

República Argentina

MARITIME FISHERIES
INDICATORS

February 2008

Secretariat of Agriculture, Livestock, Fisheries and Food
Undersecretariat of Fisheries and Aquaculture
National Department of Fisheries Planning
Department of Fisheries Economy

LANDINGS

Total Landings of Main Species:

Species	February 2008 t	Rate variation compared to the same period of the previous year (%)	Accrued in 2008 (until 02/29/08) t	Rate variation compared to the same period of the previous year (%)
Pink cuskeel (<i>Genypterus blacodes</i>)	2424	-20,2%	3913	-22,3%
Red porgy (<i>Sparus pagrus</i>)	586	77,5%	1153	69,0%
Chub mackerel (<i>Scomber japonicus</i>)	61	86,5%	670	374,2%
Tope shark (<i>Galeorhinus galeus</i>)	3	15,4%	3	-49,2%
White croaker (<i>Micropogonias furnieri</i>)	606	-69,0%	1026	-69,6%
Patagonian smoothhound (<i>Mustelus schmitti</i>)	635	-2,1%	1158	-14,5%
Flounder (<i>Paralichthys patagonicus</i>)	908	0,3%	1742	-9,6%
Patagonian hoki (<i>Macruronus magellanicus</i>)	8364	72,6%	13919	62,1%
Argentine hake (<i>Merluccius hubbsi</i>)	20038	-22,2%	34559	-22,0%
Patagonian toothfish (<i>Dissostichus eleginoides</i>)	4	-96,3%	5	-96,2%
Argentine sea bass (<i>Acanthistius brasiliensis</i>)	158	21,6%	475	-11,4%
Stripped weakfish (<i>Cynoscion guatucupa</i>)	1197	77,4%	1947	6,9%
Southern blue whiting (<i>Micromesistius australis</i>)	458	-24,1%	835	-61,3%
Argentine red shrimp (<i>Pleoticus muelleri</i>)	5	-99,7%	281	-93,7%
Argentine squid (<i>Illex argentinus</i>)	3465	-75,5%	3937	-73,9%
Patagonian scallops (<i>Zygochlamys patagónica</i>)	378	-56,7%	501	-66,9%
Group total	39290	-29,6%	66125	-27,5%
Total	46746	-24,8%	79102	-24,1%

Source: DNCP
Data updated to 03/10/2008

AVERAGE OF FISHING DAYS PER VESSEL

Type of vessels	February 2008	Rate variation compared to the previous month (%)	Rate variation compared to the same period of the previous year (%)
Trawlers	20,7	0,4%	0,8%
Coastal vessels	15,9	0,7%	-8,0%
Ice trawlers	21,8	24,4%	0,8%
Longliners	20,3		-24,4%
Jiggers	20,5		105,0%
Rada vessels	5,5	-42,8%	-43,9%
Surimi vessels	18,0	44,0%	-28,0%
Outriggers	3,2	-65,9%	30,4%
Total	15,5	-4,0%	8,4%

Source: DNCP

EMPLOYMENT

Employment in the fisheries sector and related services (provisionary data):

	December 2007	Rate variation compared to the previous month (%)	Rate variation compared to the same period of the previous year (%)
Jobs stated to the SIJP for an accrued period.	17.097	2,6%	-5,6%
Average gross salary with accrued Christmas bonus.	\$ 4.032	17,1%	1,2%

Source: own elaboration based on data of the Secretariat of Economic Policy.

EXPORTS

Exports sequenced by tariff items:

