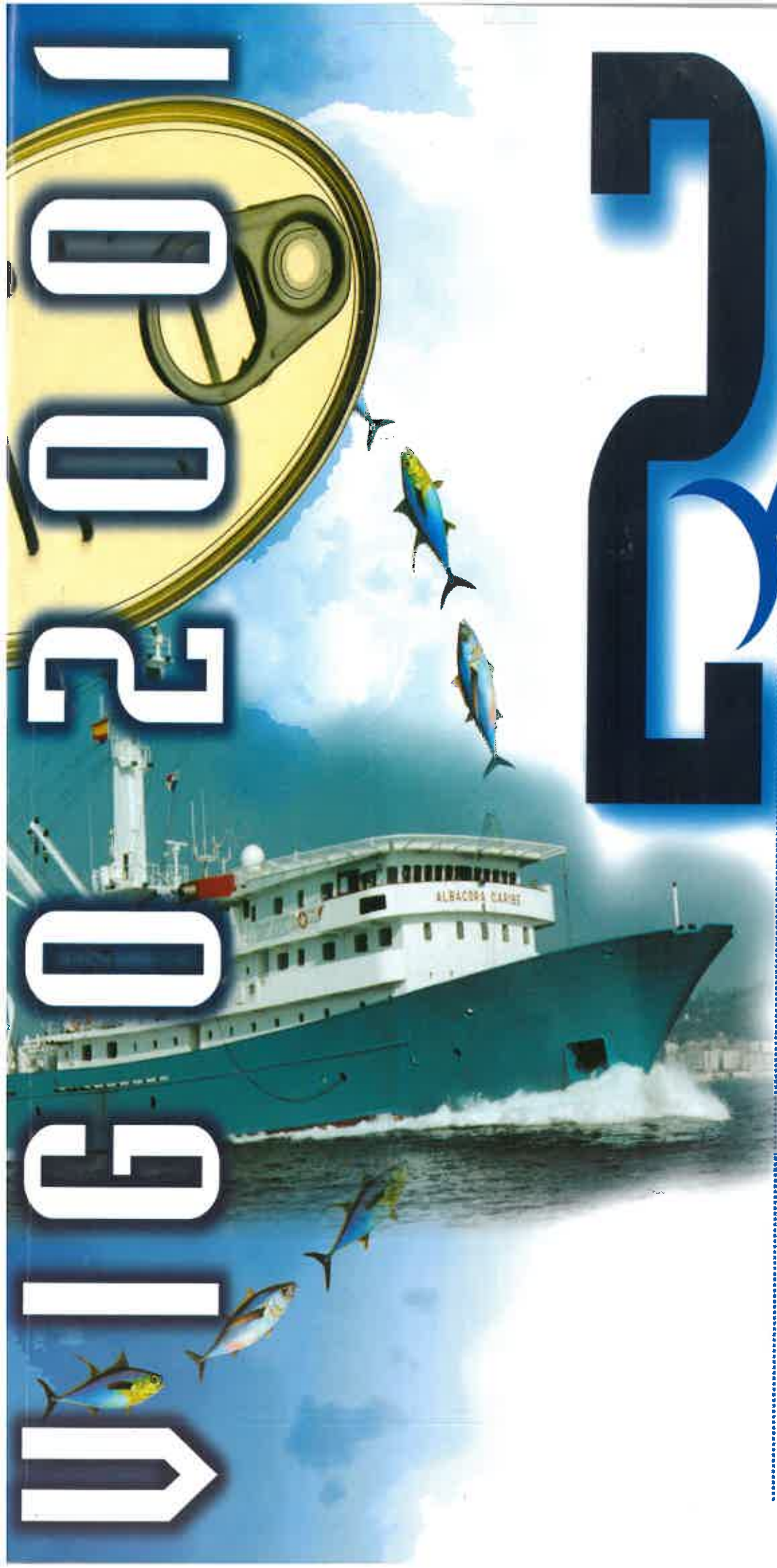




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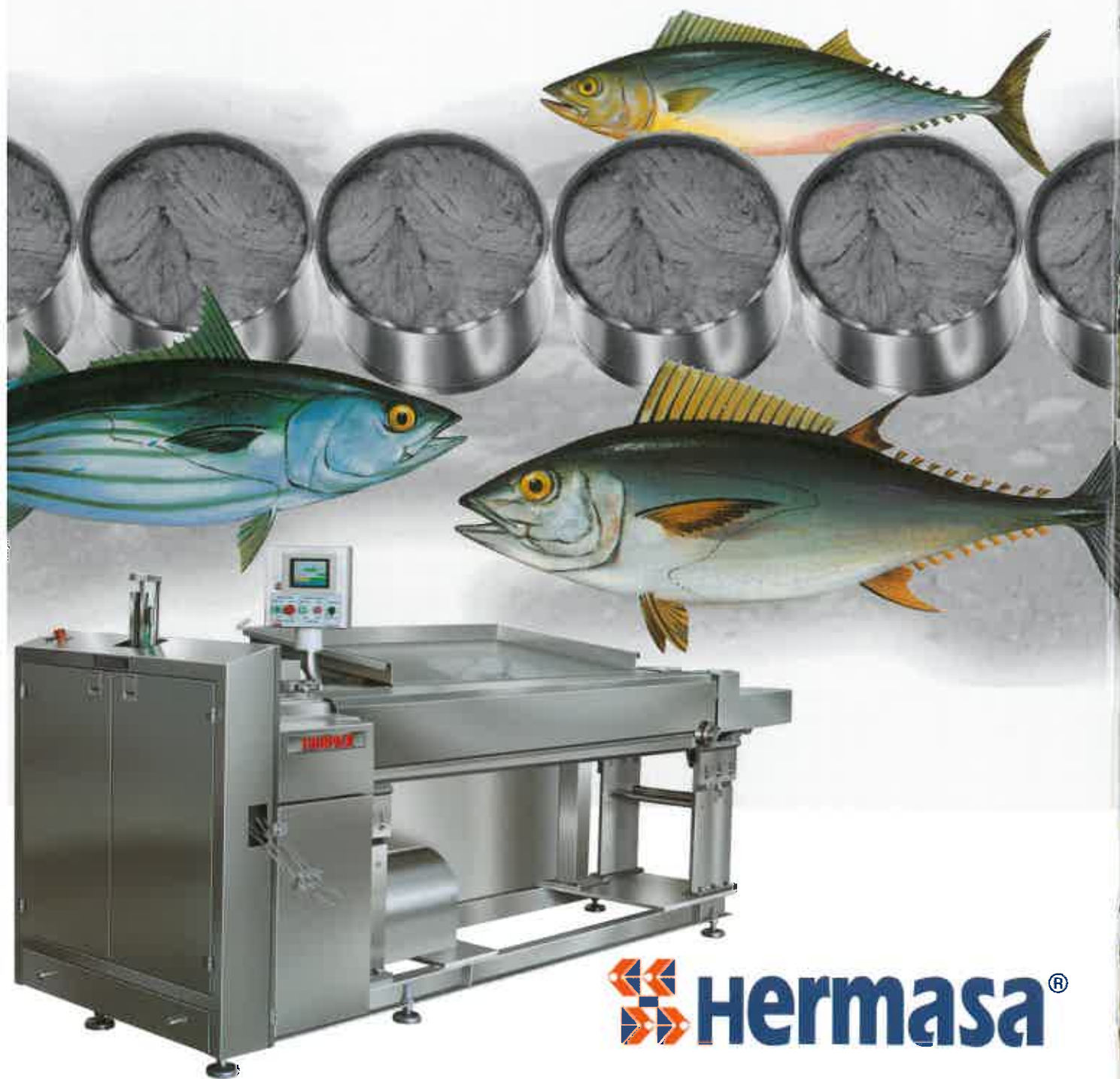
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“Vigo 2001”

18-19 DE SEPTIEMBRE DE 2001



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DE FABRICANTES DE
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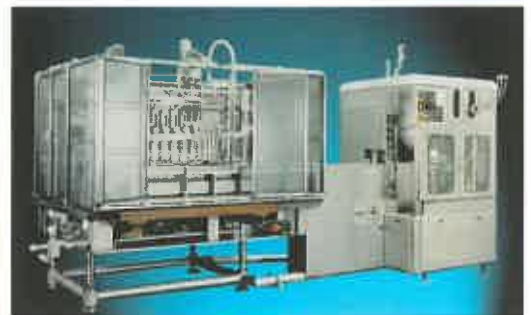
The FMC Tuna Processing System is expressly designed to accommodate all sizes of tuna, improving efficiency of operations and lowering capital costs. A unique labor-saving feature of this FMC line is its capacity to process whole smaller tuna in its automatic Peeling and Washing cycles, minimizing subsequent manual labor at the cleaning tables.

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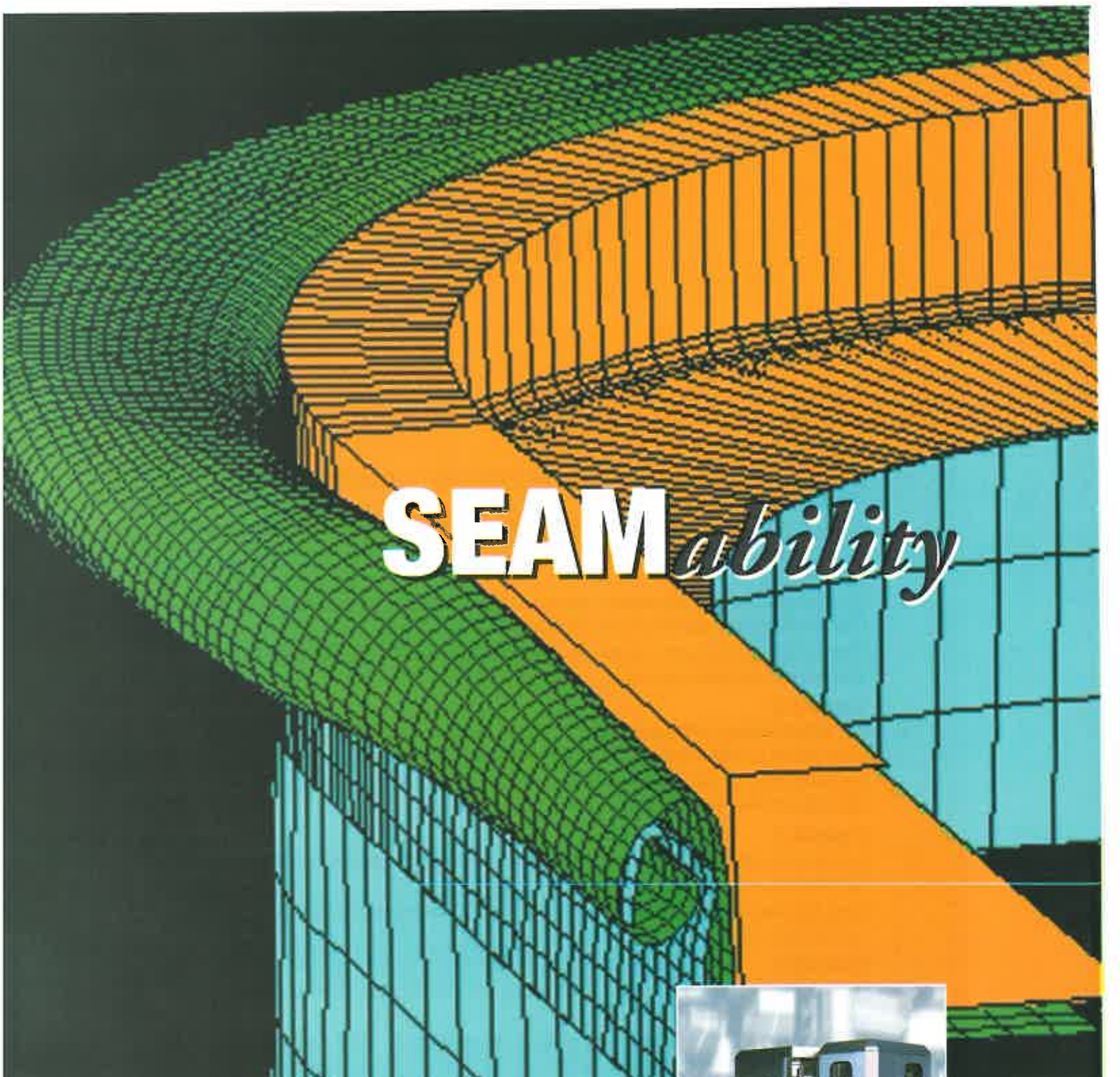
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ÍNDICE

Pág.	
11	PRESENTACIÓN
15	PROGRAMA
	<u>Ponencia 1:</u>
19	EL MERCADO ÚNICO EUROPEO: UN NUEVO ESCENARIO PARA EL ATÚN. POSIBILIDADES Y RETOS DEL CONSUMO <i>THE EUROPEAN SINGLE MARKET: A NEW SCENE FOR TUNA. CONSUMPTION POSIBILITIES AND CHALLENGES.</i>
	<u>Ponencia 2:</u>
35	EL ATÚN EN LA NUEVA ECONOMÍA: INNOVACIONES TECNOLÓGICAS RELATIVAS A LA PESCA, TRANSFORMACIÓN Y COMERCIALIZACIÓN DEL ATÚN <i>TUNA IN THE NEW ECONOMY: TECHNOLOGICAL INNOVATIONS RELATED TO FISHERIES, TUNA PROCESSING AND COMERCIALIZATION</i>
	<u>Ponencia 3:</u>
55	LOS INTERCAMBIOS INTERNACIONALES Y LA OMC: IMPLICACIONES PARA LAS EMPRESAS DEL ATÚN DE LOS SISTEMAS ACP Y SPG EN AMÉRICA LATINA Y OTRAS ZONAS DEL MUNDO <i>INTERNATIONAL EXCHANGES AND THE WTO: CONSEQUENCES TO TUNA COMPANIES FROM ACP AND PGS SYSTEMS IN LATINAMERICA AND ANOTHER REGIONS</i>
	<u>Ponencia 4:</u>
71	LA PESCA DEL ATÚN Y SU ABASTECIMIENTO A LA INDUSTRIA: SITUACIÓN ACTUAL Y PERSPECTIVAS FUTURAS DEL RECURSO Y LOS PRECIOS <i>TUNA FISHERIES AND ITS SUPPLY TO PROCESSOR INDUSTRY: PRESENT SITUATION AND FUTURE OUTLOOK OF THE RAW MATERIAL AND PRICES</i>
	<u>Ponencia 5:</u>
81	LOS AVANCES TECNOLÓGICOS APLICABLES A LA PESCA, TRANSFORMACIÓN Y COMERCIALIZACIÓN DEL ATÚN <i>TECHNOLOGICAL INNOVATIONS APPLICABLE TO FISHERIES, TUNA PROCESSING AND COMMERCIALIZATION</i>
	<u>Ponencia 6:</u>
91	LA EMPRESA ATUNERA EN EL MERCADO GLOBAL. SITUACIÓN ACTUAL Y OPCIONES DE FUTURO DEL MERCADO DEL ATÚN A NIVEL EXTRACOMUNITARIO <i>THE TUNA COMPANIES IN A GLOBAL MARKET. PRESENT SITUATION AND FUTURE PERSPECTIVES TO TUNA MARKET OUTSIDE THE EUROPEAN UNION.</i>
	<u>Ponencia 7:</u>
131	SITUACIÓN ACTUAL Y PERSPECTIVAS FUTURAS DEL MERCADO DEL ATÚN EN CONSERVA Y SUS MARCAS EN LA UE <i>PRESENT SITUATION AND FUTURE OUTLOOK OF THE TUNA MARKET AND ITS BRANDS IN THE EUROPEAN UNION</i>
	<u>Ponencia 8:</u>
161	ANÁLISIS DE LA SITUACIÓN DEL RECURSO Y DEL MERCADO DEL ATÚN A NIVEL MUNDIAL <i>ANALYSIS OF THE RAW MATERIAL SITUATION AND THE TUNA MARKET AT WORLD-WIDE LEVEL</i>



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PRESENTACIÓN

*P*rocedemos a presentar ante todos ustedes el libro recopilatorio de las ponencias de la II Conferencia Europea del Atún "Vigo 2001", la cual se celebra en el marco del Foro Internacional de Conservación de Productos de la Pesca de Galicia, creado por ANFACO en 1.995.

Nuestra asociación ha programado esta Conferencia desde el convencimiento de la necesidad de refrendar, con actividades como esta, el liderazgo de España y Galicia en la transformación de productos del mar a nivel comunitario, pues de hecho cabe considerar a Galicia como la primera región en cuanto a transformación de pescados y mariscos en variedad de productos y preparaciones, inclusive a nivel mundial.

El atún es actualmente el producto estrella para gran parte de la flota pesquera y para la industria transformadora de productos de la pesca. Nuestro país es actualmente el tercer productor mundial de conservas de atún con 148.000 tn. Anuales. Únicamente superan esta cifras de producción EEUU, con 250.000 tn.y Tailandia.

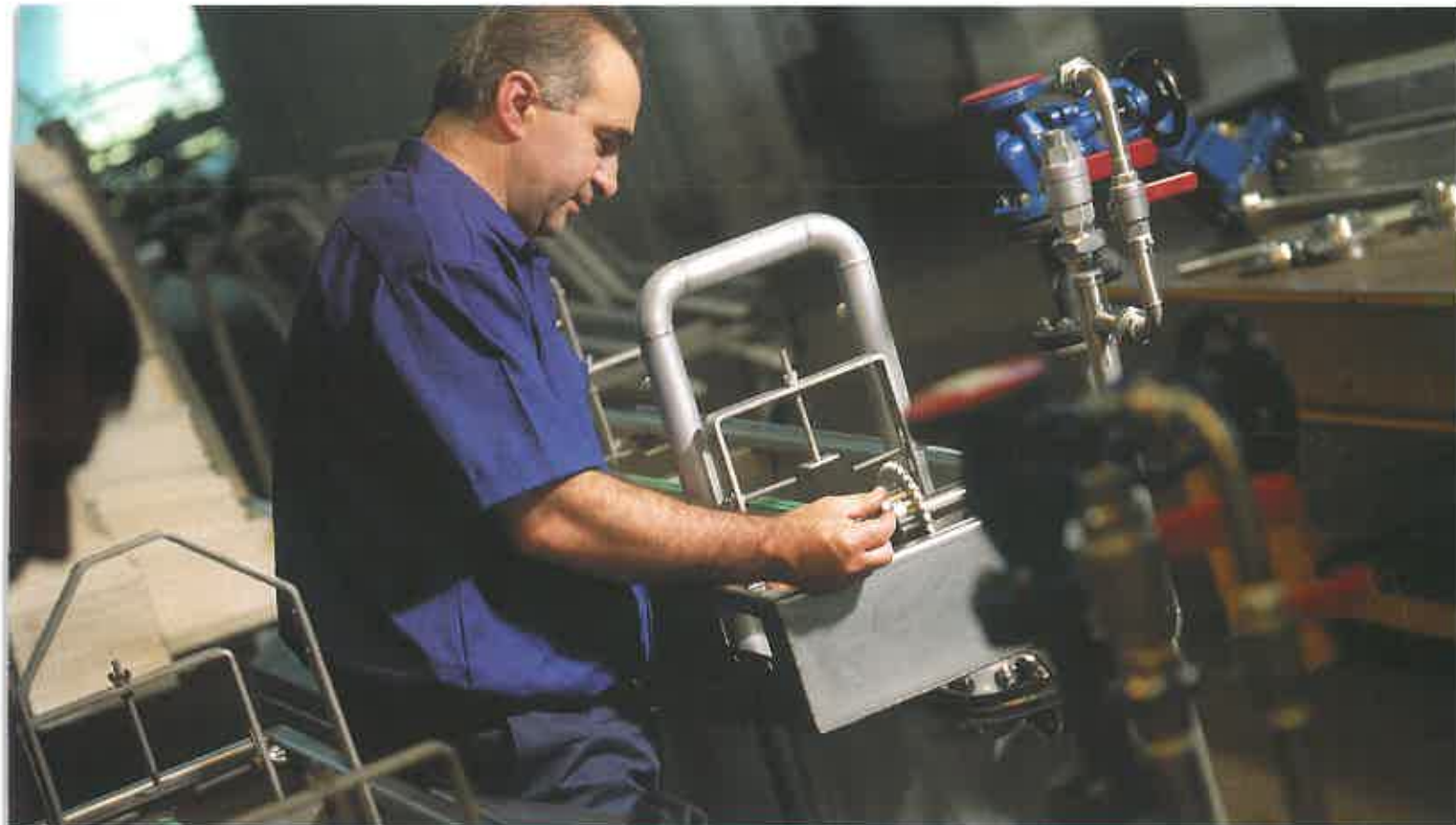
Asimismo, España es el país del mundo que presenta el consumo más elevado de atún, con 3,7 kg/per capita. La flota atunera captura entre el 15 y el 20% de las capturas mundiales, ascendiendo sus desembarcos a 400.000 tn. Anuales a los que hay que sumar 100.000 tn. Más procedentes de buques abanderados. De las capturas totales de atún, que asciende a 3,2 millones de toneladas anuales, 1,4 se destinan a la producción de conservas.

Así pues, estas estadísticas explican por sí mismas la importancia de reunir en Vigo y Galicia a las empresas líderes del sector transformador, flota atunera y comercializadores de atún a nivel mundial.

Permítanme reseñar especialmente la presencia de las destacadísimas autoridades y personalidades del mundo de la pesca, transformación y acuicultura, que han confirmado su presencia en la conferencia, así como la representación de primerísimo nivel de los ejecutivos que lideran estas empresas atuneras y la práctica totalidad del sector español.

Todo ello hace que tras la celebración de la conferencia podamos decir que los días 18 y 19 de Septiembre Vigo ha sido el centro de atención de la industria atunera mundial, pues estamos convencidos de que iniciativas como esta definen la vocación de mejora continua del sector transformador de productos del mar, un sector de carácter estratégico y creador de riqueza para nuestra economía, contribuyendo a consolidar esta privilegiada situación y, a aspirar a mayores cotas, abriendo nuevos mercados y generando riqueza para Galicia y España.

Juan M. Vieites Baptista de Sousa
Secretario General ANFACO



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PROGRAMA

18 DE SEPTIEMBRE DE 2001

- 09:30-10:00 H.:** ENTREGA DE DOCUMENTACIÓN
- 10:00-11:00 H.:** **EL MERCADO ÚNICO EUROPEO: UN NUEVO ESCENARIO PARA EL ATÚN. POSIBILIDADES Y RETOS DEL CONSUMO**
- D. DANIEL VARELA SUANZES-CARPEGNA, PRESIDENTE DE LA COMISIÓN DE PESCA DEL PARLAMENTO EUROPEO
 - DÑA. ROSA MÍGUELEZ RAMOS, VICEPRESIDENTA PRIMERA DE LA COMISIÓN DE PESCA DEL PARLAMENTO EUROPEO
 - ILMO. SR. D. SAMUEL JUÁREZ CASADO, SECRETARÍO GENERAL DE PESCA MARÍTIMA – MAPA
- MODERADOR: D. ALVARO PÉREZ-LAFUENTE BÓVEDA, PRESIDENTE DE ANFACO*
- 11:00-12:00 H.:** **EL ATÚN EN LA NUEVA ECONOMÍA: INNOVACIONES TECNOLÓGICAS RELATIVAS A LA PESCA, TRANSFORMACIÓN Y COMERCIALIZACIÓN DEL ATÚN**
- MR. HENK BRUS, MANAGING DIRECTOR WWW.ATUNA.COM
 - MR. ANDRÉ LOUBET-JAMBER, FOUNDER AND CHAIRMAN, FISH HOLDING
 - D. ANTONIO SANZ PULIDO PROJECT MANAGER DEL PROYECTO E-CANNED, SCHLUMBERGERSEMA
- MODERADOR: D. JOSÉ A. RODRÍGUEZ, DIRECTOR GENERAL DE CONSERVAS ISABEL DE GALICIA, S.L.*
- 12:00-12:30 H.:** INAUGURACIÓN
- 12:30-14:00 H.:** **LOS INTERCAMBIOS INTERNACIONALES Y LA OMC: IMPLICACIONES PARA LAS EMPRESAS DEL ATÚN DE LOS SISTEMAS ACP Y SPG EN AMÉRICA LATINA Y OTRAS ZONAS DEL MUNDO**
- EXCMO. SR. D. FRANCISCO UTRERA MORA, SECRETARIO GENERAL DE COMERCIO EXTERIOR – MINISTERIO DE ECONOMÍA
 - MR. BAUDOUIN SURY, JEFE DE LA UNIDAD DE LA DIRECTION A/4 "FISH-MARCHÉS", DG PESCA-UE
 - ILMO. SR. D. ALBERTO LÓPEZ GARCÍA-ASENJO, CONSEJERO DE AGRICULTURA, PESCA Y ALIMENTACIÓN, REPER
- MODERADOR: D. GUILLERMO ALONSO JAÚDENES, DIRECTOR GENERAL DE ANTONIO ALONSO, S.A.*
- 14:00-17:00 H.:** ALMUERZO OFRECIDO POR CAYMSA
- 17:00-18:30 H.:** **LA PESCA DEL ATÚN Y SU ABASTECIMIENTO A LA INDUSTRIA: SITUACIÓN ACTUAL Y PERSPECTIVAS FUTURAS DEL RECURSO Y LOS PRECIOS**
- ESPAÑA:
- D. IGNACIO LACHAGA BENGOCHEA, PRESIDENTE DE OPAGAC Y ALBACORA
 - D. JOSÉ A. ANGULO DIRECTOR GERENTE DE ANABAC-OPTUC
- FRANCIA:
- MR. MICHEL DION, MANAGING DIRECTOR ORTHONGEL
- MODERADOR: D. FÉLIX CONDE RODRÍGUEZ, DIRECTOR GENERAL DE CONNORSA*
- 18:30-20:00 H.:** **LOS AVANCES TECNOLÓGICOS APLICABLES A LA PESCA, TRANSFORMACIÓN Y COMERCIALIZACIÓN DEL ATÚN**
- D. MANUEL CALVO GARCÍA BENAVIDES, DIRECTOR DE FLOTA DE CALVOPESCA
 - D. RICARDO MOLINET, DIRECTOR DE AVATUN
 - D. FÉLIX GASTÓN, GERENTE DE MANUFACTURAS ALIMENTOS MARGARITA, C.A.
- MODERADOR: D. FERNANDO GARCÍA DEL VALLE, PRESIDENTE DE BERNARDO ALFAGEME, S.A.*
- 21:00 H.:** RECEPCIÓN OFRECIDA POR EL EXCMO. AYUNTAMIENTO DE VIGO

19 DE SEPTIEMBRE DE 2001

- 09:30-12:00 H.:** **LA EMPRESA ATUNERA EN EL MERCADO GLOBAL. SITUACIÓN ACTUAL Y OPCIONES DE FUTURO DEL MERCADO DEL ATÚN A NIVEL EXTRACOMUNITARIO**
- AMÉRICA
 - EE.UU.:
 - MR. CHRISTOPHER LISCHEWSKY, PRESIDENT AND CHIEF OPERATION OFFICER BUMBLE BEE SEAFOODS INC.
 - MÉXICO:
 - D. ANTONIO SUÁREZ GUTIÉRREZ, PRESIDENTE DE GRUPOMAR
 - D. GERARDO LOJEDO, DIRECTOR OPERATIVO DE COMEXTUN
 - ÁFRICA, ASIA Y ZONA PACÍFICO
 - SEYCHELLES:
 - MR. JOEL NAGEON DE LESTANG, SEYCHELLES FISHING AUHORITIE
 - TAILANDIA:
 - MR. DATO TAN BOON PIN, CHAIRMAN TROPICAL CANNING PUBLIC CO. LTD.
 - FILIPINAS:
 - MR. FRANCISCO TIU LAUREL JR., PRESIDENT FRABELLE FISHING CORPORATION
 - SAMOA:
 - MR. HERMAN T. GEBAUER, GENERAL MANAGER COS SAMOA PACKING
- MODERADOR: D. LORENZO BLANCO REFOJOS, DIRECTOR GENERAL DE THENAISIE-PROVOTÊ S.A.*
- 12:00-12:30 H.:** **CAFÉ / VISITA A LA EXPOSICIÓN DE PRODUCTO Y MAQUINARIA (PLANTA PILOTO DE ANFACO)**
- 12:30-14:00 H.:** **SITUACIÓN ACTUAL Y PERSPECTIVAS FUTURAS DEL MERCADO DEL ATÚN EN CONSERVA Y SUS MARCAS EN LA UE**
- FRANCIA:
 - MR. ALAIN CASSUTO, PRESIDENTE DIRECTOR GENERAL DE PECHE ET FROID S.A.
 - MR. PIERRE COMMERE, SECRETARIO GENERAL DE FIAC
 - ITALIA:
 - MR. DAVID SCHARPIRA, DIRECTOR DE MARKETING TRINITY ALIMENTARY ITALIA SpA
 - ESPAÑA:
 - D. JESUS M. ALONSO ESCURIS, DIRECTOR GENERAL DE JEALSA -RIANXEIRA S.A.
- MODERADOR: SR. D. JOSÉ LUIS CALVO PUMPIDO, PRESIDENTE Y CONSEJERO DELEGADO DEL GRUPO CALVO.*
- 14:00-17:00 H.:** **ALMUERZO OFRECIDO POR HERMASA**
- 17:00-19:30 h.:** **ANÁLISIS DE LA SITUACIÓN DEL RECURSO Y DEL MERCADO DEL ATÚN A NIVEL MUNDIAL**
- MR. RENATO CURTO, PRESIDENT TRI-MARINE INTERNATIONAL INC
 - MR. JAMES JOSEPH, DIRECTOR INTER-AMERICAN TROPICAL TUNA COMMISSION - CIAT
 - MR. ADOLFO RIBEIRO LIMA, SECRETARY GENERAL INTERNATIONAL COMMISSION FOR THE CONSERVATION OF ATLANTIC TUNA- ICCAT
- MODERADOR: D. VÍCTOR PITA RIVA, GERENTE DE PITA HERMANOS, S.A.*
- 19:30-20:00 H.:** **CLAUSURA**
- 21:00 H.:** **RECEPCIÓN OFRECIDA POR CAIXANOVA**



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PONENCIA / SESSION

1

EL MERCADO UNICO EUROPEO: UN NUEVO ESCENARIO PARA EL ATÚN. POSIBILIDADES Y RETOS DEL CONSUMO

THE EUROPEAN SINGLE MARKET: A NEW SCENE FOR TUNA. CONSUMPTION POSIBILITIES AND CHALLENGES

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EL MERCADO INTERIOR EUROPEO: UN NUEVO ESCENARIO PARA EL ATÚN. CONSUMO, POSIBILIDADES Y DESAFÍOS

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Introducción

Conforme a las disposiciones del Tratado de la Unión Europea, la Organización Común de Mercados de Productos de la Pesca (OCM), como la propia política pesquera comunitaria (PPC) tiene su fundamento en las disposiciones del art. 39 del Tratado de la Comunidad Europea (TCE) lo que en la práctica quiere decir que los objetivos de garantizar la seguridad de abastecimientos y asegurar al consumidor los suministros a precio razonable constituye un eje prioritario de acción comunitaria.

Así mismo, los principios originales que contienen las disposiciones sobre el mercado¹ contemplan una serie de factores que habrán de observarse en la adopción de medidas normativas. Así, se señala la importancia de la estabilidad de los mercados, citándose específicamente la dependencia que tienen algunas regiones costeras comunitarias de la actividad pesquera. En este contexto, se mencionan como objetivos adicionales la necesidad "de adaptar la oferta a las demandas del mercado y garantizar, en la medida de lo posible unos ingresos equitativos a los profesionales del sector pesquero". Además, la normativa dispone que los productos que tengan una calidad insuficiente deberán ser desviados del mercado para facilitar la libre competencia.

Es evidente que estos objetivos en algunos supuestos pueden resultar contradictorios al intentar aplicarlos, para resolver la contradicción se necesita practicar sabios equilibrios. En la actualidad, la Unión Europea, uno de los más importantes mercados mundiales de productos de la pesca importa más del 60% de los productos pesqueros que consume, cifra que está en permanente crecimiento. A su vez, el sector pesquero comunitario, en el que se engloba la captura, el sector de transformación así como la acuicultura, es uno de los más productivos de la Comunidad dependiendo innumerables puestos de trabajo de su desarrollo, tanto directos, como empleo inducido. Esta es la situación que describe a numerosas regiones comunitarias donde el sector pesquero puede ser legítimamente definido como el motor de toda la economía regional.

En estas condiciones no resulta difícil comprender por qué la orientación de la política de mercados de la Unión Europea en productos de la pesca levanta debate y pasión. Por supuesto, como se puede comprender, en este debate existen diferentes opiniones en función de los intereses particulares de cada Estado miembro, incluso en cada ámbito nacional existen diferentes intereses regionales que pueden implicar la existencia de posiciones divergentes. El suministro de atún al mercado comunitario es un supuesto concreto de esta situación.

Las reflexiones que siguen proceden del análisis de los diferentes intereses en juego en la UE y parten —adaptándolas a la realidad de hoy— de las consideraciones que hizo suyas el Pleno del Parlamento Europeo (PE) al aprobar en 1998 el primer —y hasta ahora único— "Informe sobre la industria de conservas de pescado y productos de la pesca y la acuicultura en la UE" del que tuve el honor de ser Ponente (en adelante el Informe del PE).

¹ Reglamento del Consejo (CEE) 3759/92, OJL 388, 31.12.1999, p 1.

La nueva organización común de mercado

La respuesta de la Comisión Europea a la evolución del mercado ha sido, en primer lugar, presentar en diciembre de 1997, una comunicación al Consejo y al Parlamento² seguida meses más tarde por una propuesta de reglamento en la que se reforma la organización común del mercado de productos de la pesca y acuicultura³.

El nuevo marco normativo mantiene los objetivos del anterior pero añadiendo algunos más, en particular la necesidad por parte de la Organización Común de Mercados (OCM) de contribuir a la gestión responsable de los recursos, a aumentar la transparencia y promover la colaboración y un mayor grado de responsabilidad por parte de los productores, para asegurar suministros suficientes al mercado en fresco y a la industria de transformación en condiciones tales que les permita competir a nivel mundial.

La Comisión asumió la cooperación, la competitividad y la responsabilidad como piezas claves a la hora de abordar la revisión de las organizaciones comunes de mercado.

El compromiso resultante de abastecer al mercado comunitario del atún ha sido el resultado directo de un intento de compaginar estos objetivos y principios.

La producción comunitaria del atún

Según datos de nuestro Informe del PE, se pescan anualmente unos 3.2 millones de toneladas de atún, de los cuales, aproximadamente una tercera parte corresponde a barcos con bandera comunitaria o pertenecientes a propietarios de la Unión Europea; o bien es exportado a la Unión Europea por terceros países.

En concreto, los desembarcos en la Unión Europea en 1998 alcanzaron las 350.000 T, asimismo fueron importadas al mercado comunitario 225.000 T de producto congelado, así como 250.000 toneladas de atún enlatado.

Ahora bien, la cifra correspondiente a los desembarcos está infravalorada dado que algunos barcos controlados por armadores comunitarios operan bajo bandera no comunitaria, lo que según cálculos estimativos supone unas capturas adicionales de 100.000 T.

Por otra parte, la Unión Europea exportó 150.000 T de atún congelado.

Dos Estados miembros, España y Francia son los protagonistas de la mayoría de los desembarcos comunitarios bien a través de barcos que operan bajo sus banderas nacionales o bien a través de barcos que operan bajo otros pabellones. España en la actualidad tiene 67 cerqueros congeladores, siendo 37 los correspondientes a la flota francesa, navíos que operan en el Atlántico, Índico y en los últimos años en el Pacífico, capturando entre todos más de 450.000 TM. Por su parte, hay que hacer mención que parte del atún capturado por la flota de la Unión Europea es desembarcado en puertos externos a la Comunidad, lo que implica que aunque en un principio Europa es potencialmente autosuficiente con respecto a la materia prima constituida por el atún congelado, debido a estos significativos desembarcos en puertos extranjeros una creciente proporción de los suministros al mercado comunitario proviene en la actualidad de la importación.

El suministro del atún importado al mercado comunitario puede ser englobado en 3 categorías: congelado, enlatado y lomos de atún semiprosesados.

² El futuro del mercado de productos de la pesca en la Unión Europea: responsabilidad,... y competitividad (COM) (1997) 719)

³ (COM) (1999) 55 final, 16.02.1999

En lo que respecta a la importación de material congelado destinado a la conserva en la Unión Europea, el mercado español ha experimentado un notable crecimiento en los últimos años, mientras que las importaciones al mercado italiano han paulatinamente descendido, excepto en lo que se refiere a los lomos de atún. Las importaciones del atún enlatado suponen aproximadamente un 40% del mercado comunitario siendo los principales mercados destinatarios el Reino Unido, Alemania, Francia, Italia y los Países Bajos.

La demanda de importaciones de lomos de atún ha experimentado un notable crecimiento duplicándose en el período de los últimos 5 años, en concreto Italia, el mayor importador, ha experimentado un crecimiento de lomos de atún destinado a conserva de aproximadamente un 16% anual. Asimismo, en España se ha manifestado una creciente demanda de lomos de atún para la conserva, mientras que en Francia estas importaciones que vienen principalmente de los países francófonos del oeste de África, se mantienen estables en niveles reducidos.

La causa de estos crecientes niveles de importación en el mercado europeo (asimismo para los desembarcos de la flota de la Unión Europea en el extranjero) es, por supuesto, el coste. Entre los objetivos y principios de la Organización Común de Mercado, señalados anteriormente, cabe destacar el desarrollo de una política de suministros que satisfaga la necesidad real del conjunto de la industria de transformación comunitaria, apoyando a la flota comunitaria y garantizando el acceso de la materia prima requerida en las mejores condiciones que pueda procurar el mercado mundial.

En otras palabras, la Comunidad tiene que desenvolverse en el marco de una palabra clave "La responsabilidad", la necesidad de conservar los recursos pesqueros y el equilibrio de intereses entre la industria transformadora y el sector pesquero comunitario dedicado a la captura, sin dejar de lado la competitividad, asegurándose de que la industria de transformación comunitaria y los pescadores sean competitivos. Es necesario superar las diferencias entre los intereses de los productores comunitarios que buscan objetivos tales como asegurar los suministros de los consumidores a unos precios racionales y la necesidad de "garantizar" en la medida de lo posible un ingreso equitativo a los productores. Estos objetivos complementarios como mejor se pueden lograr es asegurando la estabilidad de los mercados y alentando la cooperación entre el sector de la captura comunitaria y la industria de transformación mediante contratos que beneficien a ambas partes en el marco de la libre competencia.

La organización común de mercado y el comercio con terceros países

La nueva regulación sobre el mercado de productos de la pesca que se encuentra en vigor desde el 2001 ha supuesto una continuación de la política de conceder suspensiones tarifarias al atún congelado destinado a la transformación en el mercado comunitario, suspensiones arancelarias destinadas a garantizar la competitividad del sector de la conserva comunitaria. Por otra parte, el atún enlatado y los lomos de atún semiprosesados están sujetos a una tarifa aduanera común de 24%, lo que no es elevado si la comparamos con el 35% arancel aplicado en los Estados Unidos. Por otra parte, existe una cuantiosa gama de tarifas preferenciales. En primer lugar, aquellos concedidos a los países ACP que han gozado de regímenes muy beneficiosos que han supuesto un libre acceso al mercado comunitario de los productos provenientes de estos países procesados o semiprosesados. En segundo lugar, al igual que muchos países de la OCDE la Unión Europea aplica el sistema de tarifas preferenciales contemplado en el sistema de preferencias generalizadas en particular con los llamados países SPG-drogas, países integrantes del mercado común centroamericano (CACM) y del Pacto andino⁴, medidas contempladas para apoyar la lucha contra la droga.

⁴ Colombia, Ecuador, Bolivia, Perú, Venezuela, Guatemala, Costa Rica, Panamá, Nicaragua, Honduras, El Salvador.

Por último, la Unión Europea tiene un gran elenco de acuerdos bilaterales de libre comercio y acuerdos de asociación que permiten un libre o bien privilegiado acceso a los mercados comunitarios. En los últimos años, en relación con el atún, las mayores dificultades a las que se ha enfrentado la industria conservera comunitaria han sido las consecuencias de los acuerdos comerciales con países tales como Marruecos o Turquía, acuerdos que suponen la apertura del mercado comunitario a productos provenientes de estos países en grandes cantidades que compiten con los productos pesqueros tradicionales de la UE. En los años recientes, el más significativo de estos acuerdos ha sido el tratado de libre comercio con Méjico que fue firmado el 23 de marzo de 2000 y entró en vigor el 1 de julio de ese año.

Conforme a esta descripción llegamos a la conclusión de que la importación de productos de pesca de la Unión es un mercado altamente liberalizado alcanzando un 99% de los mismos, sin embargo para algunos productos que son muy sensibles como puede ser el atún procesado o semiprocado los derechos aduaneros están previstos que se vayan dismantelando en el transcurso de un período de 10 años. Asimismo, se observarán estrictamente las reglas comunitarias sobre el origen de mercancías. Con respecto al atún, Méjico no consiguió las concesiones que solicitaba que en resumidas cuentas suponían un tratamiento de acceso preferencial del que gozan algunos países en vías de desarrollo especialmente aquellos que forman parte del Pacto andino.

Por otra parte, conforme a las informaciones de la Agencia Fish Info Service (FIS), una compañía mejicana R.G. Alimentos del Mar prevé procesar 40 Tm por día de atún fresco destinado a ser comercializado como lomos de atún con destino al mercado de la UE. De acuerdo con esta fuente, la empresa considera que "las autoridades mejicanas hicieron un buen trabajo y si no se consiguió el objetivo de bajar aranceles ello fue debido a las fuertes presiones en contra existentes en los países miembros de la UE".

Méjico, señala FIS, ha intentado siempre conseguir un arancel aduanero del 6% y en la actualidad tiene como estrategia conseguir este objetivo para el año 2002. Francia tiene antiguas y sólidas relaciones con numerosos países, especialmente en África del oeste donde existen muchas fábricas de conservas controladas por capital francés. La industria española por su parte, ha desarrollado y continua fortaleciendo lazos con varios países del área SPG-drogas de América Latina.

Constatados estos hechos junto con la necesidad de promover el desarrollo sostenible con países en vías de desarrollo y la necesidad de ayudar a buscar otras fuentes alternativas a los ingresos procedentes de la economía de la droga en algunos países. Francia y España han apoyado el favorecer ventajas comparativas para estos dos grupos de países, incluso aún en el caso de que la relación entre las ventajas de acceso al mercado de productos de la pesca comunitaria y los proyectos de reconversión de actividades relacionadas con la economía de la droga no sea del todo clara. Sin embargo, el desarrollo del mercado del atún en muchos de estos países ha evolucionado en función de las concesiones de este acceso privilegiado y ha supuesto el crecimiento de industrias que hoy en día son muy importantes, tanto desde el punto de vista económico como social. Países que han hecho relevantes inversiones en infraestructura en el sector del atún, si no fuera por estas ventajas hubiesen visto evaporado su desarrollo económico, desarrollo al que han contribuido de forma evidente la UE.

Por otra parte, en el transcurso de las negociaciones que condujeron a la aprobación de las nuevas disposiciones sobre los mercados, se manifestaron numerosas posiciones divergentes entre las que hay que señalar, especialmente, a la industria italiana que favorecía una posición de más fácil acceso al mercado comunitario para los lomos de atún procedentes de países terceros.

Como respuesta a estas presiones, la Comisión en su propuesta original sobre la normativa de mercados propuso un cambio radical del régimen hasta ese momento existente que consistía en reemplazar el sistema de contingentes por un nuevo sistema basado en la suspensión total o parcial de los derechos aduaneros por un período indefinido para los productos que constituyen las materias primas destinadas a las industrias de transformación. Entre estos productos, se habrían incluido los lomos de atún que se habían tratado hasta entonces como materias primas.

En su propuesta la Comisión consideraba que el mercado comunitario estaba caracterizado por un déficit sustancial en estos productos, y que la suspensión de derechos de aduana sería la mejor solución, dado que evitaría tener que fijar cuotas cada año.

Sin embargo, esta orientación fue abandonada tras los argumentos expuestos por España, Francia y el propio Parlamento Europeo.

El compromiso final de una cuota arancelaria de 4000 T de los lomos de atún a partir de 2001 a finales de 2003 a un tipo reducido del 6% parece difícil de objetar. Sin embargo, aunque la discusión está por ahora cerrado es demasiado pronto para poder evaluar los efectos de la decisión, y por otra parte hay que tener en cuenta que el sistema tiene que ser reexaminado en el 2004. En su momento, trabajamos desde el PE en el logro de esta solución y ahora nos corresponde hacer su seguimiento. Nuestra pregunta escrita E-1155/01 trata precisamente de conocer los resultados hasta el momento de este contingente. La respuesta de la Comisión ha sido desconcertante al señalarnos que no nos puede transmitir ninguna información al respecto por ser confidencial, razón por la que seguiremos insistiendo con todos los argumentos a nuestro alcance para obtener dicha información.

En el origen de este debate está por supuesto la demanda creciente por parte de los conserveros italianos de un suministro adecuado de lomos de atún a un precio razonable. No es ningún secreto que esta postura es debida a los altos costes de producción en Italia. Italia sostuvo en el debate una posición favorable a la importación de lomos de atún mejicanos al mercado europeo a precios competitivos y con derechos arancelarios más reducidos. Sin embargo, esta posición no prosperó debido, entre otras, a las presiones de los numerosos países beneficiarios de sistemas de preferencias aduaneras y al régimen estricto que existe en la Comunidad para el control del origen y calidad de los productos importados y al papel que jugamos, todo hay que decirlo, desde el PE.

ORIGEN Y CALIDAD DE PRODUCTO

Es manifiesto que en la Unión Europea, no existen procedimientos efectivos para identificar con precisión el origen de las materias primas y de los productos de la pesca importados. Esta situación supone en numerosas ocasiones una circunstancia que falsea la competencia en el marco de la industria comunitaria, como tuvimos ocasión de señalar ya en nuestro Informe del PE.

La reglamentación comunitaria primigenia señalaba como país de origen de un producto a aquel en el que se llevaba a cabo la última operación de transformación, mientras que el reglamento 693/88 amplió las reglas de origen para que se pudiese considerar como producto de un país aquel que hubiese sufrido alguna manipulación en el proceso de transformación del mismo. Sin embargo, en el supuesto de productos enlatados, la normativa señala que solamente pueden considerarse productos originarios de ese país aquellos productos elaborados con pescado o marisco proveniente del mismo.

Sin embargo, este concepto se ha ampliado de tal forma que por ejemplo, atún en conserva originario de Turquía puede ser ahora importado a la UE bajo un régimen de libre acceso gracias a las disposiciones del acuerdo de asociación, lo que es sorprendente, dado que este país no pesca atún por lo que la materia prima en cuestión es difícil de comprender que pueda ser contemplada como proveniente de este país.

Esto se produce porque las disposiciones comunitarias permiten que productos de origen comunitario destinados al mercado de la transformación que se elaboren en Turquía puedan ser considerados de origen turco; este es el supuesto de la "acumulación bilateral" ocurrida en el procesamiento. Un producto que proviene de la UE no pierde su consideración de origen pero adquiere una situación adicional que le permite a su vez originario del país donde se trató cuando vuelve al territorio de la UE.

La aplicación de tal sistema es técnicamente muy compleja. Requiere una gestión muy complicada que es muy difícil y es casi imposible de efectuar un seguimiento y control adecuado de las diferentes fases del proceso.

Esta situación, además supone un tratamiento muy injusto para los productores comunitarios a los que les es muy difícil comprender como es su propia materia prima puede volver al mercado comunitario a precios mucho más bajos de los que resultan esos mismos procesos en la Unión.

En lo que respecta a la calidad de los productos, hay que considerar que el consumidor europeo exige unos altos niveles de calidad y de salubridad de los productos que acceden al mercado. La Unión Europea ha respondido a estas preocupaciones mediante el establecimiento de unas normas muy estrictas para garantizar la calidad de los productos pesqueros. El cumplimiento de normas muy estrictas para garantizar la calidad de los productos pesqueros. El cumplimiento de esta normativa de promoción de la calidad, exigen a la industria comunitaria unas inversiones que repercuten en una elevación de costos, que muchas veces hacen que los productos comunitarios sufran desventajas competitivas con respecto a productos provenientes del mercado exterior.

La industria conservera en la Comunidad, por ejemplo, ha hecho esfuerzos importantes para modernizarse y para adaptarse a los requisitos sanitarios comunitarios establecidos en la Directiva 493/91, así como a las disposiciones pertinentes contenidas en las directivas que regulan las condiciones de producción, control de calidad y gestión ambiental.

En pocas palabras, la industria europea debe utilizar la calidad para intentar superar la amenaza que supone la competencia de productos provenientes de países terceros, pero para que sus esfuerzos sean coronados con el éxito es necesario que las disposiciones de control de calidad aplicadas a productos provenientes de terceros países sean aplicadas correctamente garantizando la libre competencia.

La necesidad de disponer de un laboratorio de referencia nivel comunitario

Como ya destacábamos también en el Informe del PE, no hay calidad sin control. Las condiciones técnicas y sanitarias tienen que ser científicamente verificadas por una red comunitaria de laboratorios de referencia cuya misión es garantizar que se observan en el proceso de transformación de productos de la pesca y del marisqueo, la normativa comunitaria. Estos productos, teniendo en cuenta sus especificidades naturales, las peculiaridades que hay que observar en su elaboración están sometidos a una normativa específica, diferente a la que es aplicable, por ejemplo, a la carne o a los vegetales. La directiva 91/493/CEE (Anexos-Capítulos IV y V) exige que se lleven a cabo controles especiales en las materias primas en estado fresco, análisis sobre parásitos, sobre sustancias químicas (nitrógeno e histamina) y análisis sobre contaminantes en el medio ambiente acuático. Estos controles tienen que ser llevado a cabo en el laboratorio del establecimiento o en cualquier otro laboratorio especializado.

El control de calidad y la protección de los consumidores exigen que los mismos controles sean llevados a cabo tanto para los productos elaborados en el mercado comunitario como aquellos provenientes de países terceros y que son importados al mismo, en los que no existen garantías de que estas exigencias han sido observadas en el mercado de origen. Si este tratamiento no discriminatorio no es escrupulosamente observado se corre el riesgo de falsear la competencia, distorsionando las normas del mercado penalizando la producción comunitaria.

La no observancia de los controles de calidad exigibles tiene una repercusión no solo sobre los precios sino, lo que es más importante, sobre la seguridad y sobre la salud humana.

Como consecuencia de la investigación científica reciente y financiado por UE en la Universidad de Santiago de Compostela y del Instituto de Investigaciones Marinas, en Vigo, se ha desarrollado una técnica, basada en biología nuclear y el análisis de ácidos nucleicos, para determinar vía DNA si un pescado

enlatado realmente pertenece o no a las especies indicadas en la etiqueta. Los análisis llevados a cabo en varios países han sugerido que hasta del 30% de las etiquetas puedan ser erróneas, especialmente en el caso del atún (gracias a la proliferación de especies); esto tiene efectos obvios en términos de calidad, precio y fraude del consumidor.

Es por lo tanto esencial emprender la cooperación a nivel europeo en el campo del análisis de laboratorio, estableciendo un laboratorio comunitario de referencia para la cooperación, la aprobación y la certificación analítica, que funcione como la garantía última de calidad y la protección sanitaria y técnica para el consumidor europeo.

La calidad y las condiciones técnicas y sanitarias necesitan ser supervisadas científicamente por laboratorios especializados, imponiendo los mismos controles sobre productos importados como sobre productos europeos.

Situación del sector de la conserva del atún comunitario

El mercado de conservas de atún europeo está creciendo actualmente un 7% por año, con un consumo anual actual de 550.000 T. De éstas, 310.000 T, o el 60% de los suministros, se enlatan en la UE, predominantemente en España, Italia y Francia. Existe un gran intercambio comercial dentro de los países de la Comunidad, en el sector de las conservas de atún que está creciendo a un ritmo de un 30% anual. España y Francia son los mayores exportadores; sus productos van principalmente al mercado italiano y norte de Europa. Los principales proveedores de la industria siguen siendo la flota de la UE (España y Francia principalmente) entre ellos contabilizando un 15% de los desembarcos globales.

La industria conservera de los productos pesqueros en la Unión Europea es un sector intensivo en mano de obra, en la que todavía se siguen, en gran parte, procesos manuales con objeto de salvaguardar la calidad del producto. Esta industria está integrada por 50.000 empleos directos y unos 25.000 inducidos en el territorio de la Unión. Estos empleos están muy localizados, principalmente en las regiones periféricas. De las 20.000 personas empleadas en la industria conservera española, 13.000 viven en Galicia y alrededor del 70% son mujeres. La importancia que esta industria tiene para la economía regional se pone de manifiesto en el hecho de que Galicia representa el 70% del valor y el 75% del volumen de todos los pescados y mariscos enlatados producidos en España.

El atún representa aproximadamente el 60% de los productos alimenticios marinos enlatados, gran utilizador de mano de obra y la industria conservera de atún es como tal, el sector comunitario más importante de la industria conservera, tanto en términos de empleo como en volumen de negocio. El empleo es una de las prioridades de la Unión, por lo tanto la promoción de industrias que tienen un gran impacto en las economías locales tienen que ser objeto de especial atención ya que contribuyen a crear empleos estables, a evitar la deslocalización y, en general, a preservar el tejido económico y social de las regiones de la Unión.

Conservación de los recursos y aspectos medioambientales

El atún es un producto que tiene un mercado global que se comercializa a nivel mundial, cuyos aprovisionamientos provienen de unas flotas que también operan a nivel mundial.

Esta característica, la globalización del mercado del atún, puede implicar en algunas ocasiones, que por exceso de oferta o por defecto de la misma se produzcan crisis en mercados locales. Esta situación puede implicar considerar daños o incluso provocar la desaparición de sectores locales muy sensibles que deberían ser mantenidos por razones no estrictamente económicos sino más bien sociales para evitar la desertificación industrial de áreas litorales o la quiebra de la cohesión económica y social de algunas economías locales.

Sin embargo, las corrientes de mercado no pueden ser de todo punto ignoradas por lo que hay que establecer un equilibrio entre los enfoques comerciales y aquellas exigencias que implican la cohesión económica y social. Asimismo, hay que tener en consideración aspectos tales como la conservación de los recursos, la preservación del medio ambiente marino, la gestión racional de las pesquerías, elementos que habrá que tener en cuenta a la hora de adoptar una política de apoyo al sector. La estrategia comunitaria tiene que combinar estos elementos, no solo desde un aspecto nacional de cada Estado miembro sino desde una óptica a nivel comunitario.

Por otra parte, a la hora de establecer estrategias también hay que tener en cuenta que la UE como tal tiene un interés prioritario en alentar el cumplimiento del Derecho Internacional del Mar tal como se recoge en el código de conducta de la FAO para la pesca responsable, la Convención de las Naciones Unidas sobre el Derecho del Mar de 10 de diciembre de 1982 y el llamado Acuerdo de Nueva York para la aplicación de las disposiciones de la Convención de las Naciones Unidas sobre el Derecho del Mar relativas a la conservación y la gestión de las poblaciones de peces cuyos desplazamientos se efectúan tanto dentro como fuera de las zonas económicas exclusivas, poblaciones transzonales y de peces altamente migratorios, adoptado el 4 de agosto de 1995.

Por último, también hay que señalar el creciente e importante papel que juegan en la gestión de las pesquerías las Organizaciones Regionales de Pesca que constituyen un instrumento eficaz en la prevención de los conflictos y la lucha contra fenómenos indeseables como la sobreexplotación de los recursos, la pesca efectuada bajo pabellón de conveniencia o por navíos sin abanderamiento, que en la mayoría de los supuestos operan en estas condiciones para eximirse de la observancia de las normas que deben regir la pesca responsable.

CONCLUSIONES

El mercado único europeo, en su contexto global permite a la vez nuevas posibilidades y por otro lado lanza nuevos desafíos a la Industria Atunera de la Unión Europea.

La Organización común de mercado tendrá, por su parte, que aprobar mecanismos precisos y eficientes para mantener el equilibrio del mercado interior. Un mercado estable, exige "partenariado" entre productores y la industria de transformación, con un uso mayor de contratos a largo plazo entre productores y sus organizaciones y las empresas de transformación, ayudando de esta manera a asegurar el abastecimiento necesario.

La Organización común de mercado debe extraer todas las máximas ventajas posibles que ofrece el mercado interior y estimular y desarrollar el comercio actual en su seno para aprovechar el potencial real que existe para incrementar el consumo de atún.

El futuro nos deparará también nuevos desafíos. Para el año 2004 y en adelante, será preciso prestar particular atención a la organización de las más importantes corrientes de comercio del atún y especialmente a la evolución de los sistemas de los que depende y habrá que estar atentos a la evolución de la política contingentaria europea de lomos de atún.

Se producirán cambios inevitables derivados de la siguiente etapa de la Organización común de mercado, de las continuas discusiones en el marco de la Organización Mundial del Comercio, del desarrollo de partenariados económicos regionales en el seno del grupo ACP y de la reforma del Sistema de preferencias generalizadas (SPG-Droga).

Todo esto forzará inevitablemente cambios en la industria comunitaria del atún, que probablemente no podrá soportar costes tan altos de producción. Es probable que se produzcan nuevos intentos de incrementos a medio plazo de importaciones de productos semielaborados para los productores con altos costes de producción lo que generará nuevas tensiones en la competencia interna de la industria europea.

Por otra parte, la actividad pesquera, incluida la industria de la conserva no puede ser tratada desde un enfoque estrictamente económico en el que solo prime el puro intercambio de mercancías. La pesca y la industria conservera contribuyen en gran medida a la cohesión económica y social del tejido industrial de las zonas costeras en las que constituye un elemento esencial de la vida de las mismas.

El apoyo a esta actividad industrial tiene que estar fundado en la garantía de unos abastecimientos de materias primas adecuados tanto en productos frescos como congelados observando el principio de preferencia con respecto a los productos provenientes de la flota comunitaria y diseñando una política de importaciones que tenga la suficiente flexibilidad para adaptarse a las necesidades del mercado, de tal forma que nuestra industria pueda ser viable en el marco de una real y libre competencia.

El futuro de la industria del atún comunitario, teniendo en cuenta el continuo crecimiento de la demanda, muestra grandes expectativas y su éxito, sin desconocer su importancia, no estará basado exclusivamente en estrictos criterios de costes sino que dependerá mucho del mantenimiento y perfeccionamiento de los altos niveles de calidad que tienen sus productos y del desarrollo por parte de las autoridades comunitarias de una política que les asegure unas condiciones de igualdad en relación a los productos, provenientes de mercados externos. Queda todavía mucho por hacer en este campo en las políticas de la UE y, como señalábamos en nuestro Informe del PE, siguen siendo necesarias campañas europeas de promoción de los productos de nuestra industria conservera.

En la configuración del futuro del sector tendrá que concederse especial atención al papel que la UE tiene que jugar en la Política Exterior Pesquera. El mantenimiento y posible incremento de la red de acuerdos pesqueros internacionales, las Organizaciones Regionales de Pesca, organizaciones en las que la UE tendrá que tener una participación activa y acorde a la importancia que como potencia pesquera mundial ostenta, proponiendo la creación de nuevas ORPs y concediendo especial atención al bloqueo de acceso al mercado comunitario de aquellos productos pesqueros que hayan sido obtenidos infringiendo las disposiciones aprobadas en estas ORP para favorecer la pesca responsable. Por último, también hay que señalar que no se puede conceder ninguna facilidad de acceso privilegiado al mercado comunitario a productos pesqueros cuyo bajo coste deriva de haber sido producidos en condiciones de dumping social.

Finalmente y como destacábamos también en nuestro Informe del PE, la UE tiene que adoptar una política más rigurosa de control del origen de los productos y de sus condiciones técnicas y sanitarias para evitar fraudes al consumidor europeo y competencia desleal a la industria comunitaria.

