan Desaria, Pulau Meranti,
47120 Puchong, Selangor, MALAYSIA
Tel: (603) 80649498 - (603) 80649298
Correo Electrónico: info@infofish.org
Web: www.infofish.org

INFOFECHE (África)
Tour C, 19ème étage
Cité Administrative Abidjan 01, CÔTE d'IVOIRE
Tel: (225) 2022 80 80 Fax: (225) 20 21 80 54
Correo Electrónico: infopeche@aviso.ci

INFOS AMAK (Países Árabes)
71, Boulevard Rahal El Meskini P.O. Box 16 243,
Casablanca, 20 000 MOROCCO
Tel: (212) 522540856; Fax: (212) 522540855.
Correo Electrónico: infosamak@infosamak.org
Web: www.infosamak.org

INFOYU (China)
Room 514, Nanfeng Bldg.96
East Third Ring Road Chaoyang District, Beijing
100122, R.P. CHINA
Tel: (+8610) 5919 9614; Fax: (8610) 5919 5140
Correo Electrónico: infoyu@agri.gov.cn
Web: www.infoyu.net

EUROFISH (Este Europeo)
P.O. Box 0896, H.C. Andersens Boulevard 44-46
DK-1553 Copenhagen V, DENMARK
Tel: (+45) 333777 55; Fax: (+45) 33377756
Correo Electrónico: info@eurofish.dk
Web: www.eurofish.dk

GLOBEFISH (FAO - FIPM)
Viale delle Terme di Caracalla 00153 Rome, ITALIA
Tel: (39-06) 57052692 Fax: (39-06) 57053020
Correo Electrónico: globefish@fao.org
www.globefish.org

El material utilizado en esta publicación se obtiene de fuentes oficiales u otras fuentes consideradas de entera credibilidad, tomándose las medidas pertinentes para asegurarse su veracidad.

Noviembre 05,2013 Nº20/13

INFORMACIÓN GENERAL: Chile: Crecen exportaciones de salmónidos... **Uruguay:** Inauguran Consejo Local de Pesca...**El Salvador:** Tortugas mueren intoxicadas por algas...**Alemania:** Pesquería obtiene certificado...**UE:** No hay subsidios para barcos....**EEUU:** Desembarques pesqueros siguen siendo altos....**Europa:** La CE anunció que habrá cambios en la TAC..

PESCADO CONGELADO: Argentina: Según la Dirección de Economía de la Subsecretaría de Pesca hubo un sensible aumento de las exportaciones del período enero setiembre de 2013 con respecto a año pasado ...**UE:** La Unión Europea habría superado a los EEUU como importador de pangasius...

IV Congreso Brasileño De Acuicultura y Especies Nativas

21 al 23 De Noviembre de 2013,
BELÉM, PARÁ, BRASIL

Hangar Centro De Convenciones
De La Amazonía.

Más Informaciones:
Http://Aquicultura2013.Com.Br/Mensagem-Do-Presidente/
Fuente: Www.Embrapa.Br

Derechos reservados. Reproducción solamente permitida por acuerdo con INFOPESCA

Información General
Eventos
Productos Refrigerados y Vivos
Pescados Congelados
Atún Refrigerado, Congelado
Camarón, Langosta y Cangrejo Congelado EEUU - JAPÓN - EUROPA
Moluscos, Cefalópodos, y Ranas Congelados
Productos Curados, Harina y Aceite - Productos en Conservas

Atún Refrigerado, Congelado

ATÚN REFRIGERADO, CONGELADO Noviembre 05, 2013 (Nº 20)

(*) Precios US$/TM a menos que se indique lo contrario

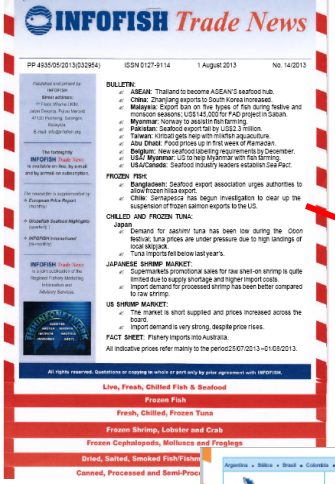
Japón

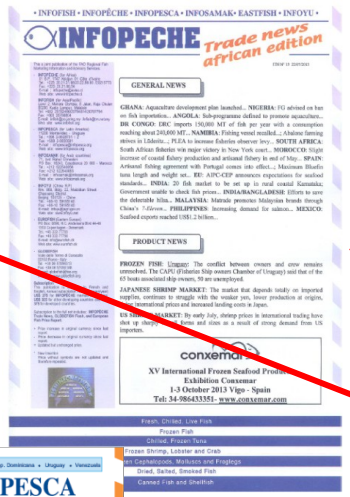
Importaciones de atún: enero-setiembre 2013: La demanda de atún de calidad *sashimi* en Japón siguió bajando con un pronunciado impacto en las importaciones, afectadas por el aumento del costo de importación. Esto trajo como consecuencia que en los primeros nueve meses del año disminuyera un 9% las importaciones de fresco y congelado, incluyendo los lomos (159.825 toneladas frente a 175.428 MT del año pasado). El descenso fue más pronunciado en el atún enterolimpio, mientras que las importaciones de lomo se mantuvieron relativamente estables. El precio promedio ex-bodega del popular ojo grande subió debido a la disminución de la pesca en el Océano Índico y por las capturas menores en el Pacífico Occidental y Central.
Es importante señalar que el gasto hogareño de atún aumentó durante este período por la suba del precio promedio del atún, particularmente la carne roja del popular ojo grande de calidad. Este año, también aumentó un 17% el costo de comer fuera, impactando negativamente en el consumo de productos pesqueros de más valor como el atún. Debido a las altas temperaturas inusuales en Japón, el consumo de atún *sashimi* fue inferior en setiembre. Durante enero-setiembre se importó 17% menos de productos pesqueros.
Tsukiji, el mercado mayorista de productos pesqueros más grande de Japón registró en setiembre una disminución del 5% en el volumen de ventas, pero, un aumento del 6% en los precios, en comparación con el mismo mes del año pasado. El atún fue una de las categorías más importantes de este comercio. En los últimos dos meses, el precio promedio de venta mayorista aumentó 12%/kg.

Mercado de atún fresco/refrigerado para *sashimi*: Debido a las malas condiciones climáticas, la llegada del atún fresco local y del exterior (excepto aleta azul de cultivo mexicano) se redujo. Los tifones que afectaron las costas japonesas en las últimas semanas, disminuyeron la pesca en las aguas costeras, incluyendo al cultivo de atún. En el área de Wakayama, murieron 1000 atunes de aleta azul en las jaulas. La oferta de aleta azul proveniente de México debilitó los precios de todos los tipos de aleta azul en el mercado. Para evitar el período de calma en el mercado, los acuicultores del Mediterráneo planean traer su pescado en diciembre.
De enero a setiembre se registró un récord de bajas importaciones de fresco, con excepción de la oferta de aleta azul de cultivo desde México y Australia.

