Market for carps in Europe and types of products

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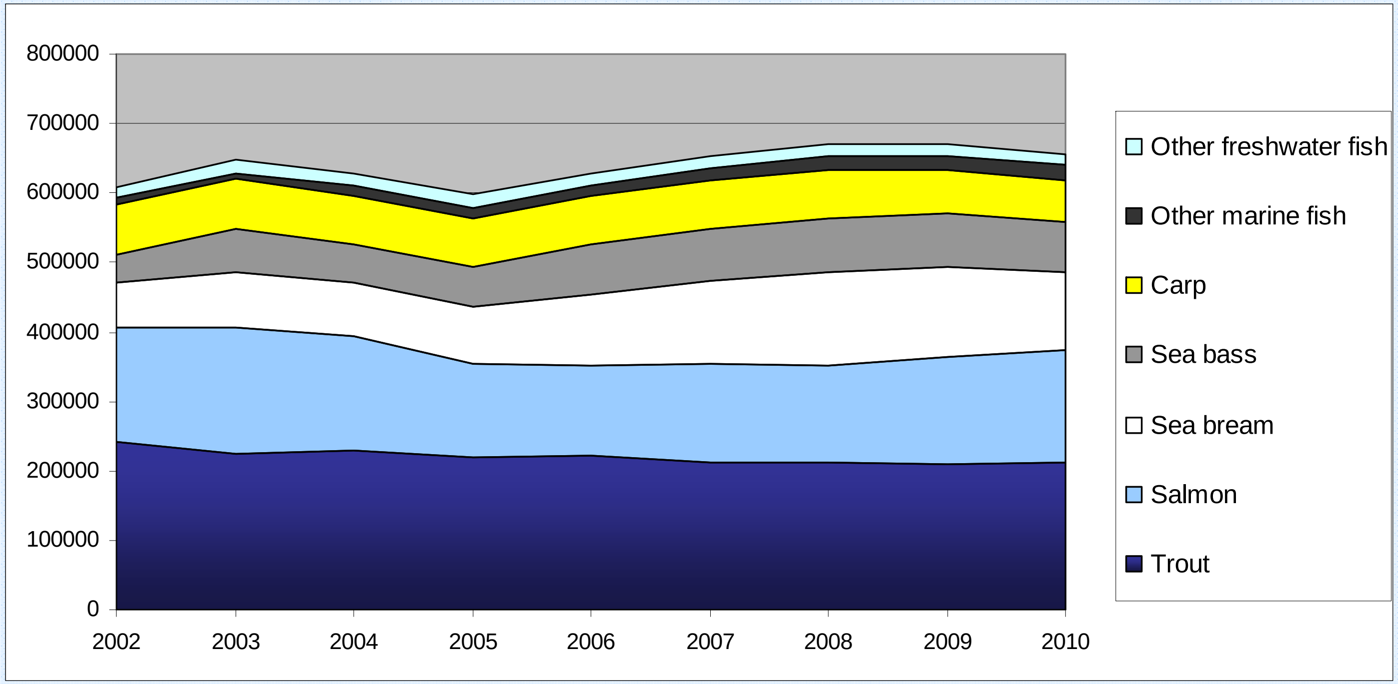
Structure of the presentation

- Overview of carp market in the EU
- Production and development of prices
- Demand and obstacles for carp products
- Case study of innovative equipment
- Promotional campaigns
- Conclusions

Carp market in the EU

Development of aquaculture production in the European Union (in tonnes) by groups:

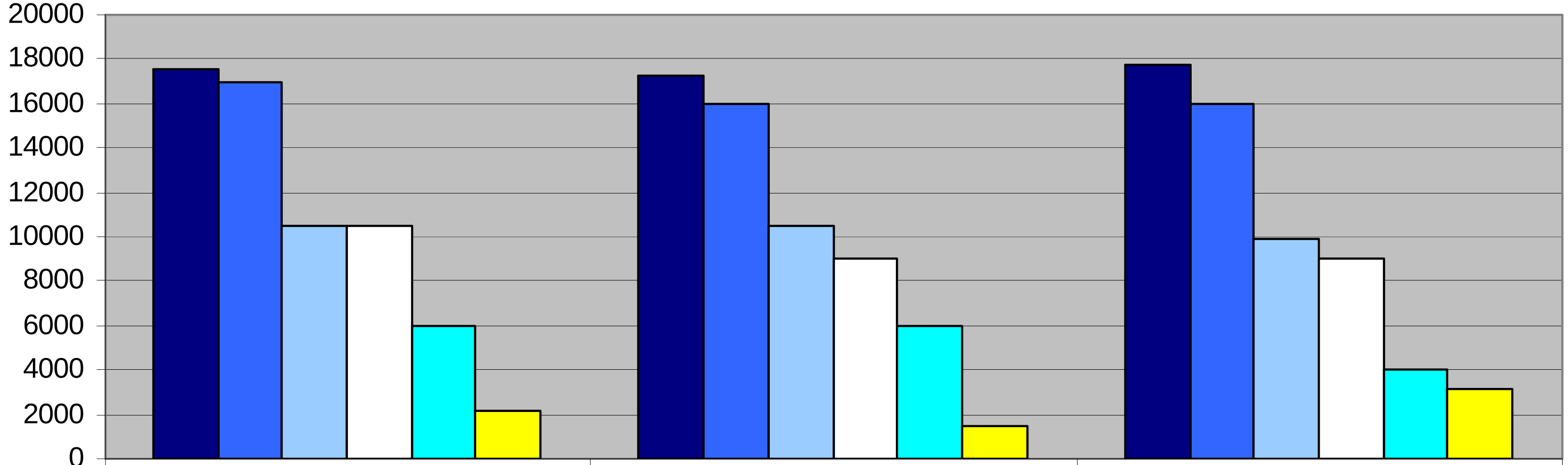


	European countries	EU countries
Total aquaculture output (tonnes)	1 800 000	665 302
Carps (tonnes)	64 061	60 861
Carp %	3,5%	9%

