USDA Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Template Version 2.09

Voluntary Report - Public distribution

Date: 7/31/2008

GAIN Report Number: AR8032

Argentina

Fishery Products

Fish and Fishery Products

2008

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Report Highlights:
Argentina is an important supplier of fish and fishery products to the world market. In 2007, exports totaled 540,000 MT and were valued at $1.1 billion. Exports in 2008 are expected to remain stable. Fish domestic consumption is limited, primarily due to Argentines' preference for beef and other meats, and relatively high domestic fish prices. Fish and fishery product imports in 2007 were negligible compared to exports, accounting for 42,000 MT and valued at $95 million.

Includes PSD Changes: No
Includes Trade Matrix: No
Trade Report
Buenos Aires [AR1]
[AR]

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Fishery Industry Overview

The Argentine fishery industry enjoys many favorable natural characteristics. Argentina's extensive coastline stretches over the Southeastern Atlantic Ocean creating an Exclusive Economic Zone (EEZ) of 1.164 million square kilometers that is optimal for ocean catch. In Argentina, there are a number of valuable species for the global fishery market. The most common species include: Argentine Hake/Whiting (Merluccius hubbsi), Shortfin Squid (Illex argentinus), Patagonian Grenadier (Macroronus magellanicus), Argentine Red Shrimp (Pleoticus muelleri), Argentine Anchova (Engraulis anchoita), Skate (Raja cyclophora), White Croaker (Micropogonias furnieri), and Kingclip (Genypterus blacodes). Other significant species are: Pollock, Red Snapper, Argentine Sea Bass, and Flounder.

These natural characteristics present great opportunities for increased development in the industry. However, additional technological investment is needed for the processing of different species. At present, domestic producers prefer the relatively low-risk of exporting fish as a commodity due to a lack of required investment. Around 95 percent of the total fishery production is exported. Of the total catch, approximately 40 percent is cut into fillets. The domestic market is very limited due to Argentines' cultural preferences, the relatively low price of beef, lack of government policies fostering fish consumption, and a high fish retail price primarily due to high distributions costs. All of these factors contribute to the prevailing view within the industry that fish are best marketed as an exportable commodity.

Production

In 2007, Argentina's total fishery production was approximately 570,000 MT (including fish flour, powder, and pellets, not apt for human consumption - HTS code #2301.20).

The table below illustrates wild ocean catch for 2006-2007, and how the catch of the various species varied during that period:

Wild Catch Production 2006-2007 (MT)

	2006	2007	Difference 06/07 (%)
Fish			
Whiting	348,392	295,532	-15.2
Patagonian Hoki	119,642	94,919	-20.7
Argentine Anchovy	30,957	27,862	-10.0
Skate	21,138	27,558	30.4
Croaker	15,604	25,391	62.7
Kingclip	19,473	20,374	4.6
Southern Blue Whiting	29,866	17,758	-40.5
Sea Trout	12,946	15,266	17.9
Other	82,556	90,353	9.4
Subtotal	680,574	615,013	-9.6
Crustaceans			
Shrimp	42,701	46,300	8.4
Other	1,325	775	-41.5
Subtotal	44,026	47,075	6.9

Mollusks			
Squid	291,934	233,001	-20.2
Scallop	10,838	7,419	-31.6
Other	569	518	-9.0
Subtotal	303,341	240,938	-20.6
TOTAL	**1,027,941**	**903,025**	**-12.2**

Source: FAS Buenos Aires based on table from Revista Redes de la Industria Pesquera Argentina

Aquaculture

Aquaculture is a relatively new facet within the fishery industry, becoming a commercial activity during the 1990s. While it has been growing steadily, about 17.5 percent during the past 2-3 years, farmed production remains at less than 1 percent of the total fishery production, with roughly 95 percent of the market ocean caught, and river caught species accounting for about 4 percent. Ten years ago, 950 MT of farmed species were produced; in 2007, production reached 2,300 MT. Currently, this activity is primarily intended for internal consumption, except for trout production, of which almost 100 percent is exported to the U.S. However, its expansion is due to stronger demand from international markets, primarily, the U.S. and EU.