Tariff code	Description	January 2008		Rate variation compared to the same period of the previous year	
		t	Thousand U\$	t (%)	Thousand U\$ (%)
0301.	Live fish.	0	4	38,9%	38,9%
0302.	Fresh or chilled fish exc. fillets.	296	825	-68,8%	-68,8%
0303.	Frozen fish exc. fillets.	8.841	14.251	-15,2%	-15,2%
0304.	Fresh fillets and other fish meats.	8.273	24.183	-15,9%	-15,9%
0305.	Fish fit for human consumption, dried, salted or in brine, smoked fish/flours/meals and pellets.	3.306	5.454	-10,4%	-10,4%
0306.	Crustaceans.	1.357	9.321	-18,0%	-18,0%
0307.	Molluscs.	2.897	4.672	-26,9%	-26,9%
0511.91.00	Products not expressed in other chapters. Unfit for human consumption.	7	190	40,0%	40,0%
1504.	Fats and oils of fish or marine mammals.	111	115		
1603.	Extracts and juices of fish, crustaceans, molluscs and other aquatic invertebrates.	15	63	50,0%	50,0%
1604.	Prepared or preserved fish.	210	580	79,4%	79,4%
1605.	Prepared or preserved seafood.	18	126	28,5%	28,5%
2301.20	Flours, meals and pellets. Unfit for human consumption.	7.409	5.232	135,1%	135,1%
Total		32.740	65.016	-3,2%	-10,2%

Source: own elaboration based on INDEC data

EXPORTS

Exports of Argentine hake.

Tariff code	Description	January 2008			Rate variation compared to the same period of the previous year		
		t	Thousand U\$S	Average price U\$S/kg	t (%)	Thousand U\$S (%)	Average price (%)
0302.69.10.100P	Fresh or chilled Argentine hake.	205	590	2,878	-69,8%	-46,0%	78,8%
0303.78.00.110D	Frozen Argentine hake in packages of 1kg or less.	1	4	4,000	-87,5%	-69,2%	146,1%
0303.78.00.190E	Frozen Argentine hake, others.	3.476	6.085	1,751	-4,1%	13,8%	18,7%
0304.20.10.110Q	Argentine hake fillets without fat in packages of 1 kg or less.	97	603	6,216	21,2%	43,5%	18,4%
0304.20.10.210W	Argentine hake fillets exc. without fat, in packages of 1 kg or less.	130	385	2,962	-30,8%	-17,2%	19,7%
0304.20.10.911L	Argentine hake fillets without fat in packages of more than 1 kg.	208	729	3,505	-21,8%	-30,2%	-10,7%
0304.20.10.912N	Argentine hake fillets with fat in packages of more than 1 kg.	5.048	14.555	2,883	-6,7%	20,5%	29,2%
0304.90.00.110E	Argentine hake steaks and/or slices.	13	112	8,615	-68,2%	-9,6%	184,8%
0304.90.00.910Y	Other Argentine hake preparations.	63	103	1,635	-60,3%	-47,1%	33,3%
Argentine hake total		9.241	23.166	2,507	-11,6%	11,5%	26,2%

Source: own elaboration based on INDEC data

EXPORTS

Patagonian hoki exports.

Tariff code	Description	January 2008			Rate variation compared to the same period of the previous year		
		t	Thousand US\$	Average price US\$/kg	t (%)	Thousand US\$ (%)	Average price (%)
0303.79.46.900Q	Frozen Patagonian hoki, the others (more than 1 kg.).	1.497	1.870	1,249	89,9%	110,1%	10,6%
0304.20.90.300B	Patagonian hoki fillets in packages of more than 1 kg.	1.187	2.719	2,291	33,9%	57,1%	17,3%
Patagonian hoki total		2.684	4.589	1,710	60,3%	75,1%	9,26%

Source: own elaboration based on INDEC data

Surimi exports.

Tariff code	Description	January 2008			Rate variation compared to the same period of the previous year		
		t	Thousand US\$	Average price US\$/kg	t (%)	Thousand US\$ (%)	Average price (%)
0304.90.00.300M	Surimi.	53	131	2,472	-94,7%	-93,1%	29,5%
1604.20.90.100U	Prepared surimi in airtight containers of 1 kg or less.	26	48	1,846			
Surimi total		79	179	2,266	-92,1%	-90,7%	18,7%

Source: own elaboration based on INDEC data

EXPORTS

Shad exports.

Tariff code	Description	January 2008			Rate variation compared to the same period of the previous year		
		t	Thousand U\$S	Average price U\$S/kg	t (%)	Thousand U\$S (%)	Average price (%)
0303.79.51.900M	Frozen shad in packages of 1 kg or more.	569	478	0,840	-57,0%	-33,6%	54,6%
Shad total		569	478	0,840	-57,0%	-33,6%	54,6%

Source: own elaboration based on INDEC data

EXPORTS

Shrimps exports.