“REFORMAR LA POLÍTICA COMÚN DE PESCA”

DÑA. ROSA MIGUÉLEZ RAMOS

VICEPRESIDENTA DE LA COMISIÓN DE PESCA
DEL PARLAMENTO EUROPEO

La Comisión Europea presentó en marzo su Libro Verde para la reforma de la Política Común de Pesca, paso previo a la reforma de los Reglamentos prevista para el próximo año, Reglamentos que deberán entrar en vigor en enero de 2003. La comisión de Pesca del Parlamento Europeo me ha designado ponente para realizar este importante informe.

La celebración, dentro del marco del “Foro internacional de conservación de productos de la Pesca”, de la “II Conferencia Europea del Atún”, representa una magnífica ocasión para adelantarles las bases del documento que estoy elaborando, ahondando en aquellos aspectos que más puedan interesarles a ustedes.

La primera consideración de mi informe hace hincapié en el hecho de que la pesca constituye uno de los escasos sectores en los que existe una política sectorial comunitaria consolidada, que es conveniente mantener y perfeccionar para que la Unión Europea pueda hacer valer su peso e influencia en un sector económico que opera a nivel mundial.

La segunda, no menos importante, incide en la necesidad de una Política Común de Pesca que garantice la viabilidad de un sector económico estratégico para la Unión Europea, por cuanto contribuye al abastecimiento alimentario, al empleo y a la cohesión social y económica de las regiones periféricas y litorales de la Unión.

La tercera, y sé que muchos de los asistentes a este foro han acudido a las jornadas organizadas en Bruselas por la Comisión Europea para debatir el Libro Verde, es que, si bien la Política Común de Pesca tiene que tomar en cuenta otros elementos, como el medio ambiente, la seguridad, la salud y la protección de los consumidores o la política de cooperación al desarrollo, la integración de éstos no puede poner en peligro el objetivo de la PCP: el desarrollo de una actividad comercial, la pesca, y el mantenimiento del empleo y de las condiciones de vida de los profesionales del sector.

Nadie duda de la necesidad de reformar la Política Común de Pesca dadas las importantes transformaciones a las que el sector pesquero comunitario se ha visto confrontado en estos últimos años: la aparición de las nuevas tecnologías, el desarrollo de la llamada nueva economía, el fenómeno mundializador que lleva camino de convertir a nuestro planeta en una aldea global en la que las distancias importan cada vez menos. Una PCP con más de veinte años de antigüedad, diseñada para una Europa de 9 Estados miembros, no es adecuada para afrontar el día a día, y aún menos para diseñar el futuro, de un sector que sostiene una parte importante del empleo y de los intercambios económicos europeos.

Todos esperábamos con impaciencia la aparición del Libro Verde. Confiábamos en que la Comisión Europea sería la primera interesada en hacer un buen documento, que plasmase con rigor los problemas denunciados por el sector a lo largo de estos años, y apuntase soluciones posibles y realistas, desde el punto de vista técnico y desde el punto de vista político. Nuestros deseos no se vieron cumplidos. La Comisión optó por un documento enunciativo, y no resolutivo. Su lectura por parte de un profano le llevaría a concluir que la desaparición sería la mejor solución para la pesca europea.

¿Cómo explicar si no las afirmaciones de la Comisión que, capítulo tras capítulo, parece empeñada en explicar el fracaso de la PCP actual no a cuenta de los errores cometidos y de la mala reglamentación,

sino más bien por oscuras razones de índole cuasi mística? ¿Cómo entender que el capítulo dedicado a la dimensión internacional de la PCP se abra afirmando que *"la política actual debe adaptarse a la evolución de la coyuntura y hacer frente a nuevos desafíos, como la aparición de nuevos agentes económicos, la aspiración legítima de muchos países en vías de desarrollo a potenciar su sector pesquero y los requisitos que imponen un desarrollo sostenible y una pesca responsable"*?

No necesito recordar, en este foro, que el sector pesquero comunitario opera a nivel mundial. Y que si algo esperábamos de la reforma era entre otras cosas el refuerzo de la vertiente exterior de la PCP, tanto en lo que afecta a la flota extractiva (acuerdos internacionales pesqueros y organizaciones regionales de pesca) como en lo referente a los intercambios comerciales.

Y que es esta dimensión exterior de la PCP la que debe ser abordada con decisión por la Comunidad, integrando acuerdos internacionales y ORP, y vinculándola a la política internacional de la Unión, en interés de nuestra flota comunitaria. Porque las relaciones internacionales de la Unión en materia de pesca tienen que ser contempladas desde una óptica primordialmente comercial, de obtención de posibilidades de capturas para una flota comunitaria cuyo objetivo es abastecer un mercado en continuo crecimiento.

Y aunque parezca extraño, somos nosotros los que tenemos que recordar a menudo a Bruselas las conclusiones del Consejo de octubre de 1997 sobre la política de acuerdos de pesca con países terceros, reconociendo las ventajas socioeconómicas que obtiene la Comunidad de los mismos así como la importancia estratégica de la presencia de nuestras flotas en aguas de terceros países, y consagrándolos como un elemento esencial de la política común de pesca.

Nosotros entendemos que la PCP ha nacido para apoyar un sector económico estratégico para la Comunidad, el pesquero, que contribuye al abastecimiento alimentario y que resulta vital para el empleo y la cohesión económica y social de sus regiones periféricas. Tengo que decir, sin embargo, que la Comisión no parece pretender, a juzgar por el Libro Verde que ha presentado, poner al día su política pesquera, reformarla, corregir sus disfunciones y contradicciones. Dicho más claramente, la Comisión Europea no apoya al sector económico pesquero.

A mi modo de ver, la reforma de la PCP habrá de tener presentes los intereses de la industria de la transformación como los de la flota extractiva, en su doble vertiente: una, correspondiente a la pesca de altura y gran altura, que debe tratarse desde un enfoque de actividad comercial destinada a abastecer al mercado comunitario de las materias primas que solicita y otra, correspondiente a la pesca costera artesanal, cuyo enfoque prioritario es el mantenimiento de la actividad socioeconómica de las regiones altamente dependientes de la pesca.

Somos conscientes de la escasez de los recursos marinos. Pero los estudios científicos deberían precisar mejor el estado de los stocks por especie y por caladero. Y la Comunidad debería promover una producción de calidad y restringir la pesca no destinada a consumo humano, como la que se utiliza para la producción de harina y aceites de pescado, que emplea cantidades ingentes de pescado. El desarrollo incontrolado de estos usos está afectando al equilibrio de los recursos, tal como muestra la crisis que están sufriendo especies otrora abundantes como el bacalao o la merluza, fuertemente afectadas en su cadena alimenticia.

Las organizaciones regionales de pesca revisten una importancia creciente como mecanismos de gestión del medio marino y de los recursos situados en las zonas económicas exclusivas y en alta mar. Considero que la Unión tiene que participar en todas las organizaciones regionales de pesca existentes o que en el futuro se constituyan. Y para ello la Comisión tiene que cambiar sus actuales planteamientos a la baja, y contar con recursos humanos y materiales suficientes para defender con eficacia los intereses de las flotas comunitarias.

Considero oportuno que la Comunidad favorezca la constitución de empresas mixtas con terceros países, ya que se han revelado como un mecanismo muy útil para la consecución de un interés mutuo, el

desarrollo del sector pesquero local, contribuyendo al mismo tiempo al aprovisionamiento del mercado y al mantenimiento de la flota comunitaria.

Pero sería un error analizar la actividad pesquera comunitaria únicamente desde un prisma puramente económico, de intercambio de mercancías. La pesca en la Unión Europea tiene un carácter multifuncional, contribuye a la integración del tejido social y económico de la franja litoral, constituyendo un estilo de vida y un factor de cohesión en amplias comarcas costeras, y garantizando un abastecimiento alimentario de calidad; el gran reto para la reforma de la PCP es justamente lograr un equilibrio entre la gestión de los recursos, la rentabilidad económica y el mantenimiento del tejido social en las comarcas pesqueras.

Respecto a la flota, los programas de orientación plurianual, cuyo objetivo es lograr un equilibrio entre los recursos disponibles y el esfuerzo pesquero, no han dado los resultados esperados, en gran parte por falta de voluntad de algunos Estados miembros en aplicarlos correctamente. La Comunidad debe replantearse el régimen sancionador si desea evitar estos incumplimientos y dar credibilidad a los POP. Los POP siguen siendo necesarios para la modernización de la flota, reforzando los aspectos de seguridad y habitabilidad, que no tienen por qué presuponer un aumento del esfuerzo pesquero.

La Política Común de Pesca del futuro deberá estar basada en una gestión común de los recursos para una flota que podrá operar bajo un mismo pabellón, bajo control comunitario. Su integración en el mercado único como una verdadera política comunitaria exige un tratamiento en condiciones de igualdad, no discriminatorio, aplicable a todos los profesionales del sector. No se sostiene que el solo elemento unificado en la pesca europea sea el mercado. Y que sea el sector pesquero español el gran pagano de esta situación.

Por lo que se refiere al sector de la transformación, nosotros entendemos que debe ser una pieza fundamental de la PCP reformada. Su importancia cada vez mayor, su vocación de futuro, su ligazón con preocupaciones ciudadanas como la seguridad alimentaria, le confieren una dimensión cuasi estratégica. Por ello entendemos que la Comunidad deberá reforzar el apoyo a este sector industrial, garantizándole el acceso al aprovisionamiento de las materias primas necesarias para la elaboración de sus productos.

La Comisión debería ofrecer a la industria europea del transformado de pescado posibilidades para asegurar su suministro a través de la flota extractiva comunitaria, complementada con importaciones de materia prima de calidad y a precios internacionales. La Comisión tendría que desarrollar campañas específicas destinadas a promover los productos comunitarios, tanto conservas tradicionales como nuevos productos, difundiendo la calidad de los mismos a través de la creación de denominaciones de origen propias o del establecimiento de etiquetas comunitarias otorgadas por organismos independientes bajo control público.

No hay que olvidar la importancia estratégica de este sector para la creación y el mantenimiento del empleo en regiones europeas altamente dependientes de la pesca, particularmente por lo que se refiere a la mano de obra femenina, que representa un porcentaje muy elevado.

Por lo que se refiere a los intercambios de productos pesqueros y a la definición de la política comercial de la Unión Europea en este sector, sostengo en mi informe la necesidad de tener en cuenta los siguientes principios:

- respeto del principio de preferencia comunitaria;
- constatación de la necesidad de realizar importaciones masivas para satisfacer la demanda creciente de productos de la pesca destinados al consumo humano, junto a la existencia de un sector extractivo y transformador cuya protección requiere el mantenimiento de algunas limitaciones específicas al régimen de comercio comunitario aplicable a los productos sensibles;
- adopción de un enfoque global en las negociaciones comerciales, de tal forma que no se contemplen exclusivamente los aspectos de reducción arancelaria sino que se tomen en cuenta otras cuestiones

de importancia creciente para la Unión, como el derecho de establecimiento y de realización de inversiones en países terceros, el libre acceso a sus puertos y las acciones contra los pabellones de conveniencia.

—la liberalización de los intercambios en el sector pesquero habrá de realizarse sin efectuar concesiones respecto a los estándares medioambientales y a las condiciones sanitarias y de seguridad alimentaria que rigen en la Unión Europea.

Por lo que se refiere a la acuicultura, parte integrante de la política común pesquera, constituye un complemento de la actividad extractiva que exige una particular atención y desarrollo, y que contribuye de modo importante a la creación de empleo y al aprovisionamiento del mercado comunitario. Pero la acuicultura sólo es tratada parcialmente por la PCP, en lo que se refiere a la aplicación de las normas relativas a las políticas de estructuras y de mercado, y no en cuanto a la ordenación de la producción y del sector, que es competencia de los Estados miembros. Considero necesario ampliar el marco normativo comunitario para posibilitar el desarrollo de una acuicultura sostenible para el medio ambiente, el empleo y la viabilidad económica.

El sector atunero participa en todos los ámbitos propios de la Política Común de Pesca. La Comunidad Europea es uno de los principales mercados mundiales de este producto, tanto en fresco como transformado. Nuestra flota captura una cantidad importante pero insuficiente, por lo que debemos importar del exterior materia prima que ha de estar en conformidad con los controles sanitarios, procedente de países que se benefician de un régimen de preferencias generalizadas. Y faena al amparo de acuerdos internacionales o en organizaciones regionales de pesca, bajo una gestión inteligente de los recursos, aunque ha de competir con buques con bandera de conveniencia. Existe en la Comunidad una importante industria de transformación de productos del atún, que emplea abundante mano de obra. Así como una cada vez más abundante producción acuícola, destinada a paliar las carencias de la flota extractiva.

En resumen, todos los capítulos de la PCP interesan al sector atunero y cualquier medida que se adopte en uno de ellos afecta a los restantes. Por ello es difícil encontrar un equilibrio entre productores e importadores, entre flota extractiva e industria transformadora. Difícil, pero posible. Sin embargo, hay quienes parecen optar por el abandono del sector. De todo el sector pesquero. El derrotismo del Libro Verde, acompañado de preocupaciones centradas en la cooperación al desarrollo y discursos de organizaciones medioambientalistas, va en esa dirección.

La Comisión ha de velar por los intereses de la flota atunera comunitaria, trabajando por hacer respetar sus derechos históricos en caladeros internacionales. Siempre he dicho que el sector pesquero comunitario es, en su mayoría, económicamente viable, y que a las distintas administraciones compete velar por esta viabilidad. Las normas que rijan la PCP han de ser tomadas tras una amplia participación de los profesionales, y buscando la satisfacción de los intereses de las distintas ramas del sector pesquero.

Europa se encuentra en una encrucijada. Surgen las contradicciones entre los que deseamos una unión política (Europa comunidad) y los defensores de un simple mercado (Europa espacio), entre los partidarios del procedimiento comunitario y los que abogan por la mera cooperación intergubernamental, entre los que deseamos abrirnos al mundo a través de Europa y los defensores de imposibles soberanías locales en un mundo cada vez más globalizado. La pesca no es un sector aislado ni está situada en la estratosfera. A la pesca le afectan todas estas cuestiones, y las distintas propuestas para la reforma de la Política Pesquera Común ponen de relevancia intereses muy concretos.

La oportunidad de realizar este informe me cautivó desde el primer momento. Si luché por conseguirlo fue con la esperanza de que la voz del sector, la voz de Galicia, se escuchase con fuerza en Europa en un asunto que nos afecta tanto. Pero de nada servirán nuestros esfuerzos si los responsables gubernamentales no se deciden a asumir el liderazgo que a nuestro país corresponde por derecho propio. No dejemos pasar esta oportunidad de incidir en la reforma de una política común en beneficio de un sector pujante y competitivo, pero con evidentes fragilidades, que clama porque se le atienda.

Bruselas, 17 de julio de 2001

PONENCIA / *SESSION*

2

**EL ATUN EN LA NUEVA ECONOMÍA: INNOVACIONES
TECNOLOGICAS RELATIVAS A LA PESCA,
TRANSFORMACION Y COMERCIALIZACION DEL ATUN
*TUNA IN THE NEW ECONOMY: TECHNOLOGICAL
INNOVATIONS RELATED TO FISHERIES, TUNA
PROCESSING AND COMERCIALIZATION***

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THE APPLICATION OF INTERNET IN INTERNATIONAL TUNA BUSINESS

MR. HENK BRUS

MANAGING DIRECTOR WWW.ATUNA.COM

During this past year, there have been great promises given by management gurus, consultants, software companies and many others. Promises about how Internet would change the world, and about how the "New-Economy" would wipe out traditional business. Well, the Internet hype is over and the bubble has burst. I wish to take a look, together with you, at how the application of Internet Technology in Tuna Business is working today, what the future might bring, and how to deal with it.

Internet and Globalization

Internet and globalization are often mentioned together. Tuna is really a global specie, and has become truly a global commodity. It is caught and traded almost everywhere around the globe, and produced at many (often remote) locations. Distribution of raw and also processed tuna products has become a worldwide activity. It's the world second largest traded seafood commodity, shrimps being number 1. Raw materials and finished products are being distributed over long distances. Most leading tuna traders, processors and fishing companies have developed trading offices, production facilities, cold-storages, and fishing locations all over the world.

Hyper-transparency

Internet is making the world a smaller market place. Frequently I receive emails from tuna professionals who tell me what dramatic impact the Internet has already had on their daily business. Nowadays, small tuna fishing companies, in even the most isolated regions, are daily informed -via the Internet- about what the supply and price developments are in Bangkok or Manta. They get knowledge for next to nothing. This is creating a hyper-transparent market.

Price deflation

While the Internet offers enormous advantages in access to know-how, cost cutting and efficiency, it will unfortunately also have a price deflating impact. This sadly means that margins on tuna are bound to continue to fall in the future.

Current State

Because of its large scale and big companies, the US is clearly ahead in applying Internet to the business process. Its market shows what might be in store for us. So far, B2B exchanges within the seafood sector have not been greatly successful. Several have recently shut down. However supply

chain management projects using the Internet, developed by hundreds of different companies, are highly effective, and continue to generate great efficiencies and savings.

Around the world and over the last year, several E-Commerce projects have been launched, in many different forms. Atuna is probably the clearest example in international tuna business. PEFA.com in Belgium is often mentioned at the most successful Seafood exchange. This company converted the conventional fish auctions in the Benelux into one digital trading platform. But also many more general, and local orientated B2B exchanges have started over the last 2 years. In Thailand several canned tuna suppliers have allied themselves to Foodmarketexchange. In Japan fresh and frozen tuna traders and distributors have joined FIS, on a purely Japanese E-commerce platform. In America, via several seafood exchanges, mostly fresh tuna for the local market is offered on an irregular basis. The next speaker will explain to you about a new interesting project to start in Spain. Then there are many, still very small-scaled, tuna trading activities scattered over dozens of general B2B exchanges all over the world.

Overall it is estimated that the seafood volume traded on-line is well below 2% and therefore not yet significant compared to the traditional trade.

Over the last year most common users of these B2B exchanges consisted mostly out of:

- Small new companies, instead of already established ones
- New supply countries, instead of long time supply sources
- Often new innovative products vs traditional
- Fresh/Frozen tuna, more than canned/pre-cooked loins
- New markets and niches vs existing channels
- More sellers than buyers

Challenges

The Internet brings many challenges to our companies. How to deal with these innovative developments, we could perhaps learn from the past.

A pair of economists at Goldman Sachs studied the process of electrification at the beginning of the 20th century. Their most remarkable finding was the impact of the electrification on the companies who re-wired their factories and re-designed and adjusted their processes to take advantage of this new electric technology. Their efficiencies were up, but they were forced to pass their savings on to their customers. Instead of using them to boost their profits. Nevertheless they survived and companies who stuck to steam power too long, perished.

It is likely that the same mechanism will apply to our tuna business.

Email

Within the last year, 85% of tuna professionals switched most of their communication to email, a revolutionary development in business communication. It has become an incredibly powerful tool. As an example: E-mail enables our company to reach and inform thousands of tuna professionals all over the world within seconds, at almost no costs. E-mail success shows us the best example of how fast things can change once they gain momentum, and what advantages Internet offers. A good illustration

of the effect of email has probably been the case of the WTPO. Several global emailings on their resolutions have strongly influenced global tuna market movements.

But developments will not stop here. Next to come is the phase in which we will see strong advances in the area of E-trading and E-supply chain solutions.

Examples of Efficiencies and Changes

- Fishing –through a combination of Internet and satellite technology, there will be great advancements in fish spotting, and decision– making about what commercially the best port of discharge is. Bringing great savings in fuel costs, less days in port, improved fleet maintenance management and communication. Fish can be sold through on-line bidding to a wider group of buyers, prior to sailing, or while still at sea. Thus offering fishermen more options, and less dependency.
- Logistics –Internet can– per example- give fisherman, traders, processors and distributors immediate access to information about the availability, planning and the location of reefer carrier capacity. More transparency in this sector could erode the function and dominance of traders, and bring supply and demand even more closely together.
- Marketing /Sales – Leading Tuna brands can invite on-line bids for toll packing agreements. Supermarket chains, and Food service groups might auction their total canned tuna requirement.
- Processing – E-procurement can lead to improved efficiencies for canneries in contracting raw fish directly from tuna boat owners, even when they are in more distant waters. Also the purchase of a packaging material such as tinplate offers opportunities.

A Perfect Market?

Will all these just mentioned developments create a perfect tuna market? A perfect tuna market continues to be a utopia. However, B2B exchanges and immediate access to the latest tuna market prices, supply and demand anywhere, will likely threaten to even out those imperfections of the market, which has always been the major opportunity for many traditional tuna companies. They owe a majority of their profit to the imperfect global market. Today's un-balance in the global supply and demand situation of raw tuna, offer plenty of business possibilities for traders and processors. It creates a shift in buying and supply patterns. Those who exploit these frictions best, make money.

This might explain the hesitance of most established large tuna companies to get involved in E-commerce activities on a serious scale. They are afraid that it might threaten their current position, and would work against their own long-term interest. Although this is probably true, history tells us you cannot stop progress. So traditional tuna companies will have to re-think their future strategies on new ways to create added value, and competitive advantages.

I am here today to illustrate to you what possibilities Internet offers, and what better example than to demonstrate how atuna, the only specialized tuna website, applies Internet technology in tuna trading:

What is atuna?

Atuna is a vertical E-marketplace, and an information medium, started in Sept 1998 by innovati-

ve people with years of trading experience in a major tuna import firm in Western Europe. They believed that Internet technology would bring great advances and changes to the their industry.

Vertical marketplace refers to its specialization on solely one product: Tuna. This compared to so-called horizontal e-marketplaces, which concentrate themselves on bringing together buyers and sellers of the entire seafood range. For our basic services we ask a transaction fee from the seller.

The website atuna.com was launched in October 1999, and started publishing its daily tuna market news by January 2000.

Our target group consists solely out of professionals. Companies that are directly active in the tuna sector, or in tuna-related industries or services.

Some of atuna's services are accessible to members-only, who firstly need to register. All our information on our trading website is in the English language.

Atuna b.v is privately owned and based in the Netherlands. It was created without any large venture capital check and did not have a so-called "capital burn rate". Of great importance in developing our business concept was to start thinking from our core-business, and to combine it realistically with our knowledge and experience regarding Internet technology. This way, in cooperation with IT specialists, a platform with a strong focus on the commercial and supply chain management aspects of tuna was created

Atuna's Mission

"Atuna's mission is to introduce and offer profitable, innovative, high quality, and highly efficient commercial mediation services to its customers within the global tuna business community, by applying the latest available technology in the simplest way, and against low costs".

Atuna's Internet Strategy

From the start, the objective has been first to establish a global tuna community on the Internet. Unlike other "dotcoms" (of which several have already gone down) atuna.com hardly advertised, and managed to gather a great global tuna audience purely by providing high quality information. Trust, reliability, and expertise are key words in our approach.

It has been our choice to conduct business both on-line via the Internet, as well as off-line in the traditional way by phone, email or fax. We see E-business as an addition to the traditional business negotiation process and not as 100% replacement of it. This way we have been able to identify the need of buyers and sellers first hand, and understand the problems of the day-to-day the tuna business. It also lets us generate enough earning, the traditional way, to operate with a positive financial result, and to invest in our Internet applications at the same time.

Atuna is aiming to create a win-win situation for four parties: fishermen, processors, distributors and atuna.com

A crucial element of our strategy was for us to assume a role of responsibility, and strong involvement in the commercial and supply chain management process. This to boost commercial activities and also to ensure smooth execution and fulfillment of orders concluded through our exchange.

We chose to gradually develop and implement E-business services, which are easy-to-use , cost-effective and tailored to actual needs in tuna-trading. We want to learn from the mistakes and suc-

cess of companies who pioneered E-trading and E-supply chain solutions, and thus come with the right solutions for the tuna business at the right moment.

Support Offices

In order to service buyers and sellers on a global basis, atuna has established its own support network, with offices in Ecuador, Thailand, Indonesia, Philippines and its head office in the Netherlands. This network enables the atuna team to be closely in touch with major tuna supply sources and the import markets.

The users of atuna.com

Today atuna is used by the wide range of companies who's core of business is :TUNA. Such as fishermen, processors, distributors, retailers, and equipment suppliers but also bankers/investors and government organizations.

Their motivation to visit atuna.com is often to gather market news. Information on the tuna market around the world, catches and price developments, but also to seek new suppliers and customers. Slowly but gradually we are observing an increase in making offers and inquiries on-line.

The largest share of atuna.com visitors are coming from the USA, but as you can observe from our chart all important tuna supplying nations are represented among the daily visitors.

Atuna is trading the entire range of tuna products, although there is still a strong focus on the traditionally dominant canned tuna industry.

Currently the database of atuna holds the addresses and relevant commercial information of thousands of companies directly active in the tuna business. Our marketplace counts about 1500 registered members, and more registering every day!

Tuna Trading Floor

Atuna.com offers a large group of members the possibility to take their business process on-line. On our Tuna trading-floor buyers and sellers can make inquiries and offers on-line which are then matched off-line by atuna commercial staff.

Within the password secured environment, the personalized atuna-trading floor connects your commercial and logistics process via the Internet. Contracts and detailed reports on product movement can be viewed by your staff from any location, but only when they have your security codes. Data is available 24 hours a day, there are no language nor time zone barriers. It makes information available in a much more effective way than any traditional channel, and it does not require any software investment from your side!

Keep-IT-Simple

When we designed the atuna.com tuna-trading floor, our main interest was that we wanted to keep-IT-simple. This way we have been able to take away the technological barrier for first time users. Many E-marketplaces offer highly advanced software, with a wide range of options and features. Features often too complicated for the average businessperson, who has no extensive on-line trading experience.

Auctions

The main reason why our site does not include the possibility for closed or open auctions on-line is that we experienced that the tuna trade is not ready for such features yet. In our opinion auctioning tuna on-line will gradually take off by the beginning of 2002. Some tuna companies have started experimenting with this way of open bidding already on a small scale, but no major breakthrough has been recorded yet. What you will see in the coming year is that, if one or two major tuna companies would move part of their buying or selling successfully to the Internet, an irreversible chain reaction will take place.

When the market is ready to take the next step from E-supply chain management to active on-line trading, atuna is ready to provide a trading platform based on the latest technology and fully customized to the requirements of the tuna business.

Most visited homepage in the tuna business

Besides commercial services atuna also offers a wide range of other services to its users. Our www.atuna.com homepage is the most frequently visited home page in the international tuna business, and gives you access to a wide variety of services and information.

I will give you a tour of the most important services offered by atuna.com:

Tuna market News

Knowledge is power, also in the tuna business. Information now travels faster than ever. Fast and immediate access to important data becomes more and more a crucial factor. With daily-actualized Tuna market news atuna fulfills an important need in the international tuna trade. It provides readers with a wide variety of information related to tuna, such as prices, worldwide news items, analyses and comments. News is collected through our daily commercial contacts, our support offices, and several global news services.

Atuna wants to put information in perspective, which assists tuna professionals in their daily decision making process.

Contrary to many magazines and other traditional professional publications, atuna publishes news almost around the clock. This way you do not have to read about an important development 2 to 8 weeks after it occurred, when a seafood magazine drops on your desk. The atuna news archive is very popular in use by many fisheries publications and other seafood websites as a reliable and extensive news source on tuna.

E-supply management

Atuna has developed an E-supply chain solution. We have conservatively estimated the gain of working with this Internet application between 2 and 3 percent across the entire supply chain.

The efficiencies in the use of this system are not only saving costs in communication. It is especially a cost saver in the back office. It cuts, to a very minimum, the amount of faxes and emails to be sent, as well as the time required to file them. Information is stored in a way that is easy to access, also after delivery has been completed.

An automatic email function keeps all selected partners throughout entire supply chain up-to-date on progress in product movement.

Working this way the total supply chain process becomes much more transparent to all partners involved. It also shifts the workload of your staff from time-consuming manual work to higher value decision-making. Working with this system can represent a great addition to your current commercial and logistics process.

Ask the expert

In this section, experts in tuna processing and trading answer specific technical questions from members.

Tuna boats for sale

Already several large purse seiners in this section have been sold successfully, and we feel this section offers a great potential to boat owners. Within 24 hours about the whole world knew these boats were for sale! This service is focused on less new tuna boats being built, and the existing catching capacity and boats being better utilized.

Tuna Encyclopedia

When you enter the word tuna on your Internet search engine you will get at least 1 million hits. To make browsing for important tuna related information easier and faster for you, we have selected a lot of important websites on specific tuna topics; saving you and your staff valuable time.

The "Tuna Encyclopedia" also enables companies to advertise in specific sections.

Tuna Groups

This tool provides business people the opportunity to exchange opinions, information or data and about a wide range of topics, in a simple, but very effective way. It enables per example quality assurance manager the possibility to exchange views on dealing with certain technical issues, or new regulations. It makes group information available to all group members, anywhere around world, at almost no costs. We can also administrate and provide secure, confidential discussion groups.

Import statistics

Recently we have launched a special section, which is solely dedicated to generating import statistics that are essential for management decisions. We analyze markets, and try spotting trends in catches, supply patterns, consumption and market prices.

We know that in this business there is a great need for more statistical information.

In the future this service will be largely extended, and will only be available for atuna.com paying members.

Obstacles to E-business

Shortly after the introduction of our website in 1999, atuna was confronted with serious obstacles in reaching the full potential of its E-business initiative.

We encountered a lack of technology-ready partners. Most companies located in the US, and Europe had reliable and fast Internet connections. However in most other countries, tuna professionals have been strongly handicapped by slow speed Internet facilities, and the outdated hardware and software available within their companies. This is still often the case.

Especially within frozen and fresh tuna business the level of standardization is still not sufficient to make a smooth global E-trading process possible. Real objective or clearly defined internationally recognized standards and procedures need to be developed. The WTPO could play an initiating role in this field.

Despite the explosive increase of on-line professionals and despite the fact that many tuna companies have invested strongly in Internet connections, there is still a lack of sufficient virus protection within many companies' computer-systems. This often obstructs the smooth development of E-business activities.

When we introduced atuna.com, we encountered a great skepticism within the traditional business segment. Initially people were confused, or in denial about what Internet services could mean to the future of their company.

I believe that now we have come to the stage that a realistic view has started to emerge. Tuna buyers and sellers all around the world have come to accept the importance of the web for their company's future and have started positively questioning what it can do for them.

What will be the role of Internet applications in the future of the international tuna trade?

People will continue to fulfill a key position in the business decision-making process. Their specialist know-how and expertise will become even more critical competitive factors. However, they will be confronted with changes at an ever faster rate. This will require a high level of flexibility. Also their ability to utilize IT in their work will be crucial.

The process of continuous and automatic data exchange between companies will become mainstream; all driven by the lower costs of communication for landline, satellite and mobile, as well as the fast and continuously open Internet connections.

Internet trading will grow rapidly. Outsourcing, or hosting of non-core technology activities will keep investment levels in technology bearable. Through outsourcing companies can concentrate more on creating competitive difference and added value. Once some larger tuna companies will move to trading on-line, an irreversible chain reaction will follow soon. For the future, the right use of information technology in the daily business will be a very important factor in determining who will be winner, and who not!

So what should your company do?

- Do not re-invent the wheel, but watch current innovative initiatives, especially in the US and Europe closely. Participating in them, or emulating them might save precious time and money.
- Be unreasonable – in order to adapt your company rapidly, and to catch up, you might have to put some high pressure on your organization

- Get top customers and suppliers closely involved. See how your business and supply chain initiatives can become more integrated.
- Faster is Easier. Everything goes faster in the 21st century. Digitizing your company faster, and abruptly might be easier, and less disruptive, then doing it gradually. You'll have to be there within a year, if you want to keep up!
- But above all continue to create competitive difference!

EL ATÚN EN LA NUEVA ECONOMÍA: INNOVACIONES TECNOLÓGICAS RELATIVAS A LA PESCA, COMERCIALIZACIÓN Y TRANSFORMACIÓN DEL ATÚN

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Resumen: La irrupción de Internet y de diferentes tecnologías ha supuesto un tremendo cambio en todos los mercados. Compañías de todos los sectores como las del mercado del atún, reconocen el enorme potencial de ebusiness dedicando enormes esfuerzos para su adopción. Sin embargo, este paso no es trivial y sólo puede conseguirse mediante la participación de la comunidad de negocio de la que forma parte la compañía.

El proyecto e-CANNED está encuadrado dentro de las medidas de acompañamiento del programa Tecnologías de la Sociedad de la Información dentro del 5º Programa Marco de la Unión Europea, bajo una iniciativa de la Xunta de Galicia. El objetivo del proyecto es la implantación en dos regiones europeas (Galicia y la Bretaña francesa), caracterizadas por el predominio de una industria tradicional (las conservas de pescado) tecnologías ebusiness para comprar, vender y hacer negocios electrónicamente; así como el establecimiento de una práctica exportable al resto de compañías del sector o a otros sectores, como ejemplo a seguir en la transición de una compañía y/o de un sector hacia la Nueva Economía.

1. Introducción

La irrupción de Internet y la aparición de nuevas y diferentes tecnologías ha supuesto un tremendo cambio en la forma de trabajar de las compañías afectando a la mayoría de los mercados. Internet está cambiando los hábitos comerciales de usuarios, clientes y proveedores y, en consecuencia, de las tecnologías asociadas a sus procesos de intercambio y comunicación. Su potencial es casi ilimitado y sus cifras impresionantes con muchísimos ceros. Curiosamente, las cifras del negocio entre empresas (B2B, business to business) van más que a duplicar las del negocio de empresas a particulares (B2C, business to consumer).

Todos los sectores, y el mercado del atún no es una excepción, se están moviendo hacia algo que muchas veces no saben lo que es, pero saben que hay que estar ahí. Las compañías reconocen el enorme potencial de ebusiness e intentan subirse al carro para no quedar atrás. Sin embargo, este paso no es trivial y sólo puede conseguirse mediante la participación de la comunidad de negocio de la que forma parte la compañía.

El sector de la pesca y de las conservas ha visto en los últimos meses cómo están surgiendo proyectos de toda índole (<http://www.worldfishsite.com>, <http://www.globalsea.com>, <http://www.pesca2.com>) basados en iniciativas ebusiness. Uno de los problemas con los que el sector puede toparse es que aunque el potencial del ebusiness es enorme, su adopción y éxito depende de más cosas que de la tecnología. En realidad, las relaciones comerciales entre proveedores, clientes y socios, es decir, la inclusión de toda la cadena de valor, son las que determinan el resultado de este tipo de iniciativas.

El sector debe prestar atención a desarrollar relaciones de negocio y extenderlas a las relaciones ebusiness formando una comunidad electrónica para hacer que sea la tecnología la que trabaje para la empresa y no al revés. El desarrollo de la comunidad debe centrarse en las personas y en las relaciones comerciales ayudando y animando a sus proveedores y socios a participar en la red y para contribuir a garantizar que todas las partes implicadas obtengan el máximo beneficio de sus inversiones.

Cualquier compañía que pretenda desarrollar un centro de ebusiness para su red de proveedores/socios debe ocuparse de desarrollar o fomentar (si ésta ya existe) una comunidad desde el primer día. El proyecto e-CANNED, del que se hablará a continuación, reivindica la formación de una comunidad para sacar el máximo provecho de la tecnología ebusiness dentro del sector conservero en general, aunque una de sus metas sea el poder repetir la experiencia en cualquier otra empresa o sector similar.

2. El proyecto e-CANNED

El proyecto e-CANNED está encuadrado dentro de las medidas de acompañamiento del programa Tecnologías de la Sociedad de la Información dentro del 5º Programa Marco de la Unión Europea, bajo una iniciativa de la Xunta de Galicia

El principal objetivo de e-CANNED es estudiar las posibles ventajas que el comercio electrónico puede aportar para el sector conservero. Dentro de esta amplia definición, se encuentran objetivos concretos tales como verificar las posibilidades de reducir los costes y el tiempo de almacenamiento de la materia prima congelada por parte de las conserveras y dotarlas de una oferta más amplia, por medio del comercio electrónico entre empresas (B2B).

Los usuarios participantes en el proyecto pertenecientes al sector conservero desarrollarán pilotos que se integrarán en sus procesos de negocio diarios con la ayuda de dos socios tecnológicos. El éxito de estos pilotos se medirá de acuerdo con unos parámetros cuidadosamente definidos. e-CANNED mostrará los beneficios del e-Commerce para un sector maduro de la industria integrándolos en el entorno habitual de los usuarios.

La solución a desarrollar solventará el problema de comprar y vender materias primas y productos vía Internet dentro de un portal común. El proyecto se llevará a cabo en dos regiones europeas similares: Galicia en el noroeste de España y la Bretaña francesa, en el noroeste de Francia. El problema que la industria afronta en ambas regiones, y probablemente en muchas otras regiones europeas, es el vacío existente entre las modernas tecnologías de la información y de la comunicación y los procesos de negocio tradicionales. Igualmente, el proyecto fomentará la colaboración y los contactos entre las compañías participantes y entre ambas regiones, así como contará con amplia propaganda por toda Europa.

3. Aproximación técnica

Como una medida de acompañamiento, el proyecto e-CANNED es una mejor práctica en la cual los socios tecnológicos ofrecen soluciones probadas para el sector industrial de las conservas. Así, se personalizará una plataforma de comercio electrónico (ya disponible en el mercado y exitosamente usada para las compras electrónicas) que permita a los usuarios llevar a cabo la adquisición de materias primas a través de Internet (transacciones B2B, negocio a negocio) y les ofrezca un nuevo sistema de intermediación.

En este servidor se instalará un mercado virtual (una comunidad abierta) en el que las conserveras ofrezcan sus productos a los usuarios (B2C). Este mercado común centralizará el acceso a las páginas web de las conserveras. Allí, los usuarios, tanto grandes distribuidores como compradores individuales, podrán comprar los productos que deseen, buscando por productos, por empresa conservera, por precio, por pescado etc. Igualmente, podrán pagar de una forma segura y recibirán el producto en la dirección que dispongan.

La parte principal del sistema se instalará en una Asociación Nacional (ANFACO), de forma que los requisitos técnicos de los usuarios (proveedores, conserveras, distribuidores y usuarios) sean solamente un PC y un modem para acceder a Internet.

Como ya se ha explicado, la tecnología a aplicar está basada en una plataforma de comercio electrónico ya existente que proporciona una comunidad de usuarios con soluciones para interacciones personalizadas. Esta plataforma explotará las posibilidades que la web ofrece para realizar negocios de acuerdo

con las necesidades globales e individuales de cada compañía. El objetivo final de esta plataforma es crear un entorno que sea amigable, flexible, fácilmente accesible, seguro y personalizable. Hay que hacer notar que esta aplicación será innovadora en este sector. Teniendo en cuenta que el proyecto es una mejor práctica, se dará especial importancia a la evaluación de los pilotos y a la documentación que pueda realizarse para repetir este proyecto en otros sectores.

En el día a día de cada compañía, los afectados por el proyecto son muchos. El proyecto incluye compras y ventas de tal forma que tanto directores de departamentos como personal técnico tendrán que usar el sistema a varios niveles. Consecuentemente, durante la fase de planificación se iniciará a los usuarios en Internet. Por ello se desarrollará un kit de iniciación a Internet (una adaptación de otro kit de iniciación desarrollado durante otro proyecto europeo llamado APONTE). Esta enseñanza transmitida en CD-ROM formará a los usuarios para un mejor aprovechamiento de los pilotos.

4. Metodología, fases principales e hitos

El proyecto está organizado en tres áreas: gestión del proyecto, diseminación y evaluación de los pilotos. La metodología a seguir es iterativa: empezando con un informe sobre la situación actual (descripción de la industria de la región, objetivos de la industria, modelos de actividad, posicionamiento estratégico ...) se desarrollarán los procesos de negocio relacionados con el proyecto (compras y ventas).

Esta fase de pre-análisis continuará con el estudio de los requisitos (visión y enfoque, problemas específicos a resolver, requisitos de usuario para B2B y B2C). Este informe irá acompañado de un plan de negocio inicial dirigido a evaluar la estrategia a largo plazo de los participantes en el proyecto. A continuación, se establecerán las métricas que evaluarán el rendimiento del sistema (desde un punto de vista técnico y en términos de mejoras del negocio).

Una vez hecho esto, el piloto (diseño, implementación y pruebas) comenzará. El primer prototipo se cotejará con una nueva versión de los requisitos de usuario y una nueva versión de las métricas y se construirá un segundo prototipo. Este segundo prototipo será igualmente evaluado y se revisará el plan de negocio aprovechando la experiencia adquirida. Finalmente, habrá una versión que se utilizará para diseminar el proyecto y sus resultados.

Se tendrán en cuenta experiencias similares (en el sector pesquero o en otros relacionados) en el área del B2B y B2C. Con ellas se realizará el plan de diseminación y explotación a nivel local e internacional dependiendo de las compañías participantes en el proyecto. Igualmente, la web del proyecto e-CANNED permitirá consultar el avance del proyecto y se utilizará como herramienta de comunicación entre los miembros del consorcio y el resto de partes interesadas (Comisión Europea, otras compañías pertenecientes al sector etc.).

5. El Consorcio

El Consorcio de este proyecto está formado por tres tipos de socios:

Socios tecnológicos – Catalizadores – Usuarios

SEMA Group SAE coordinará el proyecto aportando más de 10 años de experiencia en la gestión de proyectos europeos. Además de esta experiencia, Sema, como uno de los líderes en integración de sistemas en España, también desempeñará varias tareas en la parte técnica del proyecto adaptando la tecnología existente para satisfacer las necesidades de las conserveras.

CESGA, Centro de Supercomputación de Galicia, es un proveedor de tecnología en este proyecto y contribuirá dando soporte al usuario. CESGA cooperará en la adaptación del software de acuerdo con los requisitos del usuario y producirá el kit de iniciación a Internet. Igualmente, proporcionará soporte técnico al usuario durante todo el proyecto.

ANFACO es la asociación nacional de fabricantes de pescados y mariscos. ANFACO integra más de 140 empresas vinculadas al sector. Los usuarios participantes en el proyecto son miembros de ANFACO. Además de actual como socio catalizador en el proyecto, ANFACO representará los intereses de los proveedores de materia primario cuya cooperación es vital para el éxito del mercado virtual.

USUARIOS: Compagnie Bretonne de la Coquille (COBRECO), Conserveras ANTONIO ALONSO S.A., Ecuris S.A., Justo López Valcárcel S.A., Modesto Carrodegas S.L.

Los usuarios proceden del sector conservero y están localizados en el área rural de Galicia (noroeste de España) y la Bretaña francesa (noroeste de Francia) en las cuales este sector desempeña un papel muy importante en la economía regional. A excepción de Ecuris, el cual es una empresa de mayor tamaño, los usuarios son representativos de una pequeña y mediana empresa en el sector. Además de las compañías mencionadas, otras serán subcontratadas durante el proyecto como por ejemplo la compañía **Technopole de Quimper Cornouaille**, que actuará como catalizador en Bretaña.

6. Beneficios y lecciones

Se espera obtener los siguientes beneficios:

- a. **Mejorar la adquisición de materias primas** de proveedores vía Internet. Proporcionar un mayor rango de ofertas y obtener mejores precios con la herramienta de intermediación electrónica. Los proveedores se beneficiarán del sistema obteniendo una clientela más amplia, siendo capaces de hacer más ofertas y reducir sus stocks de materias primas.
- b. **Mejorar el almacenamiento de las materias primas.** Reducir el tiempo que las conserveras tienen las materias primas almacenadas. Las conserveras podrán comprar las materias primas en el momento preciso. Los proveedores adaptarán sus stocks a las demandas. Esto se medirá comparando el tiempo y el coste de almacenamiento antes, durante y después del proyecto.
- c. **Mejorar las ventas** vendiendo por Internet. El proyecto evaluará la cantidad total de ventas y lo comparará con datos históricos. Aunque no es el principal objetivo del proyecto, se espera aumentar las ventas por este canal.
- d. **Alcanzar un mayor número de clientes.** El proyecto medirá el incremento de clientes. Los clientes que accedan al mercado virtual frecuentemente podrán registrarse y su comportamiento será registrado. De esta forma podrá analizarse la procedencia de los clientes, sus necesidades y podrá personalizarse la oferta abriendo nuevas posibilidades.
- e. e-CANNED va más allá de los usuarios a los que va dirigido, especialmente en regiones como Galicia en las que el uso de Internet y otras tecnologías de la información traerá beneficios adicionales.

7. Conclusiones

Como el proyecto e-CANNED todavía está en una etapa inicial, es difícil extraer conclusiones sobre actividades futuras. Sin embargo, el poder mostrar beneficios concretos del comercio electrónico en una industria tradicional europea, motivará a otros sectores a seguir sus pasos para que introduzcan soluciones en sectores a los que les está costando adaptar las nuevas tecnologías.

Los prototipos piloto (mejor práctica) familiarizarán a los usuarios con la plataforma y les mostrarán las ventajas que conlleva el usar esta tecnología. El principal objetivo es demostrar la forma en la que los procesos de negocio pueden mejorarse usando una plataforma de comercio electrónico para la creación de una comunidad de usuarios en la que todos obtengan ventajas.

Las lecciones extraídas de los pilotos serán documentadas y diseminadas para proporcionar a otros usuarios –de otras regiones, especialmente del norte de Europa y de otros sectores– la posibilidad de

basarse en las experiencias publicadas. El objetivo no es sólo llevar a cabo los pilotos sino también poder repetir la experiencia.

En e-CANNED se desea extraer resultados realistas y de utilización que se resumirán en un paquete de negocio fácilmente publicable. Con este paquete de negocio será más sencillo convencer a otros sectores para que adapten un sistema similar.

e-CANNED es interesante igualmente desde una perspectiva económica para proveedores de materias primarias como pescado congelado. Estos usuarios estarán involucrados en el proyecto a través de ANFACO. Con la plataforma común los proveedores podrán:

- Alcanzar una clientela más amplia e incrementar el número total de clientes
- Vender sus productos más rápidamente
- Reducir el coste y el tiempo de los productos en stock
- Compartir los costes del mantenimiento de la plataforma electrónica
- Tener un rango de ofertas más amplio

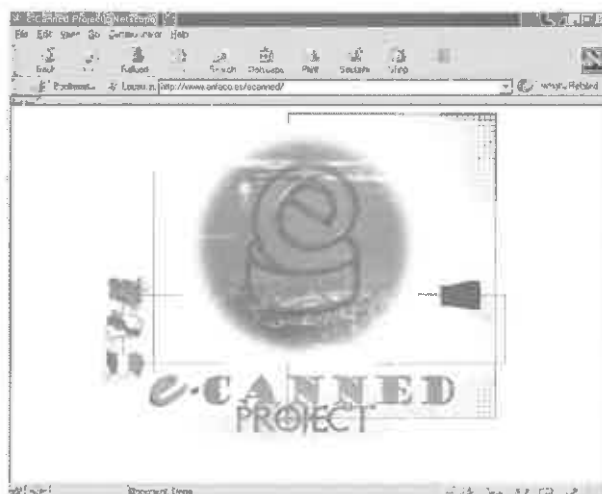
Aunque los proveedores deberán competir en la misma plataforma, tendrán una clientela segura. Las conserveras que utilicen la plataforma van a ser compradores potenciales y no observadores.

Otro área potencial de crecimiento económico puede venir con la inclusión de industrias relacionadas como la logística, seguros y entidades de pago, las cuales ayudarán a hacer el sistema y los servicios relacionados más atractivos dando lugar a una solución integrada. De este modo, la comunidad estará completa e incluirá toda la cadena de valor ("From Fish to Dish"). Por ello, se invitará a estas entidades a que se unan en los pilotos ya que varias han expresado ya su interés en los mismos.

Las organizaciones de usuarios deben comprometerse a continuar utilizando la plataforma después del proyecto. Como a menudo sucede en este tipo de proyectos, los beneficios sólo se hacen visibles a largo plazo y no pueden comprobarse totalmente durante el proyecto. Si algunas medidas demuestran beneficios concretos para los usuarios, esto debería fomentarles para continuar con el mismo y explotarlo en el día a día. Debido a lo anterior, las métricas incluirán instrucciones sobre cómo medir estos beneficios a largo plazo y su impacto una vez haya finalizado el proyecto.

Más información sobre el proyecto e-CANNED en la dirección:

- <http://www.anfaco.es/ecanned/>



LA IMPORTANCIA DE LA APLICACIÓN DE NUEVA TECNOLOGÍA PARA LOS CONTROLES DE CALIDAD Y STANDARES VÍA INTERNET

MR. ANDRÉ LOUBET-JAMBER

FOUNDER AND CHAIRMAN, FIS HOLDING

El negocio del pescado **esta entrando** en una nueva etapa donde nuevas soluciones se requieren.

Visto desde el punto de vista histórico el incremento de producción pesquera ha sido generado por el desarrollo tecnológico.

Este desarrollo se ha dado en tres etapas:

a. 1) Con la introducción de nuevas tecnologías en buques pesqueros (congelado, procesado, tamaños, potencia, equipamiento de búsqueda, tecnología en redes, portones, pesca con anzuelos, etc)

b. 2) Con la introducción de nuevas tecnologías en el procesamiento (maquinaria procesadora, automatismo en el proceso, control de clasificación, peso, glaceado, packing, corte, glaceado, etc.)

c. 3) Desarrollo de las tecnologías en la acuicultura (mejoramiento del alimento, sistemas de control, protección, desarrollo, control y protección a las enfermedades, etc)

La etapa que estamos viviendo sería entonces la cuarta.

Esta etapa no ha comenzado hoy sino que se ha ido aplicando paulatinamente en cada área del negocio. La informática ha ido ganando espacios en todos los ámbitos y hoy es moneda corriente en la administración, control de pesca, comunicaciones, control de los cultivos, control de producción, ventas, atención al cliente, etc.

a. Internet es solo un paso más dentro de esta 4ta. etapa.

b. Internet no es la solución a ningún negocio sino solo un paso más.

c. Internet permite acceder a INFORMACIÓN y esta es la clave de todo

Tener información al alcance de la mano y no tener que pasar horas en buscarla es una gran ventaja. FIS está invirtiendo en este sentido desde hace 6 años. FIS quiere decir "FISH Information & Services" es decir que ponemos por delante la información para luego hablar de SERVICIOS. No voy a entrar a explicar FIS porque casi todo el mundo lo conoce. El motivo de esta exposición será el de hablar de los SERVICIOS que estamos desarrollando.

Hay mucha confusión en los últimos tiempos porque el mercado se ha dividido entre los que creen que Internet permitirá CAMBIAR todo YA y los que creen que no necesitan ni computadora para continuar con sus negocios.

Tengo una buena noticia...y es que ambos tienen RAZON! Por un lado Internet está cambiando YA muchas cosas (y no solo en el negocio del pescado) pero también es cierto que los colegas que llevan el negocio y han tenido éxito...lo han logrado sin encender un monitor!

Esto es muy meritorio pero sabemos que los hijos de estos emprendedores usan la computadora antes de decir BUEN DIA por la mañana...Así que teniendo en cuenta que los que tienen éxito HOY son los que fueron los AVANZADOS en otros tiempos, introduciendo tecnología en la pesca, procesamiento y cultivo.... ,hoy serán sus hijos u otros lo que introducirán SERVICIOS y SOLUCIONES por la vía de la TECNOLOGIA e INTERNET.

Han surgido lonjas "virtuales" como conchillas en los cascos de los buques. Pero hablar de lonjas virtuales sin tener en cuenta los problemas que esto TRAE es algo que queremos tener en cuenta.EL empresario de Internet está preparado para utilizar muchísimas cosas que la mayoría de la gente del sector cree que no necesita aún.Y por nuestra experiencia de 6 años en Internet entendemos que el mercado no está preparado para utilizar este tipo de herramientas aún.

Hablemos entonces de los PROBLEMAS y luego de cómo podemos ir solucionándolos Ya comentamos el problema de la falta de información y de cómo Internet NOS TRAE la información al minuto sin tener que ir a buscarla.

Hablemos de otro problema: EL CONTROL DE CALIDAD

Los problemas de calidad en la captura,frescura,transportación,clasificación,procesamiento, embalaje, etc. ha sido utilizado como herramienta de "negociación" por muchísimas empresas e intermediarios.Lo que en principio es un PROBLEMA ha sido el pan de cada día para que otros hagan dinero a costa de reducir precios, sacar ventajas o hacer reclamaciones en los pagos.

La mayoría piensa en producir más..pero hay que detenerse por unos minutos y pensar si MEJORAR los sistemas de control de calidad y evitar reclamaciones no es más ventajoso que aumentar los volúmenes y los problemas! Por un lado se obtienen mejores precios, se evitan pagos de reclamos,se accede a mejores compradores/proveedores y se puede acceder a mercados más sofisticados.

La clave de las mejores marcas japonesas de automóviles y electrodomésticos no ha sido producir mayor volumen y bajar los precios sino por el contrario ir subiendo los precios ha medida que se demuestra que el producto es CONFIABLE.

PONENCIA / *SESSION*

3

**LOS INTERCAMBIOS INTERNACIONALES Y LA OMC:
IMPLICACIONES PARA LAS EMPRESAS DEL ATÚN DE
LOS SISTEMAS ACP Y SPG EN AMÉRICA LATINA Y
OTRAS ZONAS DEL MUNDO**

***INTERNATIONAL EXCHANGES AND THE WTO:
CONSEQUENCES TO TUNA COMPANIES FROM ACP AND
PGS SYSTEMS IN LATINAMERICA AND ANOTHER
REGIONS***

EXCMO. SR. D. FRANCISCO UTRERA MORA,
SECRETARIO GENERAL DE COMERCIO EXTERIOR, MINISTERIO DE ECONOMÍA

MR. BAUDOUIN SURY,
JEFE DE LA UNIDAD DE LA DIRECTION A/4 "FISH-MARCHÉS". DG PESCA-UE

ILMO. SR. D. ALBERTO LÓPEZ GARCÍA-ASENJO,
CONSEJERO DE AGRICULTURA, PESCA Y ALIMENTACIÓN, REPET

MODERADOR:
D. GUILLERMO ALONSO JAÚDENES,
DIRECTOR GENERAL DE ANTONIO ALONSO. S.A.

INTERCAMBIOS INTERNACIONALES –LA OMC– LOS ACUERDOS ACP Y SPG IMPLICACIONES PARA LAS EMPRESAS CONSERVERAS DE ATÚN

EXCMO. SR. D. FRANCISCO UTRERA MORA

SECRETARIO GENERAL DE COMERCIO EXTERIOR – MINISTERIO DE ECONOMÍA

INTRODUCCIÓN

El sector pesquero español es un área económica con un peso social importante y con un comportamiento muy dinámico, que le permite adaptarse con flexibilidad a los rápidos cambios que se vienen produciendo, en un mundo, en el que el término globalización va adquiriendo cada vez más importancia. Los mercados no son ajenos a esta internacionalización que avanza con rapidez.

A pesar del importante volumen de capturas y la producción de la acuicultura, éstas no son suficientes para cubrir la demanda interna, siendo necesario recurrir a las importaciones, por lo que un buen funcionamiento del mercado con unas reglas comerciales bien definidas es de vital importancia para este sector. Las importaciones pesqueras suponen algo más del 3% del total de las importaciones españolas.

Nos encontramos en un periodo de reflexión tanto a nivel comunitario como mundial. La materia prima de nuestra industria es un recurso natural, que ha de ser gestionado racionalmente, para lo que es necesario un control internacional, en el que además, tiene un papel fundamental, el establecimiento de unas **reglas comerciales claras**, que eviten competencias desleales y sirvan de soporte a las medidas de control de recursos.

COMERCIO EXTERIOR DE ATÚN Y DERIVADOS

La exportación de estos productos alcanzó los 65.000 millones de pesetas en el año 1999 y superó los 69.000 millones en el 2000. En la importación se ha producido un descenso, pasando de 39.000 millones en el año 1999 y a 35.635 millones en el 2000. La balanza comercial de atún y derivados es por tanto, claramente positiva, gracias a nuestras conservas y a la exportación de atún fresco. En lo que se refiere al atún congelado existe un ligero desequilibrio, importándose más de lo que se exporta.

ORGANIZACIÓN MUNDIAL DE COMERCIO

El propósito primordial de la OMC es contribuir a que las corrientes comerciales circulen con fluidez, libertad, equidad y previsibilidad. Estamos atentos a la futura nueva ronda de negociaciones en Doha, de la que no hay todavía una agenda definitiva, pero en la que se podrían tratar nuevas reducciones arancelarias para los productos de la pesca. Esta liberalización ha sido abordada por la UE, en las negociaciones realizadas hasta la fecha, estableciendo claramente su relación con el cumplimiento de la Convención Internacional de Naciones Unidas del Derecho del Mar y los Acuerdos Internacionales de pesca relacionados con la gestión de los recursos y preservación del medio ambiente.

Otro aspecto de interés es la reflexión que se está produciendo sobre la posibilidad de incluir en la agenda de Doha las subvenciones pesqueras, asunto que se está discutiendo en diferentes foros internacionales.

ACUERDO ACP

El nuevo acuerdo con los países ACP o Convenio de Cotonou, firmado en Benin el 23 de junio de 2000, mantiene el anterior régimen de preferencias arancelarias no recíprocas en el que se establece la exención de derechos para todos los productos pesqueros.

Con el nuevo Acuerdo, la UE pretende preservar la unidad de los países ACP, a la vez que introduce el principio de diferenciación. Al no ser estas concesiones compatibles con la OMC, existe un compromiso de establecer nuevos acuerdos comerciales acordes con sus normas, creando subgrupos económicos regionales y suprimiendo progresivamente los obstáculos a los intercambios. Se establecerán Zonas de Libre Comercio en las que, tras un período de adaptación, las concesiones serán recíprocas.

SPG - INICIATIVA EBA

El Sistema de Preferencias Generalizadas o SPG es un conjunto de medidas arancelarias que se conceden de forma autónoma, sin reciprocidad, con el objetivo de ayudar a los países en vías de desarrollo. Aunque los productos pesqueros gozan de preferencias arancelarias en este sistema, se excluyen de las mismas algunos productos. Así, en el régimen general, aplicado a los países SPG que no están incluidos en el SPG-Droga o el grupo de Países Menos Avanzados (PMA), las conservas de atún que entran en la UE tienen el arancel correspondiente a países terceros. Las conservas y derivados del atún procedentes de los países SPG-Droga y PMA entran en la UE sin pago de derechos, aunque se cuenta con un mecanismo de control que evita que se sobrepasen las corrientes comerciales tradicionales.

La Comisión ha presentado una propuesta de modificación de este sistema, con la intención de mejorar y simplificar el actual régimen, que podría entrar en vigor el 1 de enero de 2002.

En cuanto a la iniciativa EBA, "Todo Menos Armas", que se aplica a los PMAs, supone la entrada en la UE de todos los productos incluidos en el arancel, del capítulo 1 al 97, sin pago de derechos arancelarios.

OTROS ACUERDOS COMERCIALES DE INTERÉS

UE-Méjico

El atún procedente de Méjico destinado a la industria de transformación no paga ningún arancel, lo que facilita el abastecimiento de materia prima. Se mantiene la protección para las conservas comunitarias, admitiéndose con reducción arancelaria una cantidad limitada de conserva de origen mejicano. No se han iniciado las posibles negociaciones sobre el artículo 10.5., que establece una cláusula de revisión sobre la posibilidad de abrir, antes del 1 de enero del 2002, un cupo arancelario con tratamiento preferencial para los lomos de atún.

Marruecos

Con este país mantenemos un acuerdo comercial claramente favorable para los intereses marroquíes, en el que se establece la entrada de productos pesqueros marroquíes a la comunidad libres de derechos, no existiendo reciprocidad con los productos comunitarios. Esta situación que tenía justificación por

el acceso a aguas marroquíes se manifiesta como claramente discriminatoria una vez que el acuerdo de pesca no se ha renovado.

Sudáfrica

El acuerdo comercial con Sudáfrica establece la concesión de preferencias arancelarias a los productos pesqueros sudafricanos cuando se permita el acceso de los barcos comunitarios a los recursos pesqueros de ese país. Las negociaciones para un nuevo acuerdo pesquero ni siquiera se han iniciado, por lo que se mantienen los actuales aranceles a la importación.

