FINFISH STUDY 2014

A.I.P.C.E.-C.E.P

EU Fish Processors and Traders Association

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1. The Purpose of the Finfish Study

The European fish and seafood added value processing industry relies on a consistent and sustainable supply of raw materials to satisfy consumer demand for fish products, both for domestic and out-of-home markets.

The sectors we represent account for more than 3,500 enterprises, 100,000 jobs and 29 billion € in turnover.

AIPCE-CEP and its members use the Finfish Study at EU and member state level to exemplify the need for imported seafood, particularly whitefish to produce added value seafood within Europe. The availability of a continuous, sustainable supply of raw materials is a key factor in maintaining and allowing expansion of employment and trade opportunities generated by the fish and seafood processing industry in Europe.

The types of fish and seafood and the species mix within those has extended considerably in recent years as logistics and access has improved at the same time as consumers become more aware of the variety available to them. Whilst whitefish species continue to be important, the expansion of other wild caught fish such as tuna, pelagics and cephalopods has provided greater choice for consumers and significant opportunity in processing across many member states.

Aquaculture's rapid expansion in the last two decades has further fuelled these opportunities and several important species have become well established in the EU. For some this has occurred because the cultivation is locally based but again the majority of supply comes from outside the borders of the EU and our dependence on imports from aquaculture is at least as high as in wild capture species.

In every sector imports have been the lifeblood of the industry for many years and fulfil an essential role.

This study has been prepared by and for the processing industry in Europe for more than 20 years and has been a useful tool in explaining the activities of the fish and seafood processing industry and trading sector. Other publications and databases have developed that go into more detail about species and categories or that follow the daily events of the industry more closely but we still attach value to the preparation and publication of this annual study that shares AIPCE-CEP's opinion to how the trade is shaping, explains our perception of key issues affecting that trade and the importance of finding pragmatic and viable solutions to sustaining these activities.

Competition for fish and seafood is now on a global stage and represents one of the largest sectors of all in international trade. The need to conduct this trade responsibly has never been greater and within AIPCE-CEP we have been engaged in several initiatives to ensure our role in this is properly fulfilled and understood.

We strive to take an active role in helping shape regulatory matters to achieve their aims but within a pragmatic framework that ensures proper implementation and effect.

AIPCE-CEP is pro-active in leading the dialogue and where appropriate over many years we have taken actions within our supply chains ahead of regulatory controls to meet the expectations of stakeholders and consumers. At the same time, we are always mindful that this needs to be done whilst achieving and maintaining a consistent, regular and competitive offering.

The changing availability from both wild capture and cultivated fisheries is always a challenge and AIPCE-CEP has responded to this. The provision of safe, nutritious and affordable food has been the activity of AIPCE-CEP members since its inception. Accepting the responsibilities this imposes on us to play our role in managing resources and their proper use has been at the forefront of our activities and we are acutely aware of the many considerations that this comes with for others and ourselves. We are confident that the efforts going into precautionary management, resource allocation and sustainability are paying off in many parts of the world.

The Finfish Study is intended to provide insight into some of these developments and how the supply and consumption are changing.

2. Overview of the Study Findings

All figures in the study have been converted to Whole Fish Equivalent (WFE).

There can be gaps/anomalies in the official statistics that are corrected retrospectively. Consequently, we adjust previous year's numbers when the final versions become available but these changes are normally minor.

Key findings

- **Total market supply 14.2 million t up 1.7 %**
- **Imported share slightly down to 63 % (8.9 million t)**
- **Whitefish dependency unchanged at 89 % for wild capture species**
- **EU catches for whitefish species have increased marginally (+1 %) but quota utilisation continues to deteriorate**
- **Exports slip back by 5 %**
- **Tuna, salmon and cod are more or less equal in consumption at WFE of around 1.1 million t each**
- **Supply for per capita consumption is up by 0.6 kg at WFE**
- **Competition is intensifying from other countries and regions**

2.1 Data Base

This report is mainly based on statistics taken from Eurostat 2013 data and refers to the EU 27 group who were member states at the beginning of the year (i.e. we have not included statistics for Croatia who joined in May). Any other data ascribed to source.

Eurostat provides information by fishery product, species and/or category. We have undertaken to provide a common comparison base by converting these products back into the actual quantities of whole fish equivalent (WFE) which is consistent with quota and allocation data and we believe is the fairest means of comparison. All tables and figures presented refer to this unit of measure (please see chapter 3 which explains how we do this).

At the time of compilation of the figures for use in this study, there can be gaps/anomalies in the official statistics because of reporting issues. These are corrected retrospectively and we adjust previous year's numbers when the final versions become available.

Normally these are minor adjustments and do not affect the underlying accuracy of the statistics. To maintain consistency we backdate any such adjustments to 2006, which allows us to keep the comparison since EU25/27 was created. (The commentary will highlight these as appropriate).

Our final database check is the FAO figures, which are now incorporated for the latest release of statistics from 2011.

The main focus of the Finfish Study is whitefish including freshwater cultivated species like pangasius and tilapia. The fish industry is far more diverse than this and we include data about shellfish, cephalopods, large and small pelagics as well as imported prepared products such as canned foods.

When aggregating the data it becomes apparent just how large and complex the fish trade is within the EU markets and how important the EU markets are in global trade context. It also shows that other regions and countries are potentially competitors for the same fish species and we must be mindful of maintaining access to these global supplies.

We continue to refine the accuracy of the data presented in particular the estimates for non-food use catches and also aquaculture numbers. We are also indebted to many AIPCE-CEP members who help in the compilation and interpretation of the statistics.

2.2 Key Finding from Statistical Analysis

After adjusting previous year's figures the data is then suitable for comparison.

For 2013 fish consumption in Europe appears to have recovered much of the apparent losses from 2012 with growth of 2.9 %. This is below previous peaks but only slightly below the average since EU27 formed.

We will look at the individual species in more detail in later chapters but the summation says that the EU is catching more, cultivating slightly more, importing a little more but exporting slightly less.

Reliance on imports remains stable at just under 63 %.

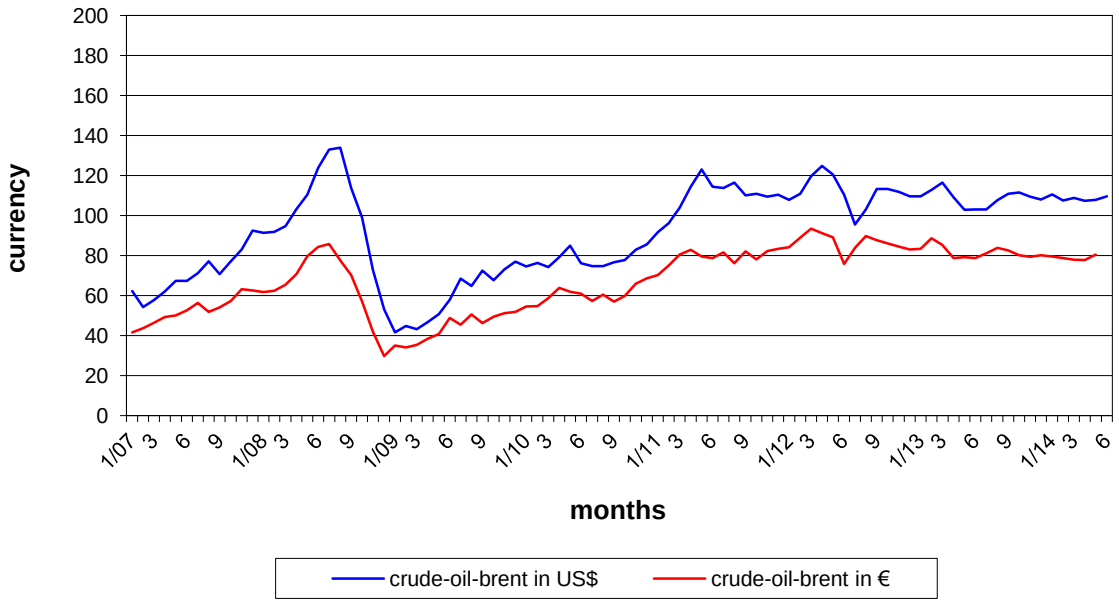
2.3 Costs

During 2013 the $/€ fluctuated in a range from 1.28-1.38 with the *euro* at its weakest in the first half of the year. However, compared to the previous two years the *euro* was more stable in 2013.

Other key currencies to fish trading, notably the Japanese Yen reversed its long-term period of strength and became a progressively weaker currency relative to the euro as the year developed moving from 115 to 145 in exchange.

Oil prices stayed at an elevated although relatively stable level throughout 2013 and have continued to pose a real challenge to vessel operators.

Fig. 2.3 Comparison crude-oil-brent in US$ and €



2.4 Regulatory Review

Summary

This has been another busy year on the regulatory front for AIPCE-CEP and its members. Effective representation of our members' interests remains at the forefront of our activities. We were successful in ensuring that our key objectives were met with regard to the reform of the Common Fisheries Policy and the EU Common Organisation of the Market in Fishery Products.

The latter was of particular concern because the Commission's original proposals would have added unnecessary cost to business and caused confusion for consumers. Since the new regulations were agreed, we have continued to work with member states and the European Commission about the detail of how the new legislation will be implemented.

At the time of writing, we are beginning to work on AIPCE-CEP's requests for the next round of Autonomous Tariff Quotas (ATQs). Along with work on the EU's Free Trade Agreements with third countries, this will form a key part of the work of the Trade Issues sub-group over the coming months.

EU IUU Regulations

The EU's IUU regulation is a firmly established feature of the international trading environment and in July 2014, the Commission published the long awaited consultants' report on the operation of these arrangements by member states.

In November 2013, the European Commission warned three countries - Curaçao, Ghana and South Korea - that they were not doing enough to fight illegal fishing. The Commission announced in July 2014 that it would now grant each country an extra six months to improve the situation. The Commission will review their progress made at the end of this period.

In March 2014, Belize*, Cambodia and Guinea were the first countries to be formally identified by the EU as "non co-operating" under the IUU legislation and the import into the EU of fishery products caught by fishing vessels flying the flag of those countries is prohibited. The Commission is closely monitoring a number of other countries activities and has formally warned them that they need to improve their control methods or similar action may be taken against them.

The Philippines and Papua New Guinea received a formal warning from the Commission in June 2014. The Commission will evaluate each country's progress on an individual basis. The first progress evaluation is expected within 6 months of the decision being taken.

In October 2014, the Democratic Socialist Republic of Sri Lanka was identified as a third country that the Commission considers as a non-cooperating third country in fighting illegal, unreported and unregulated fishing. This Decision shall enter into force on 14 January 2015.

Fiji, Panama, Togo and Vanuatu get a "green card" in October 2014.

AIPCE-CEP remains fully supportive of the EU's determination to stop IUU fish being supplied to the European market and will continue to work closely with Commission and member state officials to resolve any issues that may arise in order to safeguard the industry's supply chains. In particular, we are pressing for greater transparency by the Commission on the progress of their discussions with exporting countries and the methodology that is used to assess an exporting country's performance.

**In December 2014, Belize was removed from the list of non-cooperating countries.*

Common Fisheries Policy/CMO Reform

All of the legal instruments were agreed in time to enter into force on 1st January 2014.

The aim of the reformed policy is to end overfishing and make fishing sustainable environmentally, economically and socially. The reforms aim to support sustainable growth of the fishing sector, create job opportunities in coastal areas and ultimately provide EU citizens with a healthy and sustainable supply of fish.

Of particular interest to AIPCE-CEP members is the provision for a Markets Advisory Council (MAC). This had been a key objective for the processing industry, which had been pressing strongly for a formal framework to consider horizontal supply chain issues that would not be adequately covered by the RACs and their successor regional management bodies.

AIPCE-CEP has been working closely with the European Commission and other stakeholder representatives to draw up proposals for how such MAC should be constituted and its exact terms of reference. This work is ongoing and should be resolved in the next 12 months.

Tariff Regulation

As the figures in successive AIPCE-CEP studies have demonstrated, EU processors are heavily dependent on third country supplies to meet consumer demand. For many years, the EU operated a system of open-ended tariff suspensions for products of particular importance to the processing sector. A number of autonomous tariff quotas (ATQs) which were subject to both time and quantitative limits supplemented these.

In 2012, the previous arrangements were replaced by a single system of ATQs to run for three years from 1st January 2013. Over the coming months AIPCE-CEP will work actively with the Commission and member states to ensure that the supply of key raw materials is maintained when the existing three-year regulation expires at the end of 2015. A key objective will be to ensure that these arrangements continue and that the detail of the new round of concessions will be agreed in sufficient time to provide industry with the necessary certainty over the arrangements, which will apply, from 1st January 2016.

Free Trade Agreements

At the time of writing, the EU is in active negotiations with several important trading partners with a view to concluding reciprocal free trade arrangements. AIPCE-CEP members hope that these agreements are balanced between their need for raw material and the sensitivity of certain products for the EU processing industry. We will continue to monitor progress closely and ensure that the potential benefits for EU processors are achieved.

Environmental Standards

In previous studies we have highlighted the development of independent certification across key fisheries around the world. The majority of these schemes have been adopted for use by processors, brands and retailers as a means to demonstrate their commitment and support towards sustainable practices in fisheries. We recognise that such schemes must be able to demonstrate proper rigour and process to maintain their credibility. We also believe that good public management of fishery resources is essential.

Within AIPCE-CEP, we have a working group focused on sustainability and this has published our 'Expectations from Seafood Environmental Standards' on the AIPCE-CEP website (www.AIPCE-CEP.org).

3. Methods of Back-calculation to Whole Live Fish Weight (WFE) Utilised for Imported Headed and Gutted Fish, Fillets and Portions

Eurostat data is for fishery products in their imported form. It does not estimate the amount of whole fish from which the fishery products are derived.

Since the 2009 Finfish Study AIPCE-CEP has adopted its own set of conversion factors based on actual processing yields gleaned from the experience of its members (see tab. 4.17). In doing this we are trying to reflect more accurately the differences between major processing methodologies and regions around the world and to allow us to assess more realistically how much of the global resources are used in the EU market.

Official conversion factors enable some consistency but in our opinion do not accurately reflect the differences between regions. Prior to 2009, we used the official CFs of the German government.

When we adjusted the conversion factors we re-stated the numbers back to 2006 (i.e. the formation of EU25 and moving on to EU27) to keep comparisons valid.

We must re-iterate that there is an element of approximation that comes from this process but we believe the factors now used are a far more accurate reflection of the reality of fish processing in today's global supply network.

In particular it helps demonstrate that improved utilisation of fish once it has been caught has been a major factor in continuing the expansion of the consumption. Yield and recovery is improved through technological advance and investment as well as reduction of waste throughout the supply chain. Consequently, we are able to meet growing needs and appetite for fish products by more responsible and efficient use of the resources available.

It also enables the industry to assist in the accuracy of scientific assessments in fisheries when catch rates and harvest calculations are based on finished product conversion factors.

The EU Market Observatory (EUMOFA) is now publishing trade data and has itself established conversion factors for all CN codes. In the majority of cases these are the same or very closely match those used by AIPCE-CEP and are helping improve the accuracy of official reporting.

4. Consumption and Supply Trends

This report covers the trade activity in fish products for the EU27 up to and including 2013.

Consumption is diverse across these member states driven by long-term tradition and more recent introductions of 'new' species or formats that have opened up the number of occasions when fish is eaten.

Perhaps the key message we deliver in this report is the dependence that the EU market has on imported materials for its markets. Since the formation of EU25/27 in 2006, this dependence as share of the market has been extremely consistent remaining within the range of 63 % +/-1 %. For 2013, we calculate this at 62.9 %.

In absolute terms, the sum of all imports (at WFE) has increased slightly by 79,000 t (0.8 %) to 8.94 million t). This is below the average since 2006 (8.99 million t) but is encouraging for the industry that there is growth again in the EU market.

Traditionally we have used this study to focus on the trade in the seven key whitefish species* that underpin the majority of member state consumer markets. In general, these whitefish species have provided the group of raw materials that undergo the most transformation within EU factories thereby creating employment and value addition.

These seven key species are all wild-caught and have gone through changeable supply scenarios. More recently, the trends of supply have been positive as the precautionary management approaches of several key fisheries has stabilised resources and begun to offer scope for enhanced supplies.

Additionally the utilisation of fish once caught is improving. Greater stability in supply is encouraging investment that has driven technological solutions that improve yields and efficiency so creating more useable products from the raw fish.

Further to this, we have seen the advent of large-scale aquaculture in Finfish species that has introduced and allowed development of new species most notably tilapia and pangasius.

Consequently, the markets have been able to increase the choices and ranges of products on offer and develop new and significant category growth. It is not necessarily the case that the EU has been at the forefront of driving use of all of these farmed species but the importance of the EU markets to global consumption has helped drive standards in farming practice, welfare and science.

Outside of the whitefish sector the continuous development of other categories of fish such as salmon, shellfish and tuna are equally important and has been essential to opening up choice for EU consumer. The EU industry typically represented by organisations such as AIPCE-CEP has grasped these opportunities and ensured these choices are available. We also have recognised our role in making sure that this confers the need to behave responsibly. AIPCE-CEP members have been at the forefront of developing standards that recognise best practice and identify when the pressure of industry and market forces need to be used for bringing change when help is needed.

