



A Business in Transition

October 2, 2009

➤ **EU PROCESSORS AND
IMPORTERS AIPCE-CEP**

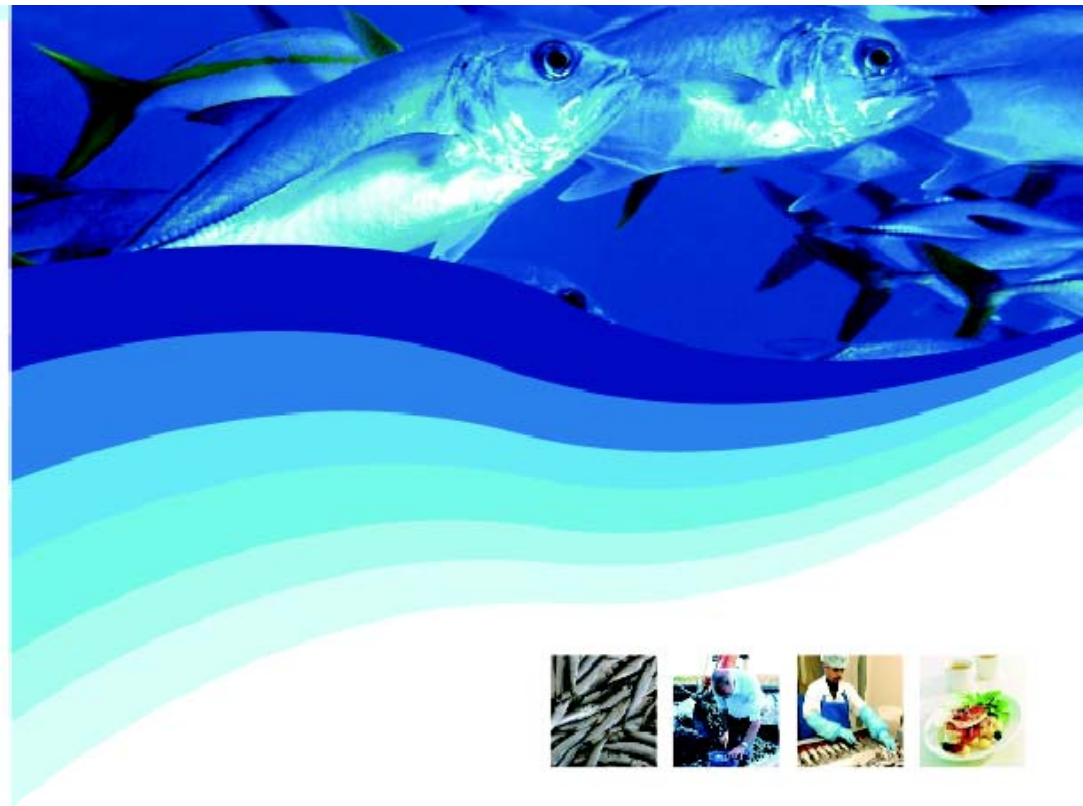
Guus Pastoor, President

AIPCE-CEP MEMBERS

BELGIUM	
	Fjord Seafood Producers
	Beroepsvereniging der Visgroothandelaars van België
DANEMARK	
	Association of Danish Fish Processing Industries and Exporters
FINLAND	
	Finnish Fish Processors' Association
FRANCE	
	Association Des Entreprises de Produits Alimentaires Elaborés
	Syndicat National du Commerce Extérieur des Produits Congelés et Surgelés
	Union du Maréyage Français
GERMANY	
	Bundesverband der Deutschen Fischindustrie und des Fischgrosshandels
IRELAND	
	The Irish Fish Processors and Exporters Association
ITALY	
	Associazione Nazionale Conservifici e di Tonnare
	Associazione Italiana Industrie Prodotti Alimentari - Fish Products Section

NETHERLANDS	
	Visfederatie
POLOGNE	
	Polish Association of Fish Processors
PORTUGAL	
	Associação Nacional dos Industriais de Conservas de Peixe
	Associação da Indústria Alimentar pelo Frio
SPAIN	
	Asociación Nacional de Industrias de Elaboración de Productos del Mar
	Asociación Nacional de Fabricantes de Conservas de Pescados y Mariscos
	Asociación Española de Importadores Mayoristas de Alimentos de Mar
	Asociación Española de Mayoristas, Importadores, Transformadores y Exportadores de Productos de la Pesca y Acuicultura
SWEDEN	
	Fiskeranschens Riksförbund
UNITED KINGDOM	
	Food & Drink Federation Seafood Group

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EU Fish Processors Association
EU Federation of National Organisations
of Importers and Exporters of Fish

