

Estado y Tendencias del Mercado Mundial

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Code of Conduct for Responsible Fisheries

20 Year Anniversary



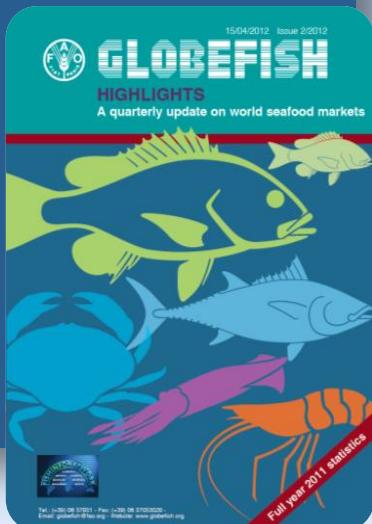
GLOBEFISH

Globefish Highlights

GLOBEFISH Highlights

A quarterly update on
World seafood markets

Presents key market
data with written
analysis of trends
and key events and
news affecting
various commodities



European Price Report

European Price Report

The European Fish Price Report, based on information supplied by price correspondents, aims to provide guidance on broad price trends. Price information is indicative and should be used only for forecasting.

FAO GLOBEFISH
EUROPEAN PRICE REPORT

Issue 10/2012
October 2012

INDEX FOR PRICES

| | |
|-------------------------|----|
| Groundfish | 10 |
| Flatfish | 11 |
| Tuna | 12 |
| Small Pelagic | 13 |
| Cephalopods | 12 |
| Crustaceans | 13 |
| Whelks | 14 |
| Solemon | 15 |
| Torsk | 19 |
| Feedwater fish | 20 |
| New Traditional species | 16 |
| Seafood Healthwear | 27 |

LATEST TRENDS

Demand is weak in most markets, with prices under pressure. This underlying demand is not expected to bounce back in the near future, even though there is a seasonal demand peak during the holiday season at the end of the year.

On the supply side, however, there is some encouraging news. The stock situation for bluefin tuna is reportedly much better than a year ago and record catches were reported slightly last year for cod in the Arctic. A record quota has been allocated for 2013 with more than 1 million tonnes shared between Norway, Russia and third countries.

For European farmed fish, supplies for some species could drop somewhat next year as producers are reported to stock at the same levels as this year, because of the uncertain market. This could lead to further price rises during next year for bass and bream, as well as turbot and salmon.

GROUNDFISH

Cod - In Germany (kg) Price/tonne

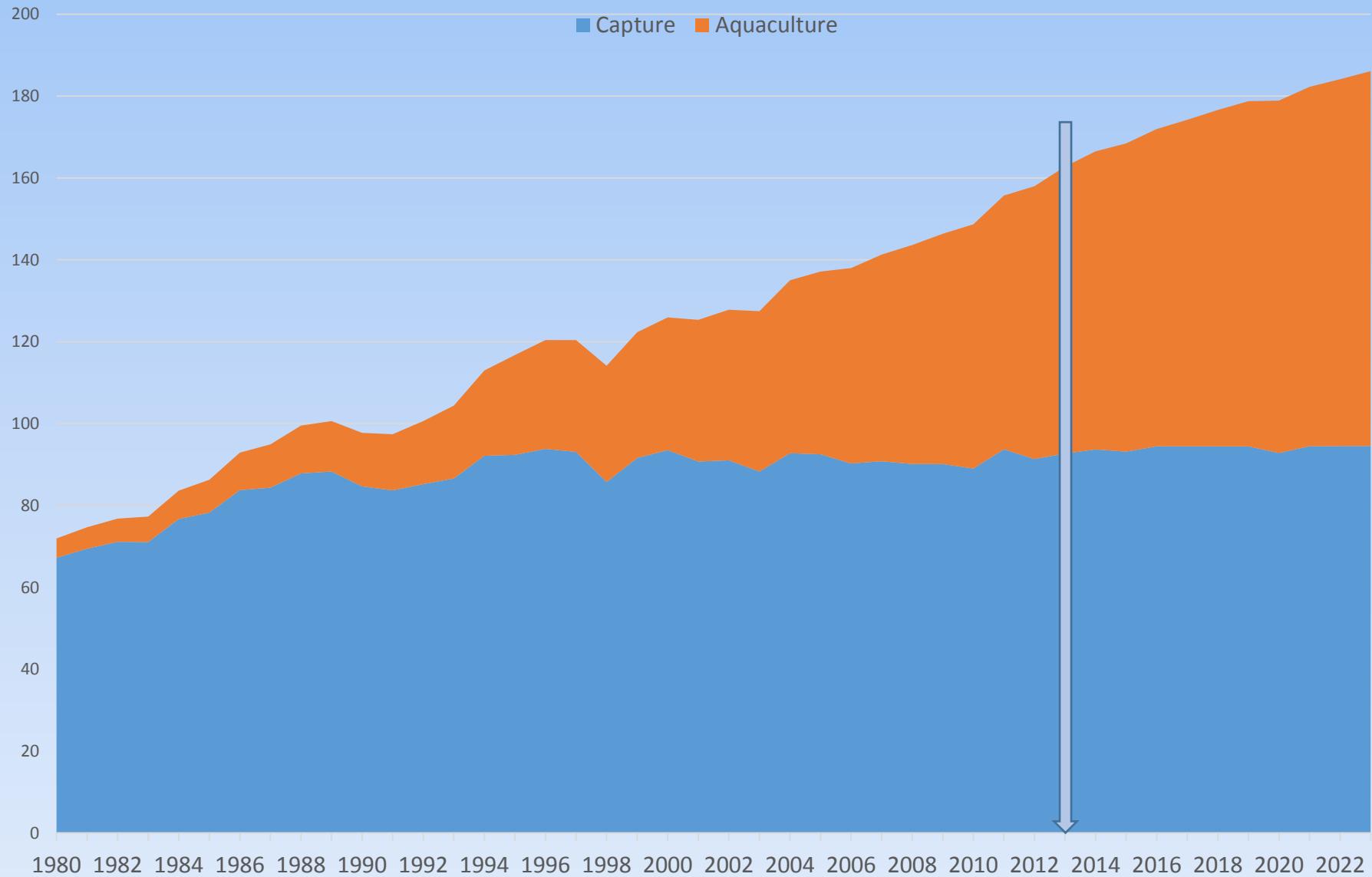
British sole prices continue to climb. That North Sea cod catch is not sustainable following a recent survey showing that catches in Northern Europe are not only not sufficient, but also