Common carp – 94%, Silver carp – 4%, Grass carp – 2%

Carp market in EU

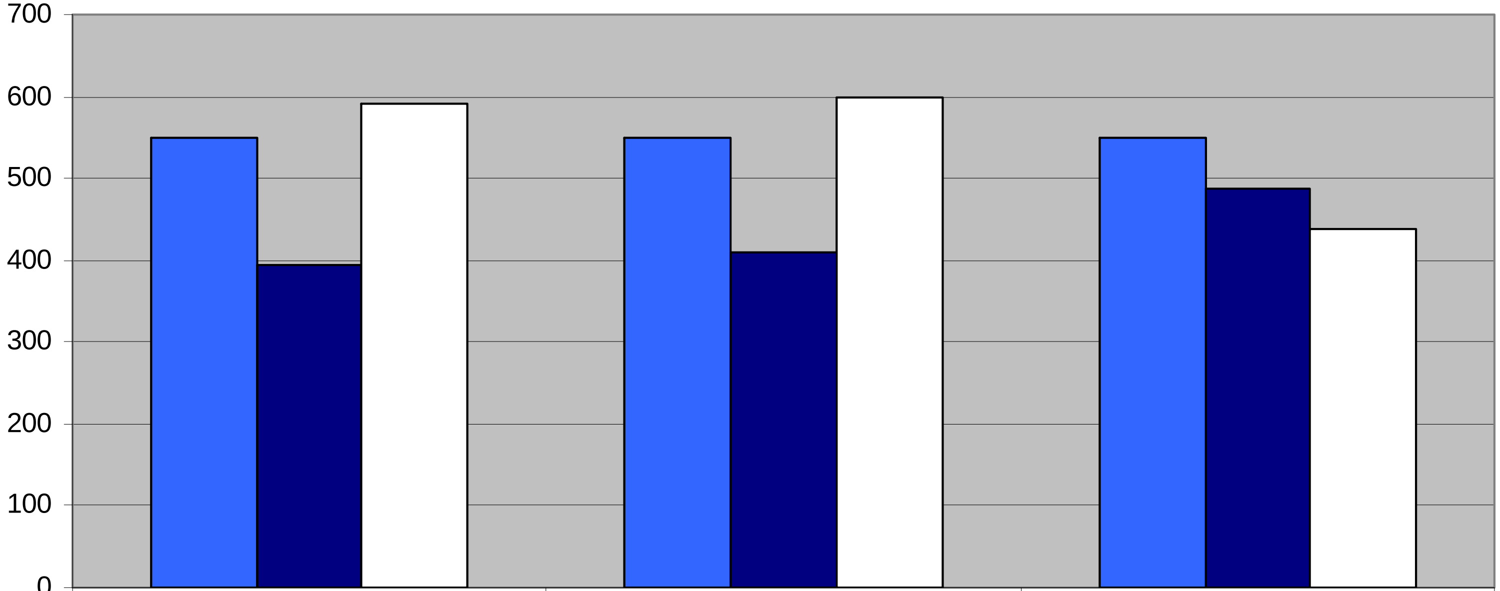
Leading European producers of common carp (output in tonnes)



	2008	2009	2010
Czech Republic	17507	17258	17746
Poland	17000	16000	16000
Hungary	10485	10500	9927
Germany	10500	9000	9000
France	6000	6000	4000
Croatia	2200	1500	3100

Carp market in EU

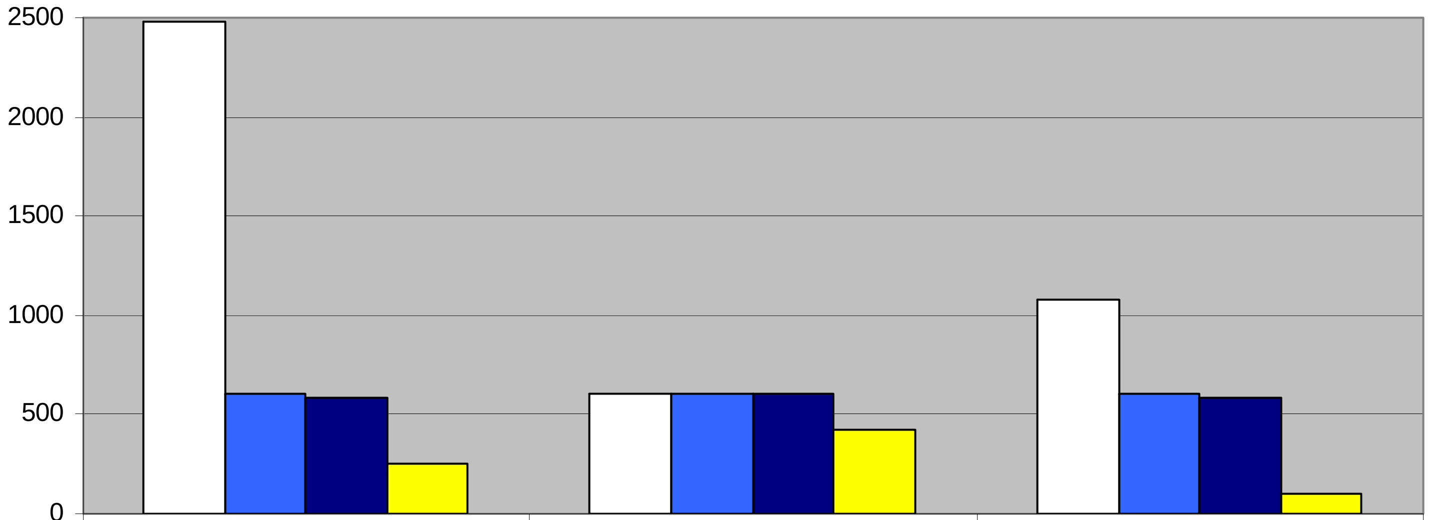
Leading European producers of Grass carp (output in tonnes)



	2008	2009	2010
Poland	550	550	550
Czech Republic	394	409	488
Hungary	591	600	437

Carp market in EU

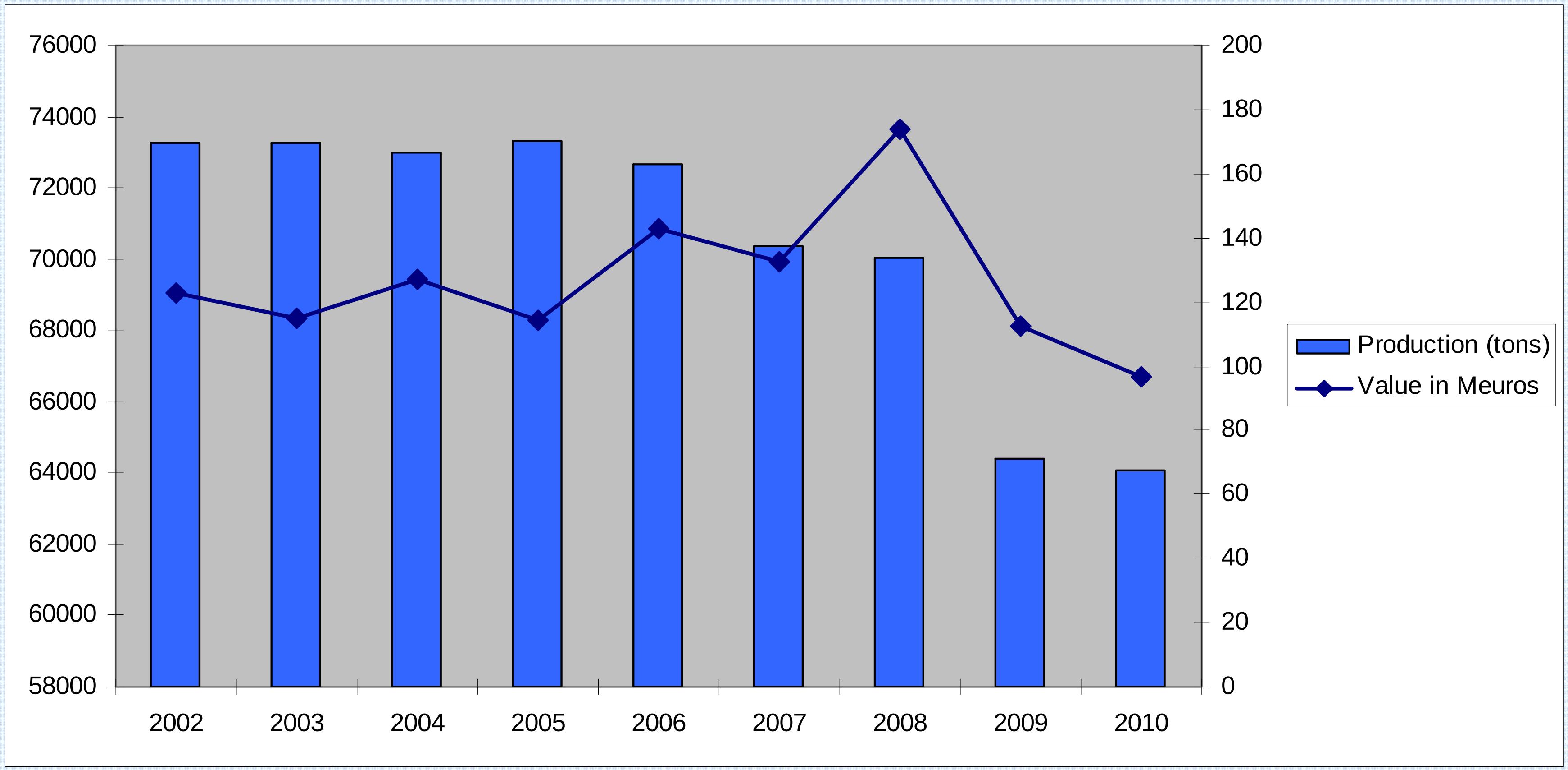
Leading European producers of Silver carp (output in tonnes)