ESPECIE	FORMA DE PRODUCTO Y CLASIFICACIÓN	PRECIO INDICATIVO EN US$/TM	ÁREA DE MERCADO	ORIGEN
	REFRIGERADO O CONGELADO PARA SASHIMI Y OTROS USOS FRESCOS			
ATÚN Sin especificar	Filetes, fresco	6.01/kg	Mayorista México	México
	Grande NC Mediano NC	Pequeño NC	Mayorista San Pablo	Brasil
BARRILETE *E. pelamis*	Fresco, entero	0.87/KG	Mayorista Río Janeiro	Brasil
	refrigerado/fresco	- TM	Subasta mercado de Tsukiji, Japón	Japón
ALETA AZUL AUSTRAL *Thunnus maccoyii* *De cultivo*	G&G, congelado	8626-37739/TM		Australia
	G&G, refrigerado, vía aérea	2038-44157/TM		Nueva Zelanda
	G&G, refrigerado, vía aérea	20538-23619/TM		Australia
OJO GRANDE *Thunnus obesus*	G&G, refrig.(vía aérea)	13350-25673/TM	Subasta mercado de Tsukiji, Japón	Japón
		20538-25673/TM		Sudáfrica
		30807-35942/TM		EEUU
		10269-13350/TM		Maldivas
		20538-25673/TM		Nueva Zelanda
		7188-12323/TM		Indonesia
		8215-11296/TM		Sri Lanka
		10269-12323/TM		Filipinas
		15404-17457/TM		Australia
		10269-16430/TM		Fiyi
	G&G congelado	7548-24800/TM		Taiwán

ESPECIE	FORMA DE PRODUCTO Y CLASIFICACIÓN	PRECIO INDICATIVO EN US$/TM	ÁREA DE MERCADO	ORIGEN
	REFRIGERADO O CONGELADO PARA SASHIMI Y OTROS USOS FRESCOS			
ALETA AMARILLA *Thunnus albacares*	H&G, refrigerado (vía aérea)		Mayorista Costa Este EEUU	Sudamérica
	Grado 1	7.75-8.00/lb		
	Grado 2+	6.75-7.00/lb		
	Grado 2	3.25-3.75/lb		
	60 lb y +		FOB Costa Este EEUU	EEUU
	Nº 1	7.25-7.50		
	Nº 2+	5.75-6.25		
	Nº 2	3.00-3.50		
	Lomos, sin carne oscura, tratados (CO), corte central, si y s/e, envasados al vacío individual	2-5 lbs 4.75-5.00 5-7 lbs 5.00-5.20 7 lbs y más 5.00-5.20	FOB Costa Atlántica Central, EEUU	
	Postas tratadas (CO) 4 oz/pz 4.50-4.75 6 oz/pz 4.90-5.10	8 oz/pz 4.90-5.10 10 oz/pz 4.90-5.00	Ex bodega costa Este y oeste	
	G&G enfriado (vía aérea)	6161-10269/TM	Subasta merc. de Tsukiji, Japón	Sri Lanka
		14377/TM		Fiji
		12323-22592/TM		Japón
	G&G congelado	7014-9704/TM		
	Eviscerado refrigerado 10 kg y más (Vía aérea)	N C	CFR Amsterdam	Chennai, India
	Primera 8.11	Segunda 2.22	Ex Playa Puntarenas	Costa Rica
PEZ ESPADA *Xiphias gladius*	Entero congelado en altamar	20-30 kg/pz -/TM 30-70 kg/pz 6528/TM 70-100kg/pz 6389/TM	FOB España	España
	H&G, refrigerado (Vía aérea)		Mayorista Costa Este, EEUU	Sudamérica
	100 lb/pz	4.85-5.25/lb		
	50-99 lb/pz	4.75-5.50/lb		
	G&G	11861-15096/TM	Mayorista Tokio Japón	Japón
	Filet, fresco	-		Pacífico Oeste
	Filet Congelado	-/TM		Japón
MARLÍN LISTADO *Makaira sp.*	G&G, refrigerado	8626-9704/TM	Mayorista Tokio Japón	Japón
PEZ ESPADA SEGUNDA *Xiphias gladius*	Entero	1.78/kg	Ex Playa Puntarenas	Costa Rica
MARLÍN ROSADO *Tetrapturus audax*	Entero	1.69/kg		
PEZ VELA *Istiophorus*	Entero	0.98/kg	Ex Playa Puntarenas	





A cada 6 quincenas

1 informe trimestral

World fish markets at a glance

	2011	2012 estim.	2013 f'cast	Change: 2013 over 2012
	million tonnes			%
WORLD BALANCE				
Production	**156.2**	**156.9**	**160.0**	**2.0**
Capture fisheries	93.5	90.6	90.1	-0.6
Aquaculture	62.7	66.3	69.9	5.4
Trade value (exports USD billion)	**128.2**	**129.3**	**132.2**	**2.2**
Trade volume (live weight)	**57.4**	**57.6**	**57.8**	**0.3**
Total utilization	156.2	156.9	160.0	2.0
Food	131.8	135.1	140.4	4.0
Feed	18.3	16.1	15.6	-3.1
Other uses	6.0	5.8	4.0	-30.8
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
Food fish (kg/year)	18.9	19.2	19.7	2.8
From capture fisheries (kg/year)	9.9	9.8	9.9	1.5
From aquaculture (kg/year)	9.0	9.4	9.8	4.3

Totals may not match due to rounding.

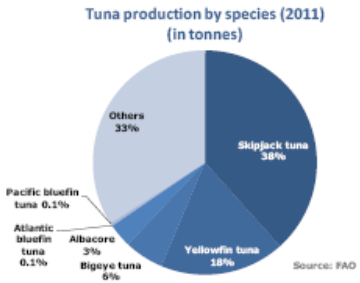
Mercado pesquero mundial

creciente desde 1945

TUNA

Overall 2013 tuna landings lower than last year

Japan, the largest sashimi tuna market, has become less active with lower imports during the first half of the year. The canned tuna market fared better with improved imports by the European Union and the USA. Canned tuna demand has also increased in many non-conventional markets.



In the Western Pacific, the 4-month FAD fishing ban remains in force until 31 October and since the start on 1 July catches have been reduced but the price of frozen skipjack for delivery to Thailand dropped to USD 1 900/tonne in July, which was the lowest since January 2012; it weakened further to USD 1 800/tonne in August and moved up to USD 1 920/tonne (CFR Bangkok) in mid-September.

In the Eastern Pacific tuna supplies to canners in Ecuador have dropped significantly from the coastal and deep-sea fisheries since late July because of adverse weather conditions, coupled with strong currents and colder ocean water temperatures. The IATTC fishing closed period was also in place from 29 July to 28 September and 35% of the fishing fleet was not fishing in that area. The remaining vessels will observe the second closure from 18 November 2013 to 18 January 2014. Skipjack stock volumes are good and Manta prices have levelled off at USD 2 050/tonne ex vessel.

In the Indian Ocean skipjack catches have improved and this has allowed the transhipment price from the Atlantic to drop to EUR 1 500/tonne FOB Seychelles compared with EUR 1 620/tonne recorded in August. Yellowfin volumes have not changed much, resulting in a slightly lower price of EUR 2 260/tonne, FOB Seychelles.

In the Atlantic Ocean, fishing off the African coast also remains favourable; the ex vessel price of skipjack in Abidjan dropped to EUR 1 490/tonne and to EUR 2 400/tonne for yellowfin.

A similar price weakening was seen in Europe. In Spain, skipjack is being traded for EUR 1 630/tonne CFR, quite a substantial drop compared with EUR 1 700/tonne in August. As for yellowfin, prices in Italy are stable at EUR 2 600-2 650/tonne CFR, but Spanish prices have contracted sharply to EUR 2 450 CFR/tonne.

Japan

During the first half of the year, tuna landings in Japan posted a slight rise of 1.4% as a result of a significant increase in coastal landings of fresh bluefin and skipjack.

In August, there were unusually large landings of small sized bluefin (20-30 kg/per piece) on the Pacific Ocean side of Hokkaido, which were a result of an unexpected warmwater current in that region.

