



The Nordic Flatfish project Workshop

Copenhagen 29 – 30 October 2019

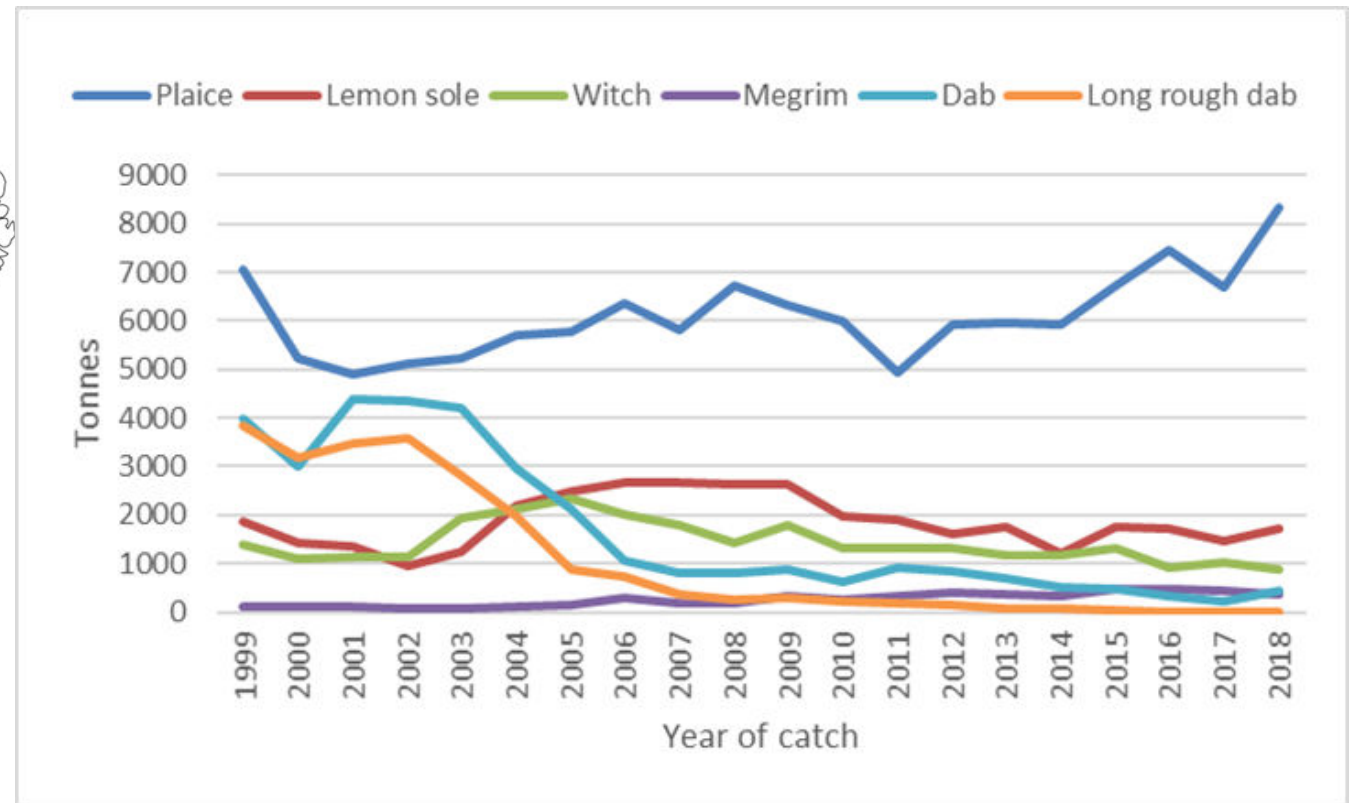
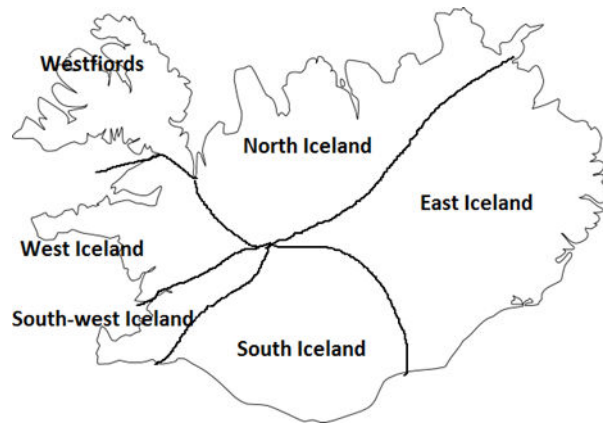


The Icelandic flatfish value chains
Gunnar Þórðarson (Matís)





Sources of raw material





Stock Status Plaice

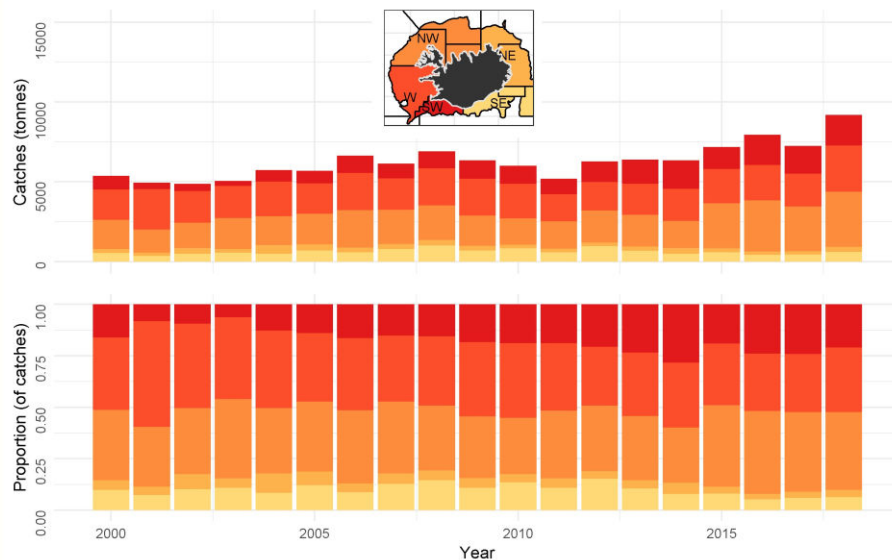
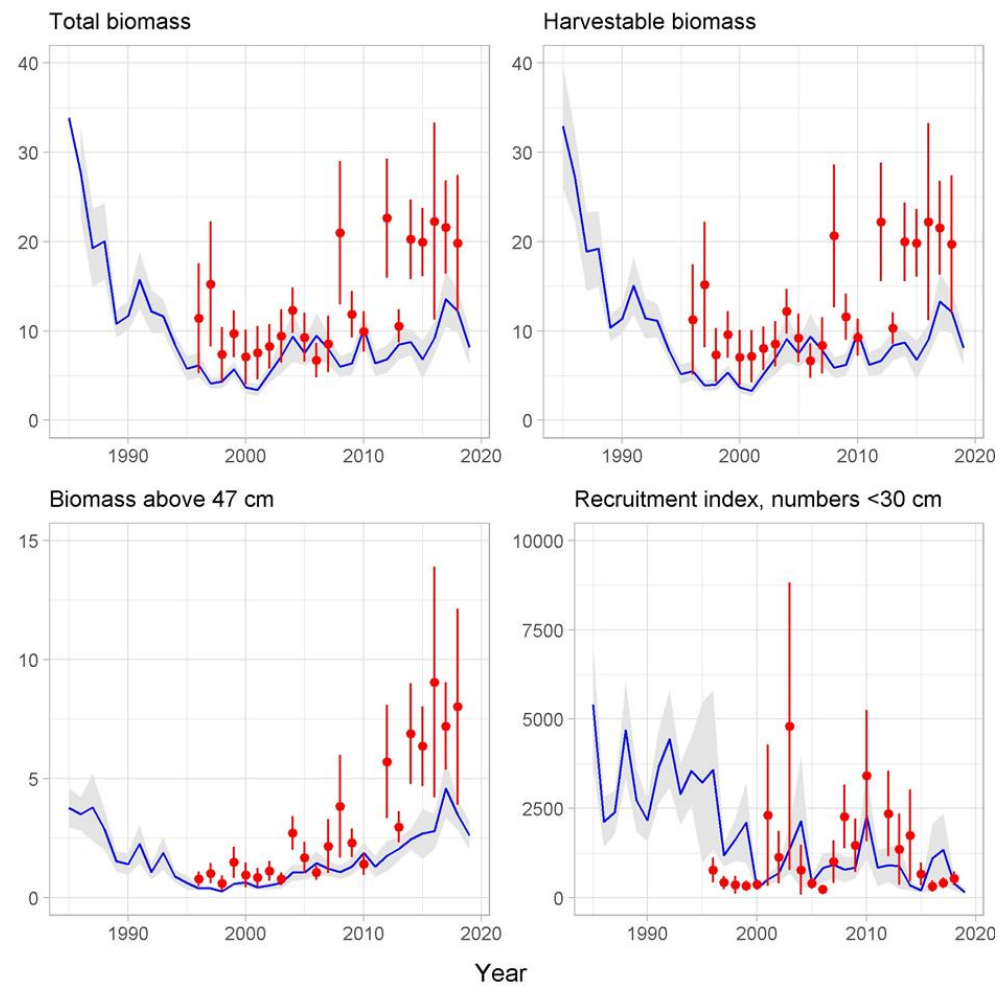