	2008	2009	2010
Hungary	2483	600	1080
Poland	600	600	600
Czech Republic	586	601	583
Croatia	250	420	100

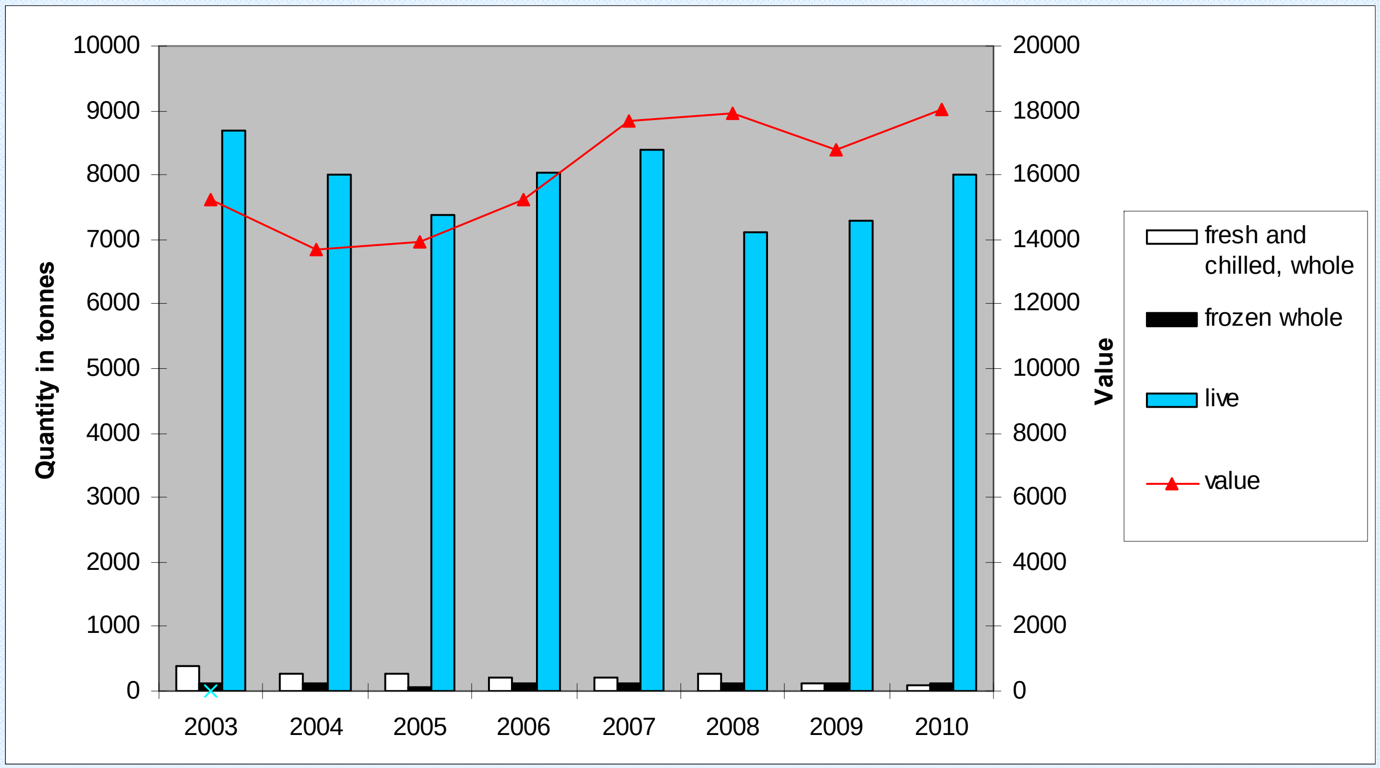
Carp market in the EU

Development of carp production (in tonnes) and value (in EUR million) in European countries



Carp trade: Czech case study

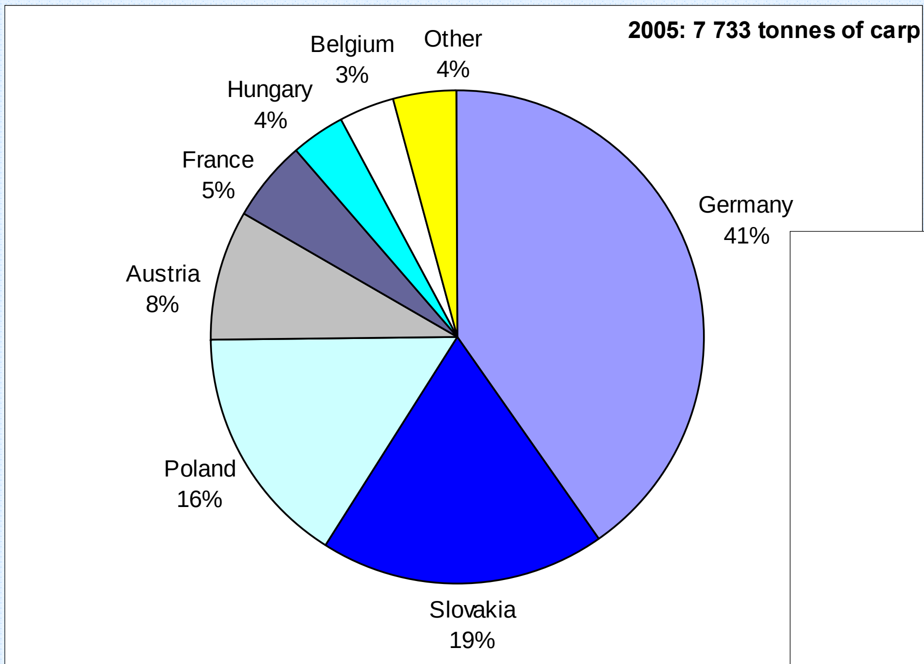
Developments of Czech exports of carp (in tonnes and in EUR thousands)

