



## **Overview of the world's anchovy sector and trade possibilities for Georgian anchovy products**

***Eurofish***  
INTERNATIONAL ORGANISATION

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## Abbreviations and acronyms

<b>CBI</b>	Center of promotion of imports from developing countries Agency of the Netherlands Ministry of Foreign Affairs
<b>EU</b>	European Union
<b>EUROSTAT</b>	European Statistics Portal
<b>FAO</b>	Food and Agriculture Organization of the United Nations
<b>HO-RE-CA</b>	Hotels, Restaurants and Catering sector
<b>IMARPE</b>	Peruvian Institute of the Sea
<b>MAP</b>	Modified Atmosphere Package
<b>MSC</b>	Marine Stewardship Council
<b>WHO</b>	World Health Organization

## Executive summary

Anchovies are some of the most world's traded fish species, especially with regards to the trade of the European Union and non-EU countries. In the past years, development of trade of prepared and preserved anchovies has been at a high rate, supplying a growing demand for ready-to-eat convenience fish products.

Georgia has an abundant resource of high quality anchovy in the Black Sea which has a big potential for development and assuring more economical value for the Georgian fisheries sector and the country. Taking into account the transformation of the sector which already started for upgrading fishing fleet and processing sector capacities, there is a good opportunity to develop the industry for modern types of value-added anchovy products destined for export to the EU market.

The most interesting markets in Europe for anchovies trade are the established Southern and Western European countries due to their size, large trading capacity and stable and even growing demand for anchovy products regardless the pressure in the past years as a result of the economic crisis. As a non-EU country, Georgia may have some advantages such as lower labor costs and tariff benefits. Premiums for Georgian exporters may apply to added-value anchovy products or to sustainably certified anchovy products.

## Methodology

The presented report is elaborated by EUROFISH International Organisation by the request of the Food and Agricultural Organization of the United Nations. The objective of this report is to provide information about the anchovies sector in the world, description of the major importing countries and potential market opportunities for Georgian anchovy industry oriented at exports.

The report contains introductory data about the world's anchovies sector, largest producing, importing and exporting countries, tendencies in anchovy trade and information on specific segments of the market in selected countries. The report is conceived as a combination of various information sources. All the statistical data in the report is based on Globefish reports, the FAO Fishstat Plus and EUROSTAT figures. Other important sources of information were the following websites: [www.cbi.eu](http://www.cbi.eu), [www.eeas.europa.eu](http://www.eeas.europa.eu), [www.pcfisu.org](http://www.pcfisu.org), <http://www.int-res.com/>, [www.codexalimentarius.net](http://www.codexalimentarius.net) and the websites of the retail chains in selected countries: [www.mysupermarket.co.uk](http://www.mysupermarket.co.uk), [www.carrefour.es](http://www.carrefour.es), [www.carrefour.it](http://www.carrefour.it), [www.gourmantis.de](http://www.gourmantis.de), [www.kaufland.de](http://www.kaufland.de), [www.lebensmittel.de](http://www.lebensmittel.de).

This report may serve the Georgian industry as a background idea for further development of the anchovies processing industry and an insight into the current trends on the European market as well as selected European countries.

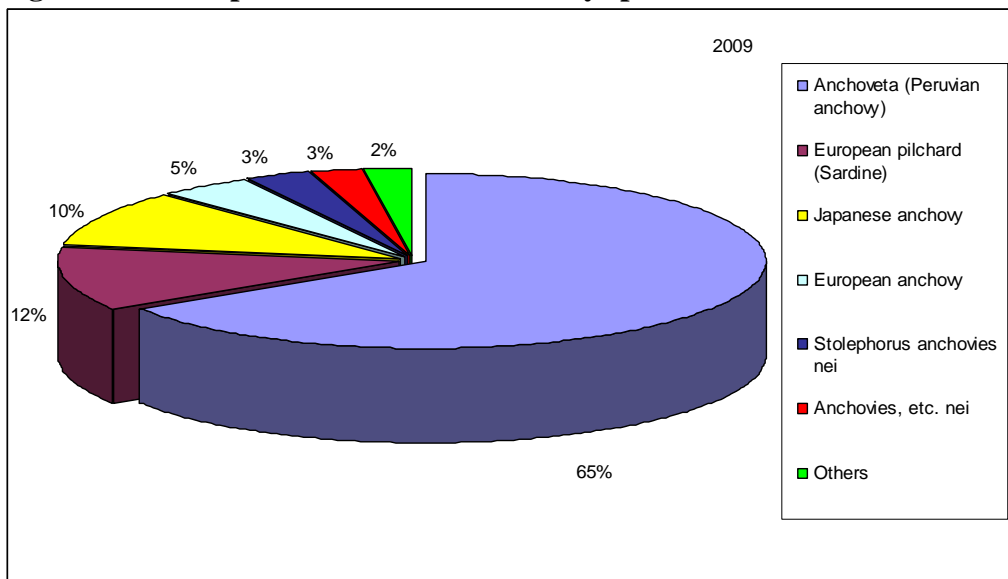
# 1 Introduction

Anchovies are small, tiny and silver saltwater forage fish belonging to *Engraulidae* (Mediterranean and European) and *Anchoa* (North America) family. There are about 145 species in 17 genera found in the Indian, Atlantic and Pacific Oceans and Mediterranean Sea. Of those, 5 anchovy species (Anchoveta or Peruvian anchovy (*Engraulis ringens*), European pilchard (*Sardina pilchardus*), Japanese anchovy (*Engraulis japonicus*), European anchovy (*Engraulis encrasicolus*) and Stolephorus anchovy which includes 20 different species) are distinctive in the world's catch and these species are harvested for human consumption.

## 1.1 World production of anchovies by species

The worldwide production of anchovies accounts to nearly 10.5 million tonnes (2009). The major part of the total anchovy production (65%) is represented by Anchoveta, which is also called Peruvian anchovy, with the total production of 6.9 million tonnes. The catches of Peruvian anchovy dropped severely in 1998 following the adverse El Niño environmental conditions, which effects every 3 to 4 years, where warm water inflows have a negative impact on biomass<sup>1</sup>. In 2000, more favorable climatic conditions led to one of the highest catches on record, of around 11 million tonnes, but in 2002, the fishery Peruvian anchovy declined to 9.7 million tonnes. In the past several years, Peruvian anchovy catch has been at the level of 7-7.5 million tonnes.

**Figure 1: World production of anchovies by species**



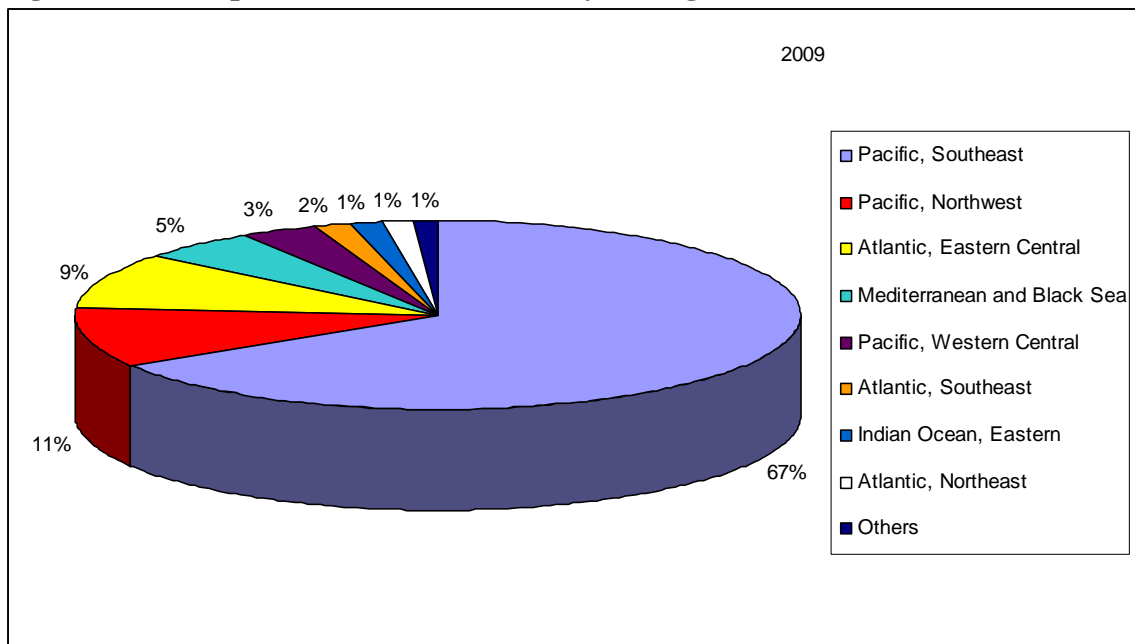
<sup>1</sup> El Niño is a natural disturbance of normal weather patterns and brings warm waters and heavy rain along the equator to the coast of Peru. During an El Niño, the water temperature can be as high as 28-29°C, compared with a normal 14-23 °C. As a result, a phytoplankton is greatly diminished with impacts on the rest of the fish food chain.

The second largest caught anchovy species is European pilchard (or Sardines) accounting for 12% of the world anchovy catch or 1.2 million tonnes. Japanese anchovy follows next with a share of 10% amounting to 1 million tonnes. European anchovy is another important species responsible for 5% of the total anchovy catch with a volume of 479 000 tonnes. 8% of the world anchovy catch consists of unidentified anchovies nei including *Stolephorus* and other anchovies. The volume of this category amounts to 815 000 tonnes.

## 1.2 World production of anchovies by fishing area

Since Peruvian anchovy is the dominant species in the anchovy family *Engraulidae*, the biggest share of the world's production of anchovy by fishing areas belong to the Southeast Pacific Ocean. Peruvian anchovy, which is caught on the coasts of Peru and Chile, accounts for 67% or 6.9 million tonnes.

**Figure 2: World production of anchovies by fishing area**



The Northwest Pacific part is responsible for 11% of the overall anchovy catch with a volume of 1 million tonnes. Such countries as China, Japan, The Republic of Korea and other countries contribute to this anchovy production. Eastern Central Atlantic part adds a 9% in the total anchovy catch with 994 000 tonnes with catch supplies from South Africa, Morocco, Mauritania and other countries.

Mediterranean and Black Sea area gives 5% of the world's anchovy catch which is equivalent to 563 000 tonnes. The largest supplying countries of this area are Turkey, Italy, Georgia and Greece. Other geographical areas of the global anchovy catch include Western Central Pacific (3% or 356 000 tonnes), Southeast Atlantic (2% or 174 000

tonnes), Eastern part of Indian Ocean (1% or 136 000 tonnes), Northeast Atlantic (1% or 134 000 tonnes) and other geographic areas (1% or 124 000 tonnes).

### 1.3 World catch of anchovies by countries

The anchovy stock in the waters off Peru (and Chile) is the world's largest fishery. In terms of producing countries, Peru is evidently the largest fishing nation of anchovies in the world. In 2009, Peruvian fleets caught 5.9 million tonnes of anchovies which corresponds to 57% of the total catch of anchovies in the world. Since 1990s, Peruvian sector has had a stable system of setting total catches based on stocks assessment, conducted by the Peruvian Institute of the Sea, IMARPE. Though, the system brought a major increase in the fleet, which required a reduction in the fishing season to 50 days per year. Catching a volume of 5 to 6 millions tonnes of anchovies meant some days 150 000 tonnes of fish were caught which put the biomass under pressure and led to risky working conditions<sup>2</sup>. In 2009 Peruvian government introduced an individual quota system, which was supported by most companies and workers of the sector. The fishing season has been extended to 190 days and the average catches per day decreased to 30 000 tonnes. This was a positive measure leading to smaller number of fishing boats at bays the same fishing time and safer conditions for crew members reflected in a fewer number of accidents. Even though the economic value of the catch is moderate compared to that of fisheries in other countries, the impact of the anchovy fishery on the economy of Peru has been enormous. Nearly all the anchovies are converted to fishmeal which is marketed in developed countries.

Although Peru is taking the great majority of *Anchoveta* in the Southeast Pacific, its southern neighbor Chile has developed fish meal industry based on the anchovies. Chile catches around 1 million tonnes of anchovies, being the second largest anchovies fishing country in the world and responsible for 9% of the global anchovies catch. A little less than half of the world's total supply of fish meal comes from these two countries.

China is the third largest country for anchovies catch. China's Japanese anchovy fishery started in 1990s and had dramatically expanded to 1 million tonnes already in 1998. At present, the total fishing volume of Japanese anchovies in China is 800 000 tonnes, and China is responsible for 8% of the total volume of anchovies catch in the world and 66% of Japanese anchovies catch globally. The catch by Japan of Japanese anchovies has been relatively stable since 1950 amounting to 300-350 000 tonnes per year.

