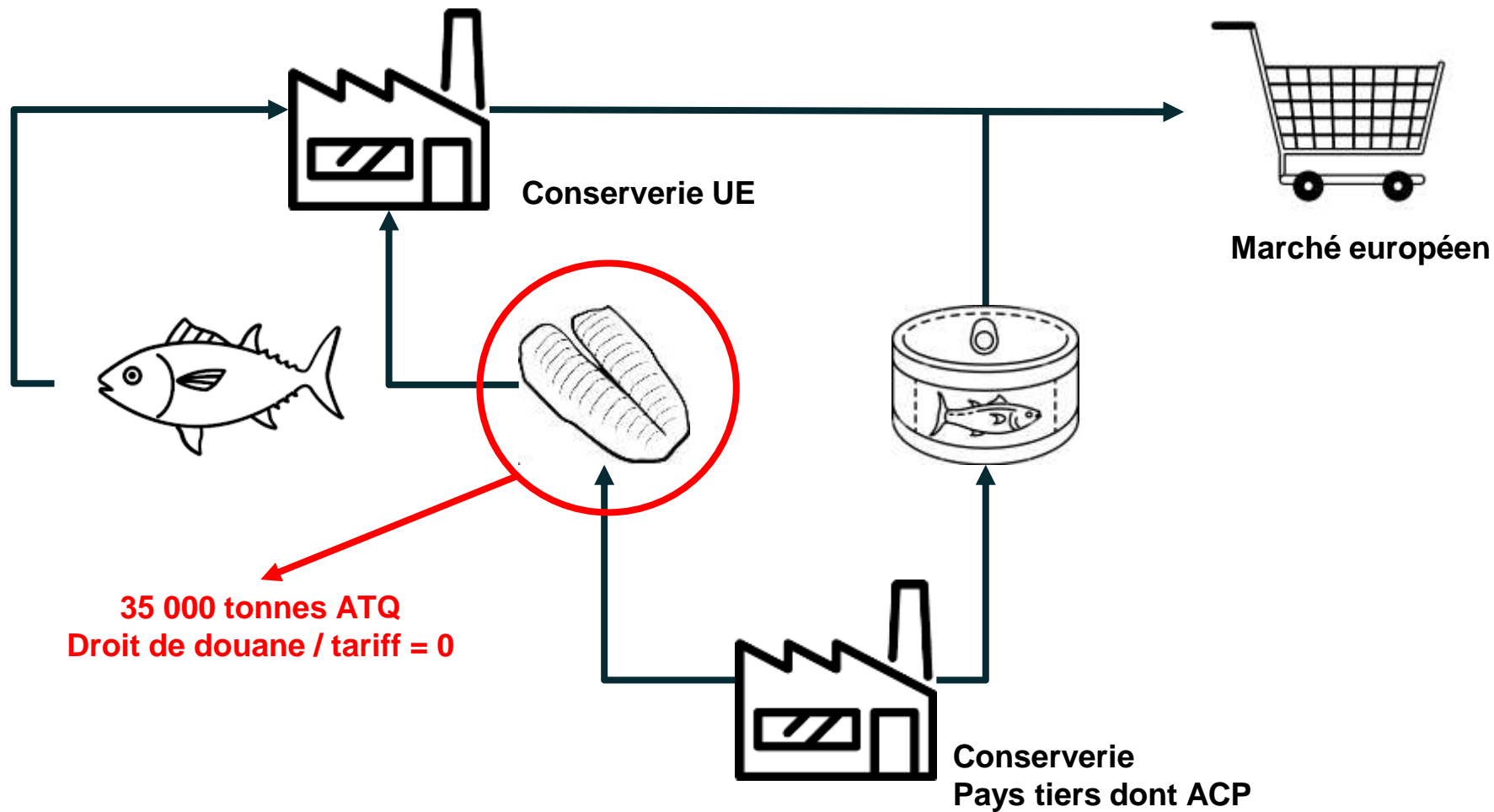


europêche Tuna Group

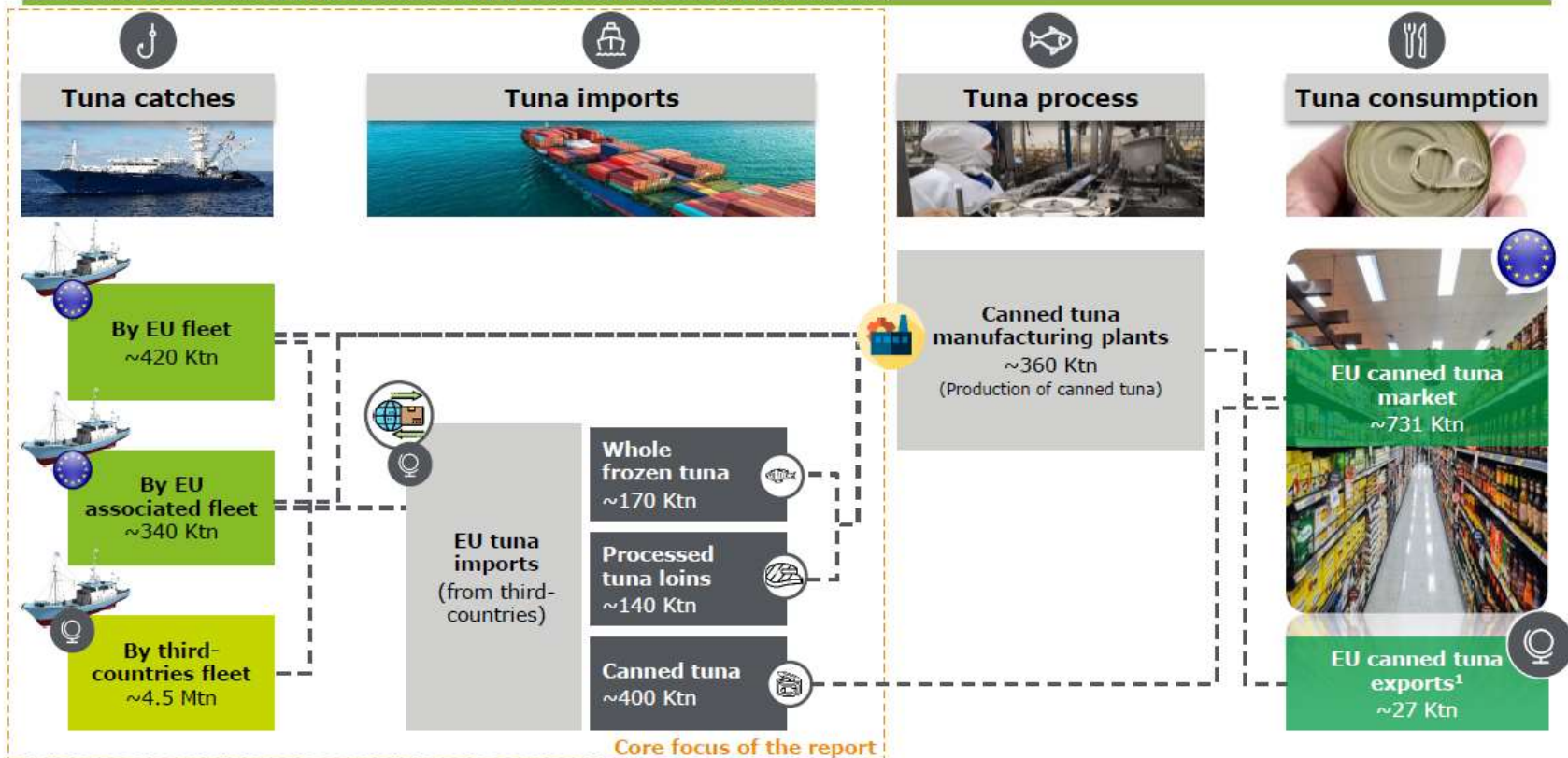
**Nouvelles négociations UE sur les
contingents tarifaires autonomes de longes de thon**

Conséquences sur les exportations des pays ACP