There is a relatively new trend in aquaculture production which has been expanding rapidly, referred to as *agri-aquaculture*: a group of small agricultural producers, who have traditionally grown field crops, such as soybeans, are devoting some land to the aquaculture activity in response to higher export taxes on grains.

The growth potential of aquaculture is significant due to Argentina's great productive and geographic diversity, but it faces strong competition from ocean caught fish. In addition, it is hard for farmers to obtain inputs, such as feed and technical equipment, which have to be imported primarily from Chile, Brazil, the U.S., and the E.U., increasing costs. This significantly affects farmers as most of them are small players in the market.

The Secretariat of Agriculture, Livestock, Fisheries, and Food (SAGPyA, in Spanish) established an export quota of 12,000 MT (live weight) for aquaculture production, which can be occasionally increased up to a total of 15,000 MT.

Of a total of 14 species, the most important cultivated species is the Rainbow Trout, accounting for approximately 68 percent of the total. Exports of Rainbow Trout in 2007 accounted for 407 MT and totaled $2.6 million. Other cultivated species in 2007 were: *Pacu* (large river fish): 19 percent, Carp: 4 percent, *Yacare* (similar to a small alligator): 2 percent, Mussel: 1.2 percent, Bull frog: 0.50 percent, among others.

Fishing Fleet

All fishing vessels must have Argentine flag to be allowed to sail inside the EEZ. In Argentina, there are 652 vessels registered to fish Argentine waters with a national fishery permit, and 400 smaller ships which operate along the coastline of the provinces.

Fleet composition

- Approximately 450 vessels which process and freeze fish on board
- 92 squid vessels which catch squid
- 80 shrimp vessels which catch, process, and freeze shrimp on board
- 40 factory or freezer vessels with freezing plants approved by SENASA
- 3 surimi vessels which primarily produce fish flour and manufacture surimi paste
- The balance is composed of smaller ships.

Trade

Fishery Industry Trade Balance (2002-2007)
(thousand MT)

Year	Imports	Exports	Imports as a percentage
2002	8.4	471.6	2%
2003	17.5	485.6	3%
2004	28.1	492.3	5%
2005	33.6	496.8	6%
2006	35.2	639.9	5%
2007	41.8	538.8	7%

Source: Revista Redes de la Industria Pesquera Argentina

Exports

Argentina is an important supplier of fish and fishery products to the world market. In 2007, approximately 95 percent of the total fishery production was destined for export. According to SAGPyA, in 2007, the country exported a total of roughly 540,000 MT of fishery products, including mollusks, crustaceans, and fish flour (about 87,000 MT less than the previous year) valued at approximately $1.1 billion. Whiting exports in 2008 are expected to remain stable. Squid and Shrimp exports are estimated to increase due to high catch volumes and relatively high international prices.

Fishery Exports 2007 (thousand MT)

Species	MT	Thousand $	Market Share	Accrued Market Share
Whiting	138.8	326.9	29.3%	29.3%
Shrimp	45.2	291.9	26.2%	55.5%
Argentine Squid	149.4	115.3	10.3%	65.8%
Scallop	8.4	50.9	4.6%	70.4%
Patagonian Hoki	28.3	50.5	4.5%	74.9%
Pink Cuskeel	9.4	40.7	3.6%	78.6%
White Croaker	30.8	25.4	2.3%	80.9%
Skates	11.1	23.3	2.1%	83.0%

Argentine Anchovy	12.4	22.1	2.0%	84.9%
Weakfish	10.5	17.9	1.6%	86.5%
All other species	100.3	150.0	13.5%	13.5%

Source: Secretariat of Agriculture, Livestock, Fisheries, and Food (SAGPyA, in Spanish)

In 2007, Argentina exported fish and fishery products to over 110 countries. Among the main export destinations in 2007, Spain, China, and Brazil accounted for roughly 46 percent (in volume) of total fishery exports. Value-wise, the primary export markets were Spain, Italy, and Brazil, which accounted for 53 percent of total fishery exports. Other important export markets were the United States (U.S.), France, Japan, the Russian Federation, and Germany. The U.S. market share in 2007 was 4.5 percent in volume and 7 percent in value.