Provides details of current market prices for over 600 fish products through information from an extensive network of price correspondents

PRODUCCIÓN

Producción Mundial de Pescado: 1980 - 2023

OECD-FAO Agricultural Outlook 2014



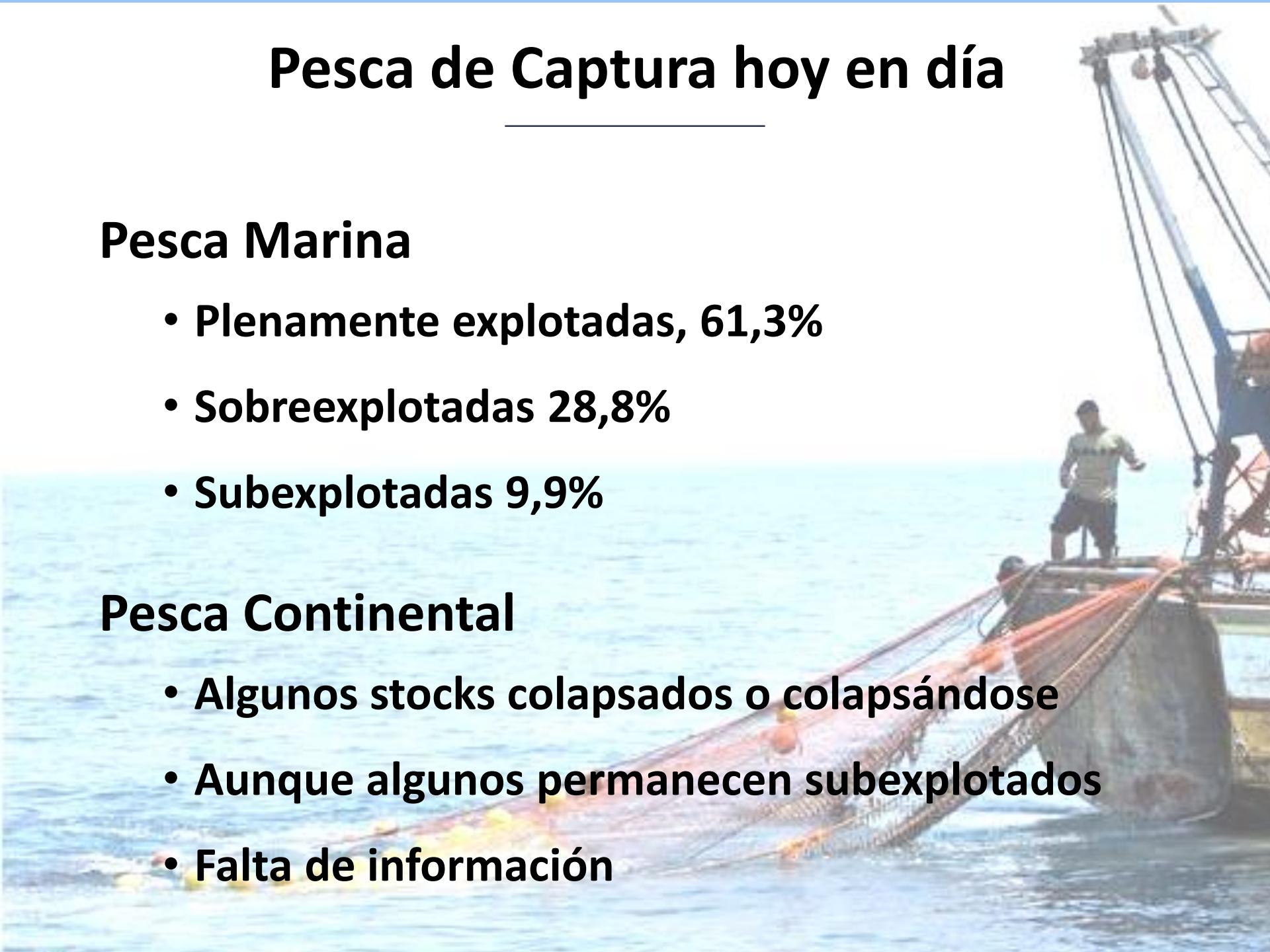
Pesca de Captura hoy en día

Pesca Marina

- Plenamente explotadas, 61,3%
- Sobreexplotadas 28,8%
- Subexplotadas 9,9%

Pesca Continental

- Algunos stocks colapsados o colapsándose
- Aunque algunos permanecen subexplotados
- Falta de información



El crecimiento de la acuicultura

Que significa para...

