Welcome to the First World Caviar Forum
Agenda

1. Welcome speech
2. Who’s your host?
3. Global caviar production, data collection by Paolo Bronzi
4. Caviar labelling, the FEAP issue
5. EUMOFA Report, The Caviar Market
6. China’s production and market
7. Any other business
Thank you for your presence!
Who’s your host?

Benoît Thomassen, Bio-engineer specialized in Aquaculture

Representative of the fish farmers of Wallonia

Member of FEAP

Chairman of the FEAP Sturgeon Commission since last December

First World Caviar Forum – May 7, 2019 - Brussels
Background of this Forum

Former meetings organized by Dr Alan Jones during the Seafood with European caviar producers

Last meeting in 2016 and creation of the FEAP Sturgeon Commission (same year)

→ problem: meetings only open to national representative organizations

→ not all caviar producers are affiliated with a member organization of FEAP!

Need to organize an annual meeting open to producers from all over the world
Global caviar production, data collection by Paolo Bronzi

First World Caviar Forum – May 7, 2019 - Brussels
# Production data, Europe

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<td>Total Europe</td>
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<td>160</td>
<td>154,1</td>
<td>176,5</td>
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<th>Total FEAP countries</th>
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<th>117</th>
<th>146,5</th>
<th>136,5</th>
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<td>94,4</td>
<td>91,6</td>
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<td>92,1</td>
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### Production data, World

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<td><strong>Total world</strong></td>
<td>262</td>
<td>331</td>
<td>362</td>
<td>380</td>
<td>500</td>
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</table>

Europe/World (%)  
China/World (%)  

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Caviar labelling, the FEAP issue

First World Caviar Forum – May 7, 2019 - Brussels
Caviar labelling, the FEAP issue

Facts list:

- EU is the bigger market for caviar
- Only CITES code as mandatory mentions on label of cans
- Extremely hard to read (or understand for casual buyers)
- The majority of the caviar produced outside the EU is not sold under the primary producer brand but is repacked in European facilities under another name (what is called repacking)
- Big loss of information (and misunderstandings)

Why?
Caviar labelling, the FEAP issue

Not repacked caviar label:

<table>
<thead>
<tr>
<th>Species code</th>
<th>Country of origin</th>
<th>Processing plant identification number</th>
</tr>
</thead>
<tbody>
<tr>
<td>HUS / C / CN / 2017 / xxxx / yyyy</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source (wild or cultivated)  Year of harvest  Lot identification number

Repacked caviar label (same product):

<table>
<thead>
<tr>
<th>Repacking plant identification number with country ID code</th>
</tr>
</thead>
<tbody>
<tr>
<td>HUS / C / CN / 2018 / FR-xxxxx / yyyy</td>
</tr>
</tbody>
</table>

Year of repacking  Lot identification number (or export or re-export certificate number)
Caviar labelling, the FEAP issue

Results:

- No more information about the year of production and the plant of origin (only the country)
- European consumers don’t know what they buy!

But, CMO (EU 1379/2013) in its precepts clearly states:

“In order to enable consumers to make informed choices, it is necessary for them to be provided with clear and comprehensive information on, inter alia, the origin and the method of production of the products”
Caviar labelling, the FEAP issue

CMO, what does it exactly say?

Art. 35 (mandatory information):

(a) the commercial designation of the species and its scientific name;

(b) the production method, in particular by the following words "... caught ..." or "... caught in freshwater ..." or "... farmed ...";

(c) the area where the product was caught or farmed, and the category of fishing gear used in capture of fisheries

In application for products listed in Annex 1 (a, b, c e) BUT not for products listed in Annex 1 (h):

Prepared or preserved fish; caviar and caviar substitutes prepared from fish eggs"
What is exactly caviar?

- According to CMO Annex 1: Prepared or preserved fish

So, it means that it has been processed:

‘processing’ means any action that **substantially alters** the initial product, including heating, smoking, curing, maturing, drying, marinating, extraction, extrusion or a combination of those processes (852/2004)

Is it the case? Absolutely not!

- According to us: pre-packaged, salted aquaculture product

And so fall under Annex I (b) *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*
Caviar labelling, the FEAP issue

What does it imply?

- Caviar should follow art. 35 and label should clearly state the origin of the product!
- FEAP also ask for the 2 dates (production and repacking) clearly appear on the cans.