The following five species accounted for approximately 75 percent of total exports: Whiting (29 percent), Shrimp (26 percent), Squid (10 percent), Scallop (5 percent), and Patagonian Hoki (5 percent). Other species exported were Scallop, Patagonian Hoki, Southern Blue Whiting, Croaker, Skate, and Argentine Anchovy. Most fish exported is fresh and/or frozen. Exports of processed fishery products include: breaded fish sticks, fish hamburgers, fish fillets, Individually Quick Frozen (IQF) fish, etc. Some firms produce fishery products for private labels.

During 2007, a total of 138.8 thousand MT of Whiting was caught for export, which accounts for nearly one-third of all ocean catch destined for export and is a major source of revenue for the port cities of Mar de Plata, Puerto Madryn, and Puerto Deseado, the three leading ports within the Argentine fishery industry. Other ports are: San Antonio Este and San Antonio Oeste, in the Province of Rio Negro; Rawson, Camarones, and Comodoro Rivadavia, in the Province of Chubut; Caleta Paula, San Julian, and Punta Quilla, in the Province of Santa Cruz; and Ushuaia, in the Province of Tierra del Fuego. Whiting, as the primary resource for the fishery industry, is essential for these regional economies as well as the fishery industry at large. Combined, the two major ports in the Patagonian region (Puerto Madryn and Puerto Deseado) accounted for roughly 40 percent of all Whiting exported in 2007.

China is the second largest export market by volume for the Argentine fishery industry. However, the value of exports to China per MT is less than 15 percent of the value of exports to Spain, primarily due to the fact that they import Squid (whole). When value and volume are taken into consideration, among the primary export destinations, France is the country where fish products are exported at the highest price per MT. During 2007, the average price of fishery products exported to France reached roughly US$3,687 dollars per MT, 40 percent higher than the average price of Spain, and 12 percent higher than Italy, the market with the second best value per MT.

Fishery Exports by Country (2007)

Country	Thousand MT	Million $	Market Share (%)	% Change 2006/2007
Spain	133.7	350.1	31.7	-5%
Italy	35.9	118.18	10.7	1%
Brazil	48.9	116.8	10.6	3%
United States	24.4	76.9	6.9	1%
France	15.0	55.3	5.0	-2%
China	64.8	47.4	4.2	-0.2%
Japan	23.8	42.1	3.8	-2%
Russia	19.6	30.1	2.7	1%
Germany	10.3	25.5	2.3	-0.1%
South Korea	14.3	22.9	2.0	1%

Source: FAS Buenos Aires, based on table from report by Under Secretariat of Fisheries and Aquaculture

Illustrative Export Prices of Fishery Products

Species	Description	February 2008 $/MT
Whiting	H&G (500-800 g)	1,800-2,000
	H&G (800-1,200 g)	1,950-2,200
	H&G (1,200-1,500 g)	2,350-2,500
	Fillets (100-200 g), interleaved, with a few spines, skinless	2,500-3,400
Argentine Anchovy	In barrels, in brine H&G	1,600-3,300
Patagonian Hoki	Fillets, without spines, without parasites	1,630-2,600
Shrimp	L1	7,000-8,500
	L2	6,000-7,500
	C1, headless	8,000-10,000
	C2, headless	7,500-8,500
Squid	Whole	600-830
	Sheath	900-1,500
	Tube	1,400-2,200
White Croaker	Whole, frozen (300-500 g)	650-850

Source: Report by the Under Secretariat of Fisheries and Aquaculture – February 2008

Imports

While Argentine imports of fishery products are negligible compared to exports, they have been increasing steadily since 2002. According to industry sources, in 2007, Argentine imports of fishery products were over 42,000 MT with a total value of $95 million, compared to $14.4 million in 2002. Imports in 2007 increased significantly both in volume (19 percent) and value (24 percent). Salmon was the fish most imported, and octopus was the main mollusk imported. Processed fish products accounted for most imports: canned tuna fish as well as prepared or preserved crustaceans and mollusks had a significant market share. In addition, other imported products were: fish flour, canned sardines, and other fish preparations, among others. The table below illustrates Argentine fishery imports by country:

Fishery Imports by Country (2007)