Landings
Tuna: Japan

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Bluefin						
Fresh	1.9	0.6	0.6	1.1	0.6	1.0
Frozen	0.3	0.0	0.5	0.3	0.3	0.2
Albacore						
Fresh	23.9	26.6	20.8	23.4	30.3	28.0
Frozen	1.8	6.5	3.4	4.4	10.2	11.4
Bigeye						
Fresh	3.3	3.0	1.6	1.4	1.6	1.3
Frozen	11.0	9.1	8.1	8.7	10.9	12.3
Yellowfin						
Fresh	4.8	4.7	4.6	3.6	3.1	3.3
Frozen	4.7	3.2	2.5	3.2	17.3	8.5
Skipjack						
Fresh	20.4	20.7	19.6	20.8	16.3	28.6
Frozen	114.8	106.8	101.7	101.2	102.9	101.8
Total						
Fresh	64.4	58.6	47.3	50.3	51.9	62.3
Frozen	132.5	124.7	116.2	117.8	141.7	134.1
Grand Total	196.9	183.3	163.5	168.0	193.7	196.4

Source: INFOFISH

Demand for fresh chilled sashimi tuna has weakened on the Japanese market. Generally demand for sashimi tuna improves from beginning of autumn but this year sales were still down as a result of the warm weather, which is not favourable for raw fish consumption. Tuna prices, however, remain firm while supplies of air-flown tuna were low because of bad weather conditions in local and foreign fishing grounds during August and September. Recently one of the large department stores in Japan started to promote the sale of MEL Japan (Marine Eco-label Japan) certified local skipjack through its outlets.

In the second half of 2013, the seasonal catches for *somma* or pike mackerel began to appear on the market; this is a competitor for fresh tuna in autumn.

In contrast to sashimi tuna, retail demand for red meat quality bigeye tuna remains high for Western Pacific origin fish because the quality is good. Lower quality tuna of Indian Ocean origin (caught off Somalia last year) is less popular in spite of lower prices and the market is showing a preference for better quality products. This year, supplies of frozen bigeye tuna are expected to be lower than last year and prices are already on the rise.

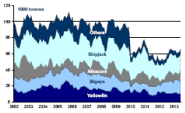
Kaiten sushi restaurant operators, however, remain loyal to Mexican and Australian bluefin tuna.

During the first half of the year, overall tuna imports (excluding canned tuna) remained below last year's level in Japan. Imports of fresh and frozen tuna, including loins, totalled 113 162 tonnes compared with 129 410 tonnes imported in the same period in 2012.

Notably, imports of all types of frozen tuna, except albacore, remained below last year's level during the January to June period in 2013. Supply shortfall for frozen skipjack was particularly high at -47%.

Despite the weakening yen, imports of red meat quality frozen tuna loins were stable during the first half of the year. Supplies during this period increased from the Republic of Korea and China but dropped significantly

Coldstorage holdings
Tuna: Japan



Source: INFOFISH Trade News

Imports
Frozen tuna: Japan

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Yellowfin	27.0	22.9	24.8	22.7	28.3	20.2
Bigeye	46.0	39.6	41.6	32.1	42.2	41.2
Skipjack	16.9	32	32.5	20.4	15.8	8.5
S. bluefin	0.0	1.0	1.2	0.6	0.6	0.7
Albacore	1.9	2.1	7.5	9.4	5.9	7.3
N. Bluefin	3.9	3.7	0.9	1.6	3.2	1.4
Total	94.7	102.3	108.6	86.7	96.2	79.8

Source: INFOFISH

Imports
Freshchilled tuna: Japan

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Yellowfin	8.0	8.3	7.9	7.6	6.6	6.1
Bigeye	7.5	7.8	5.8	5.6	6.6	5.6
Bluefin	1.9	2.8	2.2	1.2	1.6	2.2
S. bluefin	0.6	1.4	0.6	0.6	0.7	0.3

from Fiji and also from Indonesia. Viet Nam was the only source that increased supply from Southeast Asia. From south Asia, India appeared as a new source of supplies (although the quantity is still small), whereas frozen loin supply from Sri Lanka was down. Imports of frozen bluefin loins increased during the first half of the year, as more whole fish are being processed into frozen loin for longer shelf life.

USA

There was a marginal decline in air-flown fresh tuna imports during the first half of the year although the import value increased from USD 107 million to USD 110 million, which could be linked with increased imports of high value Pacific bluefin tuna. Total imports of non-

recipes using Bumble Bee's canned products, including tuna.

Meanwhile the National Oceanic and Atmospheric Administration (NOAA) approved the new Dolphin Protection Consumer Act that came into effect on 13 July this year. The ruling includes a period of education and outreach to provide the fishing industry with additional guidance on enforcement up to 1 January 2014. NOAA said the new act is compliant with a WTO ruling and it requires that any canned tuna sold in the US with a Dolphin-Safe label must have a certification that no dolphins were killed or seriously injured in the process, no matter what gear type was used or where the tuna was caught.

Europe

On the whole consumer sentiment has improved and retailers have reported better sales of canned tuna in recent months. Innovative products and promotions were undertaken by major packers, and these, coupled with the growing popularity of private (supermarket) brands, have contributed to increasing imports. For the first 4 months of the year, canned tuna imports into the EU-27 (external) posted positive growth of 13.6% in volume and 31.8% in value on a year on year basis, amounting to 197 162 tonnes worth USD 1.14 billion.

Canned tuna shipments to selected European major markets also increased significantly except to Italy, which posted negative growth of almost 8% for the January to June 2013 period compared with the same period last year. Italy imported less from Spain (-19.1%), its largest supplier, but shipments from Seychelles increased sharply (+48.4%) indicating that buyers opted for cheaper alternatives.

Germany imported more canned tuna this year (+14.6%) with more supplies reported from Ecuador (+82%) and Thailand (+73.3%). Ecuador overtook the Philippines as the number one supplier as supplies from

CFR Prices
Canned tuna*: USA, EUROPE

* 48x6.5 oz Europe, 48x6 oz USA, chunk, origin Thailand
Source: GLOBEFISH

Imports
Canned tuna: France

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Côte d'Ivoire	16.0	11.7	10.0	8.1	10.8	12.9
Seychelles	7.9	6.6	6.5	9.5	12.0	12.5
Spain	10.6	10.0	11.1	16.7	8.9	10.5
Ecuador	4.3	7.2	6.6	7.4	5.8	7.6
Thailand	3.0	4.0	4.6	5.2	3.9	4.4
Madagascar	4.4	5.1	1.7	5.0	3.7	3.3
Mauritius	0.6	0.4	0.8	1.1	2.2	2.7
Ghana	2.2	3.2	3.6	4.3	3.0	2.2
Others	6.0	7.5	4.7			
Total	55.5	55.8	49.8			

Source: Direction Nationale des Statist Ministère – DNSCE

Imports
Canned tuna: Germany

	Jan-	Jan-
	2009	2010
	(1 000 t	
Ecuador	15.2	8.2
Philippines	7.4	10.1
Papua NG	0.7	2.0
Netherlands	0.2	1.9
Thailand	3.6	2.1
Indonesia	3.1	3.6
Seychelles	3.9	0.6
Others	4.2	4.7
Total	38.3	33.1

Source: Germany Customs

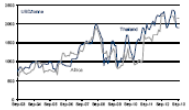
Taking advantage of the EU duty free import quota for pre-cooked tuna loins, Spain imported more from Asia this year, particularly from China (+212.5%) and Thailand (+114.3%). Nevertheless Ecuador remained the largest supplier of pre-cooked tuna loins to Spain, though shipment from this source dropped slightly (-1.8%) this year. Ecuador, however, managed to supply more (+20%) pre-cooked tuna loins to Italy.

Asia

Asian canned tuna producing countries are hopeful that they will get better market access to the EU markets next year. The Philippines is expecting to receive preferential treatment for its canned tuna exports to the EU under the enhanced Generalized System of Preferences or GSP Plus program to be implemented from 1 January 2014 while Thailand has resumed its free trade agreement negotiation with the EU. To support the negotiation, 130 Thai companies including Thai Union Frozen Products (TUF) recently signed a memorandum of understanding to adopt the International Labour Organization's Good Labour Practices (GLP) program. Many accusations have been targeted at the Thai tuna industry, especially from Spain, which has continually accused Thailand of labour violations and poor working conditions.