Mercado Productos y Precios

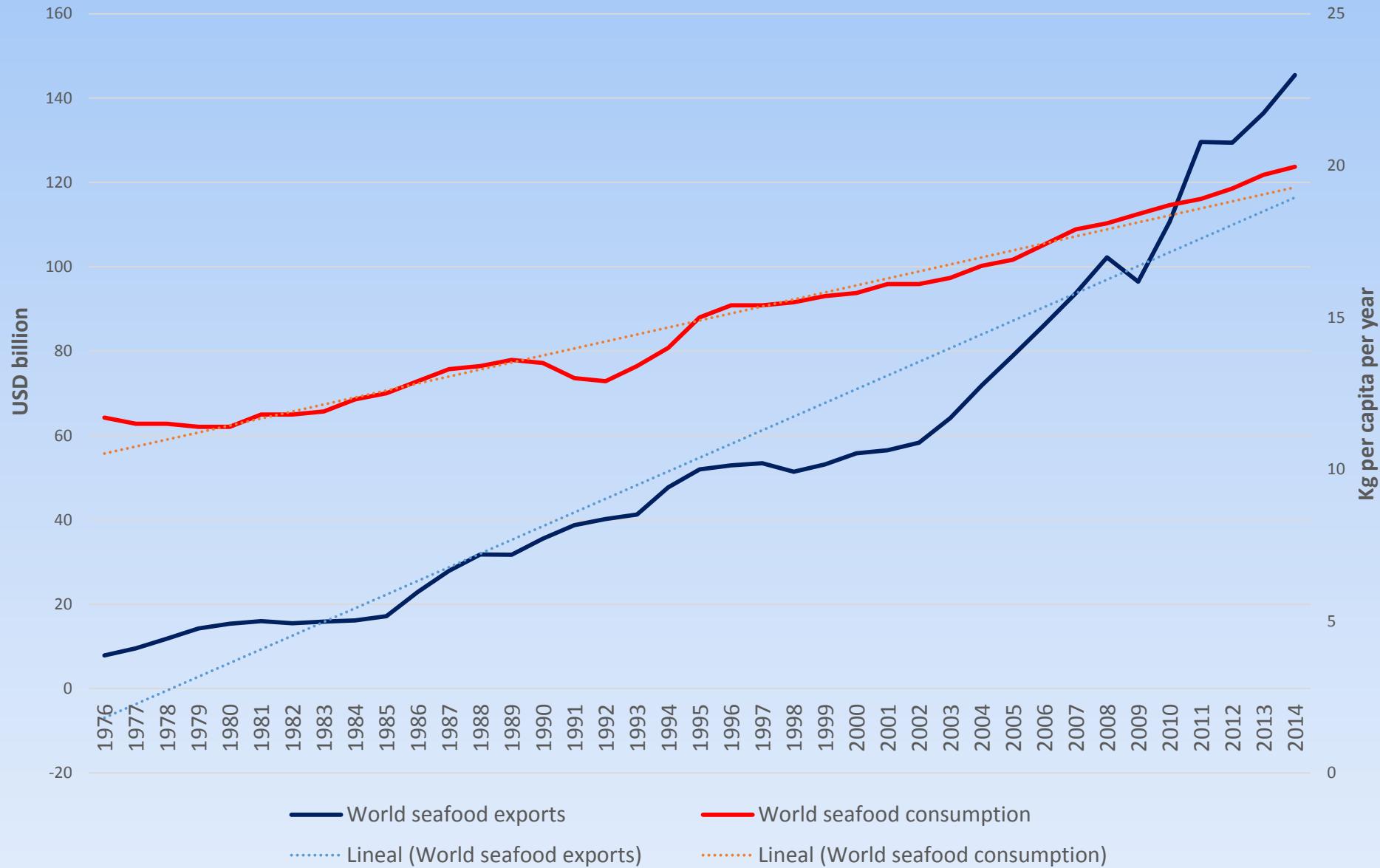
Trazabilidad y Certificación

Pescado y Nutrición

COMERCIO Y MERCADOS

Globalización en una Gráfica: exportaciones mundiales de pescado vs media mundial de consumo de pescado

1976 a 2014



La Globalización de Productos Pesqueros

A que se debe?