Figure 2. Plaice. Spatial distribution of the Icelandic fishery by fishing area from 2000 according to logbooks. All gears combined.

Mynd 2. Skarkoli. Útbreiðslæiða við Ísland frá árinu 2000 samkvæmt afladagbókum. Öll veiðarfæri samanlagt.





Stock Status

Lemon Sole

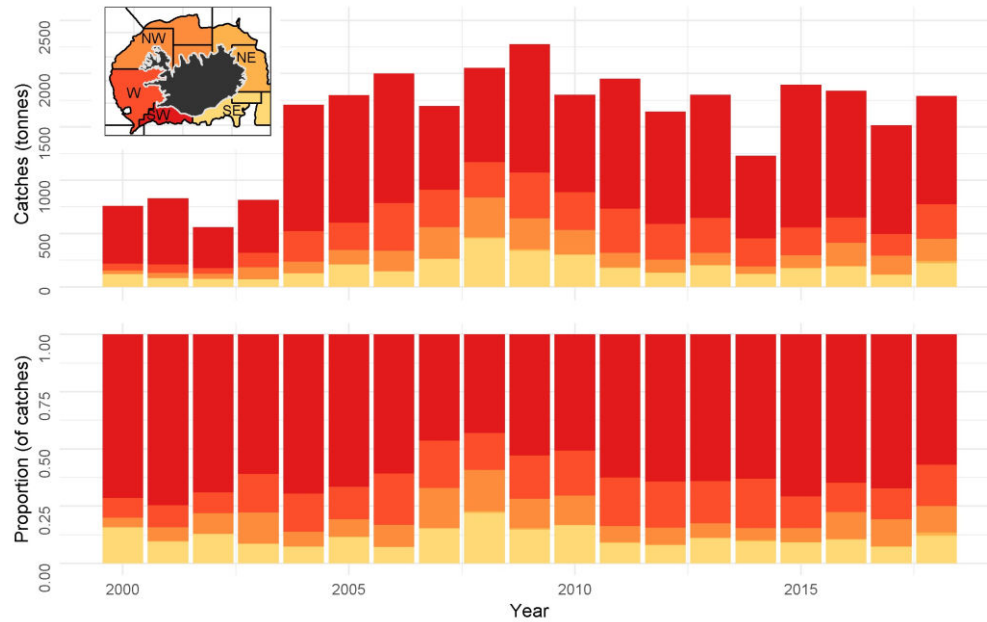
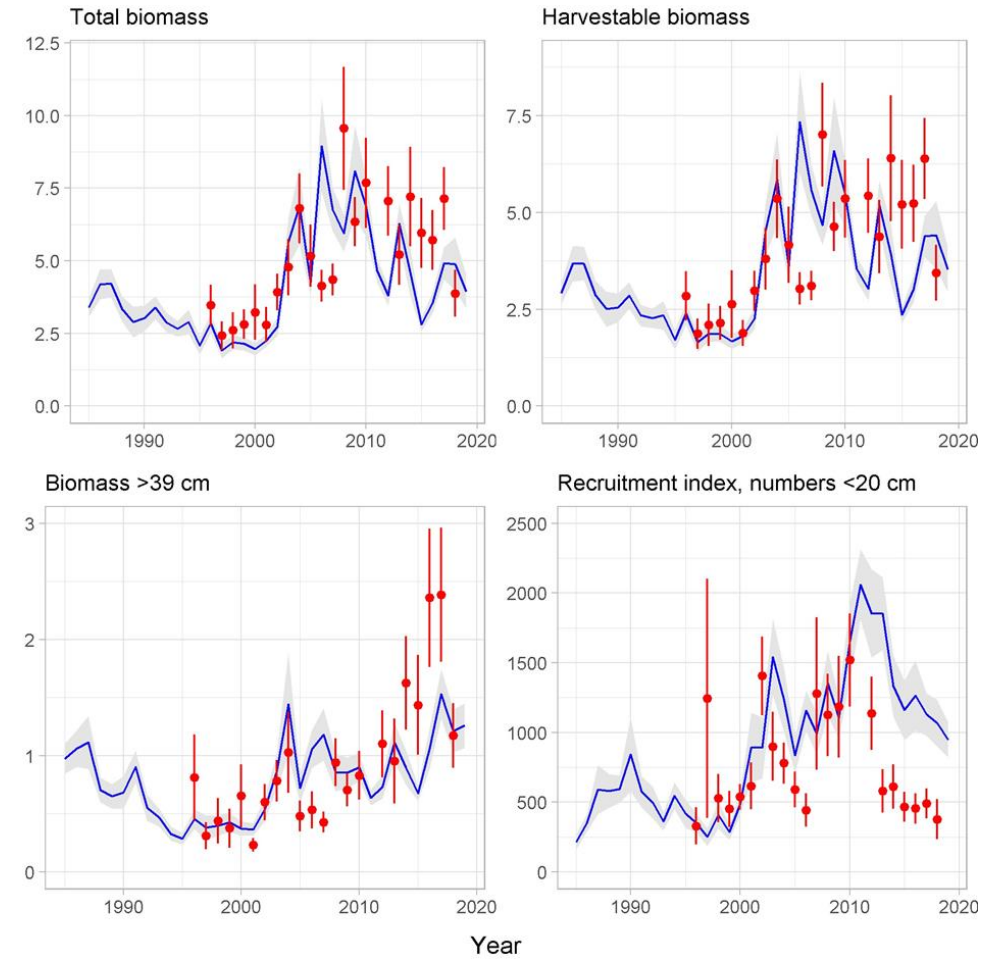