Tariff code	Description	January 2008			Rate variation compared to the same period of the previous year		
		t	Thousand U\$S	Average price U\$S/kg	t (%)	Thousand U\$S (%)	Average price (%)
0306.13.91.911F	Whole shrimps in packages of 1 kg or less.	101	750	7,426	-57,9%	-60,1%	-5,1%
0306.13.91.919Y	Whole shrimps in packages of more than 1kg.	1.177	8.025	6,818	-8,1%	-8,5%	-0,3%
Whole shrimps total		1.278	8.775	6,866	-16,0%	-17,6%	-1,9%
0306.13.99.110W	Shrimps exc. whole in packages of 1 kg or less.	5	38	7,600	-54,5%	-42,4%	26,6%
0306.13.99.190X	Shrimps exc. whole in packages of more than 1 kg.	57	405	7,105	-27,8%	-37,6%	-13,5%
Shrimps exc. whole total		62	443	7.145	-31,1%	-38,0%	-10,0%
Shrimps total		1.340	9.218	6,879	-16,8%	-18,9%	-2,4%

Source: own elaboration based on INDEC data

EXPORTS

Argentine squid exports.

Tariff code	Description	January 2008			Rate variation compared to the same period of the previous year		
		t	Thousand U\$S	Average price U\$S/kg	t (%)	Thousand U\$S (%)	Average price (%)
0307.99.00.120W	Tubes or sheaths.	1.384	2.331	1,684	84,7%	71,2%	-7,3%
0307.99.00.130Z	Squid rings in packages of 1 kg or less.	4	10	2,500			
0307.99.00.140C	Squid rings in packages of more than 1 kg.	44	99	2,250	69,2%	54,6%	-8,6%
0307.99.00.161L	Tentacles.	47	49	1,043	-47,7%	-26,8%	40,1%
0307.99.00.162N	Fins.	239	109	0,456	469,0%	373,9%	-16,7%
0307.99.00.190U	The others (including whole)	927	610	0,610	-51,3%	-47,0%	8,9%
Argentine squid total		2.645	3.208	1,213	-6,0	20,2%	27,9%

Source: own elaboration based on INDEC data

EXPORTS

2007 exports of white croaker products.

Product	By-product	t	Thousand U\$S	Average price U\$S/kg	Share U\$S (%)
Frozen meats	Ready bread	218	275	1,259	1,1%
Whole	Frozen	28.544	21.640	0,758	85,2%
	Fresh	0	0	2,600	0,0%
Gutted	Frozen	807	964	1,194	3,8%
Frozen fillets	Skinless and with few spines	316	864	2,737	3,4%
Fresh fillets	Skinless and with few spines	0	0	4,000	0,0%
H&G	Frozen	869	1.670	1,921	6,6%
Total		30.755	25.413	0,826	

Source: own elaboration based on customs data.

EXPORTS

2007 exports of shrimps products.

Product	By-product	t	Thousand U\$S	Average price U\$S/kg	Share U\$S (%)
Whole	L2	13.417	93.306	6,955	35,7%
	L3	13.139	74.681	5,684	28,6%
	L1	5.836	47.984	8,222	18,3%
	L4	5.944	30.611	5,150	11,7%
	Unidentified	1.552	11.440	7,369	4,4%
	L5	857	3.481	4,062	1,3%
Group total		40.746	261.503	6,418	
Excluding whole	C1	1.434	12.078	8,421	39,7%
	C2	828	5.724	6,913	18,8%
	Broken	955	4.235	4,437	13,9%
	Pulp	637	3.757	5,900	12,4%
	Unidentified	424	3.198	7,547	10,5%
	Head	112	870	7,801	2,9%
	C3	93	537	5,752	1,8%
Group total		4.482	30.399	6,782	
Preparations		0	0	4,005	100,0%
Group total		0	0	4,005	
Total		45.228	291.902	6,454	

Source: own elaboration based on customs data.