Country	Thousand MT	Million $	Market Share (%)	% Change 2006/2007
Chile	12.5	28.7	30.2	-8%
Ecuador	8.2	21.7	22.8	-1%

Brazil	6.4	17.8	18.7	7%
Thailand	8.2	14.1	14.9	3%
Singapore	2.3	3.9	4.1	-4%
Spain	1.2	2.8	3.0	1%
Peru	1.2	1.3	1.4	0%
Malaysia	.7	1.3	1.4	1%
Uruguay	.4	1.1	1.2	0%
Germany	.1	.8	0.9	1%

Source: FAS Buenos Aires, based on report by Under Secretariat of Fisheries and Aquaculture

According to industry sources, canned and processed products account for approximately 74 percent of all imported products. During 2007, about $20.2 million of canned or processed tuna fish was imported mainly from Brazil, Ecuador, and Thailand. The main countries of origin for all fishery products were Chile, Ecuador, and Brazil. The U.S. market share is about 0,06 percent. Imports of Chilean fresh or frozen salmon accounted for $11.7 million. Stripe-bellied bonito tuna fish from Brazil were also imported for a total of $1.8 million during 2007.

Domestic Market

Argentines' cultural preferences strongly favor consumption of beef (65 kg per capita/year) and, to a lesser extent, poultry (30 kg per capita/year). Traditionally, the price of beef has been very inexpensive compared to fish. In addition, many Argentines lack an understanding of how to prepare fish. The majority of fish consumed domestically is frozen and purchased through retail outlets such as supermarkets, with fresh fish available at larger retail chains only in major cities. Government and industry contacts indicate that per capita consumption of fish products is around 6–7 kg/year (compared to about 18 kg per capita/year in the wealthier neighborhoods of Buenos Aires City and the northern suburbs). Neither the government nor the private companies have designed promotional campaigns to increase fish consumption. The most popular species (both fresh and frozen) for Argentine consumers is Whiting. Other popular species are the Argentine Shortfin Squid, Red Shrimp, and Salmon. Along the shores of the Parana and Uruguay rivers, consumption of river fish species, such as *Dorado* and *Surubi* (large fresh-water catfish), is significant.

Distribution Channels

Domestic fishing vessels embark from the three main ports of significance for the fishing industry: Mar de Plata, Puerto Madryn, and Puerto Deseado. Mar del Plata, located along the southeastern coast of Buenos Aires Province, is the main supplier of fresh and frozen fish and fish products to the major urban areas of the country. Roughly 55 percent of all fish caught flows through Mar de Plata. In recent years, Puerto Madryn and Puerto Deseado have increased their market share. These ports, located in the Patagonian region, have become important markets for Shrimp and Squid, which are mostly exported. The small volumes of these products which are destined for the domestic market are mainly distributed to supermarket and major retail stores such as Coto, Carrefour (with its own processing plant in Mar del Plata), Jumbo, and Wal-Mart Supercenters. They are also marketed at the Buenos Aires Central Market and fishery specialty stores. In the case of fresh fish, independent fishermen, processing companies, and firms associated with both, fish catch and its distribution, participate in the processing of this product and its distribution.

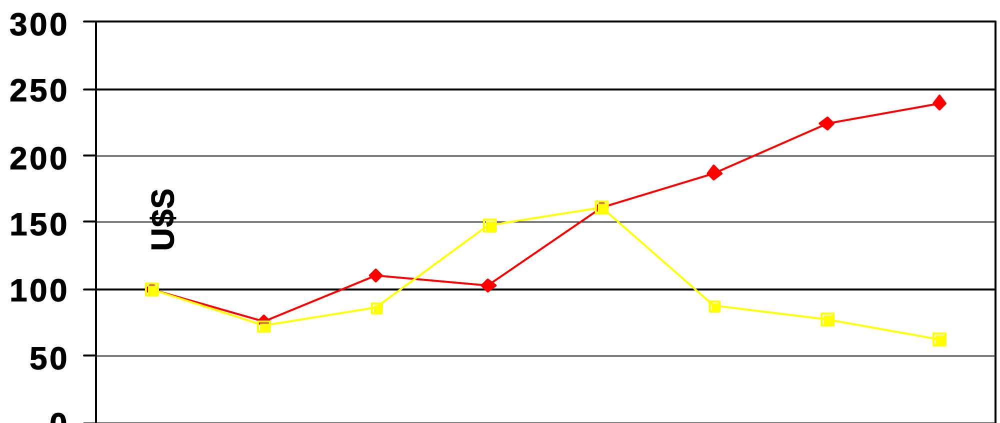
Because of the long distance from port to consumer, industry contacts estimate that transportation expenses account for roughly 35 percent of the overall cost of production for fish: the price of fish triples between the processing facility and retail destination mainly because of the necessity to maintain cold storage capacity throughout the supply chain.