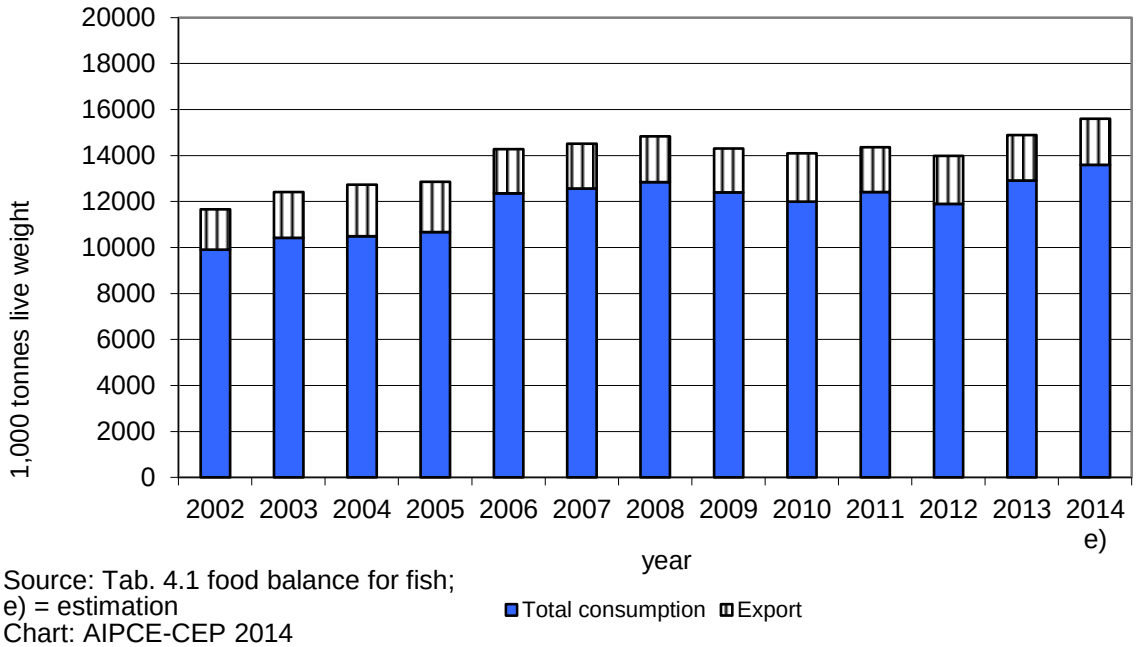
These processes have often involved collaboration with multiple stakeholders and recognition that some issues take considerable time, effort and resources to provide the most effective and long-term resolution that very short-term responses cannot achieve.

**EU species included are cod, haddock, redfish, saithe & hake. Non-EU additions are Alaska-pollock and hoki.*

4.1 Total Fish Supply (all species)

After adjusting the calculations for previous years to reflect the official statistical updates we see a growth in total supply of 234,000 t to a level of 14.2 million t (food use) that recovers about half of the loss seen in last year's figures. This is only the sixth highest number since 2006 (EU27) and slightly below the average of the period since then. What this shows that the market has yet to recover to the volumes seen prior to the economic crisis but the gap is much closed and may become recovered in 2014.

Fig. 4.1 A Actual supply for consumption and export
(from 1997 to 2003 EU (15), 2004-2005 EU (25), from 2006 EU (27))



Source: Tab. 4.1 food balance for fish;
e) = estimation
Chart: AIPCE-CEP 2014

This 14.2 million t of supply is broken down as follows:

- EU national landings of 4.98 million t less 1.02 million t for non-direct food use gives a net 3.97 million t for human consumption representing a modest increase of 92,000 t (2.3 %) since 2012.

- EU aquaculture is estimated to have generated 1.317 million t (+63,000 t) – something that shows the growth for the first time in 4 years by a reasonable 5 % and above the average since 2006.

Therefore, EU domestic supply for food use amounts to 5.28 million t.

Actually quite a large proportion of this material is exported (37 %). For 2013 our estimates show this to amount to 1.98 million t which is down on 2012 by 5 % (-110,000 t).

Imported materials comprised of 8.937 million t an increase of 79,000 t or 0.9 %.

The result of these changes is that we see a net consumption total of 12.243 million t in 2013, which is an increase of 344,000 t, or 2.9 % over 2012 (which was the lowest year of fish consumption we had seen since EU27 formed in 2006).

Against the average of that EU27 period, it is about 100,000 t below. It is also well below the peak year of 2008 by some 600,000 t.

The industry still has work to do to recover consumption levels to recent history and then move on to further growth. Last year's numbers are positive and we hope they signal better things to come. This longer-term recovery will be important for employment and economic prospects and it is essential that unnecessary barriers are not put in the way that could interfere with this recovery and then limit further development opportunities.

4.2 Key Species Categories

We now analyse the breakdown by each of the key category of species to demonstrate the more detailed market dynamics:

- Wild capture whitefish species up 115,500 t (4.0 %)
- Freshwater species (mainly aquaculture) down by 10,800 t (-1.6 %)
- Salmon up by 28,000 t (+2.6 %)
- Surimi base and products up marginally by 2,600 t (1 %)
- Tuna up 70,000 t (+6 %).
- Small pelagics down by 31,000 t (herring and mackerel) (- 2.3 %)
- Shrimp down by 21,400 t (-2.4 %)
- Cephalopods up by 7,000 t (+1.5 %)

In a subsequent chapter there will be greater discussion about each of these.

Altogether these items total to an addition of 160,000 t to the available supply in the EU last year which accounts for 68 % of the total change.

These changes represent the effect to total supply. Our dataset further analyses this to the split between EU caught/grown and import movements.

For EU 'Quota Species' there has been a complete reversal to the previous year's decline as catches improved by 411,000 t (+18 %). Of this, we estimate that 320,000 t is from industrial species (i.e. non-food use) largely because sandeel catch is back to 249,000 t.

The food use part of domestically caught has increased by 92,000 t (+2.3 %), still some way behind its potential but a step in the right direction.

Here the key messages about EU supply show that for the main food use sectors the changes are:

- Wild capture whitefish growth of 1,000 t (+0.3 %)
- Tuna no change
- Small pelagics - herring up 47,000 t (+7 %) but mackerel down up by 19,800 t (-8 %).

4.3 Levels of Sufficiency

Having established that the total supply available of fish for food use in the EU27 was 14.219 million tonnes and that the net consumption was 12.243 million t in 2013 then the levels of reliance and self-sufficiency can be calculated as follows:

If all EU catches were retained in the EU this would represent 37.1 % of the total available supply.

However, we need to adjust this for exports that represent an important element of fish trade. (These are a mixture of products that are more accepted in other markets or in many cases are also more appreciated offering prices that reflect a higher return than is available in the EU27).

After making this adjustment we can calculate that the EU fisheries provide 27 % of the fish consumed in EU27.

The difference is made up from imports and re-stating these figures the other way round it means that imports represent 62.9 % of all available supply and 73 % of consumption.

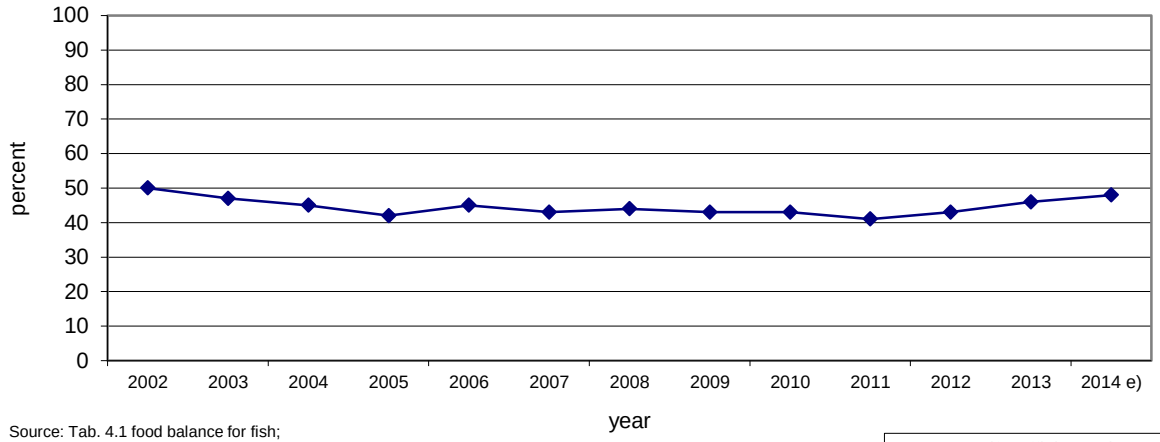
As we have repeatedly stated in the Finfish Study since it was first published (first edition more than 20 years ago) the need for imported materials is fundamental to the industry and the consumer in the EU.

The current figure of 62.9 % has barely changed since the extending the EU to 27 member states in 2006 – operating within a band of only +/- 1 %.

Even if we take the most optimistic calculation for self-sufficiency in the EU and assumed the 1.976 million t of exports were retained and could displace an equal amount of imports the level of self-sufficiency only gets to 43 % against last year's consumption of 12.243 million t (see Fig. 4.1 B).

In later parts of this chapter we will update about the levels of self-sufficiency against key species.

Fig. 4.1 B Changes in EU catch and self sufficiency in relation to third country supply from 2001 to 2003 EU (15), from 2004 EU (25), from 2006 EU (27)



Source: Tab. 4.1 food balance for fish;
e) = estimation.- Chart: AIPCE-CEP 2014

4.4 Consumption

When taken at per capita level (WFE) the total supply appears to have reached 28.3 kg.

Taken to net consumption level this has shown recovery from last year's low point of 23.8 kg and we believe it now to around 24.4 kg. (In our study last year, we felt that the low figure in 2012 could have been an anomaly and our view was that 2013 would be better.)

At 24.4 kg, we are still about 2.5 % below the average since 2006 but our first estimate for 2014 suggests the recovery in demand is accelerating.

4.5 Data Comments

To repeat from earlier our data is based on Eurostat figures for trade flows. Usually the member state submissions are all completed at the time of writing but this is not always the case and we make adjustments to fill in these minor data gaps.

As a final check we take the FAO Statistics and make retrospective corrections for these where appropriate. However, these are not available until 3 years later (this year we are looking back at 2011 data) so we are careful when backdating these and considering anything meaningful in the commentary.

As a consequence of these two review processes we increased the EU catch figures for 2011 and 2012 by 260,000 t and reduced the aquaculture estimate by 6,000 t.

4.6 Wild Captured Whitefish Supply

Completely reversing the situation of 2012, the total supply of wild capture whitefish has increased by 115,666 t to 2.943 million t in 2013, which is the highest we have seen and above average of the last 5 years by 117,000 t (see tables 4.2 and 4.3). The rate of expansion of 4 % is greater than the whole of the fish complex and is particularly important to the EU as the whitefish sector provides a disproportionately higher level of value adding and employment compared to other sectors.

Imports dominate and account for all but 1,200 t of this year's growth. Once again, the share is up to 89 % leaving us with a self-sufficiency of only 11 % from EU27 fisheries.

Last year we tried to explain some of the key factors that in our opinion had caused the shrinkage of supply in 2012. In revisiting these, we can see some of the ebbing and flowing effect we predicted in other markets but more noticeably the impact from quota changes in several key fisheries.

- We have been reporting for a few years that the general trend and catches in global white-fish have been positive and this has helped create additional supply.

  Although we assigned the decline in EU supply in 2012 primarily to the reduction of hake availability out of South America, it appears that about half of this loss has now been recovered in 2013 due to improved availability.

  However, two other EU consumer favourites have been most influential in 2013. Changes to NE Atlantic quotas for cod and haddock have been the drivers for much of the 2013 changes. The largest cod fishery in the world saw a 33 % quota increase on the back of record measurements of biomass levels and the EU has benefited from this. Correspondingly, a 25 % cut in haddock quota for the same region had the opposite effect - we get into more detail about this later.

- Competition from other regions and countries with major populations was quite con-siderable in 2012 and we suggested that in some cases these markets are still to find their feet in whitefish products. Demand is not yet fully established so can ebb and flow according to prevailing economic conditions and the degree of success of new products unproven in the respective markets.

  Perhaps we have seen in 2013 some of this competition easing as economic conditions become tougher or the first wave of product ideas did not succeed.

We also felt that others are reacting to shortages of species they traditionally consume and have explored using whitefish alternatives to plug the gaps. One example is Africa where the lack of Blue Whiting due to substantial quota cuts in 2011/12 resulted in seeking out alternatives for whole round fish of reasonable value and Alaska-pollock did help to fill part of this need.

The fact that wild capture whitefish cannot just be successfully substituted but can compete in these markets reflects the same point above about increasing competition.

In the long term we must be mindful that the expansion of the 'middle class' and the consequent improvement of income and living standard expectations in all such regions and countries will result in increased fish consumption and the competition for fish resources will intensify as the successful products establish themselves in the markets.

- There is another factor potentially contributing to this, which revolves around the strategy many other populous regions and countries are developing towards food security. Converse to last year when we opined that incentives seemed to be in to place to stimulate imports to countries and regions the more recent phenomenon has been the reverse.

  Whilst it is true that some countries are reducing tariff barriers to encourage inward flow there are examples of some populous countries looking to restrain imports. Specifically we have seen this with Nigeria who has introduced limits on imports that is having a negative effect on the export activity of some EU fishermen.

  At the time of writing this report we are in the period of Russia's one-year imposition of a one-year ban of imports of food from several regions including the EU. This has begun to affect several sectors and is a matter we will come back to in next year's study.

- Whilst overt policies seem easy to understand, we must be mindful that the trade in fish is a major global activity. Any increase in the bureaucratic burden for both the supplier country and recipient can quickly result in disruption and change of trade flow.

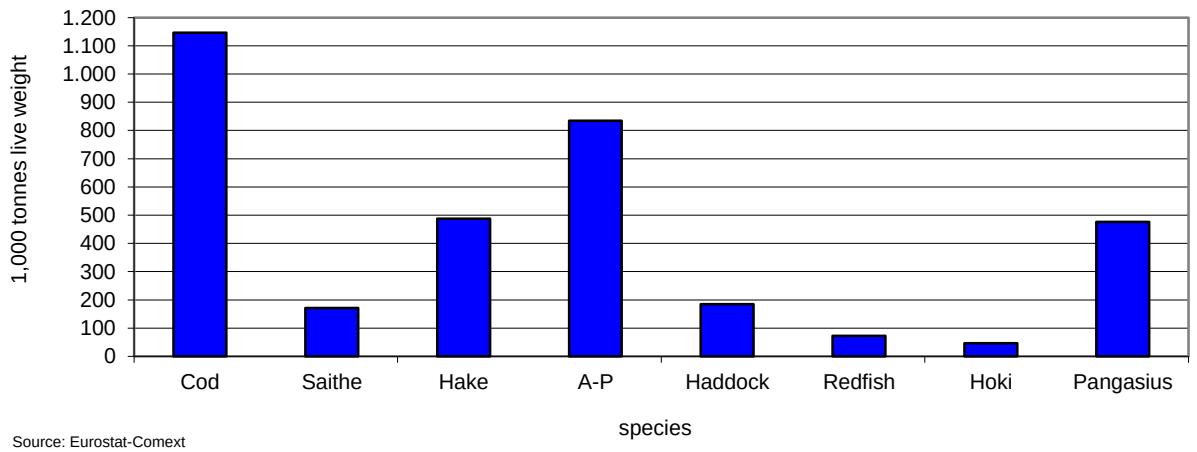
  AIPCE-CEP were pleased to see the adoption of a new EU tariff regulation in 2013 and we believe this has been helpful in encouraging trade and inward investment. We are encouraged that the views of the European processing and trading sector were taken into account and there is recognition of the imbalance of availability in several key species.

The focus of wild capture whitefish is actually on the seven key species that form the vast majority of trade in this category. Most of these are in formats that universally accepted across the EU and are the key raw materials for all scale of industrial processing (e.g. Alaska-pollock blocks, surimi base).

There continues to be a significant skewing of certain species to certain markets based on tradition and preference (e.g. hake in southern Europe) as well as preferred product formats (e.g. salted cod in Portugal).

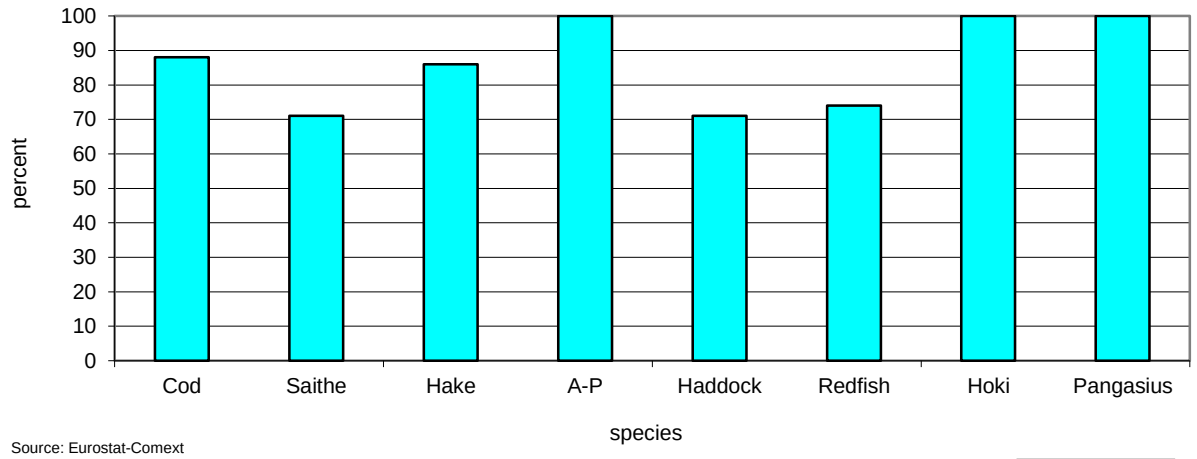
The graph below shows the relative importance of each of these seven wild capture species (at WFE) with the addition of a farmed pangasius (separately discussed later in this chapter). The second graph shows the level of import dependency we have for each species.

Fig. 4.2 A Total volumes utilized by key wild captured whitefish species and pangasius for 2013 EU (27)



Source: Eurostat-Comext
Chart: AIPCE-CEP 2014

Fig. 4.2 B Import dependency by key wild captured whitefish species and pangasius for 2013 EU (27)



Source: Eurostat-Comext
Chart: AIPCE-CEP 2014

Species Commentary:

- **Cod** comfortably retains the No 1 status of preferred whitefish species in the EU and has seen substantial growth this year to 1.146 million t (WFE) up by 13 %!

  It now accounts for 39 % of the consumption of wild capture whitefish in Europe.

  EU catches fell back by 13,000 t (-9 %) which is disappointing and once again reflects the under-utilisation of (increased) available quota that has fallen back to only 67 % compared to 78 % in 2012 and 85 % in 2011.

  Imports thrived growing 173,000 t or 17 % (that growth alone is more than the entire EU catches of the species) largely on the back of the huge 33 % increase in the Barents Sea quota which in itself reflected the highest measure of biomass seen in the ICES time series for cod data.