Demanda de pescado

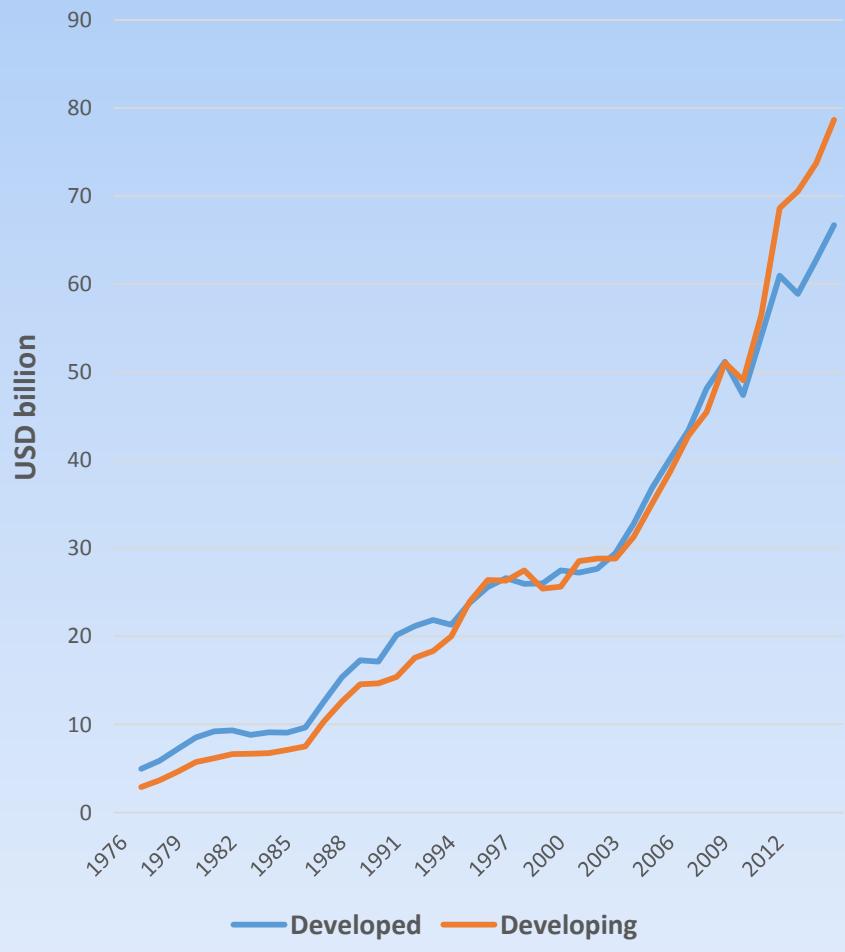
Interconexión global

Mejora en logística

Externalización del procesado

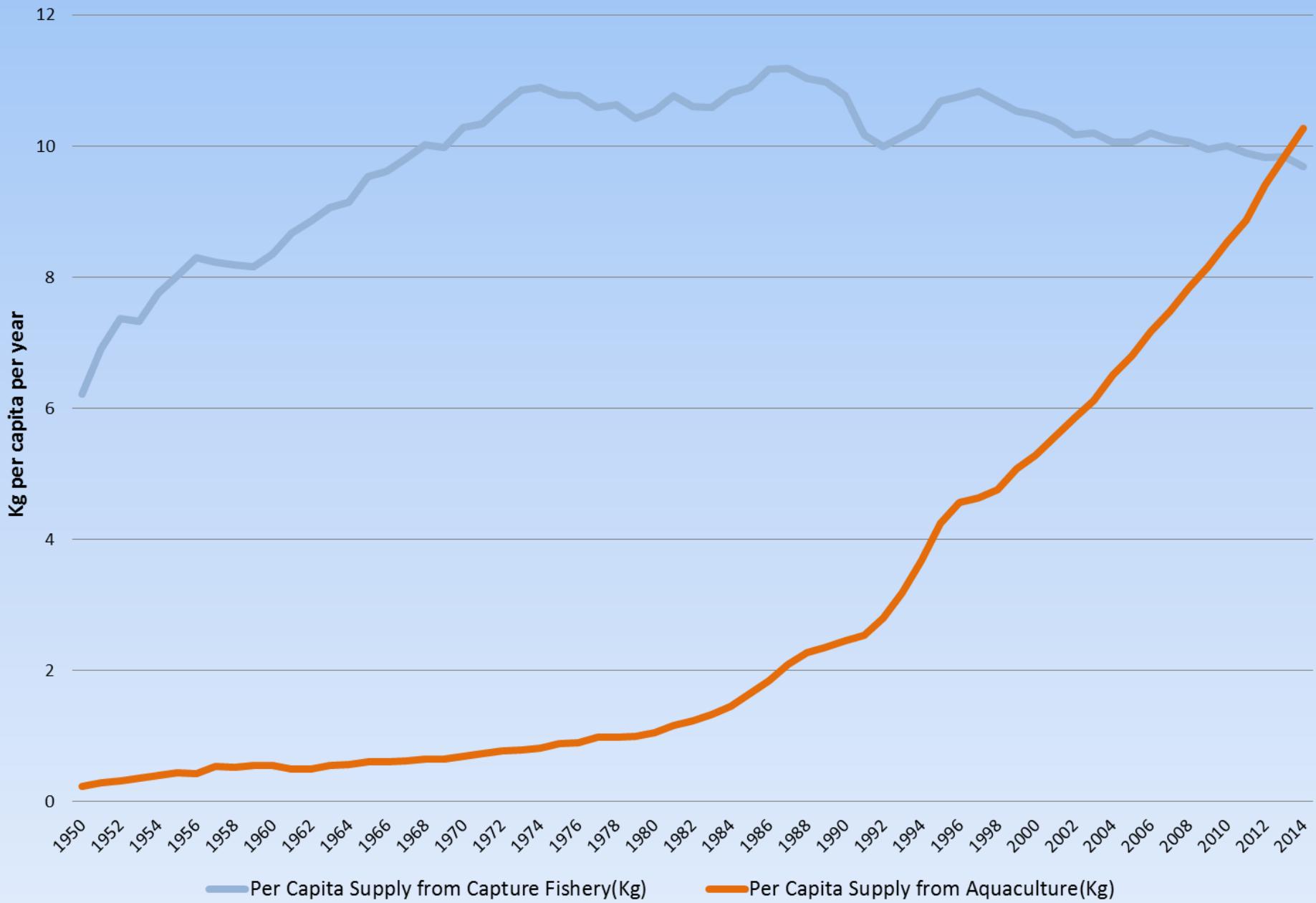
Comercio Mundial de Productos Pesqueros: desarrollados vs en desarrollo