The fourth largest fishing nation for anchovies is Turkey which harvested around 522 000 tonnes of European anchovy in 2009. Turkish anchovy fishery in the Black Sea has a high proportion in the total fish harvest. The sharp decline in anchovies catches in 1989 and onwards is connected to several following reasons and hypotheses: (1) anchovy stocks collapsed due to heavy predation by *Mnemiopsis leidyi*<sup>3</sup> on fish eggs and larvae;

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<sup>2</sup> "Peruvian anchovy fishery", by International Sustainability Unit, [www.pcfisu.org](http://www.pcfisu.org)

<sup>3</sup> The North Atlantic ctenophore *Mnemiopsis leidyi* was accidentally introduced into the Black Sea and Sea of Azov via the ballast tanks of ships, and has been blamed for causing sharp drops in fish catches by eating



(2) heavy competition by *Mnemiopsis leidyi* for zooplankton caused by anchovy stocks to starve; (3) severe overfishing of the anchovy stock made its food available to the ctenophore<sup>4</sup>, resulting in the latter's sudden population explosion; (4) a regime shift starting in the second half of 1980s and affecting phyto-and zooplankton production triggered the decline in the anchovy stock as well as the bloom of the comb jelly<sup>5</sup>.

**Table 1: World anchovies production by producing countries (in thousands tonnes)**

Country	2009
Peru	5935,2
Chile	955,2
China	806,7
Turkey	521,9
Japan	344,8
South Africa	234,8
Republic of Korea	207,5
Indonesia	203,7
Thailand	174,5
Mexico	144,1
Ecuador	103,8
India	81,8
Philippines	70
Panama	61
Italy	59,8
Argentina	58,5
Malaysia	54,4
Morocco	47,6
Lithuania	46,3
Mauritania	42,6
Georgia	34,1
Greece	33,9
Others	271,4
<b>Total</b>	<b>10493,4</b>

There are several shared stocks occurring within the economic zones of one of the two or more coastal states in the Black Sea for anchovy as well as other species like bluefish, bonito and horse mackerel. For example, the Turkish anchovy catch in the Georgian waters between 2003 and 2009 was estimated at 60 968 tonnes<sup>6</sup>. Some Turkish and

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Ctenophores, commonly known as Comb jelly, are a phylum of animals that live in marine waters worldwide.

<sup>5</sup> "Update of Black Sea occurrence", Marine Ecology Programme Series 269: 173-183, 2004 , <http://www.int-res.com/>

<sup>6</sup> Öztürk, Keskin and Engin, "Some remarks on the catches of anchovy in Georgian waters by Turkish fleet between 2003 and 2009", J. Black Sea/Mediterranean Environment, Vol. 17(2): 145-158 (2011).

Georgian companies established joint ventures for processing and producing fish oil and meal in Georgia.

Georgia has a large resource of high quality anchovies (European anchovy) in the Black Sea which has a big potential for development. Whereas the average annual catch of anchovies in the Georgian waters of the Black Sea amounted to 80 000 tonnes in 1988, after the disintegration of the Soviet Union, the catches dropped to 2 000 - 7 000 during the 1990s as a result of the difficult economic and social situation, lack of financial resources, the lack of flexibility in the Georgian bank system and other. The insufficient Georgian fleet did not have the capacity to utilize its yearly anchovy quota (60 000 tonnes), therefore the Turkish fishermen started to catch anchovy in the Georgian waters of the Black Sea since 1996 by purchasing permission from the Georgian authorities to catch fish, as well as receiving permission from the Turkish authorities for operating overseas. The Georgian anchovy catch started to increase in 2005 as a result of increasing fishing efforts. After 2007, a quota system started in Georgia for all fishing fleet and this annual quota was fixed as 60 000 tonnes for ten years<sup>7</sup>. Currently, the Georgian fleet catches around 34 000 tonnes, and most of the catch is transported to Turkey directly by Turkish vessels as unprocessed or frozen. Therefore, Georgia has a good potential for development of high standard industries for canning, smoking and fresh fish export as well development of high quality fish meal plants, fish feed production and pet food production.

## 2. Anchovy processing

Analyzing the global anchovies sector and its processing forms, it is evident that in terms of volume, the most part of the world's catch of anchovies for human consumption is processed in frozen form; however there is a growing tendency for prepared and preserved anchovy products.

The most part of the world's anchovy catch is processed for fish meal, fish oil and other non-human consumption forms. In 2008, some 369 000 tonnes of anchovies were processed for human consumption. Of these, 60% or 222 000 tonnes were processed in the frozen form, 20% or 74 000 tonnes were processed as "prepared and preserved" and the other 20% or 73 000 tonnes were processed as "salted" anchovies.

Considering developments in the world's processing of anchovies, it should be noted that the frozen anchovies sector had experienced a strong rise until 2003 with the following fluctuations in the next five years. In 2008, the global production of frozen anchovies category went down by 17.5% to 222 000 tonnes compared to the year before. On contrast, the sector of "prepared and preserved" anchovies has been showing a continuous rising trend, except a little slow back in 2004. In the period of 2000-2008, the production

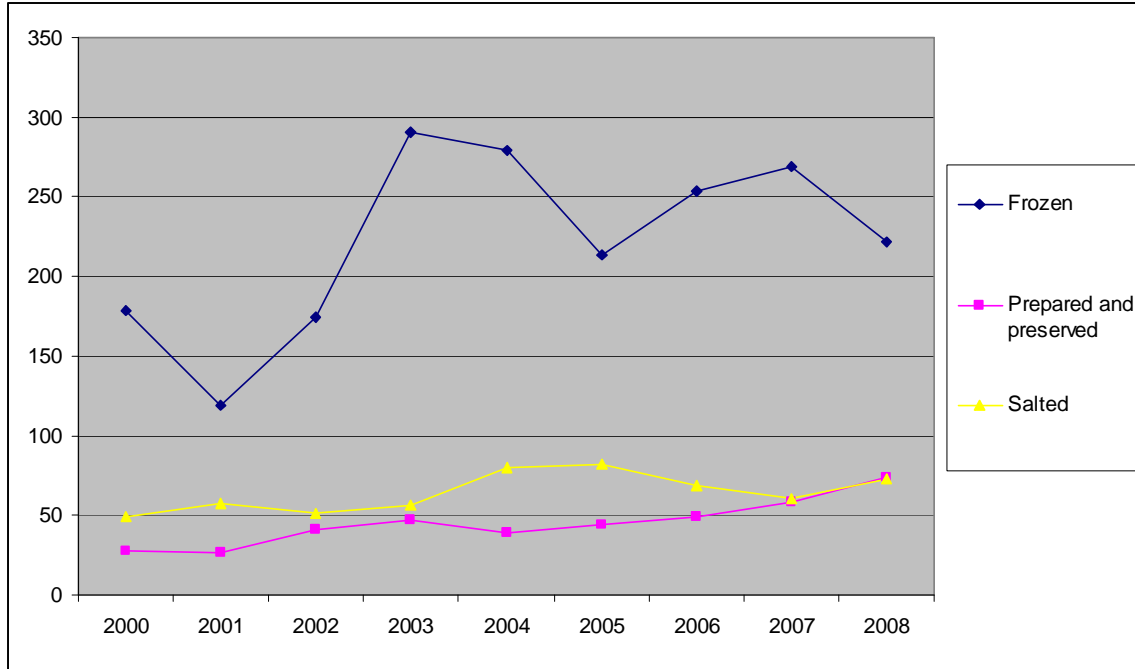
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<sup>7</sup> Öztürk, Keskin and Engin, "Some remarks on the catches of anchovy in Georgian waters by Turkish fleet between 2003 and 2009", *J. Black Sea/Mediterranean Environment*, Vol. 17(2): 145-158 (2011).

of “prepared and preserved” anchovies category increased by several times from 27 500 tonnes in 2000 to 74 200 tonnes in 2008.

In the same period, production of the salted anchovies category increased from 49 600 tonnes in 2000 to 72 500 tones in 2008. The categories of “prepared and preserved” anchovies and “salted” anchovies reached nearly equal volumes in the world’s production several times, namely in 2002, 2003, 2007 and 2008 years, confirming growing commercial importance of those product categories.

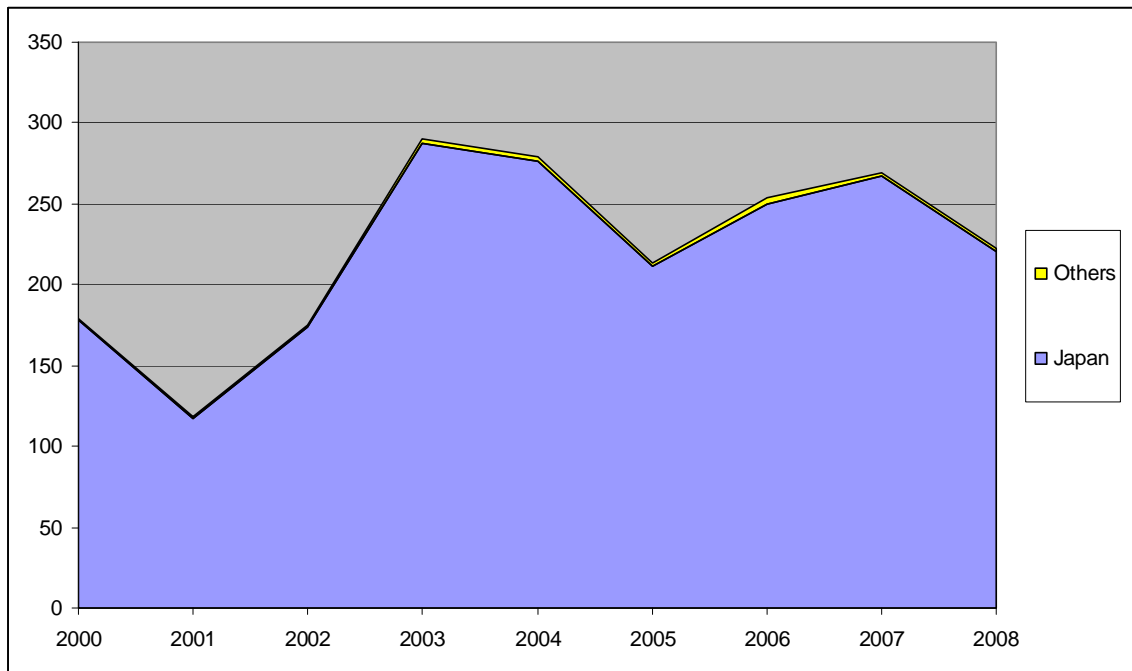
**Figure 3: World production of anchovies by processing forms (in thousands tonnes)**



## 2.1 World production of frozen anchovies

In 2008, frozen anchovies make up the main bulk in the anchovies processing sector amounting to 222 000 tonnes. In terms of countries-producers, Japan is responsible for nearly the entire production of frozen anchovies in the world accounting for 220 200 tonnes. During the 1990s and 2000s, the production of frozen anchovies by Japan ranged between 88 000 (in 1990) and 287 000 (in 2003) tonnes depending on overall anchovies catches in the coastal waters along the entire coast of Japan and southern Korean peninsula. Japanese anchovies are caught with purse seiners, which have relatively low bycatch.

**Figure 4: World production of frozen anchovies by countries**



Other countries produce 2 000 tonnes of frozen anchovies altogether. These include Argentina (900 tonnes), Greece (700 tonnes), Italy (300 tonnes) and Uruguay (100 tonnes).

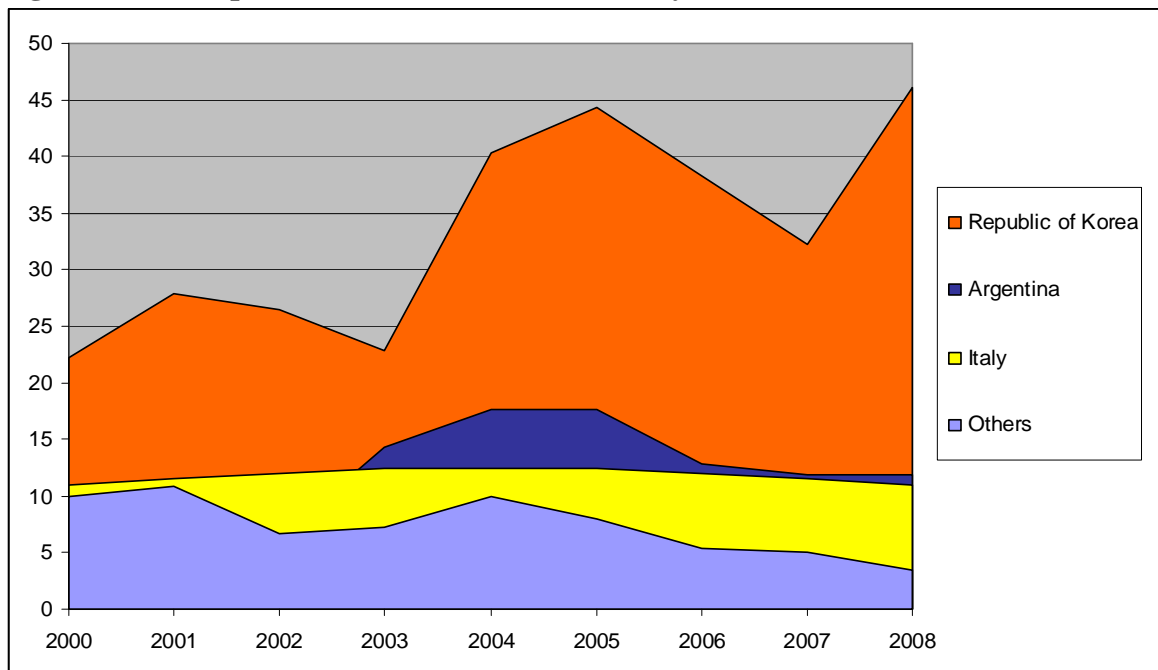
## 2.2 World production of salted anchovies by major producing countries

Regardless of the type of anchovies, preserving anchovies in salt uses a time-honored technique to deliver their distinctive flavor. Time is usually critical for the preservation of the flavor, so the processing must begin shortly after the fish are caught. Anchovies are cleaned and washed in salt brine, and then allowed to dry. The fish are then layered into large round tins according to fish size with each layer receiving a specific amount of sea salt. Afterwards, these tins are piled high into seasoning towers to allow the anchovies to cure for up to two months. These towers are topped with weights, compressing the fish

and removing excess fluids and fat. Once the specified curing time is over the tins are sealed and prepared for shipping.