With better demand from some major markets Thai canned tuna exports maintained a positive trend and grew marginally by 1.4% in quantity during the first semester of this year against the same period of 2012. In value terms, however, the exports were more or less stagnant. Shipments to Egypt, the number one destination in the Middle East, dropped by almost half. Similar trends were recorded in exports to Libya (-12.9%), Papua New Guinea (-27.3%), Italy (-83.9%), South Africa (-15.5%), UAE (-27.3%) and to the largest market USA (-3.4%). Higher shipments to other markets, however, managed to offset the declines as exports to some European and Latin American markets increased significantly, for example to

CFR Prices
Frozen Skipjack: Thailand and Africa



Source: ITN

Imports
Fresh Tuna: USA

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Yellowfin	8.7	7.6	8.1	8.3	8.3	8.0
Bigeye	3.0	2.7	2.6	1.6	2.0	2.0
Albacore	0.3	0.4	0.2	0.3	0.4	0.4
Bluefin	0.2	0.2	0.3	0.2	0.2	0.1
Skipjack	0.0	0.0	0.0	0.0	0.0	0.0
Others	0.2	0.1	0.2	0.2	0.2	0.3
Total	12.4	11.0	11.3	10.5	11.1	11.0

Source: NMFS

Imports
Tuna loins: USA

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Thailand	8.0	4.7	13.2	14.2	8.6	13.3
Fiji	5.2	5.8	6.3	4.2	4.0	5.7
China	0.2	0.0	0.0	3.0	5.6	5.2
Mauritius	3.5	3.4	2.3	3.4	2.9	4.7
Ecuador	0.3	0.0	0.1	0.0	1.3	0.7
Tri & Tob	5.1	5.1	4.2	3.2	0.0	0.0
Others	1.1	2.3	7.3	4.9	5.2	6.0
Total	23.4	21.3	33.3	31.9	30.8	35.6

Source: NMFS

Demand for fresh chilled sashimi tuna remained stable in the USA, which is now the second largest market for non-canned tuna products.

Canned tuna: positive trends continue in major markets

The lower price of USD 2 000/tonne CFR Bangkok, at which skipjack has been traded since early July, has softened canned tuna prices by 2-5% in recent weeks. Demand for canned tuna in European and USA markets continues to improve. Packers in Asia reported better sales in the second quarter of 2013 as customers used up low-priced inventories.

USA

The confidence of US consumers has improved slightly as a result of positive economic indications and there are signs of willingness to spend more on products that meet changing tastes and provide value for money. To revive demand for canned tuna major tuna packers

Imports
Tuna pouches: USA

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Thailand	10.6	11.5	11.7	8.8	9.8	10.3
Ecuador	6.6	5.2	6.5	5.8	5.5	7.0
Others	2.8	2.8	4.0	5.3	2.4	1.7
Total	20.0	19.5	22.2	19.7	17.7	19.0

Source: NMFS

Imports
Canned tuna (excl. pouches): USA

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Thailand	32.8	35.7	38.0	51.5	32.9	43.7
Vietnam	8.5	7.1	11.5	12.0	10.8	12.4
Philippines	16.2	14.8	11.1	14.1	11.8	9.1
China	2.1	3.4	2.8	4.1	4.3	5.8
Indonesia	6.0	7.7	8.3	8.3	4.8	5.0
Others	8.0	3.4	3.5	8.7	4.4	3.8
Total	74.6	73.1	83.2	98.6	68.8	77.8

Source: NMFS

are engaging in promoting canned tuna products as well as introducing new premium and convenience products.

As an indication of recovering domestic demand, canned tuna imports into the USA continued to show strong growth this year. During the first six months of 2013 imports of canned (and pouch) tuna grew by 12.2% in volume and 17.8% in value against the same period of last year. Significant growth was recorded for imports of popular light meat tuna in brine (+21.1%) and also more expensive poached tuna (+7.8%). Thailand remained the largest supplier and has shipped almost 54 000 tonnes so far this year, up 26.7%. Almost 83% of the total canned tuna imported into the USA came from ASEAN countries and shipments from this group increased by around 12% this year.

Suppliers are also generally more optimistic about the USA market this year. Chicken of the Sea International (COS), expects revenue growth of 8% and volume growth of 3% this year. Its competitor, StarKist recently launched a newly branded "Made in America" canned Chunk Light Tuna in Water, and Chunk Light Tuna in Oil, prepared and packaged in American Samoa. Bumble Bee has released the autumn edition of its BeeWell for Life ebook – these are aimed at providing seasonally appropriate fitness tips and encouraging healthy living, as well as containing

Globefish 3

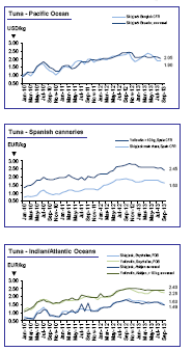
Imports
Canned tuna: Italy

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Spain	22.6	21.0	21.6	25.1	23.2	18.8
Seychelles	2.6	3.0	3.1	2.7	3.1	4.8
Côte d'Ivoire	4.0	5.4	2.9	2.2	4.6	3.7
Colombia	5.1	4.2	5.3	5.6	4.7	3.5
Ecuador	1.0	1.6	3.0	2.3	1.8	3.1
Portugal	1.0	0.8	0.5	0.8	1.0	1.1
Mauritius	1.5	1.2	1.6	1.5	1.2	1.0
Thailand	1.5	1.2	1.6	1.5	1.2	1.0
France	3.4	3.6	0.3	1.0	0.5	0.1
Others	2.1	2.3	1.6	2.1	3.1	4.0
Total	44.8	44.3	41.4	44.8	44.4	45.5

Source: ISTAT

Imports
Tuna loins: Italy

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Ecuador	5.0	7.3	5.1	5.5	5.0	6.0
Thailand	3.2	5.4	4.4	3.2	4.8	2.7
China	0.4	2.2	2.2	2.3	1.5	1.6
[illegible]	[illegible]	[illegible]	[illegible]	1.0	1.6	1.3
[illegible]	[illegible]	[illegible]	[illegible]	2.2	0.7	1.5
[illegible]	[illegible]	[illegible]	[illegible]	4.7	5.3	4.1
[illegible]	[illegible]	[illegible]	[illegible]	19.6	18.9	18.1



Exports
Canned tuna: Thailand

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
USA	43.7	46.1	59.8	53.3	37.2	36.0
Australia	16.7	15.3	20.0	23.6	16.0	15.9
Japan	12.8	12.9	11.8	14.8	13.5	14.5
Libya	16.1	15.5	11.1	4.2	15.8	13.8
Canada	14.8	16.3	14.4	16.9	12.8	13.2
Egypt	21.7	14.1	25.2	21.9	20.1	10.3
Saudi Arabia	10.5	7.1	12.0	10.2	10.9	9.1
UK	8.2	9.7	6.2	16.0	2.3	6.1
Tunisia	*	*	*	*	5.8	5.4
South Africa	5.0	5.8	4.9	4.6	5.4	4.6
Others	95.4	67.5	106.9	104.6	63.4	77.1
Total	246.9	212.1	274.7	276.1	203.2	206.0

* included under "others" Source: Thai Customs

the UK (+159.4%), Germany (+83.9%), France (+62.3%), Argentina (+19.5%) and Chile (+68.5%). Surprisingly exports to Syria were also significantly up by 193.4%.

In the domestic market TUF reported that canned fish demand in Thailand was flat in the second half of last year compared with an average annual growth of 3-5% in recent years. In 2012, the overall market value of Thai canned fish was THB 6.2 billion (USD 207 million).