Overview of Two of the Major Fishery Products in Argentina: Argentine Red Shrimp and Shortfin Squid

According to a report published by the UnderSecretariat of Fisheries and Aquaculture in August 2007 (Pesquerias de Calamar y Langostino – Situacion Actual), both species, the Argentine Red Shrimp and the Shortfin Squid, are currently undergoing a very serious situation, primarily due to lower international prices and the increase of production costs. The report stated that, if no measures are taken immediately, many companies could go bankrupt, with the expected consequence of unemployment and social conflicts.

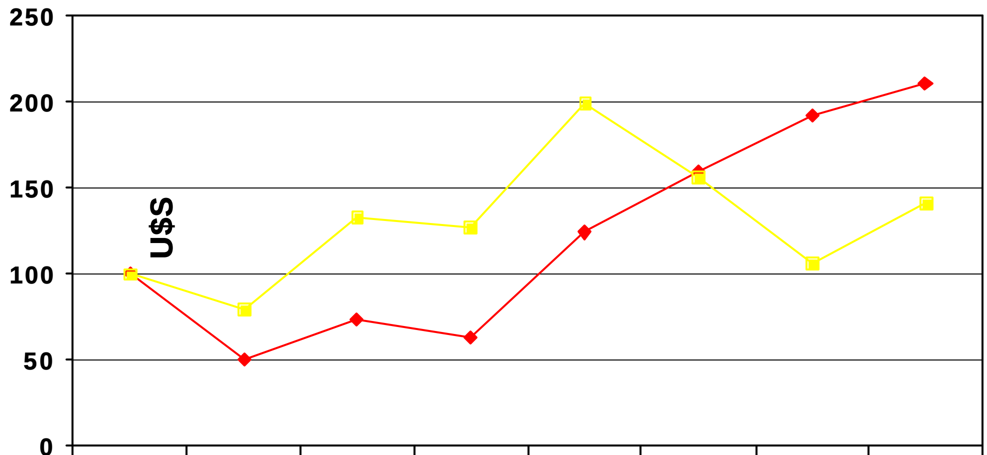
The two charts below, from by CAPeCA (Camara de de Armadores Pesqueros y Congeladores de la Argentina, illustrate the difference between prices and production costs of Shrimp and Squid:

Evolution of Squid Costs & Prices (baseline 2001=100)



	2001	2002	2003	2004	2005	2006	2007	2008
Cost	100	76	110	102	161	187	224	240
Price	100	72	86	148	161	87	77	63

Evolution of Shrimp Costs & Prices (base 2001=100)



	2001	2002	2003	2004	2005	2006	2007	2008
Cost	100	50	73	63	124	160	192	210
Price	100	80	133	127	199	156	106	141

Consumer Profile

There are two main reasons why Argentine consumers eat small quantities of fish and seafood: they prefer beef, and fish products are expensive compared to meats. There is a small portion of the population, estimated at approximately 5-7 percent, which eats fish products on a regular basis. These consumers have a higher purchasing power, are concerned about their health and physical condition, and have healthy eating habits. Consumption of river fish species is significant along the northern coastline of Buenos Aires province, and Provinces of Santa Fe, Corrientes, Entre Rios, Formosa, and Misiones.

Market Opportunities

Due to a combination of strong cultural preferences that favor beef consumption, the high prices of fish and seafood compared to other meats, a lack of understanding among the population related to the health benefits of consuming fish as well as a lack of knowledge related to cooking fish, the majority of fish and fishery products in Argentina are destined for the export market.