EXPORTS

2007 exports of flounder products.

Product	By-product	t	Thousand U\$S	Average price U\$S/kg	Share U\$S (%)
Frozen meats	Others	0	0	0,600	100,0%
Group total		0	0	0,600	
Whole	Frozen	36	25	0,681	100,0%
Group total		36	25	0,681	
Gutted	Frozen	10	28	2,835	78,0%
	Fresh	2	8	4,743	22,0%
Group total		12	36	3,111	
Frozen fillets	With few spines	2.061	6.887	3,341	59,9%
	Skinless and with few spines	786	3.112	3,961	27,0%
	Skinless and with few spines	266	1.105	4,151	9,6%
	Skinless and without spines	68	391	5,779	3,4%
	Skinless, with few spines and without fat	1	8	6,141	0,1%
	Skinless and without spines and fat	0	2	7,000	0,0%
Group total		3.183	11.505	3,615	
Fresh fillets	Skinless	64	406	6,382	93,9%
	Skinless and without spines	1	14	9,732	3,3%
	Unidentified	3	10	3,822	2,4%
	Skinless and with few spines	0	2	7,404	0,4%
Group total		68	433	6,355	
H&G	Frozen	39	59	1,510	100,0%
Group total		39	59	1,510	
Total		3.338	12.058	3,613	

Source: own elaboration based on customs data.

EXPORTS

2007 exports of Patagonian Hoki products.

Product	By-product	t	Thousand U\$	Average price U\$S/kg	Share U\$S (%)
Frozen meats	Wings/collars	72	229	3,177	51,8%
	"Cocochas"	16	181	11,304	41,0%
	Cheek	3	24	8,463	5,5%
	Head	13	7	0,540	1,6%
	Others	0	1	5,790	0,2%
	Neck	0	0	1,198	0,0%
Group total		104	442	4,235	
Frozen fillets	Skinless and with few spines	19	54	2,750	59,9%
	With few spines	7	35	5,000	39,5%
	Skinless and without spines and fat	0	1	3,040	0,6%
Group total		27	89	3,346	
H&G	Frozen	1.586	6.778	4,273	100,0%
Group total		1.586	6.778	4,273	
Total		1.717	7.309	4,256	

Source: own elaboration based on customs data.

2007 exports of scallops products.

Product	By-product	t	Thousand U\$	Average price U\$S/kg	Share U\$S (%)
Callos	Unclassified	3.392	18.089	5,333	35,6%
	120-150 pieces per kg	1.679	10.419	6,204	20,5%
	More than 150 pieces per kg	1.745	10.204	5,846	20,1%
	80-120 pieces per kg	1.090	7.728	7,091	15,2%
	60-80 pieces per kg	437	4.268	9,760	8,4%
	Up to 60 pieces per kg	20	172	8,757	0,3%
Group total		8.363	50.879	6,084	
Meat		0	0	5,000	100,0%
Group total		0	0	5,000	
Total		8.363	50.879	6,084	

Source: own elaboration based on customs data.

EXPORTS

2007 exports of skates products

Product	By-product	t	Thousand U\$S	Average price U\$S/kg	Share U\$S (%)
Frozen meats	Wings/collars	6.995	15.661	2,239	93,0%
	Fillets	178	871	4,891	5,0%
	Cheeks	65	219	3,386	1,0%
Group total		7.238	16.751	2,314	
Dried cartilage		62	1.121	18,045	100%
Group total		62	1.121	18,045	
Whole	Frozen	3.720	5.249	1,411	100%
Group total		3.720	5.249	1,411	
Frozen fillets	Skinless and without spines	11	62	5,890	100%
Group total		11	62	5,890	
H&G	Frozen	34	62	1,818	100%
Group total		34	62	1,818	
Unidentified	Frozen	26	74	2,824	
Group total		26	74	2,824	
Total		11.090	23.321	2,103	

Source: own elaboration based on customs data.

2007 exports destinations of Argentine squid.