The world production of salted anchovies was 72 100 tonnes in 2008, without counting “prepared and preserved anchovies” category. The Republic of Korea has been the world’s leading producer of salted anchovies amounting to 46 100 tonnes in 2008. Argentina and Italy are the next largest producers of salted anchovies after the Republic of Korea with 11 900 tonnes and 12 000 tonnes in 2008 respectively. A special feature of Korean anchovy *Aekjeot* production is fermentation. Anchovies, used for human consumption purpose in other countries are not fermented, but in Korea, anchovy are fermented and aged in a tank buried five meters deep. Large-size dried anchovies are used for making soups, and smaller-size anchovies are used for side dishes.

**Figure 5: World production of salted anchovies by countries**



**Picture 1: Example of dried and salted anchovies from Korea**

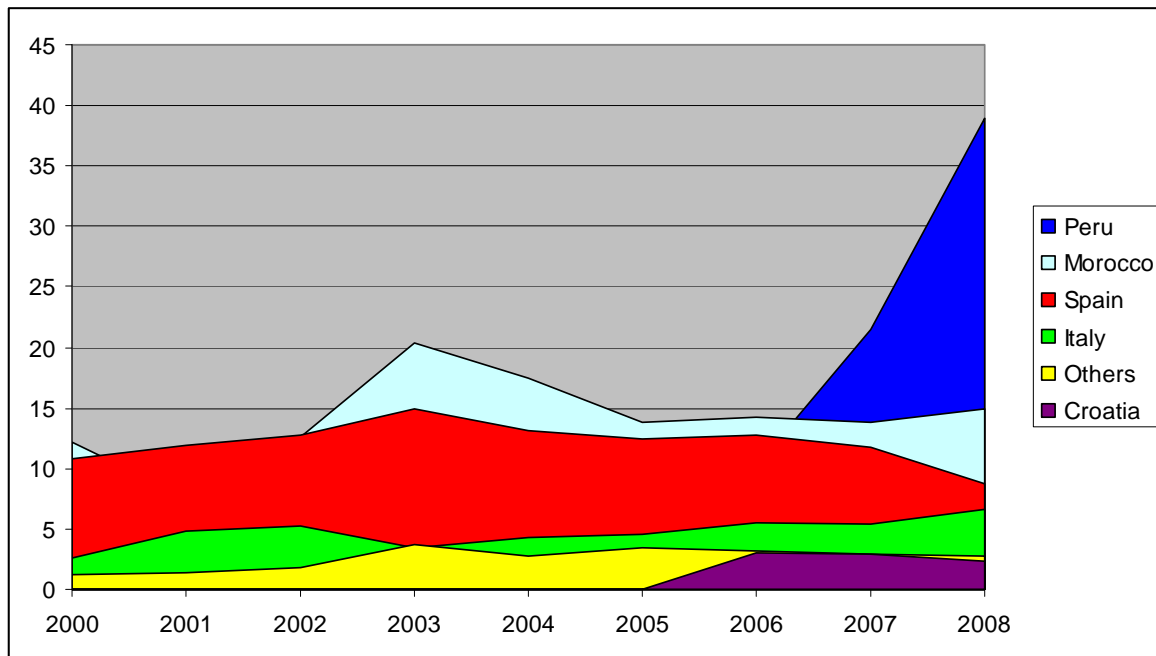


## 2.3 World production of prepared and preserved anchovies by major producing countries

Production of prepared and preserved anchovies has been developing very rapidly during the past years. Even though the main part of Peruvian anchovy catch goes to fish meal production and other non-consumer use, a small part of Peruvian anchovy harvest is processed as “prepared and preserved” products.

The global production of “prepared and preserved” anchovies products was 74 000 tonnes in 2008, up from 27 500 tonnes in 2000. Morocco had been the leading producer of “prepared and preserved of anchovies” until 2006 with a peak of its production at 20 300 tonnes in 2003 with a following decline to 14 200 tonnes in 2006. The year after, while Moroccan production remained at a stable level, Peru had taken the lead with production of 21 400 tonnes of prepared and preserved anchovies. In 2008, Peruvian production nearly doubled again compared to the year before amounting to 38 900 tonnes due to the rapid increase of canned anchovies production. Peruvian frozen anchovy is currently processed to become future canned anchovy in order to ensure availability of fish during bans<sup>8</sup>.

**Figure 6: World production of prepared and preserved anchovies by countries (in thousands tonnes)**



Morocco has a firm position as the second largest producer of prepared and preserved anchovies in the world with an output of 14 900 tonnes in 2008, which was 7% higher compared to the year before. The most common way of processing anchovies is by packing the salted fillets in oil, mainly olive oil. The traditional three-piece can has been

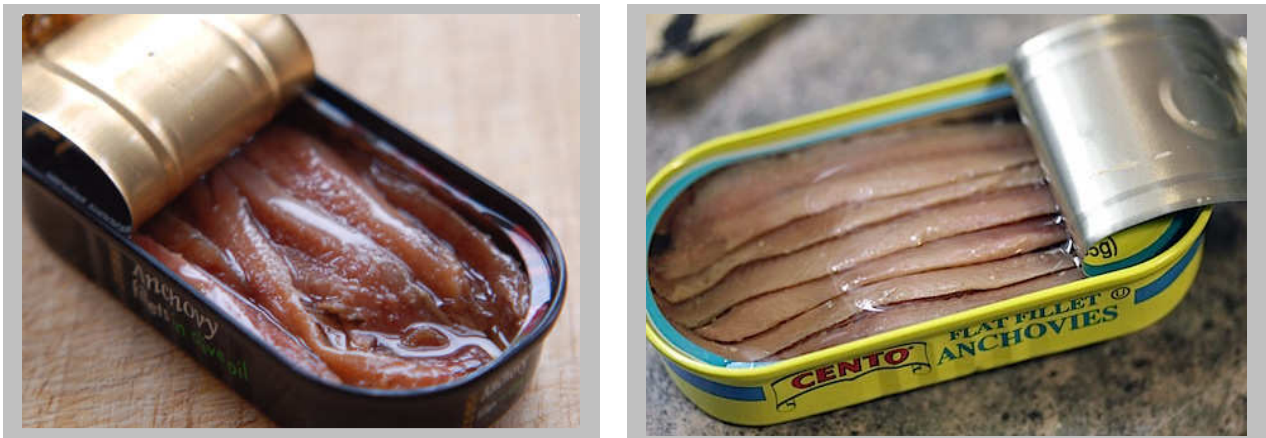
<sup>8</sup> “Status of fisheries and aquaculture in Peru: case studies of Peruvian anchovy fishery, shrimp aquaculture, trout aquaculture and scallop aquaculture” by Yvonne Evans and Sigbjorn Tveteras, FAO, 2011

replaced by new easy open cans of 48 g to 800 g. The other popular packaging medium for salted anchovies is glass containers<sup>9</sup>.

Spain is the next largest producer of prepared and preserved anchovies with 8 700 tonnes of production in 2008, followed by Italy (6 600 tonnes), Croatia (2 300 tonnes) and other countries (2 800 tonnes).

Regarding the methods of producing preserved anchovies, just like their salted cured counterparts, these fish must be fresh caught in order to ensure flavor. The fish are immersed in salt brine to clean them and then packed into very large drums with salt and strong brine. After curing for two months the fish are then cleaned of their fins and any left over hard pieces before undergoing repeated rinsing in salt water to remove scales and skin. Each anchovy is then filleted by hand, removing the bones and leaving two fillets per tiny fish. These fillets are now ready to be jarred or put into tins with olive oil.

**Picture 2: Examples of canned anchovies produced under the category of “prepared and preserved” anchovies**



**Picture 3: Illustration of marinated anchovies and salted anchovies produced under the category of “prepared and preserved” anchovies**



<sup>9</sup> “Revenue distribution through the value seafood chain”, by Fisheries and Aquaculture Department, FAO, 2006

Canned anchovies are the most common form of anchovy processed products for human consumption. While the process of salting fish to preserve them has been practiced for thousands of years, preserving fish in olive oil is a more recent invention. Physically, anchovies may be treated in numerous ways. They can be chopped and stirred into a marinade, or whisked into vinaigrette. The fillets can be pounded into a paste in a mortar and pestle, and dissolved into a sauce or a mayonnaise. Anchovies are often sautéed whole with other aromatics, and when a liquid is melted, they melt away, their fragile meat loosened apart.

**Picture 4: Example of anchovies packed in Modified Atmosphere Packaging produced under the category of “prepared and preserved” anchovies**



The role of anchovies in anchovies puree, olive oil and vinegar, and tapenade, the mixture of olives, anchovies, capers and lemon juice are just a few examples of some ways anchovies are used in the modern product processing forms. Anchovy paste is made of anchovy fillets ground to a paste. The paste is combined with salt and sometimes sugar to reduce the fishy flavor. Paste comes in tubes and is a much more pungent, salty and fishy product than other anchovies. All these products examples are marketed not only on the European market (especially in the Mediterranean countries), but also in the USA and Asia.

**Picture 5: Illustrations of other forms of anchovies produced under the category of “prepared and preserved” anchovies**





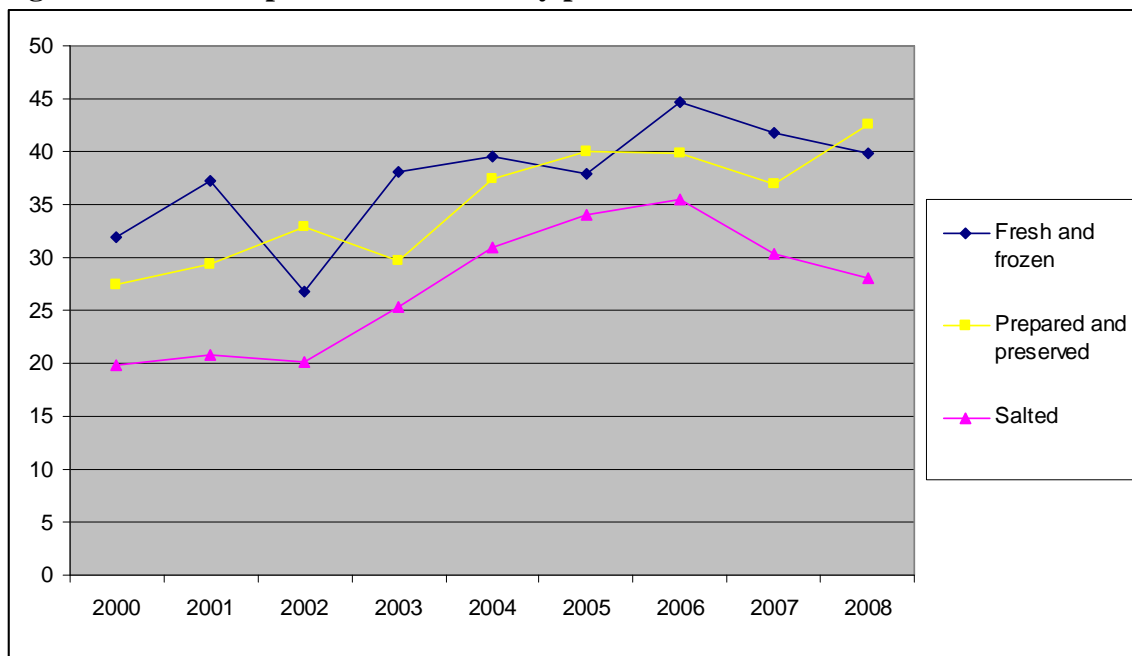
### 3. Anchovy trade

Anchovies are some of the most traded fish species in the European market, especially in the category of prepared and preserved fish. Along with tuna and sardines, anchovies are also some of the most important fish products which are imported to the European market from non-EU countries.