However, there are a few, limited, opportunities for the export of U.S. fish products to the Argentine market. According to industry contacts, species that are expensive in the domestic market may represent an opportunity for U.S. producers, such as the Argentine Red Shrimp, which has been mainly exported to Europe for very high prices. As a result, this species is very expensive domestically. Argentina currently imports shrimp from Brazil and Ecuador at relatively lower prices. Another product with market potential in Argentina is the Pacific and Atlantic Salmon. While Chile is the main supplier of Salmon in Argentina, private industry contacts believe U.S. salmon can be competitive.

Investment

No public investment is being done in the fishery industry, except for some improvements in port facilities and access to ports. Limited private investment is being carried out in infrastructure development, especially by larger companies. However, local companies still prefer to export fish as a commodity, without any value added. In addition, further investment is held back due to the current economic instability. The largest investments in the fishery sector were carried out in the 1990's.

Fishery Industry Challenges

Although during the past few years the fishery activity and exports have been growing steadily, there have been investments in port facilities, and the hiring of intensive labor workforce increased, the industry still faces challenges that could impact future growth and investment, as follows:

- Higher production costs, which have neutralized the positive effects of the devaluation of early 2002.
- Labor costs, which increased about 33 percent a few years ago, and are currently over 55 percent, higher than in 2002.
- Limited government incentives: no rebates for Patagonian ports, implementation of export taxes, and loss of most tax rebates.

Product	Export tax (%)
Squid, whole, frozen	10
Shrimp, whole, frozen	10
Whiting, H&G (headed and gutted), frozen	10
Whiting, fillet, frozen	5

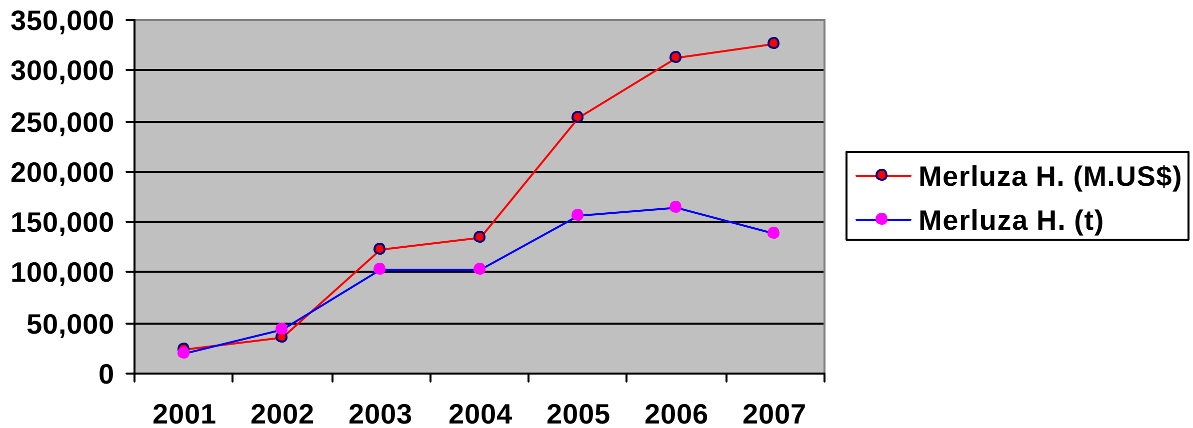
Source: Camara de Armadores Pesqueros y Congeladores de la Argentina (CAPeCA, in Spanish)

On July 15, 2008, through Resolution No. 137/08, the GOA implemented a program of export rebates – ranging from 1 to 10 percent - for 53 fishery products such as Whiting (Merluccius hubbsi) and Shortfin Squid (Illex argentinus), and also Rainbow Trout and Pacú, among the main farmed species. This is one of the official measures strongly demanded by the fishery sector, which will translate into $20 million to be returned to the industry on an annual basis, as reported by an article published by a local newspaper on July 14, 2008. However, private sources are not satisfied with this measure as they request that the GOA cancel export taxes to obtain the full benefit of the rebates. In addition, Resolution 137/08 does not include vessels which process and freeze fish on board, which is being requested by the fisheries sector.