Importaciones vs Exportaciones



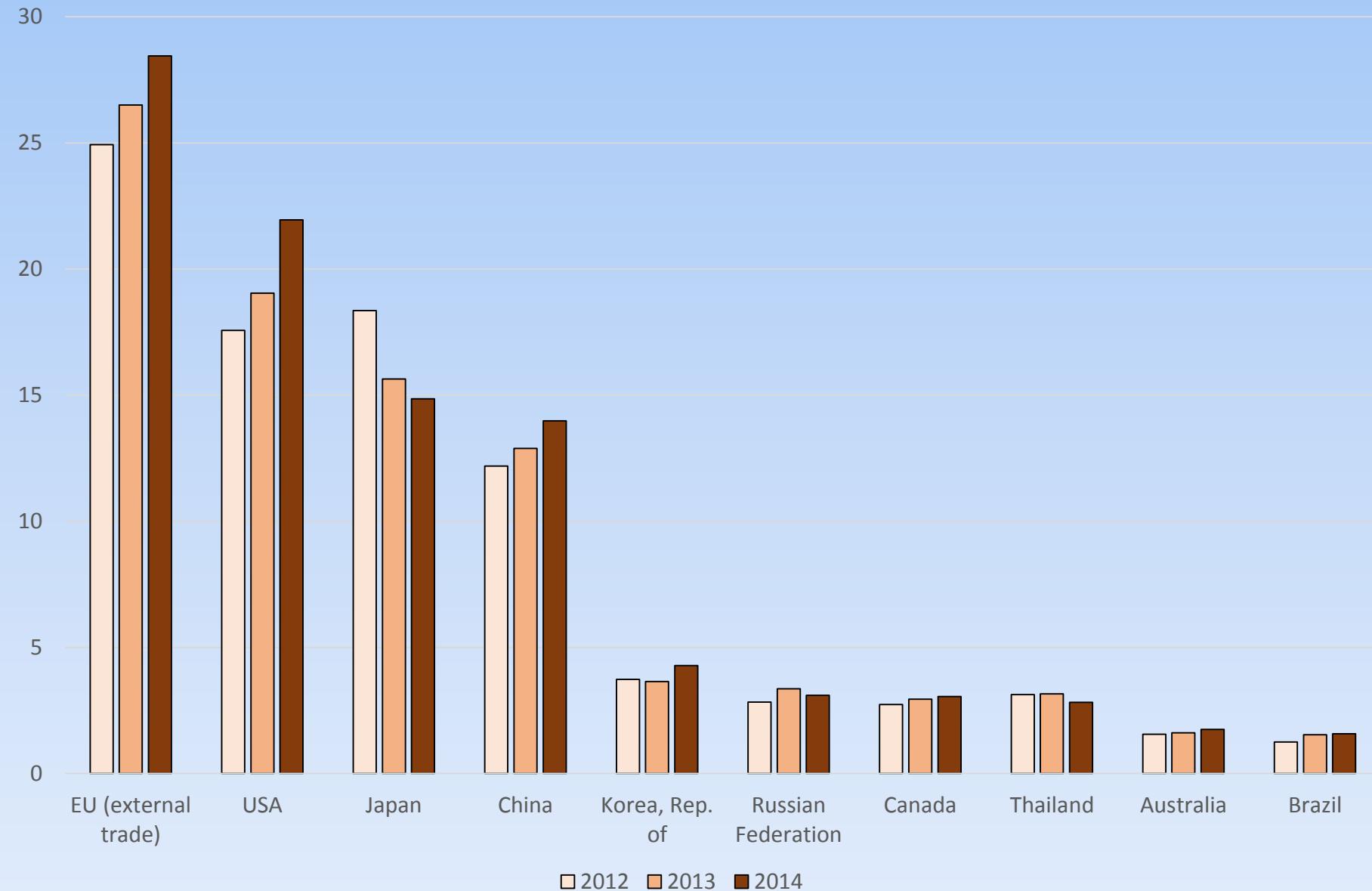
Per capita fish supply for human consumption