Overview of the EU and third-country tuna value chain (Ktn; 2018)



(1) From EU countries to non-EU countries
Source: Monitor Deloitte

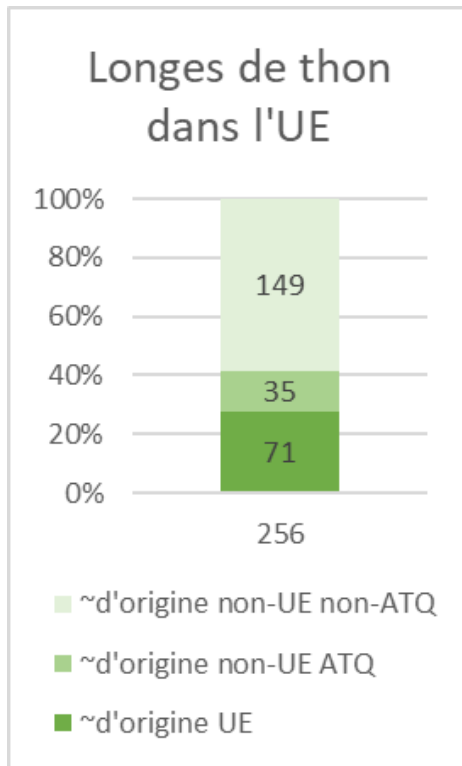
Que sont les contingents tarifaires autonomes?

