

The European market of the pikeperch for consumption

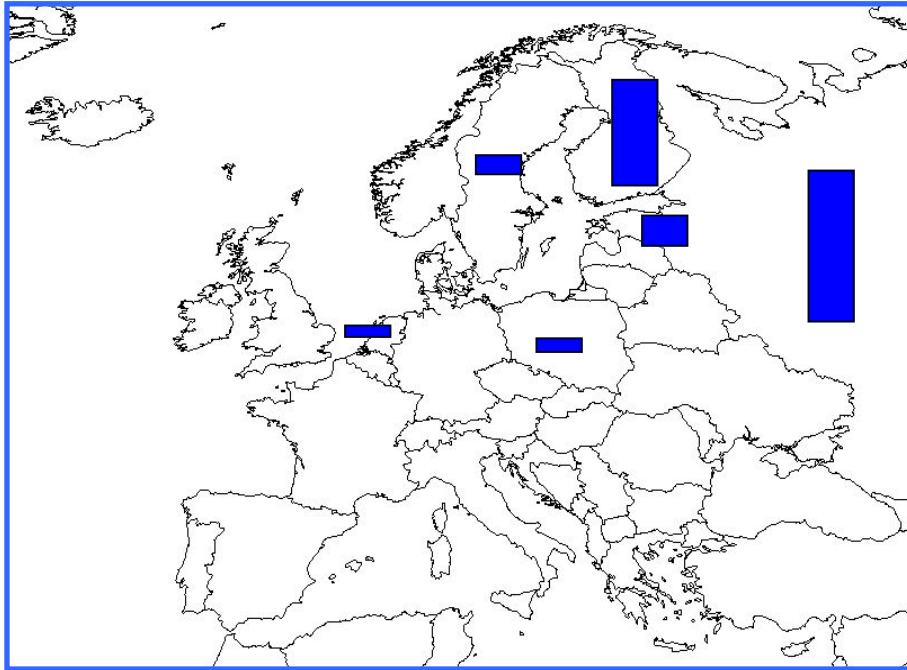
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European production of pikeperch by capture

Total production: 10 423 tons in 2005 (70%) ↓↓↓

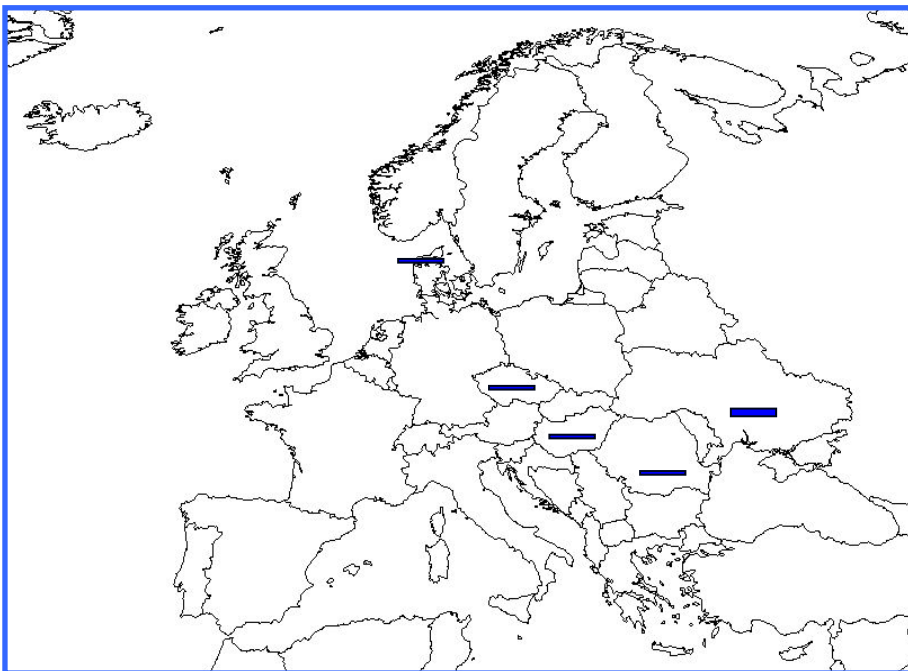


85% of the catches

Countries	Production (tons)
Russian Federation	4073
Finland	2805
Estonia	786
Sweden	525
Poland	357
Netherlands	302