  With the exception of mince block growth was well into double figures for all product categories.

  For whole fish the fresh supply was up 56 % and frozen 26 %.

  Partially prepared product has also increased but not as dramatically – fresh fillets are up 15 % and frozen fillets 17 %.

  Product prepared for the salted and dried market that accounts for 30 % of the use of cod resources at WFE in the EU grew by 10 %.

  All this suggest good news for the processing sector in the EU as it means more of the transition to consumer formats has been done in the EU and provided added value and employment. (Slightly tempering this may be the consideration that some of growth may be cod being used to offset the decline in haddock volumes (see later) but the net effect is still significantly positive).

  Looking at the split between supply countries it is obvious that with the substantial Barents Sea quota increase Norway and Russia have benefited the most each up 22 % at WFE. However, Iceland is not far behind at 19 % growth.

The mix profile of the product formats is also changed. Norway supplied 66 % more fresh whole fish and 82 % more frozen whole fish than in 2012. Where Norway did not grow much was in supply of frozen fillets (only up 3 %). This reflects the changing profile of the Norwegian catching sector that has replaced at sea filleting capacity with new build vessels that produce H&G frozen more or less year round. The traditional fresh vessels catch around 75-80 % of their quota share in the first four months of the year. In these whole formats the peak supply of fresh in the first 4 months can then be smoothed with frozen for the rest of the year and this has helped fuel EU processing.

Russia has picked up this slack for at sea filleting and this has been a fast growth area for their resource utilisation. In 2013 the frozen fillet volume from Russia to the EU grew by 44 % but the whole frozen by only 13 %.

Iceland continues to specialise in the fresh fillet sector and grew by 23 % yoy although it also saw corresponding growth in frozen fillets that were in part the by-products of the fresh production.

Both Iceland and Norway shared equally 10 % expansion in the salted/dried market.

Last year we commented that China had seen a reversal in volumes for the first time. In 2013 this has gone back to growth but only by a modest 5 %. Given the large increase in quota in the Barents Sea and the corresponding availability of H&G frozen cod which is the staple raw material for processing in China this supports the opinion that cod processing in China has probably peaked.

Whatever way we look at the numbers the importance of cod processing in Europe is still evident. Importing 168,800 t of H&G (WFE) and 61,500 t of fresh whole fish is providing valuable work in Europe and supported by an EU catch of 132,000 t (circa 36 % of the total) represents one of the core seafood materials for our industry.

The reduction to EU landings and the surge in imports results in self-sufficiency in this key species dropping to only 11.5 %.

We do not see this in a negative context as the EU is still the biggest market for the cod species and we estimate accounts for around two thirds of global consumption.

Cod is still well short of average historical catch levels in the EU and there is obviously room for expansion in the EU supply. With the efforts going into long-term management and stock recovery we remain optimistic that this will happen. We should not lose sight of the fact that globally other depleted and pressured cod stocks have been just as challenged and are making substantial and sustained recoveries improving the overall availability of the species dramatically. In the new tariff regulation the AIPCE-CEP requests for maintaining competitive access to imported cod were recognised and we hope this continues. The ATQ allowance for H&G was almost exhausted and the fillet allowance completely used by September.

- **Alaska-pollock** reduced by 2 % the majority of this shrinkage being in mince blocks as fillet products showed virtually no change. Overall, Alaska-pollock remains the second most important species in the whitefish mix and because there is a large volume of the core product (fillet blocks) it is widely used across the European processing industry.

  Russian caught fish dominates the supply into Europe but the majority of it is processed in China before it makes its way to Europe in the form of twice frozen blocks or IQF fillets. This element grew by 2 % and represents close to 50 % of the total utilisation of pollock resource in Europe.

  Specifically though direct imports of blocks from Russia increased markedly in the year by 50 %.

  There are probably several factors behind this change. The eventual awarding of MSC certification at the end of 2012 for the Sea of Okhotsk fishery removed one of the hurdles to entry for some parts of the EU market.

  Perhaps more importantly though was the reduction in the market availability of American products which saw decline of 15 % in fillet blocks and 21 % in mince blocks. None of this switching appears to be related to quota or catching activity as broadly speaking these were stable in both countries.

  It seems to reflect more on the market and the relative price levels between the alternative forms of product formats. Where blocks had been the winner in 2012 for the US after the rebound of the pollock quota in 2011 in 2012 it became more attractive to produce surimi especially as supplies of that commodity were more stretched from other world regions due to resource issues with tropical species. For the Russian fleet and industry this was not an option as they only have nominal capacity for surimi manufacture.

  Based on our calculations and making some allowance for use in surimi (where the CN code does not require the identification of species) we estimate that the EU utilises around 1 million t representing about 30 % of global supply.

  Looking back at the recent history of pollock it is not unusual to see significant swings in where the product is coming from but this has normally been related to quota changes. As a versatile and universally accepted product the scope for use of pollock blocks is global as well and perhaps we have seen some shift to a preference for US produced blocks in their domestic market as the data available suggests the use of Chinese twice frozen blocks has declined in their market being replaced by their own product. This should remind us that despite the EU having been the key market for Alaska-pollock for several decades we cannot take it for granted that this will always be the case as the competition for fish (and protein generally) will intensify.

Alaska-pollock is one of the most abundant fish resources used for human food, is certainly the dominant whitefish at the moment and stating the obvious the EU is 100 % dependent on importing the species. Global catch exceeds 3 million t and supply is very stable with strong scientific and collaborative management in the North Pacific.

Within the new tariff regulation, AIPCE-CEP had been concerned that the removal of the suspension of duty on pollock may have had a negative effect around the long-term supply and use of the species. However, the adoption of a realistic ATQ limit and the introduction of the safeguard measure reassures us that we should be able to have confidence in continuing to see this as a core material for the EU processing industry.

- **Saithe** has made some inroads back into the EU market despite the quota cycle being at low ebb and catches being depressed accordingly.

  When checking the detail of the trade it stands out that the major change is a consequence of increased imports of frozen fillets from Iceland which are up by 14, 000 t (+50 %) still some way below historical levels but suggesting there is an underlying preference for saithe in EU markets.

  Fresh fillet imports fell back to match historical levels of around 7,000 t and it is possible that the extended frozen supply displaced some of this.

  Saithe supply should have been slightly better in 2013 with an increase in Icelandic quota offsetting the reduction in Norway. The EU fishery also had an increase in quota of 15 % and catch utilisation had a very slight improvement to 90 %.

  This left the share of EU catches at 29 % of the market holding onto the more positive trend of recent years. By our estimates, we believe the EU share of global use has increased from 50 % to 55 %.

- **Redfish** is one of the smaller volume species in our whitefish category but it plays an important role in some member states notably Germany.

  Total market volume has begun to climb again after 3 consecutive years of decline and now sits around 72,000 t. EU quotas were reduced by 12 % but catch utilisation has seen a marked improvement to 72 % from a low of 56 % in 2012. Therefore, the EU catch advanced its share of the market to 26 % up from the low point of 23 % in 2012.

  Imports also grew by 4,000 t and now stand at 53,000 t (WFE) but remain well below historic volumes. Catches are also well below historic levels although now appear to be levelling out again with slight increases recorded in both Icelandic waters and Norway. Icelandic supply dominates the EU market with a share of 65 %.

- **Haddock** had a difficult year as the global quota complex moved into a cycle of lower volumes after peaking in 2011/2012. After recording a record year in 2012, the slippage has been 20 % volume with a drop back to 185,000 t (WFE) from 232,000 t.

  This level of volatility is not unusual in haddock and we can expect the decline to continue for 2-3 years if previous experience is repeated. Globally haddock quotas have cycled between 200,000 t and 400,000 t in the ICES time series back to the mid-1940's.

  In individual terms, the greatest quota cut came in the Barents Sea that is the resource shared primarily between Norway and Russia. As it is the biggest individual haddock resource, the 25 % cut to the 2013 quota has had a major impact on global supply.

  The EU has been the largest consumer of haddock products typically at greater than 60 % of global use. However, when we see the lower points of the supply cycle this percentage can actually increase as there is a very loyal core of consumers especially in the UK who are quite elastic in the price they are willing to pay for this favoured species. The only region that matches this is the NE corner of North America where equally devout consumers are found.

  Bucking the trend EU catches improved in 2013 by 1,500 t despite a quota cut of 10 % to 61,300 t. Catch utilisation improved to 88 % well above anything in the data presented previously in the Finfish Study. This has raised the EU catch share to 29 % but given the market has overall suffered shrinkage of 20 % we must continue to be realistic about the importance of imports in this species.

  Analysis of the categories show they are all down but it is the frozen sector that has suffered the most especially whole fish from Norway with decline of 50 % and fillets 52 %.

  As mentioned under the cod analysis we have seen a shift in the profile of the fleet that explains the change to fillets but the underlying loss of EU volume is greater than their quota cut and means the EU share of Norwegian resource has reduced the chasing of haddock by the American market seems the likely explanation.

  Iceland did increase its catches in 2013 and so has managed to slightly increase volumes to the EU in both fresh whole fish and frozen fillets.

  In the tariff regulation review we note that our requests to introduce some concessionary benefits on haddock were turned down. With the significant reduction in global quotas of more than 100,000 t in 2013, the marginal increase in EU catches of 1,500 t whilst extremely welcome hardly made a dent in the lost volume. Maintaining EU competitiveness in attracting this species remains a concern that we hope can be addressed in the future.

- **Hake** has recovered some of the lost ground from 2012 that we had ascribed to lower catches in the South American region. For 2013, total EU supply is up by 26,000 t (6 %) on the back of the rebound in catch rates in the aforementioned region. The frozen fillet sector dominates the share of hake imports and grew 9 % principally from Argentine. However, there are many problems in both the catching and processing sector in that area that have made hake a challenge and it may be that we will see this yo-yoing of activity for one or two more years.

  Fresh whole volume has again declined by 14 % and which we assume is mainly attributable to the continuing tougher economic conditions prevailing in Southern Europe.

  EU domestic catches did better increasing 13 % to 70,000 t taking the share of market to 14 % setting a new high since EU27.

  These are more positive signs than we saw last year that the EU trade has fought back a little. We estimate that of global share we have close to 50 % again.

- **Hoki** (New Zealand only as we do not yet analyse South American supply) turned around and has recovered about half of last year's decline reaching 46,400 t (+9 %). The long-term hold back on the quota for this fishery has finally begun to loosen and we are seeing more supply that is translating into greater activity in Europe. Initially the rate of acceleration did not match the supply, which may be explained by the fishing season being strongest in the mid-year, and maybe the product supply taking longer to adjust.

  The EU remains a key market for all hoki materials and we appear to have levelled out at around one third of the export share out of NZ (if we include the part processed in China but originating in NZ). Of course, hoki is not caught in EU waters so we are 100 % dependent on imported materials.

  The sustainability credentials for NZ hoki are well established and have contributed to hoki establishing itself as a 'name' species in the whitefish complex that has allowed it some differentiation against other species.

- **Plaice** has not been traditionally included by us in our wild capture whitefish set but it is an important species in several EU member states and worthy of mention. It represents one of the few species and formats of wild fish where the EU is close to self-sufficiency.

  Following on last year's growth of 6 % it is very encouraging seeing further positive change of 7 % provided entirely by greater catches in EU waters. The market size has now reached 94,000 t supplied 94 % by these domestic vessels.

  The recovery of biomass in the North Sea has been substantial and we are seeing strong quota development to reach 115,000 t in 2013 making plaice one of the most important food fish in the EU quota species complex.

The market is getting to grips with this extending opportunity but it is not transforming as quickly as the resource is growing. Therefore, last year the catch utilisation was reduced to 76 % but against a quota increase of 15 %.

With this improvement in availability, seeming to be secure in the medium and longer-term, plaice has to re-establish itself in the market and against alternative species that have become available. It may be that these are not all traditional flatfish alternatives but may include some of the cultivated species that have come into the market. Plaice is generally sold in fresh form or as frozen fillets, including added-value varieties. It is not represented in the industrial block sector, which suggests looking at the competitor set in a broader context.

Whitefish Summary:

2013 saw the complete reversal of the 2012 decline in supply of wild capture whitefish to the EU markets with availability reaching 2.944 million t (+4 %) and we anticipate this going above 3 million for 2014.

Probably in 2013 the marked increase in NE Atlantic cod quota, which exceeded 1 million t in the Barents Sea for the first time in several decades, was the major contributory factor. In fact, with the exception of haddock none of the species in our whitefish complex suffered any real setback in either quota or market in 2013.

Disappointingly, EU fisheries have not advanced in volume or share and still represent only 11 % of the wild capture supply. We welcome the ongoing efforts of many EU fishermen to improve this situation. It is our belief they will find buyers willing to support their efforts. We note though that when recovery does come the response is not always instantaneous and markets can take time to adjust to significantly changed availability as the processing capabilities, product development and consumer confidence all have to catch up.

Continued unconstrained access to global whitefish fisheries is essential if the processing industry is to be viable and offer the longer terms opportunity to the EU catching sector.

As we have pointed out before the cumulative EU quota for the seven key whitefish species we measure is less than the individual consumption of any one of the top five species eaten in Europe.

2013 was the first year of application of the new tariff regulation for fish imports and AIPCE-CEP welcomed the dialogue with member state representatives who listened to our concerns and helped us achieve a fair result that recognised the necessity for keeping the EU processing sector competitive not just internally but also on a global stage where other countries and regions have been developing policies to encourage consumption.

However, it also continues to highlight that in several species and product formats where the EU has no self-sufficiency we are still imposing costs and restrictions on availability that may be limiting development of the industry in the EU including investment and employment possibilities.

4.7 Principle Supplying Third Countries for Whitefish

Once again in this Study we provide data that show the countries on which we are reliant for imports.

This is summarised for wild capture whitefish in tab. 4.3 and then detailed in tab. 4.12 and for cultivated fish in tab. 4.13 to 4.16.

Our previous notes have probably explained many of the causes of change but there are also some other factors worthy of mention that help provide additional explanations for trends that may be emerging that can affect supply in the medium and longer term to either the benefit or detriment of the EU industry.

In the last two Finfish Studies we have explained the revolution of the last 10-15 years that has seen the relocation of primary processing away from catching nations to third countries. The advantages of hand-cutting such as yield improvement and multiple choices for product formats have led to the establishment of substantial infrastructure in some of these countries that has in turned fuelled even further switching. Perhaps the most important region has been North Eastern China (Liaoning and Shandong provinces) but smaller hubs have developed in other countries and regions.

It seems more certain now that this trend has slowed if not even gone into reverse. Better technologies are emerging that increasingly capture the benefits of yield improvement and portion control that has been the advantage of hand-cutting.

EU industry's appetite for investing in these developments is growing. The underlying expansion of resources in fisheries in close proximity to the EU is helping further.

Where fish is landed fresh, then supplying the local market is far more effective in both quality and efficiency terms but in EU fisheries it is a common problem that supplies are simply not adequate, consistent or reliable enough to warrant investment. The supplementing of these landings by frozen H&G materials has been pivotal for many years in keeping primary processing viable and now we are seeing the very positive developments in key quotas in several Scandinavian neighbours access to fresh whole fish and H&G frozen has substantially improved adding further scope to this. For some niche markets (e.g. line caught fish) the ability to respond to demanding service requirements is helping support and create further local EU based processing opportunities.

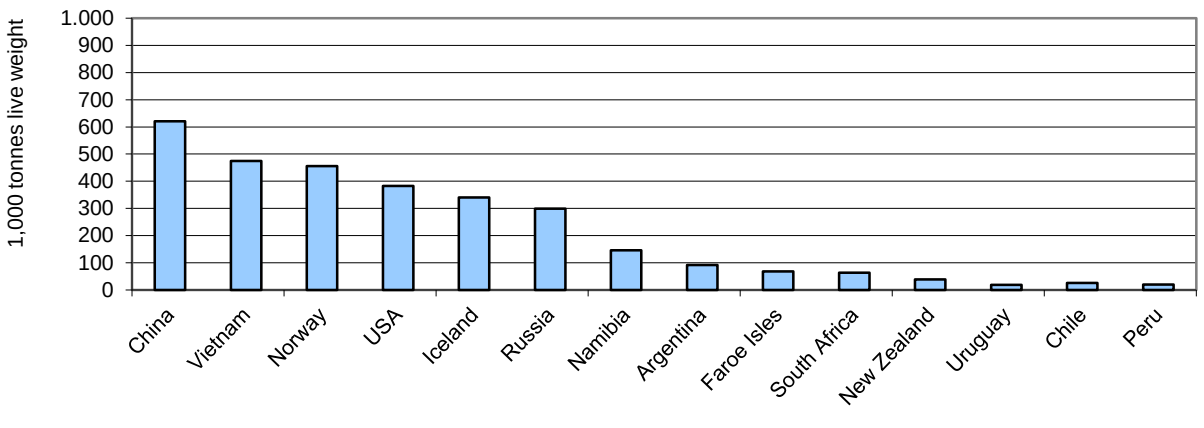
Yield enhancement has been key in supporting the growth of fish and seafood consumption in the EU. Whilst there has been much focus on the management of resources in and on the water, we should not overlook just how much contribution has come from being better at utilising the resources once they are landed. Step changes have taken place here that have seen recoveries improve hugely that have enabled the industry to remain viable, getting more from less and helping to take pressure of resources by reducing waste and profligacy. There is always progress to be made in this arena and AIPCE-CEP encourages every effort to do so.

Our estimates of fish utilised in the market has tried to reflect the most notable of these changes particularly when we identify the country where fish is first processed. Of course we can do this for imported items down to CN code level but unfortunately the code itself is often not adequately detailed to be able to segregate some very basis forms of difference in product formats (e.g. skin on versus skinless) nor does it differentiate when products have additives. We have tried our best to make allowance for these factors but it is inevitable that our calculations are estimates.

Adding more difficulties to understanding this global movement of fish are the statistical formats available to us when we prepare this study which do not always allow tracking of the fish back to country of catch. Be assured that industry itself is very adept at this in the course of day-to-day transactions because of the sophistication of bespoke traceability systems used by individual companies to comply with legislation whilst also providing complete re-assurances to its customers and consumers. However, much of this information is proprietary and is not gathered by any public body for wider access.