		Whole frozen tuna	Tuna loins	Canned tuna
No agreement	Tariff	0%	24%	24%
	Volume limit	No limit	No limit	No limit
	Imports into the EU 2018	170 Ktn	20 Ktn	143 Ktn
Preferential agreements	Tariff		0% ¹	0% ¹
	Volume limit	n.a.	Depending on the country	Depending on the country
	Imports into the EU 2018		95 Ktn	255 Ktn
Autonomous Tariffs Quotas (ATQs)	Tariff		0%	
	Volume limit	n.a.	30 Ktn (2019-20)	n.a.
	Imports into the EU 2020		~50 Ktn ²	

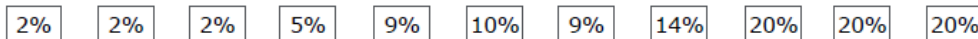
Focus of the analysis

(1) Some countries can have a reduced tariff (e.g. Mexico 6%); (2) See slide 19 for more detail of the import volumes benefiting from ATQs
Source: EUMOFA-Eurostat; Monitor Deloitte

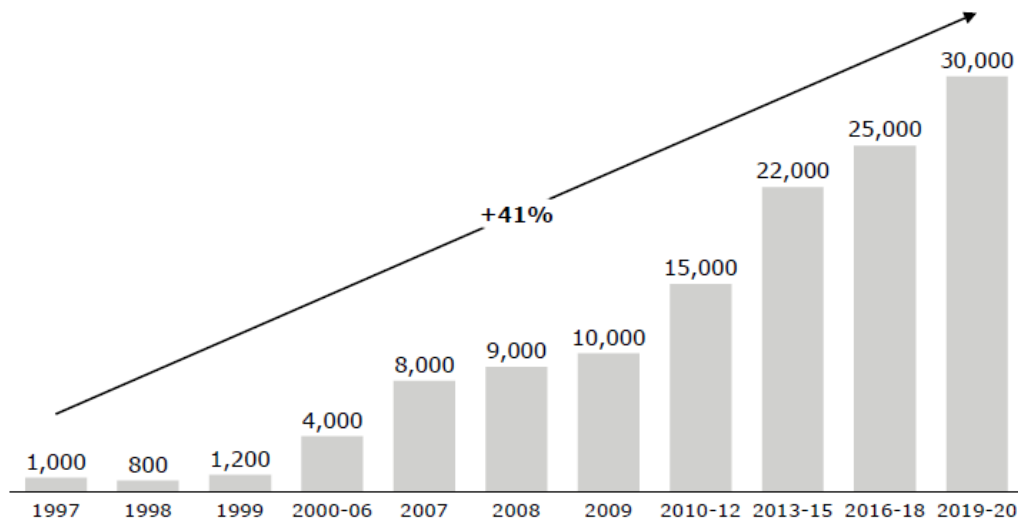
Provenance des longes de thon dans l'UE et part des ATQ