European production of pikeperch by aquaculture

Total production: 239 tons in 2005 (73%) ↑↑↓



Countries	Production (tons)
Ukraine	67
Denmark	49
Czech Republic	47
Romania	32
Hungary	28

93% of the production

Extensive polyculture in ponds

Survey in 2002-2003 (*CRAFT Project Lucioperca*)

Goals:

1. Get an insight into the size and composition of pikeperch market (prices)
2. Get an impression of the market prospects for farmed pikeperch

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Statistical data on production and imports in the Netherlands

Production by capture

- Ijssellake: ~ 300 tons/year
- 3.4 to 4.7 € /kg
- No relation between prices and landed volume
- Fishing season peaks in September and October then decrease

Trade statistics

- Open border of the EU & no specific trade for pikeperch (mixed)
 - Estonia: fresh or chilled, mainly filleted
 - Russia: whole frozen
- 6000 to 5000 tons (1999-2002)
- Much lower prices => 2.1-2.4 € /kg
- Other countries (Germany, Denmark, Sweden & Finland)

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Interviews with Dutch pikeperch traders and processors (4)

Prices for inland fish vary:

<u>3 size classes</u>		<u>Wholesale prices</u>
0.7-1 kg	→	3.5 € /kg
1-2 kg	→	4-7 € /kg
2-4 kg	→	8 € /kg (restaurants)

Prices for imported fish are generally much lower

Conclusions:

- Seasonal variation of quality for inland (summer)
- Demand usually low in summer ≠ high in holidays
- Some variations of prices during the year ≠ not

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Most ready to buy farmed pikeperch

- Stable prices
- Constant quality (look like the wild fish from Ijssellake)
- Constant supply

Sizes requested

- All
- 1-2 and 2-4 kg preferred

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5 traders and retailers : send samples of farmed pikeperch

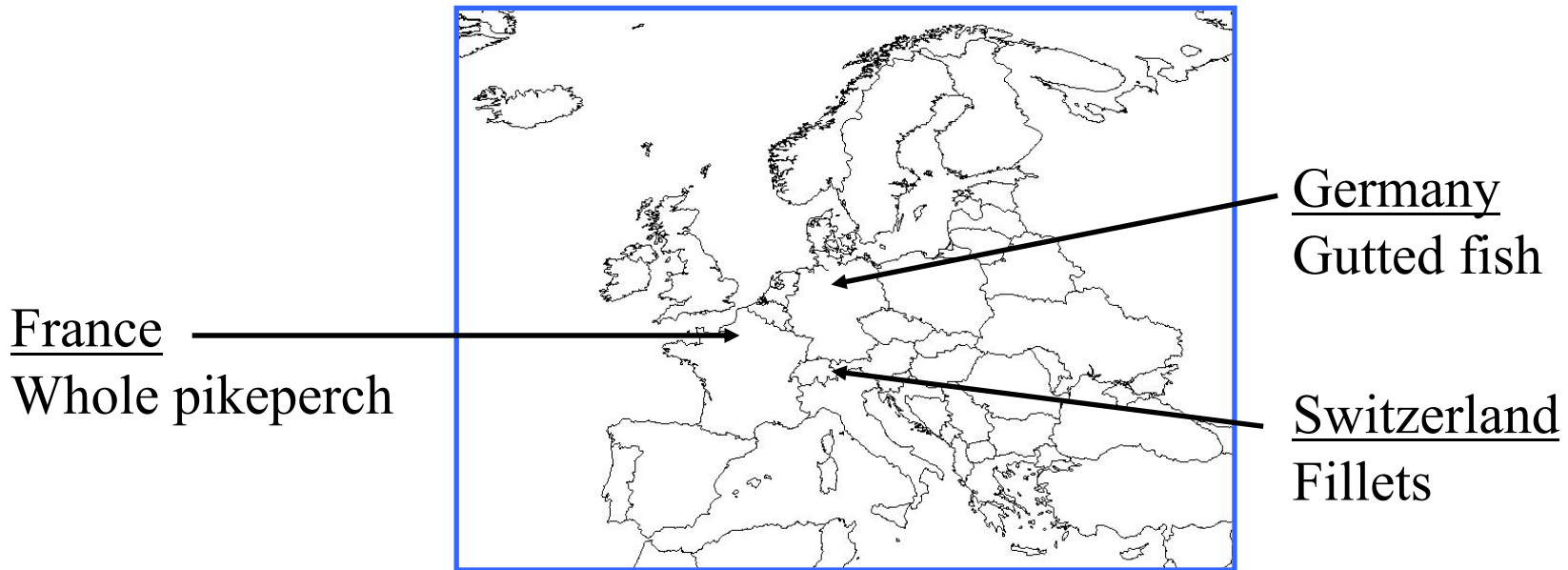
- Two wholesalers of quality fish in Boulogne-sur-Mer (Fr)
- Famous restaurant in Paris (Fr)
- Distributor to famous restaurant in Brussel (B)
- Small distributor in Brussels (B)