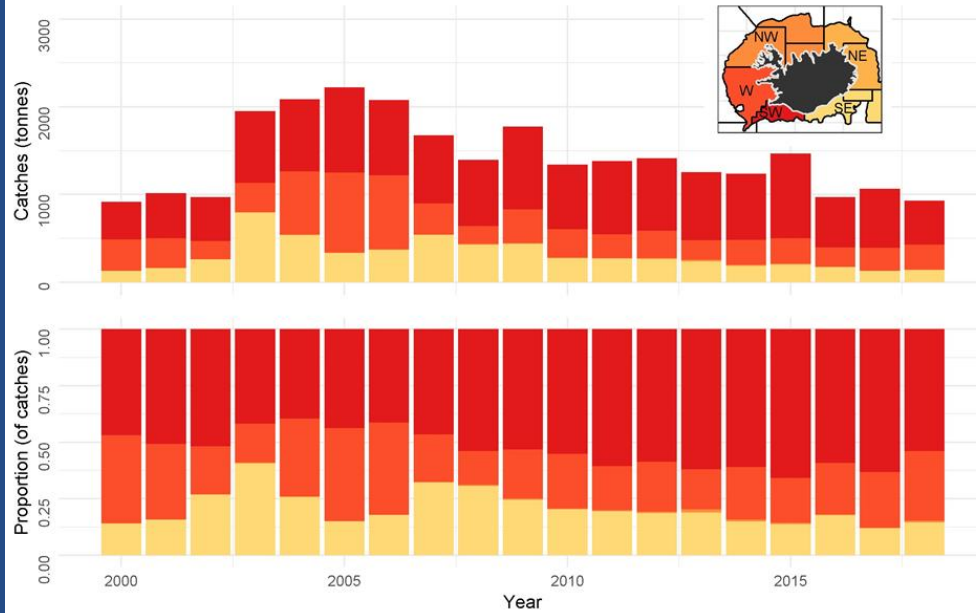
Figure 2. Lemon sole. Spatial distribution of the Icelandic fishery by fishing area since 2000 according to logbooks All gears combined.

Mynd 2. Þykkvalúra. Útbreiðsla veiða á íslensku veiðisvæðum árinu 2000 samkvæmt afladagbókum. Öll veiðarfæri samanlagt.