- Lower Squid and Shrimp international prices (Squid: $650/MT in Feb-May 2008 compared to a record price of $1,842/MT in 2005. Shrimp: 8,600/MT in Apr-May 2008 compared to $12,137/MT in 2005).
- Fishing vessels are operating fewer days than they have traditionally done due to biological reasons (squid vessels: 70 days/year in 2007 compared to 200 days/year in 2001; shrimp vessels: 190 days/year in 2007 compared to 304 in 2001).
- Significant reduction of the Total Allowable Catch (TAC) for whiting to address overfishing (Secretariat of Agriculture, Livestock, Fisheries, and Food – SAGPyA, in Spanish, Resolution No. 065/2007). The TAC for whiting was reduced by 20 percent in 2008 and 11 percent in 2007. As a result, fish plants are operating at very high costs since they are keeping their total labor force although there is not enough biological resource for them to work on a daily basis.

Overfishing of important species continues to be one of the main problems facing the industry. The Office of the Judge Advocate General of the Nation (AGN) concluded a detailed audit that examined government efforts designed to combat overfishing. The audit was conducted from 2002-2006 and found that Whiting, one of the most significant species, will risk extinction if overfishing continues. Depletion of this species poses a particularly serious problem because of its value and importance to the industry. Private sources complain that tighter controls should be placed on the unloading of the fishery fleet. As the chart below illustrates, both the volume and value of the Whiting catch has increased sharply over the last seven years.

Exports of Whiting from 2001-2007
(MT and Million $)



Source: Secretariat of Agriculture, Livestock, Fisheries, and Food (SAGPyA, in Spanish)

To address overfishing, the Government of Argentina (GOA) has adopted legislation which includes fishing restrictions for most species, designed to make Whiting production sustainable; however, these efforts have been complicated by enforcement difficulties. The government also mandates that all fishing vessels use a device designed to selectively release younger fish to assist in preservation and sustainability. According to the audit mentioned above, most vessels do not use the device; nonetheless, the report gave high marks to efforts by the Naval and Port Police in combating illegal fishing in Argentine waters: seventeen vessels were seized between 2002-2006 recovering nearly $9 million in fines and catch. In addition, the GOA established an integrated system of satellite positioning, which requires vessels to inform their position every hour. According to government and industry contacts, increased regulatory oversight is being implemented to regulate fish species and sanitary issues. Moreover, the GOA is developing educational campaigns to educate fishermen on species protection and sustainability.

The industry also depends on species with short life cycles, such as the Argentine Shortfin Squid and the Argentine Red Shrimp; however, these species present challenges to the industry as their catch varies annually due to shorter life cycles and changes in the environment.

Finally, industry contacts and media reports have recently highlighted ongoing conflicts associated with fishing activities in areas near the Argentine oceanic border.
Argentina faces trade competition from Asian fleets (Philippine, Vietnamese, Indonesian, and Chinese), which fish unrestrictedly near the external edge of the Argentine oceanic border. Argentine companies claim that these fleets are using Argentine biological resources, without complying with security measures or labor laws, with lower operating costs and less government regulations. Private sources allege that these foreign competitors take advantage of the cost differential and undercut them in the export market.

Government Support Programs

Although there is no government financial program to support the fishery industry, the GOA does provide assistance for market access. They invite local firms to participate in trade missions, assist them to negotiate in foreign markets, and represent the industry at international fora to discuss bilateral and multilateral issues such as import tariff reductions. The GOA has also created a fund to provide training to fishermen on emergency operations, improvement of port access, equipment handling, etc. In the Province of Rio Negro, the GOA collaborates with education on fishery practices for students of marine biology.

Legislation

Conservation, protection and administration of the Argentine fishery sector are carried out under the overarching legislation authority of National Law No. 24.922 (issued in late 1997), which regulates maritime fisheries and established the jurisdictions for fishery activities: the jurisdiction of the provinces covers from the coastline up to the 12 maritime miles, and the Nation has exclusive jurisdiction over the Argentine EEZ and on the continental platform from the 12 maritime miles.

Decree No. 373/07 regulates continental fisheries, and Law No. 25.470 modified the range of penalties through the approval of an abbreviated proceeding for penalty implementation.