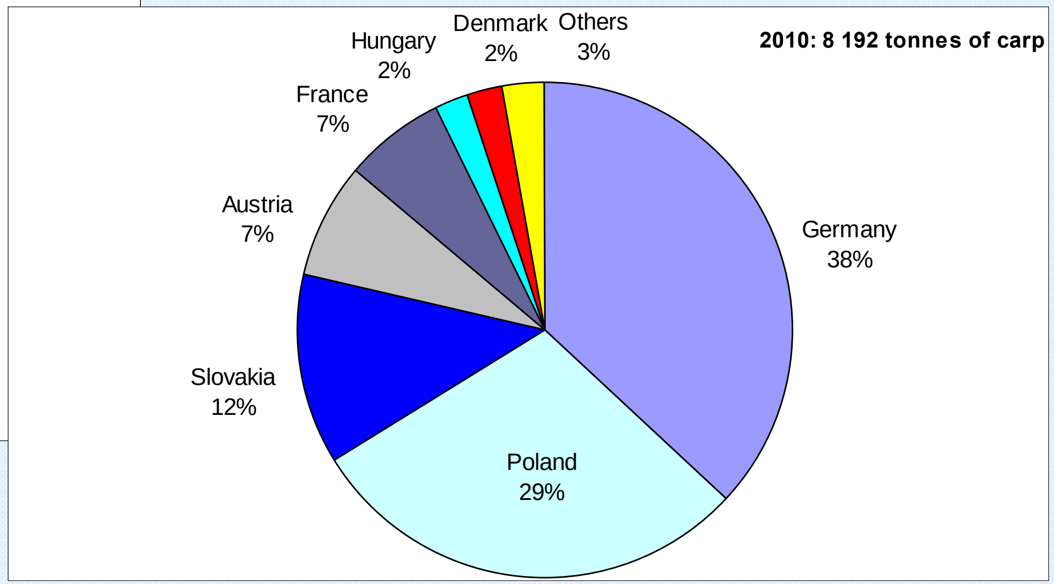


(2010) Live carp – 7 998 tonnes or 98% of the total carp export volume
Fresh and chilled whole carp – 87 tonnes or 1% of the total carp exports
Frozen whole carp – 107 tonnes or 1% of the total carp exports

Carp trade: Czech case study

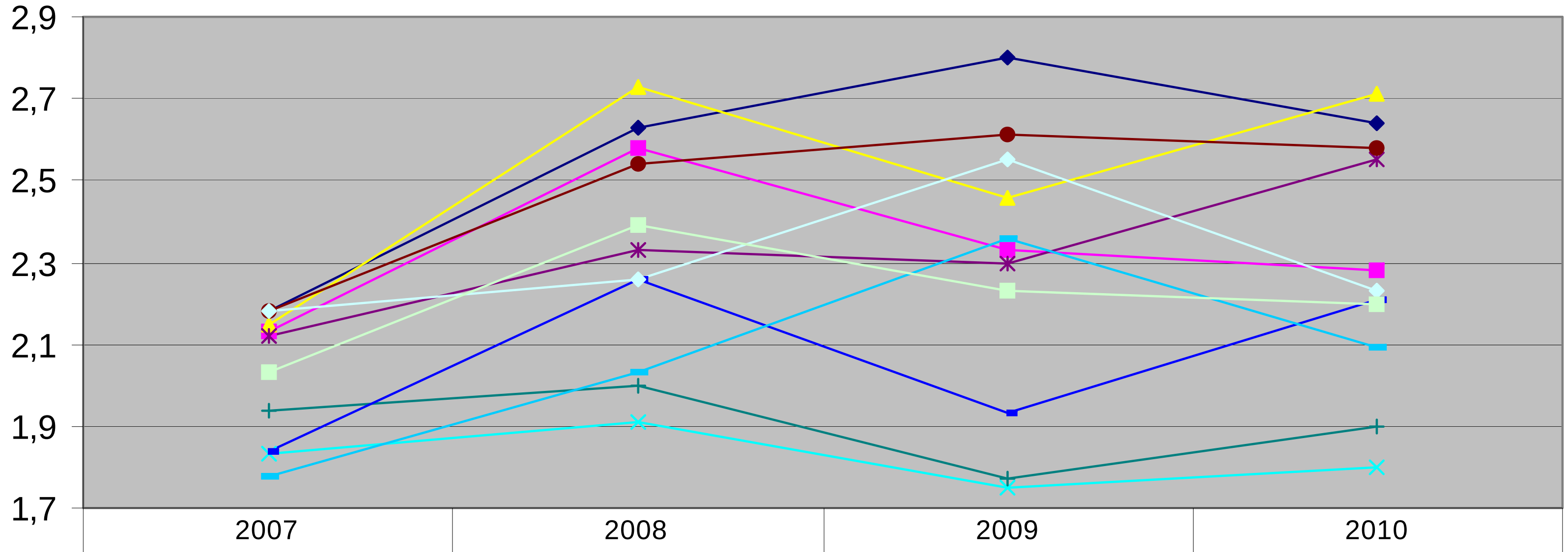
- Top-importers: Germany, Poland, Slovakia, Austria
- Emergent importing countries: Denmark
- Positive developments (2010/2009): Poland, Denmark
- Draw-back trends (2010/2009): Italy, Belgium, Hungary