	Destination	Thousand U\$S	Share U\$S (%)	Accrued share (%)
1	Spain	49.209	42,7%	42,7%
2	China	23.186	20,1%	62,8%
3	Japan	9.441	8,2%	71,0%
4	Italy	8.710	7,6%	78,5%
5	Russia	5.150	4,5%	83,0%
6	Brazil	3.246	2,8%	85,8%
7	Korea Rep.	2.668	2,3%	88,1%
8	Venezuela	2.642	2,3%	90,4%
9	U.S.A.	1.308	1,1%	91,5%
	Others	9.762	8,5%	100,0%
	Total	115.320		

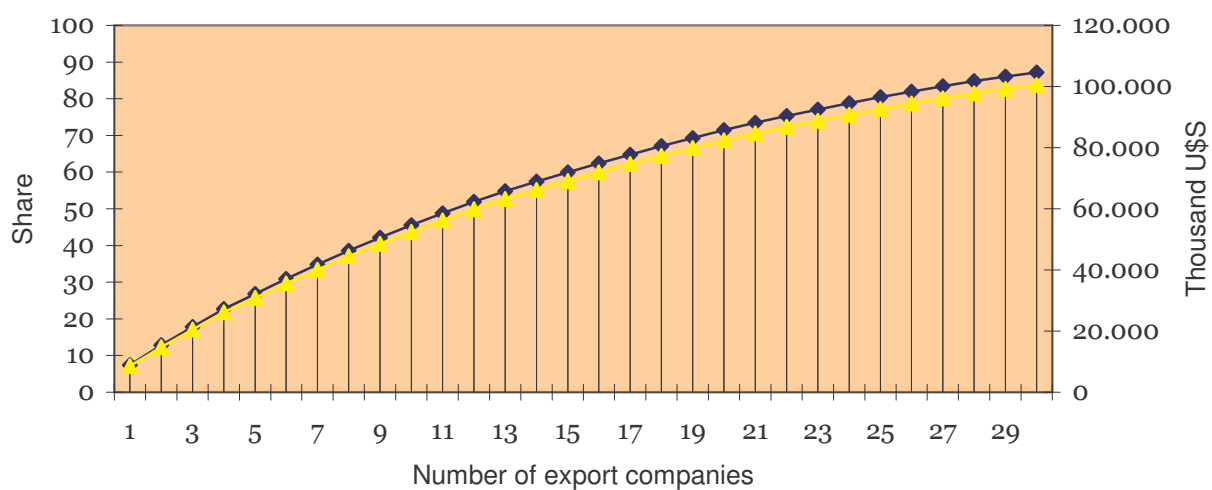
Source: own elaboration based on customs data.

2007 exports companies of Argentine squid.

Exporters	t	Thousand U\$S	Share U\$S (%)	Accrued share (%)
From 1 to 5	43.462	30.916	26,8%	26,8%
From 6 to 10	25.977	21.594	18,7%	45,5%
From 11 to 15	20.264	16.585	14,4%	59,9%
From 16 to 20	16.301	13.287	11,5%	71,4%
From 21 to 25	15.208	10.317	8,9%	80,4%
From 26 to 30	10.061	7.775	6,7%	87,1%
Remaining companies	18.119	14.846	12,9%	100,0%
Total	149.392	115.320		

Source: own elaboration based on customs data.

2007 Argentine squid exports of the 30 main companies



EXPORTS

2007 exports destinations of shrimps.

	Destination	Thousand U\$S	Share U\$S (%)	Accrued share (%)
1	Spain	205.453	70,4%	70,4%
2	Italy	67.280	23,0%	93,4%
3	Japan	6.869	2,4%	95,8%
4	Greece	2.932	1,0%	96,8%
5	U.S.A.	2.614	0,9%	97,7%
6	France	1.776	0,6%	98,3%
	Others	4.979	1,7%	100,0%
	Total	291.902		