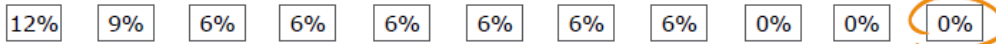
% ATQs over EU imports¹



ATQs import volumes

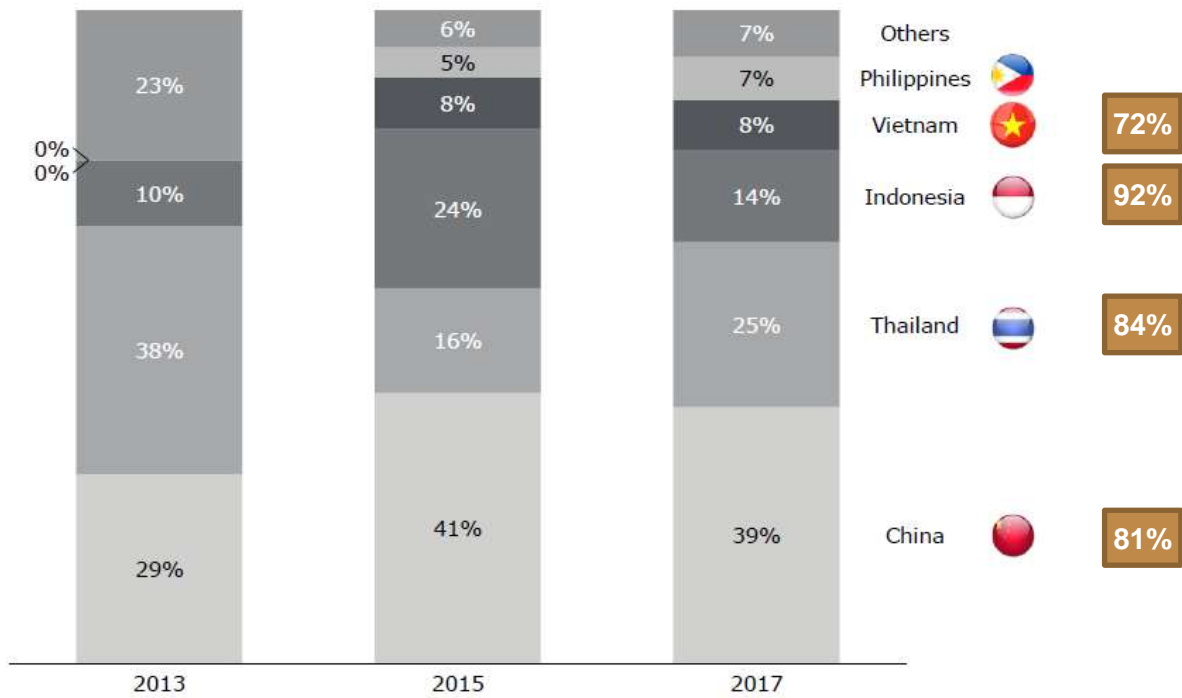


Tariff duty



(1) Tuna loins imports from non-EU countries including: skipjack, yellowfin and other tuna species (e.g. bigeye, albacore)
Source: EUMOFA-Eurostat; FAO; Forum Fisheries Agency (FFA); EU Council Regulation; Monitor Deloitte