Carp trade: Czech case study

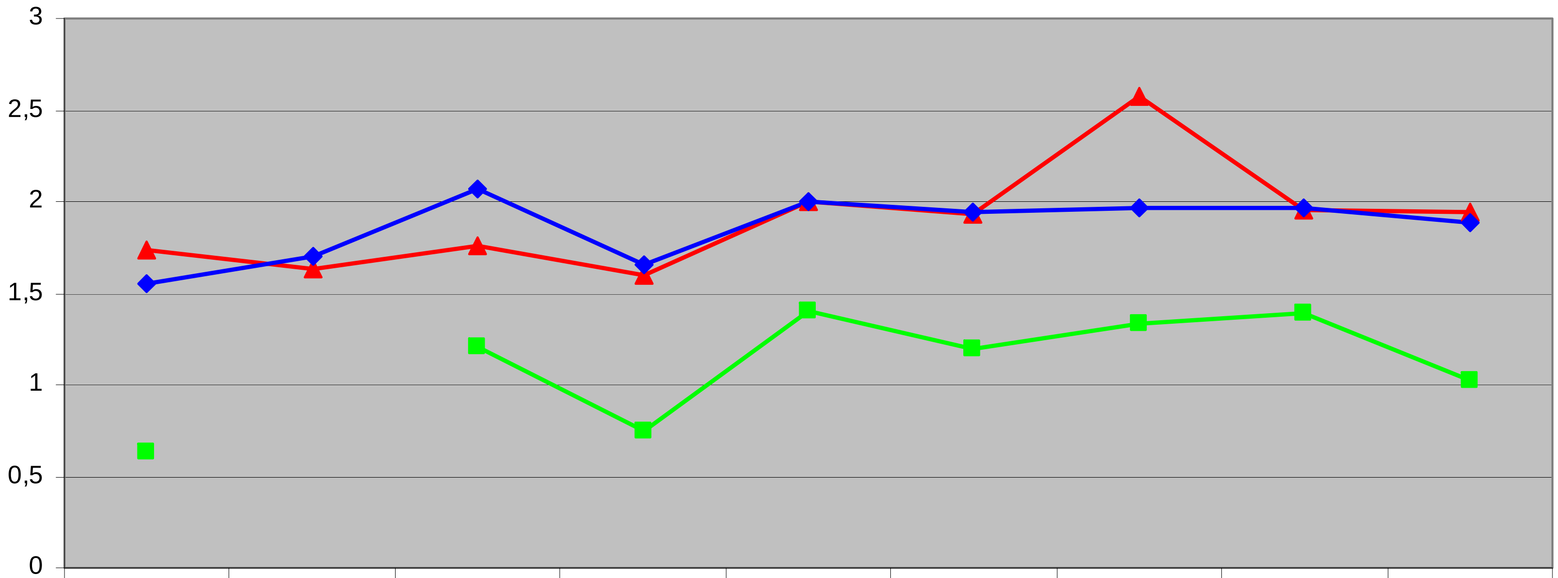
Development of export prices for carp (EUR per kg)



	2007	2008	2009	2010
France	2,18	2,63	2,8	2,64
Germany	2,13	2,58	2,33	2,28
Italy	2,15	2,73	2,46	2,71
Denmark	1,83	1,91	1,75	1,8
Belgium	2,12	2,33	2,3	2,55
Austria	2,18	2,54	2,61	2,58
Poland	1,94	2	1,77	1,9
Slovakia	1,84	2,26	1,93	2,21

Development of prices

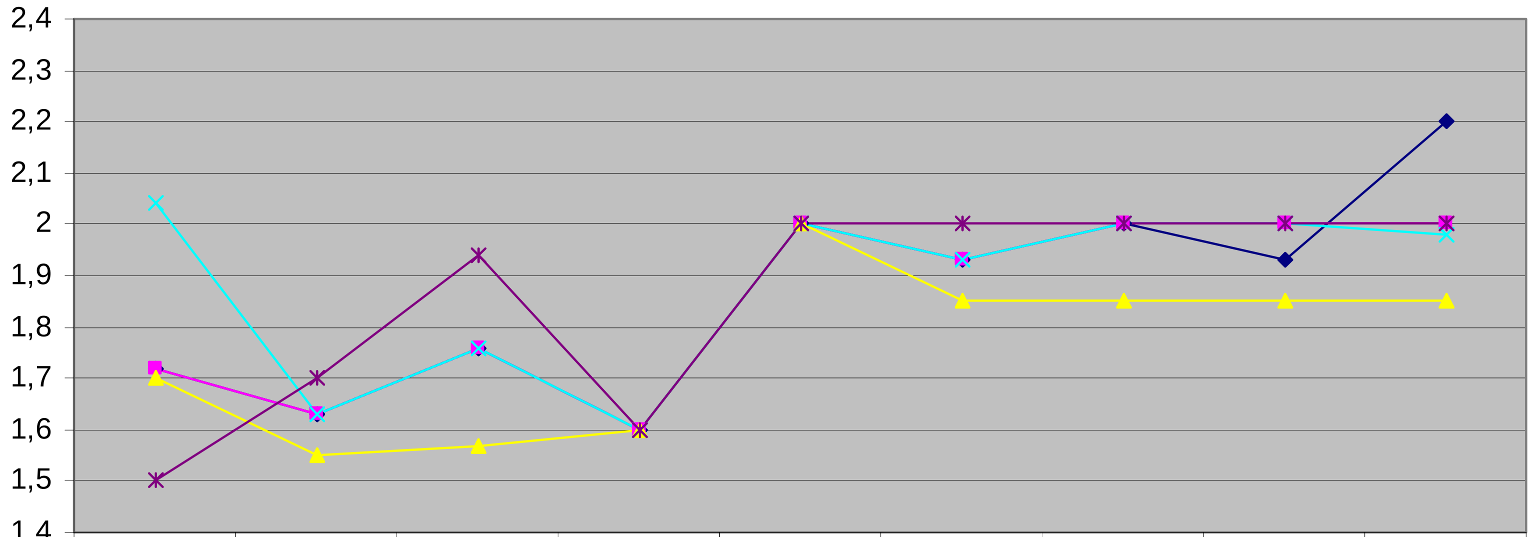
Average price in EUR per kg for carp species (ex-farm) in European coutnries



	2002	2003	2004	2005	2006	2007	2008	2009	2010
Common carp	1,73	1,63	1,76	1,6	2	1,93	2,57	1,95	1,94
Grass carp	1,55	1,7	2,07	1,65	2	1,94	1,96	1,96	1,88
Silver carp	0,63		1,21	0,75	1,4	1,2	1,33	1,39	1,02