#### 3.1 Anchovy imports

In 2008, the world's imports of anchovies were registered at the level of 110 500 tonnes for a total value of USD 400 million. The category of prepared and preserved anchovies accounted for 39% in volume terms (42 600 tonnes) and 75% in value (USD 300 million). It is the only category of imported anchovies which increased during the crisis year 2008, both in term of volume (by 15 %) and value (by 8%) compared to the year before.

**Figure 7: World imports of anchovies by product forms**

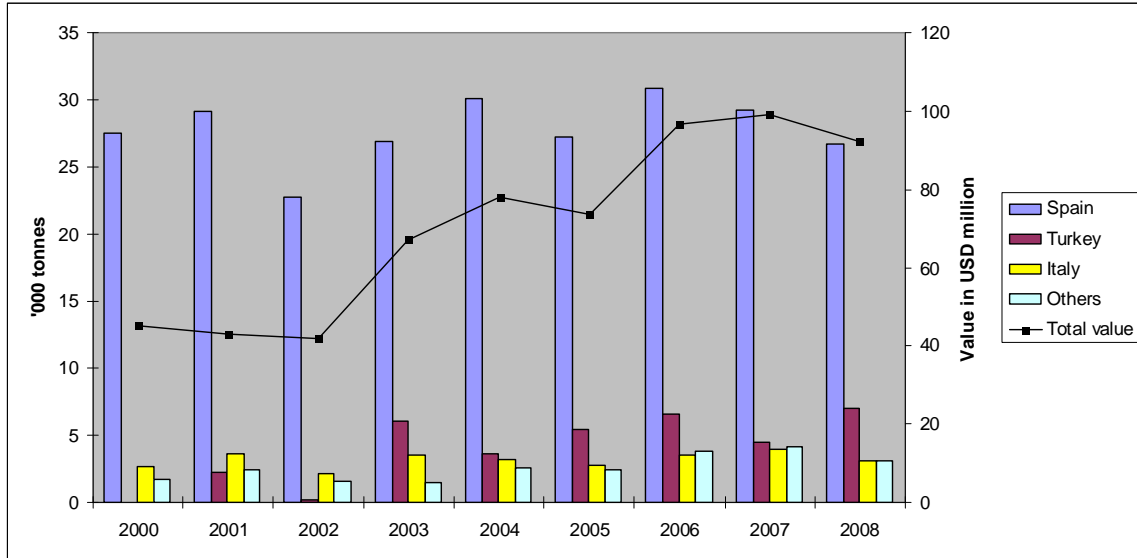


On contrast with the category of prepared and preserved anchovies, the groups of fresh and frozen and salted anchovies showed a downward tendency in the respective period confirming the growing demand for ready-to-eat prepared and preserved products.

The category of fresh and frozen anchovies is the second largest import categories in the world imports of anchovy's products after prepared and preserved anchovies. Spain is by far the largest importer of fresh and frozen anchovies with 26 700 tonnes in 2008 due to its large anchovies processing sector. Spanish imports of fresh and frozen anchovies have been showing a downward trend for the last few years which is partly substituted by growing imports of prepared and preserved anchovies. Turkey and Italy are other

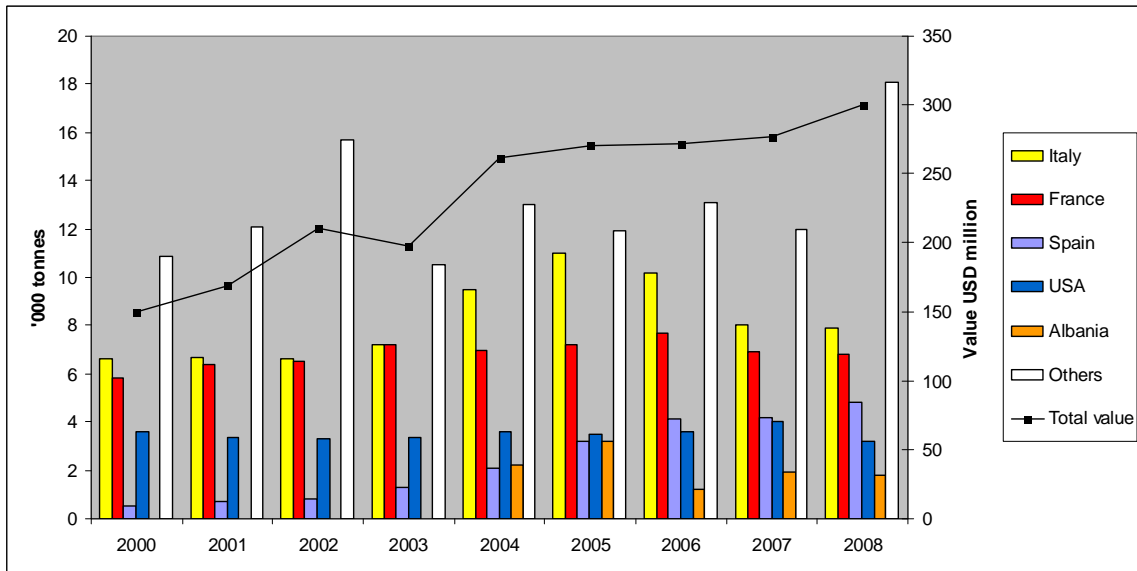
importing countries of fresh and frozen anchovies with 7 000 tonnes and 3 100 tonnes in 2008 respectively.

**Figure 8: World's imports of fresh and frozen anchovies by countries**



On opposite with other product forms, world's imports of prepared and preserved anchovies have been experiencing a general growth, although it was a minor reduction for some countries. Italy is the world's largest importer of prepared and preserved anchovies (7 900 tonnes), followed by France (6 800 tonnes), Spain (4 800 tonnes), the USA (3 200 tonnes), Taiwan (3 100 tonnes) and Albania (1 800 tonnes).

**Figure 9: World's imports of prepared and preserved anchovies by countries**

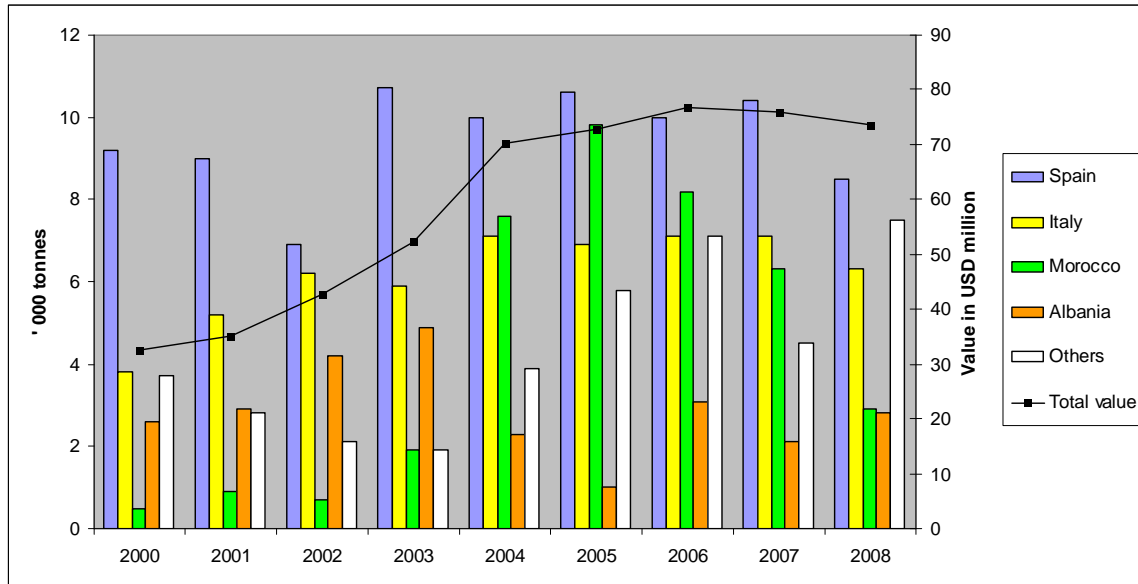


The value of the world's imports of prepared and preserved anchovies increased from USD 150 million in 2000 to USD 300 million in 2008. Italy is responsible for USD

63 million, followed by France (USD 59.7 million), Spain (USD 37.3 million), the USA (USD 25.9 million), the UK (USD 14.4 million) and other countries. It should be mentioned that even though both Italy and France slightly reduced their import volumes of prepared and preserved anchovies in 2008 compared to the previous year (-1% for both countries), the import value was up by 10% for both Italy and Spain.

The world's imports of salted anchovies amounted to 28 000 tonnes in 2008, down by 2 400 tonnes compared to the previous year. The value reached USD 73.5 million, which is 3% down from the year before. Spain was the major importing country of salted anchovies (8 500 tonnes), followed by Italy (6 300 tonnes), Morocco (2 900 tonnes) and Albania (2 800 tonnes).

**Figure 10: World's imports of salted anchovies by countries**

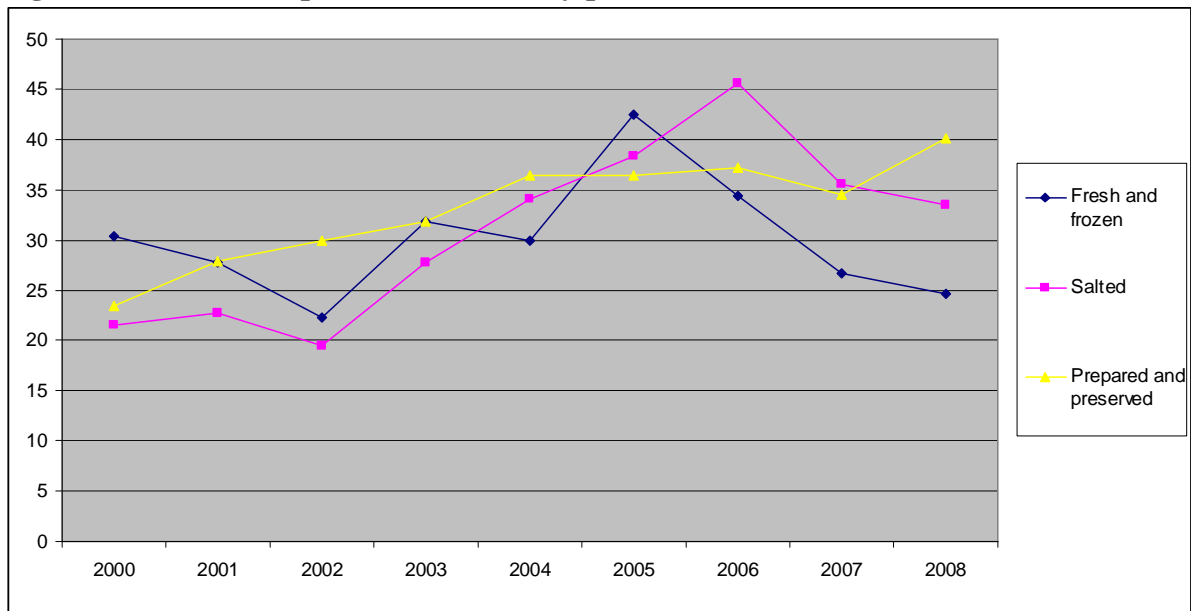


### 3.2 Anchovy exports

Corresponding with the trade tendencies of anchovies imports, the world's export of anchovies was recorded at the level of 99 000 tonnes in 2008 for a value of USD 442.5 million. The category of prepared and preserved anchovies was responsible for 41% of the world's total exports of anchovies products amounting to 40 000 tonnes. Nevertheless, this category made up 67% of value of the total global exports of anchovies.

Regardless the downward trend for export of the categories of fresh and frozen and salted anchovies, the export of prepared and preserved anchovies increased by 16% in 2008 compared to the year before. The value of this category also grew by 16% in the respective period.

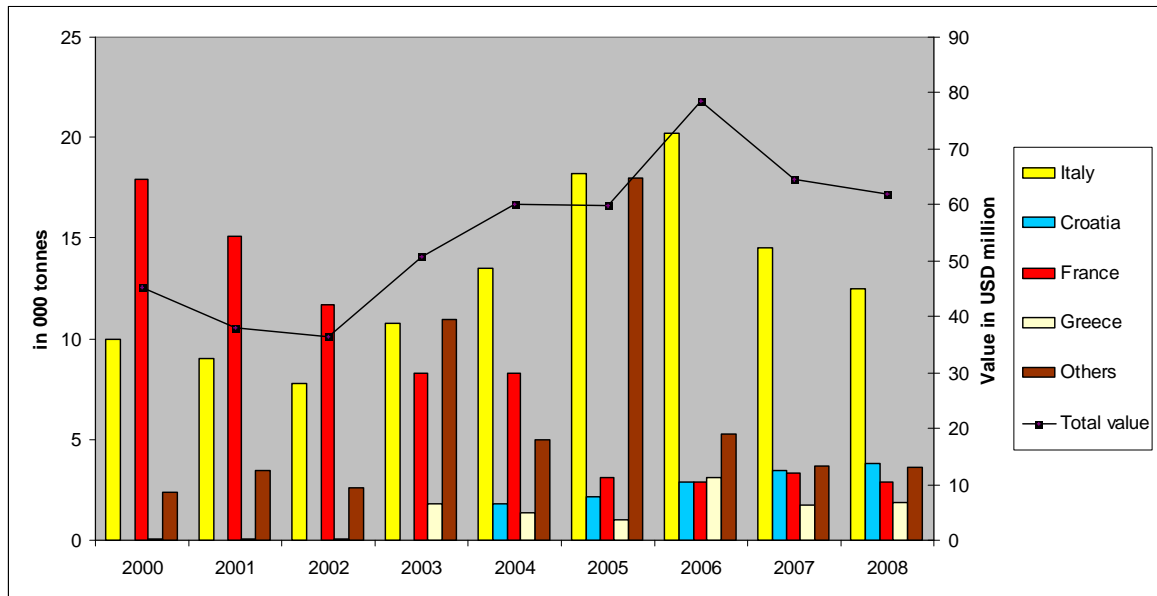
**Figure 11: World's export of anchovies by product forms**



The world's export of fresh and frozen anchovies went down from its highest record of 42 500 tonnes in 2005 to 24 700 tonnes in 2008. On contrast, the export value increased from USD 59.8 million to 62 million in the same period due to the growing prices.

