

STRUCTURE AND TRENDS IN SARDINE, ANCHOVY AND BLUEFIN TUNA PROCESSING IN THE ADRIATIC SEA BASIN

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What is the first thing that comes to your mind when we talk about fishing and processing in the Adriatic Sea?



Adriatic sea

- one of the most important fisheries and seafood processing sectors in the Mediterranean
- three species play a central role:
 - Sardine
 - Anchovy
 - Bluefin tuna
- Sardine: the most important commercial species in Croatian fisheries, accounting for more than 60 % of the total fish catch
- Anchovy: the second most important species of small pelagic fish
- Tuna: in the Adriatic, it is grown in cages (tunnel farms) and is a key export product that fetches a high price on the world market



The Adriatic value chain

From Sea to Consumer

1. Farming/Fishing



2. Processing



3. Distribution



4. Export



5. Retail & Food Service



SARDINE PROCESSING

PRODUCTS:

- FROZEN PRODUCTS,
- SALTED PRODUCTS,
- CANNED PRODUCTS



SARDINE TRENDS



MAIN TRENDS

- Resource fluctuations
- Rising production costs
- Growing demand for premium products
- Increasing focus on value-added processing

LESS VOLUME, MORE
VALUE

THE MOST EFFICIENT MACHINES ARE THE W40, W50, W60:
WOMEN WITH EXPERIENCE



ANCHOVY PROCESSING

PRODUCTS:

- FROZEN PRODUCTS,
- SALTED PRODUCTS,
- MARINATED PRODUCTS,
- FILLETS,
- PREMIUM RETAIL PRODUCTS



ANCHOVY MARKET TRENDS



MAIN TRENDS

- Convenience products
- Ready-to-eat seafood
- Private label production

- HoReCa demand growth

LESS VOLUME, MORE
VALUE

BLUEFIN TUNA INDUSTRY



SUSTAINABLE BIO-FARMING

FARMING CYCLE - 3-18 MONTHS

BLUEFIN TUNA CATCHING SEASON

HARVESTING TECHNIQUE - "IKE JIME"

ICCAT REGULATIONS AND TRACEABILITY



One of the highest-value seafood products in the
Mediterranean

BLUEFIN TUNA INDUSTRY



PROCESSING - ON THE SEA AND PRODUCTION PLANT

PRODUCTS - BLOCK, SAKU BLOCK, POKE

EXPORT MARKETS

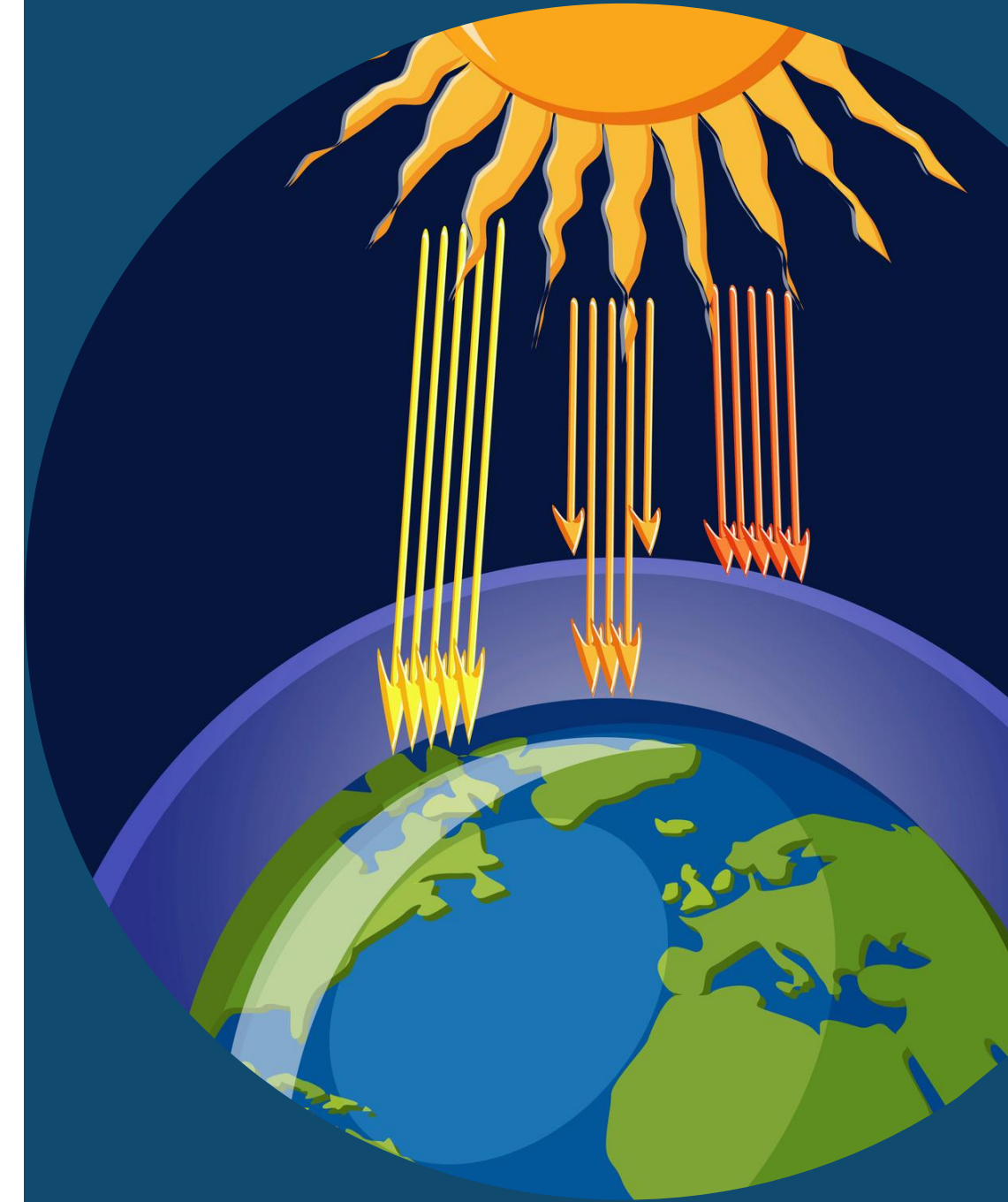
INTERNATIONAL DEMAND - A++ QUALITY FOR SUSHI AND SASHIMI