To be clear FEAP:

- doesn’t want to stop extra-EU imports
- doesn’t say imported caviar is of lower quality
- wants European repackers stop making believe that what they sell comes from Europe
Caviar labelling, the FEAP issue

Where are they now?

- AAC (Aquaculture Advisory Council)

  

  ✔

- MAC (Market Advisory Council)

  Still under discussion, next meeting on May 17 (vote?)

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EUMOFA Report, The Caviar Market

First World Caviar Forum – May 7, 2019 - Brussels
EUMOFA Report, The Caviar Market

EUMOFA:
- European Market Observatory for Fisheries and Aquaculture
- Market intelligence tool on the EU fisheries and aquaculture sector
- Developed by the European Commission
- Enables direct monitoring of volumes, values and prices
- Data are collected from EU countries, Norway, Iceland and from EU institutions
- Aims:
  - increase market transparency and efficiency
  - analyses EU markets dynamics
  - supports business decisions and policy-making

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EUMOFA Report, The Caviar Market

The report:

- Asked by the FEAP (through the MAC) in May 2018
- MAC approved it
- FEAP Sturgeon Commission members review in September 2018
- Released in November 2018
- FEAP will ask the report be updated every year!

https://www.eumofa.eu/documents/20178/84590/The+caviar+market_EU.pdf/ed029e5e-e9a7-43c0-aab0-059107226d2e
Intra-EU caviar exports in 2017 (>1,000 kg)

Source: Eurostat / EUMOFA

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EU caviar imports in 2017 (>1,000 kg)

Source: Eurostat / EUMOFA
EUMOFA Report, The Caviar Market

EU caviar imports, countries exporting to the EU

Source: CITES Database

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EU caviar imports, countries importing in the EU

Source: CITES Database

First World Caviar Forum – May 7, 2019 - Brussels
EU caviar imports, imported species

Source: CITES Database
EUMOFA Report, The Caviar Market

EU caviar exports in 2017 (>1,000 kg)

Source: Eurostat / EUMOFA

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EU caviar exports, exporting countries

Source: CITES Database

First World Caviar Forum – May 7, 2019 - Brussels
EU caviar exports, export markets

Source: CITES Database

First World Caviar Forum – May 7, 2019 - Brussels
EUMOFA Report, The Caviar Market

EU caviar exports, exported species

Source: CITES Database
China’s production and market
China’s production and market

Production (2017) : 100 metric tons (30% of the global production)

Production (2020, est.) : 150-200 tons (up to 40% of the global production)
China’s production and market

Changes in China:

- **Clean-up program:**
  
  Clearing fish farms from lakes and reservoirs
  
  2018: 300,000 aquaculture cages removed (160,000 ha)
  
  Will continue in 2019

- **Fishing ban from March 1 to June 30,** will cover the main streams, tributaries and lakes along major rivers including the Yangtze and Pearl rivers. So less fishing, more (land) aquaculture to reach the same production.

- **Consumption shift!**

  China Sturgeon Association predict 100 tons/year only in China by 2020

  ➡️ could absorb a substantial part of Chinese production

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China’s production and market

Focus on world’s largest producer: Kaluga Queen

6 products: Kaluga, Beluga, Siberian, Russian, Amour and hybrid (♂ Acipenser schrenkiid x ♀ Huso dauricus)

Supplier of: Petrossian, Kaviari, Imperial Caviar and much more!

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Any other business
References and useful readings

Bronzi et al 2019, Sturgeon meat and caviar production: Global update 2017

Wang et al 2017, Paradigm changes in freshwater aquaculture practices in China: Moving towards achieving environmental integrity and sustainability

Traffic 2019, Corruption and wildlife crime, a focus on caviar trade

Traffic 2009, Universal caviar labelling requirements

A surge in sturgeon
https://thefishsite.com/articles/a-surge-in-sturgeon

Caviar producer has a 'China Dream'
https://www.chinadailyhk.com/articles/118/120/247/1523496944303.html
References and useful readings

China's sturgeon producers create caviar dreams

Sturgeon farming on a bigger scale

Costs mounting from China's aquaculture clean-up program
https://www.seafoodsource.com/features/costs-mounting-from-china-s-aquaculture-clean-up-program

China Focus: Fishing ban started in China
http://www.xinhuanet.com/english/2019-03/01/c_137861381.htm

Trump’s tariffs on Chinese caviar may stop a quiet takeover of the world’s gourmet kitchens

The World Is Eating Chinese Caviar (And Doesn't Know It)

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Thank you for your attention