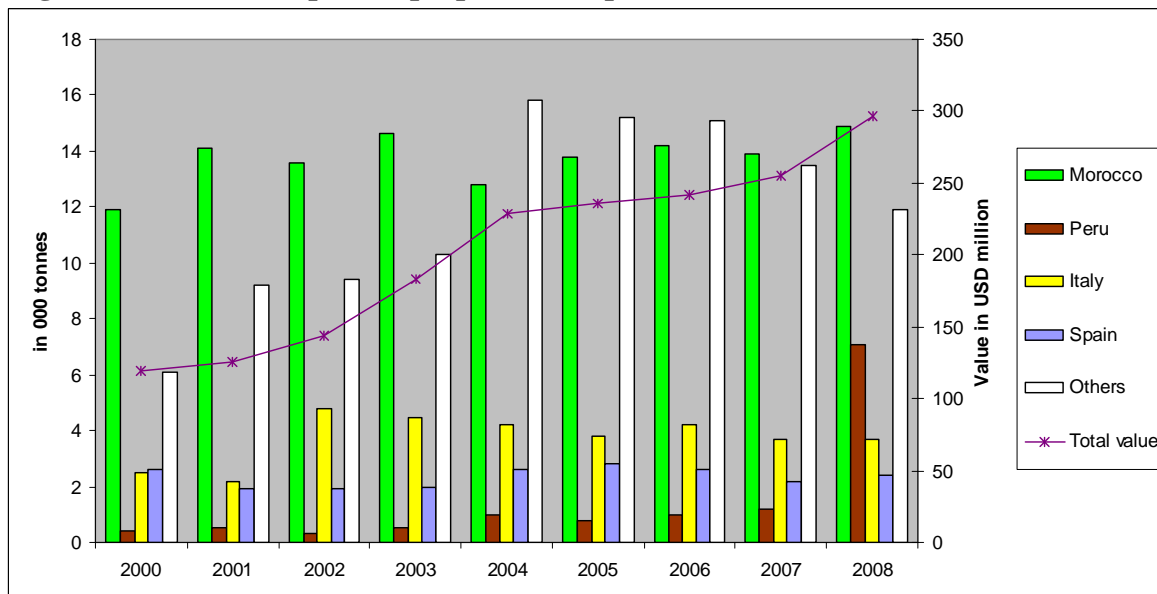
Italy is the largest exporter of fresh and frozen anchovies with 12 500 tonnes, followed by Croatia (3 800 tonnes), France (2 900 tonnes), Greece (1 900 tonnes) and other countries. Along with decreasing volumes, the export value of fresh and frozen anchovies showed a downwards tendency for some countries, except Croatia, Morocco and Turkey which increased their respective export values by 30%, 36% and 30% respectively in 2008 compared with the year before.

**Figure 12: World's export of fresh and frozen anchovies**



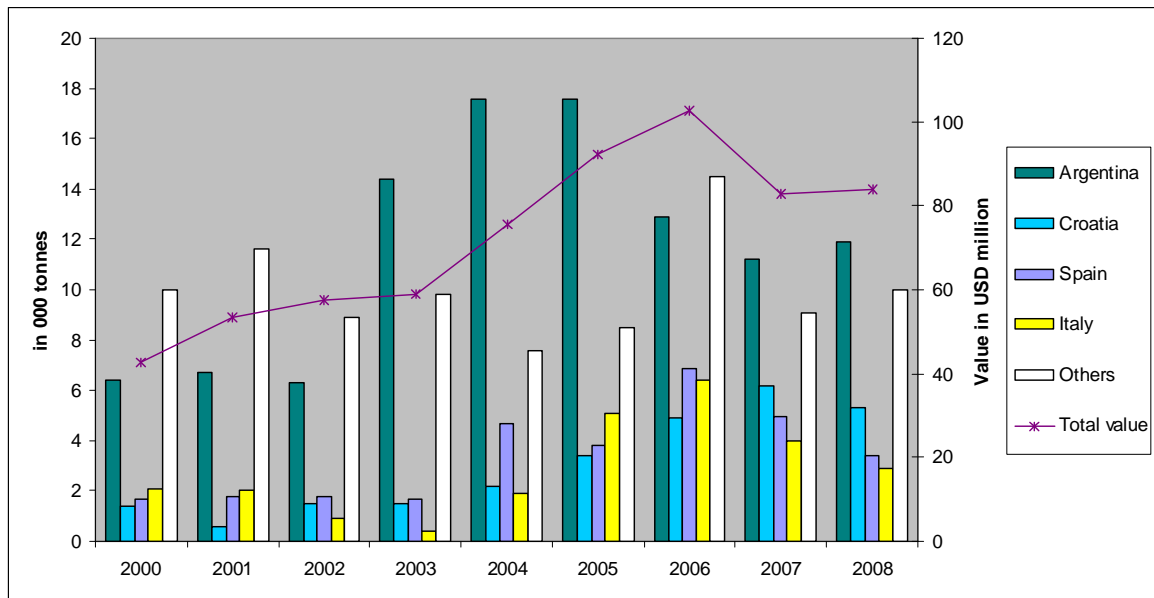
The world's export of prepared and preserved anchovies is on the rise. The total export of this category went up from 23 500 tonnes in 2000 to 40 100 tonnes in 2008. The value increased from USD 119.4 million in 2000 to USD 296.7 million respectively. Morocco was the largest exporter of prepared and preserved anchovies in 2008 with 14 900 tonnes, followed by Peru (7 100 tonnes), Italy (3 700 tonnes), Spain (2 400 tonnes) and other countries.

**Figure 13: World's export of prepared and preserved anchovies**



Argentina was the largest exporting country of salted anchovies with 11 900 tonnes in 2008. Croatia, Spain and Italy were the most important exporters of salted anchovies after Argentina with 5 300 tonnes, 3 400 tonnes and 2 900 tonnes respectively.

**Figure 14: World's export of salted anchovies**



## 4. Selected countries

In 2010, the largest EU consumers were Spain (23%), Italy (17%), the United Kingdom (16%), Germany (16%) and France (13%)<sup>10</sup>. These countries have been identified as some of the most interesting countries for export of Georgian anchovies due to the high demand for ready-to-eat preserved and prepared anchovy products.

### 4.1 Spain

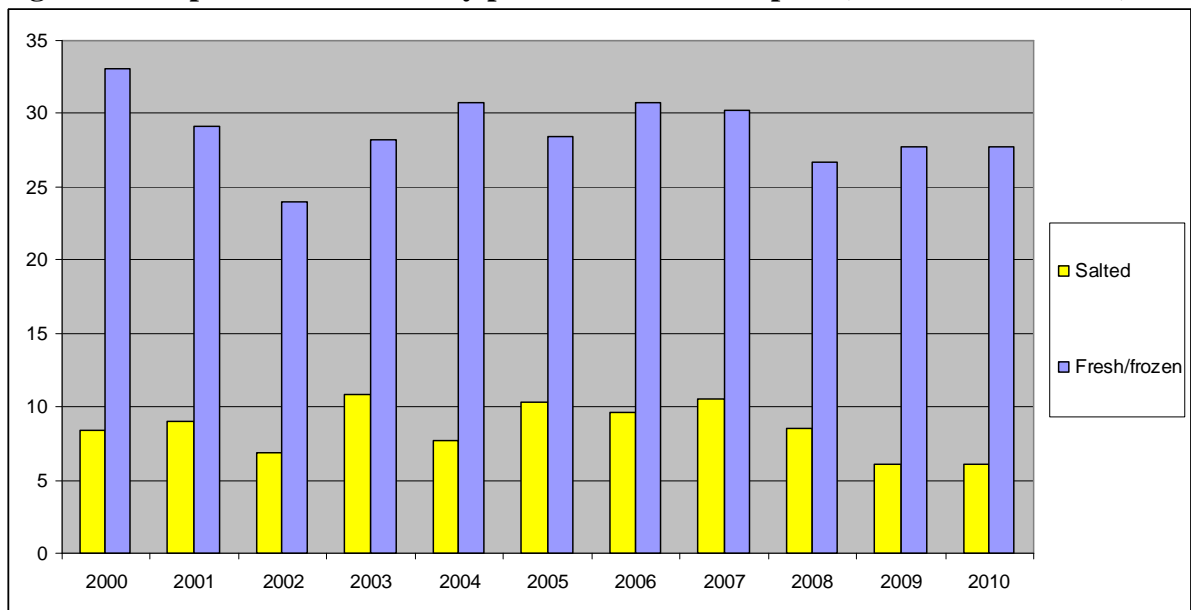
As one of the largest fishing nations in Europe, Spain determines traditional abundant consumption of fish and seafood and its character of produced seafood products. In Spain, anchovy is the 5<sup>th</sup> most popular fish; per capita consumption of anchovy was 2.7 kg in 2009. Though, consumer preferences show a considerable discrepancy depending on the regions. For example, in Andalusia and Cantabria, anchovy is the 2<sup>nd</sup> most preferred fish, whereas in Galicia and Catalonia it is hardly ever eaten. A special delicacy in Spain is boquerones, anchovies cured in a vinegar marinade. Spain is the largest importer of fresh and frozen and salted anchovies, and it is the third largest imported of prepared and preserved anchovies worldwide. In addition to popularity of the species and consistent consumption through the year, the high demand of anchovies in Spain is explained by the fact that the nationally caught anchovies are an endangered species, and the catch of anchovies in the Bay of Biscay is at an all-time low.

<sup>10</sup> CBI report “Promising markets for prepared and preserved fish”, 2012, [www.cbi.eu](http://www.cbi.eu)

Due to depleted stock level, the main European anchovy fishery in the Bay of Biscay had been closed for 4 years. In 2010, it opened, allowing French and Spanish fleets to fish again for anchovies, but the quota was set at 7 000 tonnes, but increased to 26 730 tonnes for Spain from July 2011. The total catching quota for anchovies in the Bay of Biscay was 29 700 tonnes<sup>11</sup>.

In 2010, Spain imported 33 800 tonnes of anchovies, of which 82% or 27 700 tonnes were fresh and frozen anchovies, while the rest 18% or 6 100 tonnes were salted anchovies. It should be noted that Spain also imports substantial volume of anchovies in the category “prepared and preserved”, but the statistics for this product form is available only until 2008, and therefore cannot be integrated in the graph until 2010. Nevertheless, Spanish imports of prepared and preserved anchovies during the period 2000-2008 boomed from 500 tonnes to 4 800 tonnes, so there is a strong outlook for this product category in Spanish trade. According to CBI report<sup>12</sup>, Spain imported 6 000 tonnes of prepared and preserved anchovies in 2010, so the growth in imported volumes of prepared and preserved anchovies from 2008 to 2010 was 25%. Spain has a large anchovies processing industry, and the most common way of processing anchovies is packing the salted anchovies fillets in olive oil. Traditional cans have been replaced by new easy open cans of 48 g to 800 g. The other popular packaging medium for salted anchovies is glass containers. An upcoming trend are sachets that are more environmental friendly than cans or glass jars, and another convenience of sachets is that transportation costs are lower.