Fig. 4.2 C below shows the ranking of each country for whitefish at WFE:

Fig. 4.2 C Volume of wild captured whitefish and pangasius supplied to EU (27) by third countries for 2013



Source: Eurostat-Comext
Chart: AIPCE-CEP 2014

- **China** is still the largest supplying nation but saw 2013 a further decline in share to 24 % with volumes standing still despite the overall market growth (in addition there is around 64,000 t of freshwater whitefish, Tilapia mainly, that comes to the EU).

The wild capture fish originates in third countries and China is a converter. Consequently, the individual species activity reflects the availability levels according to quota and catch in the supplying nations. Within the whitefish complex, it is not surprising to see the China has grown in cod (but only by 5 %) and shrunk in haddock (by 27 %).

Alaska-pollock remains by far the dominant species and grew by 1 %.

The challenges of operating in China have not diminished and the advantages associated with manual processing are being narrowed as technology advances to close the gap. This is resulting in some simple primary processing coming back closer geographically to the origin of the fish.

- **Vietnam** continues to struggle with pangasius sales into the EU and saw 2013 further slippage of 3 % (volume) but at least this represents a slowdown in the negative trend of the past 3 years.

EU share of Vietnamese sales is now below 20 %.

- **Norway** had a productive year in 2013 with whitefish volumes up by 10 % at WFE. The principle reason is reflection of the 33 % increase in cod quota which forms the largest share of Norwegian whitefish trade.

Cod actually only grew by 22 % because much of the landings happened in the last two weeks of the year and did not come into the market until 2014.

Haddock fell back in line with the 25 % quota cut and saithe matched the previous year.

Once again a key feature of the trend in supply from Norway is the move away from part processed products into more basic raw material formats. Fresh whole and frozen H&G grew hugely but filleted products – both fresh and frozen – stayed constant. Of the more processed products salted/dried showed double-digit growth in cod but fell behind the increased availability.

All in all this means that EU based operations have benefited from increased access and procurement of the basic formats of raw materials and gained additional processing value.

Across all key finfish sectors, Norway retains its status as the major trading partner for the EU. Salmon sales did not grow at the stellar rate of 2012 but were still very strong.

- **Iceland** increased by 10 % at WFE reflecting changes in cod (+19 %), saithe (+45 %) and haddock (-5 %).

For cod the growth came in all sectors whereas the other species had more mixed results.

Iceland's role as a key finfish trading partner for the EU consolidates as its fisheries recover through the application and enforcement of stricter harvest control rules.

- **USA** declined by 15 % in whitefish WFE principally because of the Alaska-pollock reductions explained in the earlier chapter.

Pacific cod also saw a minor reduction of 5 % and this species is now being affected by stiff competition from Atlantic cod that has much greater abundance.

Productus hake also reduced in block form despite a modest increase in quota on the western seaboard. This is likely caused by the more extended allocation of the species into H&G formats in 2013 rather than an underlying issue with EU trade in the species.

Conversely Surimi base produced from Alaska-pollock grew by 36 % in 2013. This reflects the challenge to tropical surimi supplies during the last couple of years and the ability of a consistent material like AP surimi to fill that gap very comfortably.

- **Russia** further built on the growth from 2012 and saw whitefish WFE expand by 11 % in 2013 to just under 300,000 t.

2013 was unaffected by the trade sanctions that have been introduced in 2014.

So focusing on the 2013 changes we can see that the development of Atlantic cod quota in the Barents Sea has expanded volume by 22 % but unlike the Norwegian growth, the major volume growth has been in semi-prepared products such as frozen fillets. The changing profile of the fleet sector in Russia towards greater at-sea-processing is the key driver.

The reduced quota for haddock of 25 % is directly reflected in the activity for that species.

For the Pacific side of supply there is a major upward change to volume with blocks/fillets up by 50 % in Alaska-pollock as discussed in an earlier chapter.

Our contention in previous studies is that Russia has been shifting towards greater internal consumption of the species it catches and the evidence continues to point to this.

However, the improvement in Barents Sea cod supply has resulted in more exporting but only at a pace of increase that matches the supply growth. That same rate is being mirrored by internal consumption growth.

- **Other regions** in general have improved the performance in share of EU supply. Hake in particular has recovered from the low point of 2012 led by South American countries with the Southern African region holding stable.

New Zealand Hoki is steadily re-asserting itself and grew by 16 % last year.

4.8 Importance of Semi-Prepared Whitefish Imports

In our definition, these are fish materials that have been through a primary processing stage such as filleting but are then used as a raw material for added value in the EU processing sector. The most important of these are:

- Industrial blocks used for a wide range of consumer items such as fish sticks;
- Fresh fillets that go for portioning and packing in consumer units;
- Dried and salted whitefish.

As can be seen from Fig. 4.2 D these semi-prepared whitefish products represent 2.21 million t of the imported volumes (84 %) with volume up by 4 % since 2012. As this is such a dominant share, it slightly disguises the fact that for the unprocessed category - whole fresh and H&G frozen - there is actually stronger growth of 8 %. As mentioned in the previous section this means more primary processing is taking place in the EU.

Briefly below we try to explain some of the reasons for the changes:

Fig. 4.2 D An analysis of the volume of unprocessed and processed important whitefish species imported into EU from third countries for 2013 (tonnes live weight)

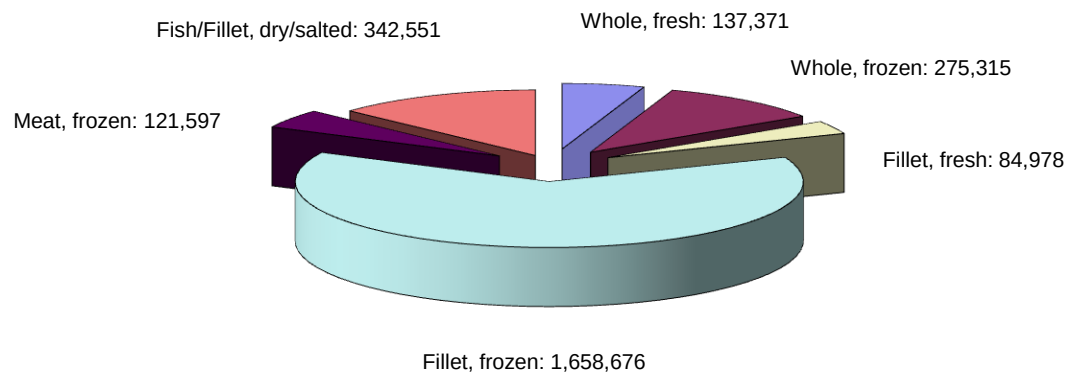


Chart: AIPCE-CEP

- Whole fresh has quite noticeably reversed a long-term trend for reducing imports to an increase of 14 %. No doubt, a key driver of this has been the huge increase in Atlantic cod quota which improved the competitiveness of pricing in Europe. Whilst it is still true that catching nations would like to increase their share of the primary stage of processing - which is usually the least labour intensive and easy to manage - in their domestic economy, their ability to do this may now be reaching limits in the North Atlantic – in economic, logistics and human resource terms.

- Supporting the above argument is the continued growth in fresh fillet imports of 7 % to 85,000 t WFE that is strong but outpaced by the whole fish.

  Investment by logistics companies has resulted in improvements to frequency and reliability of services to major EU fresh fish markets that allows this fish to reach the retail chain in peak condition and with maximum shelf-life duration.

- Whole frozen too has increased by 5 % consolidating a similar trend as we see in whole fresh. Cod has been the key species behind this change and is obviously following the resource developments. However, the shift of the Norwegian and Faroes fleets to simpler H&G production rather than at-sea-filleting is probably assisting this activity as the material is easier to access and also less seasonal than fresh fish allowing more stable year round production.

  This is particularly important as scaling is now a factor that can be more reliably achieved in whitefish processing thereby encouraging investment and further stimulating the opportunity. Future recovery in the EU domestic landings will benefit from adding further security to this.

  Haddock quota reductions have inhibited this development for 2013 but do not prevent the same expansion in the future.

  Hake landings in the EU improved by 13 % in 2013 and even though imports of whole fish (fresh and frozen) fell the overall was a net increase to primary processing.

- The frozen fillet format represents the most important for the European processing sector as this includes industrial blocks which for many factories in Northern Europe form the backbone of their operations.

  Volumes expanded 4 % in 2013 to 1.658 million t. Part of this is the reversal of the troubles mentioned last year for the NE Atlantic and hake from South America where catch rates have improved as the fisheries have stabilised once again.

For the key species Alaska-pollock there has been no change (except for the swop between nations supplying) in fillet blocks but there has been a sharp reduction in mince imports of 19 %. This could be because an alternative market has been found for the mince or more likely that the overall availability has been reduced as the material has been diverted to other uses such as surimi by the catching nation.

Cod as would be expected following the quota increases has grown by 17 % in the fillet/block sector. Two developments stand out that have supported this – the increased availability of Shatterpack fillets from Russian vessels as they re-shape their fleet capabilities and secondly a sharp acceleration by Iceland for frozen fillet products derived from the by-products of fresh fish sales.

- Salted and dried products went up by 10 % to 342,500 t made up entirely of cod. This is a very strong performance and shows real resilience even in the face of tough economic conditions in the Southern European markets that dominate in this trade. The repeatedly mentioned increase in cod quota and catches has certainly opened the door to this opportunity but even for such a mature and established industry sector it is still a remarkable performance.

- Freshwater species saw a big volume reduction in 2012 and again in 2013 we see further contraction, albeit at a much slower rate of decline. Outside of pangasius that is principally imported in IQF format the rest of the freshwater complex is very localised depending on the species.

4.9 Total Supply of Surimi Base

Surimi base was stable year on year but with a notable shift away from tropical species ex Asia into Alaska-pollock and hake. Such volatility between sources is not unusual but it probably reached a new extreme in 2013.

EU production of surimi base is very small – we estimate less than 4,000 t - all of which comes out the Northern Blue Whiting fishery. This represents less than 10 % of the overall supply and current capacity is a limitation to future growth regardless of quota availability.

However, there are some very significant secondary processing operations in the EU that use surimi base as their raw material and in recent years there has been considerable consolidation in the sector. The largest consumer markets are France, Spain and Italy but surimi products can be found throughout EU member states.

The share of imported finished products has been in a decline for several years and this trend continued in 2013 with ready products reducing by around 6 %.

EU based processors have become very expert in product innovation and creating diverse uses for this very flexible fish product and this has enabled some large scale operations to be developed. Most product formats are sold chilled and servicing this sector has become a strength of these businesses that is very challenging for importers to match.

4.10 Total Supply of Freshwater Fish

We have already commented on some of the changes that have happened in this sector but below are the cumulative impacts across all the species.

The overall supply of freshwater whitefish at WFE is down again but the pace of decline has slowed markedly. In total the species accumulate to 665,000 t compared to 676,000 t in 2012, a minor fall of 1.6 %. (Note: Within this, we have re-stated 2012 figures for Tilapia that were previously under-estimated). These are our more detailed comments:

- Pangasius has almost stopped its recent declines.

  The EU accounts for around 19 % of the global market for pangasius, which is very slightly down on 2012 but well away from historical peaks that got close to 40 %.

  It is not easy to identify what, if anything, has replaced this loss of sales. The dominant format for IQF suggests it unlikely that block based formats are the contenders.

  Pangasius has not had universal acceptance across EU member states but remains an important item in those that have adopted its use.

  From January 2015 new regulatory requirements are to be imposed by the Vietnamese authorities regarding moisture levels and glazing that should provide more consistency to the standard of product on offer.

- Nile Perch had a reversal of the 2012 growth and fell back by 12 %. Tilapia kept increasing with China dominant but the EU is for now a minor player in the global context of this species accounting for less than 2 %.

5. Import Supply Trends of Non-Whitefish Species

As said in our introduction to this report we have historically focused on whitefish species in the Finfish Study because these have provided the principal raw material base for members of AIPCE-CEP. However, the competitor set for fish is much broader and with ever improving access and choice available the consumer has never had so many options to be able to interchange between species.

Wild caught fish is still the dominant source for consumption, particularly when considering the abundance of pelagic species.

For large pelagics (such as tuna) the relationship between the EU and the regions of catch is complex. Directly it provides substantial employment and fishing activity for EU vessels and processors but in addition the involvement of EU businesses has helped support activities in a diverse set of locations outside of the EU borders.

For smaller pelagics such as herring and mackerel these form large parts of the tonnages caught in the EU but here there are also changes in the fisheries that are having considerable effects on the stocks and areas of catch.

Perhaps the greatest changes to finfish supply for non-whitefish species has been the global development of substantial aquaculture operations that now have established core markets for certain species some of which have become key to the EU and are underpinning considerable investments across the EU.

In finfish the most important of these is farmed Atlantic salmon. Whilst the EU has several important salmon farming operators and locations the biggest proportion is imported with Norway dominant.

Beyond finfish the success of aquaculture is also very important in Shellfish. Specifically the development in supply of warm water prawns (Penaeus spp.) has been instrumental in creating an important supply that is now well recognised in many EU member states and has encouraged significant investment and employment to add value in multiple ways – from cooking to complex meal solutions.

Additionally molluscs such as mussels have been successfully added to the EU repertoire and created considerable value in both growing and processing.

This whole category of shellfish along with cephalopods has been very substantial across the EU for many years but is dominated by imported product.

5.1 Total Supply of Salmon (Farmed and Wild)

The rise of salmon, especially farmed Atlantic salmon continued in 2013 but at a modest 3 %. Using our measure for calculating this to WFE, we estimate the total to now exceed 1.1 million t. Given we are using estimates for conversion factors it will always be contentious which fish species comes out with the greatest volume but there is no denying salmon is in the top 3 and vies with cod and tuna for the most consumed finfish species in the EU when considered at harvested weight.

By far the vast majority of salmon is sold in chilled distribution and has become they key category driver for that sector of the retail and food service trade across Europe.

The biggest contributor to imports is Norway with 75 % share but this is slightly down on the previous year. The largest sector of growth was frozen fillets and the re-emergence of Chilean salmon created the major impact with their volume almost doubling in the year – though this level is still well below the peaks achieved prior to the challenges faced by the Chilean sector several years ago. The Faroes also saw double digit growth in the supply of frozen fillets.

Wild salmon recovered some of the lost ground particularly in whole frozen format where its share is above 50 %.

Alaska harvests were generally good especially for Pinks and this enabled wild salmon to retain a competitive price setting against the farmed species. However, the short season for harvesting wild salmon means the full impact of the supply changes does not really hit the European market until several months later and it will be the figures for 2014 that give us a clearer picture.

Fig. 5.1 A An analysis of the volume (1,000 tonnes) of unprocessed and processed salmon imported into EU from third countries for 2013

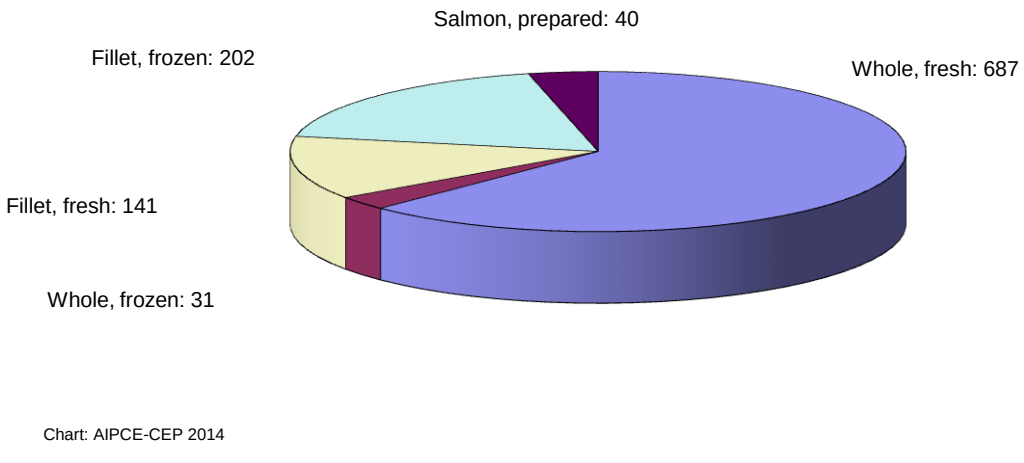


Chart: AIPCE-CEP 2014

Fig. 5.1 B An analysis of the volume (tonnes) of frozen salmon fillet import by country into EU for 2013

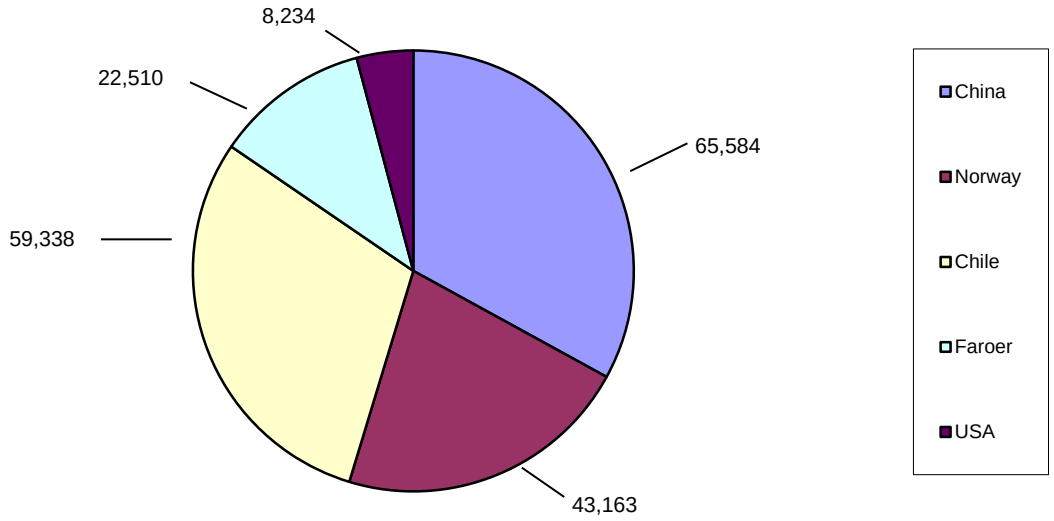


Chart: AIPCE-CEP 2014

5.2 Total Supply of Tuna

After adjusting the conversion factor last year for canned tuna we brought the WFE measure down to a more accurate level which shows tuna species to be the highest aggregate finfish imported item into the EU at around 1.2 million t. For 2013 this figure grew by 6 % fuelled by the 'prepared' sector – mainly canned – especially from Ecuador and Thailand. These same countries also saw similar rates of growth in their supply of loins that serve as the core product for the EU canning industry.