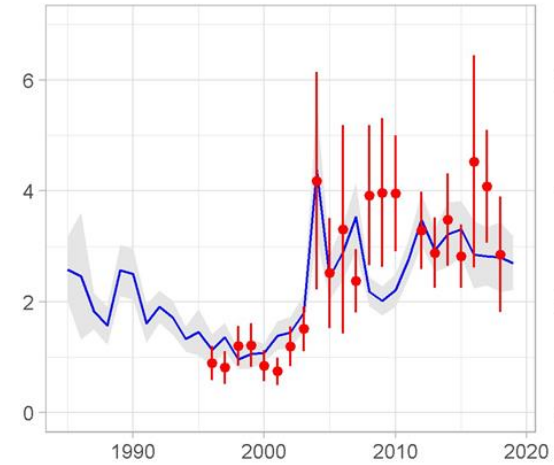




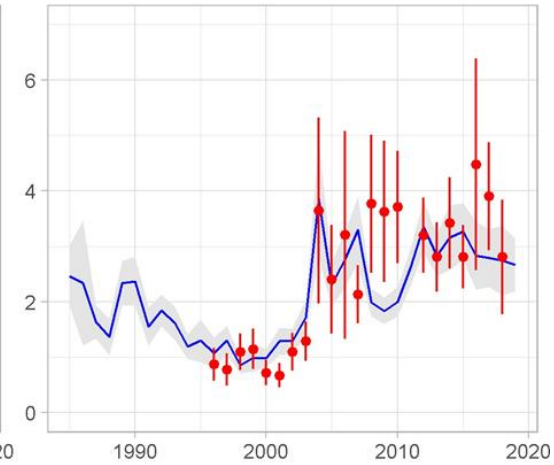
Stock Status Witch



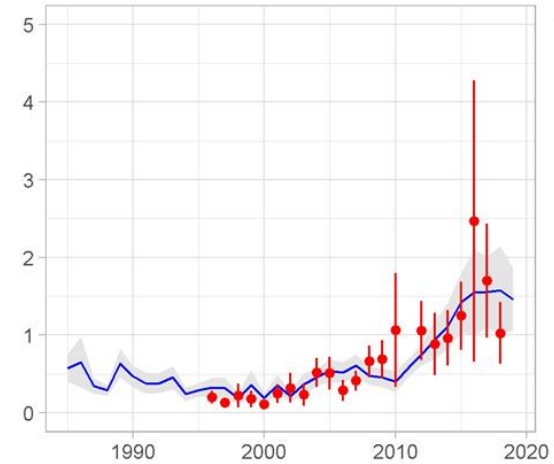
Total biomass



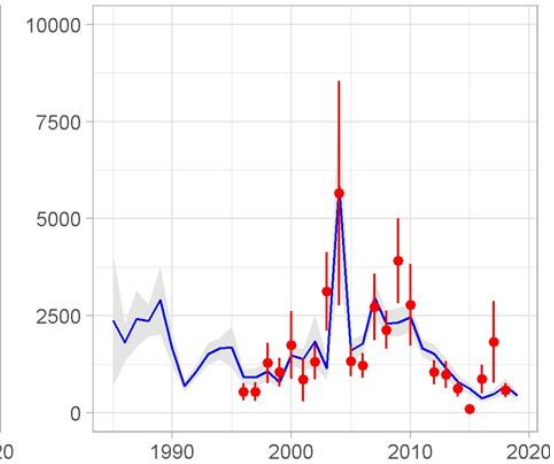
Harvestable biomass



Biomass >43 cm



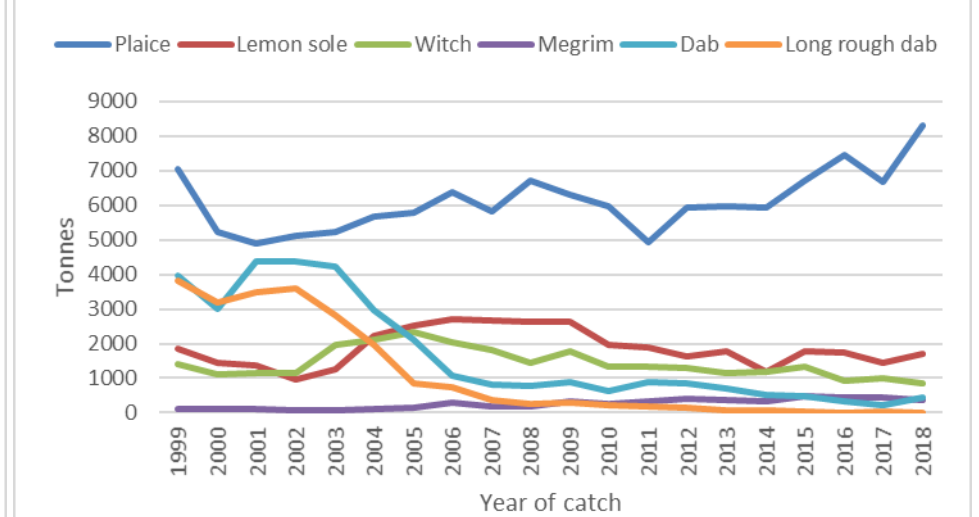
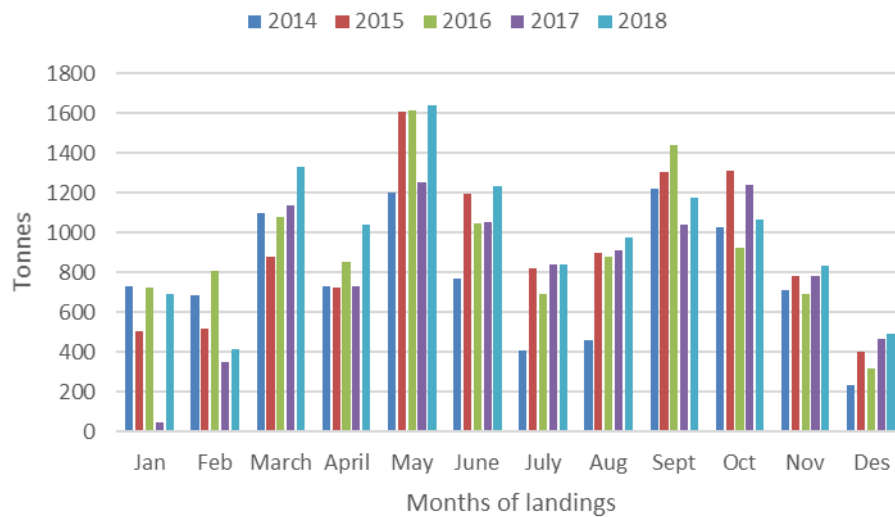
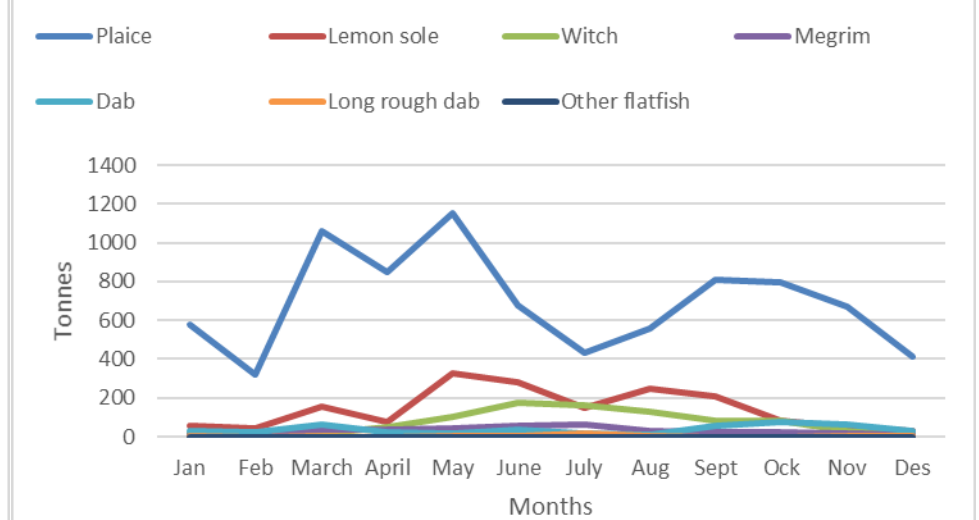
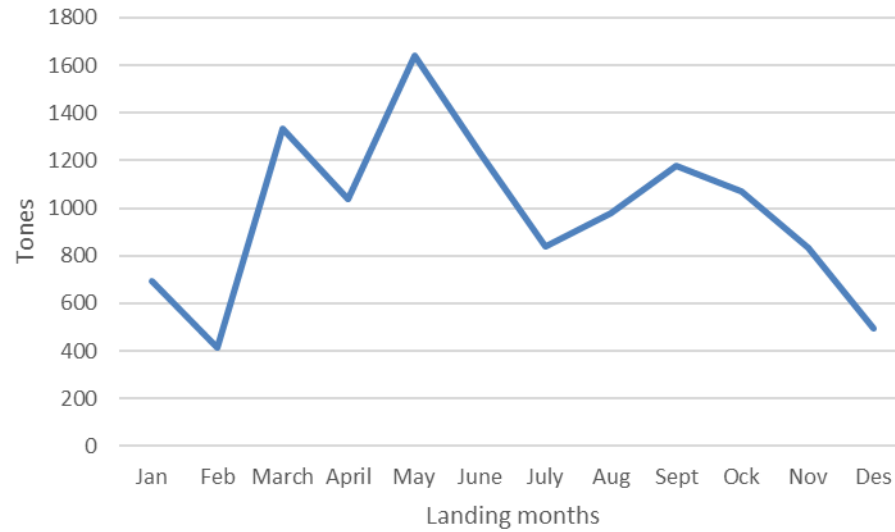
Recruitment index, numbers <30 cm



Year

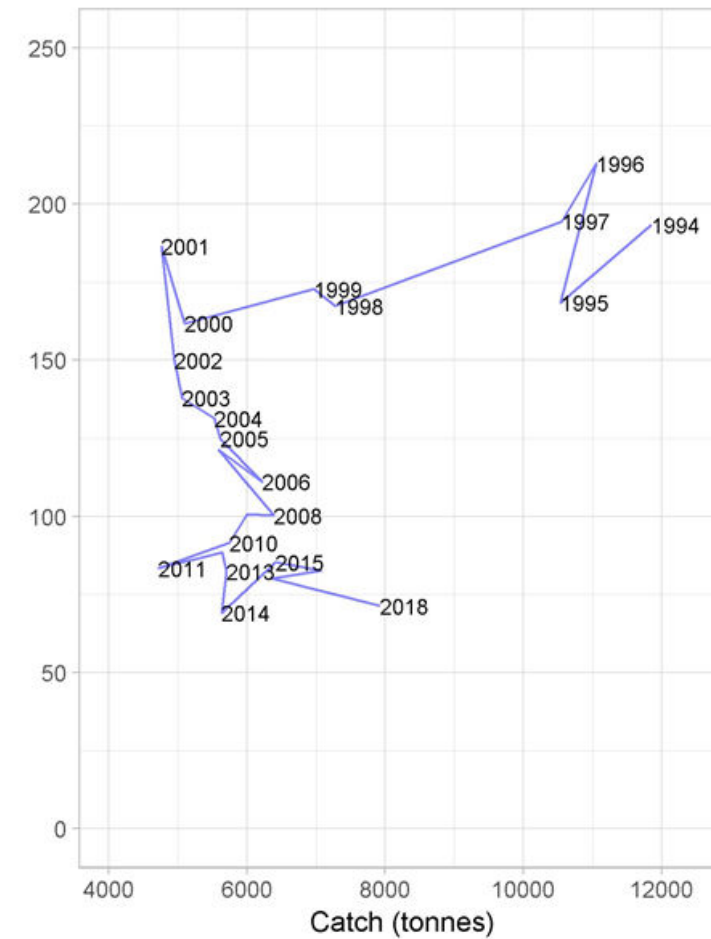
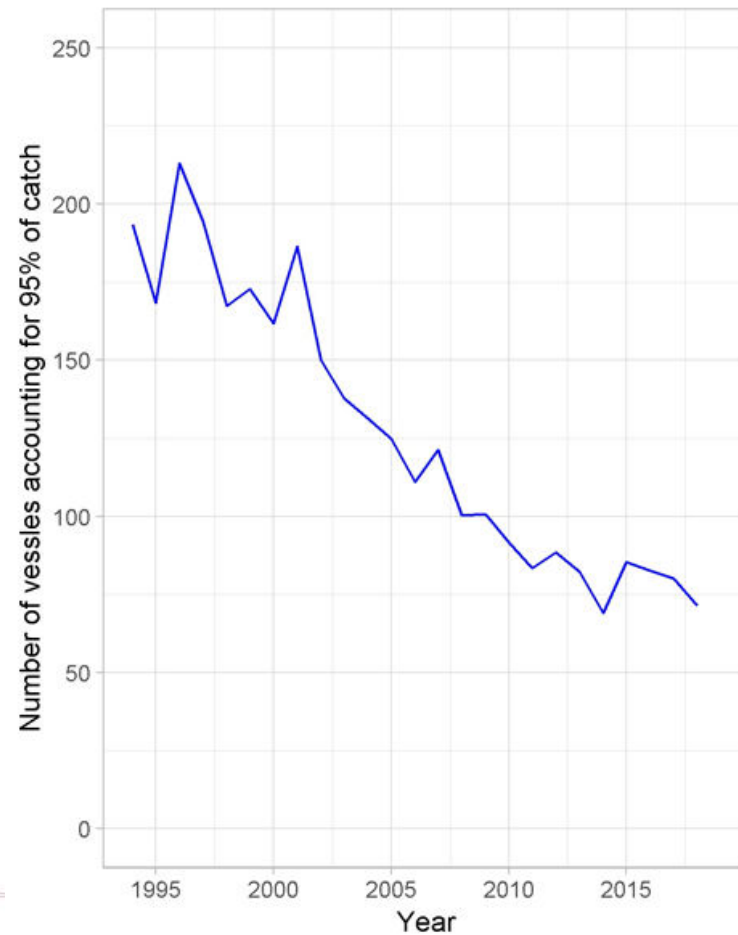