Conclusions:

- Taste has to be improved
- Freshness OK
- Preferred wild vs farmed
- Price less important if size > 1.5 kg

Situation market for pikeperch in 2007

Catches of wild pikeperch continue to decrease worldwide (Estonia)



Market keeps asking for the 2-4 kg
Almost never reached with farming

Farming takes place

❖ Holland (2 farms)

❖ Denmark (2 farms)

The 4 main advantages of farmed pikeperch

1. A higher quality because it can be fresher than wild pikeperch
2. A better determination of the periods of sales
 - ❖ At Christmas
 - ❖ Easter
 - ❖ Other holidays
3. A better yield in filleting
 - ❖ No food (smelt, roach, bream...) in stomach
4. For supermarket chains to develop special periods of sales
 - ❖ Promotions

Problems with wholesalers

Because of big quantities of farmed fish

Salmon



Trout



Bass



Some wholesalers are suspicious about quality

- Afraid that the fish will be too small
- Wild fish last longer in general
- To complete the farming with food similar to wild
=> To prevent oil taste or soft fillets

Fluctuations of prices for wild pikeperch!

In October 2002

Enormous drop of price for wild pikeperch

- ❑ Overfishing: imports from eastern countries were huge
- ❑ Bad market situation

Only the price of pikeperch of 2-4 kg remained stable

- ❑ Capture low in Ijssellake

In October 2007

❑ 0.7-1 kg => 4 € /kg

❑ 1.0-2 kg => 6 € /kg

❑ 2.0-4 kg => 9 € /kg

Fishing stopped in Holland => Price 3 € /kg

Conclusions

- ❑ These fluctuations => economic results of farming pikeperch
- ❑ To avoid low prices => promote the product farmed pikeperch
- ❑ A selling price for farmed => 4-7 € /kg

Recommendations for marketing

- ❑ Special mark on each fish or box => speciality (farmed/wild)

- ❑ As soon as the quantity of 2-4 kg is considered enough
=> send samples to the wholesalers all over Europe

- ❑ A thorough investigation
 - ❖ Restaurants
 - ❖ Dealers
 - ❖ Supermarkets

What the market really wants!

Farmed products can be very tasteful and good

Good texture
Size: 2-4 kg

Firmness
Freshness



Shelflife
Good marketing

Fair price
Economic farming

Future...

Strategy of the European commission:

- Saving wild fish
- Development of aquaculture

The fisherman who lost their jobs => boosting fish farming

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Thank you for your attention