The processing of tuna on Community territory today is an important economic activity, producing around 340.000 tons of canned tuna annually. There are more than a hundred establishments that process tuna in the EU.

The EU tuna processing industry is the world's second largest producer of canned tuna and processed tuna products and has built sufficient capacity to meet the demand for canned tuna on the EU market. Today it is supplying about half of the demand.

The industry is characterised by its important social and economic contribution, generating stable employment in coastal areas which are traditionally highly dependent on fisheries. To put this into context the EU tuna processing industry represents more than 25,000 direct employments in the EU and when taking into account the indirect employment the number is probably three times as great.

It is committed to the principles of corporate responsibility in the social, environmental and economic domains.

Furthermore, this sector is highly internationalised – actively exporting and sourcing globally and locally.

Investment levels are considerable and the industry is constantly innovating.

Ensuring an adequate supply of raw material for the EU tuna processing industry is key to sustaining this. Imports in the form of tuna loins are paramount to maintaining the necessary volume and resource to ensure this continues.

5.3 Total Supply of Herring and Mackerel

Small pelagics are recent additions to our statistics pack but the volumes attached to them are very significant as they represent considerable tonnages of live weight fish.

EU catches provide a considerably higher proportion of the supply and self-sufficiency in the two major species categories of herring and mackerel is upwards of 70 %. The EU consumer is familiar with the health benefits associated with eating these species alongside whitefish but it remains the case that small pelagics have been the key volume driver of export activity from the EU fisheries.

In recent times this picture has become very complex as the geographical distribution of the fishing stocks appears to have been changing with a drift northwards for mackerel especially. Whilst the resource appears to be abundant, the longer-term effects of this change remain uncertain.

Coupled with this events in 2014 have undermined the core export markets for the species and bring a completely new set of challenges.

Some of this appears to be being offset by greater internal market use of the EU catches – imports have been shrinking.

The 2013 EU quota was increased by 5 % for herring and utilisation improved to 86.9 % (from 85.3 % in 2012) although this is not uniform across all fishing regions.

For mackerel we estimate that the quota was reduced by 14 % but utilisation improved to 68.7 %.

5.4 Total Supply of Shrimp/Prawns

This is only the second year we have included any data about the shrimp trade flows in the EU but it does represent an important sector that we calculate accounts for nearly 900,000 t at live weight equivalent.

Our calculations suggest the market has reduced by 2 % in 2013.

This continues a trend that began in 2012 with many of the growing regions for warm water species badly affected by disease outbreaks.

Inevitably, price was driven up sharply by supply shortages and this compounded the demand reduction.

Coldwater prawns (which are wild caught) have also been suffering supply issues as the resources come into a cyclical low although in 2013 Canada was able to make up much of the gap created in Greenland and Iceland.

5.5 Total Supply of Cephalopods

The overall market across this species complex has been quite stable with a modest 1 % growth.

6. EU Supply Base

6.1 Overview of EU Fish Stocks

When we prepare this study the ICES advice has been made available and due to the delay in publishing the 2013 study we have also been able to see the final agreements nearer completion. The advice prepared for 2015 fisheries is in the context of the revised CFP and there are many other places were the impacts are being discussed so we will not go further into these in this edition of our study.

The advice can be found at the ICES website www.ices.dk.

Continuing the focus that this study has towards whitefish species below we comment on the EU fisheries in the context of our supplies. Inevitably there is no constancy when discussing activity in wild fisheries but we are optimistic that the long-term intent to improve EU fisheries can be matched to market opportunities by the fishing and processing sector working together to develop these.

6.1.1 EU Quota by Species

Of the seven main species we have extended commentary about in chapter 4 five are subject to EU quotas (the exceptions being hoki and Alaska-pollock). To these we can add Atlantic pollock and whiting as these form part of the EU whitefish fishery and play a role in the effect of managing a mixed fishery complex.

EU quotas include shares under agreements with RFMOs such as NAFO and NEAFC as well as sharing agreements in the Barents Sea under third country arrangements with Norway and Russia.

Betweeen 2012 and 2013 this grouping of quotas saw a cumulative increase of 5.5 % to 497,500 t. Within this cod was up 11,000 t (+5.9 %), haddock down by 6,000 t (-9 %), saithe up 6,500 t (+12 %), whiting up 6,700 t (+16 %) and the others up by 6.5 % (extracted from Tab. 6.1).

The cumulative total of just under half a million tonnes still represents only a minority of potential supply to the EU market for whitefish but the role these fisheries have played in providing a base for local processing and supply has been critical in the long-term history of the EU industry.

Our summary in this chapter does not change from the message of previous years:

a. **The EU processing industry for whitefish must rely on imports to be able to meet the demand for these products.**

b. **The scope for the EU fishermen to increase share in the market is considerable as is their opportunity to contribute to its expansion.**

6.1.2 EU Catches by Quota Species

Once again we have used our best estimates of the reported catches to calculate the utilisation of EU quotas for year 2013. (The official submissions for each member state are generally accurate but there are adjustments to make retrospectively for up to 3 years. As some activity is in non-EU waters this can complicate matters).

Quota represents the total allowable catch and fishing, in theory at least, is intended to fully utilise that availability. However, within the EU regions many species are caught simultaneously in so-called mixed fisheries, something especially true of the whitefish species. Consequently, the targeting of individual fish type is nearly always influenced by the impact on others. This results in less than optimum utilisation of most species. (The progressive implementation of the discard ban in the reformed CFP may improve the utilisation but not necessarily the marketability of the fish).

Taking the statistics available we estimate that the grouping we outline above increased total landings by 1 % to 360,000 t. This left 27.5 % of the quota as not landed - which is further deterioration over previous years. Cod was only taken at 2/3rds of quota, most notably with very poor utilisation in the Baltic (both West and East zones). Haddock catches actually increased against a lower quota so improving utilisation to 87.5 %.

Hopefully as a result of the regulatory and management review this type of issue can be addressed in the longer term and enable the potential of EU fisheries to be more properly met. This will need a collaborative effort by all stakeholders over several years.

6.2 Overview of selected Fish Quotas in the World

Being reliant on imports for 89 % of our whitefish supply we are of course very interested in what is happening to quotas in other parts of the world. We include Tab. 6.3 to give an overview of some of the key fisheries we rely on and their relative performance. Where we can we use official data from the websites of the respective fishery managers but if these are elusive then AIPCE-CEP members will provide credible estimates from their commercial contacts.

Establishing quota levels in all these fisheries is based on scientific advice and review and increasingly the extent of other stakeholders' inputs is expanding.

Quotas are not constant and go up and down depending according to changes in many factors of which fishing activity is only one.

Wild capture fisheries are subject to natural variation that comes from recruitment fluctuation, changing environmental conditions, weather and host of influences well beyond human control. Management regimes have become more precautionary around the world frequently as a response to market pressures that require overt demonstration of responsible and sustainable practices. Such market pressures are by no means unique to the EU.

We have discussed some of these global quota changes in our earlier commentary but here is a summary of the key trends:

- The Barents Sea cod and haddock measure of spawning stock biomass for cod and haddock reached a peak for the time series of ICES records.

- Iceland has also been seeing increases in the biomass for cod for several years and it is now at a 50 year high.

- The managers of both these key regions have introduced much more conservative fishing mortaility targets (F) that should enable the recovery in resources to be maintained at higher levels than historically. (That does not mean quotas will not come down. Currently the natural cyclical behaviour of saithe and haddock is resulting in less fishing opportunity but the underlying biomass remains strong).

- USA Alaska-pollock went up slightly (4 %) in 2013 and further in 2014 (+5 %) but is around the top of the quota cycle with a cap to cumulative groundfish activity in the Bering Sea now limiting any upside. The other key Alaska fishery is stable with Pacific cod holding around 320,000 t.

- Russian pollock quotas edged up in 2013 primarily in the Sea of Okhutsk. Catch rates have not fully matched this increased quota especially in the West Bering Sea.

- New Zealand has been very cautious about increasing the hoki quota despite encouraging signs from the science. However, there has been some relenting of this reticence and the quota has now eased up to 160,000 t.

- Hake across the South Atlantic have had mixed performance. In Southern Africa there are some downward pressures but this does appear to be levelling out again.

- South American hake remain volatile but supply did improve in 2013.

These fisheries are the key areas for supplying the EU whitefish processing industry. They have been able to demonstrate leadership in providing fish that is safe, sustainable and compliant with all the regulatory and market demands.

Competition for the products of these fishery resources is constantly challenging and seems to be intensifying. How fish is valued is changing and with it the formats in which it is brought to the market will adjust.

7. National Prices versus Import Prices

It is difficult for AIPCE-CEP to carry out any careful analysis of pricing as the availability of public data is somewhat limited and when available is often presented in differing ways making comparison misleading.

This becomes even more complex when trying to compare prices for imported products against local supplies as there are few common presentational formats that stand up. For example industrial blocks are a key material for the frozen processing industry but very few of these are now processed in the EU because we lack the concentration of fish landings to warrant block production.

Similarly most fish landed in the EU is in a fresh state so it should be able to service this market advantageously over imported fish because of the quicker supply time.

Below we present the data used in previous publication of this study updated for 2013 figures.

Our conclusion remains the same in that we believe the reliance on imports does not undermine the value of domestically landed fish and that a viable processing sector that invests in both production facilities and the market is essential to providing routes to the consumer for all fish products.

It is important that access to fish is kept as open as possible to maintain consumer interest and attention and allowing the economic benefits of EU processing and catching to be in harmony.

Fig. 7 A Prices (€/kg) for cod, whole, fresh (h/g) in Germany

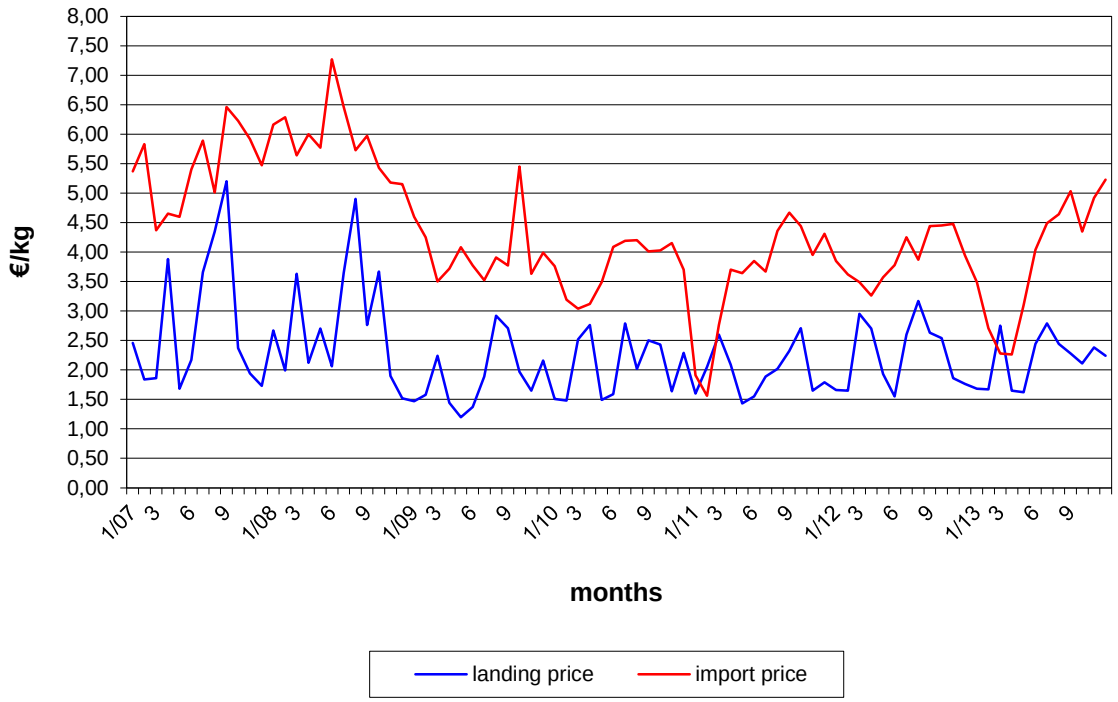


Fig. 7 B EU import average prices (€/kg) for frozen fish fillets

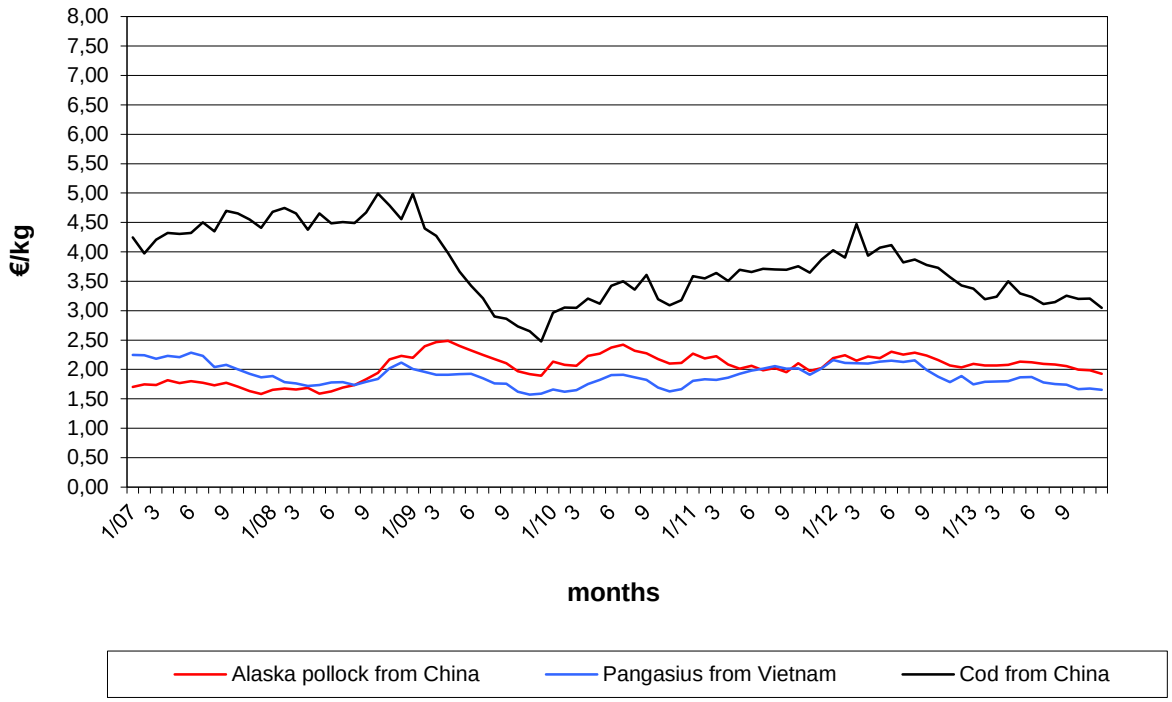
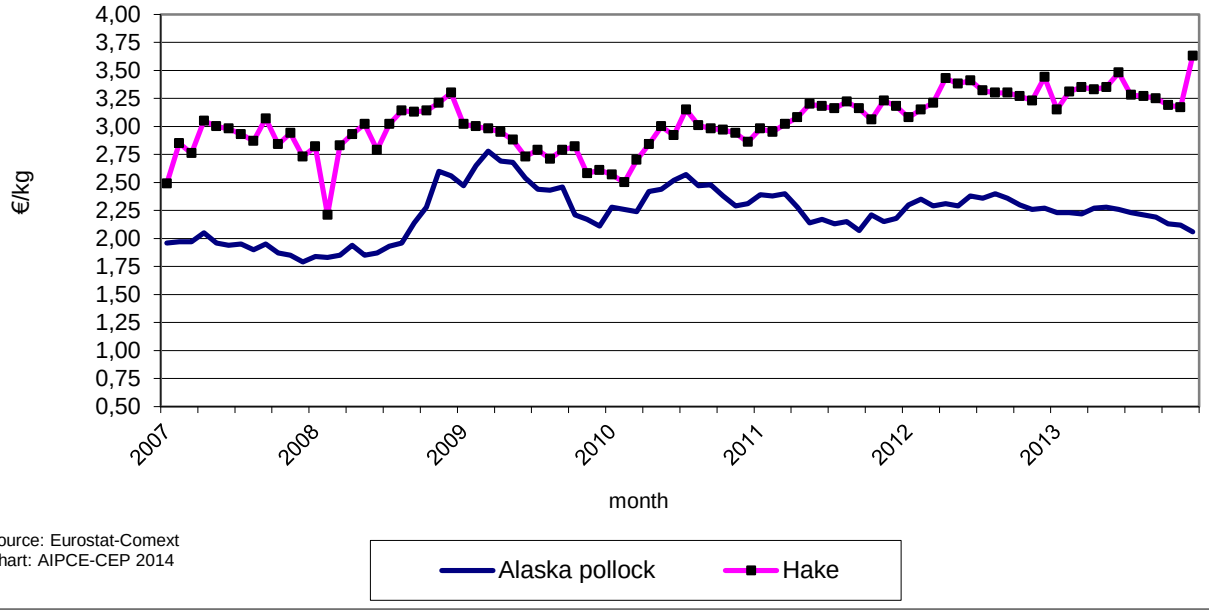


Fig. 7 C Development of EU import prices of frozen fillets of Alaska pollock and hake from third countries



Source: Eurostat-Comext
Chart: AIPCE-CEP 2014

8. In Conclusion

This AIPCE-CEP study is compiled for the benefit and use of AIPCE-CEP members and to help others understand the activities of the organisation AIPCE-CEP.

AIPCE-CEP is not liable for any errors in the accuracy of the data or in its representation.

The current regulatory review process in the EU has finally come to its conclusion and only now we are beginning to be able to assess the impact of the many changes.

There are still several circumstances in which the application of the regulation remains uncertain or unproven and we will come back to this in future studies.