**Figure 15: Imports of anchovies by product forms into Spain (in thousands tonnes)**



Concerning prices, the average price for prepared and preserved anchovies increased by 5.7% on average per year in the period 2005-2010, and was 5.89 EUR per kg. The

<sup>11</sup> “Anchovy catch quota increased”, [www.thefishsite.com](http://www.thefishsite.com), July 2011

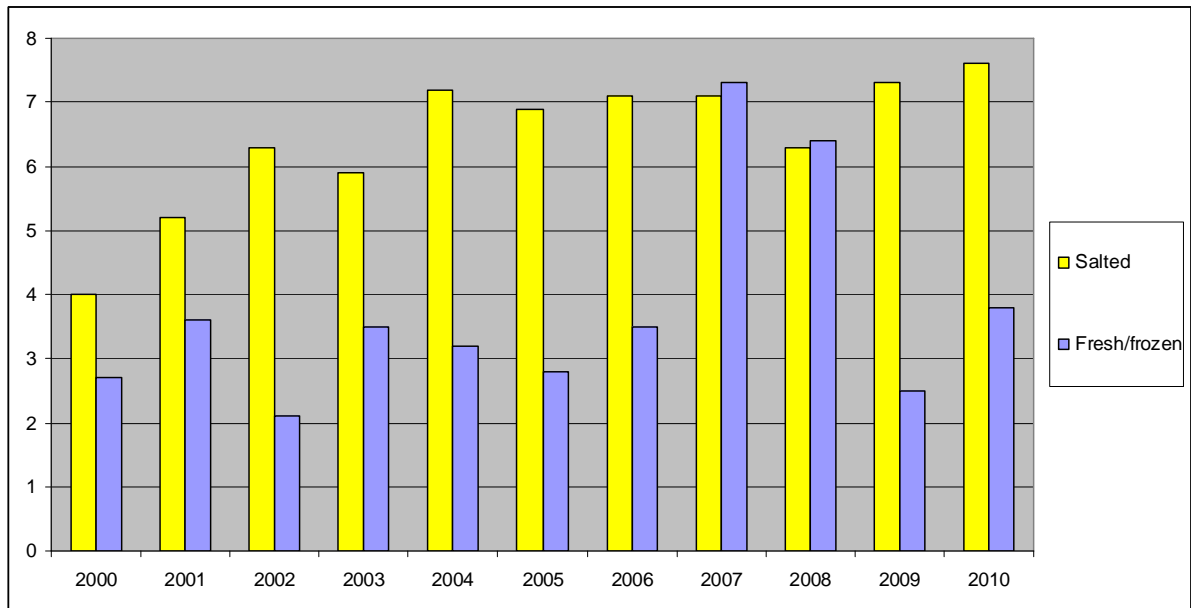
<sup>12</sup> CBI report “Prepared and preserved anchovies in Spain”, 2012, [www.cbi.eu](http://www.cbi.eu)

average price of imports from non-EU countries increased by 5.3% on average annual to 5.87 EUR per kg. Though, prices have decreased since 2009, when they were 6.21 EUR per kg. In comparison, the EU average import prices are 5.94 EUR per kg from all countries and 5.68 EUR per kg from non-EU countries, after an increase of 1% and 1.3% correspondingly on average per year since 2005.

## 4.2 Italy

As well as Spain, Italy is one of the largest consuming countries of anchovies in Europe, which consumed 14 000 tonnes of prepared and preserved anchovies in 2010<sup>13</sup>. Anchovies are an essential part of Italian cuisines, especially in the southern part of the country and prepared and preserved anchovies are used for numerous dishes such as pizza, pasta, salads, bruschetta, and other. Though, fresh anchovies can be also found in the retail sector, which are used for frying (“fritto misto”, a mix of various fried fish species). Per capita consumption of prepared and preserved anchovies in Italy was recorded at 2.4 kg per capita in 2009, which is higher than the EU average of 0.4 kg per capita per year.

**Figure 16: Imports of anchovies by product forms into Italy (in thousands tonnes)**



Italy is also the largest producing country of processed anchovies in the EU. In 2010 it produced 9 800 tonnes of prepared and preserved anchovies, which corresponds to 42% of all preserved anchovies produced in Europe. In the period 2008-2010, Italian production grew by an average of 29% a year. In 2010, Italy imported a total volume of 11 400 tonnes of fresh/frozen and salted anchovies, without taking into considerations

<sup>13</sup> CBI report “Market for prepared and preserved anchovies in Italy”, 2011, [www.cbi.eu](http://www.cbi.eu)



imports of prepared and preserved anchovies, which amounted to 8 200 tonnes in the same year.

Italy is the largest importer of prepared and preserved anchovies in the EU in 2010 bringing in a 32% of the total EU import of prepared and preserved anchovies. Italy is also the largest importer of prepared and preserved anchovies from non-EU countries. Imports from non-EU countries amounted to 7 500 tonnes (EUR 37 million in value and 36% of the total EU import). In the period 2005-2010, Italian imports of prepared and preserved anchovies from non-EU countries increased by 0.4% on average annually. The most important suppliers of prepared and preserved anchovies to Italy were Morocco (41%), Albania (25%) and Tunisia (17%). Italy exported 3 700 tonnes of prepared and preserved anchovies in 2010. Most was exported to Albania (33%), Australia (10%), Japan (7.8%), the USA (7.6%) and the UK (7.4%).

During 2005-2010, the average price of imported prepared and preserved anchovies grew by 0.4% on average annually and was EUR 5.40 per kg. The average price of imports from non-EU countries increased by 0.5% on average per year to EUR 5.25 per kg. However, in 2009-2010, the average price of imports from non-EU countries prices declined from EUR 5.60 per kg in 2009 to EUR 2.25 per kg. In comparison, the EU average import prices are EUR 5.94 per kg from all the countries and EUR 5.68 per kg from non-EU countries, after an increase of 1% and 1.3% respectively per year since 2005<sup>14</sup>.

### **4.3 Germany**

Whereas Italian and Spanish markets enjoy anchovies in their native cuisines, anchovies have been introduced on the German market due to the mentioned Mediterranean countries. As a North European market, German cuisine generally does not use a lot of fish, and anchovies appear mostly in Italian pastas, pizzas and Spanish appetizers. Prepared and preserved anchovies packed in glass jars, cans and vacuum package can be found in many hyper and supermarkets, especially those trading delicatessen products.

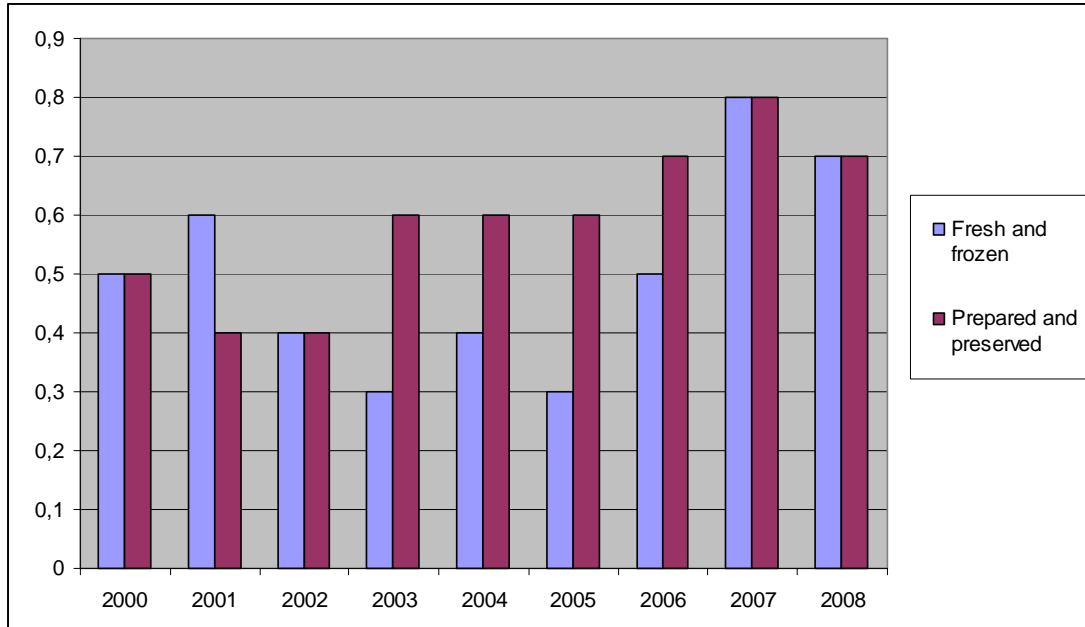
In 2008, Germany imported 1 400 tonnes of anchovies for the value of USD 13 million. In volume terms, fresh and frozen and prepared and preserved anchovies were imported in equal shares, by 700 tonnes for each category. In value terms, 84% of the total import value was made up by prepared and preserved anchovies (10 900 tonnes), while the rest of 16% was contributed by fresh and frozen anchovies (2 100 tonnes). In the period 2000-2008, the development of German imports of anchovies was positive, although the rate of growth had been modest. In 2000, Germany imported 500 tonnes of fresh and frozen and 500 tonnes of prepared and preserved anchovies, and in the next several years the share of prepared and preserved anchovies had tend to surpass the share of fresh and frozen category until 2007. In the years 2007-2008, the shares of both categories had been equal, with a slight downward trend in 2008.

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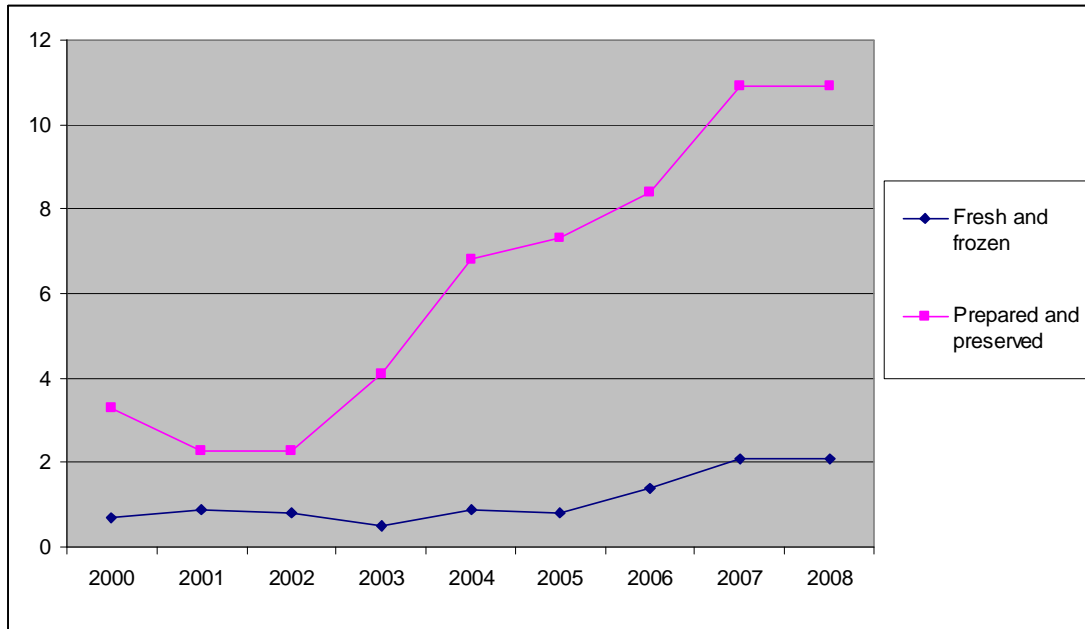
<sup>14</sup> CBI report "Prepared and preserved anchovies in Italy, 2011

In terms of value, the imports of prepared and preserved anchovies had been constantly growing after 2002 along with the volumes of this category until 2007. In the period 2007-2008 the value of German imports of prepared and preserved anchovies stabilized at USD 10.9 million.

**Figure 17: Imports of anchovies by product forms into Germany (in thousands tonnes)**



**Figure 18: Import of anchovies by product forms into Germany (value in USD million)**



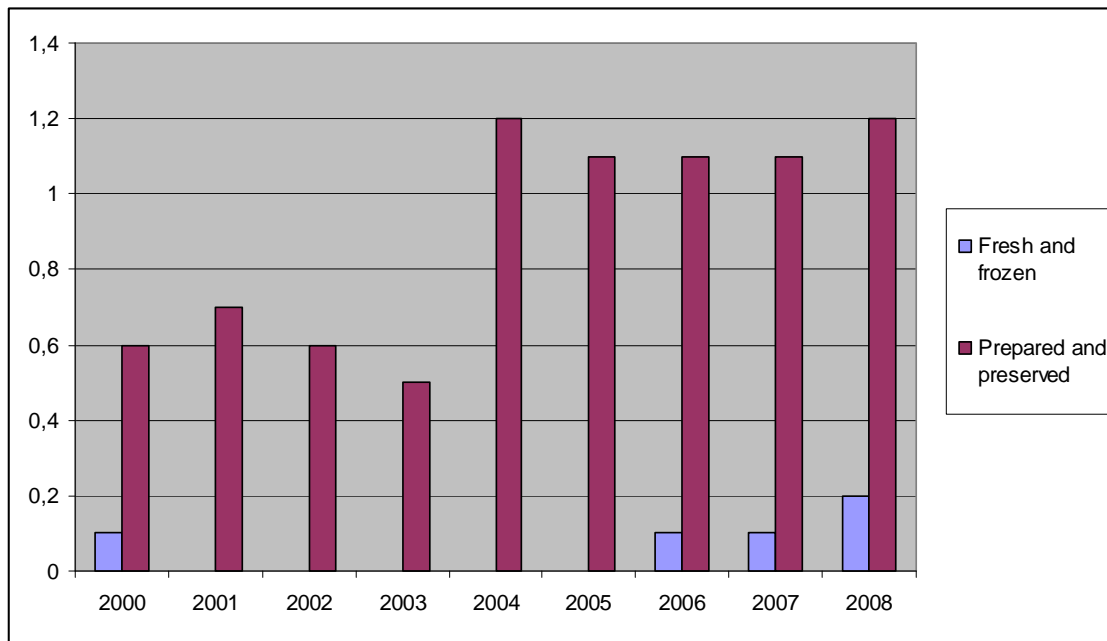
## 4.4 The United Kingdom

As well as in Germany, the UK consumption of anchovies is based on Mediterranean cuisine and is used in the dishes such as pizza topping, pasta, ingredients in Caesar salad, appetizers and sauces. Nevertheless, the pattern of anchovy imports in the UK is different from the German market. Both Germany and the UK import the same volumes of anchovy products (1 400 tonnes). However, while Germany imports equal volumes of fresh and frozen and prepared and preserved anchovies, the UK brings in mostly ready-to-eat prepared and preserved anchovy products.