CONTINGENTES Y SUSPENSIONES ARANCELARIAS

Los contingentes arancelarios autónomos permiten la exención total o parcial de derechos dentro de unos límites de cantidad y para un periodo determinado, utilizándose cuando la producción comunitaria no es suficiente. Estos se complementan con las medidas de suspensión arancelaria definitivas que establece la nueva Organización Común de Mercado para una cantidad y productos determinados.

RESTRICCIONES COMERCIALES-EMBARGOS

Estos últimos años estamos asistiendo a la aplicación, por parte de los países miembros de distintas Organizaciones Regionales de Pesca (ORP), de medidas comerciales restrictivas con fines de conservación de recursos y medio ambiente. España, antes, y ahora como miembro de la UE, participa activamente en la mayor parte de las ORPs existentes, aplicando las recomendaciones que se acuerdan en las mismas.

Otro asunto de interés es el embargo a los productos derivados del atún yellowfin que no han levantado aún las autoridades americanas, pendiente de la elaboración, por parte de la Comisión, del reglamento que establezca un programa de seguimiento y verificación, uno de los compromisos que la UE adquirió por el Acuerdo APICD (Programa Internacional para la Conservación de Delfines). España ya cuenta con este programa tras la publicación del Real Decreto 942/2001 en el Boletín Oficial del Estado de 7 de agosto de este año.

INTERNATIONAL EXCHANGES AND THE WTO: CONSEQUENCES FOR THE TUNA COMPANIES FROM THE ACP AND GSP TARIFF REGIMES IN LATIN AMERICA AND OTHER REGIONS.

MR. BAUDOUIN SURY

HEAD OF UNIT, COMMON ORGANISATION OF MARKETS AND TRADE
DIRECTORATE-GENERAL FOR FISHERIES EUROPEAN COMMISSION

Tuna products and the world market place

The market for tuna and tuna related products has become a full blown, globalised, trading place. Round tuna is being fished all around the world and sold to any buyer willing to pay the best price for it. Processed tuna products (loins, canned tuna) are also traded world-wide.

Trade in fishery products between countries that are members of the World Trade Organisation is subject to internationally agreed rules. The present framework was established at the conclusion of the Uruguay Round in 1994.

The Community's overall tariff framework for fishery products

The Common Customs Tariff (CCT) for fishery products is characterised by a) relatively high protection for processed products (e.g. 24% for canned tuna), b) medium protection for products intended for direct consumption or for species where there is sufficient Community output (e.g. 12%-13% for cod) c) reduced rates for products where there is no Community production in sufficient quantity and/or quality. This often involves products intended for the processing industry (e.g. 0% for frozen whole tuna).

The majority of Community imports (70%) are however, made at zero or reduced duties by virtue of preferential treatment (ACP, GSP and GSP "DRUGS") or other autonomous measures (tariff quotas or suspensions) that the Community puts in place to facilitate the supply of products intended for the processing industry. Within the framework of the reform of the Common Organisation of Markets for fishery the Council decided at the end of 1999 to implement the suspension of tariffs for unlimited duration, and multi-annual tariff quotas (2001-2003) for such products (e.g. a tariff quota of 4.000 tonnes of tuna loins at 6% duty rate).

The Community has, over the years, implemented a variety of tariff regimes designed to facilitate imports of fishery products from former colonies and from some developing and least developed countries such as the above mentioned ACP and GSP regimes.

The Cotonou Agreement and the new ACP-EC Trade Framework.

The new ACP-EC Agreement (the so called Cotonou Agreement) provides a framework for sup-

porting the mutually reinforcing effects of trade co-operation and development aid. The EC and the ACP States have agreed on a process to establish new trading arrangements that will pursue trade liberalisation between the parties and formulate provisions in trade-related matters.

The objectives of this new approach in economic and trade co-operation are:

- To promote smooth and gradual integration of ACP economies into the world economy
- To enhance production , supply and trading capacities
- To create new trade dynamics and foster investment
- To ensure full conformity with WTO provisions

The corner stone of this new approach is the establishment of Free Trade Agreements between individual, or groups, of ACP countries.

In order to achieve that the Community and the ACP states will

- Liberalise in parallel, starting in 2000, almost all imports from all LDCs, on the basis of GSP (see section on the GSP regime).
- Start formal negotiations on economic partnership agreements by September 2002 at the latest.
- Assess, in 2004, the situation of non-LDC ACP countries which are not in a position to enter into trade agreements and examine alternative possibilities.
- Assess, in 2006, progress in negotiation of the new trade agreements.
- Implement the new trading arrangements by 1st January 2008 at the latest.
- Start liberalisation of trade by 2008, at the latest, during a transitional period of at least 12 years.

This approach will lead to a fully WTO-compatible regime. In the meantime, the Community has submitted to the WTO a request for a waiver covering the present trade arrangements.

In the new framework, economic operators should then be more inclined to establish closer relations with their ACP partners, domestic and foreign investment is expected to grow and more know-how and technology will be transferred - all of which will boost ACP countries' competitiveness and ease their smooth and gradual integration into the world economy.

The Community's Generalised System of Preferences and its future.

Short history of the Generalised System of Tariff Preferences

As a result of discussions between industrialised countries in the 1960s, it was recommended to create a "Generalised System of Preferences" under which industrialised countries would grant autonomous and non-reciprocal trade preferences to all developing countries. 142 countries are currently eligible.

Since 1971, most industrialised countries grant autonomous trade preferences to imports from developing countries under the GSP. The EU was the first to implement its own GSP in 1971. Trade preferences under the GSP are available for imports from all developing countries. For some 90 deve-

loping countries and economies in transition, notably in Asia, the GSP provides the only preferential access to the EU's market.

The EU's GSP is implemented over a ten-year cycle. The present cycle began in 1995 and will expire in 2004.

The existing Regulation entered into force on 1 July 1999 and covers the period until the end of 2001. It is the first one to cover all products and all arrangements (such agricultural, industrial, textiles GSP and so on). It is laid down in Council Regulation (EC) No 2820/98 of 21 December 1998.

The Commission's proposal for the new GSP

On 12 June, the Commission adopted a proposal for revision to the Generalised Scheme of Tariff Preferences (GSP) for the years 2002 to 2004. This proposal for new regulation is designed to simplify the GSP regime, restore the level of its benefits and target them more effectively in the interests of developing countries. It is also intended to improve the effectiveness of special incentives to promote core labour and environmental standards. The scheme constitutes a further tangible example of the promotion of sustainable development, a central plank of EU trade policy. The new Regulation complements and fully incorporates the recent "Everything But Arms" (EBA) initiative in favour of Least Developed Countries.

The decision on the Community's new GSP on the eve of Doha reflects the Union's intention to make the developing countries' integration into the world economy a priority at the new Round in the interests of fair and more sustainable development.

Simplification and attractiveness

The proposed regulation will simplify the rules and harmonise procedures on the different arrangements available under the GSP. The objective is to make the GSP more user-friendly and attractive. This will in turn motivate more traders to make use of the GSP, and thus increase trading opportunities for beneficiary countries. The proposal maintains duty-free access for all non-sensitive products, while all other products will be classified in one category of sensitive products, replacing the previous three categories (very sensitive, sensitive and semi-sensitive). In order to address the erosion of preferences, the key element is a proposed flat rate reduction by 3.5 percentage points

Improved targeting and better adaptability

The proposed regulation is designed to target preferences to benefit those countries, which need them most, rather than countries and sectors which are in a position to face international competition without preferential treatment. Previously, the eligibility of countries and particular sectors was decided only at the entry into force of a new regulation. It is now foreseen to do this on an annual basis. However, in order to enhance predictability, eligibility of both countries and sectors will only be decided where countries meet the criteria during three consecutive years. The results of this permanent screening will be made public, so as to provide beneficiary countries with some early warning. It is also foreseen to provide for re-inclusion of those countries and sectors, which, during three consecutive years, no longer meet the eligibility criteria.

Labour and environment standards

The special incentive arrangements contained in the Regulation confirm the EU's preference for an incentive based approach which links additional benefits to respect for core labour and environmental standards, again in the interests of promoting sustainable development. The additional trade preferences would simply double those benefits provided under the general arrangements.

On labour the special incentive arrangements will mean beneficiaries must apply effectively all ILO Conventions containing related to core labour standards in order to be eligible. On the other hand, beneficiary countries committing "serious and systematic" violations of those standards would run the risk of losing their GSP status.

Prolongation of Special Drugs Regime.

The special "drugs GSP regime", established to help the Andean and Central American countries in 1996 to replace drugs cultivation with alternative products would be prolonged for a further three years until the end of the current GSP "cycle" in 2004. This would be accompanied by a careful process of monitoring and evaluation in respect of each beneficiary's efforts not only to combat drug production and trafficking, but also to comply with core labour and environmental standards.

"Everything But Arms"

The new Regulation fully incorporates the recent "Everything But Arms" (EBA) initiative in favour of Least Developed Countries (LDC) which has been applied since 1 March. EBA provides for duty and quota-free access for the 49 LDCs.

The decision on the Community's new GSP on the eve of Doha reflects the Union's intention to make the developing countries' integration into the world economy a priority at the new Round in the interests of fair and more sustainable development.

The Community's commitment to the European tuna industry within the global market place

The tuna industry has benefited from Community support through mechanisms such as :

The compensatory payment for tuna delivered to the processing industry. This measure targets the Community harvesting sector.

The structural funds, and more in particular the Financial Instrument for Fisheries Guidance. Through this mechanism financial help has been channelled to the harvesting and the processing sector in various Community regions.

The fisheries agreements whereby Community vessels have access to fishery resources in third countries' Exclusive Economic Zones. The obvious beneficiary of this instrument has been the harvesting sector.

Finally the processing sector has enjoyed, and continues to enjoy, some degree of protection from the world market through a duty rate of 24 % applicable to processed and semi-processed tuna products.

The Community remains committed to the European tuna industry. This is confirmed by the fact that the above mentioned measures and instruments will continue to exist in the coming years. Indeed, the compensatory allowance for tuna has been maintained in the latest reform of the Common Organisation of Markets, financial help to the tuna industry, through the Structural Funds, will be maintained for the period 2001 to 2006 and a series of fisheries agreements are in the process of being renewed.

The new challenges facing the industry

The European Commission, in its Green Paper on the future of the Common Fisheries Policy has flagged some of the external challenges that will need a response from the European fisheries sector:

the forthcoming enlargement of the European Union,

the globalisation of the economy,

the emergence of new players in world fisheries reflecting the legitimate aspirations of many developing countries to expand their own fishing industry,

the increased focus on environmental and development policy considerations in fisheries management

and finally the growing interest of civil society in fisheries matters are some of today's challenges to which the CFP needs to find satisfactory answers.

Developing and least developed countries have already indicated that they will accept the launch of a new round of trade talks only if developed countries are ready to make further concessions. The Community has acknowledged some of these aspirations and has granted, by means of the "Everything But Arms" initiative, duty free access to all products originating from the poorest countries.

Increased and diversified international trade and changes in the WTO framework of trade rules are factors that will have a significant impact on all the industry players, irrespective of their location. Among these factors we can mention changes in five different areas related to international trade that are likely to impact upon your industry in the coming years, such as :

- tariffs;
- technical regulations, in particular concerning product designation and labelling;
- health regulations;
- rules of origin;
- the link between responsible fishing and trade.

The Community response

Yet, the Community cannot ignore international developments and, what could be worse, isolate itself and miss increased opportunities in world markets. Definitely what the Community can and should do, is:

First and foremost, actively participate in the international fora where decisions are taken and rules are adopted. It is therefore imperative that the Community takes a leading role at the WTO when discussing trade in fishery products.

At the same time, and in order to ascertain this leadership, the Community has, and will have, to make sure that the tuna industry can cope with an increasingly integrated and globalised market. This means that the Community policy must help the European industry to enhance its competitiveness in the internal, but also in third country markets. The continuation of the above mentioned measures goes clearly in this direction

Finally, the Community has to make sure that present trade arrangements with third countries (such as the ACP and GSP regimes) are made compatible with existing WTO rules and that these arrangements can cope with the foreseeable evolution of the current WTO legal framework concerning trade agreements, as previously outlined .

Conclusion : forward strategies for economic operators located in the ACP and GSP areas

Looking more closely at the tuna industry in the ACP and GSP countries one can see that, in most cases, it concerns processing companies. These plants are, by and large, owned by foreign investors and form part of vertically integrated groups.

In view of the likely evolution, sooner or later, towards freer and more integrated trade flows world-wide, these groups will need to reassess their production and marketing strategies. Needless to say that this reassessment will be most critical should the WTO member countries embark in a new trade round.

Until now the European tuna industry, with help from the Community and Member States, has a track record of competitiveness, high quality production and responsiveness to market needs. But international competition and new demands on the canning industry from the public will be getting even tougher in future.

When designing new global strategies, the tuna industry will have come to terms with the accelerating globalisation of international trade. It will have to rely on enhanced competitiveness, not protection, in order to adapt to the ever changing trade environment. This applies not only to those companies located in the developed world, but also to those players that have plants and production units in countries benefiting from ACP and the GSP regimes.

LOS INTERCAMBIOS INTERNACIONALES Y LA OMC: IMPLICACIONES PARA LAS EMPRESAS DEL ATÚN DE LOS SISTEMAS ACP Y SPG EN IBEROAMÉRICA Y OTRAS ZONAS DEL MUNDO.

ILMO. SR. D. ALBERTO LÓPEZ GARCÍA-ASENJO

CONSEJERO DE AGRICULTURA, PESCA Y ALIMENTACIÓN
REPRESENTACIÓN PERMANENTE DE ESPAÑA EN BRUSELAS-REPER

La situación abierta con la Ronda de Uruguay que colocó sobre la mesa de todas las naciones las cuestiones relativas a una liberalización del comercio internacional agrario, cristalizó con el Acuerdo de la Agricultura firmado en Marrakech, en abril de 1994; momento en el nació la Organización Mundial del Comercio (OMC).

La OMC, establecida el 1 de enero de 1995 como sucesora del Acuerdo general de Aranceles Aduaneros y Comercio (GATT, en sus siglas inglesas), es la base jurídica e institucional del sistema multilateral de comercio y, a su vez, también es la principal plataforma para el desarrollo de las relaciones comerciales entre los países mediante negociaciones y decisiones colectivas.

La OMC ha iniciado, a través de sus distintos Consejos y Comités, la identificación de los principales objetivos a desarrollar en esta primera década del segundo milenio. En tal sentido, desde la compleja perspectiva de los Acuerdos comerciales multilaterales, está abordando temas claves como son, entre otros:

- Las negociaciones arancelarias sobre productos no agrícolas; entre los que están incluidos los productos pesqueros.
- El binomio comercio - medio ambiente.
- Las ayudas financieras y/o subvenciones.
- La problemática y las consideraciones específicas a tener en cuenta con los países en vías de desarrollo (PVD) y los países menos adelantados.
- Inversiones y competencia.
- Cumplimiento de los derechos sociales básicos.

A este respecto, la evolución de los acontecimientos de estos últimos años han venido a confirmar la realidad de las previsiones formuladas por la OMC ya que todos y cada uno de los puntos identificados anteriormente se debaten en las actuales relaciones comerciales multilaterales que, después de los correspondientes Acuerdos, habilitan los intercambios internacionales de productos.

Esta conjunción entre economías, empresas, sociedades y culturas, considerado como globalización de la economía o mundialización, es un fenómeno imparable que modificará casi todos los sectores de la economía. Originando retos, beneficios y fenómenos perjudiciales en sectores tradicionales como consecuencia, entre otros, del abaratamiento de la materia prima y de los productos transformados.

De la importancia y complejidad de este proceso ya iniciado son un ejemplo, tanto el desarrollo y fracaso de la Tercera Conferencia Ministerial de la OMC - celebrada en Seattle (EE.UU) a finales del año 1999 - como las intrincadas negociaciones que se están celebrando actualmente para intentar lanzar la que sería la Cuarta Conferencia Ministerial. Así como la realización de varios estudios/trabajos sobre el impacto de los Acuerdos de la Ronda de Uruguay aprobados, tanto en los organismos intergubernamentales (FAO - COFI, OCDE, ONU) como en las organizaciones regionales o subregionales con competencia en materia de ordenación pesquera (CICAA, CIAT, IOTC, etc.).

En el contexto que nos ocupa, el sector pesquero (productor, transformador y comercializador) no podrá permanecer al margen de los cambios impuestos por la competitividad de un mercado abierto y libre. A este respecto, el sector atunero, debido a la mundialización de su actividad con flotas que faenan en todos los océanos y una industria transformadora capaz de abastecerse de cualquier mercado exterior, es el más preparado para superar los retos de la liberalización y globalización de los mercados. Destacando por su posición de privilegio mantenida durante años - en comparación con su homónimo ubicado en los países desarrollados - al sector transformador atunero de los países en vías de desarrollo más necesitados favorecido con las rebajas arancelarias autónomas concedidas, tanto al amparo del Sistema de Preferencias Generalizadas como del régimen de suspensiones y contingentes emanado de los acuerdos internacionales (GATT - OMC, Convenio de Lomé - ACP, Política Mediterránea, etc.). Lo cual permitió que estas industrias de transformación del atún localizadas en Estados africanos, caribeños, del océano Pacífico o Iberoamérica (SPG - Droga), disfrutasen de un acceso más favorable al insaciable mercado de los países desarrollados (la UE, entre otros) facilitando la implantación y desarrollo de las mismas.

Las bondades de esta situación, provocaron que las grandes empresas atuneras europeas (francesas y españolas), realizaran fuertes inversiones, unas en los Estados ACP de influencia francófona y otras en los Estados SPG-droga de habla hispana, potenciando y desarrollando el limitado sector transformador atunero de estos PVD's, al tiempo que, entre otras importantes razones estratégicas y logísticas, aseguraban - al amparo del cumplimiento de las reglas de origen - la disponibilidad del abastecimiento de materia prima (en cantidad y calidad) para sus plantas de transformación europeas. Salvando, en gran medida, las imposiciones de los otros grandes complejos atuneros mundiales (estadounidenses y asiáticos).

No obstante lo anterior, esta privilegiada situación deberá acomodarse al nuevo panorama mundial creado con la globalización y su consiguiente desarrollo a través de la OMC ya que, en cualquier caso, el Sistema de Preferencias Generalizadas (SPG) no podrá ser, como antes, una alternativa a los mecanismos liberalizadores de la OMC.

Los Acuerdos de la Ronda de Uruguay, desarrollados en la OMC, constituyen el instrumento prioritario para los PVD y PMA, porque les garantiza un acceso más seguro al mercado de los países industrializados que el que les proporcionarían las concesiones del SPG que, por definición, son revocables.

A su vez, también deberán amoldarse al cumplimiento de los requisitos derivados de las normas y reglamentos técnicos que, en la mayoría de los casos, se han ido desarrollando paulatinamente en los países desarrollados (EE.UU, UE, etc.) a medida que desaparecían progresivamente los derechos arancelarios (denominados como "barreras arancelarias" por los PVD). De tal forma que el resto de "barreras" comerciales adquiere una mayor relevancia.

La implantación de estas normas y reglamentos técnicos, así como su cumplimiento, será decisivo a la hora de facilitar los intercambios comerciales ya que condicionarán la entrada de los productos pesqueros a los mercados de los países desarrollados. Este proceso normalizador en el sector alimentario tiene, entre otros, los siguientes objetivos:

- Potenciar la calidad de los productos, fijando las características que determinan su capacidad para satisfacer unas necesidades dadas y, de forma complementaria, eliminar del mercado los productos de baja calidad.
- Favorecer una relación racional entre la oferta y la demanda, a través del uso de una terminología común sobre la calidad de los productos.
- Asegurar al consumidor productos con una calidad constante y determinada.
- Mejorar la calidad de vida, la seguridad de las personas, animales y plantas, y la protección del medio ambiente.

Por su importancia, no debemos obviar que toda esta política normalizadora del mercado adoptada en los países altamente desarrollados está siendo demandada por los consumidores que, directa o indirectamente, exigen de sus Administraciones garantías en su bienestar social y mayores niveles de protección en la seguridad alimentaria. Así, se ha ido produciendo un incremento, tanto del número de especificaciones técnicas como de su ámbito de aplicación, derivando en un cada vez mayor número de inspecciones y certificaciones que demuestren la conformidad de los productos (importados) con estas nuevas normas. Todo ello está requiriendo, e impondrá en mayor medida en un futuro inmediato, un importante esfuerzo para las empresas exportadoras ubicadas en los países ACP y SPG al objeto de acomodar sus productos pesqueros a las exigencias del mercado.

Evidentemente, lo que para unos es un proceso de normalización y tipificación de los productos pesqueros, para otros (PVD's) son medidas restrictivas alternativas que, en algunos casos, se pueden catalogar como "obstáculos técnicos" al comercio, originando los consiguientes conflictos y denuncias que son debatidos en el correspondiente órgano de solución de diferencias de la OMC.

Por último, destacar nuevamente el decisivo intervencionismo que la opinión pública/ciudadanos tienen sobre el mercado y sus tendencias. Estamos ante un consumidor altamente comprometido con la naturaleza y la conservación de las especies. Que demanda y necesita información sobre los productos que consume (especie, contenido en aditivos, origen y procedencia, valor nutricional, etc) y que acepta positivamente la creación de certificaciones y etiquetas ecológicas y/o de pesca responsable.

En otro orden de cosas, desde el punto de vista funcional, es un consumidor que cada vez dedica menos tiempo a la preparación de las comidas, agradeciendo las nuevas presentaciones de productos más elaborados y de fácil preparación.

Bruselas, 5 de septiembre de 2001

PONENCIA / *SESSION*

4

LA PESCA DEL ATÚN Y SU ABASTECIMIENTO A LA INDUSTRIA: SITUACIÓN ACTUAL Y PERSPECTIVAS FUTURAS DEL RECURSO Y LOS PRECIOS *TUNA FISHERIES AND ITS SUPPLY TO PROCESSOR INDUSTRY: PRESENT SITUATION AND FUTURE OUTLOOK OF THE RAW MATERIAL AND PRICES*

D. IGNACIO LACHAGA BENGOCHEA,
PRESIDENTE DE OPAGAC Y ALBACORA

D. JOSÉ A. ANGULO,
DIRECTOR GERENTE DE ANABAC-OPTUC

MR. MICHEL DION,
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MODERADOR:
D. FÉLIX CONDE RODRÍGUEZ,
DIRECTOR GENERAL DE CONNORSA

SITUACIÓN DEL SECTOR ATUNERO CONGELADOR DESDE EL PUNTO DE VISTA DEL RECURSO Y DEL MERCADO.

D. JOSÉ A. ANGULO

DIRECTOR-GERENTE DE ANABAC-OPTUC

La flota atunero congeladora ANABAC está compuesta de 21 unidades cerqueras congeladoras de bandera comunitaria, si bien 8 unidades más poseen bandera extracomunitaria pero están controladas directamente por armadores nacionales.

Las capturas realizadas por la flota nacional ascendieron a 121.000 toneladas en el año 2000, cifra ligeramente superior a la del año 1999, debido al incremento producido en el océano Indico.

Por el contrario, los precios han continuado muy bajos, con un precio medio para el listado de 86 pesetas en el mercado español, 183 pesetas para el caso del rabil o yellowfin. Como botón de muestra señalar que el precio del listado en el mercado nacional, se situaba en el año 98 en 167 pesetas, y para el rabil o yellowfin el precio medio en España en 1998 era de 270 pesetas.

	98	2000	DESCENSO
YF + 10	270	183	32%
SK + 1,8	167	86	48%

De la producción de Anabac, cerca del 60% de la misma se comercializa en el mercado comunitario, especialmente en España. El resto de la producción se diversifica entre las fábricas de atún asentadas en África (Senegal, Costa de Marfil, Madagascar, Seychelles, Kenia y Mauricio), así como hacia otros países fuera de la órbita ACP (Turquía, Tailandia,...).

Dada la situación de escasas capturas que se vienen dando en los últimos años en el océano Atlántico, el nivel de precios que se viene experimentando en los últimos años no sino producto de la sobrepesca de túnidos realizada en aguas del océano Pacífico en el año 1999, en donde algunos atuneros obtuvieron rendimientos totalmente exagerados. Esta situación provocó un exceso de oferta en el mercado, con el consiguiente descenso de los precios, lo que contagió al resto de armadores.

Paralelamente a este exceso de oferta de atún a nivel mundial, se han producido en los últimos años determinados movimientos en el seno de las Organizaciones Regionales de Pesca (ORP) de túnidos de todos los océanos (IATTC-ICCAT-IOTC), tendentes a regular la pesca de atún con la ayuda de objetos flotantes ó DCP (dispositivos de concentración de peces, también llamados FAD ó plantados), que según los científicos vendría a ser el causante de la deteriorada situación de determinados stocks (especialmente del patudo).

Así por ejemplo, la IATTC ha establecido desde 1998 una cuota de pesca con DCP para el patudo, cerrándose esta pesquería en los años 99 y 2000 en cuanto se alcanza esta cuota (40.000 toneladas), así como la prohibición del uso de buques auxiliares (dedicados a colocar, recoger y mantener los plantados). En otros océanos, se están adoptando tímidos pasos en la regulación de la pesca al objeto, que no han pasado hasta el momento de adoptar cierres espacio-temporales de esta pesquería, caso del Atlántico, que hasta el momento se han mostrado totalmente ineficaces, por la ausencia de todo control hacia las flotas extracomunitarias, así como por la ausencia de datos científicos que avalen suficientemente la bondad de esta medida.

Si bien la captura del patudo es una pesquería accesoría para la flota atunera cerquera, al venir asociada al listado y rabil en las capturas con objetos flotantes, se producen ciertas capturas de esta especie, muy difícil de distinguir del rabil si se trata de ejemplares pequeños. A pesar de que esta especie no es objetivo de la pesquería atunero cerquera, sí lo es para la flota palangrera que faena en los mismos caladeros, la cual está tomando una postura muy beligerante contra la flota cerquera por las capturas de patudo que se realizan en esta pesquería.

Sin embargo, la realidad es que la flota atunero cerquera está realizando unos sacrificios cuantiosos en el cumplimiento de las regulaciones actuales de no pescar con objetos flotantes en determinados estratos espacio temporales, esfuerzo que no viene siendo correspondido por medidas similares por parte de la flota palangrera, la cual además de estar experimentando un crecimiento en los últimos años, no se poseen apenas datos de esta pesquería a comparación de lo que ocurre con respecto a la flota atunero cerquera comunitaria.

Esto está provocando una injusta situación a los armadores cerqueros europeos, por cuanto se les hace totalmente responsables de las medidas de gestión y conservación de una especie como el patudo accesoría para esta flota, mientras la flota que supuestamente va a obtener los réditos de las medidas de gestión sobre el patudo, crece sin control y sin adoptar ninguna medida para reconducir la situación del patudo. Y para más inri, resulta que la eficacia de la propia moratoria está siendo puesta en tela de juicio por los científicos de las ORP (véase el último informe del Comité Científico de la ICCAT bastante concluyente en este sentido), resaltando que la moratoria no está teniendo los efectos que se habían previsto para el stock de patudo.

Esto es especialmente grave, por cuanto que los armadores europeos llevamos realizando de buena fe moratorias sobre DCP espacio temporales desde 1997, con unas considerables pérdidas económicas para nuestra flota por la reducción de capturas experimentado al albor de la moratoria.

Todo ello sin embargo debe servir para realizar una seria reflexión sobre la problemática de fondo para una correcta gestión de los recursos atuneros, así como para que el mercado atunero siga gozando de buena salud.

A nuestro entender, gran parte de los problemas que el sector atunero viene padeciendo en la última década, están provocados por la aparición y posterior desarrollo galopante de la pesca con objetos flotantes. Si bien hoy por hoy el estado del stock de rabil y listado, especialmente este último, no revisten especial gravedad, los armadores debemos plantearnos donde nos está conduciendo la dinámica de la pesca con objetos flotantes: por un lado a situaciones de sobrepesca como ha sucedido en el océano Pacífico en 1999 y como ya sucedió en el año 91 en otros océanos, con la consiguiente depresión del mercado de túnidos experimentada en aquel año (a lo que habría que añadir la total desprotección aduanera que padece el armador en el mercado europeo); por otro lado, a que se adopten medidas como la moratoria que si en un principio se establecieron de buena fe por los propios armadores, están siendo mimetizadas por las ORP cuando el paso del tiempo está mostrando que son totalmente insatisfactorias para el fin que se persigue y con un gran coste económico para el armador.

Sería deseable en consecuencia, un debate en profundidad sobre la bondad de la pesca con objetos flotantes (DCP), a realizar por todos los armadores atuneros de los distintos océanos, para ver si mirando al futuro de la pesquería atunera, este tipo de pesca es o no conveniente para garantizar el futuro de los distintos stocks y la supervivencia de nuestras empresas.

L'APPROVISIONNEMENT DE L'INDUSTRIE COMMUNAUTAIRE DE TRANSFORMATION DU THON PAR LA PRODUCTION COMMUNAUTAIRE

MR. MICHEL DION

MANAGING DIRECTOR ORTHONGEL

Mesdames, Messieurs,

Avant de vous présenter quelques chiffres sur l'évolution récente de l'approvisionnement de l'industrie communautaire de transformation du thon par la production communautaire, permettez-moi de vous dire tout le plaisir que j'ai d'être parmi vous, dans le premier port de pêche européen, pour participer à nouveau à la Conférence Européenne du thon.

Je tiens à féliciter ANFACO pour cette excellente initiative et la remercier de m'avoir invité à y prendre la parole.

Quand on évoque la grande pêche thonière tropicale, on pense aux superbes thoniers senneurs congélateurs qui sillonnent la zone intertropicale des trois océans, à la recherche des grands migrateurs que sont le Yellowfin, le Skipjack et le Bigeye.

On voit également ces puissants navires décharger leurs précieuses captures dans des ports exotiques dont les pays évoquent plus des rêves de vacances sous les cocotiers: SEYCHELLES, MADAGASCAR, COTE D'IVOIRE, SENEGAL, THAILANDE, KIRIBATI, PAPOUASIE, etc...

Les personnes qui s'intéressent d'un peu plus près à la filière du thon tropical pensent souvent a priori qu'il s'agit d'une industrie délocalisée comme on en voit maintenant de plus en plus.

En matière de flotte, on entend même certains vitupérer contre l'Union Européenne qui exporte sur les pays tiers sa surcapacité de flotte.

Pour ce qui concerne le secteur du thon tropical, je m'inscris en faux contre ces appréciations ou allégations.

En effet, les thoniers senneurs congélateurs européens ne sont pas des navires de pêche qui auraient pêché le thon dans la mer communautaire et qui se seraient délocalisés, pour cause de surcapacité, pour aller pêcher le thon ailleurs. Non, bien au contraire, les thoniers tropicaux sont «tropicaux» dès l'origine, conçus et mis en œuvre pour cette activité.

Il en va de même des conserveries. Ce ne sont pas des conserveries européennes qui ont été démontées en Europe et remontées sous les tropiques, mais bien des usines qui ont été construites pour cette nouvelle activité, pour ce nouveau produit.

Certains nostalgiques pessimistes pourraient néanmoins prétendre que le développement de l'industrie de transformation dans les pays riverains des zones de pêche, s'est fait au détriment de l'industrie existante en Europe.

Certes, on aurait pu désirer que le thon tropical pêché par des navires européens soit entièrement ramené en Europe et transformé en Europe. Il est évident que ce désir est chimérique, fait fi des réalités économiques, techniques et politiques.

Pour autant, ceux qui pensent que toute la production de ces navires est débarquée dans les ports proches des lieux de pêche et transformée sur place se trompent également.

Les quelques chiffres que je vais maintenant vous présenter à l'aide de transparents prouveront que les thoniers senners congélateurs européens contribuent encore d'une façon significative à l'approvisionnement direct de l'industrie de transformation localisée en Europe.

1^{er} transparent: «Evolution des livraisons sur la Communauté Européenne de thon tropical pêché par les thoniers battant pavillon d'Etats membres de la Communauté».

Il s'agit de thon entier congelé. On constate sur ce graphique que le volume de yellowfin de plus de 10 kilos, qui en 1996 représentait à lui seul 77.600 tonnes, soit 53,7% du total livré, a chuté considérablement en 1997 et 1998 jusqu'à 38.000 tonnes.

Cette baisse n'est pas due à des considérations commerciales, mais tout simplement à une baisse de la production. Grâce à une reprise de la pêche de YF en 1999 et 2000, les livraisons ont pu être plus importantes et revenir à la première place en 2000, à hauteur de 64.500 T (42,3% du total).

L'évolution des livraisons de SK est plus surprenante. Elle traduit en effet une progression constante de 96 à 99, en passant de 43.500 T en 96 à 59.700 T en 1999, traduisant ainsi une progression de plus de 16.200 T (+37,2%).

Cette évolution dément les prévisions généralement faites par les meilleurs augures il y a dix ans. Il était en effet communément admis à l'époque que l'industrie de transformation du thon tropical en Europe était sur son déclin, et que sa seule bouée de sauvetage était la transformation de longues d'albacore.

Certes, cette prévisions s'est largement révélée bonne pour l'Italie et la France. En revanche, elle apparaît fautive pour l'Espagne car ces livraisons de SK (et comme d'ailleurs celles de petit yellowfin et de patudo) sont réalisées essentiellement sur ce pays.

Il faut ajouter que ces approvisionnements du marché communautaire para du thon communautaire sont essentiellement le fait de la flotte espagnole. En effet, sur les cinq dernières années, si la France représente en moyenne 26,3% des approvisionnements en Yellowfin communautaire (c'est-à-dire un gros quart), elle est pratiquement absente sur les autres espèces qui sont donc fournies essentiellement par la flotte espagnole sur le marché espagnol (97% pour le skipjack, 98% pour le petit yellowfin, 94% pour le bigeye, 81% pour l'albacore).

Ainsi ces chiffres montrent que non seulement le marché communautaire reste significativement approvisionné par la flotte communautaire, mais aussi et surtout que le marché espagnol a développé ses fabrications à partir de skipjack, bigeye et petit yellowfin espagnol.

Les conserveurs et armateurs espagnols présents dans cette salle nous diront peut être comment et pourquoi ils ont pu déjouer les prévisions des meilleurs futurologues de la profession. C'est en tout cas une question que je me permets de leur poser.

Les chiffres qui n'apparaissent pas sur ce schéma sont les totaux toutes espèces et tailles confondues. Je vais donc vous les donner maintenant:

1996		144.600 Tonnes
1997		129.200 Tonnes
1998		123.000 Tonnes
1999		142.700 Tonnes
2000		152.500 Tonnes

Comme je vous le disais tout à l'heure, ces chiffres sont tout à fait significatifs et traduisent même un regain certain.

— oOo —

A l'aide du deuxième transparent, je vais maintenant vous montrer l'évolution générale des marchés du monde que la plupart d'entre vous ont présente à l'esprit: forte montée des prix du yellowfin du début 96 à la fin 97, suivie de l'écroulement soudain et brutal de l'été et de l'automne 1998 qui s'est fait plus sentir sur le prix moyen de 1999.

Je vous disais tout à l'heure que la baisse des livraisons de Yellowfin n'était pas due à un problème commercial mais à une baisse de la production.

La superposition des transparents 1 et 2 vous le prouvent puisque les courbes des tonnages vendus et des prix sont exactement inverses.

Le transparent n° 3 reprend, avec une autre échelle, l'évolution du prix de vente du seul yellowfin européen sur le marché commun.

Ce changement d'échelle montre mieux l'amplitude impressionnante des variations du prix de vente du yellowfin européen de plus de 10 kg sur l'Europe.

Partant de 989 Euros/TM au 1^{er} trimestre 1996, le prix a atteint 1.700 Euros au deuxième trimestre 1998.

La fiddérence de 711 Euros représente une hausse de prix de 72%!...

Malheureusement pour les armateurs, la chute a été encore plus rapide, plus brutale et plus profonde que la hausse.

En effet, partant de 1.700 Euros/TM au deuxième trimestre 1998, le prix est tombé à 948 Euros au quatrième trimestre 99. La différence est cette fois de 752 Euros, et représente une baisse de 44%.

Heureusement cet abysse a été de courte durée et le prix a tourné autour de 1.100 Euros sur le premier semestre 2000.

Si mes sources statistiques, c'est-à-dire celles de la Commission des Communautés, s'arrêtent en 2000, j'ai fait figurer sur ce schéma les prix moyens de vente obtenus par le thon français, aux premier et deuxième trimestres de cette année; Ces prix traduisent une nette tendance haussière.

Vous voyez sur ce transparent (losanges rouges) apparaître les prix moyens annuels suivants:

- 1.078 Euros pour 96
- 1.408 Euros pour 97
- 1.592 Euros pour 98
- 1.163 Euros pour 99
- 1.111 Euros pour 2000

ainsi que le prix moyen des trois dernières années 98-99-2000 (point noir) qui ressort à 1.247 Euros/TM.

Il est évident que de telles amplitudes de variation des prix de vente ne sont bonnes pour personne et que tout doit être fait pour stabiliser le marché.

— oOo —

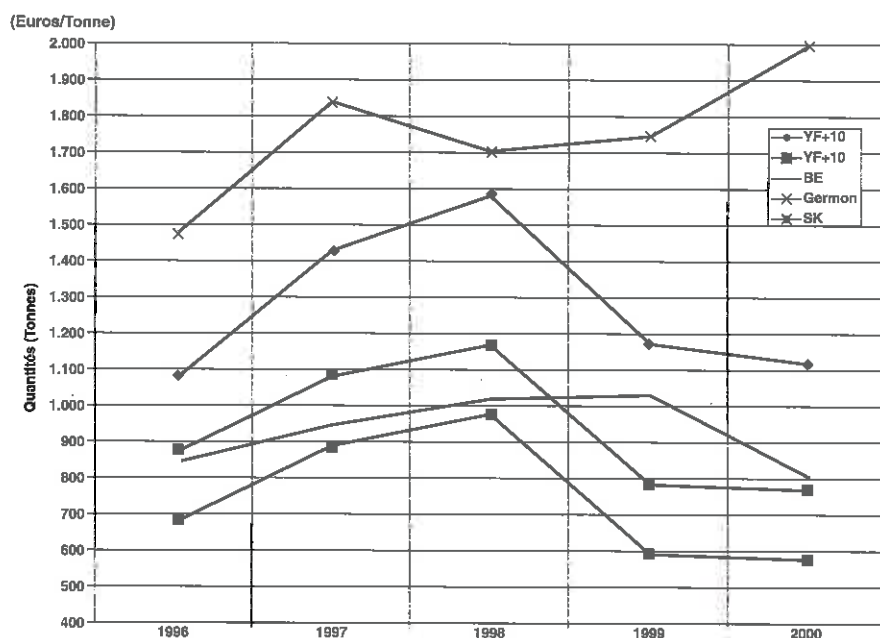
C'est dans cet esprit qu'ORTHONGEL a pris l'initiative, en juillet 2000, d'inviter à PARIS les armateurs de thoniers senners des principaux pays producteurs, et qu'a été créée à GUAYAQUIL le 2 mars 2001 la World Tuna Purse Seiner Organisation (W.T.P.O.) et qu'ont été prises des mesures de réduction de la production de skipjack.

Les premiers résultats de ces mesures sont positifs et prometteurs et les armateurs ont ainsi clairement montré et démontré qu'ils ne voulaient plus subir passivement les crises successives du marché du thon, et qu'ils entendaient prendre des mesures propres à les éviter ou à en atténuer les effets.

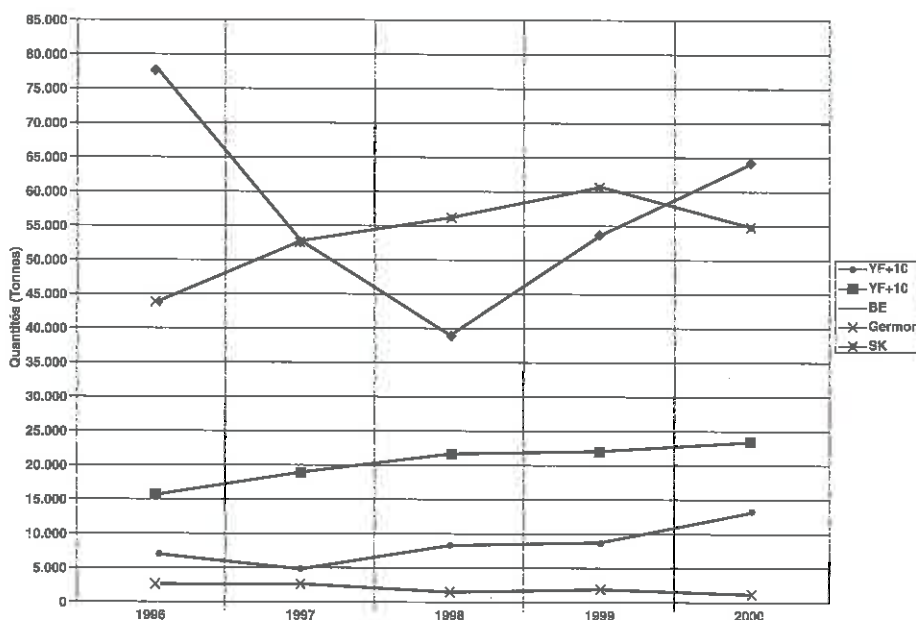
Les conserveurs n'ayant rien à gagner et tout à perdre des brutales variations du marché devraient s'associer aux efforts des armateurs et rechercher avec eux les meilleures mesures structurelles de long terme, capables de les éviter.

— oOo —

Evolution des Prix Moyens de Vente de la production communautaire sur la C.E.E.

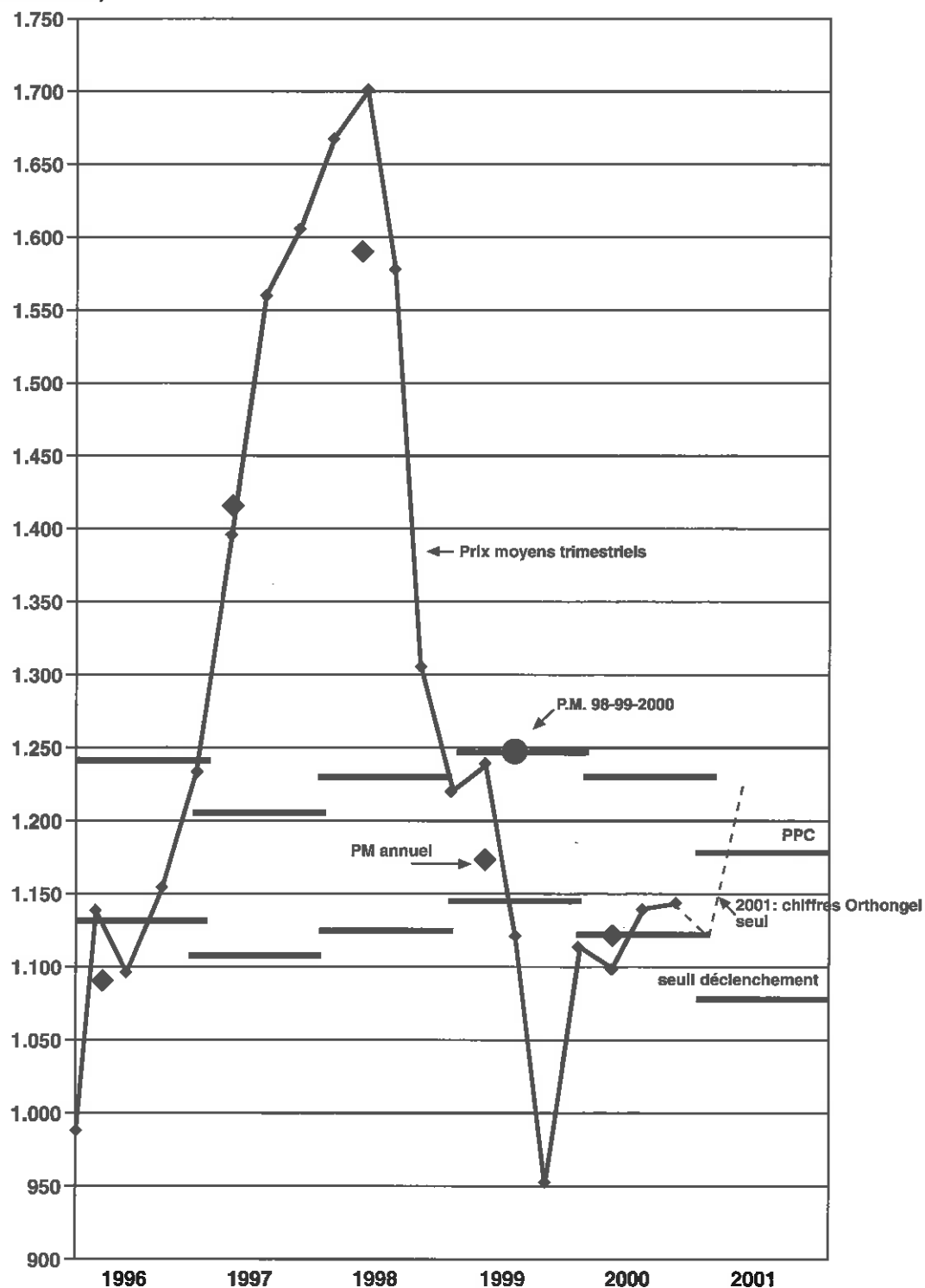


Evolution des livraisons sur la Communauté Européenne de thon tropical pêché par les thoniers battant pavillon d'Etats membres de l'U.E.



Evolutions comparées du prix moyen trimestriel de vente de la production communautaire de YF+10 kg sur la C.E., du PPC et du Seuil de déclenchement du droit à l'indemnité

(Euros/Tonne)



PONENCIA / *SESSION*

5

**LOS AVANCES TECNOLÓGICOS APLICABLES A LA
PESCA, TRANSFORMACIÓN Y COMERCIALIZACIÓN DEL
ATUN**

***TECHNOLOGICAL INNOVATIONS APPLICABLE TO
FISHERIES, TUNA PROCESSING AND
COMMERCIALIZATION***

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AVANCES TECNOLÓGICOS APLICABLES A LA PESCA.

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La innovación tecnológica influye decisivamente en el incremento de productividad de las unidades pesqueras así como en la mejora de las condiciones de vida en la mar.

Hace no muchos años para contactar con un barco en la mar se tenía que recurrir a las estaciones costeras de radio y a través de ellas lograr unas comunicaciones, de muy baja calidad, y además totalmente inseguras en cuanto a la confidencialidad de las conversaciones. Realmente todos los armadores llegamos a inventar nuestro propio idioma en clave para poder hablar sobre la pesca, zonas de pesca, capturas y situaciones de otros buques.

Hoy en día no solo podemos mantener una conversación telefónica segura a través de los teléfonos que tenemos instalados a bordo de los barcos; ya sean Standard A, B o Mini M, sino que a través de éstos y del Standard C, podemos enviarnos correos electrónicos, archivos informáticos y todo tipo de informaciones a muy bajo coste. Aparte de la evidente mejora en los aspectos operativos de la faena de pesca, gracias al contacto claro directo y absolutamente confidencial con el Armador, se da otra ventaja muy importante que es la posibilidad de que los tripulantes de los buques puedan estar en contacto con su familia, con las ventajas anteriormente expresadas, a un coste cada día más bajo. (Esto beneficia enormemente las relaciones humanas a bordo y elimina tensiones)

Estos logros han dado paso a que hoy en día no nos limitemos solo al envío de información por e-mail, sino que también y gracias a las cámaras fotográficas digitales, podemos ver casi en tiempo real, por ejemplo, el tamaño medio del pescado del lance ejecutado a primera hora de la mañana o la fotografía por qué no a través de una cámara e Internet, contemplar como se está realizando la maniobra de pesca; y en cualquier momento iniciar una videoconferencia entre el patrón y el armador del barco.

Por otro lado sus aplicaciones en el terreno de la medicina son también impresionantes. Hoy no solo podemos mandar por línea telefónica un electrocardiograma de un tripulante enfermo sino que también se puede concertar una consulta entre médico y paciente a través de la videoconferencia. En este mismo sentido los nuevos sistemas de telemedicina nos permiten monitorizar y estabilizar a un paciente gravemente accidentado controlando, su temperatura, presión arterial, ritmo cardíaco y saturación de oxígeno. (COMITAS)

En el terreno de los aparatos de detección de pesca los avances tecnológicos no han sido menos impresionantes.

Hoy en día existen sonares con una potencia y discriminación que hace tan solo 10 años eran absolutamente impensables. Actualmente disponemos de sonares "inteligentes" que pueden ser configurados de forma independiente para diferentes condiciones de mar teniendo en cuenta la altura de la señal, discriminación, distancia y los diferentes filtros estabilizadores para evitar la incidencia del mal tiempo en la presentación de las señales en pantalla.

Con respecto a los radares el salto tecnológico también ha sido muy importante, hoy en día hay equipos que son capaces de detectar pequeñas balizas y pájaros a unas distancias a las cuales hace unos pocos años era muy complicado detectar grandes petroleros. Independientemente de su potencia también es digno de reseñar la gran cantidad de opciones que ofrecen los radares de hoy en día en lo relativo a opciones de ploteo y control de velocidad rumbo etc... de los buques y/o balizas que se detectan.

Otro aspecto tecnológicamente destacable y que en mi opinión es lo que más influye en el sensible aumento de la productividad es todo lo relativo a la detección de pescado, por medio de radiobalizas.

En un principio, se comenzaron a utilizar balizas con un transmisor de radio; que emitía una señal cuando se le disparaba desde abordo mediante un código; este avance tecnológico aplicado a la pesca ha ido tecnificándose paulatinamente hasta límites insospechados, hoy en día las balizas, envían una señal codificada por radio con la posición de la baliza obtenida mediante un GPS instalado en su interior.

Incluso hay boyas que en la actualidad no solo llevan un GPS sino que además de esto llevan un Standard para enviar la posición por teléfono vía satélite e incluso una sonda para detectar a distancia si esa boya en cuestión tiene pescado debajo ó no.

La carrera de la tecnificación no tiene final, siempre habrá alguna empresa que se dedique a investigar nuevas tecnologías aplicables a la pesca y cada día estaremos más mejor preparados para competir en este difícil mercado. El reto que tenemos por delante no es otro que saber conjugar todos estos avances tecnológicos con la sustentabilidad de los recursos y de los mercados.

LAS TENDENCIAS MUNDIALES Y LOS AVANCES TECNOLÓGICOS EN LA PRODUCCIÓN, PROCESAMIENTO Y COMERCIALIZACIÓN DEL ATÚN

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A) Introducción:

Durante los últimos años han ocurrido importantes eventos sociales, culturales y tecnológicos de tanta significación que han tenido un impacto directo en la vida de todas las naciones del Mundo, provocando cambios sin precedentes en la humanidad y que obviamente se han reflejado en los aspectos económicos de todos los países. El inicio del Siglo XXI está claramente marcado por tres aspectos fundamentales denominados las Megatendencias: a) Globalización de la Economía, b) Masificación de la Información y c) Conservación del Medio Ambiente. Estas tendencias marcan su influencia también en la industria alimenticia, incluyendo la producción, procesamiento y comercialización de túnidos. ¿Están los avances tecnológicos en capacidad de asumir estas tendencias? ¿La industria del atún podrá asumir los retos del Consumidor del futuro? Son estas preguntas que debemos intentar responder en virtud de la permanencia misma de nuestro sector.

B) Tendencias Mundiales:

Las tendencias mundiales son corrientes a nivel global que dominan el acontecer económico de las naciones y que de alguna manera describen las características futuras y el rumbo visionario de la humanidad. Se han realizado varios estudios sobre las corrientes que determinarán estas tendencias para los próximos años. De un análisis general se describen las más importantes direcciones, principalmente del área económica que tendrán una influencia definitiva en nuestro sector.

1.- Condiciones de Inestabilidad Mundial

Los cambios políticos, económicos y tecnológicos de los últimos años han dado origen a un mundo cuyas estructuras de poder aún están por definirse. Inestabilidad Financiera, Bloques Económicos, Hegemonía de los EEUU, Ampliación de la unificación Europea.

2.- Redefinición del concepto de Competencia

El enfoque empresarial de las últimas décadas enfatizaba una mejor posición competitiva basada en la innovación por medio de la tecnología de productos, actualmente y aún mas en el futuro mediano, el énfasis estará en mejorar la competitividad a través de la tecnología de procesos (métodos más eficientes, reducción de costos, estandarización de productos, mejoramiento de la calidad de productos y servicios).

3.- Internacionalización de las Empresas

Las empresas están buscando nuevos mercados aprovechando los avances de los acuerdos de libre comercio y la globalización de la economía.

4.- Universalidad del Estilo de Vida con Nacionalismos Culturales

Aparece una cultura mundial favorecida por el auge de las comunicaciones, las facilidades para los

viajes y la democratización de la información. Incremento del turismo, crecimiento de franquicias, crecimiento del intercambio comercial, la influencia del idioma inglés son sus manifestaciones más palpables.

5.- Crecimiento Explosivo de las Comunicaciones

Hay un incremento sin precedente de la facilidad de acceso a la información a nivel mundial. La Internet, la telefonía celular y satelital, están dibujando el futuro de la nueva economía, de la nueva industria, del nuevo consumidor.

6.- Auge de la Tecnología Biológica

Desarrollo de la ciencia y la tecnología basados en la Biología, especialmente en la biotecnología e ingeniería genética, con efectos directos en la medicina, la agricultura, la ganadería, la alimentación, entre otros.

7.- Desarrollo de Sistemas con Toma de Decisión Autónoma

El auge de la inteligencia artificial y la proliferación de herramientas computarizadas que facilitarán la toma de decisiones rápidas y autónomas, tendrán una amplia aplicación en todas las áreas de la economía.

8.- Preocupación por el Medio Ambiente

Una mayor atención mundial sobre los problemas medioambientales se traducirán en mayores restricciones en nuevas tecnologías y patrones de consumo.

9.- Redefinición del Papel de la Mujer

Los cambios en los patrones sociales y demográficos de la población tanto en países desarrollados como en vías de desarrollo, con un mayor rol de la mujer, provoca nuevos patrones de consumo y comportamiento.

10.- Redefinición del Rol del Estado

Tendencia mundial de los gobiernos a cambiar de una manera significativa su rol en la actividad económica para permitir iniciativas privadas en todas las áreas.

11.- Democracia y Pluralismo

El aumento de la pluralidad del pensamiento, la libertad religiosa y la democracia como esquema político básico se combina con la coexistencia de nacionalismos culturales y religiosos.

12.- Énfasis en la Educación y la Cultura

Aumenta el interés global por la educación y la cultura en sus más diversas expresiones, como base del desarrollo. Se apoya en el auge de las comunicaciones y la información.

13.- Agudización de las Diferencias Norte-Sur

El incremento de la brecha económica entre los países desarrollados y aquellos en vías de desarrollo o entre regiones de un mismo país. Procesos migratorios, división cultural.

14.- Reestructuración de la Economía

Aumento relativo en el tamaño y la composición del sector servicios en comparación con los sectores manufacturero y primario.

C) Tendencias en la Industria del Atún

Según Harry Balzer “en los próximos años, la industria de alimentos debe centrarse en dos prioridades básicas: Producir alimentos que ofrezcan mas facilidad al Consumidor y producirlos más económicos para que estos Consumidores los adquieran”. Sin embargo, en la industria de los alimentos, incluyendo la de la producción, procesamiento y comercialización de atún, se describen una serie de tendencias claramente identificables y cuáles serán los aportes tecnológicos actuales, en desarrollo o futuros que nos permitirán alcanzar estos retos.

01.- Mayores restricciones sobre las fuentes de Materia Prima

Por una parte, la mayor demanda de productos presionará la necesidad de mayores fuentes de abastecimiento, pero por otro lado, más estrictas normativas internacionales para la sustentabilidad de los recursos y la presión de estados ribereños por intensificar sus derechos sobre los recursos, limitarán la expansión de la industria. Los países con disponibilidad de recursos propios incrementarán su importancia relativa en el sector.

Tecnologías: Tecnologías de Pesca Selectivas y Polivalentes, Sistemas de Información Global, Biotecnología aplicada a Túnidos,

02.- Internacionalización de la Empresas

Una mayor competencia se incrementará con la entrada de nuevos actores internacionales animados por la eliminación de protecciones arancelarias. Las empresas locales exitosas deberán ampliar sus mercados, principalmente a países emergentes. Este proceso se sustentará más en la incorporación activa en la operación de pesca y procesamiento en estos países, inclusive con ventajas competitivas, que a simples operaciones comerciales.

Tecnologías: Plantas de Procesamiento Flexibles, Tecnologías de Proceso, Comunicación Global

03.- Consolidación a través de toda la Cadena de Valor

La industria experimentará cierta racionalización y consolidación. Las oportunidades de reducción de costos y sinergias animarán las fusiones. Las alianzas estratégicas a todo lo largo de la cadena de valor desde los productores atuneros hasta los comercializadores crearán un nuevo marco estratégico.

Tecnologías: Tecnologías de Logística de Cadenas de Suministros

04.- Adaptación a las Necesidades Locales

Se establecerán ciertos patrones globales pero se desarrollarán productos que satisfagan los hábitos y usos locales. Las comunidades étnicas en muchos países se convertirán en grandes áreas de oportunidad.

Tecnologías: Internet/Web TV, Consumidor en Línea, Modelos de Conducta de Consumo.

05.- Demanda permanente de Innovación y Valor Agregado

La innovación será la clave del crecimiento futuro. Anticipar las demandas de un Consumidor cada vez más exigente y especializado y satisfacer sus necesidades serán el reto del futuro. Los alimentos diseñados de manera personalizada representarán un área de oportunidad para muchas empresas de alimentos locales. Los costos para estudios sobre hábitos y tendencias del consumidor se elevarán significativamente, a fin de permanecer en línea con esta tendencia.

Tecnologías: Tecnologías de Mercado, Tecnologías propietarias, Investigación del Consumidor

06.- Segmentación del Consumidor

Los nuevos modelos de demanda del consumidor emergerán del cambio generacional. Mientras que las categorías de mayor edad mantienen valores tradicionales, la generación electrónica dominará el escenario y los mas jóvenes se adaptarán mas rápidamente. El mayor crecimiento en los consumidores estará en parejas de tercera edad, mujeres solas, familias de mediana edad y familias de un solo padre-madre, creando demandas de productos y servicios alimenticios nuevos.

Tecnologías: Tecnologías de Proceso, Investigación del Consumidor, Consumidor en Línea

07.- Presión Continua sobre los Precios de los Productos Convertidos

El crecimiento de la industria será lento y como consecuencia una agresiva reducción de costos deberá ser necesaria. El consumidor del futuro deseará pagar por el producto mas no por el empaque, generando presiones sobre estos fabricantes. Igualmente la presión se extenderá hacia los productores. La cadena se reducirá a su mínima extensión desapareciendo las empresas de servicio de intermediación.

Tecnologías: Cadena de Suministros, B2B, S2P, P2C, Empaques flexibles, Pauched.

08.- Proliferación de Marcas

El proceso de globalización e internacionalización de empresas, traerá como consecuencia un incremento en la proliferación de marcas. Sin embargo, aunque perderán importancia relativa, la fortaleza de marcas globales y marcas locales de tradición se mantendrán a un alto costo comunicacional.

Tecnologías: Web TV, Comunicación Global,

09.- Estándares de Calidad e Inocuidad Globales

Los eventos sucedidos en los últimos años, han producido una alerta internacional en relación al tema de seguridad e inocuidad de los alimentos. Se establecerán normativas y regulaciones aceptadas e impuestas internacionalmente bajo la coordinación de organismos internacionales tales como ONU/FAO, ISO, FDA, CU.

Tecnologías: Sistemas de Trazabilidad Global, Sistemas Internacionales de Calidad ISO-HACCP, Eco etiquetado, Sistemas Digitales de Análisis.

10.- Aumento del Consumo de Alimentos Funcionales

La mayor preocupación por la salud orientará a los consumidores a buscar un valor agregado nutricional y funcional en los alimentos que consumen, aupada por una masiva comunicación sobre los atributos de estos productos. Esta tendencia se convertirá en oportunidades para la industria de alimentos pero también para la farmacéutica. Importantes alianzas y fusiones entre ambos sectores se realizarán a nivel mundial.