The study has been published for more than 20 years and provides insight into the changes that have occurred to the seafood market during that time. We remain confident in AIPCE-CEP that the fish and seafood market across the EU can support a successful and vibrant industry. Imports remain the more prominent part of supply but the opportunity for EU fisheries is substantial. We will continue to work on developing the use of resources from around the globe that are safe, sustainable and properly regulated.

AIPCE-CEP would welcome comments and suggestions about additional topics the reader wishes to see covered in further detail (AIPCE-CEP@agep.eu). There are also further publications and commentaries at our website: www.AIPCE-CEP.org.

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Tab. 4.1 Food balance for fish and fishery products

1,000 tonnes live weight

	EU (15)		EU (25)		EU (27)								
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014 a)
Catches b)	7.922	7.536	7.230	6.905	5.200	5.136	5.216	5.068	4.944	4.889	4.573	4.985	5.200
+ Aquaculture production	-	-	-	-	1.336	1.308	1.373	1.302	1.260	1.254	1.254	1.317	1.383
- Non-food uses b)	3.000	2.600	2.500	2.400	1.000	1.000	1.000	1.000	1.000	1.000	700	1.020	1.050
= Supply for consumption	4.922	4.936	4.730	4.505	5.536	5.444	5.589	5.370	5.204	5.143	5.127	5.282	5.533
+ Imports (Third countries) c)	6.735	7.477	7.993	8.355	8.741	9.061	9.247	8.928	8.894	9.221	8.858	8.937	9.116
= Total supply	11.657	12.413	12.723	12.860	14.277	14.505	14.836	14.298	14.098	14.364	13.985	14.219	14.649
- Exports (Third countries) c)	1.752	1.995	2.239	2.196	1.925	1.944	1.994	1.905	2.104	1.951	2.086	1.976	1.996
= Total consumption	9.905	10.418	10.484	10.664	12.352	12.561	12.842	12.393	11.994	12.413	11.899	12.243	12.653
Total supply (kg/caput) d)	31	32	28	28	29	29	30	29	28	29	28	28	29
by catches for consumption in %	42	40	37	35	39	38	38	38	37	36	37	37	38
by third countries imports in %	58	60	63	65	61	62	62	62	63	64	63	63	62
Supply for consumption (kg/caput) e)	26,0	27,2	22,8	23,1	26,6	25,4	25,9	24,9	24,0	24,8	23,8	24,4	25,2
Self-sufficiency (%) f)	50	47	45	42	45	43	44	43	43	41	43	43	44

Notes: a) Estimation.- b) Incl. Aquaculture production until 2005.- c) Without fishmeal (feed) and fishoil, product weight converted into live weight. Data from 2006 to 2014 are calculated with conversion rates of the year 2013.- d) Total supply / EU-population * 1000 = kg/caput/year.- e) Supply for consumption / EU-population * 1000.- f) Total consumption / supply for consumption*100 = Rate of self-sufficiency in %.-

Source: FAO, Eurostat-Comext, EU catch report, estimations

Published by: AIPCE 2014

Tab. 4.2 Results of the tables "Origin of imports of important wild captured whitefish into EU from third countries"

calculated on the basis of tonnes live weight

Species	Catches of quoted species					Third countries imports					Total supply (catches + import)				
	1000 tonnes					1000 tonnes					1000 tonnes				
Year	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
Total a)	298	317	320	322	324	2.446	2.454	2.613	2.506	2.619	2.744	2.771	2.933	2.828	2.943
Cod	126	138	139	145	132	799	823	873	869	1.014	925	961	1.012	1.014	1.146
Saithe	53	52	54	48	49	191	168	132	115	122	244	220	186	163	171
Hake	49	55	61	62	70	468	471	468	400	418	517	526	529	462	488
Alaska-Pollock	-	-	-	-	-	719	724	854	850	835	719	724	854	850	835
Haddock	50	47	46	52	54	164	166	176	180	131	214	213	222	232	185
A. Redfish	20	25	20	15	19	75	61	60	50	53	95	86	80	65	72
Hoki	-	-	-	-	-	30	41	50	42	46	30	41	50	42	46
Plaice b)	65	75	77	82	88	7	6	6	6	6	72	81	83	88	94

	Total supply:										Third countries imports:				
Species	by catches					by third countries imports					by imports from China				
	(%)					(%)					(%)				
Year	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
Total a)	11	11	11	11	11	89	89	89	89	89	21	22	23	25	24
Cod	14	14	14	14	12	86	86	86	86	88	14	16	18	16	14
Saithe	22	24	29	29	29	78	76	71	71	71	11	13	18	16	14
Hake	9	10	12	13	14	91	90	88	87	86	1	2	2	2	2
Alaska-Pollock	-	-	-	-	-	100	100	100	100	100	55	54	50	47	48
Haddock	23	22	21	22	29	77	78	79	78	71	18	20	21	20	20
A. Redfish	21	29	25	23	26	79	71	75	77	74	21	25	20	18	19
Hoki	-	-	-	-	-	100	100	100	100	100	37	32	24	23	20
Plaice b)	90	93	93	93	94	10	7	7	7	6	11	9	5	1	0

Notes: a) Total of the 7 listed species without plaice.- b) Listed for reason of comparison.-

Source: Eurostat-Comext; EU catch report.-
Published by: AIPCE 2014

Tab. 4.3 Origin of imports into EU from third countries for important wild captured white fish species a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**141.570**	**132.823**	**120.226**	**137.371**	**100**	**14**
of it from Norway	69.324	71.391	68.004	90.065	66	32
Iceland	28.131	22.641	22.029	20.715	15	-6
Faroe Islands	11.419	7.241	4.433	4.706	3	6
Russia	807	952	557	69	0	-
South Africa	12.069	11.316	8.273	5.346	4	-35
Namibia	4.089	4.843	4.564	5.550	4	22
Whole, frozen	**250.736**	**260.829**	**261.048**	**275.315**	**100**	**5**
of it from Norway	71.126	80.781	84.600	94.921	34	12
Iceland	13.196	13.871	11.655	12.232	4	5
Faroe Islands	1.559	1.381	1.381	2.163	1	57
Russia	49.040	55.290	57.842	61.376	22	6
South Africa	14.552	17.555	19.334	20.006	7	3
Argentina	16.870	13.977	10.451	11.261	4	8
Namibia	11.027	8.724	9.911	6.530	2	-34
Fillet, fresh c)	**67.442**	**67.985**	**79.139**	**84.978**	**100**	**7**
of it from Norway	19.769	17.589	18.179	17.889	21	-2
Iceland	42.334	46.186	53.184	63.732	75	20
Faroe Islands	5.145	4.055	7.764	3.227	4	-58
Fillet, frozen	**1.545.967**	**1.690.482**	**1.596.342**	**1.658.676**	**100**	**4**
of it from Norway	68.112	61.975	55.911	44.856	3	-20
Iceland	133.875	127.607	111.013	140.824	8	27
Faroe Islands	59.007	37.976	37.130	38.246	2	3
Russia	133.177	156.329	159.174	213.204	13	34
South Africa	35.334	39.735	35.300	38.234	2	8
Argentina	90.326	83.884	58.321	75.329	5	29
Namibia	112.751	117.263	118.758	116.706	7	-2
USA	239.466	319.339	345.196	295.691	18	-14
New Zealand	27.589	36.893	31.115	36.191	2	16
China	589.392	649.685	593.877	599.719	36	1
Meat, frozen	**130.305**	**136.983**	**137.075**	**121.597**	**100**	**-11**
of it from Norway	2.740	3.358	2.878	3.302	3	15
Iceland	13.347	10.916	10.817	12.956	11	20
Faroe Islands	7.390	2.510	3.450	3.154	3	-9
Russia	23.088	27.723	24.827	18.306	15	-26
USA	28.995	52.965	51.202	41.558	34	-19
Argentina	10.519	6.548	4.687	4.703	4	0
Namibia	19.412	20.400	15.730	17.076	14	9
China	11.839	17.357	17.475	9.880	8	-43
Fish and Fillet, dry/salted	**317.061**	**324.072**	**312.200**	**342.551**	**100**	**10**
of it from Norway	192.238	192.599	187.049	205.214	60	10
Iceland	82.202	84.102	81.681	91.322	27	12
Supply (Catches + Import)	2.771.119	2.932.604	2.828.236	2.943.902	100	4
of it catches of quoted species	318.038	319.431	322.206	323.413	11	0
import from third countries	2.453.081	2.613.173	2.506.030	2.620.489	89	5
of it from China d)	611.800	679.601	620.484	621.282	24	0
Norway	423.309	427.691	416.622	456.247	17	10
USA d)	324.174	413.834	448.424	382.890	15	-15
Iceland	312.637	305.147	288.311	340.427	13	18
Russia d)	200.526	232.419	243.333	298.554	11	23
Namibia d)	147.280	151.229	148.963	145.863	6	-2
Argentina d)	118.445	104.709	73.460	91.293	3	24
Faroe Islands d)	102.842	71.492	67.135	68.115	3	1
South Africa d)	63.449	69.491	63.787	63.440	2	-1
New Zealand d)	31.784	40.155	33.813	38.948	1	15
Chile d)	34.436	28.374	24.967	26.029	1	4
Peru d)	21.800	20.040	15.728	19.714	1	25
Uruguay d)	26.333	30.914	16.416	17.835	1	9

Notes: a) Cod, saithe, redfish, haddock, hake, alaska-pollock and hoki.- b) Selected countries, which are most important for EU supply with white fish.- c) Cod, saithe and redfish.- d) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.- Published by: AIPCE 2014

Tab. 4.4 Origin of imports into EU from third countries for cod a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**41.143**	**41.852**	**39.357**	**61.519**	**100**	**56**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	3.822	2.610	1.504	1.384	2	-8
Iceland	4.681	4.772	5.629	6.696	11	19
USA	-	-	-	-	-	-
Norway	32.552	34.455	32.214	53.385	87	66
Russia	-	-	-	-	-	-
South Africa	11	-	-	-	-	-
Whole, frozen	**116.684**	**120.550**	**134.135**	**168.821**	**100**	**26**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	372	236	598	1.091	1	82
Iceland	845	443	860	631	0	-27
USA	43.430	38.419	38.322	35.997	21	-6
Norway	20.859	24.932	33.807	61.565	36	82
Russia	41.592	47.273	50.501	57.216	34	13
South Africa	-	-	-	-	-	-
Fillet, fresh	**55.014**	**56.277**	**63.985**	**73.379**	**100**	**15**
of it from Faroe Islands	1.029	1.146	1.110	532	1	-52
Iceland	35.487	38.226	45.493	56.085	76	23
Norway	18.306	16.754	17.374	16.648	23	-4
Fillet, frozen	**271.807**	**303.601**	**296.741**	**347.353**	**100**	**17**
of it from Argentina	-	13	-	-	-	-
Chile	-	-	-	-	-	-
China	115.705	137.293	123.141	132.667	38	8
Faroe Islands	13.254	14.409	13.430	14.250	4	6
Iceland	65.216	67.723	59.329	73.432	21	24
USA	1.441	670	933	1.591	0	70
New Zealand	4	-	-	-	-	-
Norway	35.296	31.573	28.896	29.695	9	3
Russia	32.879	44.543	55.890	80.627	23	44
South Africa	-	-	-	-	-	-
Meat, frozen	**20.987**	**26.391**	**22.095**	**20.864**	**100**	**-6**
of it from Argentina	-	-	-	-	-	-
China	4.501	8.971	7.016	2.428	12	-65
Faroe Islands	304	211	116	189	1	64
Iceland	8.555	7.573	7.307	9.987	48	37
USA	3.500	3.237	2.859	3.188	15	12
Norway	2.128	3.141	2.501	2.718	13	9
South Africa	-	-	-	-	-	-
Fish and Fillet, dry/salted	**317.061**	**324.072**	**312.200**	**342.551**	**100**	**10**
of it from Iceland	82.202	84.102	81.681	91.322	27	12
Norway	192.238	192.599	187.049	205.214	60	10
Supply (Catches + Import)	961.144	1.011.370	1.013.134	1.146.313	100	13
of it catches of quoted species	138.449	138.629	144.620	131.826	12	-9
import from third countries	822.695	872.741	868.514	1.014.487	88	17
of it from Norway	301.379	303.454	301.842	369.225	36	22
Iceland	196.986	202.838	200.300	238.152	23	19
Russia c)	82.765	105.900	125.412	153.399	15	22
China c)	130.492	158.598	139.115	146.618	14	5
USA c)	50.014	43.920	43.309	41.275	4	-5
Faroe Islands c)	37.010	37.033	29.655	33.974	3	15
Vietnam c)	1.043	521	5.721	4.426	0	-23
Canada c)	7.001	4.170	2.471	2.195	0	-11
Argentina c)	-	13	-	-	-	-

Notes: a) Gadus morhua, ogac and macrocephalus.- b) Selected countries, which are most important for EU supply with white fish.- c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.5 Origin of imports into EU from third countries for saithe a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**13.029**	**10.346**	**9.083**	**10.350**	**100**	**14**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	1.309	759	276	167	2	-40
Iceland	789	1.045	773	286	3	-63
Namibia	-	-	-	-	-	-
Norway	10.931	8.543	8.034	9.881	95	23
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	**22.593**	**24.122**	**15.746**	**15.550**	**100**	**-1**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	27	1	50	383	2	-
Iceland	400	425	137	137	1	0
Namibia	-	-	-	-	-	-
Norway	22.171	23.450	14.541	14.493	93	0
Russia	46	514	1.018	345	2	-66
South Africa	-	-	-	-	-	-
Fillet, fresh	**7.539**	**5.928**	**9.749**	**6.687**	**100**	**-31**
of it from Faroe Islands	4.038	2.909	6.653	2.695	40	-59
Iceland	2.067	2.204	2.313	2.753	41	19
Norway	1.434	815	783	1.225	18	57
Fillet, frozen	**115.219**	**87.724**	**75.486**	**85.023**	**100**	**13**
of it from Argentina	-	-	-	-	-	-
Chile	-	13	17	-	-	-
China	22.246	23.591	18.055	15.963	19	-12
Faroe Islands	43.004	22.169	22.352	22.172	26	-1
Iceland	36.781	33.006	26.043	40.197	47	54
Namibia	-	-	-	-	-	-
New Zealand	-	-	3	-	-	-
Norway	12.200	8.357	7.206	5.233	6	-27
Russia	308	51	1.026	858	1	-16
South Africa	-	-	-	-	-	-
Meat, frozen	**9.617**	**4.091**	**5.124**	**4.802**	**100**	**-6**
of it from Argentina	-	-	-	-	-	-
China	116	134	397	743	15	87
Iceland	2.495	1.594	1.497	1.157	24	-23
Faroe Islands	6.831	2.208	3.051	2.703	56	-11
Namibia	-	-	-	-	-	-
Norway	175	155	179	193	4	8
Russia	-	-	-	6	0	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	220.360	185.760	163.174	171.381	100	5
of it catches of quoted species	52.362	53.549	47.986	48.970	29	2
import from third countries	167.998	132.211	115.188	122.411	71	6
of it from Iceland	42.532	38.274	30.763	44.530	36	45
Norway	46.910	41.321	30.743	31.025	25	1
Faroer Islands	55.210	28.045	32.383	28.120	23	-13
China c)	22.368	23.742	18.452	16.719	14	-9
Russia c)	353	565	2.044	1.209	1	-41

Notes: a) Pollachius virens.- b) Selected countries, which are most important for EU supply with white fish.-
c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-
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Tab. 4.6 Origin of imports into EU from third countries for redfish a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**16.626**	**13.217**	**11.900**	**11.661**	**100**	**-2**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	1.718	601	477	423	4	-11
Iceland	11.351	10.087	9.162	8.943	77	-2
Namibia	-	-	-	-	-	-
Norway	3.398	2.470	2.208	2.285	20	4
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	**15.242**	**20.263**	**14.501**	**15.822**	**100**	**9**
of it from Argentina	-	1	-	-	-	-
Faroe Islands	413	410	84	333	2	297
Iceland	11.698	12.726	10.479	11.439	72	9
Namibia	-	-	-	-	-	-
Norway	1.103	994	558	981	6	76
Russia	1.724	2.351	1.164	715	5	-39
South Africa	-	-	-	-	-	-
Fillet, fresh	**4.889**	**5.780**	**5.405**	**4.912**	**100**	**-9**
of it from Faroe Islands	78	-	-	-	-	-
Iceland	4.780	5.756	5.378	4.894	100	-9
Norway	30	20	22	16	0	-30
Fillet, frozen	**23.786**	**20.552**	**17.501**	**20.212**	**100**	**15**
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	14.923	11.789	9.282	10.285	51	11
Faroe Islands	92	163	86	299	1	248
Iceland	8.711	8.343	7.565	8.835	44	17
Namibia	-	-	-	-	-	-
New Zealand	7	6	-	-	-	-
Norway	54	35	26	9	0	-66
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Meat, frozen	**318**	**413**	**367**	**437**	**100**	**19**
of it from Argentina	-	-	-	-	-	-
China	59	73	69	7	2	-90
Faroe Islands	-	-	-	-	-	-
Iceland	259	304	297	430	98	45
Namibia	-	-	-	-	-	-
Norway	-	-	-	-	-	-
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	86.047	80.081	65.132	71.969	100	10
of it catches of quoted species	25.186	19.856	15.458	18.925	26	22
import from third countries	60.861	60.225	49.674	53.044	74	7
of it from Iceland	36.799	37.217	32.881	34.541	65	5
China c)	15.065	11.904	9.351	10.295	19	10
Norway	4.585	3.519	2.814	3.291	6	17
Faroe Islands	2.301	1.174	646	1.055	2	63
USA	11	98	582	804	2	38
Russia c)	1.724	2.351	1.164	715	1	-39
India c)	45	30	116	42	0	-64
New Zealand c)	7	6	-	-	-	-
Argentina c)	-	1	-	-	-	-
South Africa c)	-	-	-	-	-	-
Chile c)	-	-	-	-	-	-

Notes: a) Sebastes species.- b) Selected countries, which are most important for EU supply with white fish.-
c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-
Published by: AIPCE 2014