Fluctuations in supply



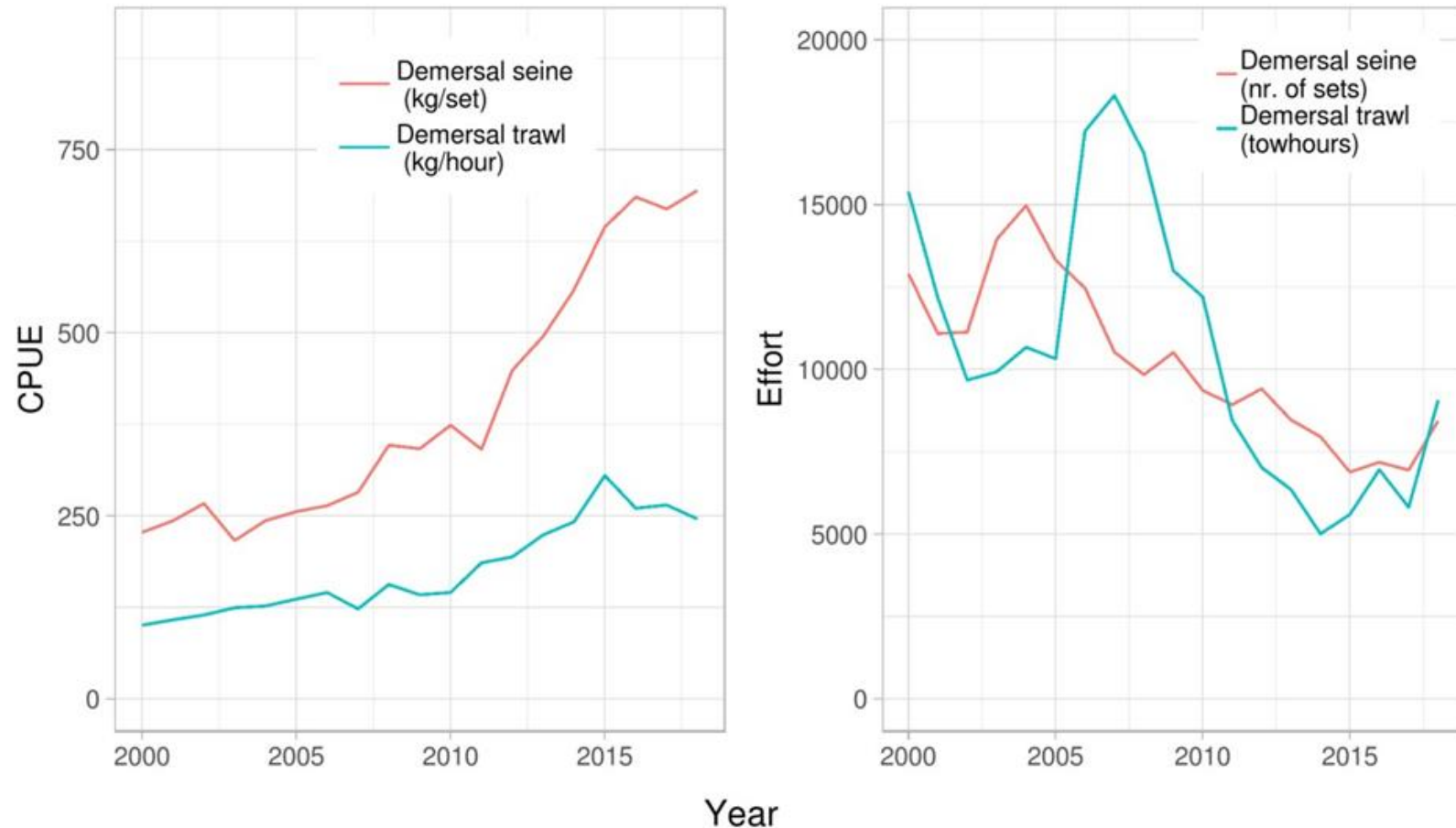


Geographical distribution of suppliers and size of suppliers / quotas - Plaice





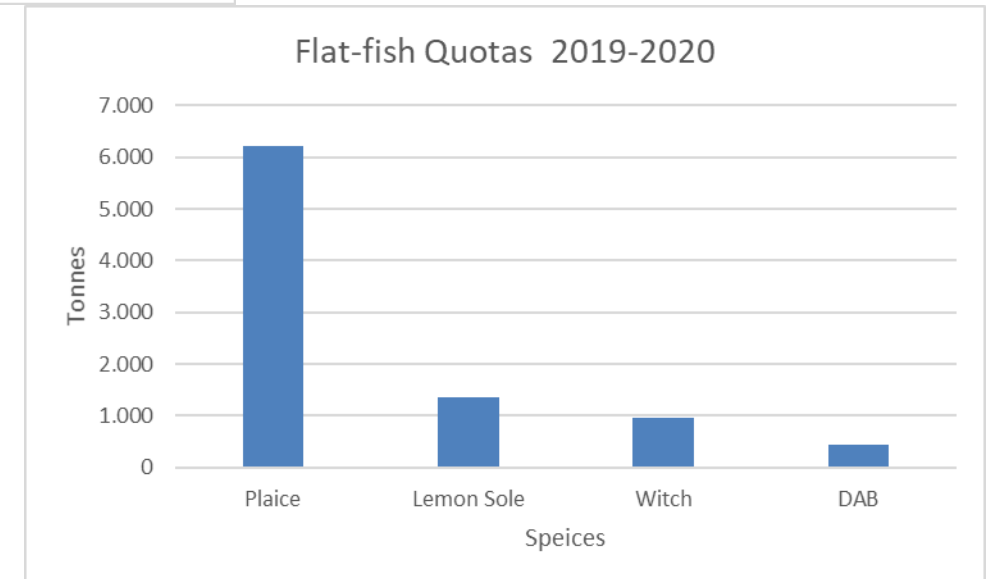
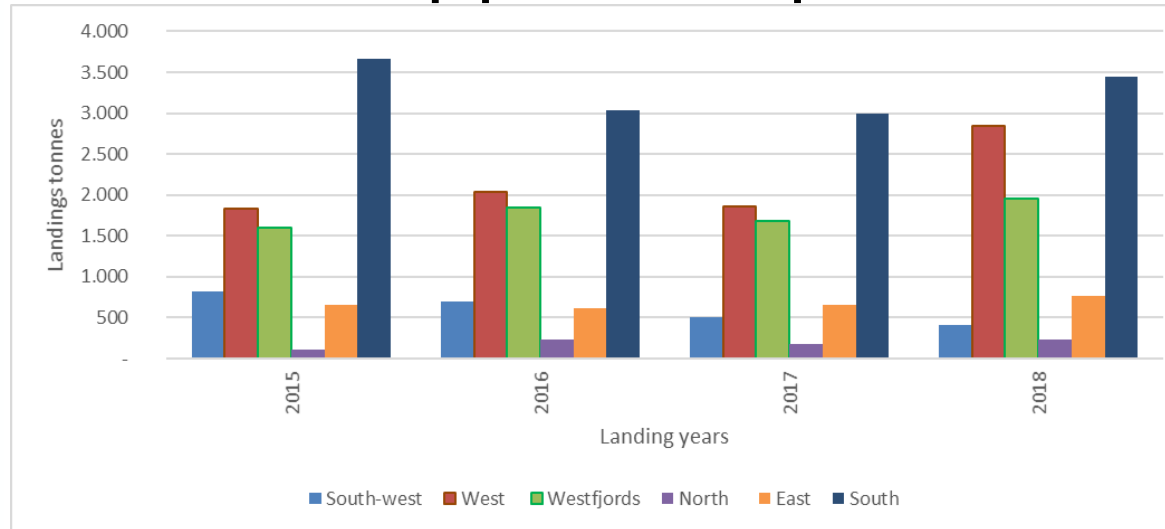
Geographical distribution of suppliers and size of suppliers / quotas - Plaice