Tecnologías: Biotecnología, Tecnología de Inyección, Ingredientes

11.- Alimentos con Certificado de Origen

Si bien el proceso de globalización permitirá la entrada de productos alimenticios provenientes de los más distantes lugares, la tendencia del consumidor y de los comercializadores es la de poner mayor énfasis en la Certificación de Origen como valor diferenciador de los productos. Normativas y regulaciones internacionales impulsarán esta necesidad de exponer a la vista del consumidor no solamente el origen del producto procesado sino también de las materias primas, ingredientes y empaques.

Tecnologías: Chips de Información, Verificación ADN, Software Trazabilidad

12.- Alimentos Ambientalmente Preferibles

El consumidor del Siglo XXI posee un alto grado de concientización sobre el tema medioambiental, debido a la presión de organismos ambientalistas y su divulgación global en los medios de comunicación. Las normativas internacionalmente aceptadas se convertirán en estándar obligatorio para el comercio de alimentos, creando presión y costos adicionales en tratamiento de desechos y emanaciones, empaques y procesos ambientalmente aceptados.

Tecnologías: Empaques reusables, biodegradables, rápidamente biodegradable,

13.- Alimentos Congelados vs Procesados

La importancia relativa de los alimentos básicos está cambiando. La importancia de los cárnicos especialmente de carnes rojas declinará dramáticamente. Las aves de corral, el pescado, las verduras y frutas tendrán mayor relevancia. Los productos frescos, refrigerados y congelados prevalecerán sobre los procesados. Una mayor preocupación por la salud y la seguridad de los alimentos impulsará este cambio.

Tecnologías: Procesos de bajo impacto, refrigeración y congelación segura,

14.- Incremento del Consumo Fuera del Hogar

Los nuevos estilos de vida, impulsarán aún mas los productos para comer fuera de casa, pero con algunas variantes. Más nutritivos, mas seguros, más cómodos y fáciles para consumir, con menos empaques que desechar. El gasto del consumo de alimentos fuera del hogar impulsará aún más estos formatos del "Home Meal Replacements" como los Listos para Comer.

Tecnologías: Envases esterilizables biodegradables, cierres resellables, empaques auto calentados.

D) Estrategias Tecnológicas

Como consecuencia de estas tendencias, se plantean las estrategias tecnológicas más relevantes para el sector de alimentos y en especial para la industria del atún:

- Crear una fuerte plataforma tecnológica tanto de extracción como de manufactura, con énfasis en la tecnología de procesos.
- Apalancar el desempeño en reducción de costos y mejoras continuas de la productividad con el desarrollo de tecnologías propietarias y de mercado.
- Impulsar el posicionamiento con procesos de innovación a todo nivel y la mayor capacitación del recurso humano
- Buscar el liderazgo tecnológico y el desarrollo de productos específicos
- Ampliar e integrar las cadenas de suministros con tecnologías basadas en Internet
- Enfocarse en proposiciones de alto valor agregado basadas en las tendencias del mercado y la permanente consulta del consumidor utilizando tecnología comunicacional.

E) Conclusiones

El futuro es hoy, los cambios se están produciendo a una velocidad que sobrepasa nuestra propia capacidad de respuesta. Muchas de estas tendencias son hoy día hábitos en desarrollo del consumidor actual. La industria del atún tal vez enfrente el mayor reto de su historia, aprovechar las oportunidades que

se desprenden de una tendencia mayor del mercado hacia productos naturales, sanos, nutritivos y apreciados por el consumidor evitando las amenazas de la presión ambientalista, el impacto de los procesos térmicos, el rechazo por los empaques de alto costo, poco valor percibido y ambientalmente cuestionables.

Los avances tecnológicos puestos a disposición por la tecnología de mercado, pero principalmente los procesos de innovación que generen tecnologías propietarias lograrán capitalizar estas oportunidades y relanzar con éxito una industria de vital importancia desde el punto de vista económico y social, tanto por su repercusión laboral como de seguridad alimentaria.

PONENCIA / *SESSION*

6

LA EMPRESA ATUNERA EN EL MERCADO GLOBAL. SITUACIÓN ACTUAL Y OPCIONES DE FUTURO DEL MERCADO DEL ATÚN A NIVEL EXTRACOMUNITARIO *THE TUNA COMPANIES IN A GLOBAL MARKET. PRESENT SITUATION AND FUTURE PERSPECTIVES TO TUNA MARKET OUTSIDE THE EUROPEAN UNION*

Mr. CHRISTOPHER LISCHEWSKY,

PRESIDENT AND CHIEF OPERATION OFFICER BUMBLE BEE SEAFOODS INC.

D. ANTONIO SUÁREZ GUTIÉRREZ,

PRESIDENTE DE GRUPOMAR

D. GERARDO LOJEDO,

DIRECTOR OPERATIVO DE COMEXTUN

Mr. JOEL NAGEON DE LESTANG,

SEYCHELLES FISHING AUTHORITY

Mr. DATO TAN BOON PIN,

CHAIRMAN TROPICAL CANNING PUBLIC CO. LTD.

Mr. FRANCISCO TIU LAUREL JR.,

PRESIDENT FRABELLE FISHING CORPORATION

Mr. HERMAN T. GEBAUER,

GENERAL MANAGER COS SAMOA PACKING

MODERADOR:

D. LORENZO BLANCO REFOJOS,

DIRECTOR GENERAL DE THENAISIE-PROVOTÉ S.A.

THE UNITED STATES TUNA INDUSTRY IN A GLOBAL MARKET

PRESENT SITUATION AND FUTURE PERSPECTIVES

MR. CHRISTOPHER LISCHEWSKI
PRESIDENT AND CHIEF OPERATION OFFICER
OF BUMBLE BEE SEAFOODS INC.

The United States continues to be the world's largest market for canned tuna with consumption estimated at about 46 million cases. This represents approximately 28 percent of global consumption that we estimate to be about 165 million cases.

Europe, in total, is a larger market than the U.S. with consumption estimated at 55 million cases, or 34 percent of global consumption. The 'big 5', Italy, France, Spain, the United Kingdom and Germany are the largest markets.

Following the U.S. and Europe, the other major consumers include Japan, South Korea, Canada and Australia. Combined with the U.S. and Europe, these 'developed' nations represent more than 75% of global canned tuna consumption.

As we move into the future, we believe the tuna industry will continue to globalize. Substantial markets have already emerged in Mexico, the Middle East and Latin America and as disposable income increases, we expect canned tuna consumption to expand.

The favorable global outlook for tuna consumption is not currently being shared in the United States market. If we look back to 1980, the U.S. commanded a global market share of about 40 percent. However, since then our market growth has been stagnant and over the last eight years, retail consumption has declined at the rate of about 1.1 percent per year. In fact, retail consumption has been down six of the last eight years.

Despite the decrease in retail sales, total consumption in the United States is up slightly over this eight year period when we consider the emergence of 'Alternate Channels'. Alternative Channels, which will be discussed in more detail later, include Drug Stores, Mass Merchandisers and Club Stores. These 'alternate' classes of trade have begun to carry food items and represent an increasing share of U.S. food sales.

The stagnation in U.S. canned tuna consumption can also be viewed in terms of per capita consumption where the U.S. now lags all of Europe's 'Big 5' markets, with the exception of Germany.

Canned Tuna Per Capita Consumption

Market	Kgs/Person
USA	1.6
France	1.6
Germany	0.7
Italy	2.1
Spain	2.5
United Kingdom	1.8

Source: AC Nielsen, NMFS, Eurostat, Bumble Bee Estimates and analysis

What is interesting to note is that tuna consumption has declined despite tremendous 'deflation' in retail pricing. We have analyzed the prices paid by consumers of canned tuna over the last twenty years. When adjusted for inflation and changes in can sizes, a case of tuna that sold for \$43 inflation-adjusted dollars in 1980 sold for a little more than \$20 dollars in 2000. This represents a 'real' decline in retail prices of 53 percent!

This deflation is further evidenced by U.S. retail pricing relative to other major international markets. U.S. pricing per kilogram at \$3.47 per case, is the lowest of all the markets we evaluated – even lower than Germany. On the high end is Italy with tuna prices that are almost double those in the United States. France and Australia also enjoy significant premiums while Spain and Germany have begun to approach U.S. levels.

Canned Tuna Per Price Comparison

Market	U.S. \$ /Kg
USA	3.47
Australia	5.50
Canada	4.06
France	6.05
Germany	3.50
Italy	6.57
Spain	3.54
United Kingdom	4.43

Source: AC Nielsen - May 2001, Bumble Bee Estimates and analysis

It should be noted that this analysis is based on May, 2001 data and the U.S. price comparison benefits from a strong dollar. If we were to take a more 'normal' exchange rate at 150 pesetas to the dollar, versus 192 pesetas to the dollar in May of 2001, the Spanish premium would be 29 percent instead of the two percent shown on this chart.

The pricing deflation in the U.S. market has changed what was once a very prosperous branded business to a basic commodity. Over the last twenty years, a correlation of selling prices and fish prices show that net pricing for the branded tuna companies is down about \$6.75 per case – or 35%. To put this in perspective, if the U.S. tuna industry had held prices at 1980 levels, the profitability of the industry would be higher by \$250 million. Imagine how healthy the U.S. market would be if we invested 25 percent of this against the consumer!

The deterioration of pricing has led to lower profit margins for all tuna brands. The first casualty of this has been consumer marketing. Over the last ten years, the entire U.S. canned tuna industry has spent an average of only \$1.3 million on consumer advertising. This represents less than one tenth of one percent of sales.

The second casualty has been product quality. What used to be an attractive, solid pack of lightmeat tuna – similar to what you have in Europe – has turned into a wet fish cake that can't hold its form on a plate. To help reduce costs as selling prices eroded, suppliers to the U.S. industry have increasingly used 'broth' made from hydrolyzed vegetable protein to bind water to the muscle tissue of the fish. While this has enabled the U.S. industry to reduce fish fill – and product cost – the impact on product appearance and perceived quality has been extremely negative

Along with elimination of consumer marketing and deterioration of product quality, the U.S. tuna industry has failed to innovate tuna and we have not brought any new 'excitement' to the tuna category. Unfortunately, the rest of the food industry has not stood still and there have been significant breakthroughs in food technology that we have not participated in.

If we look back to 1980, the primary use for canned tuna was to make tuna sandwiches for lunch con-

sumption. Today, twenty years, later little has changed and our product is still the same – albeit our quality is not as good. We still have the same steel can with a paper label. We don't have an EZO end and have done little to enhance convenience or expand usage occasions.

While canned tuna used to be a staple of the American lunch menu, today it is being replaced by chicken, pork and turkey. Furthermore, many new grocery products have been introduced that provide a more convenient, ready-to-eat meal solution.

The emergence of the microwave oven has also become an alternative for U.S. tuna consumers. Today, virtually every U.S. household has a microwave oven that provides simple and quick hot meal solutions for either lunch or dinner.

Perhaps most distressing is the fact that the U.S. tuna industry has not adapted to a change in U.S. consumer lifestyles. With more families having two working adults and children involved in a variety of after-school social activities, the traditional family meal is a thing of the past. The trend is to more 'out of home' eating and this has led to the explosion of fast food and other family style restaurant chains. Few of these meal providers offer recipes that utilize tuna.

These three factors – lack of consumer advertising, deterioration of product quality and insufficient product innovation – explain a sharp drop in annual eating occasions for canned tuna. In 1990, the average U.S. consumer ate canned tuna 13.3 times per year. In 2000, this average dropped to 10.2 times – a drop of close to 25 percent!

Over the last two years stability has begun to re-emerge in the U.S. tuna industry with new, financially stable ownership of both Bumble Bee and Chicken of the Sea. With this new ownership has come a common recognition of the dilemma that we face in the U.S. canned tuna marketplace. Working independently and through the U.S. Tuna Foundation, members of the U.S. tuna industry are embarking on three initiatives to revitalize our business. These three initiatives are improved product quality, enhanced product innovation and commencement of a category growth campaign.

We have already made significant progress in achieving our first initiative to improve product quality. Earlier this year, all three major brands approved a petition to the U.S. Food and Drug Administration to tighten the Standard of Identity for canned tuna. There are two key changes that we are recommending in the new Standard.

The first change is to move to a drained weight standard for measuring fish content. 'Drained weight' is the predominant method used by all major tuna consuming nations today. The U.S. currently uses a practice referred to as 'press cake' to regulate fish content. This is an obsolete practice that has not been adequately enforced by FDA for some time.

The second is to eliminate the use of hydrolyzed vegetable protein and limit the amount of other broth solids that can be introduced into a can of tuna. While this move will require the industry to put more fish back in the can – and increase product cost — this step is critical if we are to drive an improvement in product quality. Importantly, by amending the Standard of Identity this requirement will apply to all canned tuna sold in the U.S. and will ensure a level playing field for all competitors in the U.S. market.

The petition to amend the U.S. standard of identity for canned tuna was filed in May of this year and has received preliminary approval from the FDA. Unfortunately, the FDA prioritizes all of its various issues and those that involve food safety have priority. This new tuna standard of identity is not a food safety issue and could therefore take up to eighteen months to move through to approval. We are trying to apply political pressure to make this happen sooner.

The second initiative, product innovation, is being addressed independently by each of the three major brands. While there are a number of new items being introduced, the biggest innovation has been the 'tuna pouch' which was introduced by Starkist in the fourth quarter of 2000. This product meets consumer

requirements for convenience as it is 'drain free' and does not require a can opener. Bumble Bee introduced a similar pouch in the first quarter of 2001 and Chicken of the Sea has recently introduced a tuna salad kit which combines a tuna pouch with salad dressing and bread crumbs – all the ingredients necessary to make a tuna salad.

There was tremendous excitement prior to the launch of the tuna pouch – both by the tuna companies and the retail trade. The product had received tremendous consumer response during concept and product testing and the expectations were high. However, the results to date have been disappointing. Despite a significant marketing investment by each of the three brands – especially by StarKist – the pouch has gained less than a two percent volume share of the market place. While there have been several volume 'spikes' related to television advertising and price reducing coupons, the product is not having the volume impact that was expected.

The poor sales performance of 'pouch' is primarily due to consumer resistance to a significantly higher price point. While the product has several good features, it sells at a significant premium to the can. Adjusted for net weight, the 200 gram chunk light pouch sells at a 190 percent premium to the 170 gram chunk light can and the 200 gram chunk white albacore pouch sells at a 94 percent premium to the 170 gram chunk white can.

We are all working aggressively to reduce the cost of the pouch. However, based on current technology and packaging costs, it will be difficult to have a significant impact on the pricing disparity between the pouch and the can.

While the pouch has not had the initial success that we had hoped for, it is still early in its life cycle. Importantly, introduction of this product by StarKist has seemed to reinvigorate the rest of the industry and all of us currently have a number of new product initiatives in the pipeline.

While improving product quality and innovating our product are critical components of our industry revitalization effort, perhaps most critical is our third initiative – implementation of a U.S. category growth campaign.

With the lack of consumer advertising and product innovation over the last ten years, the consumer has forgotten about canned tuna. Furthermore, most of what the consumer hears about tuna is negative – dolphin safe, by-catch, methyl mercury.

We are not the only food category facing this dilemma. However, a number of the other categories have taken proactive steps to reverse the situation. Aggressive category growth initiatives have been introduced by the cheese industry, the beef industry and the pork industry. Perhaps most successful is the 'Got Milk' campaign whose objective is to stem the decline in U.S. milk consumption. While milk consumption is not increasing, the Got Milk campaign has stemmed a ten year consumption slide and has resulted in the introduction of a number of product innovations that range from flavored milks to other milk-based drinks. It is bringing 'new news' to the category and is adding excitement.

The key objective of the tuna category growth campaign will be to re-educate the U.S. consumer regarding the multitude of health and nutrition benefits provided by canned tuna. It is almost the perfect food and outperforms key competitors — skinless chicken and lean beef — in every meaningful nutritional category including calories, protein, total fat, saturated fat and cholesterol. Importantly, canned tuna is also high in Omega 3 fatty acids that are known to prevent heart disease and DHA that has been proven to stimulate brain development in fetuses and infants.

In addition to addressing the health and nutrition benefits of canned tuna, the category growth initiative will highlight the tremendous value of canned tuna. Compared to virtually every one of its 'canned protein' competitors, tuna sells at a significant discount. For example, compared to two common canned protein products, corned beef and chunk chicken, lightmeat tuna sells at discounts of 50% and 75%, respectively!

The three major brands are working through the U.S. Tuna Foundation on this critical initiative. While we have not yet reached consensus on a detailed program, we all seem to be in agreement that a category growth initiative is critical to the re-vitalization of canned tuna consumption in the United States.

Let's now move to a review of U.S. retail trends. Like most other developed markets, the U.S. retail trade is continuing to consolidate with the top 20 retailers now accounting for almost 70 percent of retail sales – up 36 percent since 1990. While this is not anywhere near the consolidation that has occurred in Europe, Canada or Australia, the trend is continuing to accelerate with negative ramifications for manufacturers as the retail trade becomes more and more powerful.

In addition to the retail trade, growth in Alternate Channels is having a major impact on U.S. food buying decisions. Alternate channels are comprised of three primary classes of trade – club stores (which are similar to European hyper-markets), drug stores and mass merchandisers. While these classes of trade are not necessarily focused on food products, they are carrying an increasing variety of high volume food items. Coupled with aggressive price points, the proportion of food that American households currently buy in Alternate Channels has risen to almost 45 percent in 2000 – up 30 percent from 1993 and continuing to grow at a rate that outpaces the traditional retail trade.

Alternate channels are also having a significant impact on how we sell canned tuna and they currently account for approximately 23 percent of total U.S. tuna sales. This brings us back to a comment made earlier in this document that 'retail' consumption in the U.S. has been down six of the last eight years. These retail consumption figures do not include Alternative Markets. Factoring in the growth of Alternate Market volume, total U.S. consumption is up slightly over the last ten years with all the growth being driven by these three 'alternate' trade channels.

Within the retail store, canned tuna remains a staple of the retail sales mix. Despite the lack of growth in the category, canned tuna continues to represent the number three moving item in all of U.S. grocery when measured on the basis of dollar sales per linear foot of shelf space. Only sugar and coffee sell at a higher rate.

In addition to the high sales rate, the retail trade recognizes that canned tuna buyers are 'desired' shoppers given their purchasing patterns in the retail store. Based on the market scan data which all of the retailers collect, they know that the average American shopper spends \$34 dollars when they go to the store. They also know that if they do not buy canned tuna they spend an average of \$31 dollars while if they buy canned tuna, they spend an average of \$68 dollars – more than double!

Based on this knowledge, canned tuna is a heavily merchandised item with a variety of merchandising activities including temporary on shelf price reductions, in-store features and displays and newspaper ads. As reported by AC Nielsen, more than 77 percent of all retail stores will feature tuna, almost 55 percent of tuna is sold with some type of merchandising and the average price discount when tuna is merchandised is 31 percent!

Supporting the merchandising decisions are ongoing improvements in in-store scan data along with a number of new Information Technology tools that are enabling manufacturers to more effectively sell products to the retail trade and ultimately to the consumer. While AC Nielsen and IRI continue to improve their services for providing market shares and category trends, these new tools provide information and analytical capabilities that are transforming the sales function from a relationship-based process to an information-based process. Rather than rely on the relationship between the buyer and seller we can now use information for a variety of purposes including:

- Customer and item profitability reviews
- Automated trade promotion analysis
- Efficient assortment decisions on what products should be on the shelf – and which shouldn't

- Shelf plan development based on the consumption patterns and demographics of various store locations
- Category management that demonstrates to the buyer which brands and products should be carried – and which should be de-listed

Information Technology is changing the rules of the game when it comes to how we sell canned tuna.

While the advances in information technology are exciting and are beginning to change the way sales are conducted, there are still several trade practices that have a significant impact on market place performance. Perhaps most impactful is the concept commonly referred to as 'slotting'. Slotting is a practice utilized by the U.S. retail trade to demand money from manufacturers to place a new product on the shelf. In essence it is the introductory fee you have to pay to put an item on the shelf.

While slotting fees vary by retailer, the cost to introduce one new item into national U.S. grocery distribution is about \$1.5 million. Slotting can be considered a 'shelf rental fee' for a new item and it buys that new item three to six months on the shelf. If the item does not reach a certain sales velocity during that period, it risks being de-listed and there is no reimbursement of the slotting fee. Furthermore, any slow moving items at retail are at risk of being de-listed at any time if a competitor comes in and offers the retail trade slotting money to obtain space for one or more of their new items.

This practice by the U.S. retail trade can help explain why there is so little innovation in the canned tuna category. To come out with a new range of four items nationally will cost six million dollars in up front slotting. If the product does not meet the expectations of the retailer, the slotting is a sunk cost. New products are a risky proposition – especially in the commodity canned tuna business that has very thin profit margins.

Let's now briefly review the competitive arena in the U.S. tuna market. During the course of this presentation we have referred regularly to the 'three brands' that comprise the majority of the U.S. canned tuna market. These three brands, StarKist (which is owned by H. J. Heinz), Bumble Bee (which is owned by ConAgra Foods), and Chicken of the Sea (which is owned by Thai Union) hold a combined share of the Total Tuna market in excess of 82%. StarKist continues to be the number one brand with a 40 percent share followed by Bumble Bee at 24 percent and Chicken of the Sea at 18 percent. Private label is a relatively minor component of the U.S. tuna market with market shares ranging between 10 and 15 percent.

Within tuna there are two primary sub-categories – lightmeat tuna (comprised of the species skipjack, yellowfin and bigeye) and albacore (or white) tuna.

In the lightmeat sub-category, StarKist has the number one share at 42 percent and both Bumble Bee and Chicken of the Sea hold 19 percent shares. Within the Total Tuna category, Lightmeat represents 71 percent of the total case volume and 52 percent of the dollar value.

Within albacore, Bumble Bee holds the number one market share at 39 percent followed by StarKist at 31 percent and Chicken of the Sea at 18 percent. This sub-category represents 29 percent of the case volume and 48 percent of the dollar value of the Total Tuna category.

As has been the case for the last ten years, there has continued to be dramatic changes within the three major U.S. tuna companies.

Over the last two years, StarKist has changed from taking a global view of their tuna business to one where the U.S. and European businesses are run separately. Within the U.S., StarKist has consolidated their organization with their parent company, H. J. Heinz and has moved from Newport, Kentucky to Heinz headquarters in Pittsburgh, Pennsylvania. They have also moved to divest themselves of a portion of their assets with the sale of their can-making operations to impress and the sale of their Pacific tuna fishing fleet to Tri-Marine. From a processing standpoint, StarKist has closed their Puerto Rico facility and today pro-

cesses fish in American Samoa and Ecuador while also using various co-packers. StarKist has led introduction of the pouch and appears to believe that this is the future of the industry.

Bumble Bee has also undergone several changes the most significant of which has been another new owner. After having been acquired out of bankruptcy by International Home Foods in 1997, the company was acquired by ConAgra Foods in August of 2000. ConAgra Foods is the largest food company in the United States with annual revenues in excess of U.S. \$27 billion.

Over the last three years Bumble Bee has diversified its seafood business from its historic strength in U.S. tuna and salmon. Today, Bumble Bee is the number one brand for specialty canned seafood and also has the number one brand for 'surimi' which is best known for its imitation crab meat. In addition, through the acquisition of the Clover Leaf brand, Bumble Bee holds the number one canned seafood position in Canada.

From a processing standpoint, Bumble Bee is moving to more reliance on tuna loins and has established new processing relationships in Fiji and Trinidad along with its existing operation in Ecuador. The company will continue to control most of its canning activities through its operations in Puerto Rico and California.

There has also been an ownership change at Chicken of the Sea which was acquired out of bankruptcy in 1997 by a partnership that included Thai Union with 50%, Tri-Marine with 25% and Ed Gann with 25%. In December of 2000, Thai Union acquired 100% ownership of the company.

Over the last year, Chicken of the Sea has taken steps to strengthen its overall business. Earlier in 2001, they entered into an agreement to manage sales and marketing for the Three Diamonds brand of seafood owned by Mitsubishi. They are also expanding their canned salmon and specialty canned seafood business and have acquired two specialty seafood companies over the last year. In addition to retail sales, Chicken of the Sea continues to maintain the number one position in the foodservice segment of the business.

From a processing standpoint, Chicken of the Sea produces most of its requirements at its facility in American Samoa. They recently announced the pending closure of their smaller facility in Terminal Island, California.

With their respective ownership changes, both Bumble Bee and Chicken of the Sea have significantly strengthened their financial position. Unlike the mid to late 1990's, when both companies were cash poor and living from debt payment to debt payment, they now rival StarKist in terms of their financial condition. However, the rules in the marketplace have not shown signs of change and all three companies still appear to be chasing market share through aggressive pricing practices. Unfortunately, with a declining or flat canned tuna category, share gains by one competitor mean a share loss by another and this is something that none of the three tuna brands appear willing to accept.

For the U.S. tuna industry to reverse the trends of stagnant consumption, increased commoditization and declining profits, the three powerful brands must begin making rational decisions regarding their approach to the market place.

As we summarize the present situation in the U.S. market, it does not appear to be an attractive industry.

Present Situation In the U.S. Canned Tuna Industry

- The retail trade is continuing to consolidate and is gaining more power over the manufacturers
- As the retail trade consolidates, buying decisions are being increasingly centralized and along with putting pressure on margins, the buyers are pushing to carry fewer brands
- While tuna remains an important grocery category to the retail trade, the lack of brand advertising and product innovation has turned the industry from a branded business into a commodity. As this occurs, private label is poised to take a stronger market position

- A further consequence of the lack of advertising and product innovation is that consumption of canned tuna is flat to declining and there has been minimal, if any, market growth in the last ten years
- Introduction of the tuna pouch has been the first real effort in more than ten years to provide product innovation and 'excitement' to the tuna category. However, the price point is prohibitive compared to canned tuna and alone, it is not the solution to the consumption problem
- The three major brands, while financially strong, are continuing to fight an un-winnable war for market share. With the ensuing poor profit margins, there is no money left to re-invest in the category to restore health – and growth – to the industry

While the canned tuna industry appears unattractive today, the situation can be reversed but improvement is predicated on the successful execution of five industry initiatives:

- Rational decision making regarding market share and profit margin expectations. This can allow us to regain control of our category from the trade and transition it back into a branded business. Importantly, this can provide the financial latitude to execute the next four initiatives
- Improved product quality so that as we bring consumers back to the tuna category, we meet their product expectations
- Product innovation to provide convenience and excitement to a stagnant category. We have to provide reasons for the consumer to come back to tuna
- Category growth initiatives to re-educate the consumer about the health and nutritional benefits of tuna. Canned tuna fits the U.S. consumers lifestyle and meets their need for a healthy and convenient food – we have allowed them to forget that
- Consumer marketing that, when combined with category growth initiatives, will not only grow consumption, but will also provide a healthy competitive environment – an environment that forces all of the brands to continue to improve and innovate as they strive to keep pace with one another

The power to make this happen is in the hands of the three major U.S. tuna brands – StarKist, Bumble Bee and Chicken of the Sea. The question is whether we can overcome the bad habits we developed in the 1990's to re-establish a growing and profitable tuna industry as we enter the 21st century.

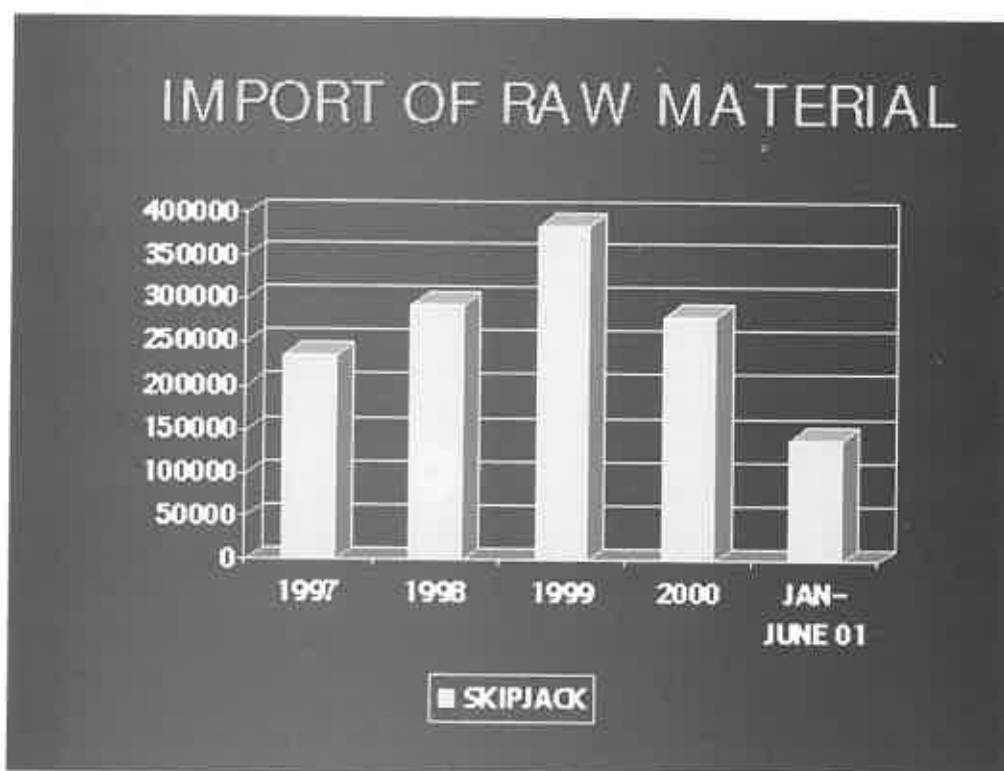
THE TUNA IN THE WORLDWIDE MARKET. PRESENT SITUATION AND FUTURE PERSPECTIVES TO TUNA MARKET OUTSIDE THE EUROPEAN UNION

MR. DATO TAN BOON PIN,

CHAIRMAN TROPICAL CANNING PUBLIC CO. LTD. THAILANDIA

INTRODUCTION

With its humble beginning in the early 1970's where local tuna were the only resource available to the tuna industry supply to mainly the European and Scandinavian market. Thailand soon became a major canned tuna exporter after the North America started to import canned tuna from Thailand. Due to the increasing demand for raw material, which local resources are not able to meet, tuna industry started to import frozen tuna to fill their need.



Over 80 percent of raw materials used in the Thai canning industry are imported mostly from Taiwan and Japan. The largest amount of frozen tuna imported about 500 thousand tons had been recorded as well as the largest canned tuna export of 272,800 tones worth nearly usd650 million in 1991.

TOTAL CANNED TUNA EXPORT (METRIC TON)

COUNTRIES	QUANTITY (TONS)							
	1994	1995	1996	1997	1998	1999	2000	2001(JAN-MAY)
TOTAL	268,974	221,245	188,464	203,763	227,319	259,052	244,696	102,982
USA	74,203	59,883	42,969	52,458	67,042	88,892	62,616	NA
EU	85,016	63,465	46,193	41,231	39,492	38,950	31,486	NA
JAPAN	28,557	13,794	10,821	10,423	8,203	12,093	14,115	NA
CANADA	16,589	17,678	16,601	16,656	16,345	24,607	23,718	NA
MIDDLE EAST	18,294	20,436	16,271	20,275	26,752	26,262	23,445	NA
AUSTRALIA	9,465	10,413	11,176	10,684	10,185	13,220	21,631	NA
ASIAN	2,342	1,745	2,976	2,846	2,841	2,499	2,992	NA
OTHERS	33,403	40,341	36,457	46,195	56,513	47,299	64,692	NA

TOTAL CANNED TUNA EXPORT (MILLION BAHT)

COUNTRIES	VALUE (MILLION BAHT)							
	1994	1995	1996	1997	1998	1999	2000	2001(JAN-MAY)
TOTAL	15,620	13,623	12,385	17,339	25,173	21,886	18,701	9,382
USA	4,492	3,269	2,824	4,621	7,532	7,125	5,046	NA
EU	4,912	3,569	2,788	3,331	4,270	3,133	2,224	NA
JAPAN	1,154	1,142	906	1,081	1,140	1,367	1,503	NA
CANADA	1,110	1,177	1,263	1,917	2,244	2,337	2,090	NA
MIDDLE EAST	1,232	1,326	1,281	1,721	3,013	2,424	1,825	NA
AUSTRALIA	620	710	787	981	1,333	1,721	1,784	NA
ASIAN	137	111	184	224	308	212	241	NA
OTHERS	1,963	2,335	2,343	3,493	5,308	3,567	3,988	NA

In the global tuna trade, Thailand has dominated the market as the top supplier of **canned tuna** since 1985. It has been able to maintain its position as world's top producer of canned tuna mainly due to the industry's strives to improve the quality of canned tuna by introducing new production technology, upgrading of facility, improvement of quality control as well as increasing productivity, which allow Thailand to consistently supply high quality and low cost canned tuna to the world market. Although Thailand has been on top of the list as the world's top producer of canned tuna, it's standing as top supplier is under great pressure from it's neighbors as well as Central America and canneries situated in Africa, where they enjoy a duty free entry into the USA and EU market. Base on available data, the

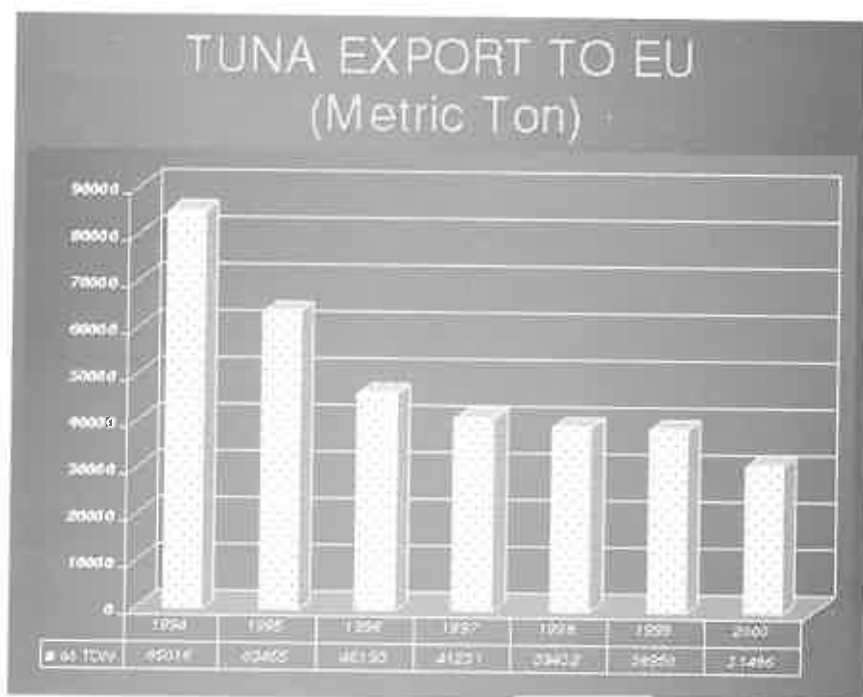
total export value and quantities in MT to major tuna importing countries i.e.USA, EU and Japan all seen decline in quantity imported from Thailand. While export to those countries has declined over the years, markets like Canada, Middle East, Australia and others all seen growth since 1994. The biggest growth came from Australia where the export quantity has grown from 9,465 metric ton in 1994 to 21,631 metric tons in 2000. Apart from that Thai canned tuna also seen growth outside traditional market, mainly in countries classified under "others". The quantity exported to "others" market grew from 33,408 metric ton in 1994 to 64,692 metric ton in 2000. The growth in these markets is closely related to the changing consumption pattern of consumers. As more and more people turn to pay attention to their health, most reduce intake of meat and turn to fish. And because of product quality and price, canned tuna is the best options those consumers. As a result it is expected that the growth in this sector will continue at a very healthy rate.

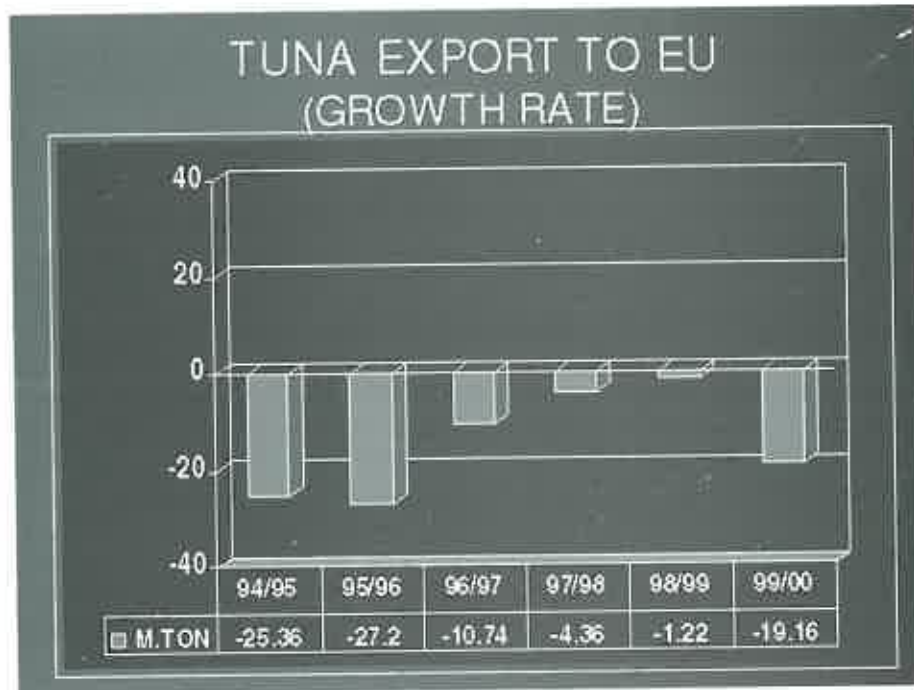
From 1994 to 2000, Thai Tuna Export has seen its fair share of ups and downs of tuna trade. In 1994, Thailand's export volume stood at a total of 268,974 MT. Unfortunately, due to strong competition from within the region, reducing consumption in major tuna importing countries and among other factors, Thai canned tuna industry see its canned tuna export in MT dropped to 221,245 MT in 1995 and further declined to 188,464 MT in 1996, a 30% drop in export volume when compare to 1994. Instead of conceding defeat, Thai tuna industry staged a come back in 1997 with the help from unpegging of baht to increasing productive among tuna packers. With the export volume of 259,052 MT or 31.59 million standard cases, 1999 was to be ranked the third most productive year in the twenty-year history of Thailand tuna industry.

TRADITIONAL MARKETS

EUROPEAN UNION

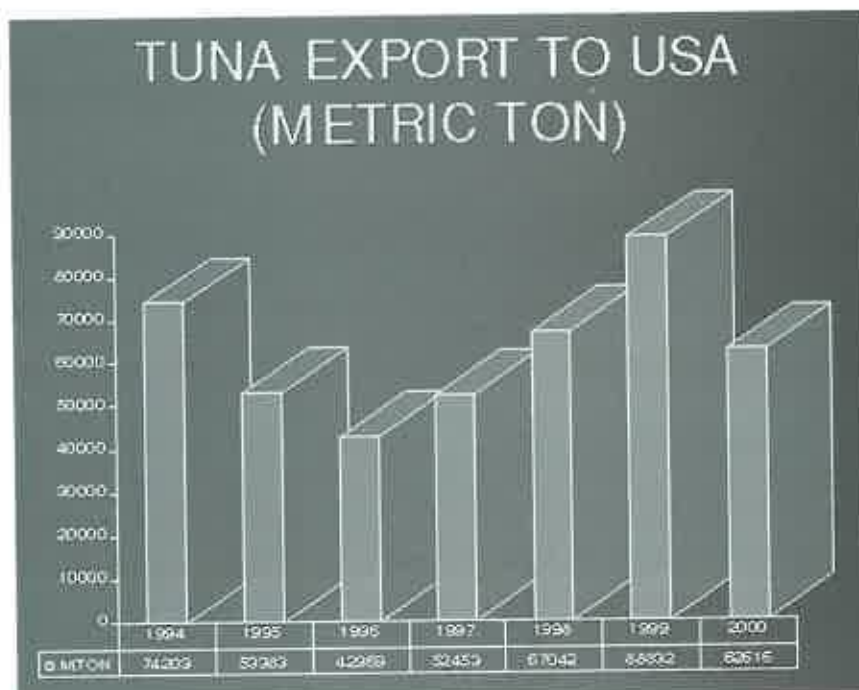
In 1994, the total value and quantities exported to EU stood at 4,912 million baht or USD196 million (rate of 25 baht to a dollar) and while quantity was 85,016 MT. Since then, the export value and quantities of Thai canned tuna declined to 2,224 million baht or USD55.6 million (rate of 40 baht to a dollar), while quantity dropped to 31,486 MT in 2000 from the peak of 85,016 MT in 1994.

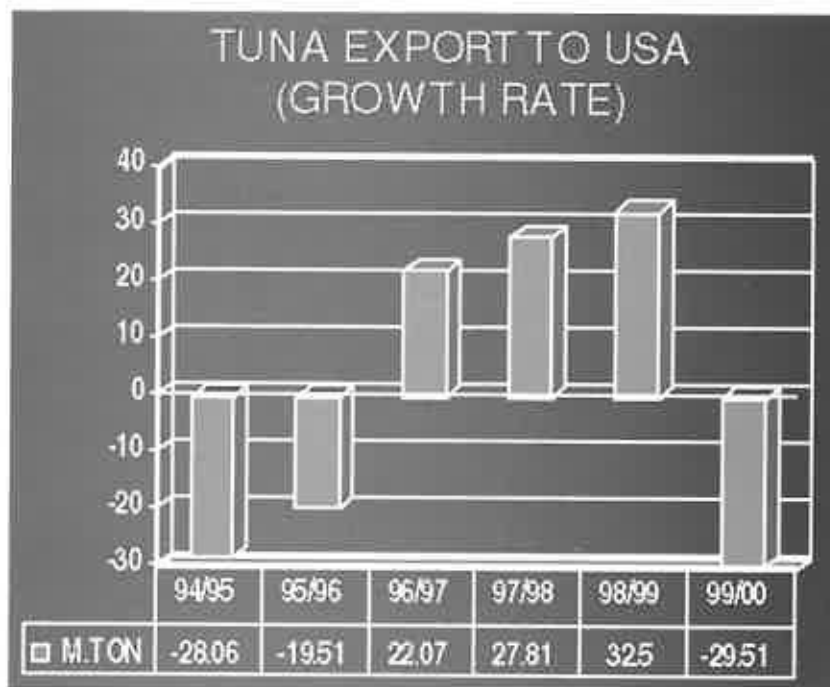




USA

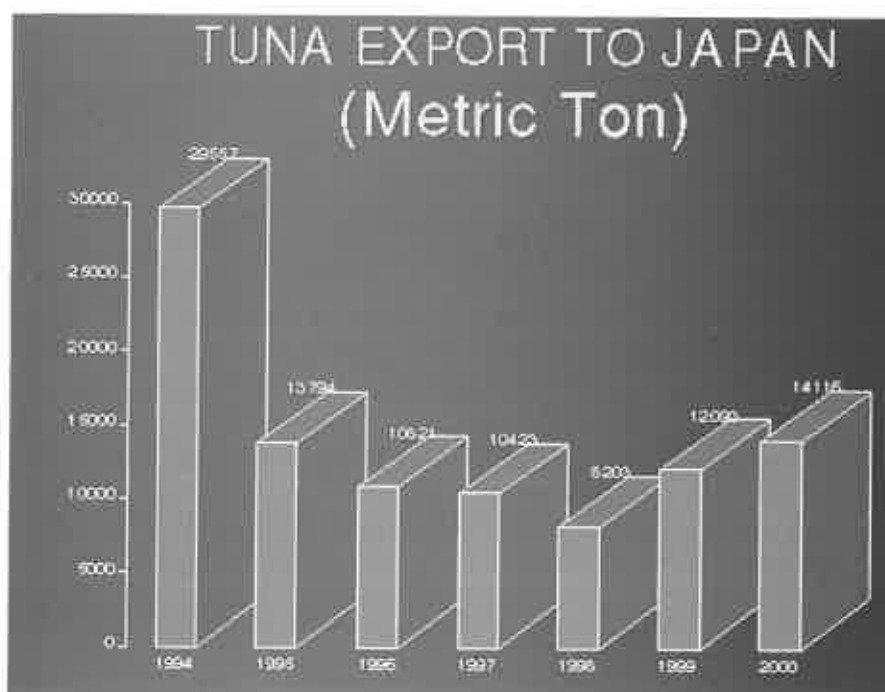
While export value and quantity to EU experiencing downward trend during 1994 to 2000, export to USA also dropped during the same period. Export to USA was at 4,492 billion baht or USD179 million (base on 25 baht to a dollar) and 74,203 MT in 1994. However, it's export in quantity dropped dramatically during 94 and 95 before recovering to 88,832 MT in 1999 but had to settle at 62,616 MT in 2000.

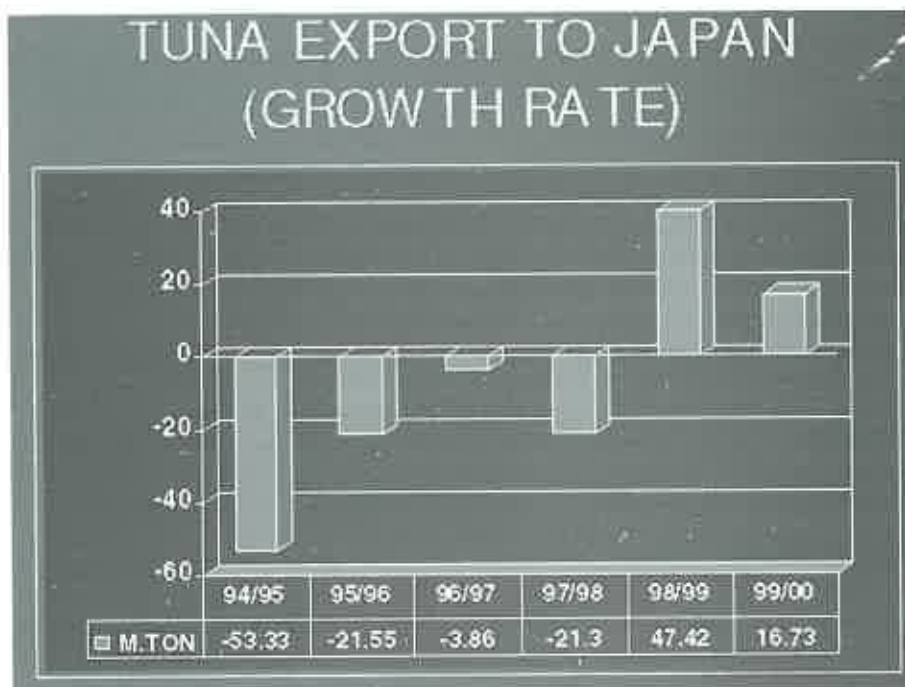




JAPAN

Japan, the last of the three "Traditional Market" experienced decrease in tuna import from Thailand during 1994 to 1998 where the quantity imported dropped from 29,557 MT in 1994 to 8,206 MT in 1998 before it recovered to 14,116 MT in year 2000.





FUTURE PERSPECTIVES

While Thailand will continue to be a major supplier of canned tuna to the "Traditional Market", it is without doubt that its competitiveness is being undermined by some of the following issues one way or the other:

1. Shortage of local catch
2. Reliance on Imported Tuna
3. Falling canned tuna consumption in the major importing countries
4. Strict quality control standard
5. Unjustified trade barrier and other forms of protectionism

Even though the "Non Traditional Market" shows signs of increasing consumption, tuna processors still need the volume from the "Traditional Market" to have scale of economy. Therefore, Thai tuna industry along with the government should continuously work closely together with regulatory agencies in importing countries, especially the European Unions, on progressive reduction of import tariffs currently imposed on canned tuna from mainly Asian countries.

While the industry continues to struggle for a fair share of the total tuna market overseas, processors should work together in promoting the consumption of canned tuna in its own market and eventually reaching out to the neighboring countries like Malaysia, Singapore, Hong Kong, Taiwan and China. In 1996, Thailand processors started to promote homegrown label for the domestic market. The domestic market, which is estimated at 500,000 cases with a value of 490 million baht (Chart), offers variety of flavor to give consumers the choice of having it in curry, chili, sweet and sour sauce, mayonnaise with crackers, oil, brine and Spring water. All these are employed by producers to build awareness among consumers that canned tuna not only come in brine and oil where most are not able to acquire the taste for it.

On the other hand, canned tuna is gaining popularity mainly due to the convenience factor as well as nutritional value. The usage of canned tuna at the institutional level in Southeast Asia and the Far East is gaining momentum as more and more snack bars and café mushroomed in and around the urban areas. On the retail level, canned tuna also enjoy some degree of acceptance especially among the younger generation who has had a change to travel oversea and therefore exposed to tuna in one form or the other.

Lastly, to market canned tuna to Asian consumers will be an uphill climb as most still have a strong preference for fresh or frozen fish. Nonetheless, the growth in usage of canned tuna both domestically in Thailand and within the Asian region point to a promising future for Thai tuna industry if it can promote the consumption of tuna successfully within the Asian region.

Thank you.

LA ACTIVIDAD ATUNERA MEXICANA

D. ANTONIO SUÁREZ GUTIÉRREZ

PRESIDENTE DE GRUPOMAR

La flota y la planta industrial atuneras mexicanas comenzaron su incipiente desarrollo en los primeros años de la década de 1960, en 1964 la captura fue de 1.300 ton. solamente.

A pesar de las grandes dificultades que ha tenido que sortear, tanto internas como externas, sin embargo, actualmente la captura es de 140.000 ton/año, se producen 11.5 millones de cajas, se consumen 20.000 ton en otras presentaciones y se exportan de 15.000 a 20.000 ton de entero congelado.

El más importante desarrollo atunero del país ha tenido lugar en el período 1985-2000; mismo que, a diferencia de lo que ocurre en muchos otros países, no ha contado con ningún apoyo económico ni financiero de parte del Gobierno sino que ha sido prácticamente un logro exclusivo del sector empresarial.

INDUSTRIA ATUNERA MEXICANA 1996-2000

	1996	1997	1998	1999	2000
Captura (ton)	153.000	168.000	138.000	147.000	140.000
Exportación y otros usos (ton)	38.000	50.000	34.000	37.000	18.000
Enlatado doméstico (ton)	115.000	118.000	104.000	110.000	122.000
Millones de cajas	10.7	10.5	10.0	10.5	11.5

Somos así el 9º país en capturas, 8º en producción de atún enlatado y nuestro mercado es el 5º más grande del mundo.

PRINCIPALES PAÍSES PRODUCTORES DE ATÚN 1996-2000 CAPTURA ANUAL, MILES DE TONELADAS

	1996	2000	TCAC*
JAPÓN	630	700	2.7%
TAIWAN	365	490	7.6%
INDONESIA	260	370	9.2%
ESPAÑA	280	270	-0.9%
EE.UU.	220	220	0.0%
FILIPINAS	170	190	2.8%
FRANCIA	60	170	29.7%
ECUADOR	60	170	29.7%
MÉXICO	153	140	0.0%
VENEZUELA	75	90	4.7%
OTROS	1.010	1.350	4.1%
Total	3.285	3.900	4.4%

* TCAC: tasa de crecimiento anual compuesta

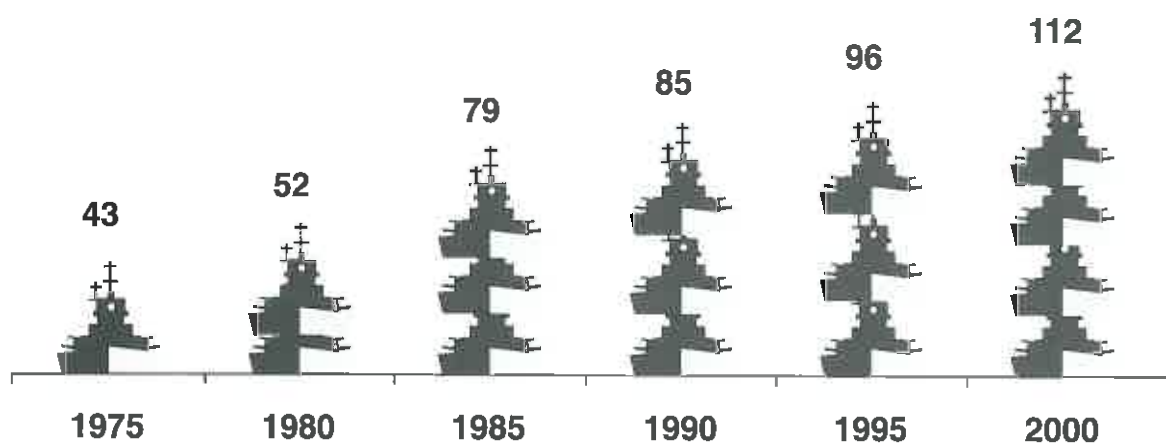
Nuestra pesquería es 95% de aleta amarilla y 5% de barrilete y otras especies y se captura durante todo el año. Nuestra producción de atún enlatado está hoy dedicada prácticamente 100% al mercado doméstico, dados los múltiples bloqueos que nos han sido impuestos.

Los importantes logros alcanzados, en condiciones tan adversas, son un indicativo elocuente del potencial que aún tenemos por ejercer. Estamos convencidos que dicho potencial habrá de materializarse pronto y que en la década que estamos iniciando, veremos una cada vez más fuerte industria, un mercado doméstico en continuo crecimiento y una incipiente presencia del atún mexicano en todos los mercados internacionales.

Antes de tener la oportunidad de contestar algunas preguntas de los asistentes, me gustaría comentar sobre la influencia que ha tenido México, como país atunero, en los grandes cambios que han ido transformando a esta actividad en el mundo, para darle la configuración que actualmente tiene.

En la década de los años 70 México emprendió un esfuerzo de expansión de su actividad atunera. Hacia 1976 la flota ya tenía una capacidad de acarreo de casi 13.000 ton. (30 embarcaciones) con adquisiciones de embarcaciones provenientes de España, Polonia y EUA. Apoyado dicho esfuerzo en la adopción del régimen de la Zona Económica exclusiva, para 1982 la flota constaba de 52 barcos y 64.000 ton. de capacidad de procesamiento industrial.

EVOLUCIÓN DE LA FLOTA ATUNERA MEXICANA 1975-2000 NÚMERO DE EMBARCACIONES REGISTRADAS



NOTA: El número de embarcaciones en operación normalmente es menor

El sistema de cuotas de pesca con el que se operaba en la CIAT favorecía que la flota americana capturara un gran porcentaje de la misma, en una temporada que duraba pocos meses del año, y México, teniendo la mayor ZEE del Océano Pacífico Oriental pescaba sólo pequeños volúmenes.

En defensa de su soberanía México tuvo que salir de la CIAT, la flota Americana tuvo que dejar de pescar en la ZEE mexicana y se estableció el primer embargo atunero, en 1980, sobre México, por parte de los EUA.

Es decir por razones de políticas de Estado de ambos países, sus industrias atuneras se vieron forzadas a tomar decisiones diferentes a las que desde el punto de vista empresarial y de negocios hubiera sido recomendable. En vez de integrarse ambas actividades y hacerse así más fuertes conjuntamente, la flota americana se vendió en parte a países Latinoamericanos (Venezuela, Panamá, México, Colombia y Ecuador) y el resto se relocizó a operar en el Océano Pacífico Sudoccidental.

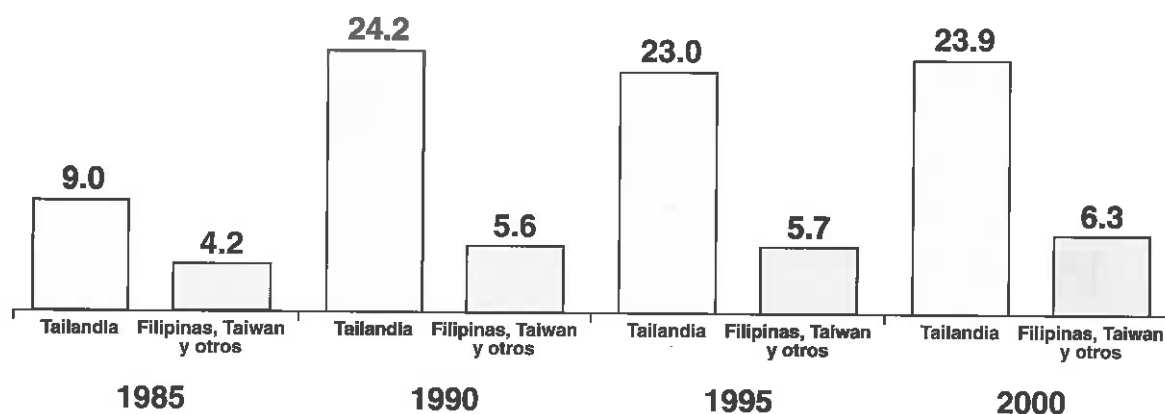
Se desarrolló así en el Océano Pacífico Sudoccidental una gran pesquería de barrilete de altos rendimientos, la cual no solo mantuvo la flota americana en operación, sino que dio origen al desarrollo de las flotas cerqueras japonesas, coreana, taiwanesa, filipina e indonesia.

EVOLUCIÓN DE CAPTURAS POR ZONA DE PESCA 1980-2000
MILES DE TONELADAS

	1980	1985	1990	1995	2000	2000 VS 1980
Océano Pacífico Sudoccidental	562	615	1.131	1.346	1.531	172%
Océano Índico	190	318	493	664	696	266%
Océano Pacífico Oriental (Opo)	395	549	567	487	599	52%
Océano Pacífico Norte	243	215	257	202	305	26%
Océano Atlántico	394	338	392	415	364	-8%

La industria enlatadora americana se relocizó a Puerto Rico y a Samoa Americana principalmente y se propició el gran desarrollo de ésta en Tailandia.

PRODUCCIÓN DE ATÚN ENLATADO EN EL SUDESTE ASIÁTICO
1985-2000, MILLONES DE CAJAS

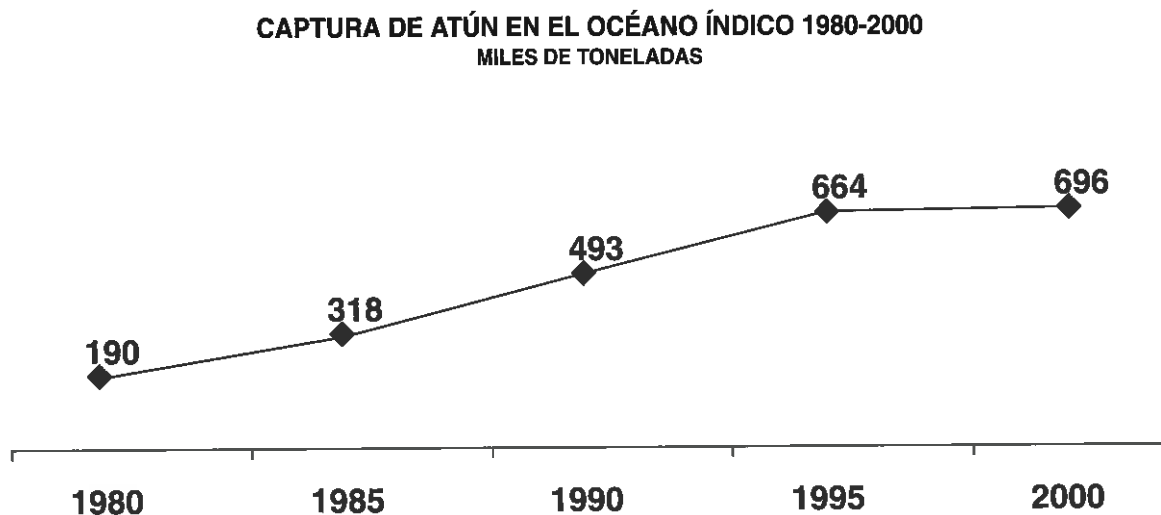


También la flota Latinoamericana creció de tamaño rápidamente, solo que con base en barcos de bastante edad.

Ante el embargo por parte de los EUA. México, se vio precisado a desarrollar nuevos mercados donde colocar su producción de atún entero congelado, llegando a exportar 90.000 ton de atún aleta amarilla a Europa (Italia, Francia, España) y a Japón en 1989.