Tab. 4.7 Origin of imports into EU from third countries for haddock a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**36.055**	**34.310**	**32.397**	**30.163**	**100**	**-7**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	4.567	3.268	2.176	2.732	9	26
Iceland	11.311	6.736	6.466	4.790	16	-26
Namibia	-	-	-	-	-	-
Norway	20.177	24.306	23.756	22.641	75	-5
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	**32.870**	**35.724**	**40.748**	**20.594**	**100**	**-49**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	747	552	649	356	2	-45
Iceland	218	275	162	16	0	-90
Namibia	-	-	-	-	-	-
Norway	26.482	30.599	35.290	17.019	83	-52
Russia	5.221	4.257	4.521	2.889	14	-36
South Africa	-	-	-	-	-	-
Fillet, frozen	**92.902**	**103.018**	**104.117**	**77.567**	**100**	**-26**
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	31.710	36.580	35.465	25.793	33	-27
Faroe Islands	2.656	1.235	1.262	1.525	2	21
Iceland	22.752	18.359	16.490	17.259	22	5
Namibia	-	-	-	-	-	-
New Zealand	-	-	-	-	-	-
Norway	20.545	21.797	19.679	9.824	13	-50
Russia	13.335	22.777	28.649	21.555	28	-25
South Africa	-	-	-	-	-	-
Meat, frozen	**4.346**	**2.977**	**2.837**	**2.847**	**100**	**0**
of it from Argentina	-	-	-	-	-	-
China	1.608	1.116	1.087	1.055	37	-3
Faroe Islands	255	92	283	262	9	-7
Iceland	2.039	1.445	1.250	1.138	40	-9
Namibia	-	-	-	-	-	-
Norway	437	61	198	392	14	98
Russia	8	190	20	-	-	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	212.883	222.320	232.315	184.933	100	-20
of it catches of quoted species	46.711	46.291	52.215	53.762	29	3
import from third countries	166.172	176.029	180.100	131.171	71	-27
ot it from Norway	67.640	76.763	78.923	49.876	38	-37
China c)	33.409	37.696	36.587	26.848	20	-27
Russia c)	18.564	27.223	33.190	24.443	19	-26
Iceland	36.319	26.816	24.367	23.203	18	-5
Faroe Islands	8.224	5.146	4.370	4.875	4	12
South Africa c)	-	-	-	-	-	-

Notes: a) Melanogrammus aeglefinus.- b) Selected countries, which are most important for EU supply with white fish.-
c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-
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Tab. 4.8 Origin of imports into EU from third countries for hake a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**33.651**	**32.352**	**26.884**	**23.150**	**100**	**-14**
of it from Argentina	730	301	-	-	-	-
Chile	9.427	7.300	5.230	5.166	22	-1
Namibia	4.089	4.843	4.564	5.550	24	22
Norway	1.224	907	1.196	1.344	6	12
Peru	-	-	-	-	-	-
USA	807	952	557	69	0	-88
South Africa	12.058	11.316	8.273	5.346	23	-35
Uruguay	-	-	-	-	-	-
Whole, frozen	**62.091**	**58.840**	**54.825**	**53.439**	**100**	**-3**
of it from Argentina	16.870	13.976	10.451	11.261	21	8
Chile	11.049	8.855	7.937	8.098	15	2
Namibia	11.027	8.724	9.911	6.530	12	-34
Norway	259	499	404	863	2	114
Peru	-	11	-	-	-	-
USA	457	894	532	104	0	-80
South Africa	14.552	17.555	19.334	20.006	37	3
Uruguay	42	-	-	-	-	-
Fillet, frozen	**321.425**	**325.936**	**276.780**	**301.569**	**100**	**9**
of it from Argentina	90.325	83.863	58.185	75.271	25	29
Chile	6.223	5.547	4.613	7.138	2	55
China	7.519	8.569	7.359	8.083	3	10
Namibia	112.751	117.263	118.758	116.706	39	-2
Peru	18.498	17.251	13.393	17.993	6	34
Russia	-	-	-	-	-	-
South Africa	35.334	39.173	35.180	36.459	12	4
Uruguay	20.530	25.054	13.736	14.143	5	3
USA	29.707	28.613	27.429	24.426	8	-11
Meat, frozen	**53.547**	**51.252**	**41.130**	**39.745**	**100**	**-3**
of it from Argentina	10.519	6.548	4.687	4.703	12	0
Chile	7.524	6.471	7.169	5.627	14	-22
China	66	-	-	-	-	-
Namibia	19.412	20.400	15.730	17.076	43	9
Norway	-	-	-	-	-	-
Peru	2.994	1.893	1.003	680	2	-32
USA	8.117	11.144	9.990	7.403	19	-26
South Africa	1.472	1.408	980	1.628	4	66
Uruguay	3.265	3.253	1.545	2.551	6	65
Supply (Catches + Import)	526.044	529.487	461.546	487.833	100	6
of it catches of quoted species	55.330	61.106	61.927	69.930	14	13
import from third countries	470.714	468.381	399.619	417.903	86	5
of it from Namibia c)	147.280	151.229	148.963	145.863	35	-2
Argentina c)	118.445	104.688	73.323	91.235	22	24
South Africa	63.439	69.491	63.787	63.440	15	-1
USA	39.519	41.604	38.508	32.003	8	-17
Chile c)	34.223	28.173	24.949	26.029	6	4
Peru	21.800	20.040	15.728	19.714	5	25
Uruguay	26.333	30.914	16.416	17.835	4	9
China c)	7.628	8.569	7.471	8.212	2	10
Norway	1.491	1.476	1.612	2.234	1	39
Russia c)	2	1	7	3	0	-60

Notes: a) Merluccius spp. and urophycis spp..- b) Selected countries, which are most important for EU supply with white fish.- c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2014

Tab. 4.9 Origin of imports into EU from third countries for Alaska-pollock and pollock a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh c)	**1.066**	**746**	**605**	**529**	**100**	**-13**
or it from Argentina	-	-	-	-	-	-
Faroe Islands	2	3	0	-	-	-
Norway	1.041	710	596	528	100	-12
Russia	-	-	-	-	-	-
South Korea	0	-	-	-	-	-
Vietnam	-	-	-	-	-	-
USA	-	-	-	-	-	-
Whole, frozen d)	**1.158**	**1.185**	**999**	**996**	**100**	**0**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	-	-	-	-	-	-
Namibia	-	-	-	-	-	-
Norway	253	306	-	-	-	-
Russia	-	2	106	107	11	1
South Korea	36	1	16	8	1	-51
Vietnam	-	-	-	-	-	-
USA	816	662	849	786	79	-7
Fillet, frozen e)	**679.803**	**800.068**	**783.358**	**780.623**	**100**	**0**
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	384.310	419.754	390.981	397.771	51	2
Faroe Islands	-	-	-	-	-	-
Namibia	-	-	-	-	-	-
Norway	8	142	41	69	0	66
Russia	86.655	88.959	73.609	110.165	14	50
South Korea	415	176	1.586	1.101	0	-31
Vietnam	-	563	120	1.775	0	1378
USA	208.319	289.993	316.834	269.567	35	-15
Meat, frozen e)	**41.491**	**51.859**	**65.520**	**52.903**	**100**	**-19**
of it from Argentina	-	-	-	-	-	-
China	5.490	7.064	8.907	5.647	11	-37
Faroes Islands	-	-	-	-	-	-
Norway	-	-	-	-	-	-
Russia	10.462	7.418	7.801	8.469	16	9
South Korea	13	-	466	245	0	-47
Vietnam	63	-	-	-	-	-
USA	25.495	37.537	48.343	38.370	73	-21
Supply (Catches + Import)	723.518	853.857	850.482	835.051	100	-2
of it catches of quoted species	-	-	-	-	-	-
import from third countries	723.518	853.857	850.482	835.051	100	-2
of it from China f)	389.853	426.949	399.916	403.432	48	1
USA	234.630	328.192	366.025	308.723	37	-16
Russia	97.117	96.379	81.516	118.741	14	46
Vietnam	63	563	120	1.775	0	1378
South Korea	463	177	2.068	1.354	0	-35
Norway	1.302	1.158	638	597	0	-6
Canada f)	60	182	71	80	0	13
South Africa f)	-	-	7	-	-	-
Faroe Islands	2	3	0	-	-	-
Namibia f)	-	-	-	-	-	-

Notes: a) Theragra chalcogramma and Pollachius pollachius.- b) Selected countries, which are most important for EU supply with white fish.- c) Pollock (Pollachius pollachius).- d) Alaska-Pollock and pollock (Theragra chalcogramma and Pollachius pollachius until 2011.- e) Alaska-Pollock (Theragra chalcogramma).- f) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.10 Origin of imports into EU from third countries for hoki a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**d)**	**d)**	**d)**	**d)**		
of it from Argentina	d)	d)	d)	d)		
Faroe Islands	d)	d)	d)	d)		
Iceland	d)	d)	d)	d)		
Norway	d)	d)	d)	d)		
Russia	d)	d)	d)	d)		
South Africa	d)	d)	d)	d)		
Thailand	d)	d)	d)	d)		
USA	d)	d)	d)	d)		
Whole, frozen	**98**	**146**	**94**	**93**	**100**	**-1**
of it from Argentina	-	-	-	-	-	-
French South. Territ.	88	91	81	91	98	12
Iceland	-	-	-	-	-	-
China	-	-	-	-	-	-
New Zealand	5	21	13	2	2	-84
Norway	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Thailand	-	-	-	-	-	-
USA	-	-	-	-	-	-
Fillet, frozen	**41.025**	**49.583**	**42.359**	**46.330**	**100**	**9**
of it from Argentina	0	8	136	58	0	-
Chile	213	188	-	-	-	-
China	12.979	12.110	9.593	9.157	20	-5
Faroe Islands	-	-	-	-	-	-
Iceland	-	-	-	-	-	-
Namibia	-	-	-	-	-	-
New Zealand	27.577	36.887	31.112	36.191	78	16
Norway	1	-	50	-	-	-
South Africa	-	-	-	-	-	-
Thailand	-	-	71	5	0	-93
USA	-	64	-	107	0	-
Meat, frozen	**d)**	**d)**	**d)**	**d)**		
of it from Argentina	d)	d)	d)	d)		
Faroe Islands	d)	d)	d)	d)		
Iceland	d)	d)	d)	d)		
Norway	d)	d)	d)	d)		
Russia	d)	d)	d)	d)		
South Africa	d)	d)	d)	d)		
Thailand	d)	d)	d)	d)		
USA	d)	d)	d)	d)		
Supply (Catches + Import)	41.123	49.729	42.453	46.422	100	9
of it catches of quoted species	-	-	-	-	-	-
import from third countries	41.123	49.729	42.453	46.422	100	9
of it from New Zealand c)	27.582	36.908	31.125	36.193	78	16
China c)	12.983	12.144	9.593	9.157	20	-5
USA c)	-	64	-	107	0	-
Faroe Islands	88	91	81	91	0	12
Argentina c)	0	8	136	58	0	-57
Thailand c)	-	-	71	5	0	-93
Norway	1	-	50	-	-	-
Chile c)	213	188	-	-	-	-
South Africa c)	-	-	-	-	-	-
Iceland	-	-	-	-	-	-
Namibia c)	-	-	-	-	-	-

Notes: a) Macruronus novaezealandiae.- b) Selected countries, which are most important for EU supply with white fish.- c) Incl. quantities not listed above.- d) Not available.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.11 Origin of imports into EU from third countries for plaice a)

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**3.849**	**3.261**	**3.676**	**3.459**	**100**	**-6**
of it from Faroe Islands	193	219	237	151	4	-36
Iceland	2.126	1.350	2.021	2.054	59	2
Norway	1.529	1.692	1.418	1.254	36	-12
Russia	-	-	-	-	-	-
USA	-	-	-	-	-	-
Whole, frozen	**313**	**297**	**232**	**142**	**100**	**-39**
of it from Faroe Islands	-	5	25	2	1	-94
Iceland	149	47	17	53	37	203
Norway	16	0	3	3	2	-5
Russia	-	4	2	-	-	-
USA	-	0	-	-	-	-
Fillet, frozen	**1.989**	**1.997**	**1.944**	**1.917**	**100**	**-1**
of it from China	531	204	42	-	-	-
Faroe Islands	1	3	1	4	0	300
Iceland	1.449	1.791	1.901	1.866	97	-2
Norway	9	-	-	-	-	-
Russia	-	-	-	-	-	-
Supply (Catches + Import)	81.287	82.769	87.833	93.790	100	7
of it catches of quoted species	75.136	77.214	81.981	88.272	94	8
import from third countries	6.151	5.555	5.852	5.518	6	-6
of it from Iceland	3.724	3.188	3.940	3.972	72	1
Norway	1.554	1.693	1.421	1.257	23	-12
Faroe Islands	194	227	263	157	3	-40
USA	-	0	-	47	1	-
China	576	305	64	8	0	-88
Russia	-	4	2	-	-	-

Notes: a) Pleuronectes Platessa.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.12 Origin of imports into EU from third countries for surimi a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Surimi, frozen	**183.425**	**212.531**	**203.997**	**209.806**	**100**	**3**
of it from USA	77.666	115.162	111.424	151.158	72	36
Chile	16.618	5.636	4.895	2.850	1	-42
Vietnam	49.428	58.047	61.647	33.746	2	-45
Thailand	16.914	10.859	7.313	2.279	1	-69
Argentina	6.280	2.476	2.191	872	0	-60
India	10.586	12.568	12.849	16.377	8	27
China	1.891	688	327	327	0	0
Faroe Islands	-	614	529	-	-	-
Russia	89	172	-	-	-	-
Surimipresentation, frozen	**68.117**	**63.739**	**55.529**	**52.270**	**100**	**-6**
of it from China	26.828	24.442	21.677	18.165	35	-16
Thailand	21.164	19.034	16.453	18.249	35	11
India	14.484	14.826	12.696	10.647	20	-16
South Korea	3.445	3.705	3.180	3.618	7	14
Malaysia	495	416	583	657	1	13
Japan	261	392	288	382	1	33
USA	125	263	109	120	0	10
Peru	680	34	-	-	-	-
Russia	-	-	-	-	-	-
Supply (Catches + Import)	253.046	277.560	260.279	262.891	101	1
of it catches of quoted species	-	-	-	-	-	0
import from third countries	253.046	277.560	260.279	262.891	101	1
of it from USA	77.791	115.425	111.533	151.279	43	36
Vietnam c)	50.431	59.041	62.399	34.360	24	-45
India	25.069	27.394	25.545	27.024	10	6
Thailand	38.078	29.893	23.765	20.528	9	-14
China c)	28.719	25.130	22.004	18.492	8	-16
South Korea c)	3.445	3.705	3.180	3.618	1	14
Chile c)	16.618	5.636	4.895	2.850	2	-42
Peru c)	3.561	5.732	3.058	1.859	1	-39
Argentina c)	6.280	2.476	2.191	872	1	-60
Malaysia c)	495	416	583	657	0	13
Japan c)	261	392	288	382	0	33
Singapore	217	209	210	211	0	0

Notes: a) Surimi and surimi presentations.- b) Selected countries, which are most important for EU supply with surimi and surimi presentation.-
c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-
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Tab. 4.13 Origin of imports into EU from third countries for freshwater fish a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011 d)	2012 d)	2013 d)	2013	13/12
Whole, fresh	**2.413**	**2.736**	**758**	**391**	**100**	**-48**
of it from Norway	1	1	2	-	-	-
Russia	46	50	69	24	6	-65
Tansania	96	193	12	7	2	-42
Uganda	2.168	1.993	556	307	79	-45
Whole, frozen	**33.692**	**41.364**	**16.991**	**19.276**	**100**	**13**
of it from Bangladesh	2.856	4.268	2.254	2.175	11	-3
China	9.901	13.532	2.587	3.092	16	20
Indonesia	862	1.629	180	183	1	2
Myanmar	3.982	5.915	5.830	8.392	44	44
Tansania	991	1.098	42	139	1	231
Thailand	4.847	3.899	835	453	2	-46
Turkey	2.824	3.513	3.128	3.249	149	4
Uganda	1.841	1.158	120	3	0	-98
Vietnam	2.077	2.473	633	449	2	-29
Fillet, fresh	**4.824**	**3.439**	**486**	**310**	**100**	**-36**
of it from Russia	921	628	-	-	-	-
Tansania	737	851	-	-	-	-
Uganda	1.606	1.067	-	-	-	-
Vietnam	397	-	33	-	-	-
Fillet, frozen	**65.464**	**50.707**	**39.513**	**41.925**	**100**	**6**
of it from China	6.401	11.875	10.023	11.200	27	12
Indonesia	625	73	43	8	0	-82
Kasachstan	15.570	13.766	15.002	16.227	39	8
Russia	5.842	6.993	5.069	6.112	15	21
Tansania	1.033	748	273	59	0	-79
Uganda	547	233	-	-	-	-
Vietnam	32.217	14.764	6.472	4.601	11	-29
Meat, fresh	**2.821**	**3.223**	**1.721**	**1.530**	**100**	**-11**
of it from Norway	435	658	32	168	11	418
Sri Lanka	636	401	418	326	21	-22
USA	614	648	351	100	7	-71
Meat, frozen	**9.771**	**8.353**	**7.919**	**10.273**	**100**	**30**
of it from Chile	1.542	1.708	2.548	4.946	48	94
Norway	1.215	834	117	256	2	119
Vietnam	3.479	2.364	2.102	1.103	11	-48
Supply (Catches + Import)	118.986	109.821	67.388	73.705	100	9
of it catches of quoted species	-	-	-	-	-	-
import from third countries	118.986	109.821	67.388	73.705	100	9
of it from Kasachstan c)	15.893	14.104	15.256	16.468	22	8
China c)	17.824	27.132	13.308	15.365	21	15
Myanmar c)	3.982	5.915	5.830	8.392	11	44
Russia c)	6.982	7.865	5.405	6.373	9	18
Vietnam c)	38.170	19.601	9.240	6.153	8	-33
Chile c)	1.610	1.883	2.610	4.958	7	90
Turkey c)	2.824	3.513	3.128	3.249	4	4
Bangladesh c)	2.856	4.268	2.254	2.175	3	-3
Thailand c)	4.940	3.962	1.022	774	1	-24
Iceland c)	673	1.059	553	685	1	24