SUSTAINABILITY EXPECTATIONS



AKAMI, CHUTORO, OTORO
PARTS

CHALLENGES FOR THE INDUSTRY



OPPORTUNITIES

- Added-value products
- Product innovation
- Digital traceability
- Sustainability certification
- Export diversification



Future growth lies in differentiation.

PELAGOS NET FARMA



WHO WE ARE?

- company located in Zadar port, Croatia, since 2013,
 - aquaculture,
 - fishing fleets,
 - bluefin tuna processing,
 - manufacturing delicacies from anchovies and sardines
-
- modern logistic centre,
 - cold storage plant (capacity 2000 t),
 - IQF device (Sabroe CAF400 – capacity 2000 t/h),
 - -60 – storage for bluefin tuna,
 - delicacy manufacture plant – capacity 1000 t/year,
 - the farm is located 9 Nm from our headquarters

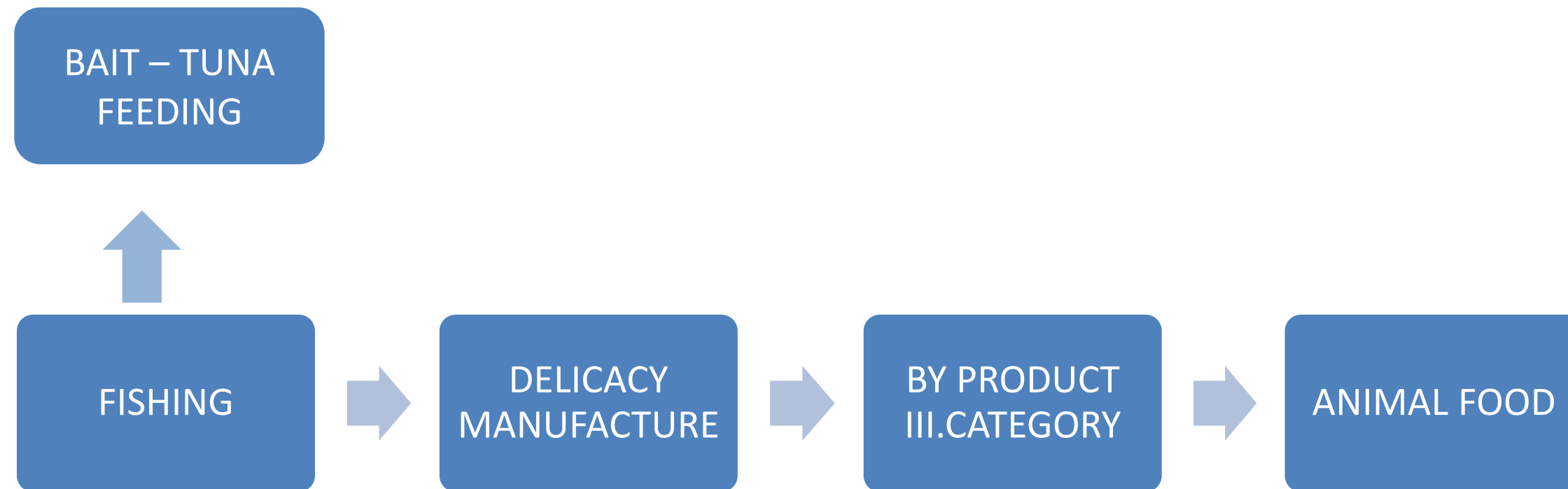
<https://www.youtube.com/watch?v=P3L4SyrWZk&t=15s>



PELAGOS IN TRANSLATION – THE
OPEN SEA

PELAGOS NET FARMA

-as a Part of Adriatic Value Chain-



PELAGOS NET FARMA – and the future of the sector

Long-term market

Quality (IFS higher level, Halal, Kosher certified)



Sustainability

Traceability (IFS, ICCAT)

The future of Adriatic seafood is not about producing more – it is about producing better.



CONCLUSION

- Sardine, anchovy and bluefin tuna remain strategic species for the Adriatic economy.
- The industry is moving from volume-driven to value-driven growth.
- Sustainability and traceability are becoming key competitive advantages.
- Companies that innovate and adapt will lead future development.



THANK YOU!

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