Development of prices

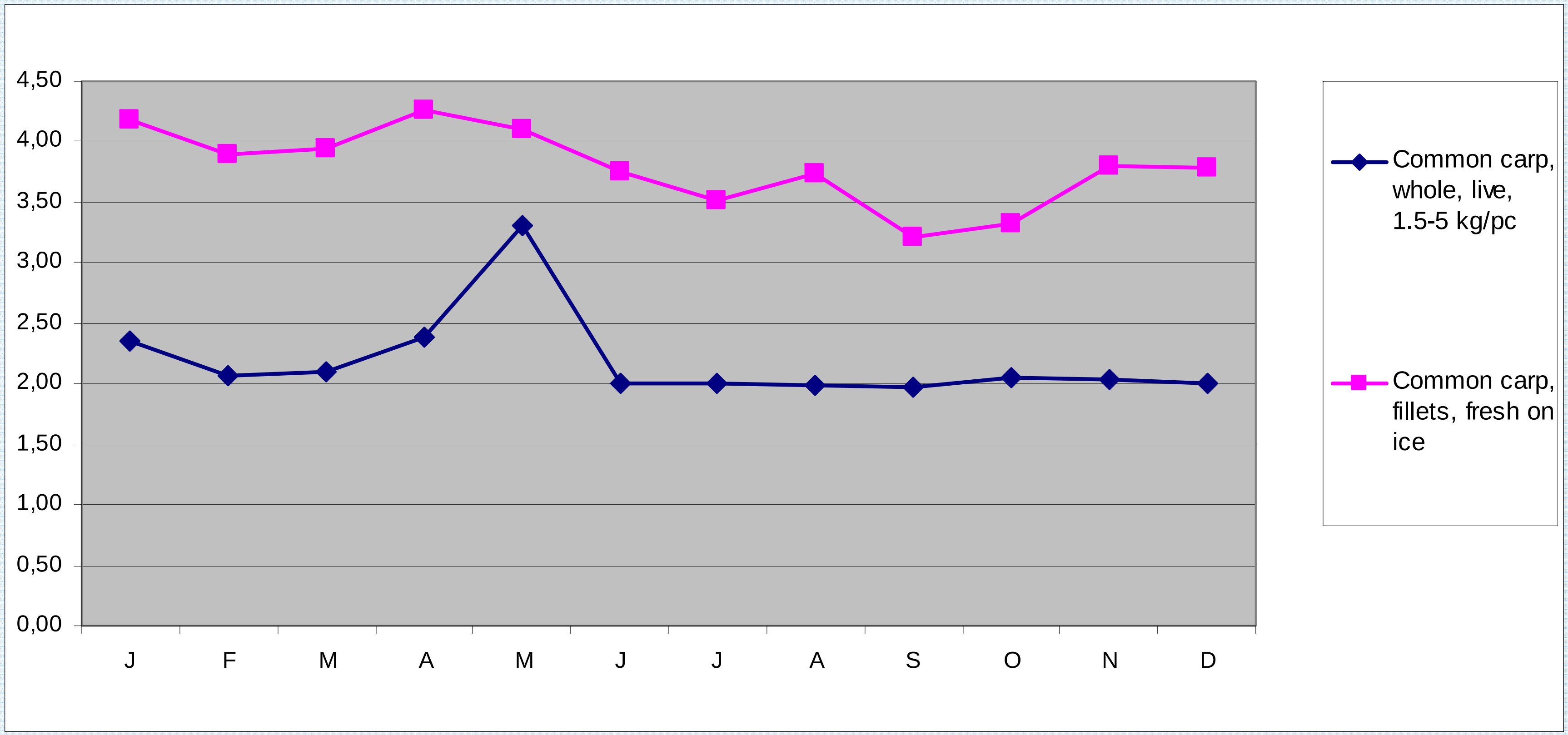
Average prices of Common carp (EUR/kg) in European countries



	2002	2003	2004	2005	2006	2007	2008	2009	2010
Austria	1,72	1,63	1,76	1,6	2	1,93	2	1,93	2,2
Croatia	1,72	1,63	1,76	1,6	2	1,93	2	2	2
Czech Republic	1,7	1,55	1,57	1,6	2	1,85	1,85	1,85	1,85
Hungary	2,04	1,63	1,76	1,6	2	1,93	2	2	1,98
Poland	1,5	1,7	1,94	1,6	2	2	2	2	2

Development of prices

Seasonal prices for common carp products in Hungary in 2010 (EUR/kg)



Demand and obstacles for carp

– Demand meets strong competition from other cheaper species;

– Consumption market is limited to:

- Central and Eastern Europe,
- Festive periods (X-mas, Easter),
- Home consumption

Product obstacles	
CEE countries	**Extra-CEE countries**
-	"Not high gastronomic experience"
-	Specific muddy taste
Too many bones	Too many bones
Difficulty in preparations	Difficulty in preparations
-	Old-fashion image
-	Difficult to find in retail and Ho-Re-Ca sectors
Lack of product innovation	Lack of product innovation

Current needs

- **Need for new products to revive market and expand sales season:**
  - fillets,
  - organic products,
  - breaded products,
  - «ready-to-eat products»,
  - «every day products»,
  - elimination of bones!

- **Need for promotional campaigns,**

- **Increase of consumption in HoReCa sector and better availability in the retail sector**

Commercial carp products

- Gutted and headed fish
- Semi-fillets (fillets with ribs)
- Fillets
- Minced carp meat (canned products, fish cakes and fish fingers)

Solutions to product obstacles:

- "Muddy taste" is improved by transferring fish to natural spring water for a few weeks before harvest;
- Inconvenience of bones in carp products is one of the reasons for demand drop – bone cutting machines.

Bones can be neutralized by several ways:

- Heat treatment which makes boned harmless for consumers,
- Removal of bones by pulling them out of the muscular tissue.

Difficulties with carp products:

- Headed and gutted carp – it is prevented by skin obscuring the bones,
- Semi-fillets and fillets – too little tensile strength of the bones compared to their attachment to the muscular tissue.

Case study of innovative equipment

- Sea Fisheries Institute in Gdynia, Poland and results of R&D work of SEAFOODplus.
- The easiest way to neutralize bones in commercial carp products is cutting them into very small and non-perceptible pieces (1 kg carp – 120 cuts at each side, by 3 mm).
- Three bone cutters were developed: for headed & gutted carp, semi-fillets and fillets. Portable bone cutter.

http://www.eurofishmagazine.com/magazine/all-issues/143-em-4-2010

Andrzej Dowgiallo, Sea Fisheries Institute in Gdynia

Variants of fish bone cutters for carp

Bone cutter machine for headed and gutted carp

- Carp is notched at both sides cutting bones in 3 mm parts while the spine bone remains untouched,
- Dimensions of machine -850/850/430 mm
- Size of processed fish to 500 mm long,
- Capacity to 25 fish/min,
- Operation – 1 person.