1950 to 2014



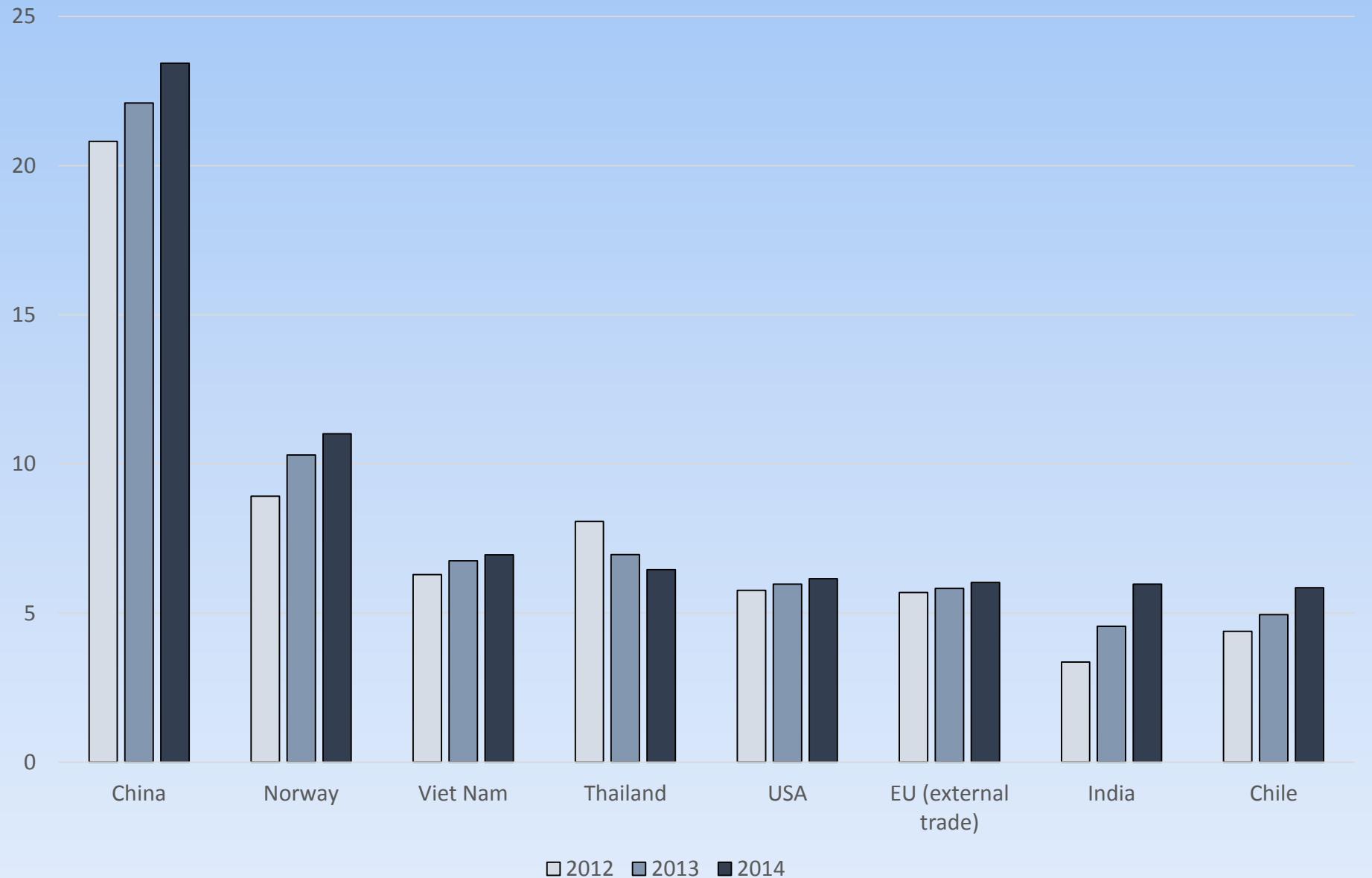
Principales importadores de pescado

– últimos tres años



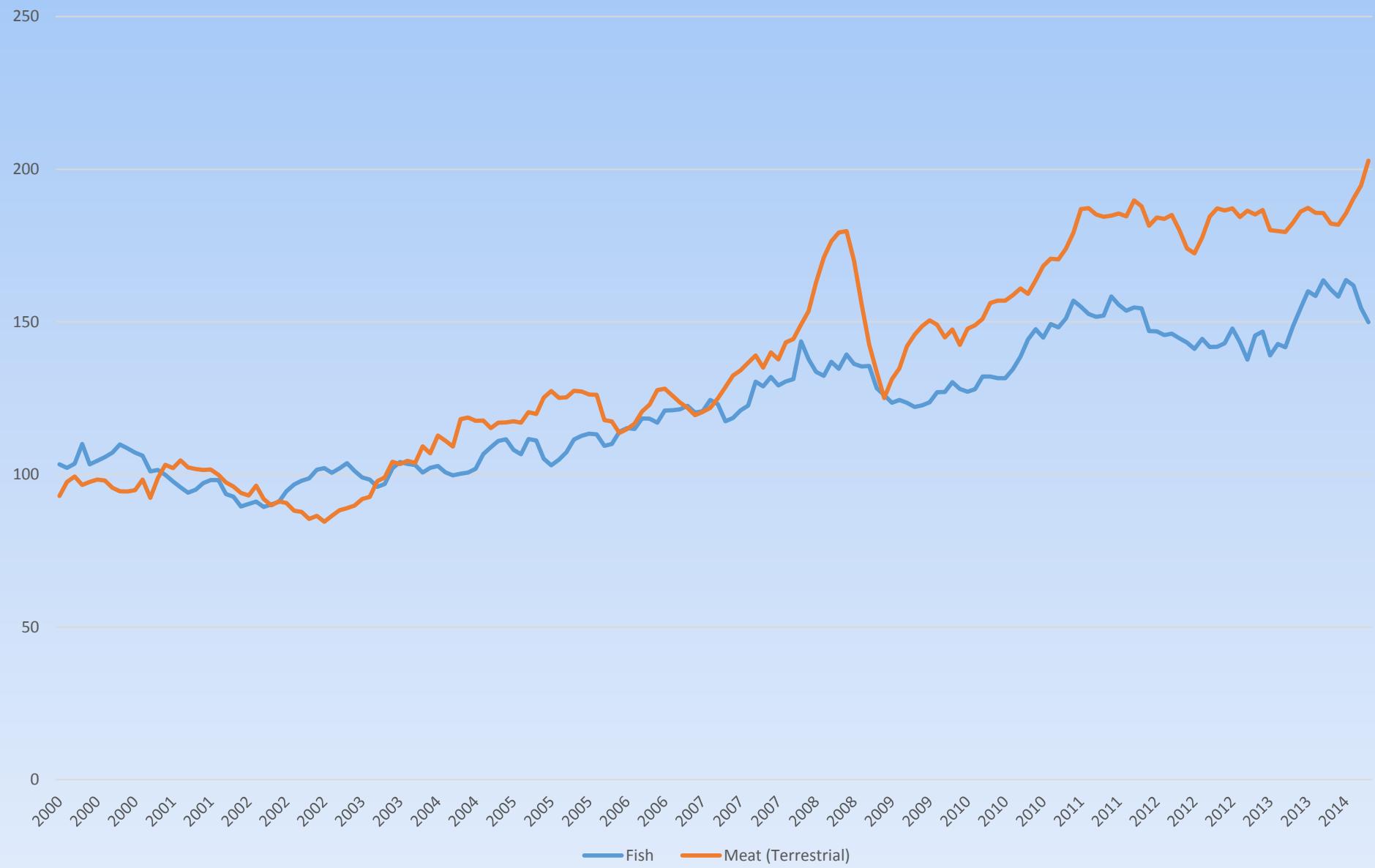
Principales exportadores de pescado

– últimos tres años



Índice de precios carne vs pescado