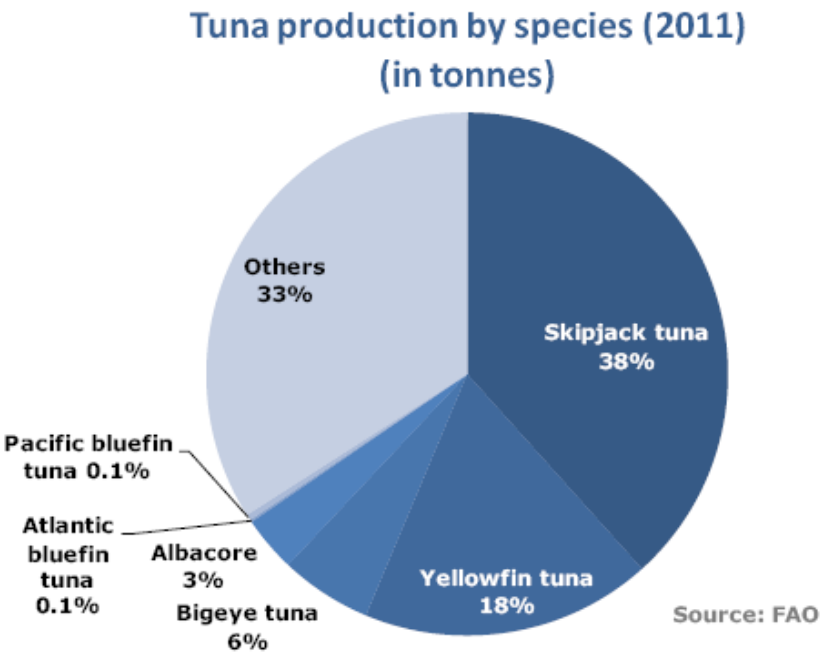
In China, the tuna canning industry is growing, particularly in Zhoushan and Ningbo cities. In Zhoushan there are 15 companies processing tuna with an installed capacity of around 25 000 tonnes raw material a year, Ahuna.com reports.

Canned tuna prices in Japan for locally produced products increased by 9.3% as a result of increased production costs and the weaker yen. The value of imported products also increased (+18%) on a year on year basis in the January to June period, despite a 1.7% shortfall in the imported volume. Thailand had a 70% share in this supply.

Outlook

This year supplies of sashimi quality frozen bigeye tuna are expected to be lower than last year's and firmer price levels are forecast.

Canned tuna sales in Europe and the USA are expected to continue on a positive trend in the third quarter because of improved consumer's confidence and better sales during summer. Canned tuna prices, however, will remain high as the skipjack price is predicted to rebound to above USD 2 000 towards the end of the year.



Tendencias de las demandas de los mercados de atún en 2013

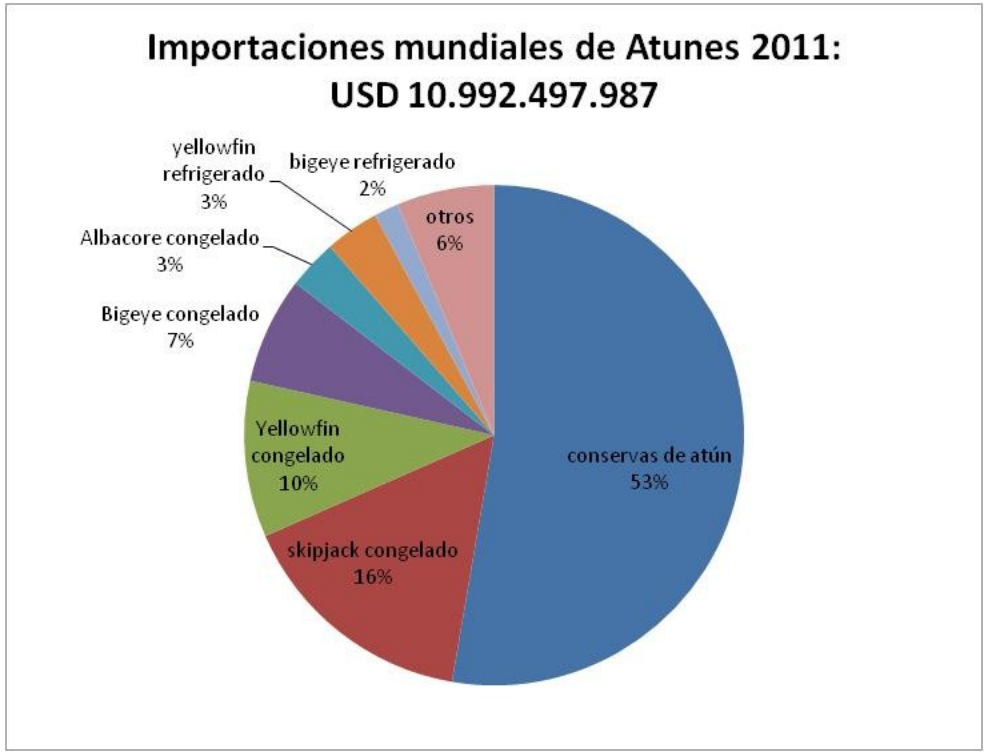
Capturas totales de atún en 2013 menores que en 2012

Mercado japonés para sashimi ↘

Mercado US para enlatados ↗

Mercado Europeo para enlatados ↗

Mercados no-convencionales para enlatados ↗



Fuente: INFOPESCA *basado en*

10 principales exportadores mundiales de atunes (en USD)

	2007	2008	2009	2010	2011	2012
Thailand	1.545.926.006	2.013.866.843	1.729.311.380	1.912.314.645	2.322.493.316	2.751.132.947
Spain	740.558.733	913.152.790	723.933.704	724.003.881	1.053.924.678	1.177.204.273
Taiwan	561.545.276	825.652.589	582.505.837	744.820.539	923.540.350	1.159.339.700
Ecuador	391.361.837	516.973.675	386.783.239	379.203.478	631.357.723	866.653.319
Indonesia	304.348.125	347.189.038	352.312.298	383.256.607	498.635.036	702.364.814
South Korea	266.243.395	270.503.037	288.320.017	353.229.840	376.584.897	590.972.079
China	91.245.495	136.115.913	125.049.833	233.735.477	409.503.467	498.689.930
Philippines	204.374.571	377.809.051	326.941.447	335.080.379	292.411.469	411.335.377
Mauritius	199.366.108	209.440.540	205.846.525	246.128.014	265.662.689	340.118.175
France	252.729.743	372.681.081	209.672.678	165.863.875	186.137.278	259.826.305

Estos 10 países representan el 77% (en 2011) del total de exportaciones de 83 países

10 principales importadores mundiales de atunes (en USD)

	2007	2008	2009	2010	2011	2012
Japan	1.562.088.069	1.710.855.085	1.631.566.883	1.726.100.399	1.938.697.762	2.697.457.876
Thailand	1.053.863.675	1.489.437.923	1.081.201.626	1.189.436.459	1.518.840.679	1.807.447.315
United States	925.261.272	1.069.721.744	970.968.774	1.111.893.836	1.213.690.921	1.724.151.407
Spain	662.782.396	775.966.217	704.823.328	715.787.294	891.381.047	1.042.397.562
Italy	689.485.204	797.542.541	729.813.292	670.878.054	829.830.137	890.364.233
France	520.491.932	609.878.724	576.642.285	499.306.417	630.092.228	655.458.713
United Kingdom	420.704.633	584.391.230	428.855.992	380.282.401	471.592.793	550.196.017
Germany	280.059.685	339.601.013	267.257.664	230.213.497	298.757.081	351.764.271
Costa Rica	26.752.276	38.806.254	29.900.775	18.374.789	30.844.060	278.168.395
Australia	127.749.352	179.965.432	145.179.566	166.427.254	206.838.269	251.162.535

Estos 10 países representan el 73% (en 2011) del total de importaciones de 85 países

Fuente: INFOPESCA ***basado en***

Conservas de Atún

BACHI
Atún
en aceite de girasol
Atum em óleo de girassol
Tuna in sunflower oil
Tonno all'olio di girasole
Thunfisch in Sonnenblumenöl
Thon à l'huile de tournesol
1000g
970g

SoloStocks
CAMPOS
atún
en aceite de girasol
TONNO ALL'OLIO DI GIRASOLE
TUNA IN SUNFLOWER OIL
Alto contenido en proteínas-High protein content.