AIPCE-CEP 



EU Production and Trade

- EU production 4.4 mio tons
- Imports 9.7 mio tons
- Available 14.1 mio tons



AIPCE-CEP INITIATIVES

- Control instructions Barents Sea
- Control Instructions Baltic Sea
- Letter of Warranty
- Model for third party audits
- Position paper on IUU
- Salmon Round Table



www.aipce-cep.org

- Documents
- More information about us



Some relevant trends

- global fish sourcing
- growing demand
- sustainable purchasing protocols
- market realities



THE SOURCING OF FISH

- Frozen species for the processing industry: volume, price, third country imports, secondary processing
- Fresh species for processing industry: fresh fillets, smoked fish, prepared products
- Frozen final product for wholesale/catering/retail
- Fresh whole fish for retail/catering

North Sea cod fishing ban urged

A complete ban on cod fishing has again been recommended by experts until severely depleted stocks recover.



Cod stocks will not make a full recovery even with a total ban

The International Council for the Exploration of the Sea (Ices) has said there should be a total ban for 2007.

Ices' Advisory Committee on Fishery Management (ACFM) said a zero catch was needed for the next two years for North Sea stocks to reach target levels.

Last chance for European cod

16:48 13 June 2003
NewScientist.com news service
Debra MacKenzie

Cod fishing in northern Europe must be totally abandoned, because fish populations are on the brink of collapse, say the scientists who advise the European Commission.

Their warning is the strongest warning yet - if fishing does not stop, and stay stopped for up to 12 years, the fishery will be destroyed.

The Commission issued a rescue plan for the cod stocks in May, and asked the International Council for the Exploration of the Seas, based in Copenhagen, Denmark, to evaluate it. The plan's key proposal is to reduce the number and power of fishing boats fishing the North Sea, Irish Sea, Kattegat and west of Scotland, where stocks are most endangered.

From The Times

October 18, 2006

The end of cod

- **Scientists demand ban on North Sea cod fishing**
- **Years of tougher quotas have failed to revive stocks**



By Anthony Browne, Chief Political Correspondent and Lewis Smith, Environment Reporter

A COMPLETE ban on cod fishing is the only way to prevent the species from dying out in the North Sea, scientists said last night.

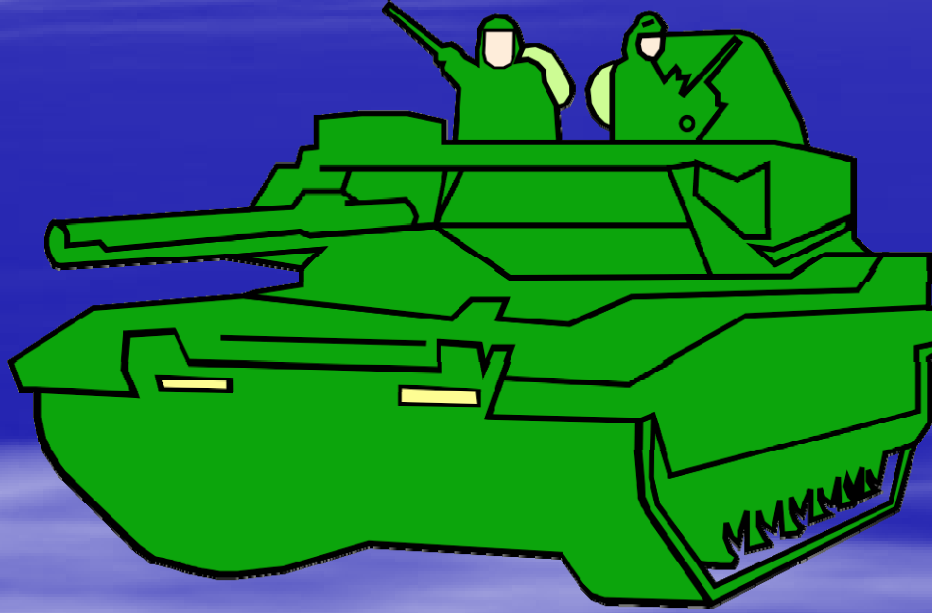
The much-trumpeted European rescue plan for cod is failing, the official committee of European fisheries experts will tell governments on Friday. Stocks of cod - Britain's favourite fish - are still so depleted in the seas around the UK that there should be a complete ban on catching the fish throughout next year.



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A Clear Message Is Missing



- The image of EU wild caught fish is under severe fire, and so is the credibility of the Common Fisheries Policy.
- EU aquaculture seems to lack image



The concept of sustainability of fish is not shared by all stakeholders

- That's one reason for mixed information reaching the market.
- Buyers start looking for their own concept.
- A clear communications authority is missing.





AIPCE-CEP position on CFP

- Focus on self regulation and control by fishermen's organisations -Eliminate overcapacity –Commission's Greenpaper addresses the points, but..
- Misunderstanding of functioning of the market CMO and Control regime are connected to CFP



Thank you for your attention