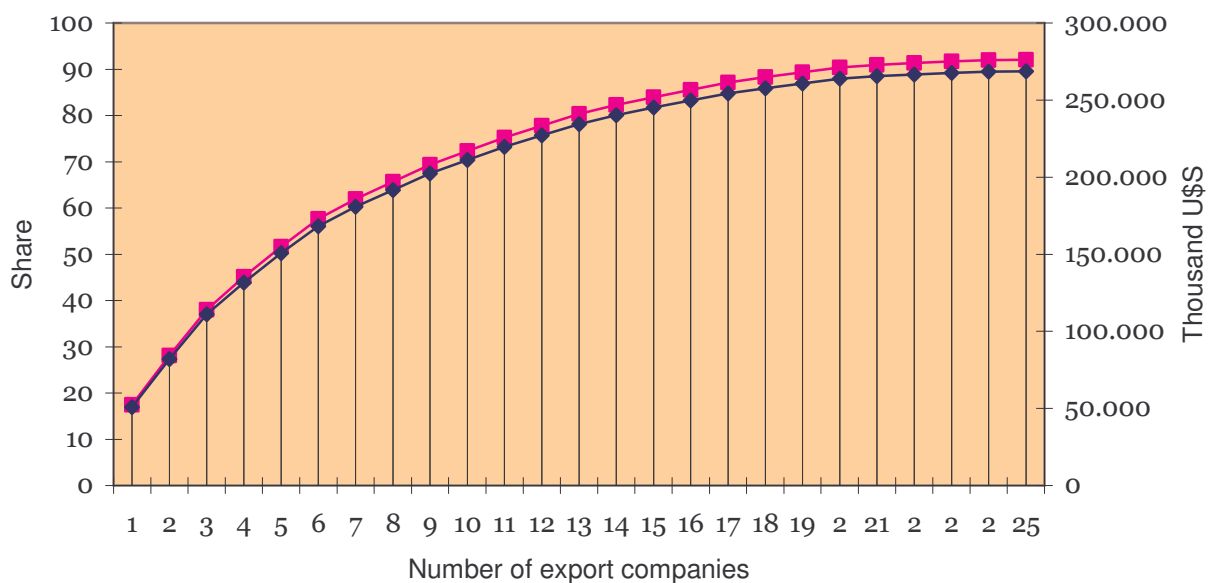
Source: own elaboration based on customs data.

2007 companies exports of shrimps.

Exporters	t	Thousand U\$S	Share U\$S (%)	Accrued share (%)
From 1 to 5	23.869	150.793	51,7%	51,7%
From 6 to 10	9.128	60.274	20,6%	72,3%
From 11 to 15	5.185	34.065	11,7%	84,0%
From 16 to 20	2.926	18.675	6,4%	90,4%
From 21 to 25	727	4.888	1,7%	92,0%
Remaining companies	3.394	23.207	8,0%	100,0%
Total	45.228	291.902		

Source: own elaboration based on customs data.

2007 shrimps exports of the 25 main companies



EXPORTS

2007 exports destinations of Argentine hake.

	Destination	Thousand U\$S	Share U\$S (%)	Accrued share (%)
1	Brazil	68.738	21,0%	21,0%
2	Spain	48.233	14,8%	35,8%
3	Italy	34.820	10,7%	46,4%
4	U.S.A.	26.661	8,2%	54,6%
5	Germany	17.729	5,4%	60,0%
6	Israel	13.913	4,3%	64,3%
7	Russia	11.442	3,5%	67,8%
8	France	11.362	3,5%	71,3%
9	Ukraine	9.273	2,8%	74,1%
10	Poland	9.259	2,8%	76,9%
11	Uruguay	9.077	2,8%	79,7%
12	Australia	8.562	2,6%	82,3%
13	Lithuania	6.926	2,1%	84,4%
14	Japan	4.436	1,4%	85,8%
15	Portugal	4.144	1,3%	87,1%
	Others	42.282	12,9%	100,0%
	Total	326.857		