Non-standardised estimates of CPUE (left) and fishing effort (right) from demersal seine (kg/set or nr. of sets) in red and demersal trawl (kg/hour or towhours) in blue.

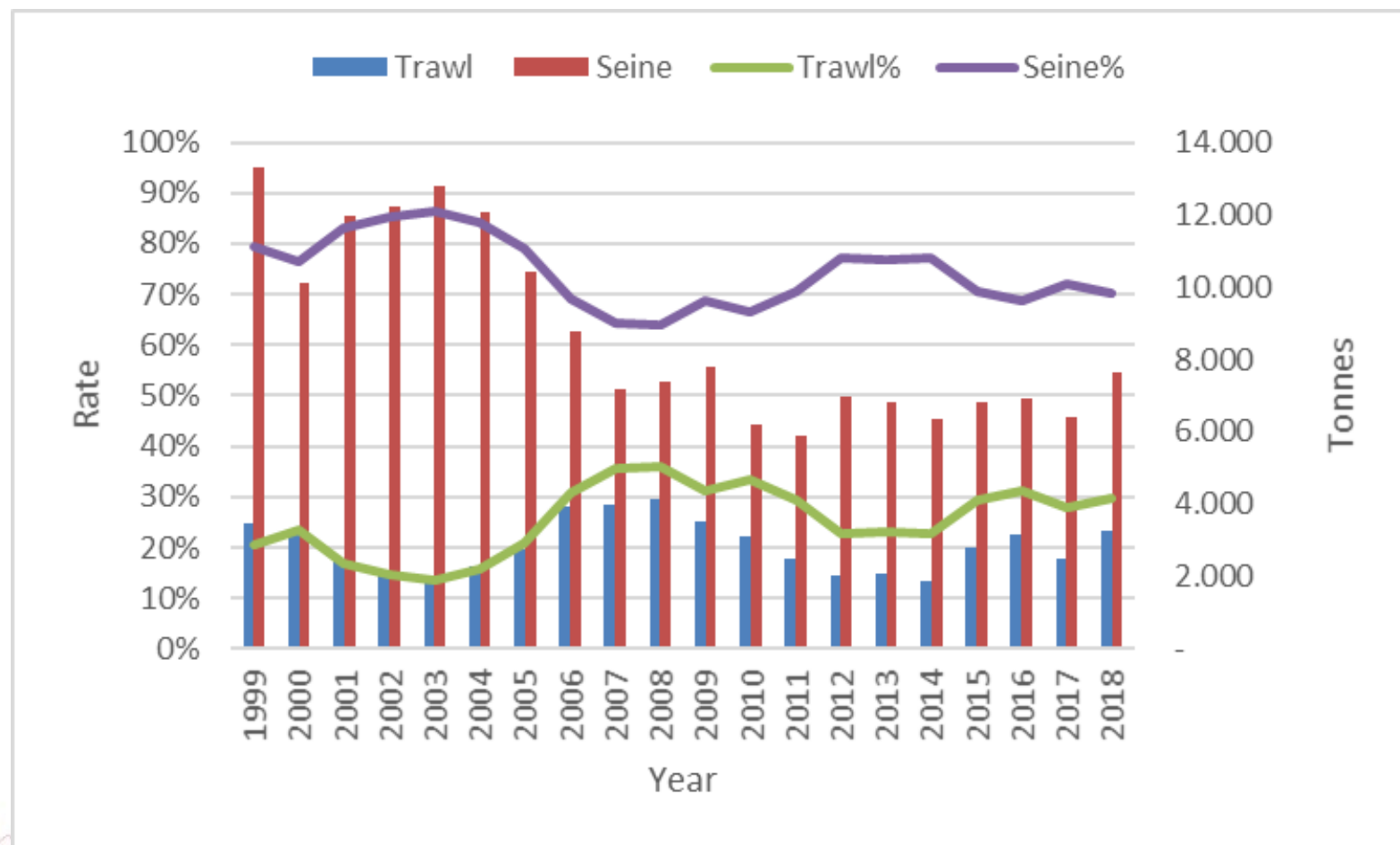


Geographical distribution of suppliers and size of suppliers / quotas



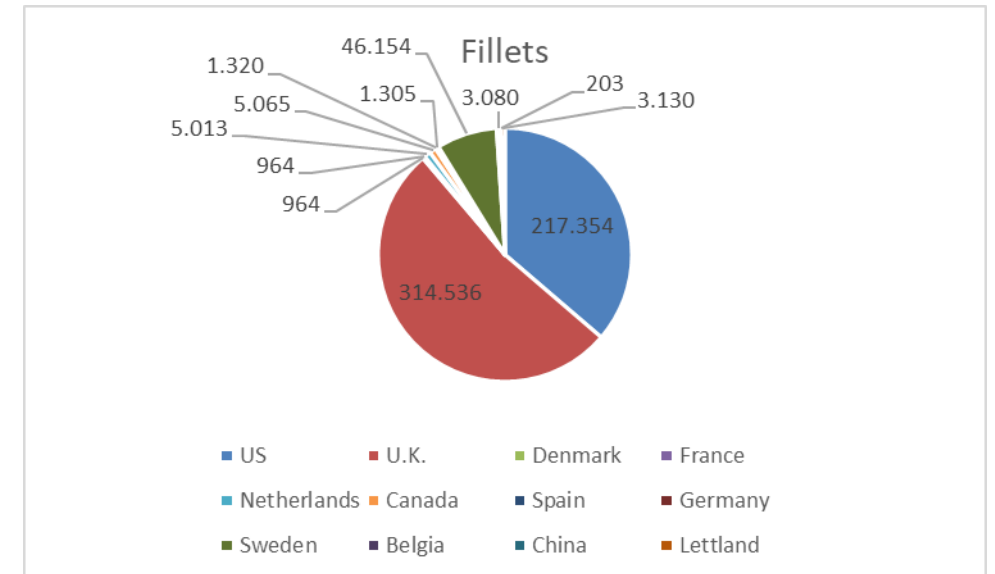
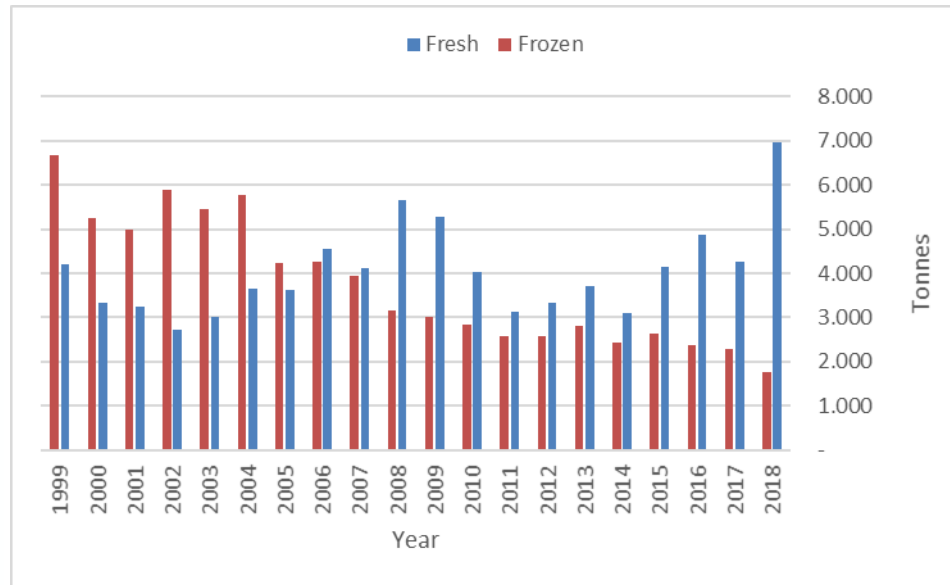