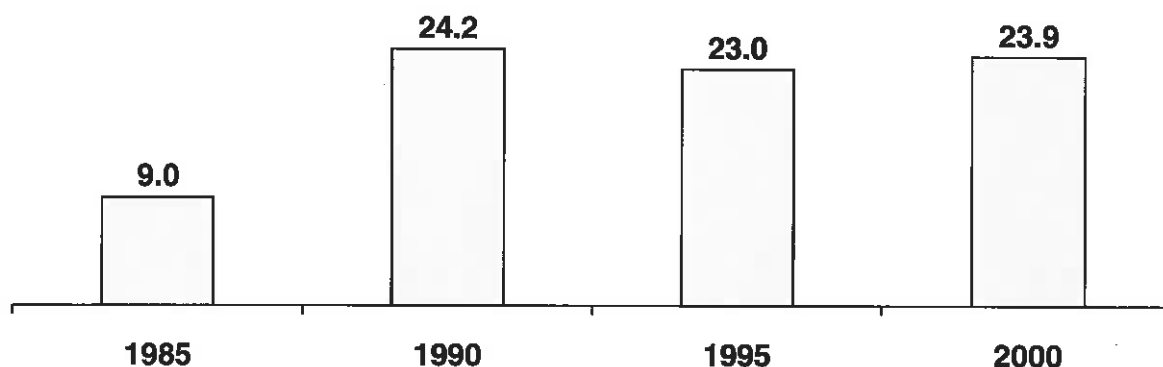


Mientras se desarrollaba la nueva pesquería en el Pacífico Sudoccidental, apareció "El Niño" de 1982, que duró hasta 1984. Al mismo tiempo las capturas disminuyeron fuertemente en el Atlántico, ocasionando una crisis de capturas y precios, por lo que la flota europea (España y Francia) tuvieron que desarrollar, a partir de 1984, una nueva pesquería de atún en el Océano Índico, con base en las Islas Seychelles. Fue esta crisis la que propició la expansión de mercado para el atún entero congelado mexicano, de 1985 a 1992.



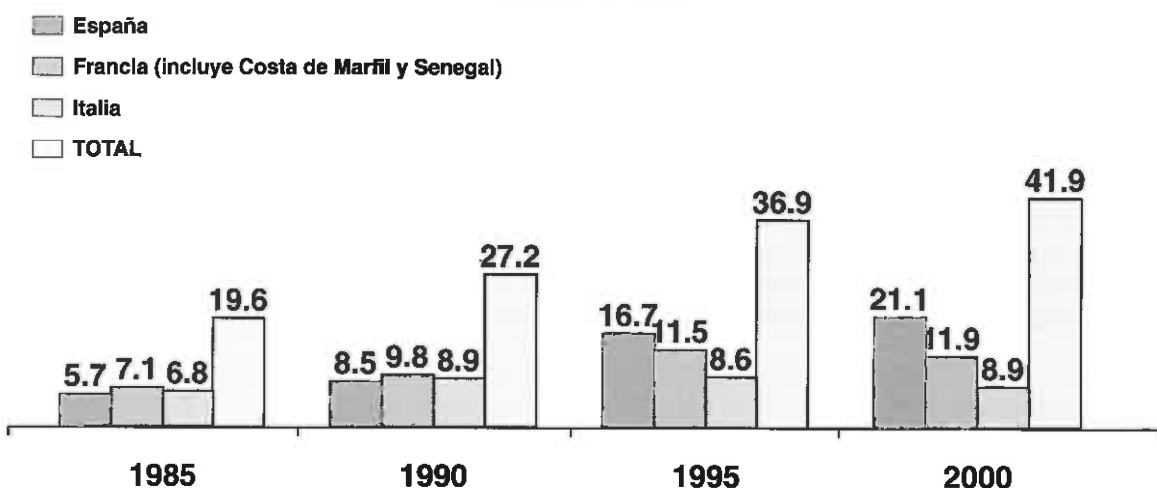
El desarrollo de esta nueva pesquería en el Océano Índico de bajo rendimiento en atún aleta amarilla (40%) que era el producto objetivo para surtir las necesidades de Francia, Italia y España, puso a disposición de Tailandia una gran oferta adicional de barrilete, de bajo precio, que con el capturado en el Pacífico Sudoccidental dio origen a la gran expansión y modernización de la planta enlatadora tailandesa; y a la conquista por parte de ésta del mercado de los EUA con atún enlatado de muy bajo precio y posteriormente la conquista de los mercados emergentes europeos (Alemania, Inglaterra, Países Bajos, etc.)

TAILANDIA: EXPORTACIONES DE ATÚN ENLATADO MILLONES DE CAJAS



Parecería que tanto Europa como México dejaron pasar la oportunidad que tuvieron para integrarse: México, con atún de alta calidad disponible todo el año, mano de obra barata, personal de buenas habilidades industriales y una adecuada infraestructura portuaria e industrial y de comunicaciones; y Europa con un mercado en crecimiento para productos de alta calidad.

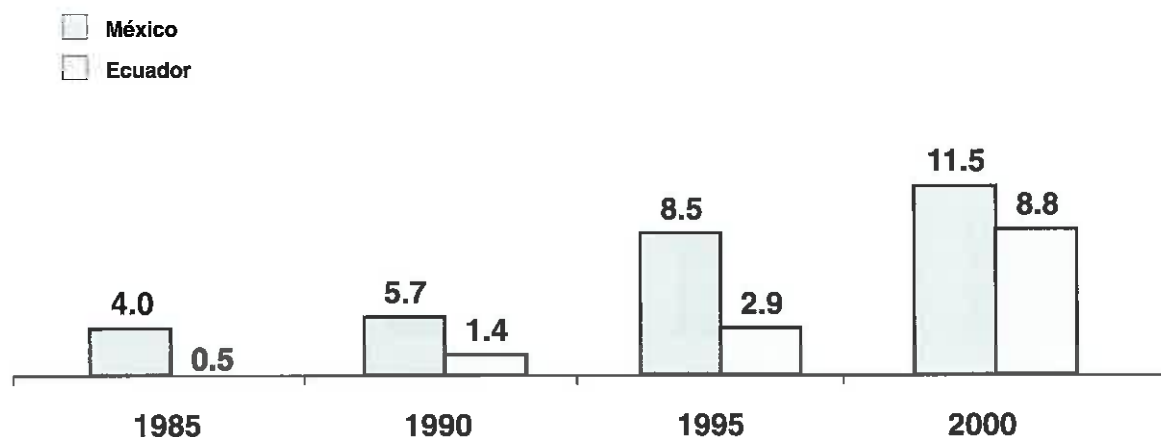
PRODUCCIÓN DE ATÚN ENLATADO EN LA UNIÓN EUROPEA 1985-2000 MILLONES DE CAJAS



Europa volteó hacia países Latinoamericanos que tenían flotas pequeñas y escasa infraestructura industrial para inducirlos a reconvertir plantas pesqueras en plantas para producir lomos de atún precocidos, aprovechando un programa que eliminaba los aranceles para la importación de productos agropecuarios y pesqueros. Así dichos lomos de atún comenzaron a llegar a Europa en condiciones ventajosas.

Tomó varios años hacer funcionar estos proyectos en Venezuela y Colombia originalmente, y aunque actualmente hay una producción creciente en el área de lomos y productos terminados para Europa, principalmente de Ecuador y Costa Rica, el proyecto hubiese resultado menos costoso, más eficiente, más pronto, de haberse llevado a cabo con México.

PRODUCCIÓN DE ATÚN ENLATADO EN LATINOAMÉRICA 1985-2000 MILLONES DE CAJAS



Adicionalmente al importante desarrollo atunero del Ecuador, más recientemente las grandes empresas armadoras y conserveras españolas han emprendido importantes proyectos de coinversión en Guatemala y El Salvador, tanto para capturar atún en el OPO, como para eventualmente producir lomos y atún enlatado.

Con la participación de la industria atunera mexicana, la capacidad adicional de producción que se persigue con estos proyectos, podría haber estado ya disponible.

Además de los factores estratégicos muy positivos ya comentados en cuanto a capturas e industrialización, en México existen marcas de productos atuneros tan antiguos como de hace 70 años, empresas productoras de conservas muy diversificadas en cuanto a su línea de productos, sistemas de distribución modernos y eficientes, una población cercana a los 100 millones de habitantes que crece y una economía cuyos fundamentos y posibilidades de desarrollo son cada vez más sólidos.

Los aranceles al atún enlatado para exportaciones a los EUA y Canadá dentro del TLC de América del Norte serán eliminados totalmente en el año 2008 y nuestra vecindad con dicho país, que es el consumidor más importante de atún enlatado en el mundo, ofrece ya ventajas económicas considerables, contra otros producidos en zonas más distantes y que son luego importados a los EUA. Estos cambios estratégicos representan nuevas oportunidades que la industria atunera mexicana no puede dejar de aprovechar.

El TLC con la Unión Europea también debería ser un positivo instrumento para potencializar beneficios, como los que pueden encontrarse al integrar las potencialidades de la industria mexicana y el mercado europeo, que crece fuertemente y que cuenta con una importante diferenciación de productos que determinan nichos de mercado de diferentes calidades y precios.

Parecería muy conveniente que las empresas atuneras de la Unión Europea consideraran en sus planes futuros la indiscutible existencia y el amplio potencial de la industria atunera mexicana.

INDIAN OCEAN TUNA INDUSTRY

MR. JOEL NAGEON DE LESTANG

DIRECTOR FISHERIES RESOURCE MANAGEMENT

SEYCHELLES FISHING AUTHORITY

1. INTRODUCTION

In this presentation more emphasis will be placed on the situation in the Western Indian Ocean and to the industrial tuna fishery in view of the fact that the tuna catches in the Western Indian Ocean are more important. In 1997 for example 73% of the total catch of 1,167,717 MT of tuna and tuna-like species was caught in the Western Indian Ocean and the purse seine catch represented 32% or 372,464 MT.

2. THE PURSE SEINE FISHERY

2.1 Total Catch

Most of the purse seiners operate in the Western Indian Ocean with the catch in 1997 of 301,489 MT or (81%) of the total purse seine catch. A record catch of 331,000 MT was made in the year 2000 in the Western Indian Ocean. Three purse seiners, all Spanish, caught more than 10,000 MT each.

Seychelles because of its geographical position in the middle of the Western Indian Ocean and with its rich tuna fishing grounds is the country in the region which issues the most foreign fishing licences. For this reason, it is able to obtain early a fairly accurate picture of the purse seine catch. However, it is much more difficult with longliners as the duration of the licences are much shorter and the catch returns are not as good as those of purse seiners.

The total catch of purse seiners under licence from Seychelles is shown in Figure 1.

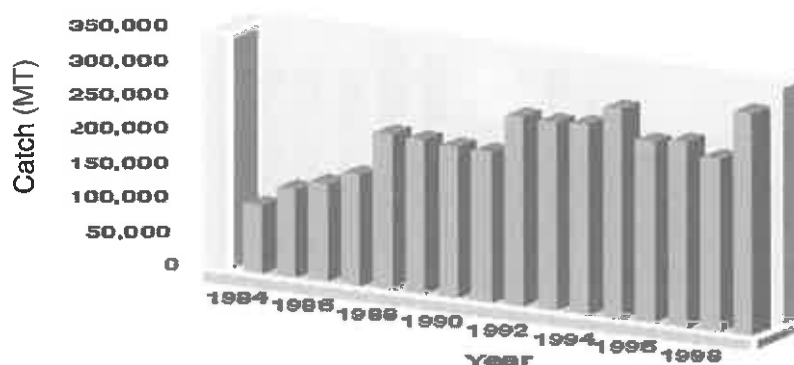


Figure 1. Total catch by purse siners licensed in Seychelles (1984 – 1999)

Source: SFA database

The catch has increased steadily since 1984 to level in 1992 at around 270,000 MT. It peaked at 307,000 MT in 1995 and reached a record of 331,000 MT in 2000 following almost a similar catch in 1999 with 329,000 MT. Only small amounts of fish by these purse seiners come from the Eastern Indian Ocean although in 1998 several purse seiners moved very far east as far as Phuket in Thailand. The catch in 1999 was particularly good in the second half of the year in the region north of Seychelles and in the Somali Basin.

2.2 Composition of the fleet

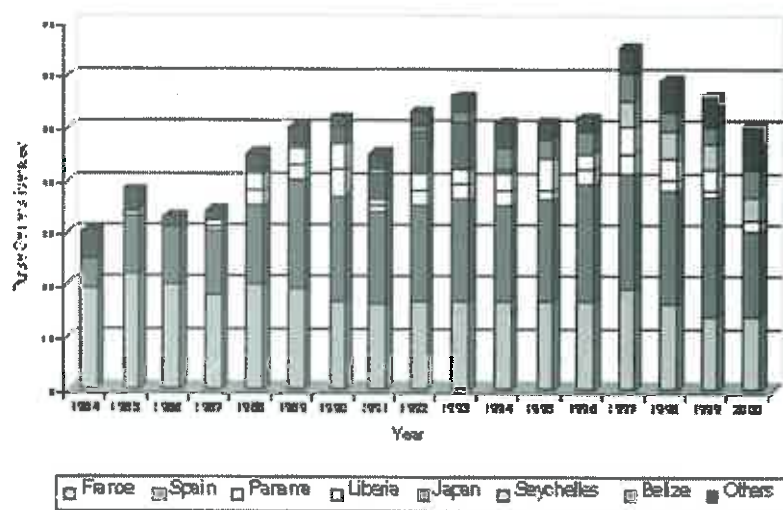
The majority of the fleet operates from the Seychelles and most of the Seychelles licensed purse seiners land and tranship in Port Victoria. The table below shows the average number of purse seine fishing licences issued by the Seychelles Government for fishing in Seychelles waters since 1984 when purse seine fishing started on a commercial scale.

Table 1. Average number of purse seiners licensed by country of registration per year (1984-1999)

Country	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
France	22	20	18	20	19	17	16	17	17	17	17	17	19	16	14	14
Spain	11	11	12	15	21	20	18	18	19	18	19	22	22	22	25	16
Ivory Coast	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mauritius	1	1	2	3	3	2	3	3	3	3	3	3	2	1	1	1
Panama	1	0	1	3	3	3	1	3	3	3	2	3	4	2	1	2
U.K.	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Liberia	0	0	1	3	3	3	1	3	3	3	6	3	3	4	4	0
Japan	0	0	0	1	1	3	3	8	9	1	0	0	0	0	0	0
Seychelles	0	0	0	0	0	0	1	1	0	0	0	0	3	3	3	3
Iran	0	0	0	0	0	0	0	0	0	2	0	0	0	0	1	1
Belize	0	0	0	0	0	0	0	0	2	4	4	4	3	4	3	3
Italy	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
Antigua	0	0	0	0	0	0	0	0	0	0	0	0	2	4	3	3
Average	30	30	34	45	50	52	45	53	50	51	51	52	65	59	56	50

Source :SFA database

Figure 2. Nationality of purse seiners licensed in Seychelles (1984 – 2000)



Source: SFA database

From the beginning the fishery has been dominated by French and Spanish purse seiners as is clearly shown in Figure 2. The most important new arrival in recent years has been Seychelles registered vessels though this is somewhat deceptive as four of the five Seychelles vessels were previously fishing in the region under the Liberian flag and only one, that of SAUPIQUET is a 107 metre new super seiner. These vessels would normally have flown the French flag were it not for EU vessel allocation criterias. In April 2000, one of these Seychelles registered vessels changed its flag and left for the Pacific.

The vast majority of purse seiners licensed in Seychelles have a one-year licence except for the case of the Panamanian registered vessels (ex-USSR vessels) based in Singapore that periodically obtain licences for a few months at a time. It is likely that for the rest of the time these vessels fish mostly in international waters. The total number of purse seiners under licence dropped from 54 at the end of January 1999 to 46 at the end of April 2000.

It should also be pointed out that not all licensed vessels are necessarily active and present in the region as is shown in Figure 3.

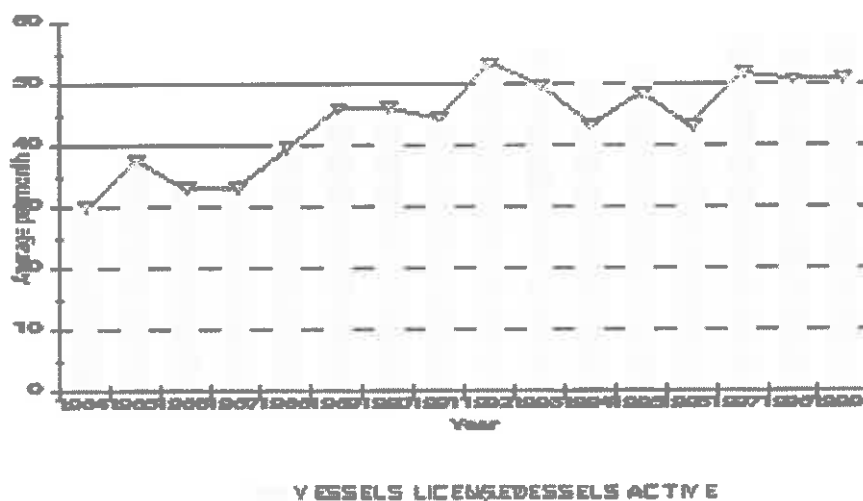


Figure 3. Vessel activity of purse seiners (1984 – 1999)

Source: SFA database

It is sometimes the case that some vessels under the fishing agreement between Seychelles and the European Union (EU) obtain a licence but do not come to the Indian Ocean.

Since the past five years there has been a trend whereby there has been a movement of some Spanish and Spanish owned vessels from the Indian Ocean to the Pacific and Atlantic Oceans. Some vessels from the Atlantic have also moved to the Indian Ocean. The trend has been for the older and smaller boats to go to the Atlantic Ocean while the bigger and newer units that left the Indian Ocean have moved to the Pacific Ocean. This trend can be mainly explained by the poor catches in the Atlantic Ocean for the last years and the excellent catches made by the boats in the Pacific Ocean.

2.3 Transshipment and Landings

The main transshipment and landing port for tuna purse seiners is by far Port Victoria in the Seychelles with over 150,000 MT a year and reaching a peak of 269,672 MT in 2000. Proximity to the fishing grounds is most likely the main consideration for this. Good port facilities and services and the

presence of a canning factory are also important factors. Table 2 and Figure 4 show the major place occupied by Port Victoria in the landing and transhipment of tuna purse seiners under licence from Seychelles in the region.

Table 2 Transhipment and landings of tuna (MT) from purse seiners holding Seychelles fishing licences (1993 – 2000)

COUNTRY	1993	1994	1995	1996	1997	1998	1999	2000
Seychelles	188957	171043	185489	163657	200279	151592	257447	269673
Madagascar	47119	75053	56799	45635	37871	43879	40010	38239
France	-	-	-	-	-	-	-	-
Kenya	11557	7407	22140	11444	16988	11186	8139	14781
Spain	-	-	1251	393	-	-	-	-
Iran	-	-	-	3094	735	-	815	4721
New Zealand	-	-	-	110	-	-	-	-
Thailand	686	-	-	-	-	22140	3538	937
Singapore	675	374	-	-	-	1237	-	-
Mayotte	-	-	-	-	-	-	2231	382
Azores	-	-	-	-	-	-	852	-
Ivory Coast	-	-	-	-	-	-	258	-
Maldives	-	-	-	-	-	-	-	-
Other	-	-	110	-	-	1447	-	-

Source: SFA database

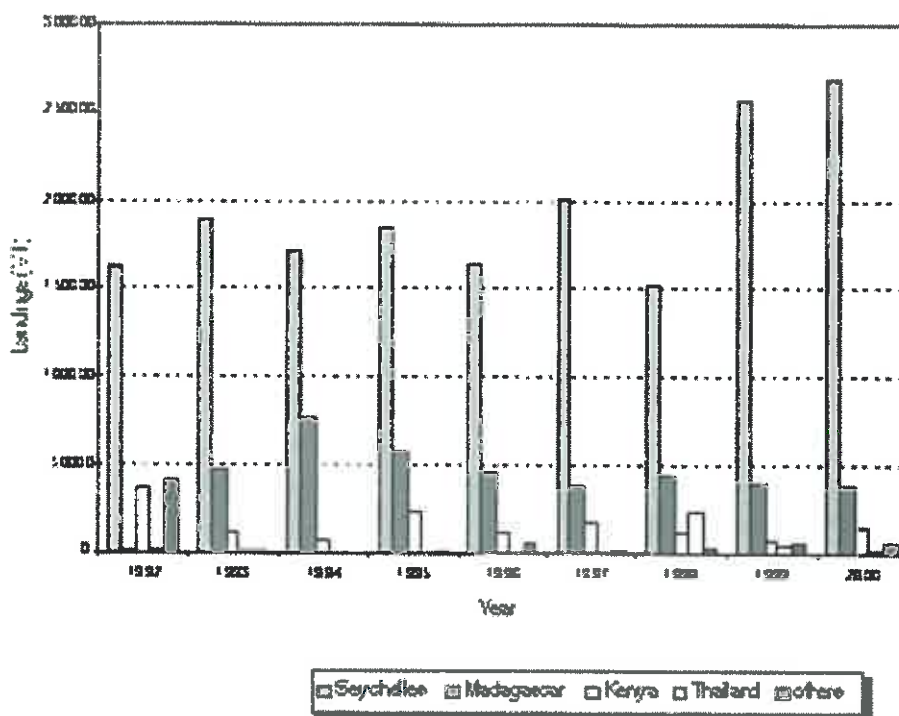


Figure 4. Transshipment and landings of tuna (MT)

Source: SFA database

Antsiranana in Madagascar has for many years been the second most important port of the region especially during the months of March to May, when fishing operations move to the Mozambique Channel. The Port of Mombassa is used seasonally by some Spanish vessels. Attempts have been made from time to time to use some other ports such as Gan in the Maldives when fishing was very good in the Chagos and more recently in Mayotte but these have not been particularly successful.

Transshipment and landing activities were important in Phuket especially in 1998 as purse seiners were operating very far east from the Seychelles.

3. LONGLINING

The longline catch was 250,309 MT in 1997 and fairly evenly shared with 136,790 MT in the Western Indian Ocean and 135,154 MT in the Eastern Indian Ocean. This fishery involves a much greater number of vessels and whereas the purse seining fleet is dominated by French and Spanish interests, the longline fleet, as shown in Table 3, is mainly Taiwanese, Japanese, Indonesian and Korean. This is partly reflected in the number of vessels which purchased licences from Seychelles.

Table 3. Individual longliners licensed in Seychelles by nationality (1995-2000)

NATIONALITY	1995	1996	1997	1998	1999	2000
Taiwanese	109	162	171	90	107	65
Japanese	14	26	42	41	34	24
Korean	33	63	47	3	14	21
Indonesian	0	0	0	4	7	8
Spanish	0	1	11	10	12	13
French	0	3	5	1	1	1
Seychellois	1	4	6	6	8	9
Portuguese	0	0	0	0	3	2
Chinese	0	0	0	0	0	1
Kenyan	3	0	0	0	0	0
TOTAL	160	259	292	156	186	144

Source: SFA database

In the case of longliners, these licences issued by Seychelles cover only a fraction of longliners operating in the Indian Ocean. Though the fisheries agreement signed with the European Union in 1998 saw an increase over the previous agreement in the number of longliners authorised to fish in Seychelles waters from 15 to 32, there were few EU longliners that asked for a licence. In fact, in March 2000 only four French and one Spanish longliners had been issued fishing licences. The Spanish longliners which took licences fished mostly in the Southern Indian Ocean.

Seychelles started developing a monofilament longline fishery targeting swordfish (*Xiphias gladius*) and tuna at the end of 1995 and to-date has a fleet of ten longliners. Most of the vessels are around 18-22metres and made fishing campaigns of a week. In 2000 the total catch was 390 MT consisting of 52% of swordfish. The main problem facing this fishery is the high predation rate by the false killer whales (*Pseudorca crassidens*) and the Pilot Whale (*Globicephala melana*). In 2000 the predation rate averaged 11%.

In 1991 La Reunion had one longliner but especially as a result of fiscal incentives that number increased considerably and in 1997 it had an active fleet of 21 vessels ranging from 9 to 33 metres long. The trend in the value and catch of the fleet is shown in Figure 5 and the number of vessels in Figure 6. This fishery targets mainly swordfish from the equator to 32°S throughout the year. Though the predation in the swordfish fishery by marine mammals is quite important, it is not quite as high as what is happening in Seychelles. In general predation increases north of La Reunion.

4. TUNA PROCESSING

With such an important tuna resource in the Indian Ocean, it is not surprising that several countries have built tuna canning factories. By far, the most important country canning tuna is Thailand in the Eastern Indian Ocean and in Central and Western Indian Ocean there are canneries in Maldives, Mauritius, Madagascar and Seychelles. The cannery in the Maldives is the only cannery in the region which is entirely supplied by its own fleet.

4.1 Madagascar

The tuna canning factory in Madagascar (Antsiranana ex-Diego Suarez) was officially opened in 1991 and owned by the French consortium "Pêche et Froid". The cannery presently processes 130 MT tuna per day, being mostly skipjack. It has a cold store of 3,000 MT capacity, but has plans for expansion. The cannery employs approximately 800 persons and its main export market is France and the rest of Europe.

4.2 Maldives

During the 60s and 70s fish was the main export and Sri Lanka was the single export destination. Fish products included dried, smoked and salted fish. The dominant fish export was a variety particularly known as Maldivian fish. It was processed mainly by women who cooked and smoked dried it by the sun. The mechanisation of the fishing fleet in 1974 and the setting up of the Felivaru tuna processing plant in 1997 as a joint-venture between the Government of Maldives and a Japanese company led to canned tuna becoming the main export product of the Maldives.

The joint-venture party sold its shares to the Government in 1982 and the cannery was reopened in 1986 after extensive renovation, upgrading and capacity enhancement. To day the Felivaru tuna processing plant is an ISO 9002 PLANT with Higher Grade EFSIS approval with a Campden Accredited Laboratory and HACCP procedure. Felivaru cannery is the only cannery in the world which packs exclusively from pole and line. Fishing. The factory and the company are totally owned by Maldives Industrial Co. Ltd. (a 100% Maldives Government venture). Because of the nature of the fishery in the Maldives 90—95% of the tuna canned consists of skipjack tuna.

The factory produced 656,000 cases in 1998 and 629,000 cases in 1999 which were mainly exported to Europe, especially UK and Germany. 2,700 MT of fishmeal was produced in 1999 and exported to Sri Lanka. The capacity of the plant since its renovation in 1986 has remained at 60 to 65 MT output per day.

Because of the geography of the country, Felivaru has to operate and manage all utilities and services necessary for its efficient management. These include ice plants, desalination plants, storage for fresh water and fuel, canteen and kitchen facilities, sewage and waste treatment facilities, harbour facilities and recreation and dormitory facilities. It has a cold storage capacity of 750 MT.

Apart from the Felivaru cannery there are two other processing plants which produces only whole brine frozen tuna for exports to canneries.

4.3 Mauritius

The Mauritian Tuna Fishing and Canning Enterprise (MTCFE) which was in operation since 1972 as a joint venture between a Mauritian company and Japanese partners has been bought by Princes Foods and is now known as Princes Tuna (Mauritius) Limited. It has a daily output of 110 MT of tuna employs 1,324 persons.

MTFCE has been supplying Princes since a number of years and it became its primary supplier in 1989 when MTFCE was acquired by Mitsubishi.

Princes now operate in a new tuna and processing factory at Riche Terre covering an area of 6000m² will be built on 9.6 acres of land. It has a production capacity of 200 MT of canned tuna per day.

4.4 Seychelles

The Seychelles tuna cannery (Conserveries de l'Océan Indien) was opened in 1987 and was initially a joint venture with minority French partners. In 1995 H.J. Heinz acquired a 60% stake in the cannery with the Seychelles Government retaining 40%. Since then the cannery named Indian Ocean Tuna (IOT) has been expanding very fast.

The company has spent US\$33.4 million under the project 'Diamond' which was completed in July 2000 and which will boast the production capacity of the plant to 350 MT+ per day.

Some statistics from IOT are given below:

Some statistics from IOT are given below:

	1998 Jan - Dec	1999 Jan - Dec	2000 Jan—Dec
EXPORT SALES (SR'000)	381,412	551,321	606,219
PRODUCTION Capacity of the Plant MT or Raw Tuna / day	250	350+	350
Qty. of Raw Fish Processed per year (MT)	39,937	60,478	78,836
Fish Meal production per year (MT)	4,216	7,127	15,148
Fish Meal (SR'000)	5,919	11,546	23,400
No. of Employees at year end	1,608	2,081	2,300
Cold Storage capacity		Approx. 7000 MT	

1 US\$ = SR 5.34

IOT is by far the biggest company in Seychelles and one of the largest employers with 2,300 at the end of 2000. Canned tuna represented SR 606 million out of the SR 532 million of visible exports in 1999.

5 OUTLOOK

The tuna resources are becoming fully exploited in the Indian Ocean and it is inevitable that management measures will be implemented in the near future. At the same time the coastal countries

are seriously thinking of going into industrial fishing or at least increasing their existing catch. This obviously could create conflicts with Distant Water Fishing Nations (DWFN). The Indian Ocean Tuna Commission (IOTC) will have to start envisaging establishing allocation criterias for tuna fishing in the Indian Ocean.

This increased assertiveness of coastal countries will encourage DWFN to develop links with these countries either through joint ventures or by registering some of their vessels in countries rich in tuna resources. However, it is most likely that in the near future the purse seining fleets will remain under the control of French and Spanish interests although there are plans for Seychelles to develop its own fleet of purse seiners.

In the next few years countries of the Indian Ocean will make great efforts to improve on vessel monitoring and surveillance (VMS) especially by using satellite technology. There will be a real need for regional groupings to pool resources and cooperate in VMS activities so as to ensure the proper conservation and management of tuna resources. In this respect Seychelles plans to implement its own VMS system by the end of this year.

It is possible that there will be no major new canning factories in the region though the feasibility of a second cannery in Seychelles will be under serious consideration. The fact that Port Victoria is the major tuna port in the Indian Ocean gives it a competitive edge over other countries but the shortage of local labour and the relatively high operating costs are some considerations which could outweigh this advantage.

THE TUNA COMPANIES IN THE GLOBAL MARKET, PRESENT SITUATION AND FUTURE PERSPECTIVES TO TUNA MARKET OUTSIDE THE EU. AN INSIGHT FROM SOUTH EAST ASIA

By FRANCISCO TIU LAUREL JR.

PRESIDENT FRABELLE FISHING CORPORATION

First of all I would like to thank ANFACO for inviting me to speak at the 2nd European tuna conference. It is indeed a pleasure to be here in the beautiful City of Vigo, Spain and it is nice to see a lot of old friends and business associates once again.

OVERVIEW:



Since the last Vigo conference our industry has been volatile. While we hoped to remain optimistic and continue with our plans for the future, survival was a daily challenge. In the Philippines in particular, and Asia in general, this survival challenge and even future growth planning have become more intense. The major reason being the present system where there is currently no level playing field.

FISHING

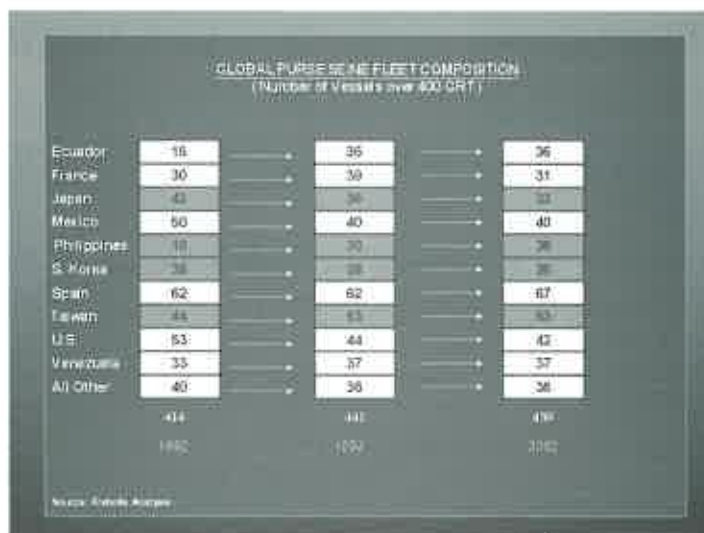


Table 1.1 (Number of purse seine vessels above 400 tons capacity)

The Philippines, Taiwan, Korea and Japan continue to fish tuna in the Western and Central Pacific. In addition, there are now a number of efforts by some operators to expand into the Eastern portion of the Pacific with the advent of larger and newer vessels that have recently come into service. It is also noted that other EU Countries have shown a keen interest in fishing in these waters. Memberships in the proposed regional body for the Western and Central Pacific have suddenly become sought after. In fact, Spain has already established itself in Kiribati.

The catch from the above vessels would normally go to their respective domestic canneries and to Bangkok, Thailand.

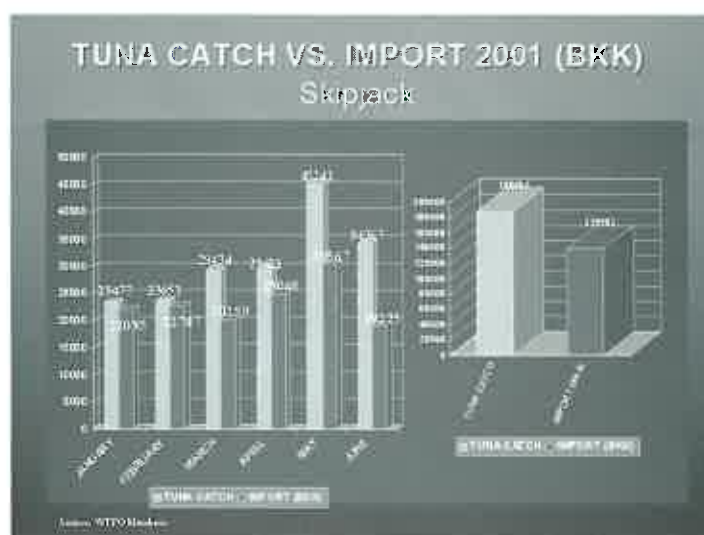


Table 1.2 (Chart on the Asian fleet catches of SJ vs. imports to Thailand)

While both Japan and the Philippines indicate that the present catch volume is not enough to meet their domestic demand. Korea processes a good 62% of their own catch, and the balance is exported to Bangkok or the Philippines. Taiwan on the other hand has a very small domestic demand and almost all of the catch is delivered to Bangkok and or the Philippines.

In general, the Asian tuna purse seine fleet is at a crossroad. The Philippines and Taiwan are expanding their fleets, while Korean seiners are struggling with higher operating costs, and the Japanese fleet is suffering even at a current market price average of 730 U.S. Dollars per metric ton. This is mainly due to the high cost of labor and to operating restrictions that have been imposed on them by their government.

PROCESSING, CANNING and the CANNED TUNA MARKET.

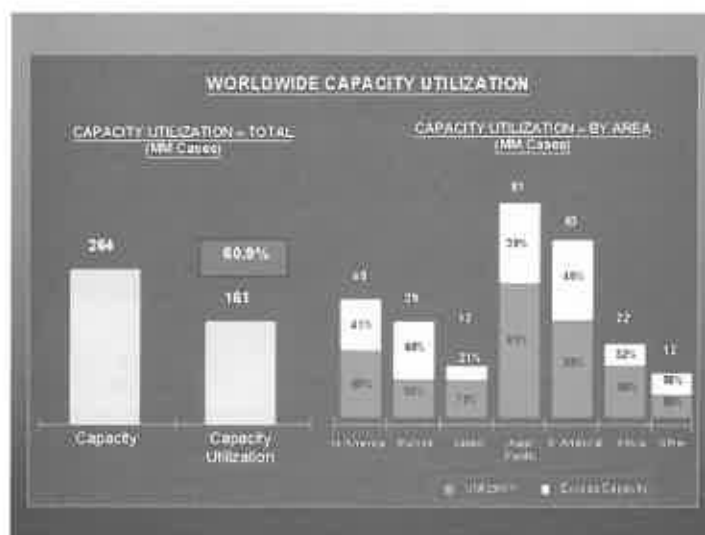


Table 2.1 (canneries utilization chart).

In the Philippines, canners continue to suffer, as most have been operating below their capacities. This year in fact, some of the plants have been closed due to financial difficulties. Originally, total capacity of Philippine based canners was around 800 tons per day, this has been reduced by about 40 per cent, and as stated above, most canneries in the Philippines operate at an estimated 60 per cent of their capacity.

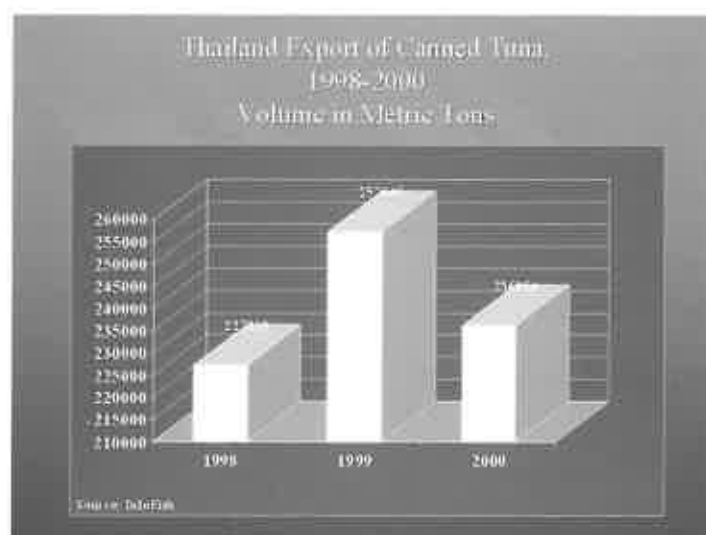


Table 2.2 (Thailand export of canned tuna)

In the case of Thailand, total volume has also gone down from previous years. This is mainly due to the effects of an excess in worldwide canning capacity serving a limited and unbalanced canned tuna market.

A cannery has also been established in Vietnam. Although this means a new and emerging market for the fishermen, we must bear in mind that this creates additional capacity in a setting where over capacity is already a problem.



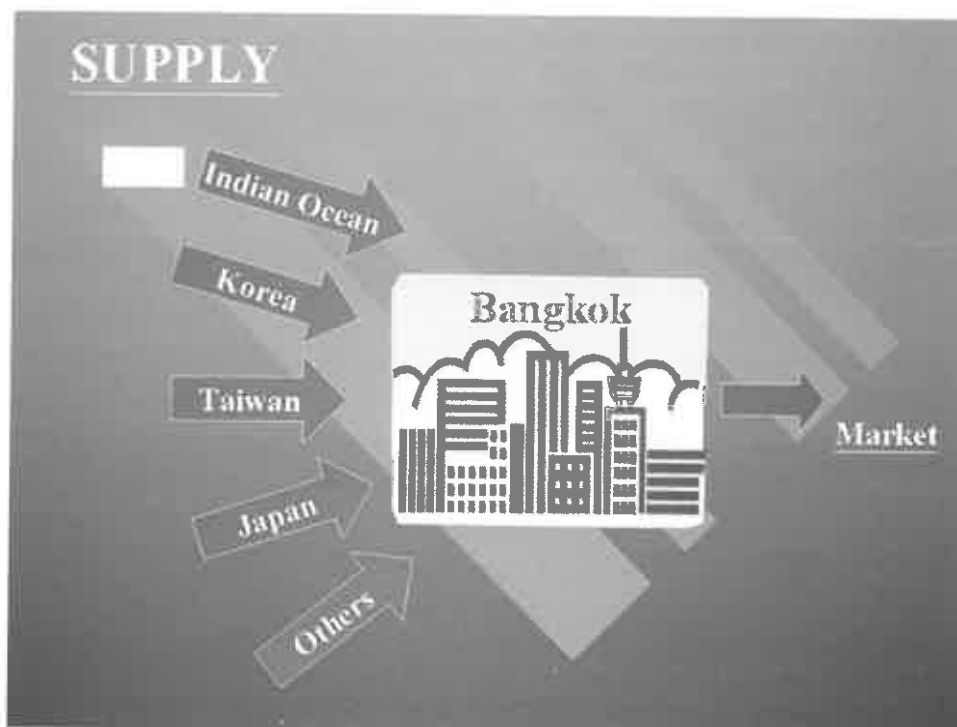
Slide : Canning pictures and labels.

The only advantage worth mentioning is that the canned tuna from the Philippines has a very good reputation; the same may be said for Thailand. The industry recognizes the industries high processing standards and highly efficient operations. For both countries however, the US market is the only market that they can compete in without being unduly disadvantaged. The Philippines and Thailand and other countries in the region continue to be left out of the LOME / ACP Countries EU qualified duty advantage. This continues to serve as one of the major stumbling blocks to what should have been a perfect market situation.

Here we are in Asia catching about 40 % of the world tuna supply, with the capability to process all of this into excellent finished products, disadvantaged by as much as 24 percent, in a market that is a member of World Trade Organization. Basically Asian packers are gradually losing their competitiveness in the global market, as even in the United States there is a possible move to extend NAFTA to the Andean countries.

The Philippine canners continue to suffer the effects of private labeling, a claustrophobic situation that they cannot get out of because the canned tuna industry continues to be a perfect oligopoly.

BANGKOK BOTTLENECK:



Slide : Bangkok bottleneck.

Comparing the Asian fishing fleets catch data with the Philippine and Bangkok canning capacities will immediately indicate why there is pressure on the producers to control their efforts.

At this time it is said that the Japanese Kenkai fleet (coastal fishing vessels) have also exported their produce to Thailand. It is either their excess catch, or the group is taking advantage of the Yen to US Dollar prevailing exchange rates. Adding to the volume is Thailand's own local fishing boats that have also reportedly been serving some of the demand of the canneries.

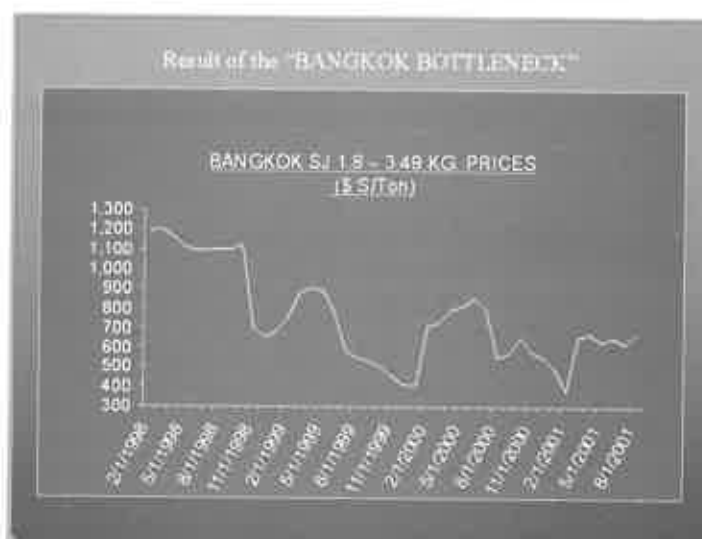


Table 3.1 (Result of Bangkok bottleneck)

This excess must go somewhere. Without alternative markets, this would put continuous pressure on the industry not only in Asia, but worldwide, because the reference prices used by the industry are determined by the Major Packers in Thailand. Raw material supply from Asia can reach Europe, Africa and South America. But given the present free market barriers, we are creating a "Bangkok bottleneck". What we have is certainly not a perfect market, as such; our industry will always be subject to instability.

It is important to note that raw materials are accepted by Bangkok from any country without restrictions. This is clearly evident in the co-packer arrangements that a number of Thai canneries have entered into with the brand owners. These agreements allow brand owners to supply raw material directly to the canneries using some raw material sourced outside of Asia.

FUTURE TRENDS:

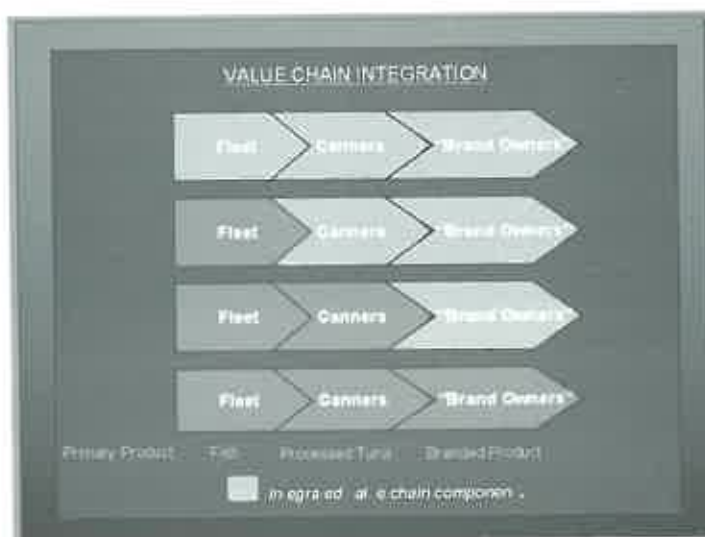


Table 4.1 (value chain integration)

Given all of these, players in the industry are positioning themselves based on their own foresight, and here are some options that are being considered.

1. **INTEGRATE** - Some players talk about integration. Business wise this makes sense amidst all the competition; it enables one to have full control, from catching the fish to marketing the finished product.

2. **SPECIALIZATION** - Brand owners however are diverging from integrated operations. Instead they are opting to specialize. Again this makes sense. With the present fleet and processing overcapacity they would rather focus on developing their product. They are doing away with their fixed costs. The industry is looking forward to their re-launching of the tuna product.

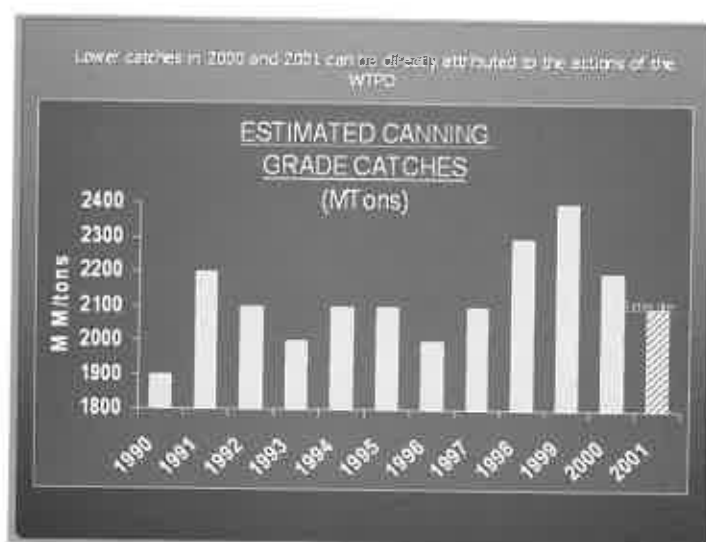
Slide : WTPO Slide

3. **COOPERATE** - Because of their inability to control outcome, the majority of the boat owners or the producers decided to cooperate. Said cooperation resulted in the creation of the WTPO. So far the group has been willing to make sacrifices and as a result, have managed to create an impact, which is good both for the industry and the resources. If this move will continue to gain its momentum then we will achieve a good balance of supply and demand. At the moment the group is hoping for full cooperation among all producers.

How this integration, specialization and /or cooperation will affect the industry and those involved will be something to look out for.

What might be thought of as illogical was the introduction of new boats and processing plants to an already overcrowded industry. Apparently some players see a niche within which they could ensure profitable operations. I think the competitive advantage created within some of these niches is artificial, having come about because of the presence of certain legislated trade barriers. The only reasonable excuse for one to justify a new vessel or new plant should be to increase efficiency and /or reduce cost.

CONCLUSION



With whole world economies turning global and with the advent of better communications and the internet. Shortages or oversupply, price and demand should no longer be factors one can take advantage of, but sad to say we are still in a situation where a mighty few in the industry controls the majority.

CONCLUSION

- Cooperation is Key
- The fishermen have taken the first step towards stabilizing the industry
- The processors and brand owners to come out with a better product
- The fisherman and cannery must drive change
- The processors now must drive consumption
- Move to abolish trade barriers for a level playing field

The stabilizing effect in price which resulted from the lead taken by the fishermen on the formation of the World Tuna Purse Seine Organization, I hope will serve as a cue. Cooperation is the key to stability not only among the fishermen but also with the processors and eventually the brand owners. Once this is established, along with the abolition of the trade barriers that have been imposed, we can see a better tuna industry for all players.

PONENCIA / *SESSION*

7

SITUACIÓN ACTUAL Y PERSPECTIVAS FUTURAS DEL MERCADO DEL ATÚN EN CONSERVA Y SUS MARCAS EN LA UE

PRESENT SITUATION AND FUTURE OUTLOOK OF THE TUNA MARKET AND ITS BRANDS IN THE EUROPEAN UNION

MR. ALAIN CASSUTO,

PRESIDENTE DIRECTOR GENERAL DE PECHE ET FROID, S.A.

MR. PIERRE COMMERE,

SECRETARIO GENERAL DE FIAC

MR. DAVID SCHARPIRA,

DIRECTOR DE MARKETING TRINITY ALIMENTARY ITALIA SpA

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DIRECTOR GENERAL DE JEALSA-RIANXEIRA. S.A.

MODERADOR:

SR. D. JOSÉ LUIS CALVO PUMPIDO,

PRESIDENTE Y CONSEJERO DELEGADO DEL GRUPO CALVO

VIGO 2001 EUROPEAN CONFERENCE OF TUNA THE FRENCH MARKET

PRESENTATION BY ALAIN CASSUTO

PRESIDENT OF PÊCHE ET FROID

- | | |
|----------------------------|------------------|
| ■ History of Tuna | ■ Tuna Marketing |
| ■ French Production | ■ Buying habits |
| ■ French Market | ■ Promotions |
| ■ Imports | ■ Prices |
| ■ Exports | ■ Advertising |
| ■ Consumption | ■ Market Trends |
| ■ Type of markets | |
| ■ Type of products | |
| ■ Branded and O/L products | |

A BRIEF HISTORY OF TUNA IN FRANCE

FROM 1950 to 2001

- 1950: French market = 5000T of Albacore (Tropical Tuna=0)
- 1951: 1st fishing of tropical tuna (Longliners in Senegal)
- 1955: 1st canneries in Senegal 10.000 T in Dakar.
- 1965/70: Construction of 1st generation of purse seiners (70m)
- 1970: 1st cannery in Ivory Coast (Saupiquet)
- 1980 Deployment of European fishing fleets in the Indian Ocean
- 1985 Construction of a cannery in Madagascar. (Pêche et Froid)
- 1950 to 2000: Tropical Tuna market in France grows from 0 to 85000 T (Today Albacore is 3000T).

FRENCH PRODUCTION

CANNED FISH FRENCH TOTAL MARKET

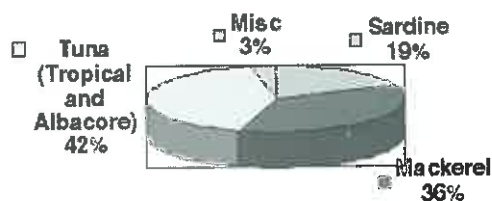
- 2000/1999 Production + 3% in volume
- 2000/1999 Production + 9% in value
- 20 factories in France
- 95.078 T of raw fish used in 2000
- vs 91.192 T used in 1999
- 40.170 T for Tuna (Tropical and Albacore) in 2000.

CANNED FISH PRODUCTION:

FRENCH MARKET BREAKDOWN

CANNED FISH PRODUCTION: FRENCH MARKET BREAKDOWN

YEAR 2000 in tons

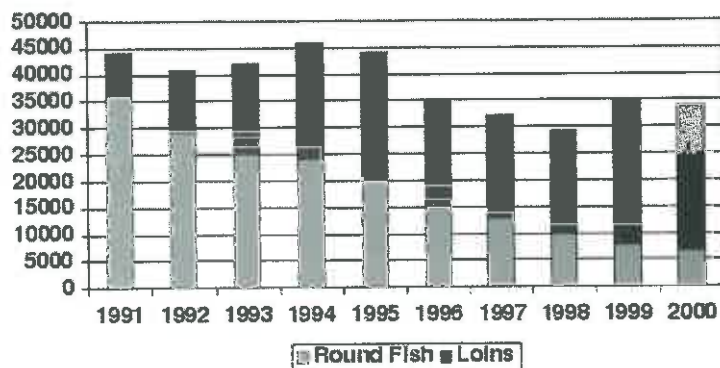


TROPICAL TUNA:

FRENCH PRODUCTION

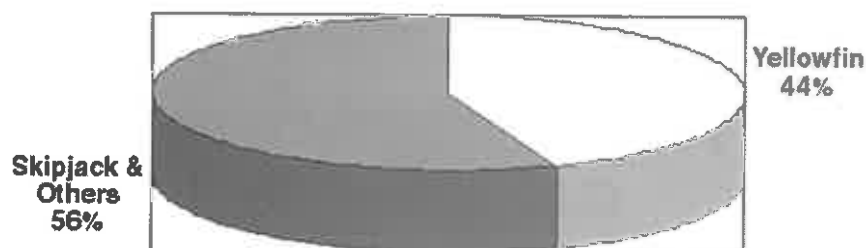
- The french industry processed 36.142 T in 2000
- + 7% vs. 1999
- -16% for round fish
- + 13% for loins
- Loins represent now 85% of raw material
- Constant progression of loins since 1991

RAW MATERIAL BREAKDOWN



TUNA PRODUCTION BREAKDOWN BY TYPE OF FISH

YEAR 2000



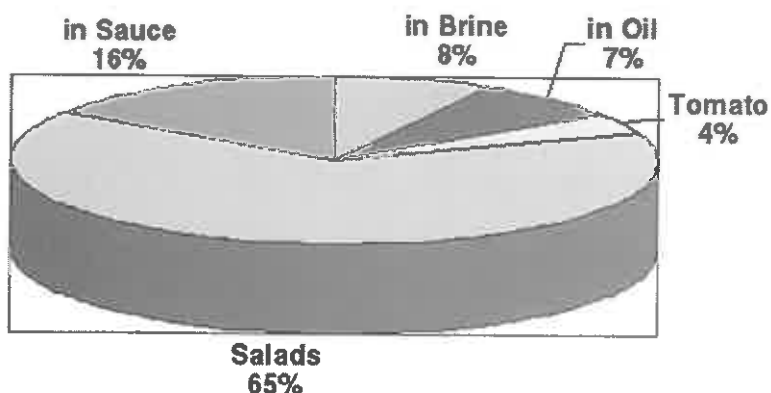
TUNA PRODUCTION MIX

- In 2000 French canneries produced 223 MC
- (i.e. 42.664 Net Tons)
- + 7% in total which reflects different variations.

–Natural	– 5%
–Oil	–29%
–Salads	+24%

TUNA PRODUCTION MIX

Year 2000 by weight



EVOLUTION OF FRENCH

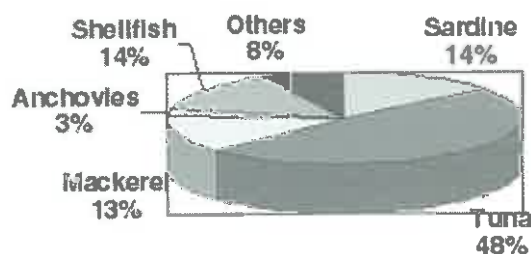
PRODUCTION

- More and more added value.
- Salads and other preparations will take an increasing part in french production.
- Production of brine and oil cans is coming from french owned canneries in Ivory Coast, Seychelles, Madagascar, Senegal, Ghana,...