Enero 2000 - Junio 2014



CUESTIONES RELEVANTES PARA EL COMERCIO PESQUERO

Trazabilidad

Pesca Ilegal (INDNR)



Inocuidad



Etiquetados

Sostenibilidad

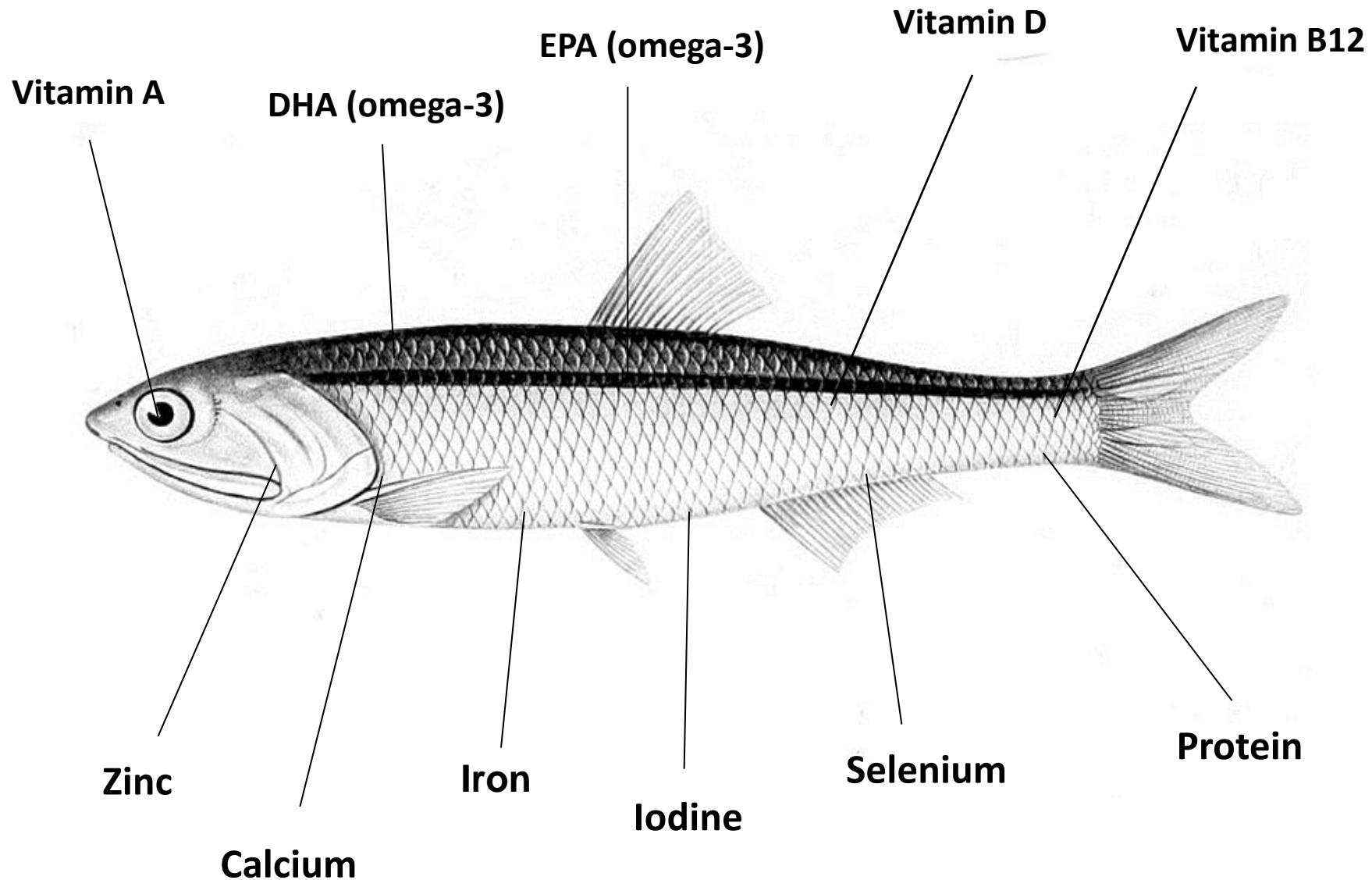
- **Medioambiental**
- **Social**
- **Económico**