Fishing method





Technological status of national processors

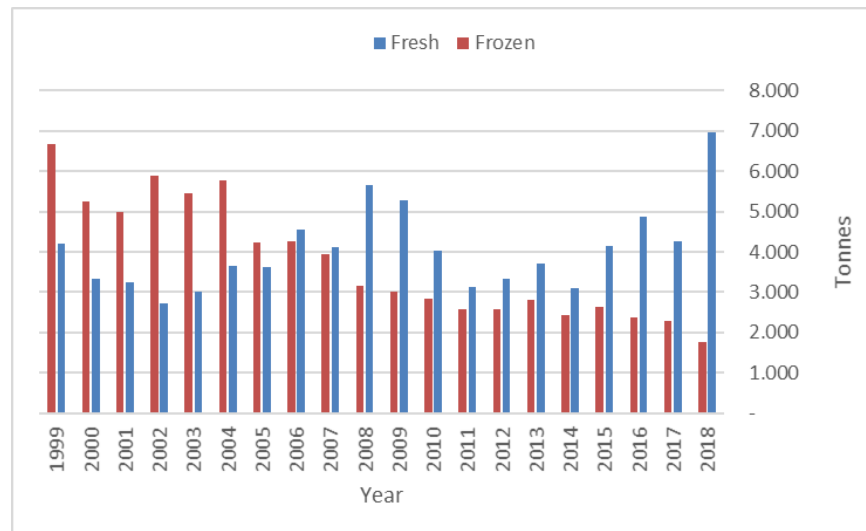




Processing / products – processed nationally / processed abroad

Whole fresh	Plaice	Sole	Lemmon sole	Dab	Long rough dab	Witchs	Other
US	1.659	378	365	0			100.320
Belgium	17.667	5.497	23.517	37.600		5.903	35.926
U.K.	1.483.489	2.401	774.575	407		12.648	30.909
Denmark	76.081	18.577	13.401		80	16.831	3.278
France	7.272	0	4.359			108.229	101.520
Neterland	2.686.222	53.105	206.863	240.163		108.229	3.537
Canada	538	0	350				
Poland	306	27	46				
Spain	3.044	5.519	3.860		473	564	270.030
Norway	0		237				
Germany	70.514		14.383				1.477
Czech Republic			220				
Ireland			429				
Sweden			4.704				
Total	4.346.792	85.504	1.047.309	278.170	553	252.404	546.997

Whole frozen	Plaice	Lemmon sole	Dab	Long rough dab	Witchs	Other
US	379				126.777	3.682
U.K.		9.938		1.696		
Denmark		788				
France					12.580	
Neterland			66.300		6.336	16.213
Canada	54					
Poland	41.776		202			3.675
Spain			865		256.666	166.258
Germany	5.341	1.326				
Sweden		88				
Greace	2.455					
China		14.586		4.968		
Latvia		900				
Portugal				573		
Thailand						1.113
Total	50.005	27.626	67.367	7.237	402.359	190.941



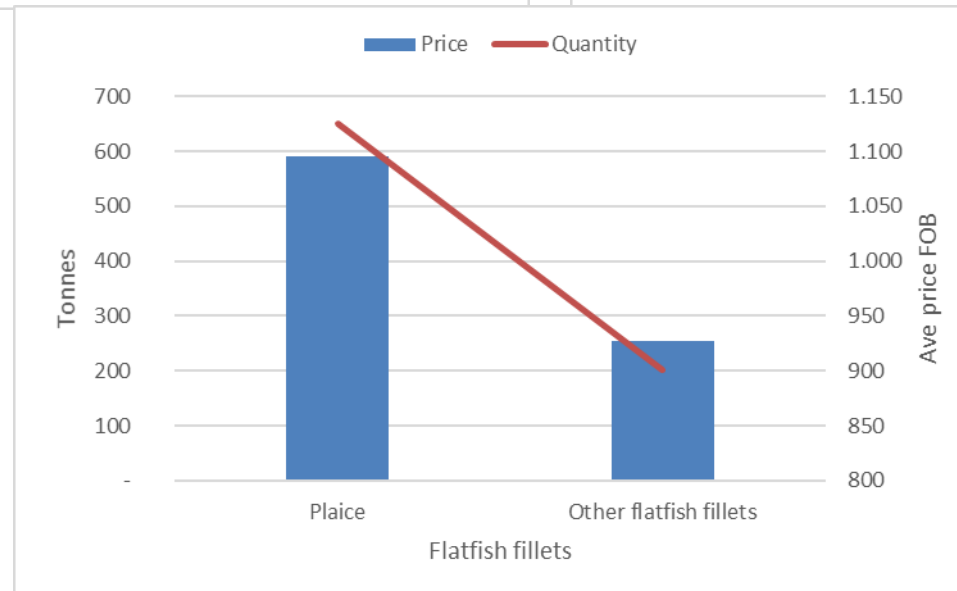
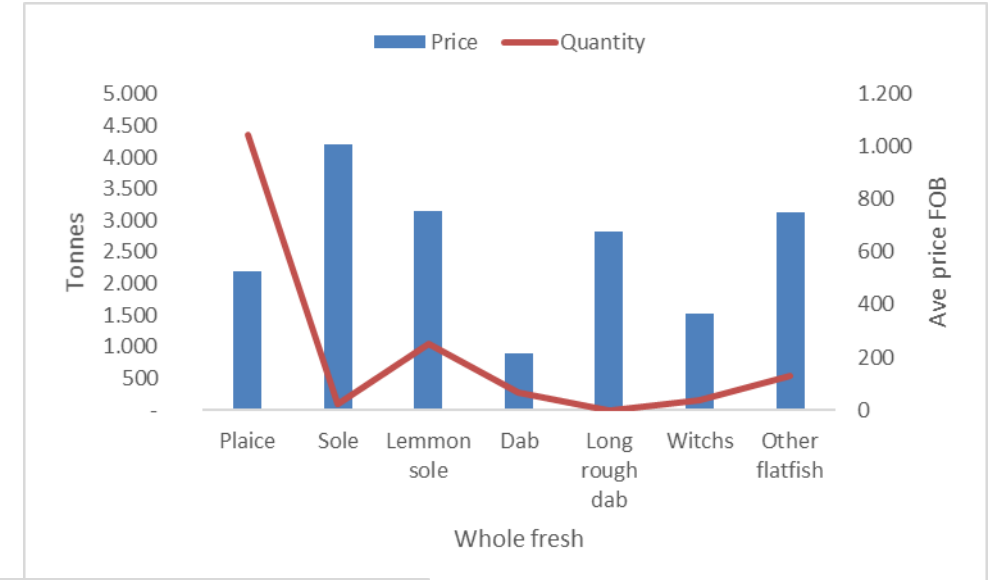
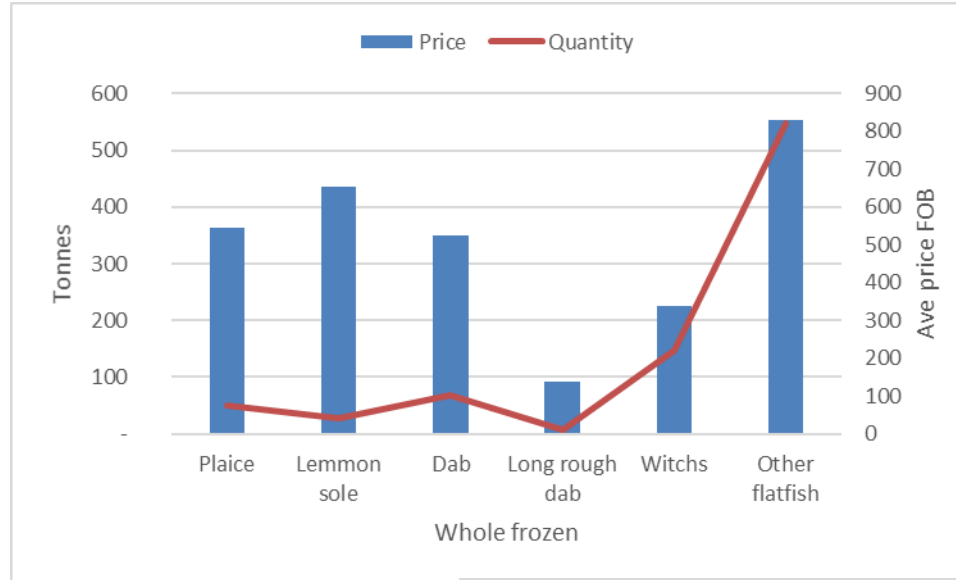