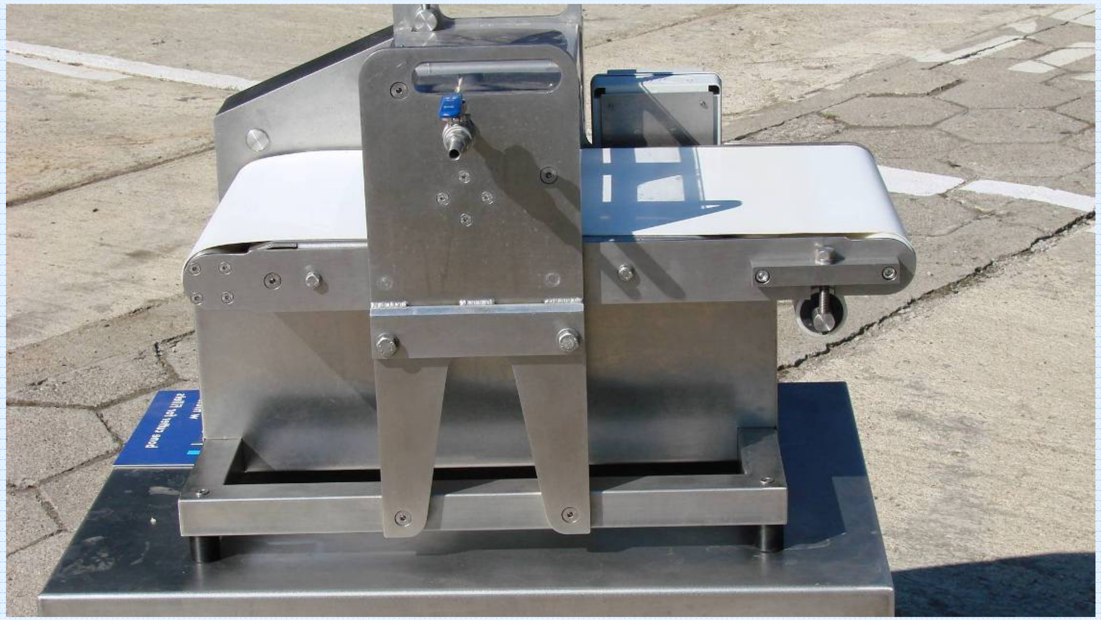
Variants of fish bone cutters for carp

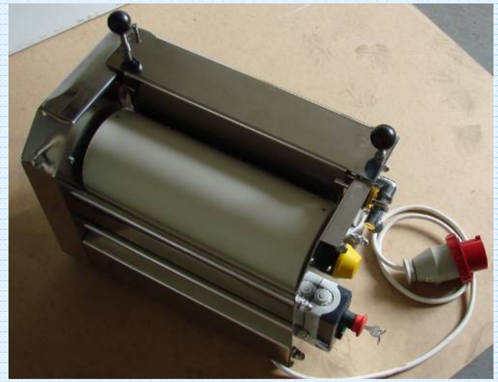
Bone cutter for semi-fillets

- **Semi-fillet moves under three sets of rotating knives**
- **Dimensions: 1300/900/1100 mm,**
- **Capacity – to 30 fillets/min,**
- **Size of the fillets – to 310 mm/length**
- **Operation – 1 person**

Case study of innovative equipment

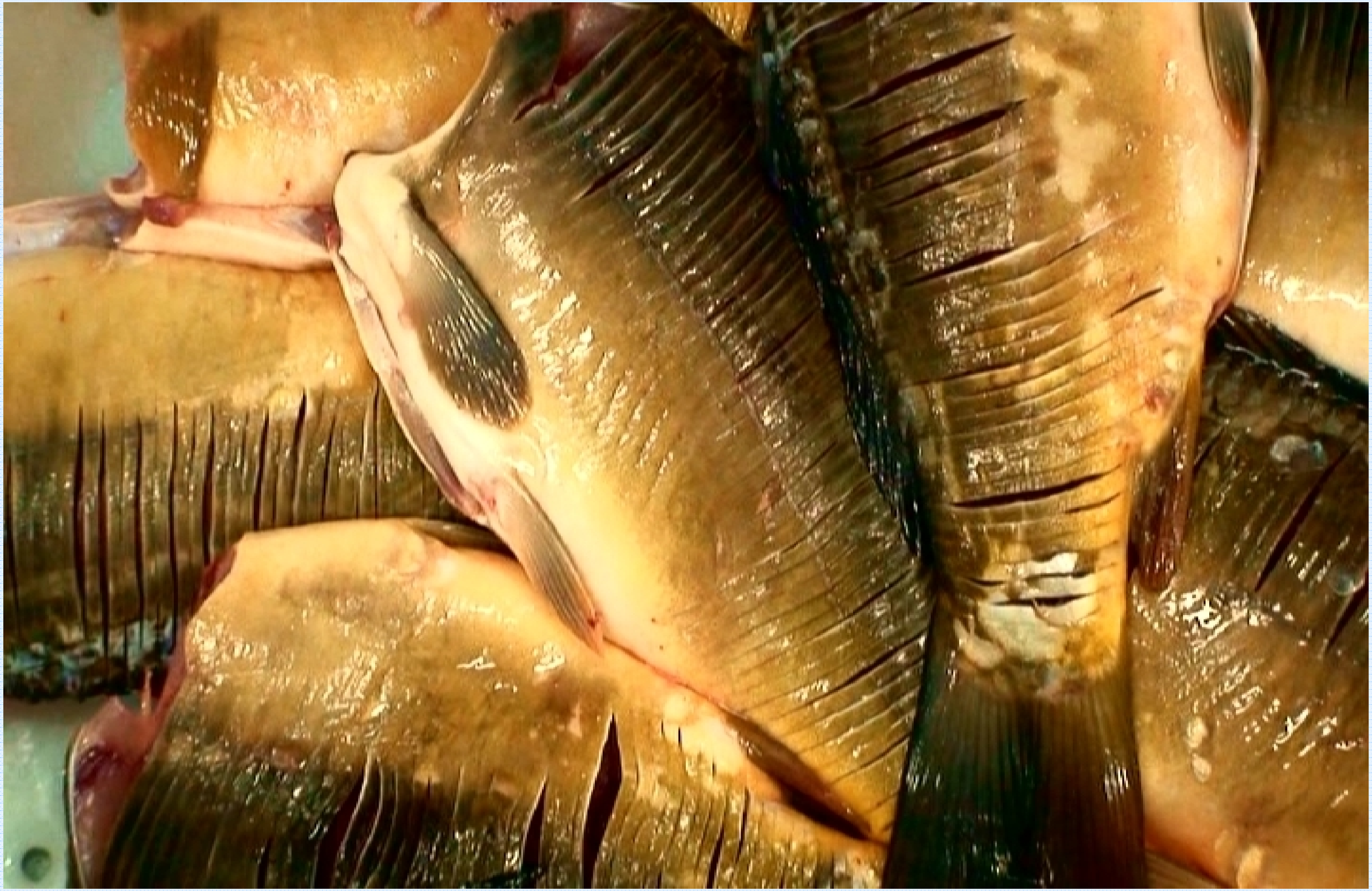
Bone cutter machine for carp fillets and portable bone cutter





Technical characteristics:
- Dimensions 600/600/500 mm,
- Capacity – to 30 fillets/min,
- Size of fillets - to 310 mm/length
- Operation – 1 person

Technical characteristics:
Dimensions 590/340/470 mm,
Capacity – to 50 fillets,
Size of fillets – to 400 mm,
Operation – 1 person



Promotional campaigns – Poland

"Carp International Conference" – Mr. Zbigniew Szczepański (Towarzystwo Promocji Ryb):

According to a survey conducted in 2010 on behalf of IFI in Olsztyn:

- Carp is the third top-selling fish in Poland
  79% of adult Poles bought carp at Christmas,

- But - as much as 40% of Polish women buy carp only because of tradition.

- Others do not buy carp because of:
  - too many bones,
  - inadequate taste,
  - problem of its preparation.

- What to do to convince those who still do not eat carp?

Promotional campaigns – Poland

5 promotional campaigns in the period 2005-2009 at the cost of EUR 1.8 million.