Conexión transparente

Propio sello (nacional)

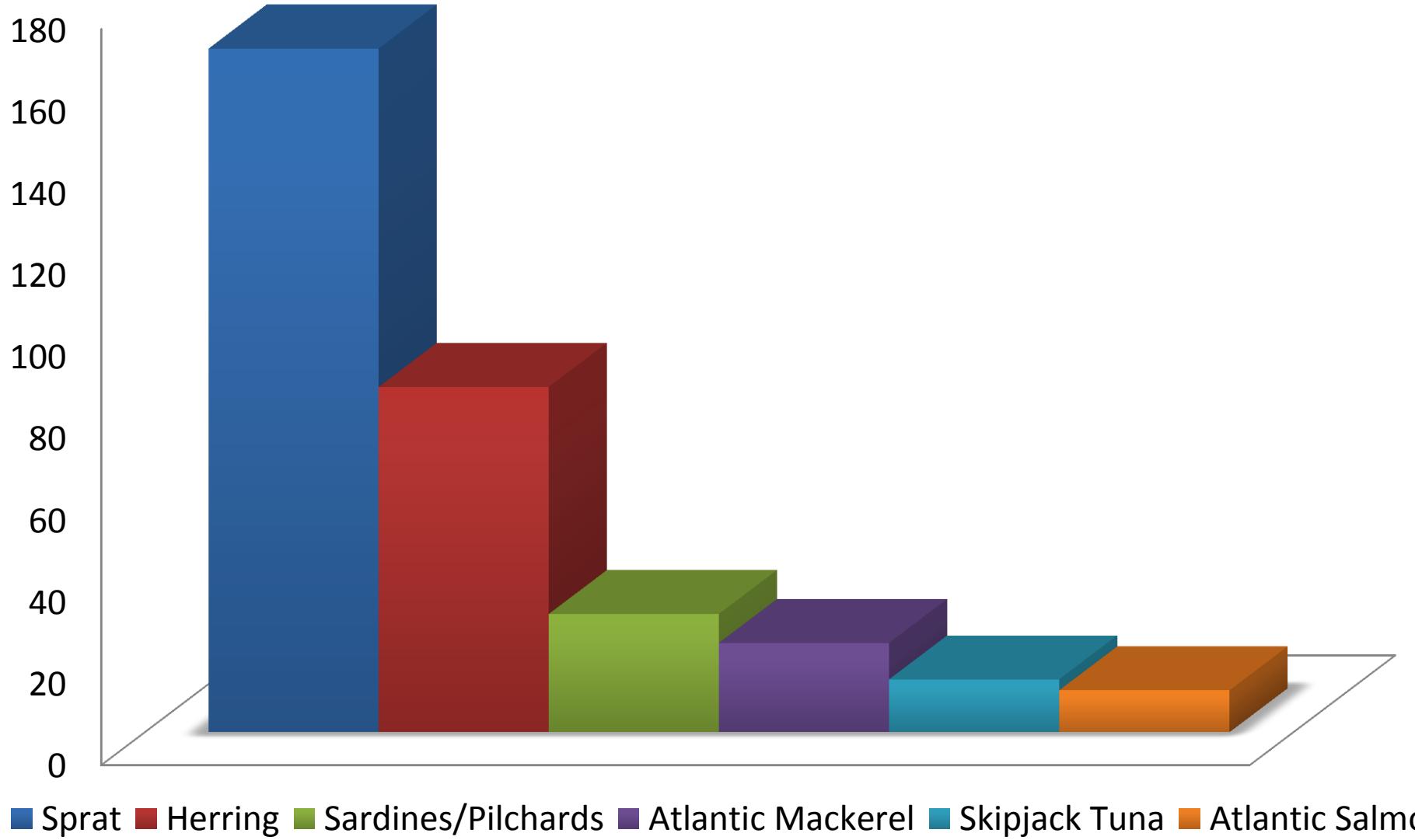


Nutrición



Dosis diarias de Omega-3 por USD

2012, precios -mayorista



Comparación de niveles Omega-3 en pescados y otras carnes

| | | Salmon, cultivo | Salmon, captura | Carpa, común | Tilapia | Pollo | Rez |
|--------------------|---------|--------------------|--------------------|-----------------|---------|-------|-----|
| Proteinas | g/100g | 20 | 20 | 18 | 20 | 19 | 21 |
| Lipidos | g/100g | 13 | 6.3 | 5.6 | 1.7 | 15 | 12 |
| Aqua | g/100g | 65 | 69 | 76 | 78 | 66 | 65 |
| Ceniza | g/100g | 1.1 | 2.5 | 1.5 | 0.9 | 0.8 | 1.0 |
| DHA + EPA (ω-3) | mg/100g | 1966 | 1436 | 350 | 91 | 40 | 3 |

GRACIAS

www.globefish.org