MIGAS DE BONITO
DEL NORTE EN ACEITE DE OLIVA
Conservas
Emilia
ARTESANAL
Santoña

Montey
ATÚN
EN ACEITE DE GIRASOLE
1.000 g
TUNA
THON
ATUM

olamir
ATÚN
EN ACEITE DE GIRASOL
7.000 g

Mercado Europeo

Imports
Canned tuna: France

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Côte d'Ivoire	16.0	11.7	10.0	6.1	10.8	12.9
Seychelles	7.9	6.6	6.5	9.5	12.0	12.5
Spain	10.6	10.0	11.1	16.7	8.9	10.5
Ecuador	4.3	7.2	6.6	7.4	5.8	7.6
Thailand	3.0	4.8	4.6	5.2	2.9	4.4
Madagascar	4.4	5.1	1.7	5.0	3.7	3.3
Mauritius	0.6	0.4	0.8	1.1	2.2	2.7
Ghana	2.2	3.2	3.8	4.3	3.0	2.2
Others	6.6	7.5	4.7	3.6	2.5	3.2
Total	**55.5**	**56.5**	**49.8**	**58.9**	**51.9**	**59.3**

Source: Direction Nationale des Statistiques du Commerce Extérieur – DNSCE

Imports
Canned tuna: Italy

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Spain	22.6	21.0	21.6	25.1	23.2	18.8
Seychelles	2.6	3.0	3.1	2.7	3.1	4.6
Côte d'Ivoire	4.0	5.4	2.9	2.2	4.6	3.7
Colombia	5.1	4.2	5.3	5.6	4.7	3.5
Ecuador	1.0	1.6	3.0	2.3	1.8	3.1
Portugal	1.0	0.8	0.5	0.8	1.0	1.1
Mauritius	1.5	1.2	1.6	1.5	1.2	1.0
Thailand	1.5	1.2	1.6	1.5	1.2	1.0
France	3.4	3.6	0.3	1.0	0.5	0.1
Others	2.1	2.3	1.6	2.1	3.1	4.0
Total	**44.8**	**44.3**	**41.4**	**44.8**	**44.4**	**40.9**

Source: ISTAT

Imports
Canned tuna: Germany

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Ecuador	15.2	8.2	5.0	5.1	3.9	7.1
Philippines	7.4	10.1	7.7	8.6	7.7	6.5
Papua NG	0.7	2.0	5.6	4.7	5.9	4.7
Netherlands	0.2	1.9	2.4	3.6	2.9	2.7
Thailand	3.6	2.1	2.4	1.9	1.5	2.6
Indonesia	3.1	3.6	3.1	4.2	3.1	2.0
Seychelles	3.9	0.6	1.9	1.0	0.1	0.3
Others	4.2	4.7	3.7	7.0	7.3	11.1
Total	**38.3**	**33.1**	**31.8**	**36.1**	**32.3**	**37.0**

Source: Germany Customs

Fuente: GLOBEFISH

Mercado de los Estados Unidos

Imports
Canned tuna (excl. pouches): USA

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Thailand	32.8	36.7	56.0	51.5	32.9	43.7
Viet Nam	8.5	7.1	11.5	12.0	10.5	10.4
Philippines	16.2	14.8	11.1	14.1	11.8	9.1
China	2.1	3.4	2.8	4.1	4.3	5.6
Indonesia	9.0	7.7	8.3	6.3	4.9	5.0
Others	6.0	3.4	3.5	5.7	4.4	3.8
Total	**74.6**	**73.1**	**93.2**	**93.6**	**68.8**	**77.6**

Source: NFMS

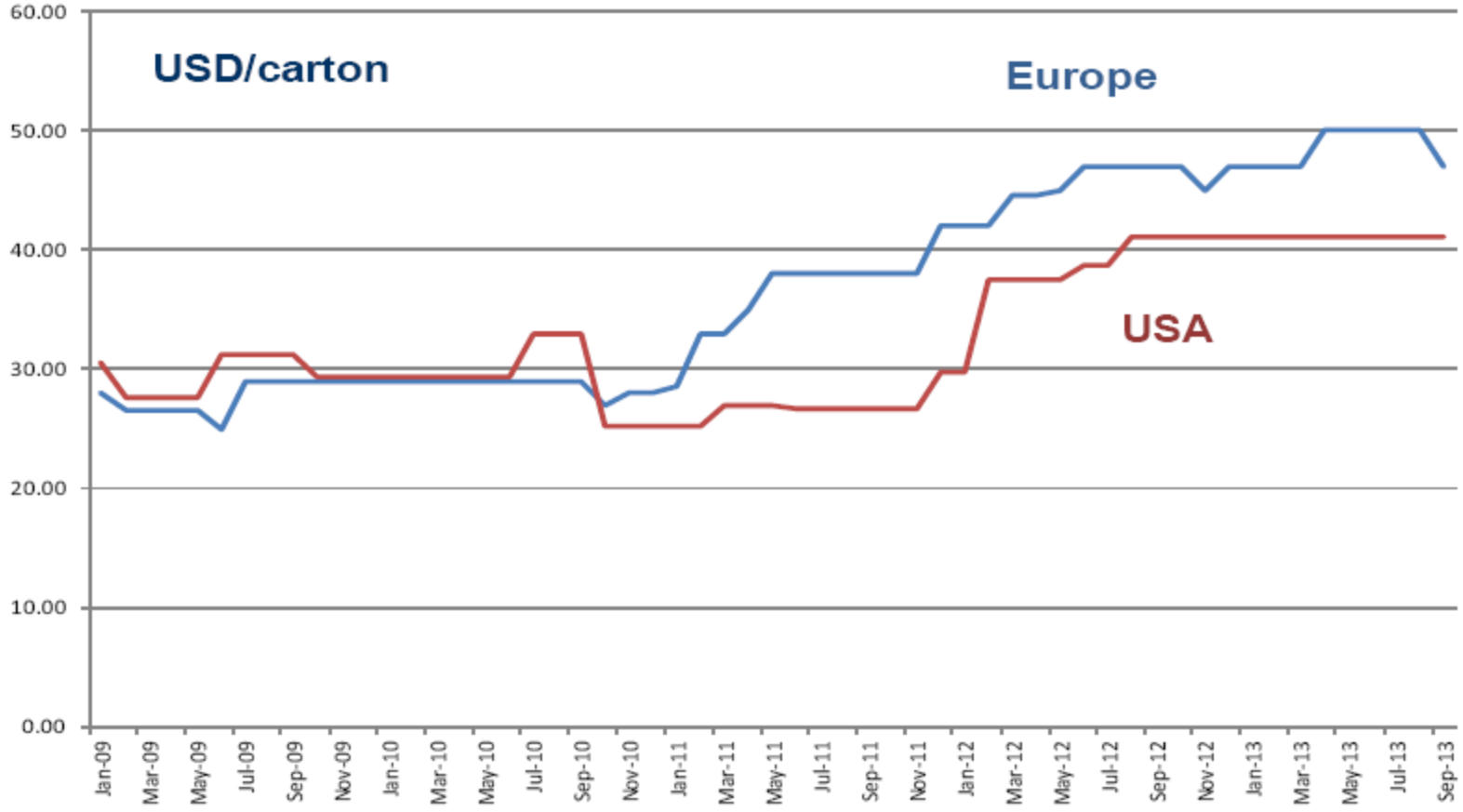
Imports
Tuna pouches: USA

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Thailand	10.8	11.5	11.7	9.6	9.6	10.3
Ecuador	6.6	5.2	6.5	5.8	5.5	7.0
Others	2.6	2.8	4.0	3.3	2.4	1.7
Total	**20.0**	**19.5**	**22.2**	**18.7**	**17.5**	**19.0**