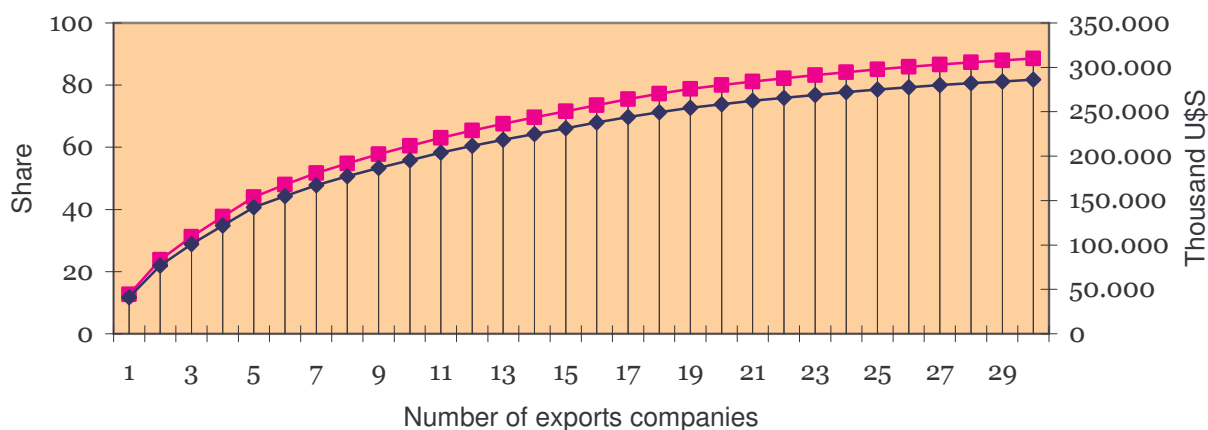
Source: own elaboration based on customs data.

2007 companies exports of Argentine hake.

Exporters	t	Thousand U\$S	Share U\$S (%)	Accrued share (%)
From 1 to 5	52.668	142.274	43,5%	43,5%
From 6 to 10	25.671	53.035	16,2%	59,8%
From 11 to 15	16.336	36.074	11,0%	70,8%
From 16 to 20	14.746	27.141	8,3%	79,1%
From 21 to 25	6.778	16.571	5,1%	84,2%
From 26 to 30	4.920	11.055	3,4%	87,5%
Remaining companies	17.681	40.708	12,5%	100,0%
Total	138.800	326.857		

Source: own elaboration based on customs data.

2007 Argentine hake exports of the 30 main companies



PRICES

GBA costumer price index. Base: 1999=100.

	February 2008	Rate variation compared to the previous month	Rate variation compared to December 2007
General level	205,33	0,5%	1,4%
Food and beverage	237,16	1,1%	1,8%
Fresh Argentine hake fillet (kg)	\$ 15,45	3,2%	7,6%
Chub mackerel (250 g can)	\$ 5,00	0,8%	1,8%

Source: INDEC

Wholesale price index. Base: 1993=100.

	February 2008	Rate variation compared to the previous month	Rate variation compared to December 2007
Domestic wholesale prices	331,64	0,8%	1,6%
Fisheries	408,58	0,8%	15,0%
Pink cuskeel		-	
Argentine anchovy		-	
Chub Mackerel		-	
Flounder		15,0%	
Argentine hake		-1,7%	
White croaker		-4,8%	

Source: INDEC

GUIDE PRICES

Exports prices.

Species	Description	February 2008 U\$/t
Argentine hake	H&G (500-800 g).	1.800/2.000
	H&G (800-1200 g).	1.950/2.200
	H&G (1200-1500 g).	2.350/2.500
	Fillets (100-200 g), interleaved, with few spines, skinless.	2.500/3.400
Pink cuskeel	H&G (500-800 g).	3.350
	H&G (800-1500 g).	3.950
	H&G (1500-2000 g).	4.600
	H&G (2000-3000 g).	5.000
Argentine anchovy	In barrels, in brine headed and gutted.	1.600/3.300
Patagonian hoki fillets	Skinless, without spines, without parasites.	1.630/2.600
Shrimps	L1.	7.000/8.500
	L2.	6.000/7.500
	C1, Headless.	8.000/10.000
	C2, Headless.	7.500/8.500
Argentine squid	Whole.	600/830
	Sheath.	900/1.500
	Tube.	1.400/2.200
White croaker	Whole, frozen (300-500 g).	650/850

Source: own elaboration based on AFIP data