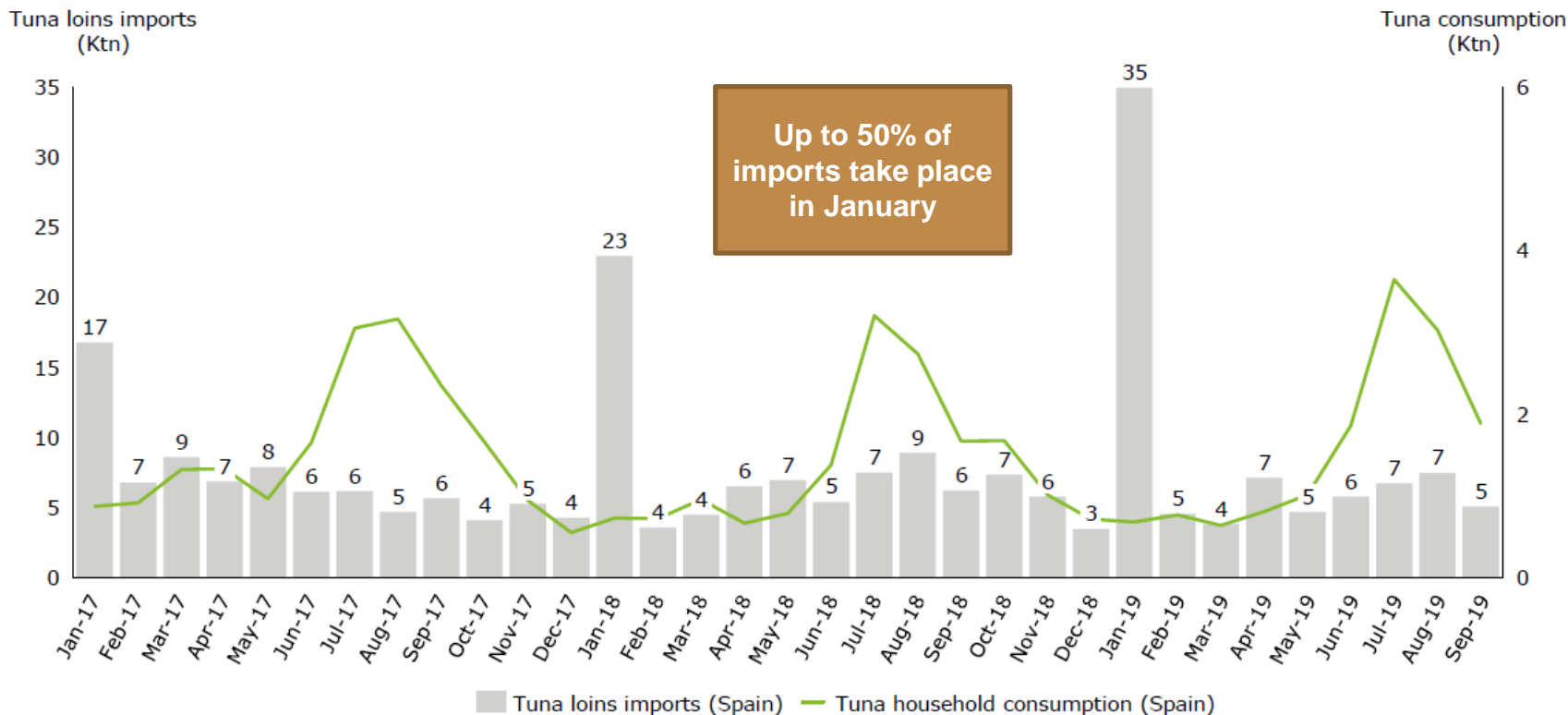
Provenance des longes de thon ATQ



(1) African, Caribbean and Pacific; (2) Generalized System of Preferences
 Source: EU Commission; Monitor Deloitte

81% Part des importations réalisées en Janvier

Spain: tuna¹ loins imports (extra-EU) vs. tuna household consumption² (Ktn; Jan. 2017-Sep. 2019)



(1) Species included: skipjack, yellowfin, bigeye and miscellaneous; (2) Household consumption of tuna products
 Source: EUMOFA-Eurostat; Monitor Deloitte

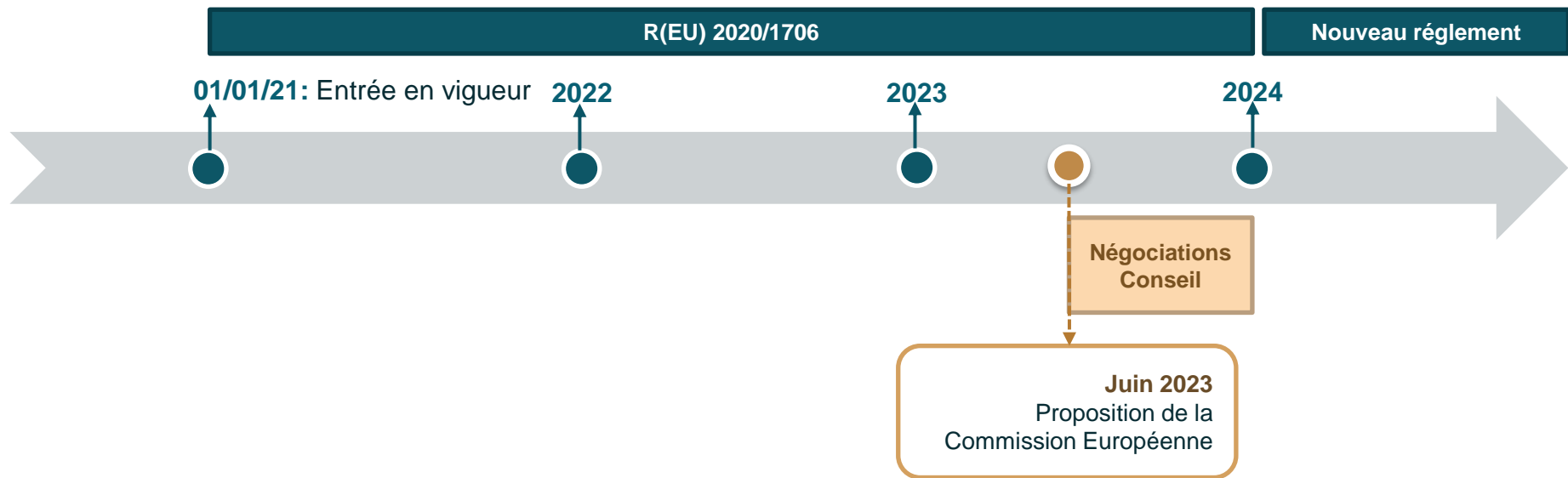
Conséquences sur le marché des longes et de la conserve

- Compétitivité accrue dans des conditions inégales:
 - standards et couts de production généralement moindres en Asie
- Baisse des prix
- Erosion progressive de la préférence ACP

Recours

- Evolution vers des produits à plus haute valeur ajoutée
- Dialogue avec l'UE – cas de l'équateur

Négociation du Nouveau règlement ATQ



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