TUNA FRENCH CONSUMER MARKET

TUNA AMONG OTHER CANNED FISH

Total Market in net tons = 155.000 T
Tuna = 75.000 T

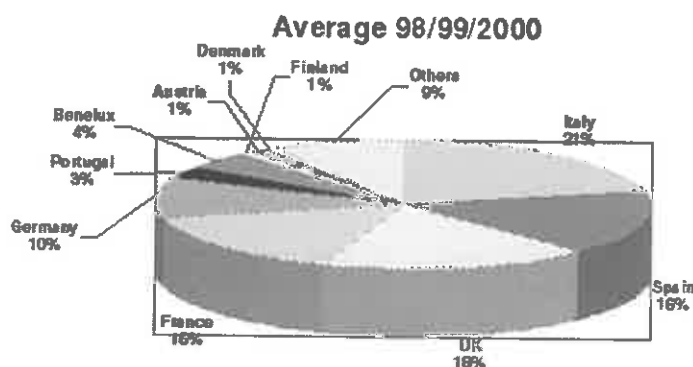


TUNA IN EUROPE

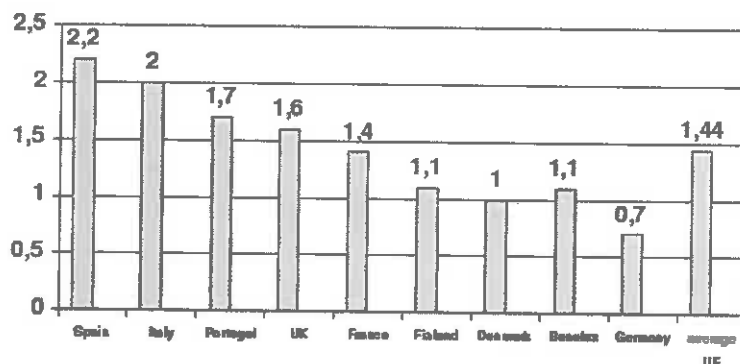
- UE market represents approx 541.000 T on average for 98/99/2000.
- Ou of which France accounts for 85.000 T.
- 5 biggets countries in UE are

–Italy	21%
–UK	18%
–Spain	16%
–France	16/
–Germany	10%

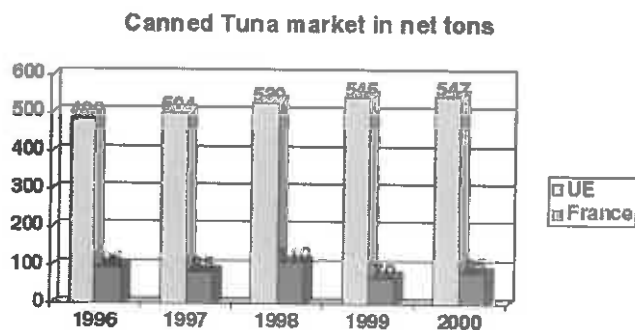
EUROPEAN MARKET BREAKDOWN



AVERAGE IN KG/CAPITA



UE AND FRENCH MARKET : 5 YEARS EVOLUTION



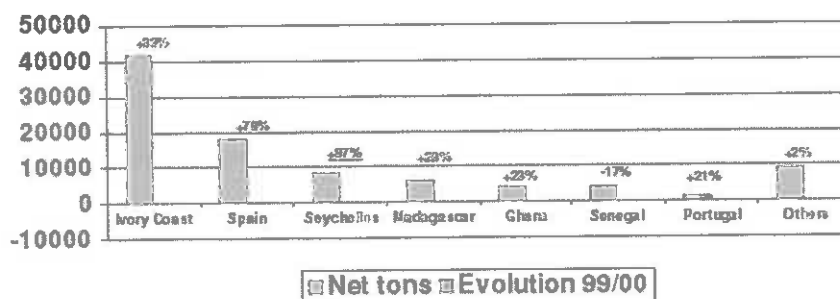
FRENCH MARKET

INPUT/OUTPUT (net tons)

	1996	1997	1998	1999	2000
PRODUC	39.2	37.3	37.5	41.5	44.4
IMPORT	85.1	80.9	93	70	96.4
EXPORT	28.4	34.8	24.3	42.8	64.2
MARKET	96.9	83.8	106.2	68.7	85

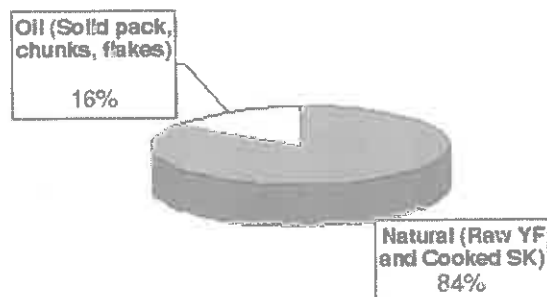
FRENCH IMPORTS OF CANNED TUNA

YEAR 2000 IN NET TONS
GLOBAL EVOLUTION 99/00 = +38% TOTAL
IMPORTS 96500 T



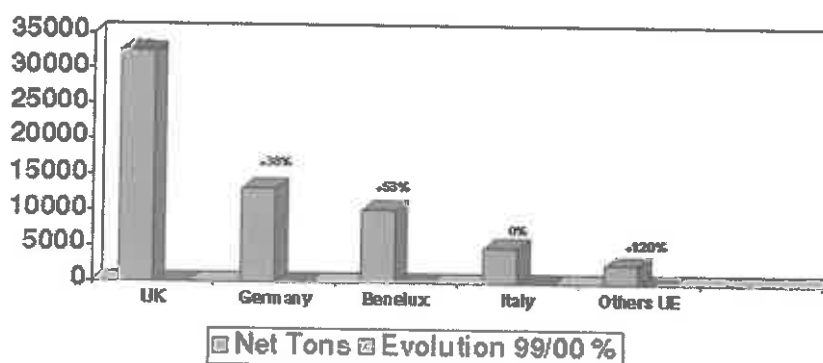
FRENCH IMPORTS OF CANNED TUNA

SPLIT BY TYPE OF TUNA
(Raw YF is a particularity of French market)

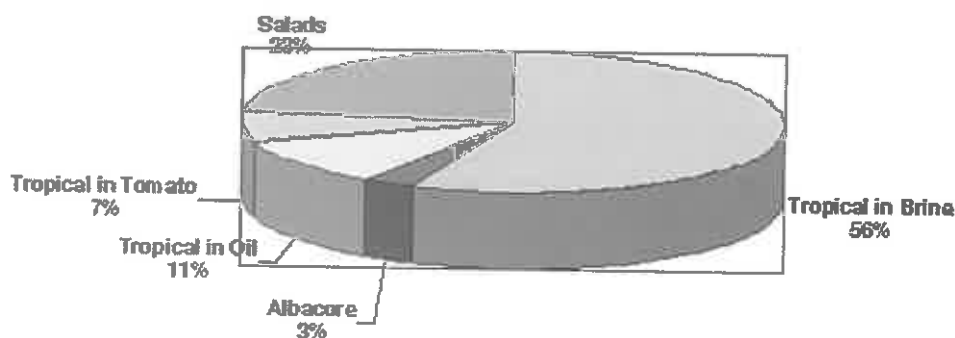


CANNED TUNA FRENCH EXPORTS

GLOBAL EXPORT 64200 T
= +50% IN 2000/99



TUNA FRENCH MARKET PRODUCT MIX

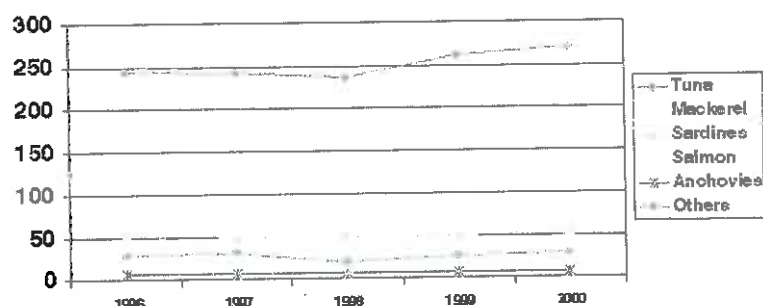


EVOLUTION OF THE MARKET

- Tuna and other canned fish
- Brine
- Oil
- Salads
- Tomato

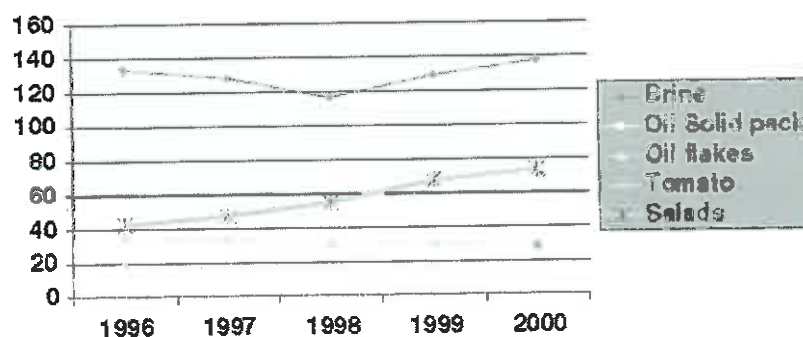
Canned fish market: 5 year evolution

(Source: Secodip)

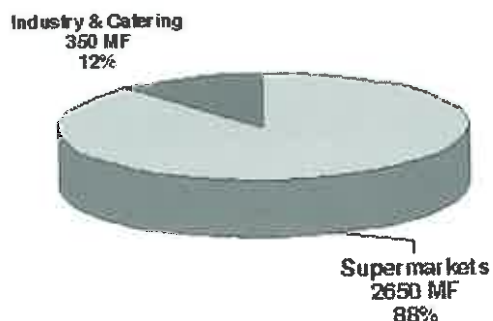


Canned tuna market: 5 year evolution

(Source: Secodip)



TUNA FRENCH MARKET CUSTOMER MIX



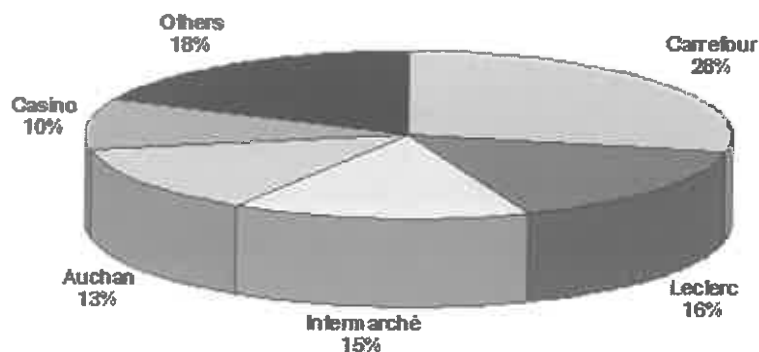
CATERING AND INDUSTRY

- Tuna Turnover: 350 MF.
- Market sectors:
 - Public restaurants (Hospitals, schools.) 30%
 - Restaurants Multiple Chains (McDo, Pizzas,...) 40%
 - Traditional market (Bistros, Bakeries,...) 30%
- Big potential for evolution especially in the restaurants multiple chains and sandwich markets.
- Main actors are SAUPIQUET and PECHE & FROID who represent 85% of this market.

SUPERMARKETS

- Tuna Turnover: 2,650 MF.
- Purchasing is now organized in
- «Super centrales d'achat».
 - Carrefour/Promodes 28%
 - Lucie (Leclerc + U) 21%
 - Opéra (Casino+Monoprix+Leade Price+Cora/Coop.) 17%
 - Intermarché 15%
 - Auchan 13%

RETAIL MARKET IN FRANCE MARKET SHARE



RETAIL MARKET

Numer of stores (2001)

■ Hypermarkets (>2500 sqm)	1175
■ Supermarkets (>2500 sqm)	5629
■ Hard Discount	2520
■ Department stores	430
■ «Superettes» (>«300 sqm)	2428

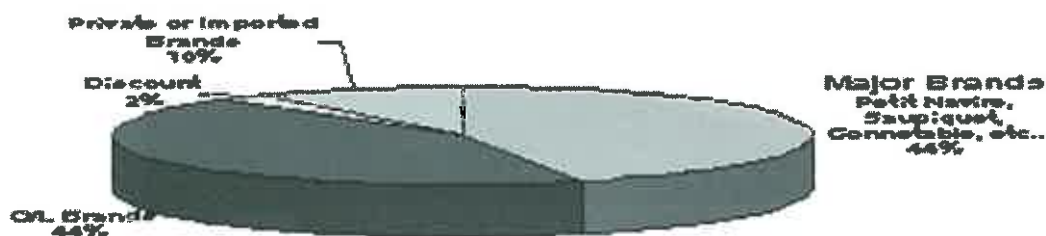
■ Trend:

- Hypers → No more construction
- Supermarkets → Increase the surface
- Hard Discount → Slowdown

BRANDS

Situation and Trends

TUNA FRENCH MARKET BRANDS MIX



BRANDS EVOLUTION

- 20 companies in 1980, 5 in 2000
- 1975: 1st Own Label's brands. (CARREFOUR)
- 1980: 1st Discount stores and economy brands.
- Own Label Brands:
 - 21% of total grocery turnover
 - 37% of canned fish turnover
 - 44% of canned Tuna turnover. (Saupiquet and P&F=85%)
- Private Brands (Total 44%)
 - Saupiquet: 23%
 - Paulet (Petit Navire) 21%

TUNA MARKETING

- Events concerning eating habits:
 - Positive for Tuna (ESB, Dioxine, Foot and Mouth)
 - Negative for Tuna (pollution of the sea: Oil, Heavy Metals)
- Consumer behaviour:
 - Convenience products (salads, hors d'œuvres)
 - Healthy Eating (Sunflower oil, virgin olive oil...)
 - Easy to use packaging (Barquettes, pouches...)

TUNA MARKETING

- In store promotions
 - Now 40% of the sales
- Advertising:
 - **From 1975 to 1982:** Institutional advertising campaign for tuna («Le thon c'est bon», «le thon est le steak de la mer». Budget 7MFF/year.
 - **Since 1982** only brands have and advertising budget (very seasonal from may to aug). Mainly for Salads and tuna in Brine. (Tv and Billboards) (Approx 50 MFF/year)

TUNA MARKETING PRICE STRUCTURE

PRODUCT	IND PRICE	RETAIL PRICE	RETAIL MARGIN
SK in Brine Economy Brand	0.46 €	0.61 €	20%
YF in Brine O/L Brand	0.69 €	1.22 €	40%
YF in Brine Private Brand	0.84 €	1.37 €	33%

TUNA MARKET IN FRANCE

THE FUTURE

- Tuna is a food product of high quality which benefits from a healthy image. This is a very strong asset at a time when consumers are getting less and less confident about what they buy on the supermarket shelves?

- The industry will have to capitalize from this very advantageous position in order to catch more consumers and ensure constant growth over the coming years

How can we do that?

- By improving the healthy image of the product:

- Tracability
- Tuna Marketing to educate the consumers on the various Tuna Species and their respective quality.
- Improved communication on the healthy benefits of Tuna

- By improving the quality of the products:

- Improved presentation: Filets
- More convenient packaging: Pouches

- By suggesting new way of eating Tuna

- Salads, ready to use Sandwich Mixture

- By finding new Consumers

- Children products?
- Bio, organic consumers?

THE ITALIAN TUNA MARKET

MR. DAVID J. SCHAPIRA

MARKETING DIRECTOR

TRINITY ALIMENTARI ITALIA S.P.A.

CERMENATE - ITALY

Abstract

This paper outlines the current status of the Italian tuna market and its perspectives for future growth

Introduction

Exactly ten years ago, my colleague Alberto Benveniste, Trinity's Procurement Director, presented a paper on the Italian market at the World Tuna Conference in Bali in 1991. I would like to pick up where he left off by showing you what has changed in the last decade and by trying once again to sum up the peculiarities of the Italian tuna market.

Italy is currently the largest retail tuna market in the E.U. with an estimated consumption of approximately 100,000 tons in the year 2000. Despite a 97% household penetration and a per-household annual consumption of over 3.5 kilograms, among the highest in the world, the total market volume keeps growing; in 2000, volume growth was approximately 5% and 2001 will probably exceed these levels, in part because of the "mad cow" phenomenon.

In 2000, the canned tuna category ranked 10th in packaged foods (excluding beverage) and accounted for 2.5% of sales.

The product

The Italian market has historically been dominated by canned tuna in olive oil. Today, tuna in olive oil represents approximately 85% of total canned tuna consumption; tuna in brine covers a further 10%, tuna salads and dressed tuna accounting for the remaining 5%.

The importance of the olive oil segment is undoubtedly the result both of the Mediterranean heritage which holds olive oil to be healthy and nutritionally well-balanced, and of the traditional preservation techniques used by the local tuna fishermen in Southern Italy for centuries. Tuna in vegetable oil is virtually nonexistent in the retail market. The recent "rediscovery" of the health benefits of Mediterranean cuisine in general, and of the virtues of olive oil in particular, is expected to give further impetus to the growth of this segment which will certainly dominate the tuna market for the foreseeable future.

Tuna in brine remains steady at approximately 1/10th of total consumption. Although theoretically "in sync" with the growing trends towards fitness and well-being of the last decade because of its low calorie content, this segment has never overcome the strong drawbacks associated with its lack of taste and poorer texture in comparison to tuna in olive oil.

Although these facts alone would be enough to make the Italian tuna market unique, there is more!

The Italian consumer expects tuna to be pink, firm in texture yet tender, and mild in taste. The net result of these preferences is that the Italian market is dominated by yellowfin tuna, making our country the largest yellowfin tuna importer in the world.

A further difference is linked to the way in which tuna is consumed in Italian households. While tuna is the Italian housewife's "wild card" because of its versatility, 90% of households use it mostly "as it is", accompanied by a salad, by tomatoes, by beans, etc. This is radically different from the US and the UK markets where tuna tends to be mixed with other ingredients and dressings in order to prepare sandwiches, or the French market where tuna is "sprinkled" over a salad, and explains why the Italian tuna market is a solid pack market.

And finally, tuna sold in the retail market in Italy is packaged in easy-open cans, 80% of which are cluster-packed in lots of 2 to 4 cans. Over half the market volume is sold in 80g cans.

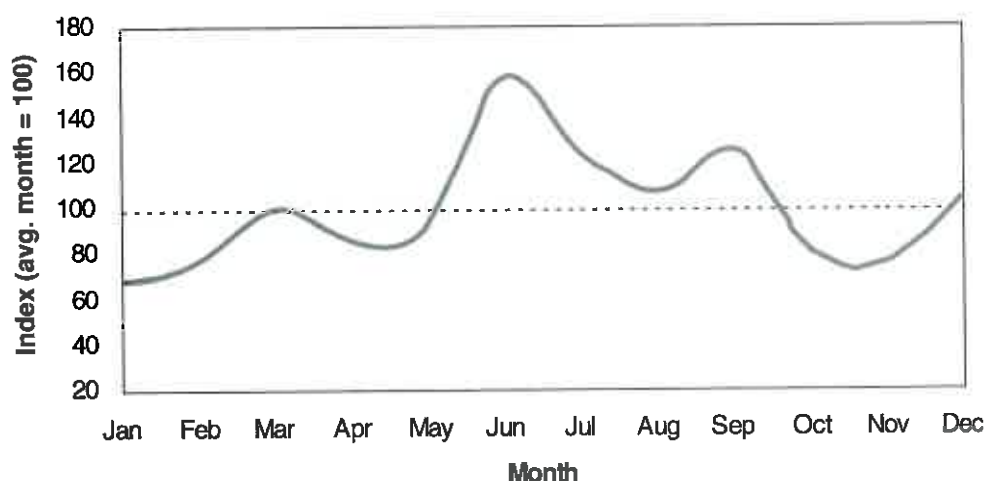
The sum of the factors outlined above (olive oil, yellowfin, solid pack, easy open) makes the Italian market one of the highest quality tuna markets in the world.

Seasonality

Consumption of tuna in Italy is highly seasonal as approximately 50% of total volume is sold between June and September. As a consequence (or as a cause?) of this seasonality, the industry's advertising investments and promotional activities have invariably been concentrated in these four months of the year.

Tuna market seasonality¹

(Jan.-Dec.2000, index vs average month, oil + brine)



¹ Source: IRI Infoscan (Hypermkts + Supermkts + Superettes).

Competition

Much has changed in the competitive arena since Mr. Benveniste spoke in Bali.

The top 6 brands of tuna in oil accounted for 80% of total retail sales by volume in 1990; today their combined share has fallen to approximately 70%. This is due mainly to the sum of two successive phenomena:

- The growth of hard discounts in the early nineties. The share of discounters grew rapidly reaching a peak in 1997 and now appears to be stabilised at approximately 10% of tuna in oil volume.
- The growth of private labels as a direct consequence of the rapidly accelerating concentration of the Italian trade. Today private labels account for roughly 10% of tuna in oil volume (in the tuna in brine segment, however, their share is more than double this number). Although the main reason for these low shares is the fact that the consolidation of the Italian trade is still far behind that of our European neighbours, the growth of private labels has been hindered by the aggressive pricing policies of several branded tunas (which in some cases cost up to 12% on average less than the own label products).

While absolute concentration has not changed much and the names of the major tuna brands on the market remain the same, their relative shares and their ownership have been completely revolutionised.

Nostromo, Italy's number 2 brand belongs today to a leading Spanish group. Star, another long-standing brand, belongs to a joint-venture between the Italian food producer Star and another major Spanish producer. Mareblù now belongs to Heinz. Of the leading brands, only Palmera, Maruzzella and Rio Mare have remained virtually unchanged in their ownership structure.

These changes have led to new strategies whose effects we are beginning to see and will keep witnessing in the future. The first order effects of the changes of ownership are linked to procurement; Nostromo, Mareblù and Star no longer can tuna in Italy but import the finished product. As a result, finished products accounted for 37% of total tuna imports into Italy in the first quarter of 2001 versus 26% in 1999 and virtually zero in 1990².

A further effect of the change in ownership is the renewed financial vigour which we have witnessed in the past few years in the drive by several competitors to gain share by investing heavily both in pricing and in advertising. Although both types of investment have undoubtedly helped grow the market, the pressure on prices severely limits the profitability of the entire industry.

Tuna in oil

Advertising investments 1997 - 2000³

	1997	1998	1999	2000
Million ? (current)	9,3	10,5	12,8	14,7
GRPs	8.629	8.667	9.068	10.452

² % of round equivalent volume.

³ Source: NASA.

Tuna in oil

Price index (market average = 100)⁴

	1997	1998	1999	2000
Rio Mare	103	103	103	102
Nostromo	93	92	91	93
Star	96	93	92	88
Palmera	92	93	88	88
Mareblù	92	89	89	85
Private Labels	95	92	93	97

Trinity's brand Rio Mare continues to be outright market leader in all segments of the tuna market with a share which in most cases is nearly three times that of its closest competitor. Nostromo is the number 2 player in the key tuna in oil segment with a 12% share, followed by Star (9%), Palmera (7%), Mareblù (6%) and Maruzzella (6%)⁵.

Promotion

Price, and more specifically, retailers' cut price, has become the dominant form of promotion. In 2000, approximately 50% of total volume was sold with some sort of promotion and, on average, each outlet promoted the tuna category for 48 weeks during the year.

While this type of promotion has helped grow the market by keeping prices low and by loading the consumer, it has subtracted resources from other forms of investment aimed at expanding tuna usage through consumer education, and has helped strengthen the retailers at the expense of the brands' equity.

Trinity has always placed particular emphasis on the importance for national brands to concentrate on non-price promotions in the interest of both industry and trade. A given investment diverted from retailer's cut price promotions to other types of consumer promotion (eg. "megapacks", sampling, cross-couponing, in-store tastings, collections) is more efficient because it delivers most of the investment directly to the consumer, and is more effective (at least in the long run) because it reinforces the brand's equity rather than impoverishing the product's image.

From the distributors' point of view, helping national brands to invest in non-price promotions contributes to defending the category's value, and therefore its profit-making potential, as well as giving private labels a chance to compete.

Innovation

In the past 10 years, the products themselves have undergone very little change. Although efforts have been made over the years by several major competitors, the Italian consumer has proved to be quite refractory to innovation in the basic tuna business.

⁴ Source: IRI Infoscán (Total Italy excluding discounts).

⁵ Source: IRI Infoscán (Total Italy excluding discounts), year ending December 2000.

I am aware of only one notable exception to this rule: the launch of a range of "Mediterranean tuna recipes" under the Rio Mare brand. These products, specifically designed to be used to season pasta, Italy's staple food, have helped grow consumption by targeting a pre-existing but under-exploited usage of tuna and by adding a strong element of convenience: where plain tuna was used as an ingredient which required further processing before being used as a pasta sauce, the new Mediterranean range is ready to use straight out of a can. By providing a wide range of typical pasta seasoning recipes, these products allow the consumer freedom of choice as well as convenience, and by focussing on pasta, a year-round dish, they contribute to the de-seasonalisation of tuna consumption.

Why has innovation been so slow in this sector compared to other food markets? Basically because Italians can find nothing wrong with tuna as it is today; it is considered a convenient, excellent "value for money", healthy and genuine product, free from preservatives, rich in nutritional elements, which can be used in any situation both as a ready-to-serve main course or as an ingredient for more elaborate recipes.

Any innovation which tinkers with the product's perceived quality or its versatility, even in exchange for added convenience, is a huge risk in a market as quality-conscious and as attached to the "wild-card" nature of tuna as Italy. In other countries, some leading companies are launching no-drain retail-size tuna pouches which are being hailed as the "next generation" tuna: this may well prove to be a winning idea as far as their markets are concerned, but I believe that the Italian consumers will never accept to pay more (or even the same!) for a "super-convenient" chunk product as they do for their current solid pack tuna in a can.

The future

The challenge which branded tuna producers face for the future is finding the tools to keep the Italian tuna market growing profitably.

The "share wars" which we are witnessing today, while undoubtedly harmful to the overall industry's profitability in a growing market, would prove to be disastrous in a stagnant one!

The key issues which the industry will need to address in order to unleash this growth are:

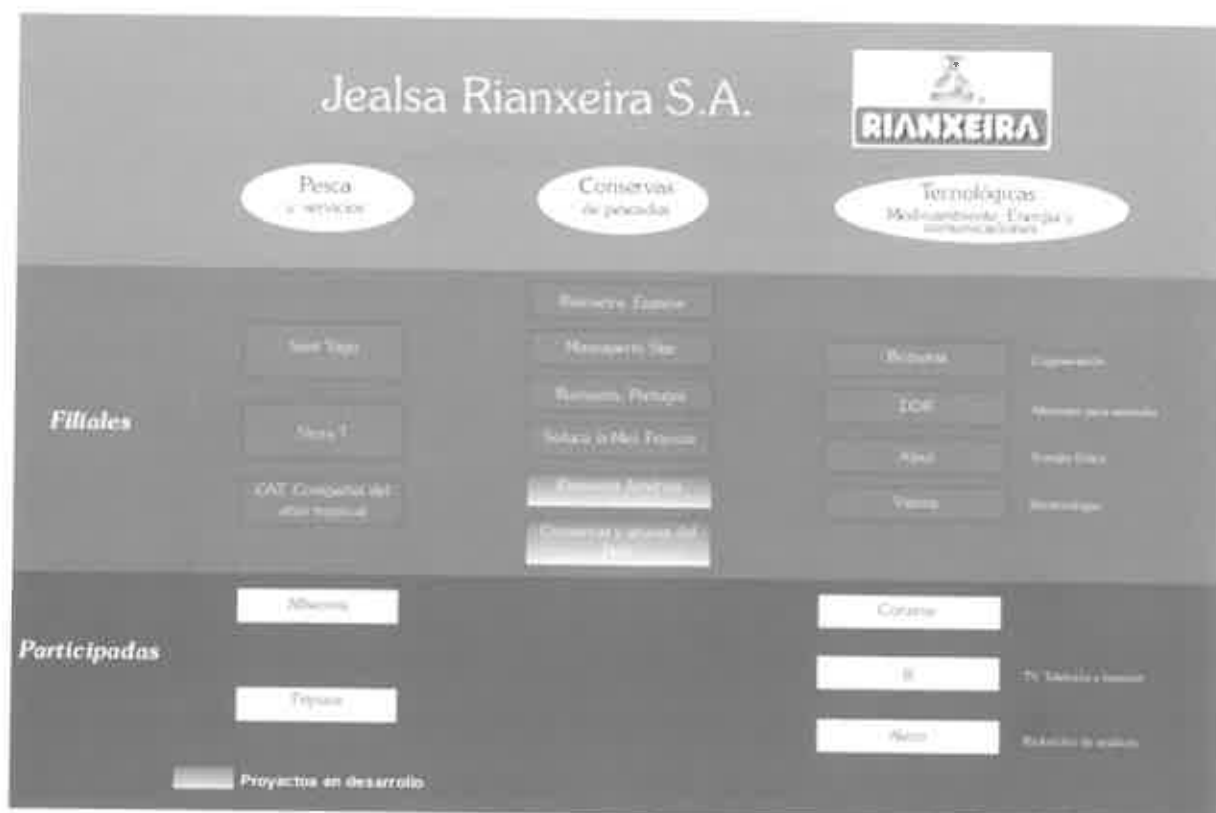
- Invest on the consumer rather than in price-off promotions;
- Exploit the untapped potential which probably underlies in the relatively low consumption levels of the off-season by reminding the consumer even outside of peak season and by suggesting appropriate recipes;
- Leverage and communicate the nutritional and convenience benefits of tuna relative to its substitutes;
- Innovate, not simply by multiplying SKUs, by reducing the product's versatility or its perceived quality but by identifying latent or partially satisfied needs and by tailoring the product to these needs;
- Defend the category's value so as to ensure continuing trade support and focus.

ANFACO - CONFERENCIA ATUN 19/09/01 CONSERVAS DE ATUN Y SUS MARCAS EN ESPAÑA

D. JESÚS M. ALONSO ESCURÍS
DTOR. GRAL. DE JEALSA-RIANXEIRA

INDICE:

- > 1.- Presentación
- > 2.- El Sector. Teoría del Petrolero.
- > 3.- El Consumo.
- > 4.- Los Factores
- > 5.- Economía y Finanzas
- > 6.- Modelos. De Empresa. De Sector

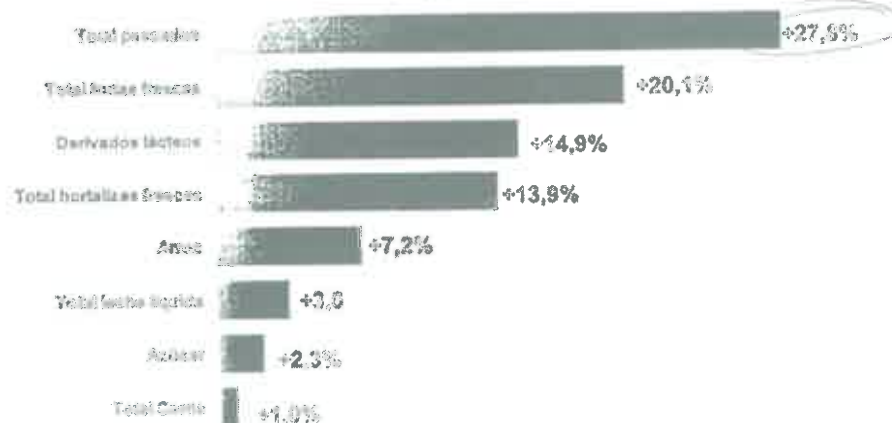


2. El Sector. Teoría del petrolero.

3. El Consumo.

El impacto de la crisis alimentaria en el consumo

El Consumidor español busca una alimentación básica cada vez más Mediterránea, reduciendo el peso de las proteínas animales.



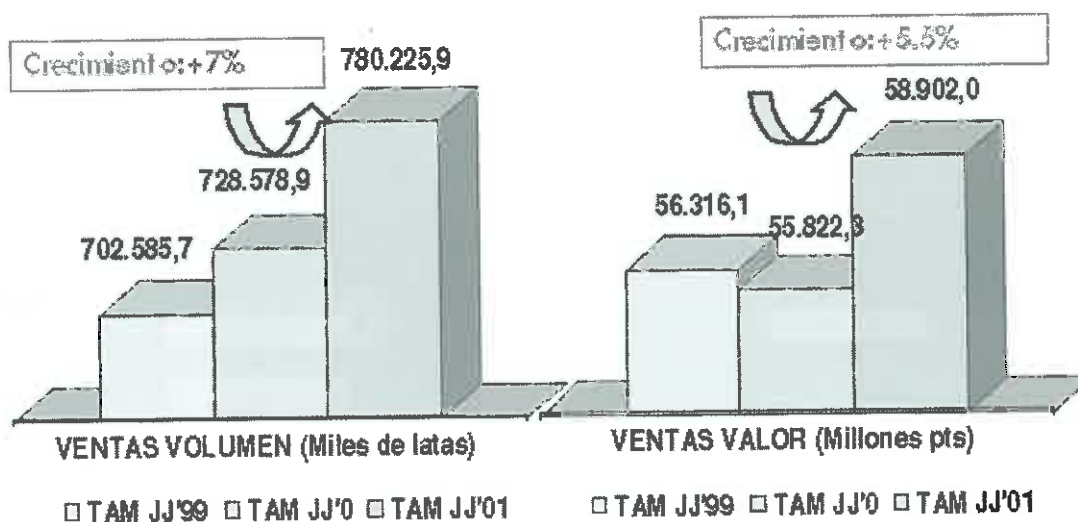
% crecimiento año 2000 vs 1996

Information
Resources

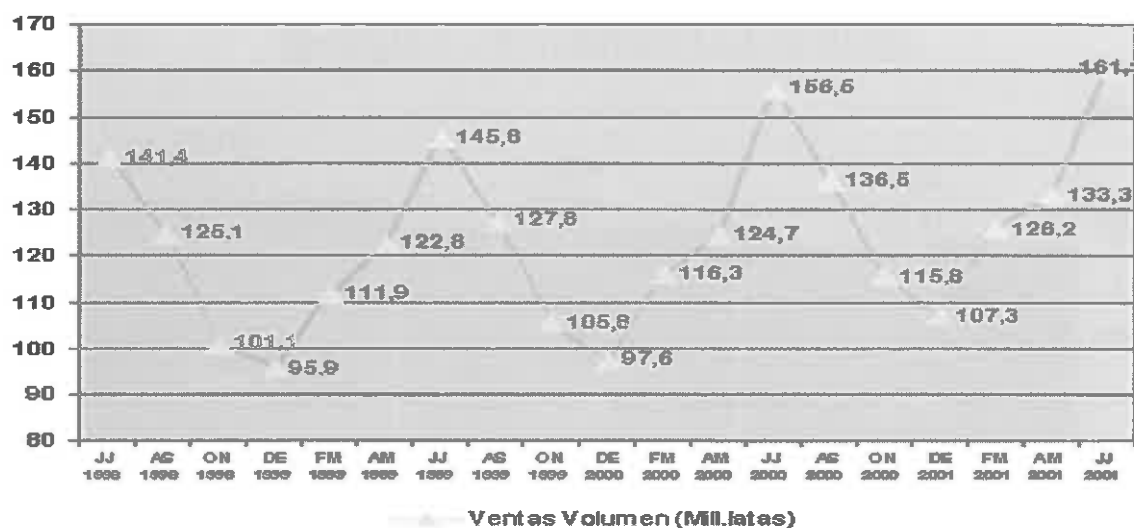
Fuente: monitor - INIA - PANFI



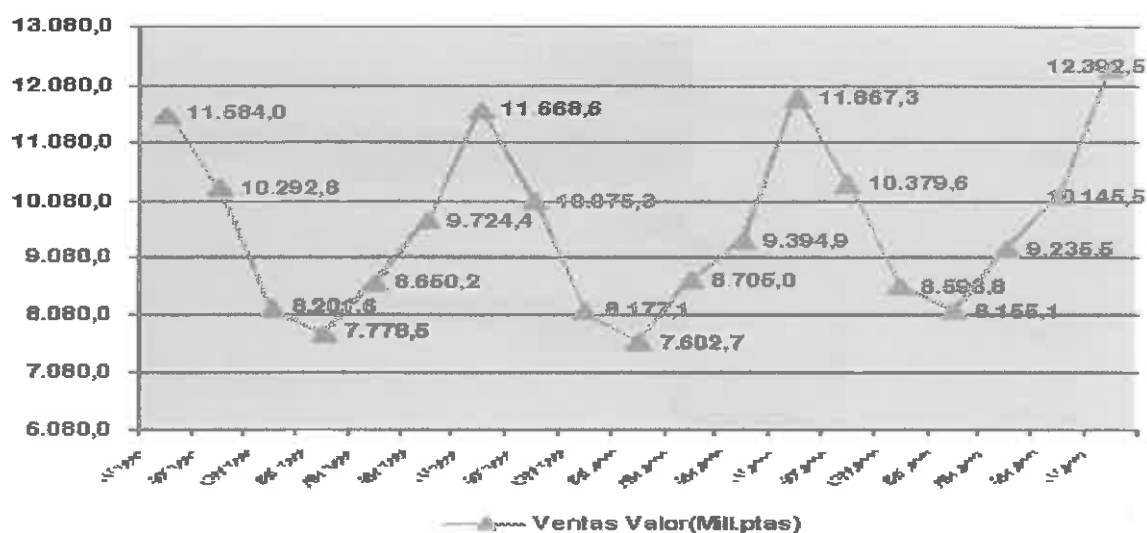
TOTAL ESPAÑA (Incluido Canarias) EVOLUCION VENTAS DE ATUN (tres años) Volumen (Miles de latas) Valor (Mill.pts)



TOTAL ESPAÑA (Incluido Canarias)
EVOLUCION VENTAS VOLUMEN DE ATUN
Tres años de historia por periodos Bimestrales



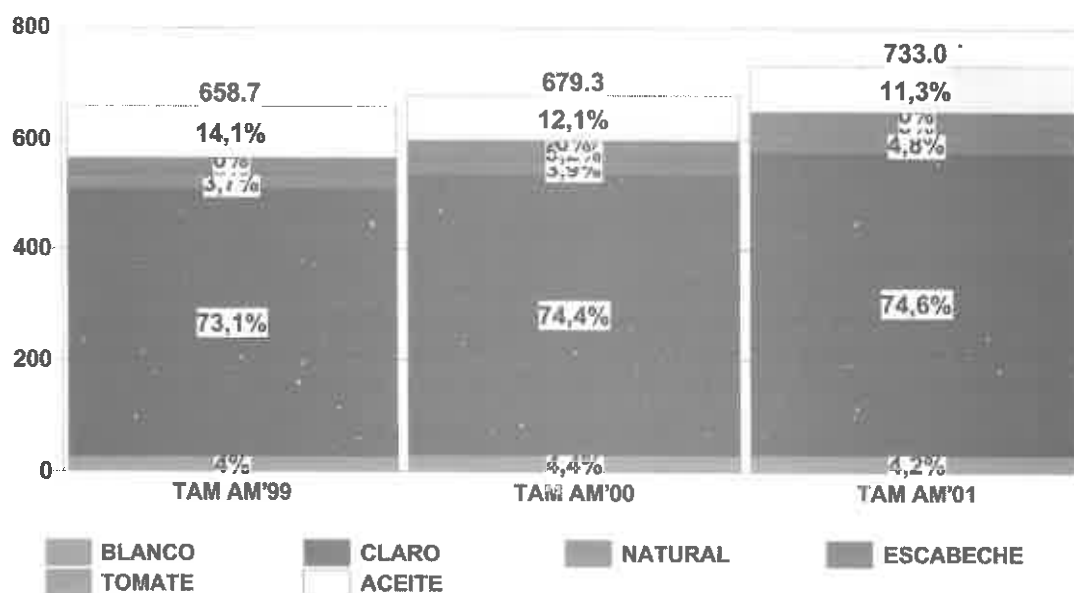
TOTAL ESPAÑA (Incluido Canarias)
EVOLUCION VENTAS VALOR DE ATUN
Tres años de historia por periodos Bimestrales



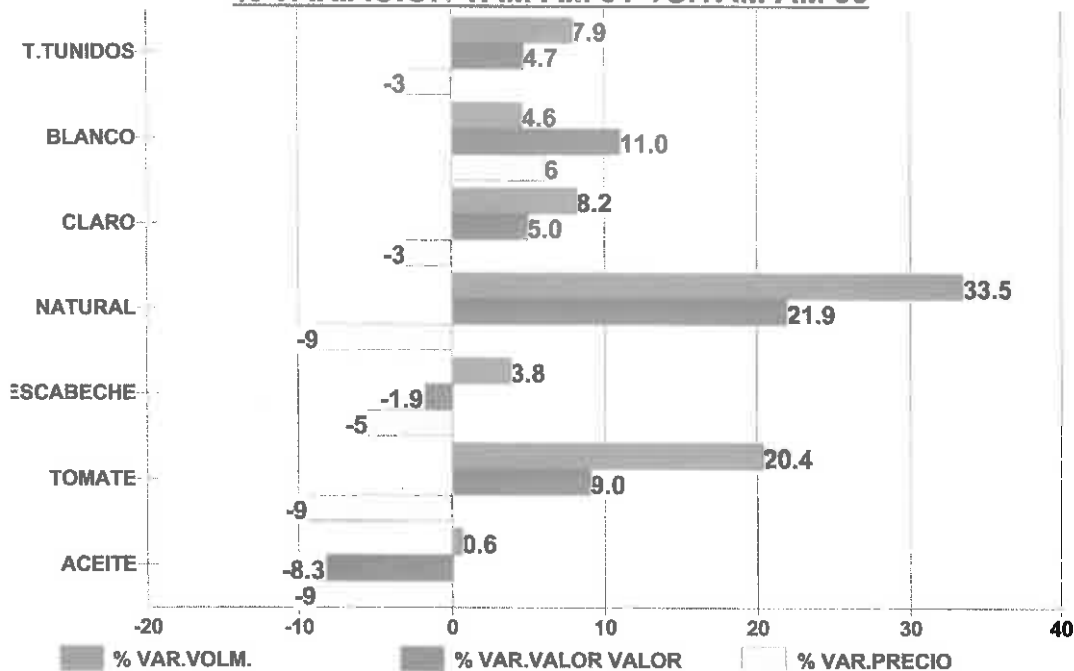
Los Factores.

◆ 4.1 El Producto: calidades y presentaciones

ESPAÑA ALIMENTACION VENTAS VOLUMEN (mill.latas) - PESO DE LOS SEGMENTOS: T.TUNIDOS -



ESPAÑA ALIMENTACION % VARIACION TAM AM'01 VS.TAM AM'00



El producto: Segmentado por especies, Blanco (Bonito), Claro (Yellowfin) y Atún (cualquier túnido).

El consumidor español quiere un producto en trozos compactos, sin migas, más salado que soso, y no le molesta algún punto oscuro.

Enlatado y multipacks. El "Best seller" es el RO-80x3.

El aceite es vegetal. El oliva está incrementando su participación pero no pasa del 6%.



◆ 4.2 El consumidor.

Está en el 100% de los hogares y la práctica totalidad de la hostelería. Su preocupación es el sabor, salud, precio y confianza (rol de la marca). Creciente interés por la calidad.

◆ 4.3 Los distribuidores.

La fuerte concentración provoca dos consecuencias notables.

- 1.- Incremento de la marca del distribuidor.
- 2.- Reducción del nº de marcas en los lineales. Consecuentemente, concentración en las marcas nacionales.

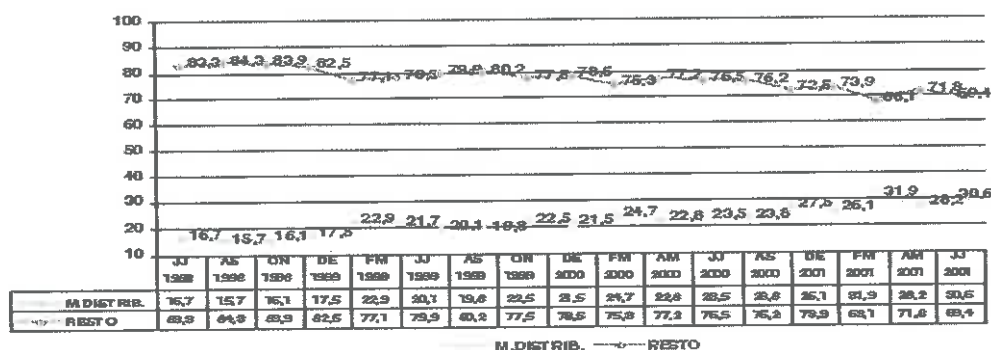
Las marcas del distribuidor, siguieron un proceso hasta llegar a ser hoy algo muy importante para su propietario, quien en general, trata de posicionarla en el segmento medio-alto.

TOTAL ESPAÑA (Incluido Canarias) : ATÚN CLARO EN ACEITE

EVOLUCION PARTICIPACION VOLUMEN

Marcas: M.Distribución, contra primeros fabricantes y resto.

Tres años de historia por periodos Bimestrales



Suelen ser contratos a medio-largo plazo. En algunos casos una subasta (incluso por internet) y en otros, basados en colaboración industrial con conocimiento del coste. En cualquier caso nadie acepta un precio que no le permita competir.

Los contratos a largo plazo han provocado situaciones curiosas, como pérdidas en dominó..., pero no han influido en los precios de materia prima.

◆ 4.4 Los fabricantes.

4.4.1 La Industria. El aumento de la competitividad de la industria española vino acompañada de un aumento del volumen en el consumo nacional y de las exportaciones, así como un incremento enorme de las inversiones. Estas recibieron, en gran medida, fuertes subvenciones de la U.E.

EXPORTACIONES ESPAÑOLAS DE CONSERVAS DE PISCADOS Y MARISCOS POR ESPECIES. 1999-2000

	VOLUMEN			VALOR			PRECIO MEDIO		
	99	00	%	99	00	%	99	00	%
Atún	1.124	1.141	+1.5%	1.280	1.317	+2.9%	1.139	1.154	+1.3%
Salmón	50.426	50.970	+1.1%	27.640	28.120	+1.8%	548	552	+0.7%
Caracoles	772	1.171	+52.0%	612	2.777	+354.4%	792	2.384	+201.4%
Conservas mixtas	10.114	11.824	+17.9%	5.148	20.510	+297.4%	505	1.734	+243.2%
Mercaderes	1.120	1.240	+10.7%	847	5.041	+494.4%	747	4.067	+441.2%
Mariscos variados	9.840	11.150	+13.3%	4.561	22.420	+394.4%	464	2.019	+333.2%
Conservas especiales	9.440	11.170	+18.3%	3.929	27.494	+600.9%	416	2.464	+492.3%
TOTAL	88.572	102.555	+15.7%	44.337	225.570	+507.4%	505	2.113	+318.4%

EXPORTACIONES ESPAÑOLAS DE LOMOS DE ATÚN. 1999-2000

	VOLUMEN			VALOR			PRECIO MEDIO		
	99	00	%	99	00	%	99	00	%
Lomos de atún	1.771	2.650	+49.6%	4.142	25.001	+504.4%	2.333	9.434	+304.2%
TOTAL	1.771	2.650	+49.6%	4.142	25.001	+504.4%	2.333	9.434	+304.2%

EXPORTACIONES ESPAÑOLAS DE SEMI-CONSERVAS DE ANCHAS. 1999-2000

	VOLUMEN			VALOR			PRECIO MEDIO		
	99	00	%	99	00	%	99	00	%
Anchovy en aceite	1.300	2.782	+114.0%	1.670	11.307	+575.2%	1.285	4.067	+215.2%
Anchovy en agua	1.040	1.404	+34.1%	1.316	13.919	+950.4%	1.265	9.914	+688.4%
TOTAL	2.340	4.186	+78.9%	2.986	25.226	+747.2%	1.275	7.000	+449.4%

EXPORTACIONES ESPAÑOLAS DE PREPARADOS Y CONSERVAS DE PISCADOS Y MARISCOS. 1999-2000

	VOLUMEN			VALOR			PRECIO MEDIO		
	99	00	%	99	00	%	99	00	%
TOTAL	17.151	17.150	-0.0%	10.543	10.543	0.0%	615	615	0.0%

La situación es hoy de un exceso de capacidad que provoca una sobre oferta con la consecuente caída de márgenes y devaluación de los activos industriales (no podrías venderlos al precio de compra, pues quién lo compre nuevo obtiene una subvención). En fin, una calamidad. Nuestro sector, hoy, tiene menos márgenes. Vale menos.

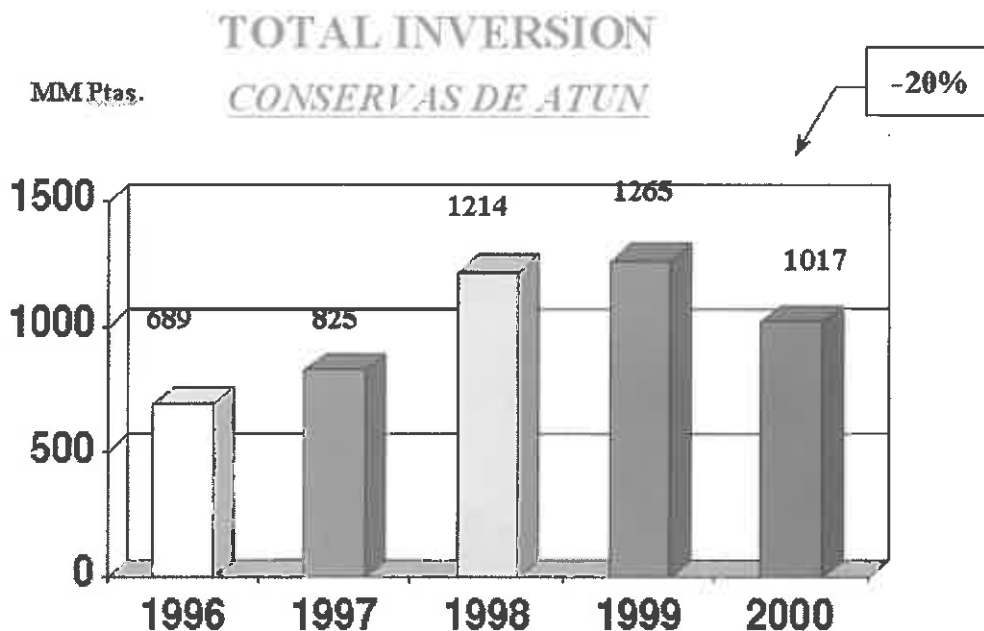
Curiosamente, sin embargo, la extrema presión competitiva no recortó los gastos en investigación. Algunas empresas nos hemos volcado con el fin de convertirnos en auténticas refinerías. Aprovechamiento de los líquidos de cocción, de los ojos del atún, la piel, las aletas, etc., así como en el desarrollo de nuevos productos, un trabajo bien realizado que encuentra gran dificultad en el mercado.

Otras características de la industria española, son su apuesta por la pesca, la deslocalización (producir fuera), la internacionalización (comprar marcas en el exterior), y las exportaciones.

4.4.2 Las marcas. El mercado español, está concentrado en torno a las marcas nacionales y las del distribuidor.

Pero quien gana cuota en España es la marca del distribuidor.

Con el enriquecimiento del país, los servicios (publicidad, gestión comercial, etc) son más caros. Se requiere un mayor volumen de ventas que los absorba. El estrechamiento de los márgenes fuerza a las marcas a cargar un porcentaje menor para su inversión publicitaria. De hecho, ésta ha disminuido el año pasado.

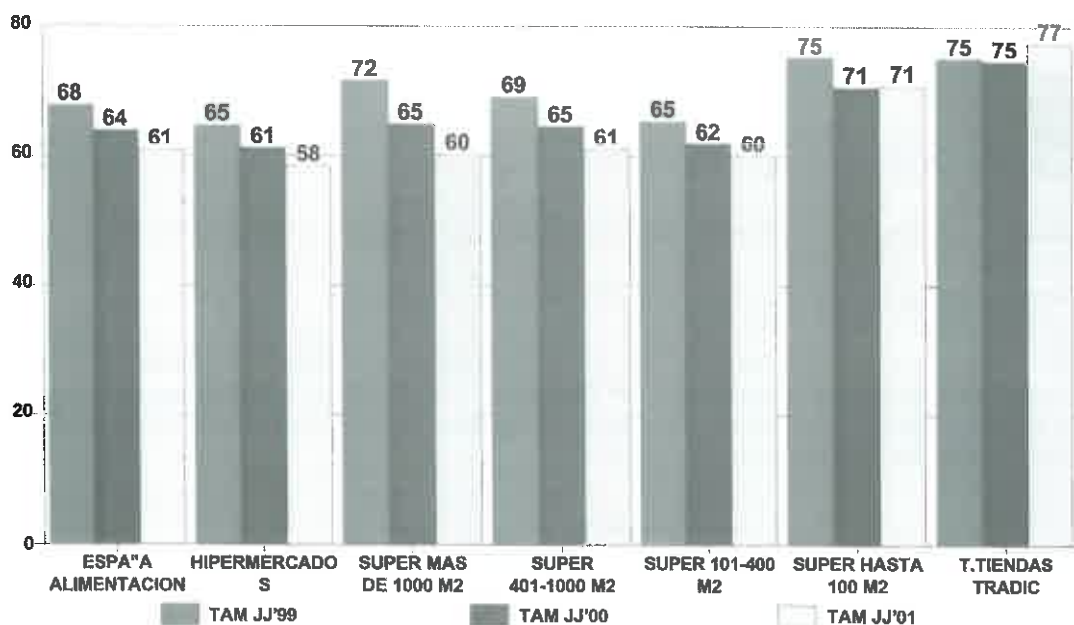


FUENTE: INFOADEX

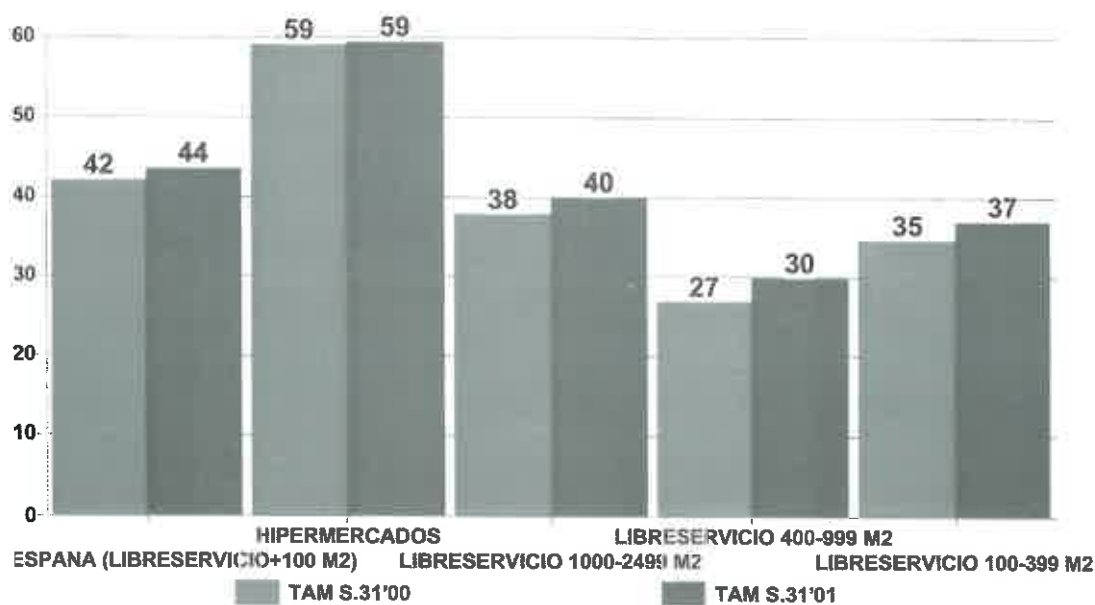
La debilidad de las marcas es patente y el resultado es la práctica desaparición de aquellas que estaban en el entorno del 5%. Las restantes debemos aportar un margen importante al distribuidor o desaparecer. Requieren más publicidad pero tienen menos margen...

La necesidad del margen exige un diferencial de PVP. Sólo podemos lograrlo teniendo la confianza del consumidor: haciendo un buen producto y diciéndolo. Marca
Pero eso requiere cada vez más presupuesto y los márgenes bajan...

**PRECIO PROMEDIO APERTURA FACIL REDONDO
ATUN CLARO EN ACEITE
POR CANALES DE DISTRIBUCION**



**TOTAL ATUN (Sin Canarias)
EVOLUCION % VENTAS TIENDAS PROMOCION UN.EQUIV.
(Datos Scanner)**



5. "Los Dineros"

Para evidenciar lo que estoy diciendo aporoto unos datos sobre el % de beneficio neto de los 12 mayores fabricantes españoles en los últimos tres años. Nos referimos ahora exclusivamente a los beneficios conserveros españoles, no de las otras actividades. Es evidente que dada la estructura de algún grupo, pueden estar mezcladas (pesca, empresas exteriores, electricidad...). Pero éstos, son los datos declarados, no consolidados.

% BENEFICIO NETO

(BENEFICIOS CONSERVEROS ESPAÑOLES)

		97	98	99
Beneficio Neto		2,07%	2,30%	2,17%
	Máximo	5,30%	4,50%	5,50%
	Mínimo	-1%	0,70%	0,20%
Rentabilidad sobre recursos propios		7,90%	10,10%	9,90%
	Máximo	15,58%	17,10%	20,40%
	Mínimo	-7%	3,40%	1,10%

La estrategia seguida por algunas empresas del sector ha sido, de hecho, diversificar. El éxito de ello dice mucho a favor de los ejecutivos, pero, no mejora los márgenes de las conservas en España. Los beneficios se obtienen en otra cosa, que además no necesitaría las conservas.

6. Modelo

◆ 6.1. Modelo de Empresa

No creo que exista un modelo exitoso. Las distintas compañías que formamos el sector hemos hecho cosas diversas: Apuestas por la especialidad, o la gama, el volumen y/o el margen, con y sin TV ... Los éxitos han sido de las empresas, no del modelo seguido. No contemplo como solución otros productos, otros mercados, otras actividades. Eso ya lo hacemos y está bien, pero el significado de esto, es que la solución es hacer otra cosa. Escapar. Y hoy hablamos de conservas de atún en España..

Creo que el problema es de sector. Que no lo puede resolver nadie individualmente. Por supuesto se pueden hacer cosas, y las estamos haciendo. Pero el problema persiste.

◆ 6.2. Modelo de Sector

Las conclusiones de mi exposición son obvias. Tenemos pocos proveedores y cada vez menos clientes. En cinco años habrá menos distribuidores que hoy. De eso estamos todos seguros. Como estamos casi seguros que, de no remediarlo, seremos tantos o más conserveros ...

Así las cosas, ¿quién le pone el cascabel al gato?.

PONENCIA / *SESSION*

8

ANÁLISIS DE LA SITUACIÓN DEL RECURSO Y DEL MERCADO DEL ATÚN A NIVEL MUNDIAL *ANALYSIS OF THE RAW MATERIAL SITUATION AND THE TUNA MARKET AT WORLD-WIDE LEVEL*

Mr. RENATO CURTO,
PRESIDENT TRI-MARINE INTERNATIONAL INC

Mr. JAMES JOSEPH,
DIRECTOR INTER-AMERICAN TROPICAL TUNA COMMISSION – CIAT

Mr. ADOLFO RIBEIRO LIMA,
SECRETARY GENERAL INTERNATIONAL COMMISSION FOR THE CONSERVATION OF ATLANTIC TUNA- ICCAT

MODERADOR:
D. VÍCTOR PITA RIVA,
GERENTE DE PITA HERMANOS, S.A.

THE TUNA SUPPLY CHAIN

MR. RENATO CURTO

CHAIRMAN TRI-MARINE INTERNATIONAL, INC. USA

Mr. Secretary General of Anfaco, Mr. Chairman, distinguished Ladies and Gentlemen, good afternoon.

Considering that we are almost at the end of two consecutive days of this very interesting 2nd European Tuna Conference, I will do my best to give you my presentation in a manner that will not have the effect of a sleeping pill. You have already heard or are about to hear everything you need to know about the technological innovations related to tuna fishing, processing and marketing, the effects of duty exemptions on the tuna market, the present and future outlook of the tuna raw material availability, the globalization of the tuna industry, the market situation in Europe and the USA, etc.... This is very good news: it means that I will not be bombarding you with too many statistics, graphs, and details. If you want numbers, you can find them in my technical paper that is included in your conference publication. Also, you can find it on my company's website.

I have a few simple messages to convey to you. The first, and I would like all of you to think about it, is that, regardless if you are friends or enemies, suppliers or customers, competitors or supporters, this industry needs a special and united effort from each and everyone of us in order to put it back on its feet, make it competitive with other food industries and allow every significant participant to it to make a decent living.

Tuna is good

We simply need to make sure that when we put it in a can or in a pouch, we do so in a manner that does not diminish its value or the perception of such value in the eye of the consumer. We need to allow the major brands to generate enough margins so that they can invest in advertising, research and product development. We need to promote the category as a whole.

Tuna supply is not necessarily in excess of world's demand

However, we need to make sure that our efforts in fishing and processing are better coordinated so as to avoid bottlenecks and excesses. We must become serious in establishing worldwide restrictions in the increase of fishing efforts. This can be done by limiting the entry of new vessels to the tuna fleet worldwide or by limiting the number of trips a vessels can make in defined period, or perhaps even a combination of the above. Fishing grounds are already restricted. Maybe there should be even more control.

Tuna is safe and healthy

That's a fact. We need to convey the proper messages to the consumers, to the environmental organizations, to the health authorities, to the media in general with joint and coordinated efforts. Tuna is not grown with hormones, it is not fed with antibiotics, it contains no chemicals or preservatives, it is

not processed with chemical agents, it is not genetically modified, and it has no communicable diseases. There is no "mad tuna syndrome". Scientific studies show that mercury in tuna is well below potentially dangerous levels, therefore not likely to harm anyone. You can all add to the list of good comments.

Tuna has great value

But we need to make sure that it does not become too cheap, as it will inevitably lose its perceived value in the eyes of the consumer. The Tuna Industry is very competitive. I am all for doing business more efficiently and reducing costs, but there is a limit. Nobody gains anything when the prices of tuna go below a certain level. Lower prices do not represent the solution. Rather than talking about low prices, we should talk about how we can make the industry more efficient, stable, and reducing duplication of efforts. We each have a role to play. I strongly believe that, in addition to discussing details, numbers, market data, we need to discuss principles and the roles each of us should play in order to make the industry stronger.

Evolution and Changing Roles

Tri-Marine's "limited" success is a direct result of providing necessary services to the industry. In the beginning our role was primarily that of a broker or trader. The biggest part of our business was sourcing round Yellowfin tuna primarily for the canneries in Italy. 10 years ago there were at least 10 significant tuna brands in Italy, each with its own cannery or canneries. Today, that market is much more concentrated with just a handful of brands holding 90% of the market. The majority of the fish is now imported, not in round form, but as either cooked and cleaned loins or already canned. The business of shipping round Yellowfin to Italy is almost extinct. This is one example of how the tuna industry has undergone dramatic change. It has "evolved" and with it, so has Tri-Marine.

While major tuna markets in Europe like Italy and France have reduced their need for round tuna, the demand for it in Spain has increased as it has become a major producer of cans and loins not only for domestic consumption, but especially for export. I am not sure how long Spain will be able to continue this trend, but I believe it is noteworthy to say that it has indeed become the strongest competitor of the Thai and Philippine packers, the traditional suppliers to the EU market.

Spain's growth as a supplier of loins and cans to the EU market means that they now need more than 300,000 tonnes of raw material annually. About half of this tonnage is supplied by the Spanish fleet, which is today the most modern and efficient in the world. Their vessels have moved from their traditional fishing grounds (Atlantic and Indian Ocean) to the Eastern Pacific and recently to the Western Pacific. The rest of the raw material, including loins, is imported, much of it from Latin America.

If we look briefly at the US market, we can easily see how things have changed in the last 20 years: the canneries and the fleets have left California. Now, they have almost completely (except for one) left Puerto Rico. Samoa is the largest supplier of U.S. branded products and, of course, Thai and Philippine packers continue to be important suppliers although now the US market is depending more and more on supply from Latin America.

We have seen countries like Mexico and Korea rapidly and efficiently develop their domestic markets, thus absorbing the majority of the production of their fleets. We admire the incredible growth of Ecuador as a fishing and producing nation, and, the growth of the Venezuelan and Colombian tuna industries and markets. These countries have combined the proximity of their healthy fishing grounds with their ability to expand their processing capacity.

These changes have had a major impact on the tuna industry and on our businesses. Fortunately, so far, we have all survived. But I am sure that there will be more change. We need to anticipate these changes, become part of them, and apply our expertise and resources to the benefit of our industry.

