The European market of the pikeperch for consumption

Hein Dil¹ & Fabrice Teletchea²

UR AFPA, Team “DAC”, Nancy Université, 34 Rue Sainte Catherine, 54 000 Nancy
European production of pikeperch by capture

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

<table>
<thead>
<tr>
<th>Countries</th>
<th>Production (tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russian Federation</td>
<td>4073</td>
</tr>
<tr>
<td>Finland</td>
<td>2805</td>
</tr>
<tr>
<td>Estonia</td>
<td>786</td>
</tr>
<tr>
<td>Sweden</td>
<td>525</td>
</tr>
<tr>
<td>Poland</td>
<td>357</td>
</tr>
<tr>
<td>Netherlands</td>
<td>302</td>
</tr>
</tbody>
</table>

85% of the catches

FAO, 2007
European production of pikeperch by aquaculture

Total production: 239 tons in 2005 (73%)

<table>
<thead>
<tr>
<th>Countries</th>
<th>Production (tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ukraine</td>
<td>67</td>
</tr>
<tr>
<td>Denmark</td>
<td>49</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>47</td>
</tr>
<tr>
<td>Romania</td>
<td>32</td>
</tr>
<tr>
<td>Hungary</td>
<td>28</td>
</tr>
</tbody>
</table>

93% of the production

Extensive polyculture in ponds

FAO, 2007
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
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

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)
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

Interviews with Dutch pikeperch traders and processors (4)

Prices for inland fish vary:

<table>
<thead>
<tr>
<th>3 size classes</th>
<th>Wholesale prices</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.7-1 kg</td>
<td>3.5 € /kg</td>
</tr>
<tr>
<td>1-2 kg</td>
<td>4-7 € /kg</td>
</tr>
<tr>
<td>2-4 kg</td>
<td>8 € /kg (restaurants)</td>
</tr>
</tbody>
</table>

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
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

   Interviews with Dutch pikeperch traders and processors (4)

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
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

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)

France
Whole pikeperch

Germany
Gutted fish

Switzerland
Fillets
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
The European market of the pikeperch for consumption

Hein Dil¹ & Fabrice Teletchea²

UR AFPA, Team “DAC”, Nancy Université, 34 Rue Sainte Catherine, 54 000 Nancy

Thank you for your attention