Source: NFMS

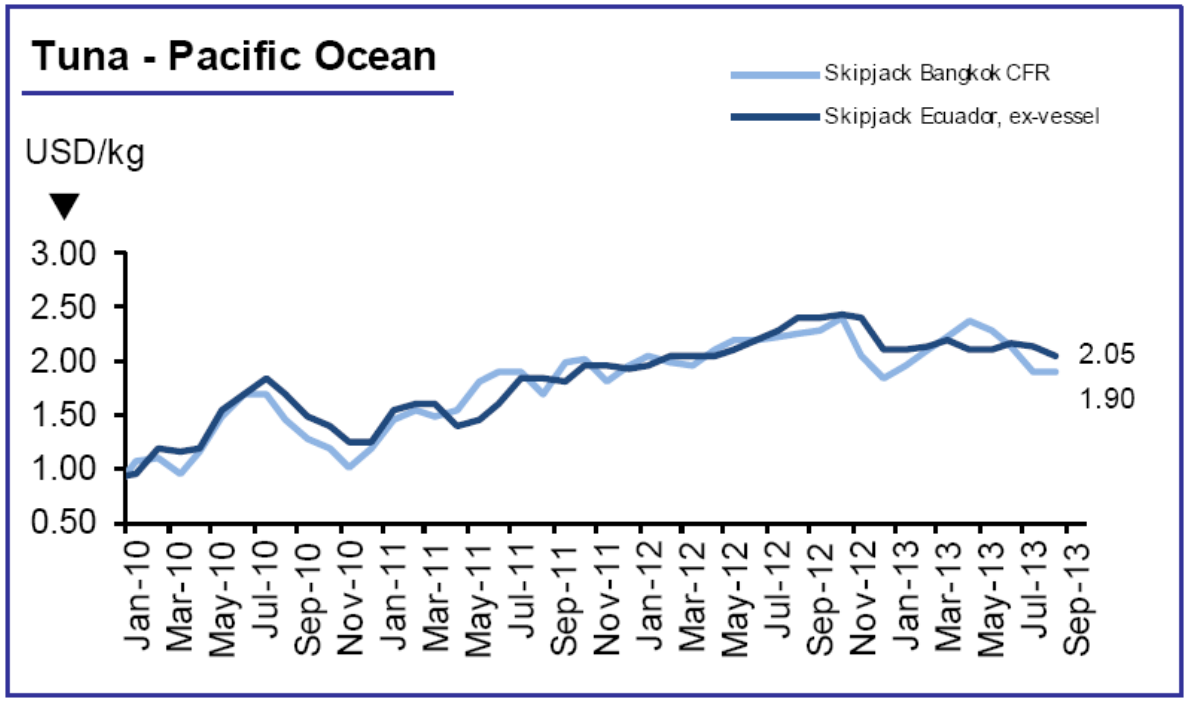
Fuente: GLOBEFISH

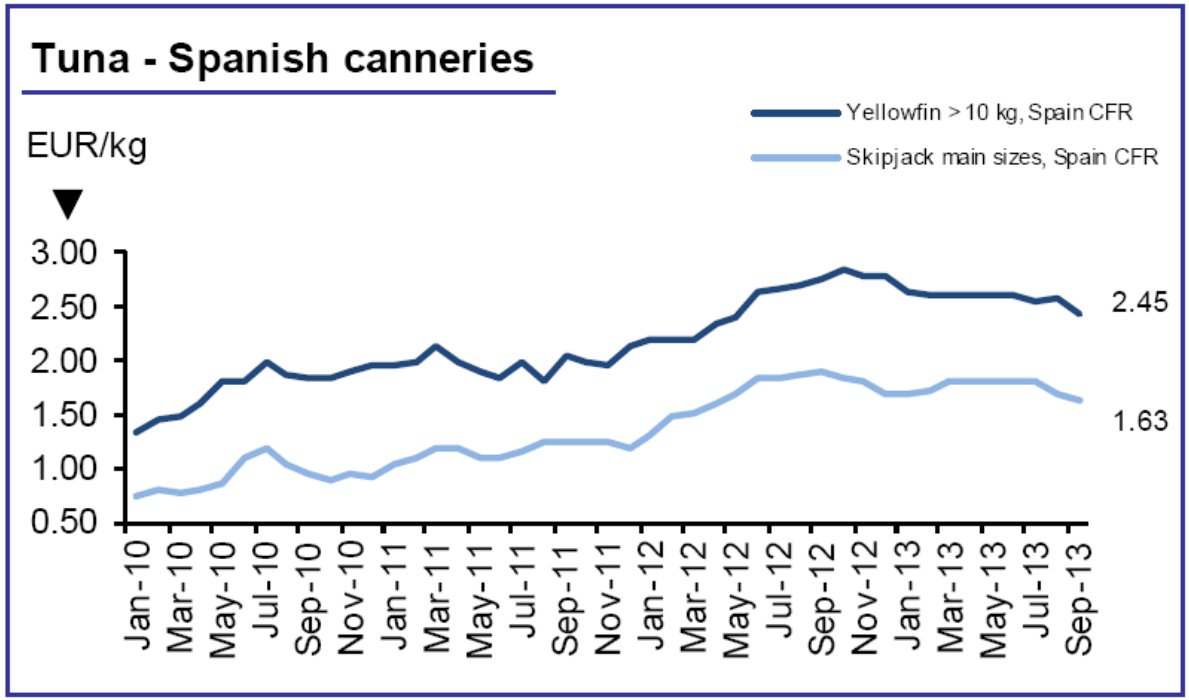
CFR Prices
Canned tuna*: USA, EUROPE



* 48x6.5 oz Europe, 48x6 oz USA, chunk, origin Thailand

Source: GLOBEFISH

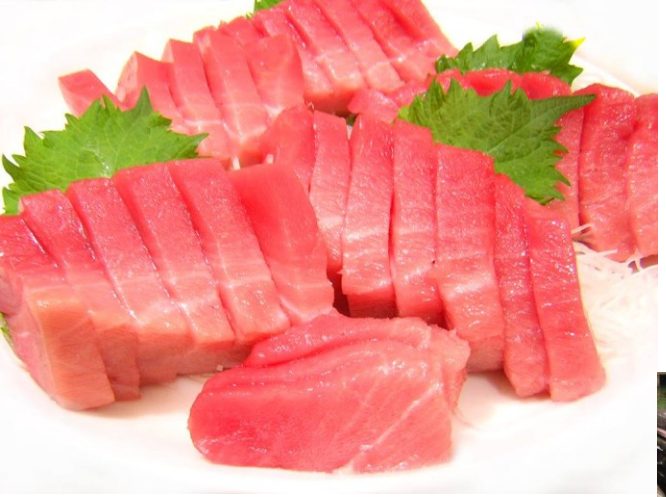




1,63 € = 2,20 USD
2,45 € = 3,31 USD

Fuente: GLOBEFISH

Tuna Mar
Del mar a tu casa
マグロ
Descubre nuestros nuevos formatos
Calidad Sashimi
Transportamos a -60° en toda Europa
MSC Bonito de altura
CERTIFIED SUSTAINABLE SEAFOOD MSC www.msc.org
Busca MSC Ecolabel
C-BV-65248-ES
SASHIMI TUNA / SASHIMI ALBACORE TUNA / OCTOPUS / SASHIMI SWORDFISH / SASHIMI MAKO SHARK / BLUE MARLIN / ESCOLAR
Recinto interior Zona Franca, Muelle Ribera s/n 11011 Cádiz. SPAIN
Tel.: +34 956 20 09 71 - Fax: 956 200 972 - www.tunamar.eu



Imports
Fresh Tuna: USA

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Yellowfin	8.7	7.6	8.1	8.3	8.3	8.0
Bigeye	3.0	2.7	2.5	1.5	2.0	2.0
Albacore	0.3	0.4	0.2	0.3	0.4	0.4
Bluefin	0.2	0.2	0.3	0.2	0.2	0.3
Skipjack	0.0	0.0	0.0	0.0	0.0	0.0
Others	0.2	0.1	0.2	0.2	0.2	0.3
Total	**12.4**	**11.0**	**11.3**	**10.5**	**11.1**	**11.0**