In this regard we should recognize that we are in an age of specialization and consolidation. Each and every one of us has a job to do. Vertical integration may not be the correct answer. Brands could become more efficient by simply concentrating on brand management. In theory, the brand owner could contract everything except for his core competency, which is brand management. Divestiture of non-core assets coupled with contracts for 'just in time' inventory takes a certain sophistication and trust. Recent innovations in information technology, for example the internet based virtual private networks, collaborative resource planning and replenishment software, supply chain management software, etc., give complete visibility of the supply chain to the brand manager. It absolutely requires highly confident and reliable strategic partnerships to make certain that marketing plans can be executed with perfection. It takes an almost perfect tuna supply chain.

The Tuna Supply Chain

As my good friend Mr. Edmund Gann says, "Everything starts with the raw material". From there, a very effective supply chain would contain the following elements:

- Good fishing vessels and crews
- Access to productive fishing grounds
- Limited entry to avoid market congestion
- Proximity of production capacity
- Cost effective and productive labor
- Socio-economic stability
- Port infrastructure and competitive transportation services
- Favorable duty in destination markets
- Information technology
- Financial resources

Therefore, it is important to first focus on access to productive fishing grounds. The fleet fishing these grounds must be efficient and capable of delivering good quality. This means excellent equipment and refrigeration, discipline to stay away from large sets, small fish, etc.

Economics argue for the direct deliveries of the fish to the plants thereby eliminating the need for transshipment and ocean freight. This also means that the fishing grounds cannot be too far from the plants least the fishing boats spend too much of their potential fishing time in transit. To be efficient the boats have to maximize their fishing days. Obviously, if you have access to productive fishing grounds that are close to the processing plant, you will be able to maximize fishing days while eliminating ocean freight expense deductions from your fish proceeds. These are the best possible operating assumptions for the boat owner.

As for the processing plants, proximity to productive fishing grounds will minimize the risk of raw material shortages and also provide opportunities for "below market" fish purchases. This occurs when boats will accept a discount in the prevailing price for a fast turnaround to allow them to return to the fishing grounds for a "quick trip".

However, plant location with respect to the fishing grounds is but one factor when considering criteria for tuna processing plants. The other important criteria are the relative cost of labor, the socioeconomic stability of the location and, sometimes most important, the cost of duty in the target market relative to competing sources of product.

Take the EU market for example. The cost of duty on frozen cooked tuna loins and canned tuna is 24%. However, if the product has qualifying origin and complies with various rules, the duty is zero. This is a major difference. Considering that labor is usually less than 10% of the cost in loins or cans, you can see that duty savings is much more important than labor cost.

The other thing to remember is that supply chain optimization must consider reliability. The lowest cost source will never be a significant part of a major brand's procurement strategy if there is a history of work stoppages and shipping schedule interruptions. Reliability is worth a lot. To be a major part of someone's supply chain, you have to be reliable.

Degree of reliability and relative cost also apply to logistics considerations, especially the transportation solution from the processing plant to the brand owner's distribution center. The cheapest and most stable source of finished product is worthless if it can't reach the market. This is especially relevant to prospective plants on remote islands with infrequent and expensive transportation service.

The fact that the very nature of our business depends on fishing should make us rather risk averse when it comes to supply chain planning. Logically, we will need more than one source to manage the risk of fishing and other factors beyond our control. The larger and more valuable our brand, the more important is our need to diversify the supply chain.

Of course, this is all theoretical. It may be impractical or otherwise impossible to diversify sources of supply. In the real world, requirements change. It is difficult to negotiate "requirements" contracts with suppliers. Plants need to operate at capacity for maximum economic efficiency. Enter the role of the spot market. Producers and users can enter into annual or even longer-term contracts for part of their business and leave the balance to the spot market.

We cannot expect the supply chain solution that is optimum today to remain so tomorrow. Some major factors can change quickly, e.g., duty and access. Others change more slowly. In any case we need to constantly review relative costs and reliability so as to continuously optimize our supply chains.

Now let's look at some real world examples of supply chains on a country basis.

By any measure, Spain is a leading tuna country. They have a significant domestic market and export a tremendous volume of canned tuna to their EU neighbors. Despite its significant size and importance, only a minor part of the tuna is actually landed directly by fishing boats in Spain. With the exception of Bonito del Norte catch and possibly some light meat from the Atlantic, the majority of all raw material for the Spanish tuna industry arrives by refrigerated container or carrier, most of it having been transshipped from Spanish or foreign flag purse seiners.

The very productive Spanish purse seiner fleets can be found in the Indian and Atlantic Oceans as well in the Eastern Tropical Pacific (ETP) and the Western Pacific. Some of this fish is transshipped by carriers back to Spain. Some is delivered to foreign canneries. The most interesting is the fish that is delivered to processing plants in EU duty-exempt, low labor cost countries for conversion into cooked loins and canned product. Conservas Garavilla's plants in Ecuador and Colombia and Calvo's pioneering efforts in Venezuela are noteworthy in this regard. As further evidence of the economic viability of this extension of Spain's tuna supply chain is news of the planned investment by the Albacora Group as well as additional important initiatives by Calvo, all in Central America.

The supply chain from Latin America to Spain emphasizes the following elements:

1. Access to productive fishing grounds
2. Plants with low cost labor
3. Duty-free access to the EU market
4. Cost effective transportation

Imports of Frozen Cooked Tuna Loins by Spain				
From	Ecuador	Colombia	Venezuela	Total
1997	9,890	435	334	10,659
1998	8,261	296	486	9,043
1999	12,219	2,509	2,946	17,674
2000	13,076	11,382	0	24,458

Source: Eurostat

Finally, note that the efficiency of the Spanish tuna industry, in conjunction with its location, makes Spain an important supplier of canned tuna and frozen cooked tuna loins for other major tuna markets in Europe. This is perfect for customers requiring Just in Time inventory replenishment. It is easy to understand how Spanish tuna exports jumped more than 37% in year 2000 compared to 1999 as reported by ANFACO.

2000 Exports by Spain (tonnes)			
To	Canned Tuna	Tuna Loins	Total
Italy	29,125	2,088	31,213
France	5,349	2,764	8,113
UK	1,910	58	1,968
Portugal	3,304	7	3,311
Total	39,688	4,917	44,605

Source: Eurostat

Unlike Spain, France imports relatively little frozen tuna or loins for processing in France. Rather, they import finished product, most of it from the controlled tuna factories in West Africa.

2000 Tuna Imports by France			
From	Canned Tuna	Tuna Loins	Total
Cote d'Ivoire	7,936	2,972	10,908
Spain	5,349	2,764	8,113
Ecuador	145	912	1,057
Kenya	0	984	984
Other	6,508	5,598	12,106
Total	19,905	13,230	33,168

Source: Eurostat

Comparative data show that the West African factories are losing share of the French requirement. Spain's volume to the French market increased 61% from the previous year. One would expect that Spain will continue to grow in importance as a source of tuna loins and finished product due to price competitiveness, and the convenience of intra-EU shipping and documentation.

The US tuna supply chain is complex and it is changing. About 50% of the U.S. market is supplied from American Samoa where the majority of the raw material is delivered directly by U.S. flag purse seiners. The labor in Samoa is relatively expensive compared to Thailand and the Philippines, but the canneries enjoy tremendous economies of scale and they are able to efficiently produce canned tuna that is duty-free for the U.S. market.

Puerto Rico had been an important part of the U.S. tuna supply chain but high labor costs in combination with higher light meat raw material costs resulted in the closing of all but one of the plants there.

Actually, from a supply chain perspective, the closing of the plants in Puerto Rico is more interesting when considering albacore than light meat. The duty savings from production in Puerto Rico are higher on albacore than light meat. And one could argue that the cost of Indian Ocean and South Atlantic albacore delivered by carrier to Puerto Rico is cheaper than the cost delivered by container to alternate ports. The industry is now waiting to see how the U.S. supply chain for canned albacore will look.

2000 Imports by U.S. (tonnes)				
From	Canned Tuna	Tuna Loins	Frozen Tuna	Total
Thailand	79,928	7,706	32	87,666
Philippines	35,251	628	1,386	37,265
Ecuador	2,378	31,855	2,351	36,584
Indonesia	13,391	184	1,247	14,822
Taiwan	13	-	28,493	28,506
Other	10,998	6,929 ¹	22,198	40,125
Total	141,959	47,302	55,707	244,968

¹ Includes Colombia 3,410 tonnes and Fiji 3,089 tonnes

Source: U.S. Department of Commerce; National Marine Fisheries Service

Loins play an important part of the US market for canned tuna. Bumble Bee's plant in California is the main user with controlled plants in Ecuador supplying most of the loins.

As you can see from the trade data, Mexico seems to be missing. Although the trade embargo on Mexican tuna has been lifted, the US brands and the majority of importers follow a policy of only purchasing from suppliers that are dolphin safe in accordance with the old definition (no intentional sets on dolphins, regardless of mortality or injury) Meanwhile, the North American Free Trade Agreement provides for progressive reduction and then elimination of the duty on canned tuna imported into the U.S. from Mexico. Should the dolphin issue be somehow resolved, we should expect to see Mexico becoming an important part of the U.S. tuna supply chain.

For purposes of discussion only, I am presenting what I believe to be representative costs of comparative supply chains. The intent is to show the trade-off between raw material, labor, and packaging, transportation costs for alternate sources of supply. First, we will look at the U.S. market.

Cost of Light Meat 170g x 48 Assuming \$800/tonne Bangkok Market			
Cost	Thailand	Samoa	Mexico
Fish @ 85 cases			
per tonne	9.40	8.80	8.80
Variable Cost	1.00	1.00	1.00
Packaging	3.20	3.30	3.30
Direct Labor	.50	2.00	1.00
Overhead	.50	.50	.50
Sub-total	14.60	15.10	14.60
Duty (Rate)	12.5%	0%	5.8%
Duty per Carton	1.82	None	.85
Shipping	.75	.65	.50
Total	\$17.17	\$16.25	\$15.95

I assume that Samoa and Mexico have a \$50/tonne advantage on the cost of raw material as both receive the majority of their fish by direct delivery. Labor in Bangkok is cheaper than both Mexico and Samoa. Samoa has a significant advantage with no duty. Once the duty on Mexican products is eliminated under NAFTA, Mexico should be the low cost producer of tuna for the U.S. market. This cost advantage, coupled with its geographic advantage and the possibility for Mexican trucks to be allowed to deliver the products directly to retailers, will make Mexico an excellent tuna supply chain partner for the U.S. market.

The next table looks at the European market for canned tuna based on two different sources of supply: Ecuador and the Philippines.

Cost of Light Meat 185g x 48 Assuming \$800/tonne Bangkok Market		
Cost	Philippines	Ecuador
Fish @ 75 cases		
per tonne	\$10.00	\$10.67
Variable Cost	1.00	1.00
Packaging	3.30	3.30
Direct Labor	.50	.50
Overhead	.50	.50
Sub-total	15.30	15.97
Duty (Rate)	24.0%	0%
Duty per Carton	3.67	None
Shipping	1.00	.75
Total	\$19.97	\$16.72

I am assuming that the cost of raw material in Ecuador is equivalent to Bangkok and that Philippine packers pay less (\$50/tonne) than the Bangkok market. Shipping is assumed to be more expensive to Europe from the Philippines than from Ecuador. The big cost difference, however, is in duty PROVIDED that the fish has qualifying origin. Without the duty advantage, supply from Ecuador would be more expensive than from the Philippines.

Market Evolution

Raw material, duty and labor cost considerations are shifting Europe's tuna supply chain away from the Philippines and Thailand to Spain and Latin America. And loins are playing a major part in this shift.

2000 Tuna Imports (tonnes)			
Country	Canned Tuna	Tuna Loins	Total
Italy	42,793	27,256	70,049
Germany	46,408	71	46,479
France	19,035	13,230	32,265
UK	28,189	146	28,335
Spain	1,612	19,334	20,946
Total	138,037	60,037	198,074

Source: Eurostat

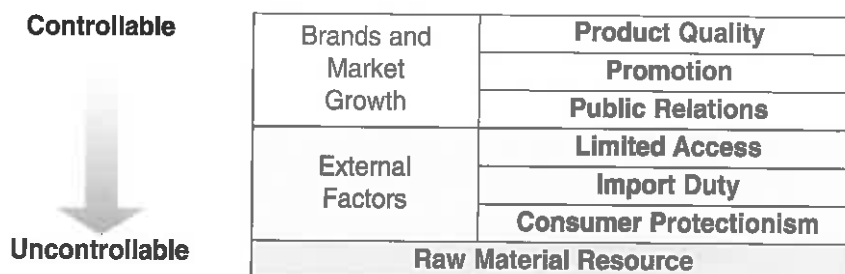
The traditional canned tuna producing countries of Italy, Spain and, to some extent, France have the cannery infrastructure to allow them to substitute or augment the importation of round fish with loins. The loin-sourcing objective then becomes one of identifying potential loin plants that have lower raw material, labor and other production costs than the importer.

The supply chain is improved if costs, including inventory, are lowered without compromising reliability and integrity.

The market can then be expected to evolve as follows:

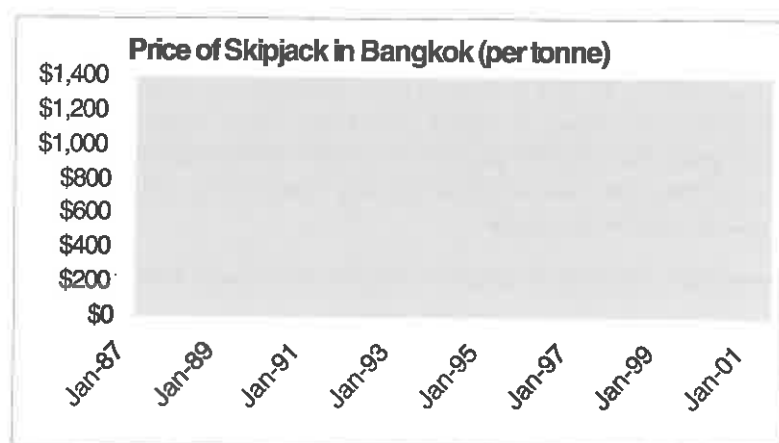
1. Domestic canning using local or imported catch
2. Importation of cooked loins for domestic canning
3. Importation of finished product

Economic factors will eventually drive the higher labor cost, mature canned tuna markets to import finished product from lower cost producers. The pace of this evolution, however, is unpredictable and even, in some cases, reversible. It depends on tuna market growth, raw material resources and external factors.



Some of the factors that influence changes to or the evolution of the market are controllable. Others are not. For example, I submit that market growth is somewhat controllable. Factors like raw material and duty regimes are less so. I am going to speak to these factors and make some suggestions as to how we should try to influence them for the benefit of the tuna industry.

First, raw material resources. I don't intend to address the state of the resource. I will leave that to Dr. James Joseph and his scientific colleagues. I can only tell you that an ever more efficient fleet, comprising larger and faster vessels, employing larger nets and the latest technology, is creating periods of over-supply (catching more fish than the market can absorb in the short term). We then find ourselves in a "lose-lose" situation. Prices for fish fall below break-even levels and all of the participants suffer: vessel owners, processors, Island governments, and all of their employees.



Source: Globefish

It is, in my view, absolutely essential that access is limited. Fortunately, I am a businessman and not a politician. Therefore, I can say that it is not my job to develop a system to limit entry. I do know that the Convention on the Conservation and Management of Highly Migratory Fish Stocks in the Western and Central Pacific Ocean (Western and Central Pacific Treaty) has been established to regulate and manage tuna in the Central and Western Pacific. In addition, there is IATTC with jurisdiction over tuna fishing in the Eastern Tropical Pacific, ICCAT over the Atlantic and IOTC over the Indian Ocean.

Of these, the Western and Central Pacific Treaty is the newest having only been adopted in September 2000. In fact, ratification has not yet been completed. However, the Western and Central Pacific produces 2/3's of the world's tuna supply and it is therefore critical that an effective means to manage the fishing effort there is urgently established. Until the Central and Western Pacific Treaty has been fully ratified, I suggest that the Forum Fisheries Agency registry is used in order to limit access.

Nationality	No. of Purse Seiners
Japan	35
Korea	29
Philippines	10
Taiwan	40
United States	50
Local including Foreign	41
Total	205

Limited access is one of three industry level issues that are difficult for us to try to control. However, the more we work together as an industry, the more effective will be our efforts. The other two industry level uncontrollable factors that have a profound impact on the evolution of the tuna market are Import Duty and Consumer Protectionism.

Like limited access, changing import duties is largely a political process. We need to understand how any change in the existing level of import duties on tuna products would affect our businesses. In the long run, I believe there should be no duty. Let Adam Smith's invisible hand determine the best supply chain for each market. We are wasting too many resources enforcing existing customs regulations. For example, the duty exemptions granted by the EU to several Latin American countries, have had a profound effect on the industry. Investments and choices of supply chains have been highly motivated by such duty exemptions. We should recognize the investments that have been made and the positive effects in the industrial development of the countries that have received the duty exemptions. Changes in the existing global duty regimes, if any, should be applied gradually.

The last external factor that influences the evolution of the tuna market is consumer protectionism.

There are a variety of issues facing the global tuna industry today that I group together under consumer protectionism. These include environmental matters, like the dolphin safe issue or by-catch, health issues, like mercury, product standards of identity, and conservationism in general. Any one of these issues has the potential to bring negative publicity to the category and therefore reduce consumption at the consumer level. It is our job as an industry to shape public opinion in a way that is favorable to us. To do that, we need to be organized and proactive.

Some of these issues are trans-national like the dolphin and by-catch issues. Others are more national market centric, at least for the time being, like mercury issue in the U.S. I believe that there are enough industry level organizations, both international and national, to deal with these issues. I will not be so naïf as to suggest strategies for resolving contentious issues like dolphin safety. However, if we can't establish consensus as an industry, how can we expect to be successful against those who oppose us?

Finally, I come to that part of market evolution over which we have the most control: market growth. I say this because I am convinced that indeed we can strongly influence market growth IF we pay attention to three things: product quality, brand promotion and public relations.

Basically, these factors relate to brand management. We cannot expect the market to grow if we don't offer the market good quality product. Personally, I think that the canned product being sold in the U.S. is not good enough. No wonder the category is doing so poorly.

If the product quality is good, it makes sense to advertise and promote it. The brands need to invest in promoting their tuna products.

Finally, the brands need to get together and do a better job of public relations. The public needs to know that tuna is a healthy product. It is completely safe. A few years ago the U.S. Tuna Foundation received a proposal from a large public relations firm to promote public awareness of tuna as a great source of nutrition. It was a wonderful campaign but the U.S. brands decided against it. Why? It was too expensive. The reason was that there was not enough money in the category to justify spending money on public awareness.

This is true. There isn't any money in the category. Both the Brands and Private Labels sell canned tuna in the United States too cheaply. Recent market studies show that canned tuna is still the number one seafood consumed in the US with 3.6 lbs per person in the year 2000 versus 3.5 lbs the year before marking the fourth consecutive year of growth. I say raise the bar. Make a better product, advertise and support it. I believe the consumer will pay a higher price for a better product, and the entire category will be raised up both in terms of value and image.

In summary, the tuna market continues to evolve in reaction to a number of factors, some controllable, some not. As the market evolves, so do the supply chains that bring tuna products to the consumer. Readily available information about relative costs and risks of supply chain alternatives allow the major brands to optimize their sources of supply. The competitive advantages of collaboration with supply chain partners outweigh the past practice of complete vertical integration. Potentially, the brands can completely outsource their requirements for finished product, including logistics, so that they can concentrate on brand management issues.

Thank you Mr. Chairman

A GLOBAL VIEW OF TUNA FISHERIES

MR. JAMES JOSEPH,

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INTRODUCTION

There are about 90 million tons of fish and shellfish harvested annually from the world's oceans. Slightly more than 4% of that is tuna. Although tuna does not represent a large portion of the total fish harvested from the sea, it does represent a significant portion of the total value of all fish landed. This obviously is because tuna is a tasty and nutritious food and most of the time is in high demand. Tuna was not the first fish to be canned, but in many parts of the world it is the most popular form of canned fish sold. In fact nearly 60% of all tuna landed is destined for the can and most of that is currently consumed in North America and Western Europe with growing markets in many other areas, particularly in Latin America and Asia. The remaining 40% is consumed in a variety of forms, either as *sashimi*, processed as *katsubushi*, or as grill-grade. Fresh or fresh-frozen tuna steaks are on the menu of most moderate and up-scale restaurants in North America and Western Europe. Fishermen of more than 85 nations currently harvest tuna from the world's oceans. The livelihood of many people depend on the capture, processing, and sale of tuna, but many, many, more consume tuna on a regular basis. The demand for tuna is almost certainly going to increase over the long term, particularly if the quality of the canned product is kept at a high level. Increasingly more people will come to depend on tuna as a source of their livelihood. A responsibility of governments is to insure that the tuna resources are managed in a sound and rational manner so as to insure their survival and continued ability to provide wealth and sustenance in the future. It is the responsibility of industry to work with governments to achieve these ends.

The objective of this paper is to review the fisheries for the principal market species of tuna, skipjack (*Katsuwonus pelamis*), yellowfin (*Thunnus albacares*), bigeye (*Thunnus obesus*), albacore (*Thunnus alalunga*) and bluefin (*Thunnus thynnus* and *T. maccoyii*), and the impact that fishing has had on the status of the tuna stocks. Important issues related to the proper conservation and management of the species will be discussed along with current institutional arrangements for achieving these objectives. Estimates are given of the growing number of vessels in the world fleet of high seas tuna purse-seiner vessels. This is followed by a discussion of whether there is a need to limit the number of these vessels in the future, and if so, the problems associated with how this can be achieved.

CATCH TRENDS The world catch of tuna increased from about 1 million tons in the 1960s to about 3 million tons in 1990 (Figure 1). The catch for most of the individual species also increased (Figure 2). However there were periods of slow growth that alternated with periods of fast growth. From 1991 through 1996 catches stayed relatively steady, between about 3.1 and 3.2 million metric tons. In 1997 the catch reached 3.4 million tons, and it continued to increase through 1999, when it reached nearly 3.9 million tons; it decreased slightly in 2000.

The large increases in the 1970-1978 period were the result of expansion of the fisheries in the eastern Atlantic and the development of new offshore fishing areas in the eastern Pacific. Subsequently, after six years of little increase in world production, many vessels transferred to the wes-

tern Pacific and western Indian Ocean, where they developed new fishing grounds. The catches during this period, 1984 to 1990 showed the greatest rate of growth seen in the fishery in many decades. No new major fishing grounds have been developed since 1990, and from then until 1997 the fishery showed almost no growth. From 1997 through 1999 the catch increased by about 19 percent, due in a large way to the high apparent abundance of skipjack and to the improvement and increased use of fish aggregating-devices (FADs).

Catches by Ocean

The annual catches of the principal market species, by ocean, during 1970-2000 are shown in Figure 1. The Pacific Ocean currently produces just under 2.5 million tons, or 64% of all the world's annual tuna catch and, with the exception of bluefin, also produces the greatest quantities of each of the principal market species (Figures 3, 4, 5, and 6). Of this 2.5 million tons, about 65% is taken by purse-seine vessels, slightly less than 14% by pole-and-line vessels, slightly more than 10% by longline vessels, and the remainder by miscellaneous other gears. The fishery in the western Pacific, west of 150°W, accounts for the large majority of these 2.5 million tons. The west-central tropical Pacific, the area of competence of the Secretariat of the Pacific Community (SPC), formerly the South Pacific Commission, has produced more than one million tons, or about 30% of world production, during the last few years; of this, nearly 800 thousand tons, or about 24% of the world total, is caught by the purse-seine fishery, the single largest tuna fishery in the world. The Japanese home island tuna fishery, which operates within a few hundred miles of Japan, also produces large quantities of fish. In recent years the combined catches of the principal market species in the Japanese home island fishery have fluctuated between 150 and 300 thousand tons, while the catches around the Philippines and Indonesia are not too far behind those of Japan.

Prior to the 1980s, the Indian Ocean accounted for less than 8% of world production of tuna. Most of the catch came from artisanal fisheries in Sri Lanka and the Maldives, augmented by distant-water longline fleets. In the early 1980s French and Spanish purse-seine vessels, faced by poor catch rates and problems of access in the Atlantic Ocean, moved to the western Indian Ocean, and as they expanded their operations there, catches of skipjack and yellowfin increased rapidly. Over the last several years the catches of tuna from the Indian Ocean have averaged about 20% of the world total. Following this rapid increase in the catch, annual production stayed around 700 thousand tons until 1999, when it increased to nearly 900 thousand tons (Figure 1). The catch in 2000 was only slightly behind that of 1999. More than 75% of this is caught in the western Indian Ocean by purse-seine vessels and by the fisheries of the Maldives and Sri Lanka. Two species, skipjack and yellowfin, account for about 80% of the total catch from the Indian Ocean.

Although artisanal and small-scale fisheries for tunas have existed in the Atlantic Ocean for many centuries (significant trap fisheries have existed in the Mediterranean Sea since the 12th Century), large-scale commercial exploitation of tunas in that ocean did not begin until the 1950s. Tunas were caught mainly with pole-and-line and longline gears until purse seining was introduced in the early 1960s. Catches increased slowly until the early 1980s, when they started to decline because of the shift of fishing fleets to the Indian Ocean. They were stable for several years, and then began to increase again, peaking in the early 1990s. Since then they have been relatively stable at slightly more than 500 thousand tons per year (Figure 1). The Atlantic Ocean currently accounts for about 14% of the world production of tuna. The principal species caught in the Atlantic, in terms of quantities landed, are skipjack and yellowfin, with nearly 80% of the landings coming from the eastern Atlantic. Most of this catch is made by large purse-seine vessels, which also catch bigeye.

Catches by Species

Skipjack

During the last several years, skipjack tuna has accounted for about 50 percent of the total world catch of the principal market species of tuna (Figure 2). It is widely distributed inhabiting the upper mixed layer of the ocean, and is caught mostly with purse seines and pole-and-line gear. Most of the catch is used for canning. Skipjack is a short-lived species, with high rates of natural mortality and population turnover. These characteristics of skipjack, together with their wide distribution, results in a very large biomass of fish, and very high levels of potential production. Ever since the beginning of heavy commercial exploitation in the early 1970s, the consensus among scientists had been that the populations of skipjack in all oceans of the world were lightly exploited and capable of sustaining much higher catches. This has been borne out by the fact that annual catches increased from about 400 thousand tons in 1970 to around 1.9 million tons in 1998. They remained near that level in 1999 and 2000.

In the Pacific Ocean skipjack is the dominant species in the catch in terms of weight (Figure 3). The Pacific-wide catch increased from slightly more than 200 thousand tons in 1970 to highs of about 1.4 million tons in 1998, 1999 and 2000. Of the 1.4 million tons, about 1.2 million tons was taken from the western Pacific. Studies based on tagging experiments conducted by the SPC suggest the stock of skipjack in the western Pacific is under exploited and that it may be possible to increase catches significantly over levels experienced during 1991-1997, perhaps by as much as 200 to 300 thousand tons per year. Such increases would, of course, depend on demand for raw material, price, the ability of the fishermen to locate additional fishing areas, and the vulnerability to capture of the fish in these new areas. The 1998, 1999 and 2000 catches did surpass the previous high catch level of 1991, but only slightly. However, if the estimates from the tagging experiments are correct, additional increases in skipjack catch could be sustainable. Prior to 1999 catches of skipjack from the eastern Pacific ranged between about 40 and 160 thousand tons, with a peak of about 170 thousand tons, taken during the late 1970s. During the last few years catches have reached record highs: 262 and 208 thousand tons during 1999 and 2000 respectively. It is likely that catches of skipjack could be sustained, on the average, at higher levels than those of the 1970s. However, because of the variability of skipjack abundance, catches as great as those of 1998 and 1999 could not be expected every year. Much of this increased catch in recent years has been taken by purse-seine vessels fishing on FADs, a method which normally catches a very high proportion of small fish. There is concern that increasing fishing effort on FADs in the eastern Pacific, and elsewhere, in order to increase the skipjack catch, could result in increased catches of small yellowfin and bigeye, which might affect the abundance and future catches of these species.

In the Indian Ocean catches have also shown a steady increase since the entry of purse-seine vessels from other areas (mostly from France and Spain) into the fishery during the early 1980s (Figure 4). The 1999 catch reached an all-time high of nearly 390 thousand tons. The Indian Ocean is the only ocean in which skipjack has not regularly formed the greatest proportion of the tonnage landed (Figure 5). Since 1990 the annual average landings of yellowfin and skipjack have been about the same, about 265 thousand tons each, with the exception of 1999 and 2000 when the skipjack catch substantially exceeded that of yellowfin. Skipjack in the Indian Ocean are considered to comprise a single stock, so that any management and conservation measures enacted would have to apply over the entire ocean. Although studies of the stock do not show clear evidence that it is fully exploited, scientists have expressed some concern about the possibility of increased fishing levels adversely affecting stock abundance. Nevertheless catches have shown a steady annual increase since 1983, reaching a peak of about 390 thousand tons in 1999.

In terms of weight of fish caught, skipjack is the most important tuna species in the Atlantic; in both 1999 and 2000, about 165 thousand tons were landed. This is somewhat more than the average for the previous few years, but below the record landings of about 200 thousand tons in 1991 (Figure 5). About 85% of the catch is taken in the eastern Atlantic, and the rest is taken primarily off Brazil.

Scientists have treated skipjack in the eastern and western Atlantic as separate stocks. Recent analysis by scientists working with the International Commission for the Conservation of Atlantic Tunas (ICCAT), shows decreasing average size and declining catch rates for skipjack of the central area of the eastern Atlantic fishery, where more than one-half the Atlantic catch is taken. These scientists considered that, in spite of the high turnover rates of the Atlantic skipjack population and the fact that nominal fishing effort for this species has been declining in recent years, over-exploitation of skipjack in some areas of the fishery is occurring and fishing mortality may exceed levels that would maximize the yield per recruit (Even though the nominal fishing effort has declined, the fishing mortality may be increasing, because of increased fishing power of the vessels). Since 1990 the use of FADs has increased greatly. This has most likely led to an increase in the catch of unmarketable skipjack that are discarded at sea dead, so the total catch may be underestimated. For all these reasons, any increase in the fishing mortality of Atlantic skipjack, particularly in the eastern area, should be carefully monitored.

Yellowfin

The second most important species of tuna in terms of weight of catch is yellowfin, which accounts for about 30% of the world catch (Figure 2). This species, like skipjack, is widely distributed, but is confined to slightly more tropical latitudes. Yellowfin live longer and reach larger sizes than skipjack. Most of the commercial catch is used for canning, and fish over 10 kg are considered prime raw material for this purpose. Like skipjack, much of the yellowfin is taken at the surface by purse-seine vessels but, unlike skipjack, significant catches, particularly of large fish, are made in subsurface waters by longline vessels. From the early 1970s until about 1984 world catches of yellowfin increased only slightly, but in 1985, with the development of new fishing grounds in the western Pacific and western Indian Oceans, the catch increased sharply. This increasing trend continued through 1993, but since then catches have shown no upward trend.

The majority of the approximately 750 thousand tons of yellowfin taken annually in the Pacific is caught by purse-seine vessels, which fish in much of the western Pacific as far to the east as about 170°W, and in the eastern Pacific from the coastline of the Americas to about 150°W.

In the western Pacific, yellowfin catches averaged slightly over 200 thousand tons per year prior to the late 1970s. With the arrival of the distant-water purse-seine fleets in the area after 1980, catches increased rapidly, and during the last several years have averaged about 450 thousand tons per year. Although the results of mark-and-recapture experiments conducted by the SPC suggest that exploitation rates on yellowfin are low, indicating that the western Pacific stock can sustain increased yields, any expectations of increased yellowfin production should be viewed with caution, as the longline catches and catch rates have declined and catches of small yellowfin appear to be increasing.

In the eastern Pacific, catches of yellowfin have averaged about 250 thousand tons over the last decade. Analyses by scientists of the Inter-American Tropical Tuna Commission indicate that the yellowfin resource in this area is fully exploited and is producing near the maximum it can sustain, so increasing fishing effort will not result in a sustained increase in catches. The IATTC has adopted catch quotas and closed areas for yellowfin in the eastern Pacific during recent years. Scientific analyses have also shown that if the fishing effort currently directed at large yellowfin associated with dolphins were to be redirected to fishing on floating objects, particularly FADs, in an effort to minimize the mortality of dolphins in the fishery, the catch of yellowfin would decrease. This decrease would result from a reduction in the yield per recruit, because large yellowfin are taken in association with dolphins, while fishing with FADs takes mainly smaller fish.

Catches of yellowfin in the Indian Ocean increased rapidly after the arrival of the French and Spanish purse-seine fleets. They hit a peak of 330 thousand tons in 1993, but since then have remained slightly below that level (Figure 4). Although the scientific evidence is not incontrovertible, it seems

likely, based on production models, that the stock in the western Indian Ocean is fully exploited, or perhaps overexploited. Scientists have urged caution regarding expansion of fishing effort in the surface fisheries of the western Indian Ocean, and have expressed concern over the fact that the increased use of FADs has increased the catch of small yellowfin, which could be reducing the yield per recruit, and hence the total potential yield.

About 60% of the commercially-caught yellowfin in the Atlantic are taken by purse seiners, but significant catches are also made by baitboats and longliners. Fish between about 40 and 170 cm in length are retained, but smaller yellowfin, of low commercial value, are often discarded. With the increased use of FADs the proportion of small yellowfin in the catch has increased. In the late 1960s catches of yellowfin increased as fleets of purse seine vessels increased their activities in the eastern Atlantic. Catches rose steadily until about 1984, but declined thereafter for a few years due to vessels moving to the Indian Ocean (Figure 5). After 1989, effort in the Atlantic increased again. The peak catch of yellowfin, about 185 thousand tons, was taken during 1990, but since then catches have been decreasing. The 2000 catch was about 140 thousand tons. Most of the catch is taken in the eastern Atlantic, with about 20 to 30 thousand tons coming from the western Atlantic.

Analysis for the yellowfin population completed by scientists of ICCAT's Standing Committee on Research and Statistics (SCRS), suggests that the stock is capable of supporting yields of about 150 thousand tons on a sustained basis. Since catches had been near that level in recent years, it was concluded that the population was fully exploited, and that any increase in fishing mortality would lead to overfishing and reduced catches. The scientists also cautioned that if fishing effort was being underestimated because of undetected changes in efficiency, the stock was probably being over-exploited. They also noted that if catches of small fish increased, then the potential yield would probably decrease due to a reduction in the yield per recruit. In 1973, ICCAT instituted controls on the catch of yellowfin of less than 3.2 kg, but these have been ineffective in keeping catches of these small fish down; in fact, they have been increasing. However, action was taken by ICCAT to close certain areas of the Atlantic to fishing on floating objects for the period November to January, in an effort to protect small fish. Further recommendations have been made to set limits on the catch of yellowfin.

Bigeye

Yellowfin and bigeye tuna are very similar in appearance, and the two species are often confused by fishermen and processors. Bigeye are distributed throughout most of the world's oceans, but they occur mostly in waters below the thermocline. In the mid-1970s, with the introduction of deep longlines, world catches of bigeye began to increase, reaching about 250 thousand tons by the mid-1980s (Figure 2), and remained at about that level until the early 1990s, when purse-seine vessels began to utilize FADs for capturing small bigeye for canning. By 2000 the overall catch of bigeye reached about 475 thousand tons, with a significant portion of this increased catch being attributable to the use of FADs.

Annual catches of bigeye fluctuated between about 100 and 165 thousand tons in the Pacific Ocean prior to 1999. During 1999 and 2000 catches were 173 and 208 thousand tons respectively (Figure 3) with about 50% of this taken in the eastern Pacific (east of 150°W). With the exception of an increase during 1999, there has been no observable trend in bigeye production in either the eastern or western Pacific, but the size composition of the catch has changed greatly in recent years.

Until recently longline gear was the principal method of capturing bigeye. However, during the late 1980s new methods were developed for capturing bigeye with purse-seine nets, which involve using FADs, sophisticated sonar, and deeper nets: the fish are attracted to the FADs, identified at depth by the sonar, encircled with the nets, and captured. The bigeye caught with this method are generally small (surprisingly, during 2000 purse seiners in the EPO captured large bigeye), averaging about 8 kg, whereas the average for the longline fishery is about 55 to 60 kg.

With this new method, annual purse-seine catches of bigeye in the eastern Pacific have increased from about 2 thousand tons in the late 1980s to a high of about 70 thousand tons in 2000. These increasing surface catches of bigeye contributed to the decline in longline catches (heavy exploitation by longline gear also contributed to this decline), which went from an average of about 90 thousand tons during the 1980s to less than 35 thousand tons in recent years. Moreover, the total catch data tell only part of the story: since the market value of large longline-caught bigeye is far greater than that of the small bigeye caught with purse seines, the economic effect is enormous. Studies indicate that if purse-seine catches continue at current levels, longline catches will decrease even further. These studies also suggest that, depending on the natural mortality rate of bigeye, total production from the two methods of fishing could very well decline after an initial increase. The same patterns of fishing seem to be prevailing in the western Pacific as well.

This situation regarding bigeye led the IATTC to adopt conservation measures designed to restrict fishing on floating objects of all types, including FADs during part of the fishing year. These measures are designed to limit the catch of small bigeye, because almost all the surface catch of that species is caught on floating objects, but it will also affect the catch of skipjack and small yellowfin. Such conservation measures have been implemented since 1999.

It seems clear that in both the eastern and western Pacific there is a need to view developments in the fisheries with caution. In both areas longline catches appear to be declining, and will probably continue to do so as long as surface catches continue at current levels. There is some evidence that the combined catches of longline and purse-seine vessels in the Pacific Ocean may not be sustainable.

Longline vessels were responsible for nearly all the catch of bigeye tuna in the Indian Ocean prior to 1985. After 1985 surface vessels began to catch more bigeye and longline catches leveled off at between about 40 and 60 thousand tons per year while surface catches increased, reaching more than 30 thousand tons by 1997. The status of the bigeye stock in the Indian Ocean is unclear. The relationship among bigeye from different parts of the Indian Ocean is unknown, so for the purposes of stock analysis scientists have assumed that there is a single stock. The most current stock analysis for bigeye in the Indian Ocean has concentrated on fitting the production model to historical catch and effort data. The conclusions vary, depending on the form of the model used and the data series applied, but the average maximum sustainable yield (AMSY) was estimated by one model to be between about 32 and 45 thousand tons and by another to be between about 52 and 60 thousand tons. Since catches have been well over 50 thousand tons for many years, and during the last three years have averaged about 100 thousand tons (Figure 4), the lower estimates seem unrealistic. If the higher estimates are correct, then the fishery is currently harvesting bigeye in excess of the AMSY; however, because of the increasing use of FADs in the surface fishery, and the consequent increase in catches of small bigeye, these estimates are also probably unreliable. Given the similarity of the situation in the Indian Ocean to that in the Pacific, and the results of the stock assessment studies for the latter area, any increases in the surface catch of small bigeye in the Indian Ocean should be viewed with caution, as they will almost certainly reduce longline catches, and could result in a decrease in the total catch. As is the case in other oceans, consideration is being given to limiting the use of FADs in the Indian Ocean by setting season and area closures.

Prior to 1970, most bigeye tuna taken commercially in the Atlantic Ocean were caught by longline or pole-and-line vessels, but since then the use of purse seines has increased, and by 1993 nearly 30% of the catch of bigeye was taken with this gear. Total catches rose steadily from 1950 to 1985, when they peaked at about 75 thousand tons, remaining there until 1990 (Figure 5). Since 1992 catches increased, averaging about 120 thousand tons annually. The increases since 1990 have been due to greater longline fishing effort and increased use of FADs by purse-seine vessels, the latter resulting in increased catches of small fish.

Estimates made by SCRS of AMSY obtained from production models indicate that under optimum conditions the population of bigeye in the Atlantic can sustain catches of between 80 and 95 thousand tons per year. These analyses indicate that the bigeye stock in the Atlantic is over-exploited, and that at current levels of fishing effort catch levels will decline in the future (ICCAT, 1999). Age-structured models generally corroborate the results of the production models, and indicate that if the fishery on FADs continues to catch large quantities of small fish, the result will be growth overfishing and a decrease in catches. If catches of small fish could be reduced, the total catch would increase. In this regard, ICCAT instituted a minimum size limit of 3.2 kg for bigeye a number of years ago, but it has not been effective, since in recent years about 55% of the bigeye captured in the Atlantic have been below that size. According to SCRS scientists, strict enforcement of the minimum size limit would lead to a 35% increase in the yield-per-recruit, and they have called for a catch limit less than the estimated AMSY and for limitations on fishing for bigeye with FADs.

This concern over the heavy exploitation of small bigeye (and skipjack and yellowfin, as well) in the FAD fishery is not limited to scientists: French and Spanish vessel owners voluntarily imposed their own restrictions on the use of FADs in the eastern Atlantic. Since this initiative by the industry, the governments have also taken action to limit catches by restricting fishing with floating objects during a three-month period and prohibiting the use of tender vessels, which maintain, repair, and replace the FADs, as necessary. Governments have also taken action to limit the entry of vessels greater than 24 meters in overall length into the fishery for bigeye.

Albacore

Albacore has the distinction of being the tuna that lead to the development of the present-day world market for canned tuna. . Because of the high demand for its white flesh, and the fact that supplies of raw material are limited, having never exceeding 260, 000 tons in any year, canned albacore has always fetched a premium price. Albacore is a temperate species, concentrated mainly in the cooler temperate and subtropical waters of the world's oceans, but undertake extensive migrations, seeking optimum conditions for feeding and reproduction. Surface fishing with hooks and lines in temperate and subtropical regions accounts for most of the catch of younger fish, while longline fisheries in more tropical waters capture the older fish. Purse-seining accounts for only a very small portion of the total albacore catch. Because of the wide distribution and highly-migratory characteristics of this species, levels of catch vary a great deal from year to year: annual catches have ranged from 170 and 255 thousand tons over the last 25 years, with an average of about 200 thousand tons (Figure 2). Catches show no trends, up or down, but both 1999 and 2000 showed increased catches in all oceans.

There is a northern stock of albacore that occurs in the Pacific between the equator and about 40°N, from Japan to North America, and a southern stock that is found between 15° and 40°S, from off Chile to around New Zealand. Total catches for these two stocks have fluctuated between 90 and 150 thousand tons during the last 20 years, with no visible upward or downward trend (Figure 3). On average, about 60% of the catch comes from the northern stock. Most of the albacore harvested commercially in the Pacific Ocean are captured by surface trolling gear and by longlines.

Scientists have reported that the northern stock was possibly overexploited during the mid 1980s but, due to natural fluctuations in abundance, it is currently above the level of abundance necessary to sustain the average maximum sustainable yield (ASMY). Based on past experience, it does not seem likely that there will be sustained increases in catch, but rather that environmental variability will play an important role in future production.

Firm conclusions regarding the status of the southern stock are difficult. On the one hand, studies based on tagging data and age-structured models suggest low exploitation rates, whereas production models suggest that the stock is fully exploited and incapable of sustaining increased catches.

The former studies are considered more reliable, so it is probable that the stock is not overexploited.

In general, it appears that catches of albacore from the Pacific Ocean will continue to show a great deal of variability in the future.

Catches of albacore from the Indian Ocean averaged around 15 thousand tons from 1970 to 1985 (Figure 4). With the introduction of large pelagic gillnets in 1985 catches increased to nearly 30 thousand tons, where they remained until this form of fishing was banned on the high seas in the early 1990s. Catches subsequently declined to as low as 17 thousand tons, but increased in 1999 to about 40 thousand tons. Scientific studies of the effect of fishing on the albacore of this region have been very limited, and it is uncertain whether the stock is fully exploited at recent levels of fishing effort, or whether increasing effort will result in sustained increased catches.

Catches of albacore from the Atlantic show no trends, varying between about 60 and 80 thousand tons per year over the last three decades (Figure 5). The information available is limited, but the population is considered to consist of three independent stocks, one in the North Atlantic, one in the South Atlantic, and one in the Mediterranean Sea.

In the North Atlantic most of the longline catch is taken in the central-western region, while much of the surface catch occurs around the Bay of Biscay. Overall catches have generally been declining since the early 1950s, when they were about 65 thousand tons per year, due mostly to decreases in longline and trolling effort, although pole-and-line and gillnet effort has been increasing. Recent catches from this northern stock have varied between about 30 and 40 thousand tons per year. Although reliable estimates of potential sustainable yields are not available, it is generally considered that the northern stock is probably fully exploited, and that increased fishing effort would not result in sustained increased catches. Concern has also been expressed over the observed declines in the biomass of spawning fish, thought to be at about 16 to 20% of its pre-exploitation level. These concerns have led to the conclusion by scientists working cooperatively under the auspices of ICCAT that the fishing mortality of the northern stock needs to be limited to current levels. Based on this scientific advice, the member governments of ICCAT have agreed to limit the number of vessels fishing northern albacore to 1993/1995 levels.

The southern stock of albacore is harvested mostly off West Africa by longline and pole-and-line vessels. The stock was first exploited on a commercial scale during the early 1950s; catches had risen to about 30 thousand tons per year by 1985, and generally remained somewhat above that level until 1994. Since 1994 the catches have averaged nearly 30 thousand tons per year. The AMSY for the stock, estimated with production models, is about 30 thousand tons. The current biomass is thought to be above that which would produce the AMSY, and fishing effort below the level needed to harvest the AMSY. In short, the population does not appear to be overfished, but, scientists have cautioned that because of the great uncertainty in the estimates of fishing mortality and biomass, fishing effort should not be increased. The SCRS recommended a catch quota for 1999 equivalent to the current replacement yield of 28,200 tons.

There are no conclusive assessments for the Mediterranean stock.

Bluefin

There are two species of bluefin tuna, southern bluefin (*Thunnus maccoyii*), found throughout the temperate waters of the southern hemisphere, and northern bluefin (*Thunnus thynnus*), found in the north Pacific and the north Atlantic (Some taxonomists consider the northern bluefin of the Atlantic and the Pacific as separate species). They are a slow-growing and long-lived species, with some individuals reaching more than 25 years of age. In terms of tonnage landed, bluefin is the least important of the principal market species of tuna; however, they are the most commercially valuable

of all the tuna species. Because of their large size, and the color, texture, and high fat content of their flesh, they are the most sought-after species for sashimi, and command a higher price than any other species of tuna. Southern bluefin spawn in the eastern Indian Ocean, and as they grow they migrate through Australian coastal waters to the high seas, where they are found in the southern parts of all three oceans. In the Pacific Ocean northern bluefin spawn in restricted areas off Formosa and southern Japan, and in the Sea of Japan; some of them migrate across the Pacific to off North America, and then return to the spawning grounds in the west as they approach sexual maturity. In the Atlantic northern bluefin occur in most waters north of the equator and in the Caribbean and Mediterranean Seas. Spawning occurs in the Mediterranean Sea and the Gulf of Mexico. World catches of the two species combined have declined from over 100 thousand tons during the 1960s to about 65 thousand tons in recent years.

In the northwestern Pacific, around Japan, northern bluefin are taken throughout much of the year by a variety of gears, including purse seines, trolling gear, longlines, fixed traps, and pole-and-line gear. In the eastern Pacific purse-seine vessels take almost all of the catch, mostly in near-shore waters off northern Baja California, with some lesser catches off southern California. Recreational fishers have been harvesting a significant share of the catch from the EPO during the last decade. Throughout the 1960s catches averaged about 25 thousand tons per year, about 40% from the eastern Pacific and the rest from around Japan; during the 1970s they averaged about 20 thousand tons, but varied a great deal from year to year (Figure 6). During the 1980s effort directed at bluefin declined, resulting in a reduction in catches: during that decade annual catches averaged about 14 thousand tons. The portion of bluefin that migrate to the eastern Pacific is highly variable, and reduction in that migration may also have had something to do with the reduced catches of bluefin in the eastern Pacific. If fishing in the eastern Pacific is resumed at pre-1980 levels catches could be increased, perhaps to former levels. However, much of the current catch consists of small fish, and if these could be protected until they reached a larger size, total production of bluefin from the Pacific could increase.

Northern bluefin tuna are distributed widely throughout the Atlantic Ocean. Historically they were taken in the western Atlantic as far north as Nova Scotia and as far south as southern Brazil. In the eastern Atlantic they were taken off Norway in the north and as far south as North Africa and throughout the Mediterranean Sea. For management purposes, the population has been divided into an eastern and western stock, with the stock boundary approximately equidistant from the two continents. There is some mixing between the two stocks, however, and some scientists think that the bluefin of the Atlantic Ocean and Mediterranean Sea should be considered as a single stock for management purposes.

Between 1950 and 1970 the total annual catches from the entire Atlantic ranged between 30 and 35 thousand tons. Catches declined to about half that level during the early 1970s, and then increased to the 1994-1996 level of about 48 thousand tons (Figure 6). By 2000 catches decreased to less than 35 thousand tons. Judging from these trends, it would seem reasonable to assume that the fishery for bluefin in the Atlantic is in a reasonably healthy state and capable of sustaining the current levels of catch. However, examination of more detailed information leads to the opposite conclusion.

For the western stock, catches were at their maximum (10 to 20 thousand tons per year) during the early 1960s, after which, in the face of increasing fishing effort, they declined to around 3 to 7 thousand tons per year. Because of these declining catches and a declining biomass, in 1982 ICCAT implemented catch limits, and annual quotas of between 2 and 3 thousand tons have been in effect since. Current assessments suggest that catches of 2,500 tons would be sustainable for the western Atlantic, but at that level of exploitation the biomass of the stock, which is considered to be at a very low level, would not change. In order to ensure any increase at all in biomass the quotas would have to be set lower than current levels of catch, and to increase biomass to AMS_Y levels within 20 years they would have to be reduced to 500 tons per year.

For the eastern stock (which includes the Mediterranean Sea), catches fluctuated around 20 thousand tons during the early 1960s, hovered around 10 thousand tons until the mid-1970s, and then increased steadily until 1996, when they reached more than 46 thousand tons. Since then they have declined. Until 1974 about 70% of the catch came from the eastern Atlantic, but then the catches in that area began to decline while those in the Mediterranean increased, and now comprise the major share of the catch. SCRS scientists have estimated that current catch levels in the eastern Atlantic are not sustainable, but that a catch of about 25 thousand tons per year would halt the decline of the biomass. Catch quotas of 32,000 and 29,500 tons were set for 1999 and 2000, respectively. Other conservation measures have been agreed to in the past, but they have not been effective. For example, a minimum size limit of 6.4 kg (with a 15% tolerance) was approved several years ago, but in recent years over 40% of the catch has consisted of fish smaller than this limit. There is grave concern over the status of the bluefin stocks in the Atlantic. Because the eastern stock is so much larger than the western stock, even with low rates of mixing the effects of overfishing in the east could adversely impact the success of the conservation program in the west.

As mentioned above, southern bluefin spawn in the eastern Indian Ocean, and as they grow they migrate through Australian coastal waters to the high seas. Catches have declined considerably over the last decade, from nearly 50 thousand to about 15 thousand tons (Figure 6). The decline is due to overexploitation of younger fish, and possibly a decline in recruitment attributable to a reduced spawning stock; some scientists have suggested that recruitment is in danger of falling to critically low levels unless the spawning biomass is increased substantially while others believe that recruitment is independent of stock size for the range of stock sizes observed in the fishery. Catch limits have been placed on the harvest of southern bluefin by the Commission for the Conservation of Southern Bluefin Tuna (CCSBFT). Australia, Japan, and New Zealand, the principal nations involved in the management of the fishery for southern bluefin, have had catch limits placed on the harvest of this species throughout its range, although there is some dispute as to the status of the stock and what those limits should be. The current annual catch quota is about 12 thousand tons, but about 15 thousand tons are actually being taken, the excess mostly by nations other than the three mentioned above. The quota was set to allow the population to recover, but there is some disagreement on whether the level is low enough to ensure an increase in abundance.

LOOKING AHEAD

Production

In general, the outlook for world production of skipjack and yellowfin tuna is mixed. For yellowfin, most of the fisheries are probably fully exploited. For skipjack, catches can on the average possibly be increased in the Pacific, but probably not much, if any, in the Atlantic and Indian Oceans.

In the eastern Atlantic the catches by the surface fleets targeting yellowfin and skipjack have reached the upper sustainable limit of yellowfin and probably are near that limit for skipjack. This tendency became obvious in the early 1980s, and caused many purse-seine vessels from the Atlantic to transfer their operations to the western Indian Ocean.

Although the scientific assessments of the stocks in the western Indian Ocean are much less conclusive than those for the Atlantic, it appears that the surface catches of yellowfin and skipjack are at or near the maximum that the stocks can support. The potential for increased production of these two species in the eastern Indian Ocean is unknown.

In the eastern Pacific Ocean the stock of yellowfin tuna is fully exploited, but the skipjack stock could possibly sustain increased average catches. However, increasing the catch of skipjack could

lead to overfishing of yellowfin and bigeye, since small yellowfin and bigeye are often caught together with skipjack, especially on FADs.

In the western Pacific some increase in catch may be possible. This region supports the largest tuna fishery in the world, producing nearly 60% of the world's skipjack and 35% of the world's yellowfin. Analyses conducted by scientists of the SPC suggest that the skipjack stocks of the region can support an increase in catch. However, for this increase to become reality the stocks of currently underexploited skipjack must be identified, there must be a demand for the raw material, and they must be vulnerable to fishing gear. Similar studies of yellowfin tuna suggested that any increases in fishing effort on yellowfin in the western tropical Pacific may not lead to sustained increases in catch. Increasing fishing effort may lead to increased catches of skipjack but, since in the western Pacific, as in the eastern Pacific, skipjack are often caught together with small yellowfin and bigeye, the problem lies in ensuring that the increase is in catches of skipjack only, and not those of yellowfin and bigeye.

Assessments and management of bigeye tuna present special problems. Due to the fact that they inhabit the deeper layers of the ocean, catches of bigeye have historically been taken mostly by longline vessels. With the expansion of purse-seine fishing throughout the world's oceans, and the stabilization of production from 1990 to 1997, surface fleets have developed the use of FADs to capture skipjack, and previously unavailable bigeye. Whereas longline vessels capture large bigeye near the optimum size for maximizing the yield per recruit, purse-seine vessels generally catch small bigeye well below that size. In all the major tuna-fishing regions of the world purse-seine catches of bigeye are increasing, while the tendency has been for longline catches to decrease. However, it is uncertain whether total catch will increase. The natural mortality rate of bigeye is believed to be lower than that of yellowfin. (Natural mortality almost certainly varies with age, with younger fish having higher rates than older ones, but good estimates of age-specific mortality are not currently available.) If the natural mortality rate of bigeye is low, as it was for some time believed to be, then the current expansion of catch in the surface fisheries cannot be sustained, and overall catches of bigeye will decline. However, if the mortality rate of bigeye is similar to that of yellowfin, then total catches of bigeye can be increased. In either case, longline catches of bigeye will decline. From an economic point of view the effect would be enormous, since the value of the large bigeye caught by longliners and destined for the *sashimi* market is far greater than that of the smaller fish caught by purse seiners and destined for the canned fish market.

Because of these uncertainties regarding the biology of bigeye, it is difficult to know with any degree of confidence whether catches of bigeye can be expected to rise or fall in the future.

Of the six stocks of albacore harvested commercially, at least one is considered to be overexploited, three are considered to be fully exploited, and the status of the remaining two is uncertain. Judging from the lack of a trend in the world production of albacore over the last 25 years, and the high degree of interannual variability in the catch, it does not seem likely that increased levels of fishing effort would result in significant increases in catch. Continued fluctuations in catch, associated with a changing environment, will likely be the norm for the future.

Of all the principal market species of tuna, bluefin have suffered the most from the ravages of heavy exploitation, for two main reasons: their longevity, and their exceptionally high value in the *sashimi* market.

Most seriously overexploited is southern bluefin. Production is now about half of what it should be under a proper management regime. To return population abundance to former levels will require, at a minimum, a long-term commitment to keep catches at the currently low levels, or more likely at even lower levels. Judging from the difficulties scientists responsible for the assessment of the southern bluefin stock are having in agreeing on their assessments, it is possible that the current conservation program could be weakened. If that were to occur, this already heavily depleted stock could be further affected.

Even though total catches of northern bluefin from the Atlantic and Mediterranean are still at high levels, the stocks in both the east and west are considered to be overexploited. Without effective management in the eastern Atlantic and Mediterranean, many analysts consider that overall catches will decline.

Annual catches of northern bluefin in the Pacific have fluctuated between about 15 and 30 thousand tons over the last several decades. During the last decade catches have declined, but this may be due in part to the decrease in fishing effort in the eastern Pacific. Studies show that if catches of small bluefin taken in the troll fishery of the northwestern Pacific could be reduced, overall production could be increased on a sustained basis as a result of increased yield per recruit.

Judging from current trends in these fisheries for bluefin, and the difficulties in implementing effective management measures, it is possible that world catches of bluefin will not increase, but rather decline.

Because of increasing demand, declining production, and the high price of bluefin, a number of attempts have been made to rear the species in a controlled environment. Bluefin ranching, which involves capturing wild bluefin, holding them in anchored pens, and growing and fattening them for the *sashimi* market, is being developed in various regions of the world, including Japan, where the methods were originally developed, Australia, Morocco, Spain, Croatia and Mexico. This industry is expected to grow.

In view of all the above, it seems likely that the combined world production of yellowfin, bigeye, albacore, and bluefin will not change very much in the future from what it has been during the past few years. Annual production of those species has averaged slightly more than 1.8 million tons over the last several years, and will probably stay near that level in the future. Skipjack, however, has shown a significant increase in production, going from about 400 thousand tons in 1970 to an average of nearly 2 million tons since 1998, although fluctuations in the catches of skipjack due to natural causes will continue in the future, as they have done in the past. Catches of all of these species could move in either direction in the future however, depending on a number of factors.

On the one hand, if more purse-seine vessels enter the fishery in the western Pacific, either through new construction or transfer from other areas, and if the scientists estimates of population abundance are correct, and these vessels are able to realize the potential increases in catch that the skipjack stock in that region may be able to support, then world tuna catch could possibly increase by as much as 10 to 15%. On the other hand, there is a real possibility that, unless effective management controls are implemented for presently fully-exploited tuna resources, overfishing of those species could occur and world catches decline.

These two possibilities are not mutually exclusive. Newly-directed fishing effort in the Pacific could increase the catch of skipjack in that ocean, while causing overfishing of the other species, both in the Pacific as well as in other areas.

CONSERVATION AND MANAGEMENT

Tunas are a living, renewable resource. The rate at which they are harvested affects the rate at which they replenish themselves and of course, their abundance. Currently accepted conservation practice calls for the populations of tuna to be maintained at or above levels of abundance at which they can support maximum sustainable yields. To accomplish this, the rate that individual fish are removed from the population by a fishery must be kept in balance with the rate at which the fish replace themselves. Once the population is at the maximum sustainable yield level, exceeding this rate can result in overexploitation and ultimately reduced catches. Insuring these optimal rates of exploitation requires scientific information about the dynamics of the tuna populations, how fast they grow and die,

their distribution in time and space, how fishing affects them and how the environment influences these characteristics. Most tunas are widely distributed throughout the oceans of the world. They undertake extensive migrations that move them through the coastal zones of many nations and on the high seas. Their proper conservation requires that they be studied and managed throughout their entire range. To do this requires cooperation among the coastal states through whose waters the tuna pass as well as the nations that fish them on the high seas. In fact, this concept of highly migratory species and international cooperation has been codified into international law. Article 64 of the United Nations Law of the Sea Convention calls on all nations to work together through appropriate regional organizations in order to manage the world's tuna resources. There are a number of these tuna bodies that are currently involved in the scientific study and managements of tuna resources.

Regional inter-governmental tuna bodies

The oldest of the bodies is the Inter-American Tropical Tuna Commission (IATTC), established in 1949, and responsible for the scientific study and management of tunas, billfishes, and other tuna-like fishes in the eastern Pacific Ocean. It is also responsible for the conservation of marine mammals taken in association with tunas, an issue that has been at the heart of one of the most heated conservation controversies of this century. This controversy nearly caused the demise of the tuna fishery in the EPO. Through the combined efforts of government, responsible environmental organizations and the tuna industry, and backed by good science, the crises has been diminished, but not completely averted. Dolphin mortality has been reduced to insignificant levels in the population sense and the way has been cleared to bring rationality to the market place by defining dolphin safe in a manner which allows encirclement of dolphins during the fishing process, but disallows mortality of dolphins. The IATTC has set limits on yellowfin catch, on the use of FADs to protect small bigeye, and on dolphin mortality. It also set limits on the number of purse-seine vessels that could operate in the EPO during 1999, but has been unable to do so since that year.