Major efforts were focused on:

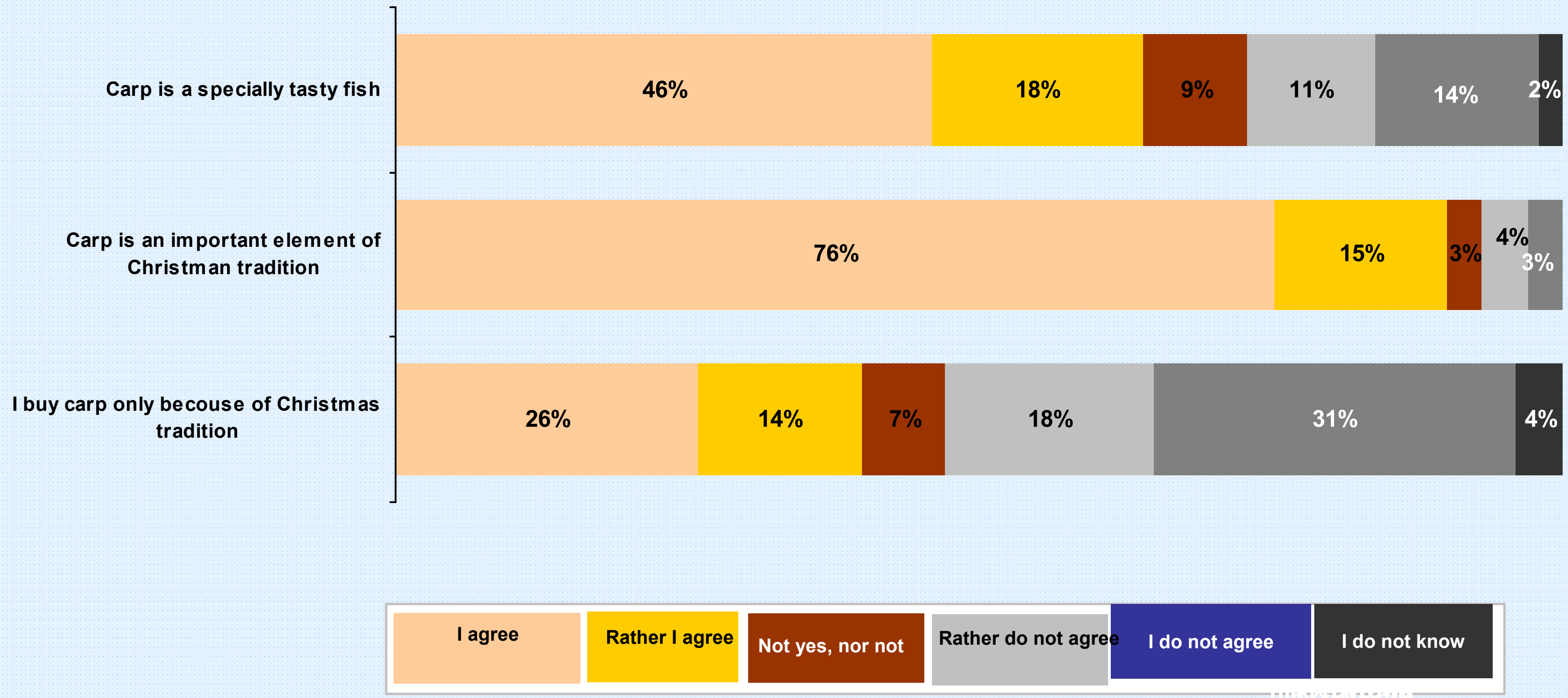
1) Development of a common "Mister Carp" logo for all producers,
2) Issuing certificates,
3) Development of www.pankarp.pl,
4) Production of labeled clothing to increase identification of producers and product

Promotional campaigns - Poland

- Promotional plan for 2011: 19 cities and regions of Poland,
- Promotion actions among children (several hundred kindergartens, schools, day centers, community centers, Polish schools abroad),
- Each year children make more than ten thousand works of art about carp,
- TV commercials, exhibitions, trade fairs and other field events.

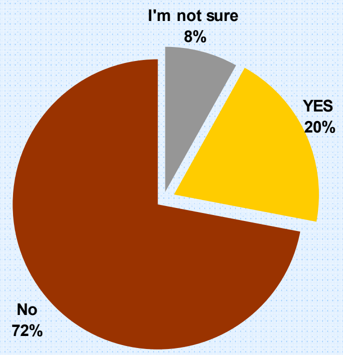
Promotional campaigns – Poland

Survey done by Fish Industry Magazine in Poland (Mr. Kulikowski): “Opinion on carp after the promotion”

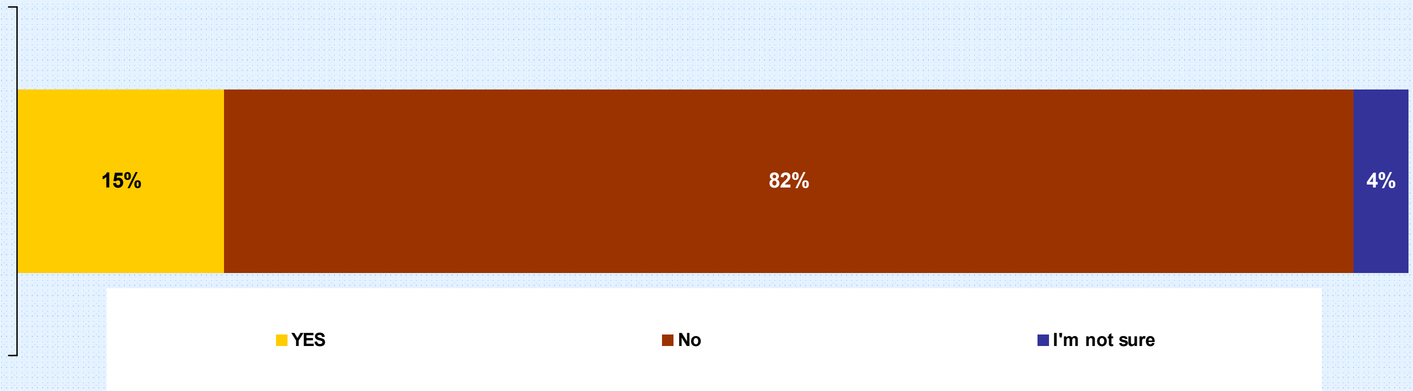


Promotional campaigns – Poland

Have you seen last time Pan Carp advertisement ?



Do you know Pan Carp brand?



Promotional campaigns - Hungary

www.aranyponty.hu

Promotional campaigns - Germany

www.erlebnis-fisch.de

Promotional campaigns – The Czech Republic

www.rybadomaci.cz

Promotional campaigns - Lithuania

- 6 months (138 thousand Euro)

- Calendars, leaflets and folders of recipes for carp, showing the benefits of health,
- Education materials and cooking the meat of carp,

- Folders on organic fish farming in Lithuania together with the addresses of fish farms,

- Press Releases

Carp case: the UK

- "Small-scale carp farming courses" at Upper Hayne Farm,
- Encouraging Britain's 2 million garden farm owners to farm carp
- Signs for changing image of carp in Britain,
- Carp was well-scored in blind-taste by Fearnley-Whittingstall,
- London's El Vino chain of wine bars is introducing carp on its menus.
- Focus on Eastern Europeans,
- Eco-conscious consumers

Conclusions

- Carp is sustainable answer to the world's growing demand for food;
- Carp market focuses on CEE consumers, both in CEE and Western countries;
- Need to revive consumption of carp through organized national campaigns focused both at adults and young generation;
- Active national promotion and education in schools/kindergartens and HoReCa sector;

Conclusions

- Boost of demand by new products and new technologies;
- Revival of positive and attractive image through media. Reconnection of best historical traditions and festive atmosphere of carp eating with new consciousness;
- Focus on eco-concept and sustainability.

Thank you for your attention!