Source: NMFS

Imports
Tuna loins: USA

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Thailand	8.0	4.7	13.2	14.2	8.6	13.3
Fiji	5.2	5.8	6.3	4.2	4.0	5.7
China	0.2	0.0	0.0	2.0	5.8	5.2
Mauritius	3.5	3.4	2.3	3.4	2.9	4.7
Ecuador	0.3	0.0	0.1	0.0	1.3	0.7
Trin & Tob	5.1	5.1	4.2	3.2	0.0	0.0
Others	1.1	2.3	7.3	4.9	8.2	6.0
Total	**23.4**	**21.3**	**33.5**	**31.9**	**30.8**	**35.6**

Source: NFMS

Imports
Tuna loins: Spain

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Ecuador	12.2	16.6	15.0	12.9	11.1	10.9
China	1.2	1.6	2.2	3.1	1.6	5.0
Thailand	3.5	6.6	4.9	10.6	2.1	4.5
Guatemala	0.0	2.7	4.5	4.0	4.2	3.7
El Salvador	6.9	9.1	4.5	2.9	2.7	3.2
Mauritius	0.9	2.2	2.4	6.6	4.1	2.1
Indonesia	0.0	0.0	0.0	0.8	2.0	1.6
Others	1.9	4.6	2.9	3.8	4.7	5.1
Total	**26.6**	**43.4**	**36.3**	**44.6**	**32.6**	**35.9**

Source: Agencia Tributaria

Imports
Tuna loins: Italy

	Jan-Jun					
	2008	2009	2010	2011	2012	2013
	(1 000 tonnes)					
Ecuador	5.0	7.3	5.1	5.5	5.0	6.0
Thailand	2.2	8.4	4.4	3.2	4.8	2.7
China	0.4	2.2	2.2	2.3	1.5	1.6
Kenya	3.4	0.7	1.0	1.9	1.3	1.6
Mauritius	3.4	1.5	2.2	0.7	1.5	1.0
Others	5.2	2.0	4.7	5.3	4.1	6.2
Total	**19.6**	**22.1**	**19.6**	**18.9**	**18.1**	**19.1**

Source: ISTAT

Fuente: GLOBEFISH

Precios al por menor

USD 30,00 / kg
= USD 13,60/ kg equivalente peso vivo

Atum Sólido Light Coqueiro Lata 130g (8041)

R$ 7,45

▲ ▼ 1

COMPRAR

USD 25,00 / kg
= USD 13,20/ kg equivalente peso vivo

Por Vernon P. Scholey, Daniel Margulies, Maria S. Stein, Guillermo A. Compeán, Jeanne B. Wexler, Richard B. Deriso

Cría de atunes

El laboratorio de la CIAT en Achotines, Panamá

La Comisión Interamericana del Atún Tropical (CIAT) opera el Laboratorio de Achotines en la República de Panamá, en el que desde 1996, desovan en cautiverio atunes aleta amarilla. Se trata del único centro de investigación del mundo que tiene disponibilidad de huevos y larvas de atún para fines de investigación, durante prácticamente todo el año. Sus instalaciones también se utilizan para la cría de otras especies nativas, como pargos y corvinas, y en el centro trabajan conjuntamente técnicos de la CIAT con profesionales locales y del extranjero.

Una instalación única de investigación tropical

Los huevos, larvas, y juveniles de aleta amarilla que resultan de los desoves diarios, se destinan a una variedad de estudios, incluyendo investigaciones sobre los efectos de varios factores ambientales y biológicos en el crecimiento y supervivencia en las etapas tempranas del ciclo vital. Las investigaciones, que se concentran en la ecología y biología de los atunes, podrán generar información importante para la evaluación de las poblaciones y el ordenamiento de las mismas, aunque se está investigando también sobre otros temas. Las investigaciones son realizadas por miembros del grupo de expertos que estudian el ciclo vital temprano (CVT) de la CIAT. Hay científicos de otras instituciones que también realizan investigaciones en el Laboratorio de Achotines, a menudo en colaboración con profesionales del programa de CVT de la CIAT. Además, el laboratorio apoya investigaciones de especies de peces marinos costeros que realizan los biólogos de la Autoridad de los Recursos Acuáticos de Panamá (ARAP).

Una favorable ubicación

El laboratorio está situado adyacente a la bahía de Achotines, en la provincia de Los Santos, en la punta sudeste de la península de Azuero, sobre el litoral del Pacífico de la República de Panamá (figura 1). La variación anual de la temperatura superficial del mar en estas aguas es de aproximadamente 21º a 29ºC. La plataforma continental frente a la bahía es bastante estrecha: el agua alcanza profundidades de más de 200 m a menos de 8 km de la costa, lo que permite a los científicos acceso fácil a aguas oceánicas en las que el desove de atunes ocurre en todos los meses del año.

Figura 1: Ubicación del Laboratorio de Achotines

En tierra, el terreno del laboratorio incluye 120 hectáreas de bosque tropical seco, actualmente el más amenazado de los principales ecosistemas tropicales (figura 2). Anteriormente, este tipo de bosque cubría unos 550.000 km^2 de la costa del Pacífico entre Panamá y México; hoy en día quedan solamente unos 10.000 km^2 intactos, y de éstos menos de 600 km^2 gozan de protección oficial. La mayoría del bosque en la provincia de Los Santos fue despejada para pasto y agricultura, pero cubre todavía más de 70 hectáreas de la zona que rodea el laboratorio, y se están restaurando rápidamente las 50 hectáreas restantes.

La región se caracteriza por temporadas marcadas de lluvia y de sequía y patrones dinámicos de circulación marina, lo que lleva a una amplia variabilidad natural del hábitat costero. Se han encontrado más de 150 especies de peces en la Bahía de Achotines y alrededores inmediatos, entre ellas al menos diez especies de túnidos y "picudos". La bahía contiene uno de los pocos arrecifes de coral del litoral Pacífico de Centroamérica, y en las islas Frailes anidan grandes cantidades de aves marinas. En la isla de Cañas hay un importante sitio de

Acuicultura del Atún - en 2010
9.412 TM producidas

(capturas de tunideos en 2010: 6.620.373 TM)

Atún rojo del Atlantico – *Thunnus thynnus*
Canadá: 1.680 TM
Mar Mediterráneo: 2.400 TM

Atún aleta azul del pacifico – *Thunnus orientalis*
México: 2.008 TM

Atún rojo del Sur - *Thunnus maccoyii*
Australia: 3.324 TM

MERCADOS EMERGENTES

El Sector Pesquero y Acuícola Latinoamericano en 2009

	Producción para fines industriales	Exportaciones	Consumo de Pescado en America Latina & el Caribe	Total
Producción (en TM)	9.473.024 TM* de pescado fresco o 2.131.430 TM** de harina y 473.651 TM** de aceite	3.702.530 TM* De los cuales 1.031.000 MT* intrarregional	5.792.927 TM* (incluyen 1.841.077 TM* importaciones)	
Precio promedio	USD 1,50/kg harina USD 2,20/kg aceite	USD 3.10/kg FOB	USD 6,00/kg (al por menor)***	
Valor total: en USD	**4.239.177.200**	**8.281.743.000**	**34.757.562.000**	**47.278.482.200**

* Estadísticas FAO 2009
** Tasa de conversión de IFFO (1000 kg de pescado fresco = 225 Kg de harina + 50 kg de aceite)
*** estimativa por INFOPESCA

Aumento promedio del valor del mercado: 2,5% por año desde el año 2000

Valor total del sector pesquero y acuícola latinoamericano y caribeño en 2013: Estimado en USD 52.200 millones

El Mercado de Pescado Africano:

9.400.000.000 KG consumidos en 2009

X

Precio promedio al por menor USD 5,00 /kg

=

USD 47.000 millones al año

incluye importaciones de USD 3.400 millones (FAO, 2009)

Crecimiento promedio de 10% al año en los últimos 5 años

Se puede prever que el consumo de productos pesqueros podrá duplicar o triplicar hasta 2025 con el incentivo de políticas pesqueras/acuícolas adecuadas.

En comparación, las exportaciones africanas fueron de USD 4.500 millones (FAO, 2009)

INFOPESCA

¡ GRACIAS !