National Law No. 24.922 created the *Federal Fishery Council*, whose members are as follows:

- One representative of each province with a coastline;
- The Secretary of Fisheries;
- One representative of the Secretariat of Natural Resources and Sustainable Development;
- One representative of the Ministry of Foreign Relations, International Trade, and Worship; and
- Two representatives appointed by the Executive Branch.

The primary responsibilities of the Federal Fishery Council are the following:

- Establish a national fishery policy;
- Establish a fishery research policy;
- Establish the Total Allowable Catch by species, and the quotas for annual catch by vessel, species, fishery area, and type of fishing fleet (*);
- Approve fishery trade and experimental permits;
- Provide advice on international negotiations;
- Design the national fishery development plan; and
- Establish fishery catch fees.

(*) As part of the regulations that govern the attempts to address overfishing of Whiting, the GOA establishes an annual Total Allowable Catch (TAC) and assigns quotas for each fishing fleet. In order to perform any fishery activity, private companies must have two permits: one permit to access the fishing area and a fishing quota. The TAC for 2008 was established at 270,000 MT, compared to 340,000 MT in 2007, of which only 300,000 were caught due to a significant biomass decrease. The TAC for 2008 is not expected to be fulfilled. The GOA allows fleets to operate north and south of the 41st parallel (Patagonia region) from January 1st until they meet their quotas. The quotas distributed to each fleet are divided by quarter. Industry contacts estimate that fleets reach their quotas within 30 to 45 days during the season.

National Law No. 24.922 also established the creation of the Fishery Registry. All physical, and individual and legal entities which perform activities related to the commercial exploitation of live maritime resources must be registered in the Fishery Registry. In addition, a National Fishery Fund (FO.NA.PE., in Spanish) was created using the following main resources, among others:

- Annual fees from fishery permits;
- Fishery catch fees over catches by national flagged vessels;
- Fees received from the activity performed by foreign flagged vessels;
- Fines from violations to the present Law.

Sanitary Restrictions

The National Service of Agricultural and Food Quality and Safety (SENASA, in Spanish) is the government agency which regulates fish consumption, exports, imports, and federal transit.

SENASA Decree No. 4238/68 deals with government approval of fish processing plants (Chapter No. 2), and fish domestic consumption, trade, and transportation (Chapter No. 23). Imported fish is regulated by SENASA Resolution No. 816/02, Article 4.

There is local demand for Alaska salmon, which is not currently allowed entry into Argentina as SENASA requires that FDA document approval and inspection of the U.S. fish processing plant. On bivalve mollusks, scallops are the only species which is allowed entry from the U.S. SENASA validates and approves bivalve mollusks for export.

In the case of aquaculture production, to date, there has been no occurrence of diseases of mandatory declaration in Argentina, primarily due to the excellent quality of Argentine waters and sanitary status.

Most major fishery processing plants provide HACCP certification, and they apply traceability standards to their products. Some fishery products are also Kosher-certified, primarily for exportation to Israel.

Every plant approved by SENASA is assigned an official veterinarian who visits the plant every day to audit the processing facility. In addition, SENASA carries out inspections that may happen every 6 to 24 months, according to the plant history of non-conformities. Fish processing plants may also have audits from their customers.

Sources of Information/Useful Websites

Secretaria de Agricultura, Ganaderia, Pesca y Alimentos (SAGPyA)
Subsecretaria de Pesca y Acuicultura
Direccion de Economia Pesquera
www.sagpya.mecon.gov.ar/new/0-0/pesca/index_pesca.php
www.sagpya.gov.ar (Pesca y Acuicultura)

Consejo Federal Pesquero
www.cfp.gov.ar

Instituto Nacional de Investigacion y Desarrollo Pesquero
www.inidep.gov.ar

Camara de la Industria Pesquera Argentina (CAIPA)
www.caipa.org.ar

Camara de Armadores de Poteros Argentinos (CAPA)
www.capa.com.ar

Camara de de Armadores Pesqueros y Congeladores de la Argentina (CAPeCA)
www.capeca.org.ar

Fundacion Nuestro Mar
www.nuestromar.org

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www.cedepesca.org.ar

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