

## Tuna Market Report – JANUARY 2010

### Strong exports of canned tuna from the Philippines

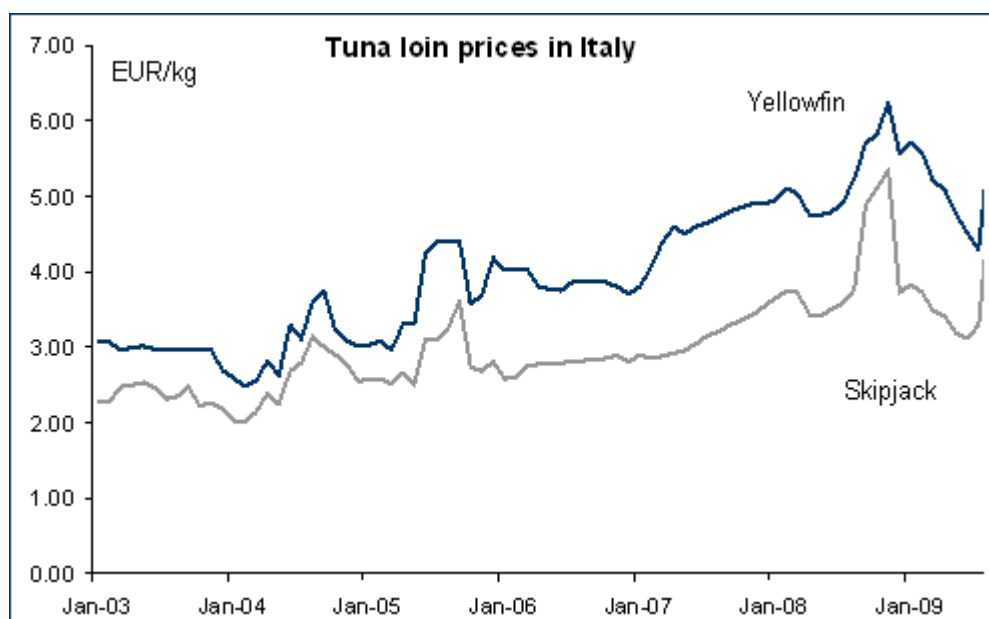
Filipino canned and preserved tuna is continuing to make inroads in European markets, with half-year customs figures confirming the trend evident from last year. There was a 45% increase in exports from the Philippines in 2009 with a major increase in sales to Germany - up 36%.

Imports Canned tuna: France						
	.....Jan-Dec.....			.....Jan-Jun.....		
	2006	2007	2008	2007	2008	2009
	(1000 tonnes)					
C. d'Ivoire	23.1	27.0	22.0	16.5	16.0	11.7
Spain	22.0	19.9	14.2	12.4	9.8	10.0
Madagascar	15.4	10.9	5.6	5.1	4.4	5.1
Seychelles	14.7	13.6	11.7	7.8	7.9	6.6
Italy	8.9	3.5	2.3	2.1	2.2	0.2
Senegal	1.1	1.7	0.9	1.0	0.5	0.9
Others	35.2	29.7	27.1	16.6	13.9	22.0
<b>Total</b>	<b>120.4</b>	<b>106.3</b>	<b>83.7</b>	<b>61.5</b>	<b>54.7</b>	<b>56.5</b>

Source: GLOBEFISH AH 11030

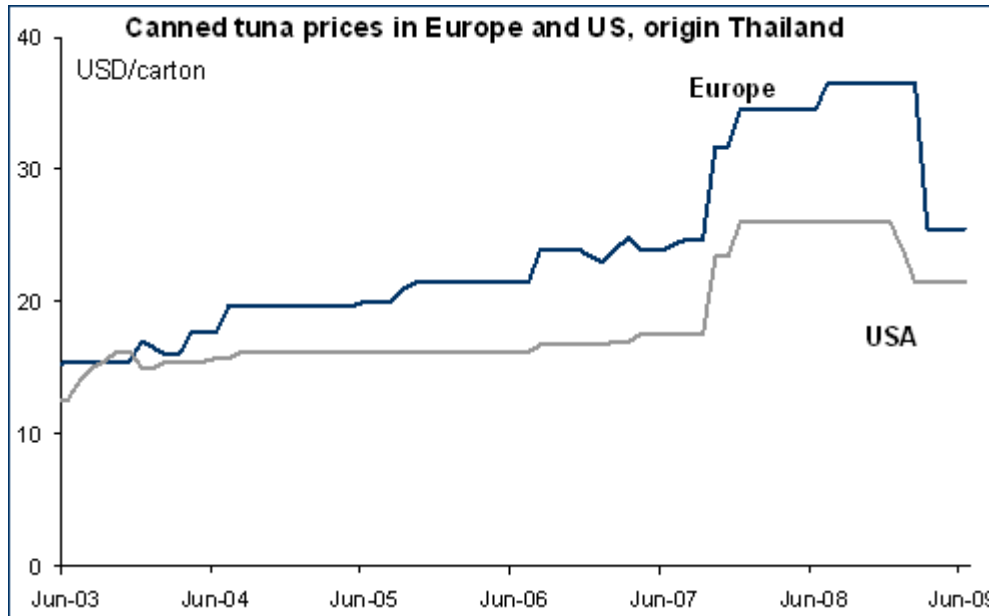
Canned tuna buyers have gained by lower prices, with Thai products being particularly attractive, owing to the declining strength of the baht. Lower prices - down between 20% and 33% - benefited major importers in Italy and Spain. Spanish canneries are moving to greater use of imported tuna loins, in order to reduce their domestic labour costs. Consequently, imports of frozen tuna loins expanded strongly in the first half of 2009, when 43 400 tonnes were imported, 63% more than in the same period of 2008.

### World tuna industry faces challenges in coming months



Monaco's proposal to list Atlantic and Mediterranean bluefin on CITES Appendix 1, which is expected to be discussed at the CITES meeting (CoP15) in March 2010, has caused much concern to the Japanese tuna industry. If this species is listed by CITES, the price of bluefin is likely to increase drastically. Traditionally

and historically, Japan has been the main market for bluefin, absorbing 80% of the global harvest. Canned tuna companies, too, expect that a decision to list bluefin tuna would have repercussions on canned tuna consumption. The average consumer is not aware of the different tuna species, or of the situation regarding different stocks and action to preserve one species will be regarded as applicable to all.



The implementation by the EU of measures to reduce Illegal, Unregulated and Unrecorded (IUU) fishing, by requiring a catch certification to accompany all fish imports, will have important consequences for the fish and tuna trade. This regulation will be put into practise on 1 January 2010, and many problems during the implementation process can be anticipated.

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