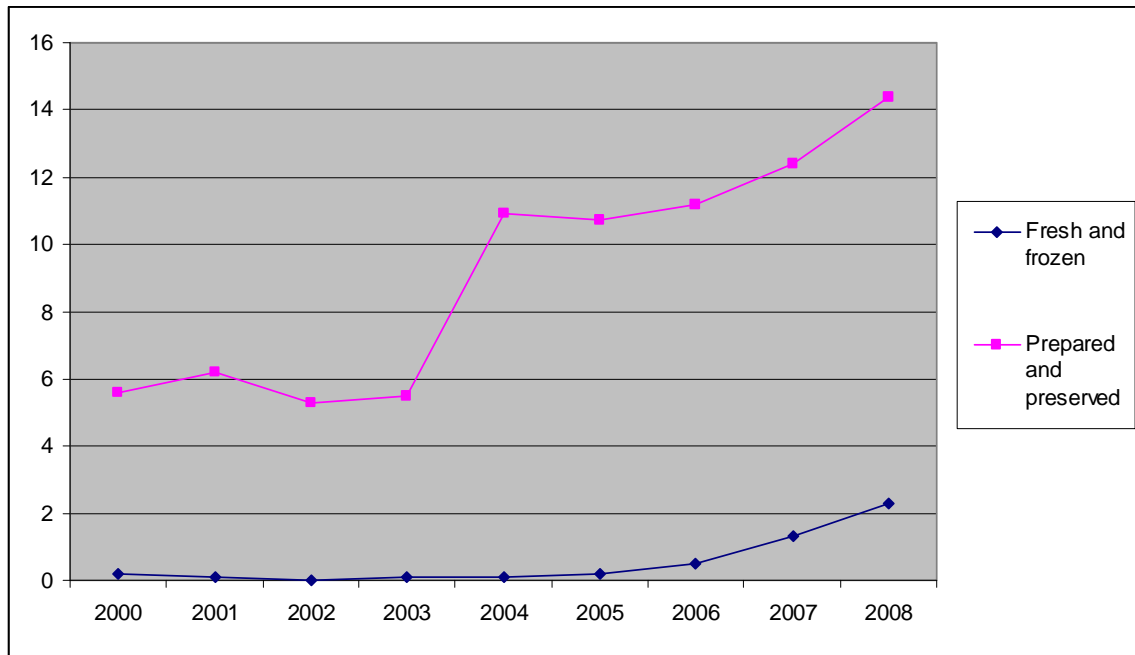
In 2008, the total imports of anchovy in the UK amounted to 1 400 tonnes, of which 86% or 1 200 tonnes were represented by prepared and preserved anchovy products. The rest 14% or 200 tonnes were made up by imports of fresh and frozen anchovies.

The total volume of the UK anchovy imports has doubled in the period 2000-2008 from 700 tonnes in 2000 to 1 400 tonnes in 2008. In terms of value, the UK imported anchovies for USD 16.7 million in 2008, up from USD 5.8 million in 2000. As shown in the figure 21 below, the main part of the value, 86% or USD 14.4 million, is made up by prepared and preserved anchovy products, while the rest 14% or USD 2.3 million is contributed by imports of fresh and frozen anchovies.

**Figure 19: Imports of anchovies by product forms into the UK (in thousands tonnes)**



**Figure 20: Imports of anchovies by product forms into the UK (value in USD million)**
















## 5. Product examples in the retail sector

In order to get a more detailed insight into the mentioned markets, it is interesting to compare availability of anchovy products and their product forms in the retail sectors in Spain, Italy, Germany and the UK. The following tables 2, 3, 4, and 5 below summarize selection of anchovy products from local super- and hypermarkets in the respective countries.













Spain has the largest number of anchovy products; in particular there were available 24 types of prepared and preserved anchovy items in a Carrefour supermarket in Madrid. A similar Carrefour supermarket in Italy offered 10 anchovy products, and 4 of them were presented in delicatessen department in free weight. However, Italian supermarket did not publish prices for its products online, on contrast with other stores in Spain, Germany and the UK.

The UK had a good choice of anchovy products in selected stores of Tesco and Sainsbury's, in particular, 6 and 9 products in the corresponding online stores. German store also offered selection of anchovy product, although it was smaller than in the UK. The German stores Kaufladen, Gourmantis and Lebensmittel offered by 2, 4 and 2 anchovy products in the respective supermarkets.

**Table 2: Assortment of anchovy products in Carrefour supermarket in Spain<sup>15</sup>**

 <p>grupo <b>carrefour</b> ESPAÑA</p>	 <p>Anchovy fillets in olive oil Glass jar of 53g. Price: 5,65 €</p>	 <p>Carrefour Selection Private label Cantabrian anchovy fillets in olive oil Box of 50 g. Price: 2,10 €</p>	 <p>Consortio Spiced anchovy Box of 29 g. Price: 2,35 €</p>
	 <p>Albo Anchovies in olive oil Box of 30 g. Price: 3,05 €</p>	 <p>Ortiz Cantabrian anchovy fillets in olive oil 'El Velero' Box of 47,5 g. Price: 2,89 €</p>	 <p>Ortiz Cantabrian anchovy fillets in olive oil 'El Velero' Box of 78 g. Price: 5,50 €</p>
	 <p>Ortiz Cantabrian anchovy fillets in olive oil 'El Velero' Glass jar of 95 g. Price: 6,25 €</p>	 <p>Consortio Limited edition of gourmet anchovies in olive oil Box of 29g Price: 4,90 €</p>	 <p>Royal Smoked anchovy Package of 100 g. Price: 4,55 €</p>
	 <p>Consortio Anchovy in olive oil Box of 252 g Price: 12,00 €</p>	 <p>Consortio Anchovy in olive oil Box of 185 g. Price: 18,90 €</p>	 <p>Ortiz Cantabrian anchovy in olive oil "a la antigua" 'El Velero' Glass jar of 95 g. Price: 6,25 €</p>

<sup>15</sup> [www.carrefour.es](http://www.carrefour.es) (January 2012)



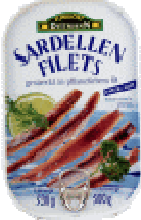







 <p>Carrefour Discount Private lable Anchovies fillets Box of 26 g. Price: 0,55 €</p>	 <p>Carrefour Cantabrian anchovy fillets in oil Package of 3 boxes by 50 g. Price: 2,70 €</p>	 <p>Isabel Anchovy fillets in olive oil Box of 50 g. Price: 1,62 €</p>
 <p>Carrefour Selección Cantabrian anchovy fillets Glass jar of 310 g. Price: 16,05 €</p>	 <p>Serrano Boquerones anchovies with garlic Box of 90 g Price: 3,70 €</p>	 <p>Carrefour private lable, Boquerones anchovies in olive oil Package of 100 g. Price: 1,57 €</p>
 <p>Carrefour Boquerones anchovies in Viniegra Package of 85 g. Price: 1,57 €</p>	 <p>Carrefour Selección Boquerones anchovies in Cantabrian vinegar – Box of 120 g. Price: 4,94 €</p>	 <p>Serrano Boquerones anchovy in vinegar: Box of 90g, Price: 3,15 €</p>
 <p>Usisa Boquerón anchovies in olive oil Box of 84 g Price: 1,62 €</p>	 <p>Serrano Boquerones anchovies in vinegar Box of 325 g Price: 7,31 €</p>	 <p>Carrefour Boquerones anchovies in vinegar Box of 270 g. Price: 4,45 €</p>

**Table 3: Selection of anchovy products in Carrefour supermarket in Italy<sup>16</sup>**

	<p>Salted anchovies</p> 	<p>Marinated anchovies</p> 
	<p>Anchovies with oil</p> 	<p>Salted anchovies</p> 
	<p>Marinated anchovies</p> 	<p>Delicious anchovies fillets (46g)</p> 
	<p>Anchovies Rizzoli under salt (850g)</p> 	<p>Delicious anchovies in a glass jar (150g)</p> 
	<p>Rolls of anchovies, Carrefour Discount (80g)</p> 	<p>Anchovies in olive oil Rizzoli (150g)</p> 








<sup>16</sup> [www.carrefour.it](http://www.carrefour.it) (January 2012)

**Table 4: Selection of anchovy products in several supermarkets in Germany**


	 <p>Anchovies fillets in oil, Dittman 95g, 125g. EUR 3,09</p>	 <p>Anchovies fillets in oil, Dittman extra zart, gestreckt in pflanzlichem Öl Abtropfgewicht: 500g Inhalt: 680ml EUR 8,99</p>
	<p>Anchovy fillets in oil</p>  <p>EUR 10.45, 95g,</p>	 <p>Delicious anchovy sauce EUR 4.25, 180g</p>
	 <p>Tapenade of green olives and anchovies fillets, 200g EUR 4,50</p>	 <p>Bizantina sauce with green olives, capers and anchovies, 370g, EUR 8,99</p>
	 <p>Dittmann – Anchovies fillets, 600g, 450g, EUR 10.82</p>	 <p>Dittmann, anchovy rolls in oil 106 ml, EUR 2,18</p>



**Table 5: Range of anchovy products in Tesco and Sainsbury's stores in the UK<sup>17</sup>**

	<p>Tesco Anchovy Fillets in Olive Oil (50g) 73p (£1.46/100g)</p> 	 <p>John West Anchovy Fillets in Olive Oil (100g) £1.67 (£1.67/100g)</p>	 <p>Tesco Ingredients Salted anchovy fillets in olive oil (250g) £4.99 (£2.00/100g)</p>
	 <p>John West Anchovy Fillets in Olive Oil (50g) £1.07 (£2.14/100g)</p>	 <p>Tesco Anchovy Fillets in Olive Oil (100g) £2.19 (£2.19/100g)</p>	 <p>Patum Peperium Gentleman's Relish Spiced Anchovy Relish (42.5g) Delicious on hot toast. £1.59 (£3.74/100g)</p>
	 <p>Sainsbury's Anchovy Fillets in Olive Oil with Garlic &amp; Herbs (50g) Contains 37% olive oil. 79p (£1.58/100g)</p>	 <p>Conservas Ortiz Anchovies with Capers (47.5g) Anchovies rolled with capers in olive oil. £3.95 (£8.32/100g)</p>	 <p>Sainsbury's Anchovy Fillets in Pure Olive Oil (100g) Contains 40% olive oil. £1.99 (£1.99/100g)</p>

<sup>17</sup> [www.tesco.com](http://www.tesco.com) and [www.sainsburys.com.uk](http://www.sainsburys.com.uk)

	 <p>Sainsbury's Taste the Difference Anchovy Fillets in Extra Virgin Olive Oil (114g) Deliciously plump, large anchovy fillets from Northern Spain packed in extra virgin olive oil for a wonderfully delicate flavour. £2.25 (£1.97/100g)</p>	 <p>La Monegasque Anchovy Fillets in Olive Oil with Garlic &amp; Herbs (100g) £2.53 (£2.53/100g)</p>	 <p>Admiral Anchovy Paste (56g) With olive oil. 99p (£1.77/100g)</p>
<p><b>Sainsbury's</b></p>	<p>Fragata Spanish Olives Stuffed with Anchovy (200g) 18 89p (44.5p/100g)</p> 	<p>Sainsbury's Marinated Anchovies (200g) In a citrus and garlic dressing.</p>  <p>£3.25 (£16.25/Kg)</p>	<p>Geo Watkins Anchovy Sauce (190ml)</p>  <p>£1.79 (94.2p/100ml)</p>

<sup>18</sup> <http://www.mysupermarket.co.uk/Shopping/FindProducts.aspx?Query=Anchovy&Store=Sainsburys>

## 6. Conclusions

Georgia has a rich resource of high quality anchovy in the Black Sea which has a good potential for development and creation more economical value for the country. Considering the transformation of the Georgian fisheries sector which already started for upgrading fishing fleet and processing sector capacities, there is a good opportunity to develop the industry for modern types of value-added anchovy products destined for export to the EU market. There is also potential for development of high quality fish meal, fish feed pellet production and other products for non-human consumption use.