Markets (national and exports – which products to what markets – Prices



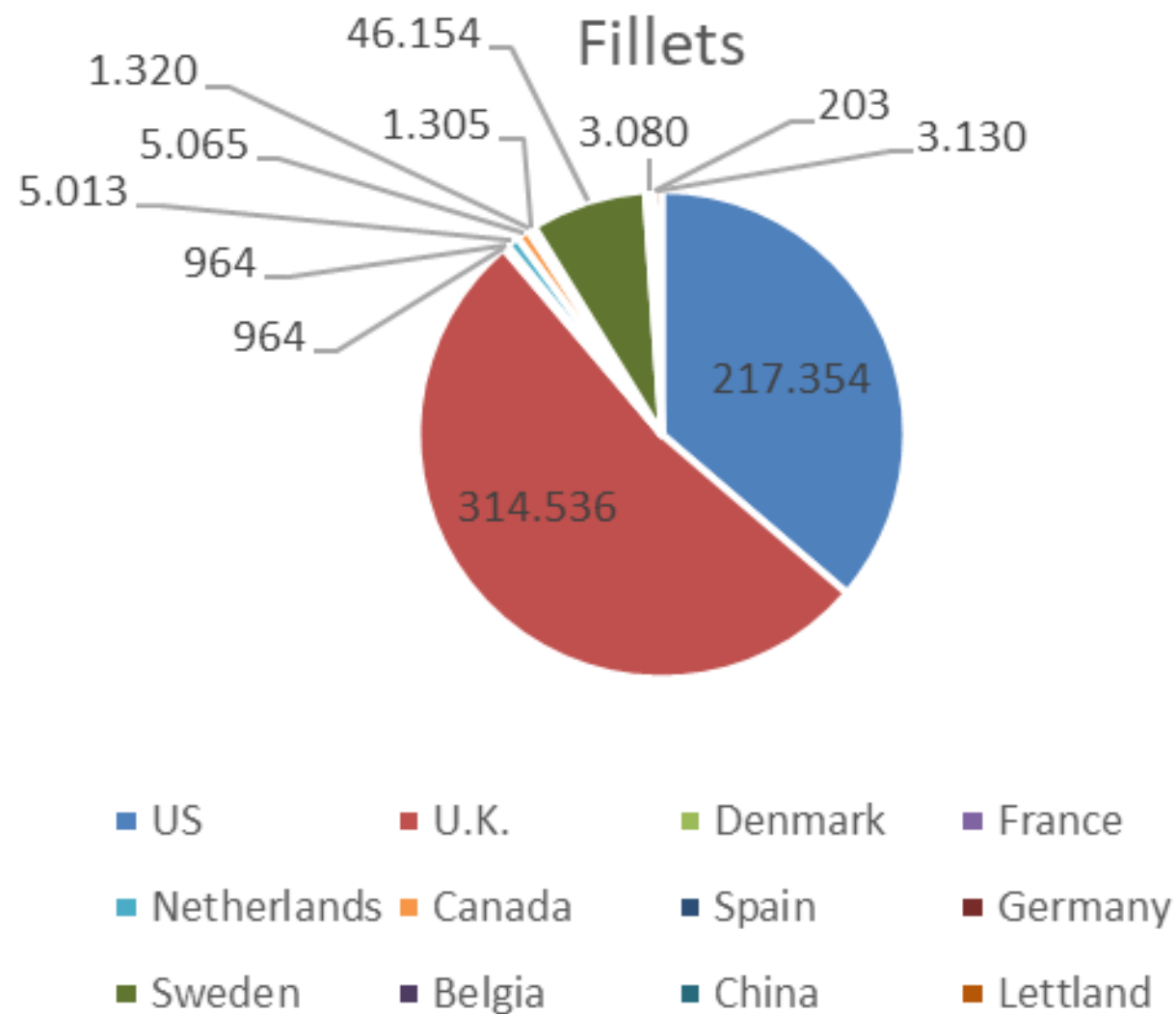


Markets (national and exports – which products to what markets – Prices





Export of fillets





Outlook for Markets

- External factors e.g. landing obligation, legislations, Brexit...
- Internal factors e.g. consolidation of quotas, expensive technology for processing, processing in Asia/E-Europe, little new entry of people in the sector.
- **MFRI advises for flatfish catches 2019-2020 when MSY approach is applied:**
 - Plaice catches in the fishing year 2019/2020 should be no more than 6985 tonnes.
 - Witch catches in the 2019/2020 fishing year should be no more than 1067 tonnes.
 - Lemon Sole catches in the fishing year 2019/2020 should be no more than 1341 tonnes.





Outlook for Markets

But export of fresh flatfish has increased from little over four thousand tons to seven thousand tonnes. It matches the trend of higher demand on the market for fresh fish in most of the main markets. Only a small fraction is exported filleted and frozen from Iceland.

Large portion of the flatfish landings in Iceland is a by-catch and quantity is not enough for investment in technical advanced processing. With high labour cost it would be challenging to make a value adding by filleting or other processing for export markets. This is way processing, including filleting and other value adding, is largely done outside of the Nordic countries, for example in UK, Netherlands, Germany and Poland. Flatfish is a valuable species but is labour intensive for processing.

Plaice, the main species, is too big for filleting machines, so half of it is hand filleted.



Conclusion

- **Smaller producers aiming for niche markets**
- **Large companies sell flatfish on auction markets and buy cod instead**
- **Large portion is a by-catch**



- **Thank you**