The second oldest international tuna organization is the International Commission for the Conservation of Atlantic Tunas (ICCAT), created in 1969, and responsible for the scientific study and management of tunas and billfishes throughout the Atlantic Ocean and Mediterranean Sea. ICCAT has made a number of recommendations for management over the years, and on the basis of these recommendations annual catch limits have been placed on bluefin, swordfish, and albacore, as well as measures to reduce landings of marlins. ICCAT has also set minimum size limits for yellowfin, bluefin, and bigeye tunas, and has initiated efforts to limit the number of vessels that can operate in the fishery for bigeye.

A third body, the Commission for the Conservation of Southern Bluefin Tuna (CCSBT), was created in 1995. This body differs from the other organizations in that it deals only with a single species, and is responsible for the management of that species throughout its entire range, which includes all oceans of the southern hemisphere. Catch limits, which are allocated to member governments, have been in effect each year since the formation of the Commission. The scientists representing the various member governments of the CCSBT have found it more and more difficult to reach a consensus on the status of the bluefin stock, and as a result the future of the program has been placed in jeopardy.

The fourth of the international tuna bodies is the Indian Ocean Tuna Commission (IOTC), which is responsible for the management of tunas and tuna-like species throughout the Indian Ocean. The IOTC has not yet instituted management measures, but the parties have called for action designed to limit the number of fishing vessels that can operate in the region.

The only area of the world in which there is currently no Article-64 type tuna organization is the western Pacific, the area that supports the largest tuna fisheries in the world. However, the nations of

the region as well as distant water fishing nations exploiting tuna in the area have successfully negotiated a treaty for the establishment of an Article 64 type body for the west-central Pacific Ocean. The treaty, which has been signed, but not yet ratified, will establish an organization responsible for the scientific study and management of the tuna and tuna like species of the west-central Pacific Ocean. The treaty will empower the Parties to deal with all aspect of tuna management including the setting of catch limits, allocating those limits among players and limiting the number of vessels that can participate in the fisheries. It is uncertain when ratification of this treaty will take place and how effective it will be if some of the major fishing nations of the region do not participate in the organization. Fortunately, there are two bodies, the Forum Fisheries Agency (FFA) and the Secretariat of the Pacific Community (SPC), that have worked to collect catch statistics and biological information for the tuna fisheries of the region. They have been able to monitor the fisheries and provide initial assessments for some of the stocks supporting these fisheries, although their activities have been limited by financial and statutory constraints.

These regional tuna organizations all have the responsibility of maintaining the populations of tunas and tuna-like fishes for which they are responsible at or above levels of abundance which can support maximum yields on a sustained basis. In striving to achieve this objective there are a number of common issues that will affect them all, and which will also affect how the tuna industry conducts its business.

Controlling fishing mortality

Most urgent will be controlling fishing mortality on the stocks of tunas that are already fully exploited, or in some cases overexploited. This is complicated by the fact that tuna fisheries are multiple-species fisheries, and in many cases fishing mortality on one species may need controls while a second species caught together with the first species may be able to support increased catches. An example of this is the fishery for yellowfin and skipjack tunas in the eastern Pacific Ocean. Yellowfin is fully exploited and increased fishing mortality on this species would result in reduced abundance and lower catches, while skipjack can sustain increased yields. In fact since the advent of FAD fishing in the EPO, catches of skipjack have doubled. Equally difficult will be directing fishing mortality toward fish of specific ages or sizes. It has been shown that capturing tunas when they are large results in greater production than capturing them when they are small; hence the concern over the extensive use of FADs. Large catches of the small fish which FADs tend to attract reduces the average size of fish in the catch, which can in turn reduce yield per recruit, biomass, and the resulting potential catch. This form of fishing has been expanding rapidly in all the major surface fisheries of the world; large quantities of small fish are being taken, and this is causing concern over the possible adverse impacts on the stocks of tuna being exploited. In the eastern Atlantic, the western Indian Ocean and the eastern Pacific the problem has become so acute that controls are being placed on the use of FADs.

In general, there have been many approaches used to limit fishing mortality in commercial fisheries. These include catch quotas, closed areas and/or seasons, restrictions on the number of days fishing, restrictions on certain types of gear, size limits on fish, and various combinations of these methods. Such schemes have not always been successful because they do not address the problems of increasing efficiency and growing fleet size that often accompanies programs to limit fishing effort, mortality, or catch.

Problems of bycatch

An additional topic of increasing importance in tuna fisheries, and one being discussed by environmentalist and the tuna industry, is that of bycatch. Many technical papers and conferences have

focused on the topic in the past, and it will continue to be the focus of increasing attention in the future. All tuna fisheries generate some bycatch, which for this paper is defined as catch that has no market value and is therefore returned to the sea, usually dead. The most complete database available on bycatch in a tuna fishery is that compiled by the IATTC for the purse-seine fishery of the eastern Pacific. According to this database, the bycatch associated with log or FAD fishing can be as high as 20% of the landed catch, and these figures may be representative of similar fisheries in other regions. In the EPO scientific efforts to evaluate the impact of bycatches on the ecosystem are underway, while in the meantime IATTC members have taken measures to prohibit unnecessary dumping of bycatch at sea. However, it is still too early to tell how effective these measures will be in reducing bycatch. Because of the widespread attention that this issue is receiving, it can be expected that in the future there will be increasingly more controls placed on tuna fisheries in an effort to reduce bycatch.

Limiting fishing capacity

Another topic that is receiving a great deal of attention is that of fishing capacity. The United Nations Food and Agricultural Organization has organized a number of meetings dealing with the topic of capacity of the world's fishing fleets. These meetings, though not dealing specifically with tuna, have concluded that nearly 70 percent of the world's fisheries are either overexploited or nearly fully exploited, and that this serious state of affairs is the result of a growing demand for fish coupled with a fishing capacity that is increasing more rapidly than the catch of fish, and the continued use of subsidies to offset the cost of fishing. These concerns lead to the adoption, within FAO, of an international plan of action for the management of fishing capacity. Similar concern has been expressed over the large fleets of tuna vessels operating throughout the global oceans.

Nearly all of the regional tuna bodies have expressed concern over the size of tuna fleets operating in their respective regions, and have called for some measures to limit fleet size. In 1999 the IATTC limited the number of purse seine vessels that could operate in the EPO. These efforts to limit capacity were motivated by the growing size of the fleet, which went from about 100 thousand tons of capacity in 1992 to 140 thousand tons in 1999, and the experience of overfishing resulting from an increase in fishing capacity during the late 1970s, when capacity increased from about 100 thousand tons in 1972 to about 170 thousand tons in 1979. Unfortunately the nations of the IATTC could not agree to extend the limitations beyond 1999 although there are still continuing efforts to do so. This failure to continue the limitations stemmed primarily from the fact that nations with small fleets, or no fleets at all, would not agree to future controls on the number of vessels permitted to operate in the EPO unless provisions were made for them to develop their own fleets. The Commission has so far been unable to develop a formula for controlling fleet size with which all nations can agree. In the case of ICCAT the number of vessels that can operate in certain fisheries have been limited and the need to limit vessels in other fisheries is the subject of discussion. There are similar discussions within the IOTC, which has committed to undertake action to limit fleet size in the Indian Ocean. There is a general consensus among all of these tuna bodies that the growing tuna fleets of the world will place in jeopardy the conservation of tuna, and that there should be controls placed on the number of vessels permitted to operate.

The situation of too many vessels was so critical in the longline fishery for tunas due to reduced catch rates and declining earnings that longline vessel owners initiated action to reduce the number of longliners. The Japanese industry agreed to reduce the number of longline vessels in their fleet by 130. Taiwan agreed to limit their fleet and to call back to their flag Taiwanese owned vessels operating under flags of convenience. The 130 vessels of Japan and the "called-back" vessels of Taiwan will be scrapped and the vessels owners compensated. An industry organization, the Organization for Promotion of Responsible Tuna Fisheries (OPRTF), was established to follow tuna entering the Japanese market to ensure that such tuna is from cooperating nations, and to assist in the reimbursement of Japanese

and Taiwanese fishermen for the costs of implementation of the program. Longline fleets from other nations are joining with the Japanese and Taiwanese in their efforts to resolve the excess capacity problem.

There has been similar concern expressed by purse seine owners. However, here the situation is more complex. Some species such as yellowfin and bigeye are fully or overexploited while skipjack is not. As fleets increase, skipjack catch may increase as well, but this increased fishing effort could result in overfishing of the other species. In addition, more fishing effort either as a result of more vessels or increased efficiency through the use of FADs, can result in supplies of fish in excess of demand. This apparently happened in 1998, 1999 and 2000. Apparently skipjack was unusually abundant in many parts of the world's ocean during those years, and with the use of FADs catches were much greater than normal. In 1998 in the WTP skipjack catches were about 250 thousand tons greater than normal and in 1999 in the EPO skipjack catches nearly doubled. During this same period the ex-vessel price for tuna plummeted to the lowest level in several decades. Because of these concerns an initiative by the purse-seine vessel owners of the world, which was similar to that of the longline industry, was undertaken in late 2000. The initiative was to limit catches of purse-seine caught skipjack as well as to limit the number of purse-seine vessels. The World Tuna Purse Seine Organization (WPTO) was created by the industry and is attempting to prevent problems of excess fishing capacity and production in excess of demand.

So far efforts to limit fishing fleets have not met with a lot of success. However, the initiatives of the industry to limit vessel numbers is encouraging and can offer the catalyst for governments to work together to develop a workable system for effecting such limitations. It seems rather convincing, based on the industry initiatives and the actions of the regional tuna bodies that limits are needed. However, what is not so clear is what should these limits be and how can they be structured so that the goals of conservation are realized and so that governments will accept them.

There are currently more than 570 high-seas purse-seine vessels in the world fleet. These vessels range in size between 250 and 4000 tons of carrying capacity, with a combined fleet capacity of more than 600 thousand tons. This fleet captured about 2 million tons per year in recent years, which represents about 3 tons of catch per ton of capacity per year, or about 3600 tons per vessel per year, or about 3 trips per year. A well-managed vessel can easily make 4 or 5 trips per year, and some vessels are producing in excess of 10 thousand tons per year. If the current purse seine fleet of the world were managed well it could be reduced substantially and still harvest the same amount of tuna. This would keep vessels profitable and reduce pressure by economically stressed fishermen to avoid conservation regulations. Of course, critics of limiting fishing capacity in the tuna fleet will argue that it is possible to increase skipjack catches over current levels. This may be true, but probably only in the Pacific. There are several important points to remember in addressing these criticisms. First the current fleet is larger than needed to harvest the fully exploited yellowfin stocks. If allowed to stay at this level, or to grow, it will be difficult to maintain conservation controls for yellowfin, and bigeye, because of economic pressures to insure profitability by catching more fish. Secondly, skipjack catches can perhaps be increased somewhat in the Pacific Ocean, but skipjack are notoriously highly variable in their abundance. This variability is mostly fishery independent and in some years, when skipjack is abundant, catches will be high. This can, like the case during the last few years, depress prices paid to fishermen, causing economic stress in the fishery. In other years when skipjack is not so abundant, catches will decline, there will be an excess of fishing capacity and waste of capital, and pressure to overfish the protected species such as yellowfin will be high. It seems that there is ample justification for limiting capacity of the world purse-seine fleet.

The task of developing a scheme to limit and even reduce fishing capacity in the world tuna fleet that will be acceptable to all players will not be an easy one. The essence of the problem is how to handle the desires of nations with small fleets, or no fleets at all, to acquire vessels, and those with fleets to retain them. To accomplish this there will need to be developed some system for partitioning ves-

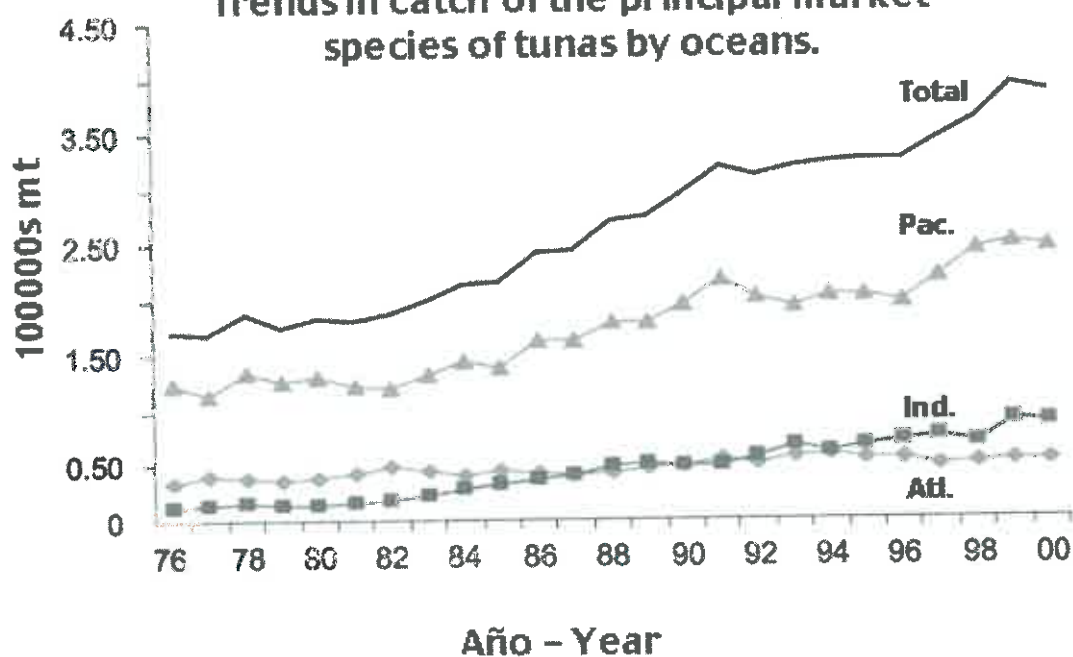
sels among players. Such a scheme will need to be based on some commonly accepted set of criteria. The most commonly mentioned criteria discussed by nations concerned with limited entry are historic participation in the fishery and coastal adjacency to the resource. However, a number of other criteria have recently been the subject of discussion among the various tuna bodies considering limiting fishing capacity. These include, *inter alia*, the needs, interests and dependency of states regarding the resources of tuna, the contribution of nations to the conservation and management of stocks of tuna, and domestic consumption and fishing traditions with respect to these tuna resources. Once a set of criteria can be agreed to a target fleet size for a particular fishery can be partitioned among the respective players. If fleets are too large and need to be reduced then a scheme to accomplish this must be developed as well. One such scheme that has proven successful in some fisheries is that of "buy-back" wherein governments or industry purchase vessels and remove them from the fishery. If fleets are allocated among players, based on some set of criteria, then provision has to be made for how vessels can be redistributed among those players. In some other fisheries this has been accomplished by establishing property rights on a national or individual fisherman basis. Nations or individuals wishing to enter the fishery, or expand their fleet would be required to negotiate vessel changes with those currently having a right to participate in the fishery. These are only a few of the ideas that have been suggested for limiting fleet size. There are many others that will have to be examined before a suitable and acceptable systems can be developed for the various tuna fisheries.

Limiting fleet size in an effective and lasting manner will be a difficult task to achieve, and will take time and political will on the part of the participating nations. The idea that every individual has a right to exploit the resources of the high seas by merely building a vessel and putting to sea will need to be viewed in a slightly different light than has been the case in the past. There will be a cost to exercise that right. There are enough and perhaps even too many tuna vessels in the world. For a new player to enter, an old player will have to leave. The choices will be difficult to make, but made they must be, if the tuna resources are going to be maintained at levels of abundance that can sustain maximum yields and the industry is to be profitable.

As our world becomes more crowded, and the demands on our natural resources such as tuna grow, the problems of managing these resources will become increasingly complex. New approaches will have to be developed which will change the previously held views and norms on resource utilization. Many of the perceived concepts, principles and rights that have governed the utilization and management of these resources will need to be revisited. Concepts such as "common property" and "unrestricted fishing frontiers" on the high seas will have to be reconsidered if these resources are going to be used wisely. During the coming years there will be increasingly more controls and restrictions on how these resources will be harvested and utilized. In one respect this is unfortunate because the freedoms of fishing that have been enjoyed for centuries will be eroded, but in another respect it is fortunate because it will insure the sound management of the tuna resources and insure that the legitimate business of tuna fishing can endure and prosper.

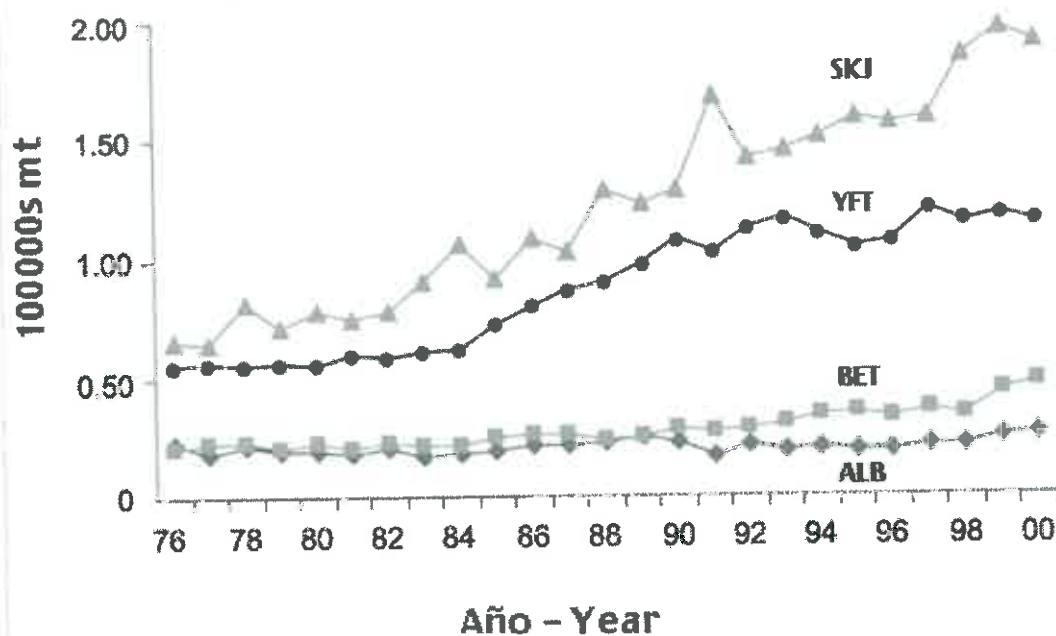
Tendencias de las capturas de las principales especies comerciales de atunes, por océano.

Trends in catch of the principal market species of tunas by oceans.



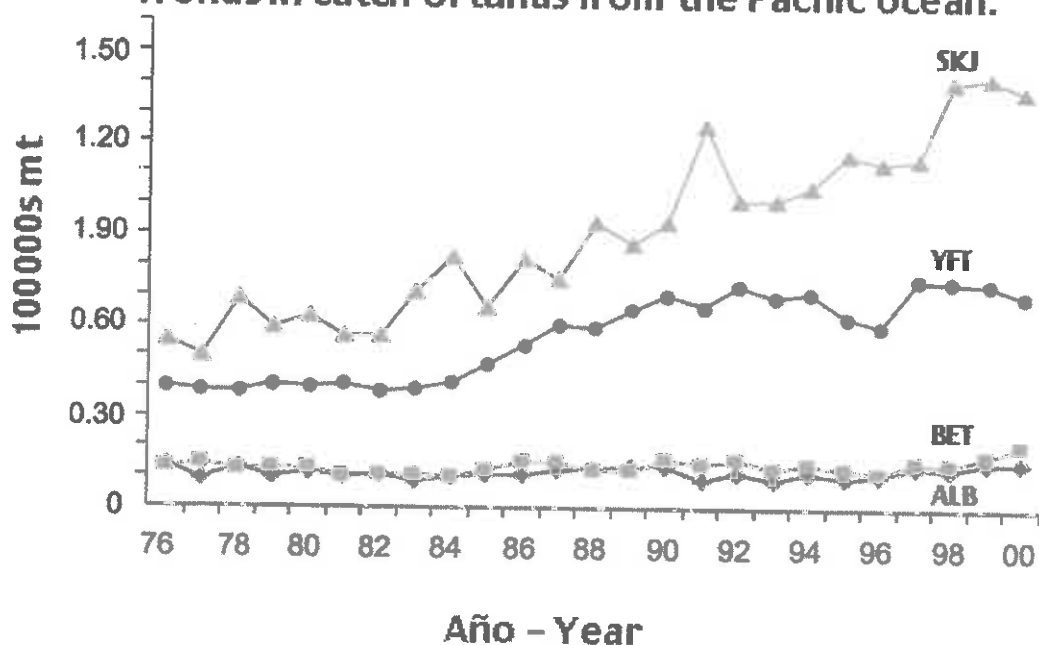
Tendencias de las capturas mundiales de atunes, por especie.

Trends in world catch of tunas by species.



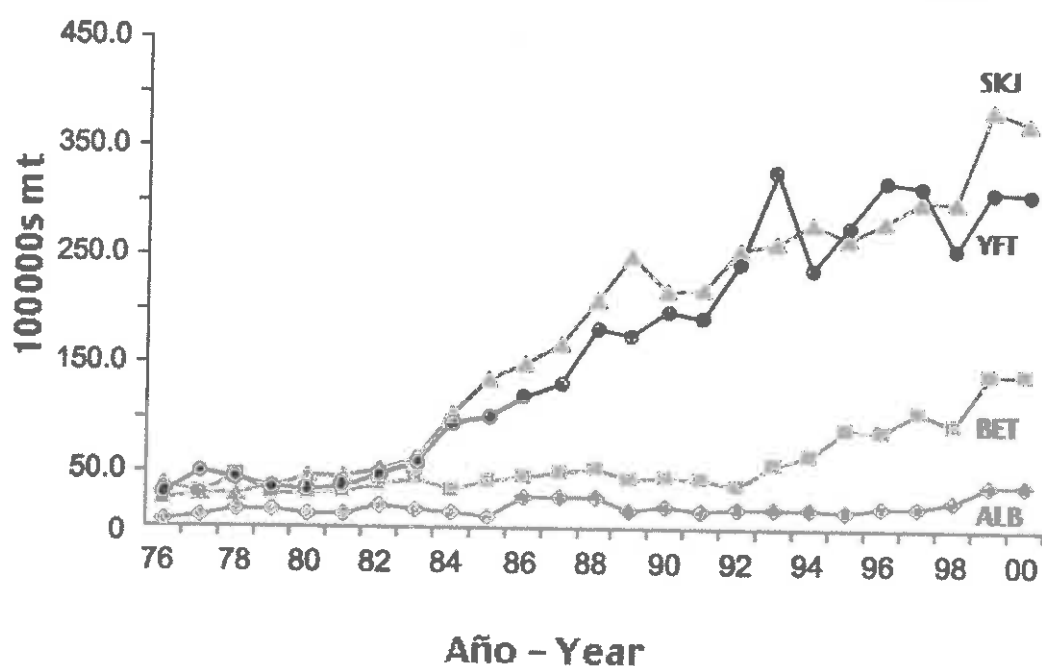
Tendencias de las capturas de atunes del Océano Pacífico.

Trends in catch of tunas from the Pacific Ocean.



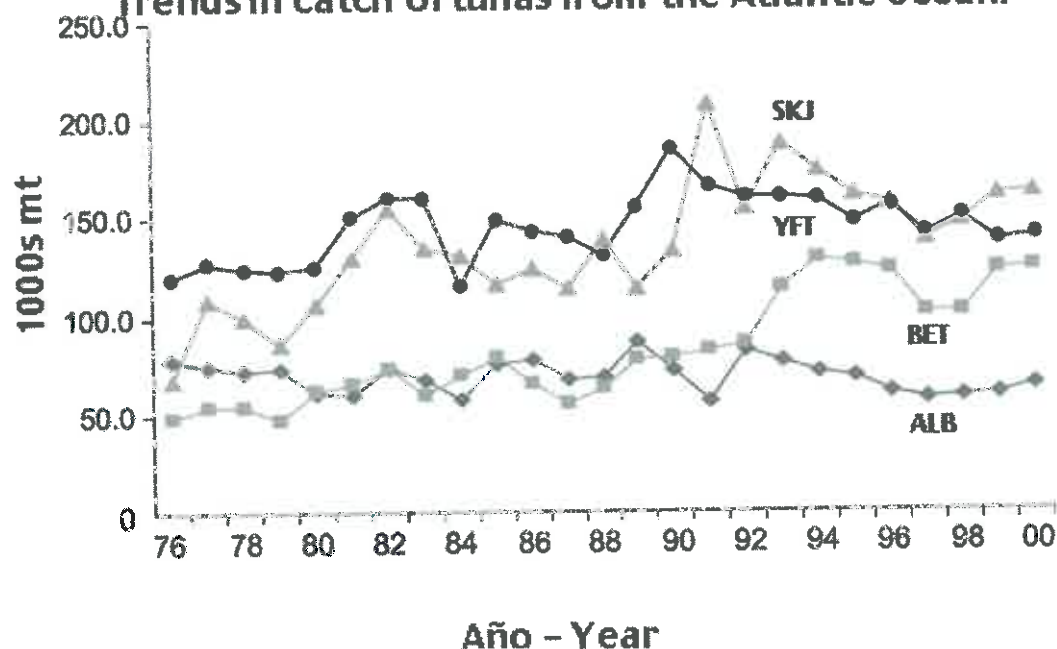
Tendencias de las capturas de atunes del Océano Índico.

Trends in catch of tunas from the Indian Ocean.



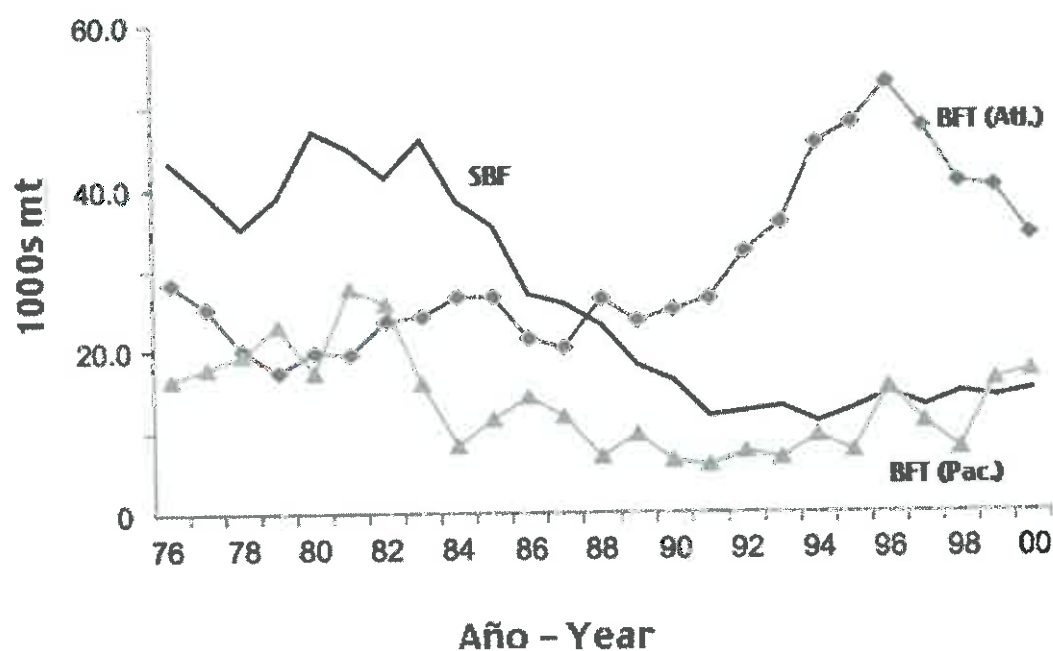
Tendencias de las capturas de atunes del Océano Atlántico.

Trends in catch of tunas from the Atlantic Ocean.



Tendencias de las capturas de atunes aleta azul.

Trends in world catch of bluefin tuna.



PONENCIA / *SESSION*

1

PERSPECTIVAS DEL MERCADO EUROPEO DEL ATÚN

ILMO. SR. D. SAMUEL JUÁREZ CASADO
SECRETARIO GENERAL DE PESCA MARÍTIMA

PONENCIA / *SESSION*

8

ANALYSIS OF THE RAW MATERIAL SITUATION AND THE TUNA MARKET AT WORLD-WIDE LEVEL

RENATO CURTO
CHAIRMAN TRINE-MARINE INTERNATIONAL, INC. USA

PERSPECTIVAS DEL MERCADO EUROPEO DEL ATÚN

ILMO. SR. D. SAMUEL JUÁREZ CASADO

SECRETARIO GENERAL DE PESCA MARÍTIMA

En el contexto mundial, las pesquerías de atún ganan importancia de año a año. En un contexto de estabilización, e incluso retroceso de la producción mundial de pesca extractiva, en 84 millones de toneladas, la producción de túnidos mantiene una tendencia ascendente. Entre las causas de esta tendencia hay que buscar la mejora de la tecnología de la pesca, junto con una mayor resistencia de estas especies a la sobreexplotación, debido a su propia dinámica vital.

En 1981, las capturas mundiales estaban en torno a 1,8 millones de toneladas. En 1995 habían llegado a 3,1 millones, y el pasado año 2000 estuvieron muy próximas al récord de 4 millones de toneladas.

Las capturas se obtienen sobre todo en el Océano Pacífico (65 – 70 %), seguido del Índico y el Atlántico que se reparten el resto. Casi la mitad de las capturas son de listado, seguido del rabil (35 %), y en cantidades inferiores el patudo, el atún blanco, y el atún rojo.

No obstante, esta dinámica positiva en la evolución de esta flota no puede continuar indefinidamente, y no puede desviar nuestra atención de la necesidad de ejercer una vigilancia constante del estado de las poblaciones, para asegurar la sostenibilidad de la explotación. Es preciso incrementar los recursos destinados a investigación, que actualmente apenas alcanzan el 0,5 % del valor del producto, y es necesario tomar plena conciencia de que, en este caso más que en ningún otro, al tratarse de un recurso altamente migratorio, sólo la auténtica y leal cooperación internacional puede asegurar una explotación racional y sostenible. Resulta alentador el desarrollo de diversas Organizaciones Regionales de Pesca (ORP) en las principales zonas de pesca. Sin embargo, resulta muy preocupante observar actitudes de quienes pretenden cerrar estas organizaciones a la participación de los estados con intereses en la zona, utilizándolas como instrumentos para mejorar la posición competitiva de sus industrias, tal y como está sucediendo en estos momentos con la CIAT o con la MHLC.

Veamos a continuación la situación de Europa. La flota de la Unión Europea produce alrededor de 500.000 T. de atunes al año. Ha experimentado un crecimiento espectacular en los últimos veinte años, desde las 161.000 T de 1981. Sin embargo, el mercado comunitario sigue siendo fuertemente deficitario, ya que la pesca de nuestra flota apenas cubre el 50 % del consumo. Creo que con una producción de 500.000 T., y con un consumo del doble, casi un millón de toneladas, está plenamente justificado que la flota comunitaria tenga una participación en las principales zonas de pesca, y está también plenamente justificado que Europa haga valer su mercado como argumento en el contexto internacional.

El mercado europeo tiene además una tendencia creciente en cuanto a consumo. Ya desde principios de los noventa, Europa es el primer mercado del mundo, al haber superado con creces a los Estados Unidos, que era históricamente el primer mercado. Desde entonces, el mercado americano no se ha recuperado. Se mantiene por debajo de las 500.000 T. de consumo, con 2,3 K. Por habi-

tante y año. Para Europa es importante aprender de los posibles errores de los americanos. Es posible que en esta reducción del consumo hayan influido elementos tales como la mala imagen del producto desde el punto de vista medioambiental, o la merma de calidad que supone la utilización de métodos tecnológicos para reducir costes, tales como el uso de proteínas vegetales.

Volviendo a Europa, el mercado se caracteriza por mantener fuertes diferencias en función de la zona considerada. En los países del sur, el mercado demanda alta calidad, en especial el mercado italiano. En el norte y centro de Europa, la exigencia de calidad es muy inferior, y el atún se utiliza en forma de migas o trozos, siendo el elemento de compra el precio.

Europa tiene una importante industria conservera, en primer lugar España, seguida de Italia, Francia y Portugal. Esta importante industria, junto con la insuficiencia del abastecimiento, justifica el régimen que permanece para el atún en la organización común del mercado de los productos pesqueros, basado en una suspensión arancelaria autónoma, un régimen de indemnizaciones compensatorias, y recientemente el establecimiento de un contingente de 4.000 T. de lomos al arancel reducido del 6%, en el período 2001 – 2003.

Existe una tendencia a utilizar lomos en lugar de atún entero en la industria europea, tendencia que en absoluto justifica la necesidad de un contingente con derechos reducidos. En efecto, la industria puede utilizar atún entero sin restricciones, pero además el abastecimiento de lomos es también suficiente si sumamos la producción comunitaria, que ha crecido mucho en los últimos años, con el aprovisionamiento de los regímenes preferenciales, SPG y ACP- droga, que no son más que proyecciones de la política exterior comunitaria. Esta política exterior se ve apoyada por estrategias empresariales de deslocalización de inversiones en países ACP y SPG, en una tendencia lógica y acertada de búsqueda de sinergias en el conjunto del negocio.

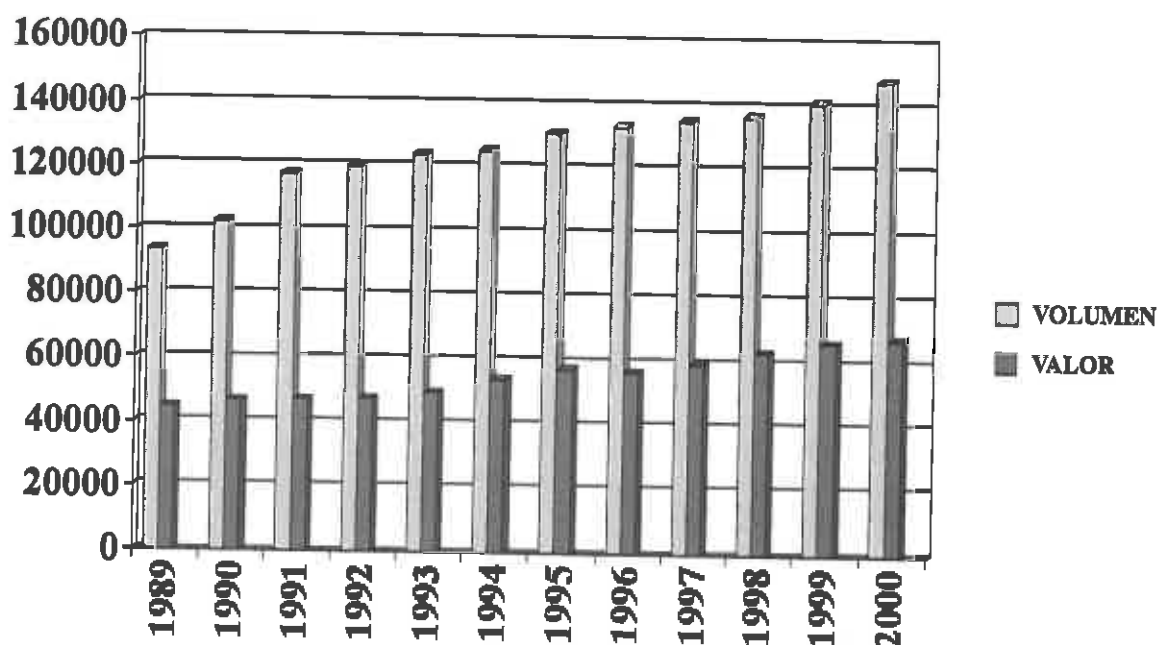
En este contexto, me referiré a un aspecto puntual, el acuerdo para el establecimiento de una zona de libre comercio entre la Unión Europea y México. Atendiendo a la realidad del mercado europeo, los lomos de atún han sido excluidos momentáneamente de este acuerdo. Sin embargo, se contempla el compromiso de que, a más tardar el 1 de septiembre pasado, ambas partes se pondrán en contacto para iniciar discusiones con vistas a la posibilidad de abrir, antes del próximo 1 de enero, de un cupo arancelario preferencial. Es necesario que se comprenda que es una voluntad política de ambas partes el compartir los mercados europeo y mexicano. Es algo consumado e indiscutible, que va a beneficiar a ambas partes, que va a favorecer el desarrollo de nuestros dos pueblos, y España ha tenido mucho que ver en esta política adoptada por la Comunidad Europea. Pero para ello se necesitan dos únicos requisitos: tenemos que ponernos de acuerdo en un calendario y un ritmo de desarme que concilie los intereses de ambas industrias, y tenemos que jugar limpio todos en el terreno de la industria atunera en su integridad, y hoy por hoy, el bloqueo que de manera incomprensible mantiene México a la adhesión de España la CIAT es tan estéril como incomprensible.

Volviendo al mercado comunitario del atún, voy a referirme brevemente al mercado español. España mantiene un aumento constante de la producción y del consumo.

Las exportaciones son también crecientes, y alcanzan cotas muy importantes en los últimos años, ya que hemos exportado en 1999 50.725 T., y en 2000, 69.591 T., lo que supone un incremento espectacular, del 38 %.

Con un elevado consumo, somos un mercado maduro y de calidad. Resulta significativo recordar que España, uno de los primeros consumidores de productos pesqueros del mundo, tiene sin embargo estancado este consumo en los últimos 5 años, siendo el subsector de las conservas de pescado el que registra, sin embargo, incrementos importantes.

PRODUCCIÓN DE CONSERVAS DE TÚNIDOS EN ESPAÑA



En lo referente al mercado español, es necesario mantener la tendencia positiva observada en los últimos años. Con este objetivo, habrá que prestar especial atención a los siguientes aspectos:

- Prestar una especial atención al mantenimiento y la mejora de la calidad, la seguridad y la información a los consumidores. El atún no debe perder la imagen de alimento rico en proteínas y pobre en colesterol, por tanto dietéticamente sano, y obtenido en alta mar, lejos de cualquier fuente de contaminación humana. Para ello es necesario no incurrir en errores tales como el uso de elementos tecnológicos, tales como la proteína vegetal, que puede reducir costes, pero lo hace a costa de reducir visiblemente la calidad y echar por tierra su imagen de producto "natural", la valiosa oportunidad de consignar en una etiqueta que nuestro producto sólo contiene atún, aceite o agua, y sal. Además, es necesario mantener una política de transparencia con el consumidor, indicando claramente qué es lo que le vendemos dentro de la lata. España es pionera en este aspecto, al dotar de carta de naturaleza el uso consolidado en el mercado de denominar exclusivamente "atún claro" a la conserva obtenida a partir del rabal.
- Recientemente, la industria transformadora y la flota pesquera han constituido la primera organización interprofesional de la pesca española, "INTERATÚN", camino más adecuado para procurar una correcta organización del mercado, mejora de la comercialización, y promoción y búsqueda de nuevos mercados.
- En el ámbito comunitario, es necesario mantener el principio de la preferencia comunitaria como elemento que no se contrapone, sino que se complementa, con la adecuada política empresarial de implantación en terceros países.

Vigo, 18 de septiembre de 2001.

ANALYSIS OF THE RAW MATERIAL SITUATION AND THE TUNA MARKET AT WORLD-WIDE LEVEL

RENATO CURTO

CHAIRMAN TRINE-MARINE INTERNATIONAL, INC. USA

Mr. Secretary General, Mr. Chairman, distinguished Ladies and Gentlemen, thank you for coming and thank you for having me. I have great respect for each of you and what you do. I want to speak about three things of vital importance to everyone in our business - and they are Perception, Specialization, and Cooperation. Let's begin with Perception. Why? Because I want to emphasize more than anything else that in our business, our product, tuna, is not just tuna as in bluefin, yellowfin, skipjack, or as in light meat, solid pack, can, or pouch. For tuna is perceived in different ways by different people in different places, and in different markets.

I have come here from California. In California, tuna is perceived as a low-cost, relatively low-calorie food packed in water, which Californians drain before adding an extremely high-calorie product like mayonnaise before spreading it between two slices of bread to give our children, as well as many of ourselves, something to fill stomachs at lunch time.

Now, in contrast, think of how a not too different product is perceived in Italy or Spain.

In these markets, tuna means a moderately higher-priced, still relatively low-calorie product, packed in various ways that make it appetizing and enjoyable just as it comes from the container. In markets like these, the perception of tuna carries different meanings that have a strong influence on the value the consumer places on the product, and the price that will be paid. What it amounts to is this: All of us have a vital interest in how tuna is perceived and how it is valued when it comes to the ever-changing human activity called eating. In fact, it seems to me that we should take as much interest in creating a relationship between eating and the perception of tuna as a company like DeBeers had in creating a relationship between a stone cleverly identified as a diamond and the human activity called loving. In this respect, please disregard the control of an embarrassingly abundant resource, diamonds, and consider what has been accomplished in the way human beings perceive diamonds - and what they are willing to pay for this perception.

How did this perception of diamonds come about? Why does the world think a diamond is forever? It's beautiful, yes, but how can a stone sell for more money than all the tuna sold to the average consumer in a lifetime?

One clear answer is the use of marketing, the use of advertising. Creative, imaginative marketing and advertising can have a dramatic impact on the perceived value of tuna. Our industry needs great marketing, great advertising. In fact, why aren't the great advertising agencies with us here right now? They should be after us, and we should be after them. We simply need to change the way tuna is perceived almost everywhere, not just in California.

But there is more to perception than just advertising, which all the great ad agencies know is one component of marketing. Before the commercials and the ads are created first come all the other fac-

tors - packaging, merchandising, market research - that belong to brand management. And to start to improve the perceived value of tuna, our industry must begin with brand management.

This takes us to my second point: Specialization. Yes, let's leave Cooperation to the last.

We need to recognize that we are in an age of specialization. Recently, we saw one of the major tuna brands sell off its fleet. Perhaps they thought that vertical integration was not necessary. That's fine. Each and every one of us has to do a job where we are expected to do what we do best. So why shouldn't tuna brand owners contract for everything, except one thing - their core competency, and that is brand management.

We can see how successful brands use supply chain management to maximize the return on their investment in their brand equity. Look at the Mars Company. It's one of the largest privately held brand management companies in the world. One of the brands they own is Uncle Ben's. For years and years U. S. consumers have known Uncle Ben's as rice that comes in a box. OK - the brand manager for Uncle Ben's recently introduced a new line of frozen, meal-solution products - frozen bowls of rice with vegetables and meat or chicken. And they also have the same product with noodles instead of rice. Do you think that Mars owns any rice production assets? Or noodles? Do you think that they even own or control any of the processing plants that produce any of these products? No way. They contract for everything - including the distribution facilities.

Divestiture of non-core assets coupled with contracts for "just in time" inventory takes sophistication and trust. For example, recent innovations in information technology, Internet-based virtual private networks, collaborative resource planning and replenishment software, supply chain management software, and so on, give complete visibility of the supply chain to the brand manager. The brand manager is then free to concentrate on other matters - and that particularly includes consumer perception.

Now it's time for the subject of Cooperation - high time, I don't mind saying. If we are going to specialize and free ourselves to do what we do best, we are all going to have to cooperate with one another more than we ever have. In fact, I see no other issue as being more immediately important to us here today. Cooperation is vital to our industry. I think you must know why.

More than ever, our markets, production plants, fishing areas, and boats are all inter connected. Access to better fishing grounds can shift entire fleets to other oceans. Shifting fleets and fishing efforts can cause major interruptions and surpluses in supply of raw material. A change in the E.U. import duty regulations can cause a tuna plant to close in Italy and a loin plant to open in Colombia. A court decision by one country can halt the import of canned tuna from its neighboring country.

I will spare you the numbers. And I have spared you any slides. All you have had to put up with is me. But if you are interested in numbered statistics, please refer to my technical paper. The statistics are all there and what they tell us is we are in a time of tremendous change. Look at the markets. See how the trade flows have changed. These are changes that involve real people, real livelihoods, and real futures. If these changes are to be managed at all, if they are to be cushioned, traded, accounted for, and dealt with in any rational manner, we must find the way to cooperate as much our laws permit.

None of us wants to be dictated to. This is part of our humanity. And perhaps not wanting to be dictated to is what has driven our industry to vertical integration and is an obstacle to specialization. However, if our industry is going to begin to concentrate on what I say is the name of the game, Perception, we absolutely must cooperate with one another. We cannot go on being in this business for ourselves.

And now my own personal perception is I have talked long enough, so thank you all, and thank you, Mr. Chairman.

THE TUNA SUPPLY CHAIN



As my good friend Mr. Edmund Gann says, "Everything starts with the raw material". From there, a very effective supply chain would contain the following elements:

- Good fishing vessels and crews
- Access to productive fishing grounds
- Limited entry to avoid market congestion
- Proximity of production capacity
- Cost effective and productive labor
- Diligent Quality Control
- Socio-economic stability
- Port infrastructure and competitive transportation services
- Favorable duty in destination markets
- Information technology
- Financial resources

Therefore, it is important to first focus on access to productive fishing grounds. The fleet fishing these grounds must be efficient and capable of delivering good quality. This means excellent equipment and refrigeration, discipline to stay away from large sets, small fish, etc.

Economists argue for the direct deliveries of the fish to the plants thereby eliminating the need for transshipment and ocean freight. This also means that the fishing grounds cannot be too far from the plants lest the fishing boats spend too much of their potential fishing time in transit. To be efficient the boats have to maximize their fishing days. Obviously, if you have access to productive fishing grounds that are close to the processing plant, you will be able to maximize fishing days while eliminating ocean freight expense deductions from your fish proceeds. These are the best possible operating assumptions for the boat owner.

As for the processing plants, proximity to productive fishing grounds will minimize the risk of raw material shortages and also provide opportunities for "below market" fish purchases. This occurs when boats will accept a discount in the prevailing price for a fast turnaround to allow them to return to the fishing grounds for a "quick trip".

However, plant location with respect to the fishing grounds is but one factor when considering criteria for tuna processing plants. The other important criteria are the relative cost of labor, the socio-economic stability of the location and, sometimes most important, the cost of duty in the target market relative to competing sources of product.

Take the EU market for example. The cost of duty on frozen cooked tuna loins and canned tuna is 24%. However, if the product has qualifying origin and complies with various rules, the duty is zero. This is a major difference. Considering that labor is usually less than 10% of the cost in loins or cans, you can see that duty savings is much more important than labor cost.

The other thing to remember is that supply chain optimization must consider reliability. The lowest cost source will never be a significant part of a major brand's procurement strategy if there is a history of work stoppages and shipping schedule interruptions. Reliability is worth a lot. To be a major part of someone's supply chain, you have to be reliable.

Degree of reliability and relative cost also apply to logistics considerations, especially the transportation solution from the processing plant to the brand owner's distribution center. The cheapest and most stable source of finished product is worthless if it can't reach the market. This is especially relevant to prospective plants on remote islands with infrequent and expensive transportation service.

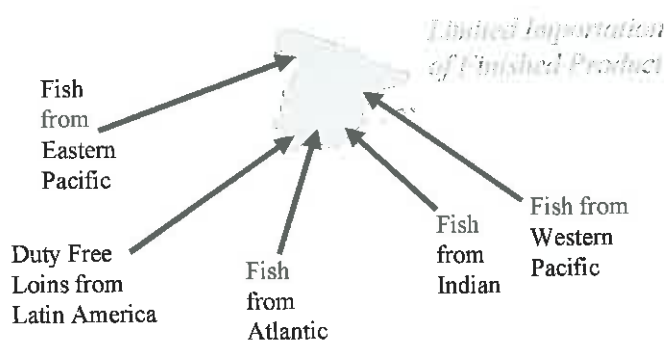
The fact that the very nature of our business depends on fishing should make us rather risk averse when it comes to supply chain planning. Logically, we will need more than one source to manage the risk of fishing and other factors beyond our control. The larger and more valuable our brand, the more important is our need to diversify the supply chain.

Of course, this is all theoretical. It may be impractical or otherwise impossible to diversify sources of supply. In the real world, requirements change. It is difficult to negotiate "requirements" contracts with suppliers. Plants need to operate at capacity for maximum economic efficiency. Enter the role of the spot market. Producers and users can enter into annual or even longer-term contracts for part of their business and leave the balance to the spot market.

We cannot expect the supply chain solution that is optimum today to remain so tomorrow. Some major factors can change quickly, e.g., duty and access. Others change more slowly. In any case we need to constantly review relative costs and reliability so as to continuously optimize our supply chains.

Now let's look at some real world examples of supply chains on a country basis.

Spain's Tuna Supply



By any measure, Spain is a leading tuna country. They have a significant domestic market and export a tremendous volume of canned tuna to their EU neighbors. Despite its significant size and importance, only a minor part of the tuna is actually landed directly by fishing boats in Spain. With the exception of Bonito del Norte catch and possibly some light meat from the Atlantic, the majority of all raw material for the Spanish tuna industry arrives by refrigerated container or carrier, most of it having been transshipped from Spanish or foreign flag purse seiners.

The very productive Spanish purse seiner fleets can be found in the Indian and Atlantic Oceans as well in the Eastern Tropical Pacific (ETP) and the Western Pacific. Some of this fish is transshipped by carriers back to Spain. Some is delivered to foreign canneries. The most interesting is the fish

that is delivered to processing plants in EU duty-exempt, low labor cost countries for conversion into cooked loins and canned product. Conservas Garavilla's plants in Ecuador and Colombia and Calvo's pioneering efforts in Venezuela are noteworthy in this regard. As further evidence of the economic viability of this extension of Spain's tuna supply chain is news of the planned investment by the Albacora Group as well as additional important initiatives by Calvo, all in Central America.

The supply chain from Latin America to Spain emphasizes the following elements:

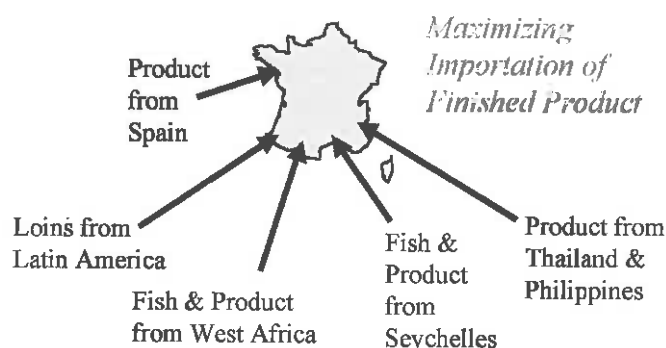
1. Access to productive fishing grounds
2. Plants with low cost labor
3. Duty-free access to the EU market
4. Cost effective transportation

Imports of Frozen Cooked Tuna Loins by Spain				
From	Ecuador	Colombia	Venezuela	Total
1997	9,890	435	334	10,659
1998	8,261	296	486	9,043
1999	12,219	2,509	2,946	17,674
2000	13,076	11,382	0	24,458
Source: Eurostat				

Finally, note that the efficiency of the Spanish tuna industry, in conjunction with its location, makes Spain an important supplier of canned tuna and frozen cooked tuna loins for other major tuna markets in Europe. This is perfect for customers requiring Just in Time inventory replenishment. It is easy to understand how Spanish tuna exports jumped more than 37% in year 2000 compared to 1999 as reported by ANFACO.

2000 Exports by Spain (tonnes)			
To	Canned Tuna	Tuna Loins	Total
Italy	29,125	2,088	31,213
France	5,349	2,764	8,113
UK	1,910	58	1,968
Portugal	3,304	7	3,311
Total	39,688	4,917	44,605
Source: Eurostat			

France's Tuna Supply

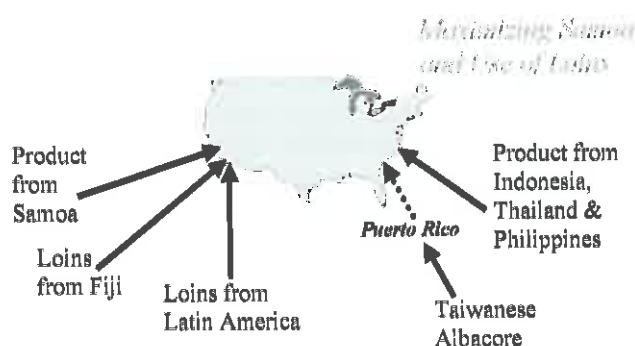


Unlike Spain, France imports relatively little frozen tuna or loins for processing in France. Rather, they import finished product, most of it from the controlled tuna factories in West Africa.

2000 Tuna Imports by France			
From	Canned Tuna	Tuna Loins	Total
Cote d'Ivoire	7,936	2,972	10,908
Spain	5,349	2,764	8,113
Ecuador	145	912	1,057
Kenya	0	984	984
Other	6,508	5,598	12,106
Total	19,905	13,230	33,168
Source: Eurostat			

Comparative data show that the West African factories are losing share of the French requirement. Spain's volume to the French market increased 61% from the previous year. One would expect that Spain will continue to grow in importance as a source of tuna loins and finished product due to price competitiveness, and the convenience of intra-EU shipping and documentation.

US Tuna Supply



The US tuna supply chain is complex and it is changing. About 50% of the U.S. market is supplied from American Samoa where the majority of the raw material is delivered directly by U.S. flag purse seiners. The labor in Samoa is relatively expensive compared to Thailand and the Philippines, but the canneries enjoy tremendous economies of scale and they are able to efficiently produce canned tuna that is duty-free for the U.S. market.

Puerto Rico had been an important part of the U.S. tuna supply chain but high labor costs in combination with higher light meat raw material costs resulted in the closing of all but one of the plants there.

Actually, from a supply chain perspective, the closing of the plants in Puerto Rico is more interesting when considering albacore than light meat. The duty savings from production in Puerto Rico are higher on albacore than light meat. And one could argue that the cost of Indian Ocean and South Atlantic albacore delivered by carrier to Puerto Rico is cheaper than the cost delivered by container to alternate ports. The industry is now waiting to see how the U.S. supply chain for canned albacore will look.

2000 Imports by U.S. (tonnes)				
From	Canned Tuna	Tuna Loins	Frozen Tuna	Total
Thailand	79,928	7,706	32	87,666
Philippines	35,251	628	1,386	37,265
Ecuador	2,378	31,855	2,351	36,584
Indonesia	13,391	184	1,247	14,822
Taiwan	13	-	28,493	28,506
Other	10,998	6,929 ¹	22,198	40,125
Total	141,959	47,302	55,707	244,968
Source: U.S. Department of Commerce; National Marine Fisheries Service				

Loins play an important part of the US market for canned tuna. Bumble Bee's plant in California is the main user with controlled plants in Ecuador supplying most of the loins.

As you can see from the trade data, Mexico seems to be missing. Although the trade embargo on Mexican tuna has been lifted, the US brands and the majority of importers follow a policy of only purchasing from suppliers that are dolphin safe in accordance with the old definition (no intentional sets on dolphins, regardless of mortality or injury) Meanwhile, the North American Free Trade Agreement provides for progressive reduction and then elimination of the duty on canned tuna imported into the U.S. from Mexico. Should the dolphin issue be somehow resolved, we should expect to see Mexico becoming an important part of the U.S. tuna supply chain.

For purposes of discussion only, I am presenting what I believe to be representative costs of comparative supply chains. The intent is to show the trade-off between raw material, labor, and packaging, transportation costs for alternate sources of supply. First, we will look at the U.S. market.

Cost of Light Meat 170g x 48			
Assuming \$800/tonne Bangkok Market			
Cost	Thailand	Samoa	Mexico
Fish @ 85 cases per tonne	9.40	8.80	8.80
Variable Cost	1.00	1.00	1.00
Packaging	3.20	3.30	3.30
Direct Labor	.50	2.00	1.00
Overhead	.50	.50	.50
Sub-total	14.60	15.10	14.60
Duty (Rate)	12.5%	0%	5.8%
Duty per Carton	1.82	None	.85
Shipping	.75	.65	.50
Total	\$17.17	\$16.25	\$15.95

I assume that Samoa and Mexico have a \$50/tonne advantage on the cost of raw material as both receive the majority of their fish by direct delivery. Labor in Bangkok is cheaper than both Mexico and Samoa. Samoa has a significant advantage with no duty. Once the duty on Mexican products is eliminated under NAFTA, Mexico should be the low cost producer of tuna for the U.S. market. This cost advantage, coupled with its geographic advantage and the possibility for Mexican trucks to be allowed to deliver the products directly to retailers, will make Mexico an excellent tuna supply chain partner for the U.S. market.

¹ Includes Colombia 3,410 tonnes and Fiji 3,089 tonnes

The next table looks at the European market for canned tuna based on two different sources of supply: Ecuador and the Philippines.

Cost of Light Meat 185g x 48 Assuming \$800/tonne Bangkok Market		
Cost	Philippines	Ecuador
Fish @ 75 cases per tonne	\$10.00	\$10.67
Variable Cost	1.00	1.00
Packaging	3.30	3.30
Direct Labor	.50	.50
Overhead	.50	.50
Sub-total	15.30	15.97
Duty (Rate)	24.0%	0%
Duty per Carton	3.67	None
Shipping	1.00	.75
Total	\$19.97	\$16.72

I am assuming that the cost of raw material in Ecuador is equivalent to Bangkok and that Philippine packers pay less (\$50/tonne) than the Bangkok market. Shipping is assumed to be more expensive to Europe from the Philippines than from Ecuador. The big cost difference, however, is in duty PROVIDED that the fish has qualifying origin. Without the duty advantage, supply from Ecuador would be more expensive than from the Philippines.

Market Evolution

Raw material, duty and labor cost considerations are shifting Europe's tuna supply chain away from the Philippines and Thailand to Spain and Latin America. And loins are playing a major part in this shift.

2000 Tuna Imports (tonnes)			
Country	Canned Tuna	Tuna Loins	Total
Italy	42,793	27,256	70,049
Germany	46,408	71	46,479
France	19,035	13,230	32,265
UK	28,189	146	28,335
Spain	1,612	19,334	20,946
Total	138,037	60,037	198,074
Source: Eurostat			

The traditional canned tuna producing countries of Italy, Spain and, to some extent, France have the cannery infrastructure to allow them to substitute or augment the importation of round fish with loins. The loin-sourcing objective then becomes one of identifying potential loin plants that have lower raw material, labor and other production costs than the importer.

The supply chain is improved if costs, including inventory, are lowered without compromising reliability and integrity.

The market can then be expected to evolve as follows:

1. Domestic canning using local or imported catch
2. Importation of cooked loins for domestic canning
3. Importation of finished product

Economic factors will eventually drive the higher labor cost, mature canned tuna markets to import finished product from lower cost producers. The pace of this evolution, however, is unpredictable and even, in some cases, reversible. It depends on tuna market growth, raw material resources and external factors. Some of the factors that influence changes to or the evolution of the market are controllable. Others are not. For example, I submit that market growth is somewhat controllable. Factors like raw material, access to fishing grounds and duty regimes are less so. Together, we should cooperate with one another in ways that are permissible under anti-trust laws to influence and even manage these factors for the benefit of the tuna industry.

Thank you Mr. Chairman.

NOTAS / NOTES

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LA TEMPORADA DE LOS AZULES



Boquerón-Anchoa

Período de máximas capturas: de abril a julio.



Sardina

Período de capturas: todo el año.



Palometa-Japuta

Período de capturas: todo el año.



Caballa-Verdel

Período de máximas capturas: de mayo a octubre.



Jurel-Chicharro

Período de capturas: todo el año.



Atún

Período de máximas capturas: de abril a septiembre.



Bonito del Norte

Período de máximas capturas: de junio a septiembre.

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Los Pescados Azules, por supuesto.

Tan sanos, tan fáciles de preparar, tan sabrosos; un triunfo asegurado en tu mesa.

Aprovéchate y descubre nuevas maneras de cocinarlos.

Tu corazón, tu presupuesto y tu paladar te lo agradecerán. Si puedes disfrutar lo que mejor te sienta, más gusta a tu familia y más le conviene a tu salud ¿para qué elegir otra cosa?



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