The most attractive markets in Europe for anchovies trade are the established Southern and Western European countries due to their size and population, large trading capacity and growing demand for anchovy products regardless the pressure in the past years as a result of the economic crisis. Anchovies are the third most important products imported into Europe from non-EU countries after tuna and sardines. Especially the category of prepared and preserved anchovies form most of the value of the total European imports of anchovy products. Prepared and ready-to-eat anchovy products are on the rise due to the market need for convenience products.

Premiums for Georgian exporters may apply to modern added-value anchovy products or to sustainably certified anchovy products. In particular, modified atmosphere package, sachets and modern self-opened canned boxes have become more preferable by importers rather than traditional canned packs. The long preservability of most prepared and preserved fish products makes it possible also for distant countries to trade with the EU. As a result, the focus will largely be on price and non-EU countries generally have a cost advantage over EU competitors. In addition, sustainability is increasingly important on the European market. Some specialized importers will demand certified sustainable anchovies; however, most of importers will buy sustainable as well as non-sustainable anchovies. However, sustainable processed anchovies can mean an exclusive competitive advantage for Georgian anchovy industry. Sustainability certifications may assist Georgian producers and exporters of anchovies in selling their products or obtaining premium prices. For example, Marine Stewardship Council (MSC)<sup>19</sup>, offer a Sustainable Fishing Standard as well as a Chain of Custody Standard.

Europe has committed to the Codex Alimentarius<sup>20</sup> that provides food standards for fishery industry which was created by the FAO and the WHO to develop food standards, guidelines, and related texts such as code of practice under the joint FAO/WHO Food Standards Programme. The standards state requirements for quality, allowed food additives, sizes, packaging, marking, labeling, defects and applied standards depending on characteristics of the products<sup>21</sup>.

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<sup>19</sup> [www.msc.org](http://www.msc.org)

<sup>20</sup> [www.codexalimentarius.net](http://www.codexalimentarius.net)

<sup>21</sup> Codex Alimentarius “Current official standards”,  
[www.codexalimentarius.net/search/advanced.do?lang=en](http://www.codexalimentarius.net/search/advanced.do?lang=en)

Spain, Italy, Germany and the UK have been identified as potential countries for export of Georgian anchovy products. Despite the economical difficulties, Spain and Italy are the largest European consumers of anchovy products in the EU. These countries remain ones of the largest European importers of anchovy products, of both fresh and frozen, and prepared and preserved anchovy products. The United Kingdom and Germany are countries with the largest population and the largest number of consumers of prepared and preserved fish in the EU. Consumption of preserved anchovies is increasing every year which is reflected in generally positive imports of anchovy products into the UK and German markets.

The economic crisis has had an impact on the imports of prepared and preserved anchovies. Nevertheless, due to the economic recession, European distributors are increasingly focused on prices and with the tariff benefits from many non-EU countries and lower labor costs, this may be an opportunity to gain market share for Georgian companies. The main trade channels for Georgian exports to Europe are anchovy importing companies which distribute anchovies further to wholesalers, Ho-Re-Ca and retail sectors. Some of the most important companies in Spain, Italy, the UK and Germany are listed in the Annex 1.

Import tariffs play an important role in price developments for exporters to various countries. In case of export from third countries into the EU, the import tariff for prepared and preserved anchovies, including canned products (CN 16041600), is the highest of all anchovy products: 25%, according to the Council Regulation (EEC) R2658/87 of 23 July 1987 on the tariff and statistical nomenclature and on the Common Customs Tariffs<sup>22</sup> and Commission Regulation No 1006/2011 of 27 September 2011 amending Annex 1 to R 2658/87<sup>23</sup>. Salted anchovies, but not dried, smoked or in brine, (TARIC 0305630010) may be imported with a tariff 10%. However, Georgia can use the possibilities provided by the Council Regulation (EC) No 1062/2009<sup>24</sup> of 26 October 2009 opening and providing for the management of autonomous Community tariff quotas for certain fishery products for the period 2010 and 2012 and repealing Regulation (EC) No 824/2007, which establishes the annual autonomous quota of 5 000 tonnes with 0% customs duty for anchovies (*Engraulis anchoita*), salted or in brine, but not dried or smoked for processing (TARIC code 0305630010). This annual quota is set up for the period 2010 to 2012 and could be used by any importing country until the tariff quota has been used up.

In order to accelerate trade with non-EU countries, the European Union developed a system to promote trade with non-EU countries, “Generalized Scheme of Tariff Preferences (GSP) 2009-2011<sup>25</sup>”, where Georgia is a beneficiary country and is exempted

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<sup>22</sup> <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:31987R2658:en:NOT>

<sup>23</sup> <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:282:0001:01:EN:HTML>

<sup>24</sup> <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2009:291:0008:0011:EN:PDF>

<sup>25</sup> [http://europa.eu/legislation\\_summaries/external\\_trade/cx0003\\_en.htm](http://europa.eu/legislation_summaries/external_trade/cx0003_en.htm)

from import tariffs for export of several products. The Annex 2 of this report shows an example of existing tariffs for Georgian export of prepared and preserved anchovies into the EU.

This incentive of arrangement for sustainable development and good governance trade with the EU and Georgia may help the Georgian anchovy industry to acquire their market niche taking into account the necessary transformation of the national fishing and processing sectors.

## 7. Annex 1: Contact details of importing companies

Company	FirstName	LastName	Street	Country	Telephone	E-Mail	HomePage
Crustimex Seafood	Michael	Allgeier	Große Elbstrabe 133, Hamburg	Germany	+49 40 38 02020	sales@crustimex.de; mluedtke@crustimex.de	www.crustimex.de
Intertrade	Hogni	Sigurdsson	Ferdinand Str. 6, Hamburg	Germany	+49 40 30 09 66 - 66	ssigurdsson@intertrade.eu	www.intertrade-foods.com
Intertrade Sigurdsson & Partner GmbH	Michael	Allgeier	Ferdinand Str. 6, Hamburg	Germany	+49 40 335540	info@intertrade-foods.com	www.intertrade-foods.com
Terramore	Branka	Kramaric	Schillerstrasse 19, LAnggons	Germany	+49 6403 927649	info@terramore.com	www.terramore.com
Zamek-Meinhardt GmbH	Wolfgang	Meinhardt	Wittekindallee 16, Minden	Germany	+49 571 828866	zamek-meinhardt-gmbh@t-online.de	www.zamek-meinhardt-gmbh.de
Fiorital S.R.L.	Ivan	Zanet	Località Marittima - Fabbricato 114, Venezia	Italy	+39 0412 409 200	info@fiorital.com	www.fiorital.com
Stella srl	Nicola	Stella	Via Ticino, 54, San Giuliano Milanese (MI)	Italy	+39 02 98 284 304	stella@stellafoods.com	www.stellafoods.com
Ocoex de martinea nates	-	-	Garely del Camara, N4, 8°. P.O. Box 108, 39770 Laredo	Spain	+34 942 607 122	ocoex@ocoex.com	www.ocoex.com
Acemlo Barcelona, S.L.	Jose	Matas	Sant Fructuos, 80, 4 fl. 3, Barcelona	Spain	+34 610 430 953	acemlo@teleline.es	www.airtel.net
Bermepesca			Egidazu Kaia, Apdo. de Correos 50, Ondar	Spain	+34 943 604 212	alberto@bermepesca.com	www.bermepesca.com
Caladero S.L.	Carlos	Lopez	Ctra. Nacional, 232 Km, Zaragoza	Spain	+34 976 616 700	caladero@caladero.com	www.caladero.com
Comefino SL	Carlos	Guenaga	Arta Bide 1, POB 3, Ondarroa (Bizcaya)	Spain	+34 946 168379	comefino@fiab.es; cguenaga@comefino.com	www.comefino.com
Escuris -S. A. Bayuca S/N	Enrique	Dominguez	Diaz de Rabago, 52, Puebla del Caraminal,	Spain	+34 981 83 01 00	lso@jealsa.com; escuris@escuris.es	www.escuris.es

			Coruna				
Frioko S.A.	Daniel	Milnes	Avda. das Americas 3, Perillo, La Coruna	Spain	+34 981 613 737	fish@frioko.es	www.frioko.es
Pescados Videla, S.A.	Juan	Videla	Edificio Unifrisa, C/ Transversal 9, Mercabarna Barcelona	Spain	+34 932 626940	grupovidela@grupovidela.com;	www.grupovidela.com
Pescados y Mariscos Miguel Sanz, S.L.			Esnabide 76, Pasajes San Pedro	Spain	+34 943 397118	administracion@miguelsanzsl.com	www.miguelsanzsl.com
Pescafresca S.A.	Jose Antonio	Vazquez	Lonja de Altura, Almacen: 41-42, Vigo (Pontevedra)	Spain	+34 986 434209	joseantonio@pescafresca.es	www.pescafresca.es
Sagra Alimentaria S.A.	Bengt	Eliasser	Mercamadrid - Edif. Naves Industriales Of.D-11, Madrid	Spain	+34 915070862		
Tomafish, S.L.	Josep	Matas	Pav.Polivalent 1 Mod.1, Barcelona	Spain	+34 610 430953	tomafish@teleline.es	
Meridian Sea			West Park, Plymouth	United Kingdom	+44 870 2400172	info@meridian-sea.com	www.meridian-sea.com
SEAFARE Products Ltd.	Nigel	Bloxham	Unit 11+13, The Harbour, Paignton, Devon	United Kingdom	+44 1803 557746		
Select Europe Co.			Units 28-29, Batten Road, Downton, Wiltshire	United Kingdom	+44 870 777 3292	sales@select-europe.com	www.select-europe.com

# Annex 2: An example of imports tariffs for Georgian products (prepared and preserved anchovies) into the EU

The screenshot shows the 'TARIC Measure Information' page for Georgia (GE) with Goods nomenclature code 1604160000. The page is titled 'SECTION IV PREPARED FOODSTUFFS; BEVERAGES, SPIRITS AND VINEGAR; TOBACCO AND MANUFACTURED TOBACCO SUBSTITUTES' and 'CHAPTER 16 PREPARATIONS OF MEAT, OF FISH OR OF CRUSTACEANS, MOLLUSCS OR OTHER AQUATIC INVERTEBRATES'. Under '1604 Prepared or preserved fish; caviar and caviar substitutes prepared from fish eggs - Fish, whole or in pieces, but not minced', there is a sub-entry '1604 16 - - Anchovies'. The tariff schedule for '1604 16' is as follows:

Condition	Rate	Reference
ERGA OMNES (ERGA OMNES) - Third country duty (15-09-1994 - )	25.00 %	R2658/87
GSP + (incentive arrangement for sustainable development and good governance) (SPGE) - Tariff preference (01-01-2009 - 31-12-2013)	0 %	R0732/08
ERGA OMNES (ERGA OMNES) - Control on illegal, unreported and unregulated fishing (09-03-2011 - ) (CD590)		R1005/08

Additional information/Documents produced/Certificates and authorisations:  
 C673 Catch certificate  
 Y927 The declared goods are not concerned by Council Regulation (EC) No. 1005/2008 [Specific Help]



# Annex 3: An example of imports tariffs for Georgian products (salted anchovies) into the EU

The screenshot shows a web browser window displaying the TARIC Measure Information page for Georgia (GE) with goods nomenclature code 0305630010. The page is titled "TARIC measure information" and includes a navigation menu for the European Commission Taxation and Customs Union. The main content area lists the following details:

- Area:** Georgia - GE
- Goods nomenclature code:** 0305630010
- SECTION I:** LIVE ANIMALS; ANIMAL PRODUCTS
- CHAPTER 3:** FISH AND CRUSTACEANS, MOLLUSCS AND OTHER AQUATIC INVERTEBRATES
- 0305:** Fish, dried, salted or in brine; smoked fish, whether or not cooked before or during the smoking process; flours, meals and pellets of fish, fit for human consumption (TN084)
  - Fish, salted but not dried or smoked and fish in brine, other than edible fish offal
  - 0305 63:** - - Anchovies (*Engraulis* spp.)
    - 0305 63 00 10:** - - - *Engraulis anchoita*, for processing

Under the heading "ERGA OMNES (ERGA OMNES)", the following tariff measures are listed:

- Third country duty (01-01-2000 - ): **10.00 %** (R2204/99)
- Non preferential tariff quota under end use (01-01-2012 - 31-12-2012): **0 %** (EU001) (TM062) (Order number: 092770) (R1062/09)
  - [Show conditions]
- GSP + (incentive arrangement for sustainable development and good governance) (SPGE)
  - Tariff preference (01-01-2009 - 31-12-2013): **0 %** (R0732/08)
- ERGA OMNES (ERGA OMNES)
  - Control on illegal, unreported and unregulated fishing (01-01-2010 - ) (CD590) (R1005/08)
    - [Show conditions]

At the bottom of the page, a note for CD590 states: "Fishery products shall only be imported into the Community when accompanied by a catch certificate. Export of catches made by fishing vessels flying the flag of a Member State shall be subject to the validation of a catch certificate by the competent authorities of the flag Member State. Regulation (EC) No. 1005/2008. This only covers marine catches made from 1 January 2010. Products processed from catches obtained before 1 January 2010 do not need to be accompanied by a catch certificate even if they are imported to the EU after 1 January 2010."