Notes: a) Different species of freshwater fish other than salmon, trout and carp.-

b) Selected countries, which are most important for EU supply with freshwater fish other than salmon, trout and carp.-

c) Incl. quantities not listed above.- d) Not comparable with previous years due to change of CN-Code and new coverage of fish species (without pangasius, nile perch and tilapia).-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.14 Origin of imports into EU from third countries for pangasius

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013 a)	2013	13/12
Fillet, fresh	**7.000**	**5.885**	**16.664**	**5.630**	**100**	**-66**
of it from Bangladesh	-	-	-	-	-	-
China	-	-	109	98	2	-10
Ecuador	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-
Kenya	-	-	-	-	-	-
Thailand	22	-	13	-	-	-
Tanzania	-	-	-	-	-	-
Uganda	-	-	-	-	-	-
Vietnam	6.978	5.885	16.395	5.281	94	-68
Zimbabwe	-	-	242	218	4	-10
Fillet, frozen	**696.961**	**611.192**	**476.678**	**470.532**	**100**	**-1**
of it from Bangladesh	222	130	146	-	-	-
China	593	1.235	987	335	0	-66
Ecuador	-	-	-	-	-	-
Indonesia	-	49	-	1	0	-
Kenya	-	-	-	-	-	-
Thailand	97	98	44	26	0	-41
Tanzania	-	-	-	-	-	-
Uganda	31	-	-	-	-	-
Vietnam	695.942	609.648	475.200	469.878	100	-1
Zimbabwe	-	-	-	-	-	-
Supply (Catches + Import)	703.961	617.077	493.342	476.162	100	-3
of it catches of quoted species	-	-	-	-	-	-
import from third countries	703.961	617.077	493.342	476.162	100	-3
of it from Vietnam	702.920	615.533	491.595	475.159	100	-3
China	593	1.235	1.096	433	0	-60
Thailand	119	98	57	26	0	-55
Bangladesh	222	130	146	-	-	-
Uganda	31	-	-	-	-	-

Note: a) Including other catfish species.-

Source: Eurostat-Comext; EU catch report.-
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Tab. 4.15 Origin of imports into EU from third countries for nile perch

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Fillet, fresh	**47.589**	**46.804**	**47.005**	**42.353**	**100**	**-10**
of it from Bangladesh	-	-	-	-	-	-
China	-	-	27	-	-	-
Ecuador	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-
Kenya	4.463	5.137	5.190	4.993	12	-4
Thailand	-	-	-	-	-	-
Tanzania	21.249	22.717	20.386	17.836	42	-13
Uganda	21.872	18.944	21.382	19.507	46	-9
Vietnam	-	-	-	-	-	-
Zimbabwe	-	-	61	-	-	-
Fillet, frozen	**22.649**	**14.827**	**19.021**	**15.492**	**100**	**-19**
of it from Bangladesh	-	-	-	-	-	-
China	22	-	-	-	-	-
Ecuador	-	-	-	-	-	-
Indonesia	-	47	-	-	-	-
Kenya	3.446	1.094	1.629	1.377	9	-15
Thailand	11	-	-	-	-	-
Tanzania	14.917	10.625	13.615	9.732	63	-29
Uganda	4.142	2.953	3.777	4.382	28	16
Vietnam	111	107	-	-	-	-
Zimbabwe	-	-	-	-	-	-
Supply (Catches + Import)	70.238	61.631	66.025	57.845	100	-12
of it catches of quoted species	-	-	-	-	-	-
import from third countries	70.238	61.631	66.025	57.845	100	-12
of it from Tansania	36.166	33.342	34.001	27.568	48	-19
Uganda	26.014	21.897	25.159	23.889	41	-5
Kenya	7.909	1.094	1.629	1.377	2	-15
Vietnam	111	107	-	-	-	-
Indonesia	-	47	-	-	-	-
China	22	-	27	-	-	-
Zimbabwe	5	-	-	-	-	-

Source: Eurostat-Comext; EU catch report.-
Published by: AIPCE 2014

Tab. 4.16 Origin of imports into EU from third countries for tilapia

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**75**	**85**	**2**	**3**	**100**	**87**
of it from Bangladesh	-	-	-	-	-	-
China	22	56	-	-	-	-
Ecuador	8	8	1	-	-	-
Indonesia	-	-	-	-	-	-
Kenya	-	-	-	-	-	-
Thailand	14	10	-	-	-	-
Tanzania	-	-	-	-	-	-
Uganda	-	-	-	-	-	-
Vietnam	30	11	-	-	-	-
Zimbabwe	-	-	-	1	36	-
Whole, frozen	**-**	**-**	**12.789**	**14.237**	**100**	**11**
of it from Bangladesh	-	-	17	56	0	229
China	-	-	10.353	12.443	87	20
Ecuador	-	-	65	-	-	-
Indonesia	-	-	346	560	4	62
Kenya	-	-	118	97	1	-18
Thailand	-	-	21	-	-	-
Tanzania	-	-	22	-	-	-
Uganda	-	-	1.590	394	3	-75
Vietnam	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-
Fillet, fresh	**-**	**-**	**1.063**	**743**	**100**	**-30**
of it from Bangladesh	-	-	-	-	-	-
China	-	-	289	304	41	5
Ecuador	-	-	572	283	38	-51
Indonesia	-	-	-	-	-	-
Kenya	-	-	-	-	-	-
Thailand	-	-	7	-	-	-
Tanzania	-	-	-	-	-	-
Uganda	-	-	-	-	-	-
Vietnam	-	-	1	33	4	-
Zimbabwe	-	-	194	122	16	-37
Fillet, frozen	**42.139**	**42.008**	**35.347**	**42.714**	**100**	**21**
of it from Bangladesh	-	-	-	51	0	-
China	37.159	36.206	31.001	35.551	83	15
Ecuador	142	147	116	36	0	-69
Indonesia	3.380	3.774	2.976	4.220	10	42
Kenya	-	-	-	-	-	-
Thailand	937	699	389	477	1	23
Tanzania	-	13	-	-	-	-
Uganda	-	-	160	-	-	-
Vietnam	362	944	299	2.176	5	628
Zimbabwe	3	-	-	-	-	-
Supply (Catches + Import)	42.214	42.093	49.200	57.696	100	17
of it catches of quoted species	-	-	-	-	-	-
import from third countries	42.214	42.093	49.200	57.696	100	17
of it from China	37.181	36.262	41.642	48.298	84	16
Indonesia	3.380	3.774	3.322	4.780	8	44
Vietnam	393	955	557	2.895	5	420
Thailand	951	709	1.985	871	2	-56
Ecuador	150	154	753	319	1	-58
Zimbabwe	3	-	194	123	0	-36
Bangladesh	-	-	17	107	0	531
India	-	-	118	97	0	-18

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2014

Tab. 4.17 Overview of the adjusted rates of conversion

	COD		POK		RED		AP		SAL		Freshwater fish		PANGASIUS		SURIMI		TUNA	
	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.
Whole, fresh		1,17		1,19		1,07		1,16		1,15		1,00						
Whole, frozen	1,50	1,71		1,51		1,93	1,71	1,51		1,15		1,00					1,20	1,11
Fillet, fresh	2,90	3,48		2,73		3,37				2,50		2,22		2,22				
of it from China									2,27									
Vietnam											3,33		3,33					
Fillet, frozen	2,20	2,95		2,43		3,00		2,95		2,50		2,22		2,22			2,38	4,00
of it from China			2,22		2,78		2,38		2,27		2,02							
Russia							3,70											
USA							3,70											
Vietnam											3,33		3,33					
Meat, fresh												2,22						
of it from Vietnam											3,33							
Meat, frozen	2,40	2,64		2,12		2,34		2,64				2,22						
of it from China											2,02							
Vietnam											3,33							
Fillet, dry / salted	4,31	4,31																
Fish, dry / salted	6,60	8,33																
Fish, dry / salted	3,65	4,00																
Fish, salted	2,55	2,74																
Prepared																	1,74	2,00
Loins, prepared																	2,64	1,74
Surimi															4,55	7,50		
Surimi, prepared															1,70	6,33		

Source: Own estimations of AIPCE experts.-
Published by: AIPCE 2014

Tab. 5.1 Origin of imports into EU from third countries for salmon a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**555.809**	**602.806**	**696.934**	**687.085**	**100**	**-1**
of it from Canada	67	124	124	264	0	114
Chile	-	7	50	73	0	46
Faroe Islands	22.967	38.421	42.615	42.409	6	0
Iceland	13	-	192	140	0	-27
Norway	532.596	564.159	653.847	643.856	94	-2
USA	126	95	71	96	0	36
Whole, frozen	**14.886**	**14.201**	**20.348**	**30.838**	**100**	**52**
of it from Canada	703	738	992	1.311	4	32
Chile	430	334	1.355	4.368	14	222
China	1.622	1.330	735	402	1	-45
Faroe Islands	144	24	-	1.529	5	-
Iceland	6	-	15	103	0	572
Norway	3.634	3.203	4.988	4.889	16	-2
Thailand	168	24	-	-	-	-
USA	21.619	18.733	12.258	16.701	54	36
Fillet, fresh	**105.649**	**108.272**	**145.358**	**140.622**	**100**	**-3**
of it from Canada	100	171	118	228	0	93
Chile	55	310	1.206	1.175	1	-3
China	604	344	1.603	1.848	1	15
Faroe Islands	1	-	495	1.080	1	118
Iceland	2	-	8	2	0	-70
Norway	104.835	107.393	141.810	136.187	97	-4
USA	51	51	58	56	0	-3
Fillet, frozen	**181.025**	**170.214**	**167.958**	**201.565**	**100**	**20**
of it from Canada	619	597	474	641	0	35
Chile	17.176	24.061	30.184	59.338	29	97
China	92.826	83.231	65.203	65.584	33	1
Faroe Islands	16.624	16.242	19.088	22.510	11	18
Iceland	168	85	2	3	0	67
Norway	41.585	35.545	43.352	43.163	21	0
Thailand	641	309	218	116	0	-47
USA	7.602	7.840	8.252	8.234	4	0
Salmon prepared	**57.018**	**48.761**	**41.713**	**40.115**	**100**	**-4**
of it from Canada	13.541	8.285	9.258	6.295	16	-32
Chile	354	161	268	154	0	-43
China	3.319	3.921	3.582	3.431	9	-4
Faroe Islands	13	-	-	1	0	-
Iceland	16	14	99	104	0	5
Norway	1.617	1.313	1.022	1.188	3	16
Thailand	3.527	1.907	1.767	1.757	4	-1
USA	34.092	32.929	24.998	26.614	66	6
Supply (Catches + Import)	915.003	944.823	1.072.890	1.100.702	100	3
of it catches of quoted species	616	569	579	477	0	-18
import from third countries	914.387	944.254	1.072.311	1.100.225	100	3
of it from Norway c)	684.266	711.612	845.018	829.281	75	-2
China c)	98.392	88.826	71.122	71.266	6	0
Faroe Islands	39.748	54.687	62.197	67.528	6	9
Chile c)	18.015	24.873	33.063	65.108	6	97
USA	63.489	59.648	45.636	51.701	5	13
Canada	15.031	9.915	10.966	8.740	1	-20
Russia c)	2.675	1.951	853	3.197	0	275
Thailand	4.336	2.240	1.985	1.873	0	-6

Notes: a) Salmon salar and other salmon species.- b) Selected countries, which are most important for EU supply with white fish.- c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2014

Tab. 5.2 Origin of imports into EU from third countries for tuna

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Live b)	**1.179**	**-**	**402**	**-**	**100**	-
Whole, fresh	**5.200**	**5.683**	**4.728**	**4.409**	**100**	-7
of it **White Tuna (Th. alalunga)**	**952**	**830**	**361**	**142**	**100**	-61
of it from Ecuador	-	-	-	-	-	-
of it **Yellow Tuna (Th. albacares)**	**3.688**	**4.367**	**3.942**	**3.967**	**100**	1
of it from Maledives	972	3.128	3.250	2.733	69	-16
of it **Bonito**	**32**	**125**	**23**	**0**	**100**	-98
of it **Big-eye Tuna (Th. obesus)**	**50**	**39**	**29**	**69**	**100**	139
of it **Red Tuna b)**	**428**	**147**	**216**	**209**	**100**	-3
of it **other Tuna species**	**50**	**174**	**158**	**22**	**100**	-86
Whole, frozen	**195.584**	**205.870**	**200.469**	**195.274**	**100**	-3
of it **White Tuna (Th. alalunga)**	**21.657**	**30.038**	**20.610**	**22.177**	**100**	8
of it from South Africa	8.631	5.244	5.733	3.735	17	-35
USA	5.747	4.501	5.461	4.260	19	-22
Thailand	-	1.070	144	-	-	-
of it **Yellow Tuna (Th. albacares)**	**123.979**	**125.034**	**125.721**	**120.858**	**100**	-4
of it from Thailand	1.638	3.496	5.655	4.043	3	-29
Phillipines	23.215	17.405	12.145	20.217	17	66
Panama	5.518	8.731	6.889	5.541	5	-20
Mexico	20.736	28.593	25.344	11.553	10	-54
Kap Verde	6.608	5.562	4.532	3.156	3	-30
of it **Bonito**	**41.615**	**40.303**	**45.934**	**42.250**	**100**	-8
of it from Panama	7.449	10.559	8.257	6.772	16	-18
Guatemala	4.336	2.986	3.889	4.964	12	28
Kap Verde	5.062	5.407	6.117	6.712	16	10
of it **Big-eye Tuna (Th. obesus)**	**7.822**	**9.863**	**7.587**	**9.666**	**100**	27
of it from Seychelles	950	1.772	1.073	1.880	19	75
of it **Red Tuna b)**	**37**	**1**	**-**	**-**	**-**	-
of it **other Tuna species**	**473**	**631**	**347**	**300**	**100**	-13
of it from Panama	183	138	12	3	1	-70
Fillets, fresh d)	**57.694**	**57.593**	**39.435**	**37.697**	**100**	-4
of it from Sri Lanka	14.136	14.136	8.035	8.860	24	10
Fillets, frozen	**19.923**	**24.308**	**26.319**	**29.549**	**100**	12
of it from Sri Lanka	3.228	3.228	395	624	2	58
Vietnam	7.593	9.523	9.247	9.527	32	3
Tuna, loins	**276.532**	**288.865**	**269.512**	**280.388**	**100**	4
of it from Ecuador	98.236	96.252	90.389	113.503	40	26
Thailand	32.148	43.343	20.928	24.038	9	15
Mauritius	33.197	30.947	30.867	20.245	7	-34
Tuna, prepared	**646.772**	**677.748**	**647.405**	**709.626**	**100**	10
of it from Ecuador	108.127	124.417	128.182	146.311	21	14
Thailand	116.631	130.290	80.912	105.505	15	30
Phillipines	79.006	61.959	53.768	51.951	7	-3
Mauritius	77.125	76.610	81.634	87.828	12	8
Supply (Catches + Import)	**1.176.066**	**1.244.070**	**1.190.248**	**1.260.566**	**100**	**6**
of it catches of EU quoted tuna	30.876	41.596	41.413	41.321	3	0
import from third countries	1.145.190	1.202.474	1.148.835	1.219.245	97	6
of it from Ecuador c)	213.513	231.207	225.478	268.435	22	19
Thailand c)	150.992	178.577	107.704	133.613	11	24
Mauritius c)	111.162	113.588	119.155	113.287	9	-5
Seychelles c)	79.162	80.983	81.679	100.064	8	23
Phillipines c)	103.581	81.016	67.562	81.934	7	21
Ivory Coast c)	59.089	48.657	65.221	63.766	5	-2
Ghana c)	59.846	54.573	56.083	45.020	4	-20
Vietnam c)	23.153	28.762	34.602	42.291	3	22
Guatemala c)	32.587	26.115	32.333	31.935	3	-1
Columbia c)	27.090	32.718	25.995	24.902	2	-4

Notes: a) Selected countries, which are most important for EU supply with tuna.- b) Thunnus thynnus, orientalis and Thunnus maccoyii.-
c) Incl. quantities not listed above.- d) Estimation.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 5.3 Origin of imports into EU from third countries for herring a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**59.549**	**24.980**	**28.130**	**34.099**	**100**	**21**
of it from Faroe Islands	20.702	3.349	309	61	0	-80
Norway	38.847	21.631	27.819	34.039	100	22
Whole, frozen	**60.235**	**55.794**	**43.619**	**47.052**	**100**	**8**
of it from Canada	449	905	282	411	1	46
China	-	-	-	-	-	-
Faroe Islands	5.822	9.751	4.736	9.231	20	95
Iceland	3.914	1.918	1.506	1.102	2	-27
Norway	49.050	40.130	33.780	35.931	76	6
Russia	-	-	-	782	2	-
South Corea	-	-	3	1.290	3	-
USA	902	2.457	3.111	330	1	-89
Herring flaps, fresh	**3.568**	**4.373**	**4.074**	**4.388**	**100**	**8**
of it from Norway	3.567	4.373	4.070	4.375	100	7
Herring fillets, frozen	**106.540**	**109.548**	**90.897**	**73.848**	**100**	**-19**
of it from Canada	-	-	86	54	0	-38
Faroe Islands	1.598	1.141	2.521	3.799	5	51
Iceland	29.390	30.012	23.175	23.673	32	2
Norway	75.539	78.349	65.112	46.322	63	-29
Herring flaps, frozen	**185.596**	**164.529**	**123.441**	**98.337**	**100**	**-20**
of it from Canada	2.902	7.490	2.339	1.687	2	-28
Faroe Islands	13.907	9.959	6.372	12.083	12	90
Iceland	47.902	37.167	27.255	22.392	23	-18
Norway	120.822	109.913	87.475	62.176	63	-29
Herring, smoked	**1.501**	**1.447**	**865**	**949**	**100**	**10**
of it from Canada	1.309	1.299	771	932	98	21
China	118	10	-	-	-	-
Norway	73	93	93	11	1	-88
Herring, salted	**1.984**	**1.187**	**1.206**	**1.600**	**100**	**33**
of it from Canada	56	-	-	4	0	-
Norway	1.927	1.187	1.206	1.561	98	29
Herring presentations, others	**40.564**	**39.625**	**31.605**	**28.625**	**100**	**-9**
of it from Iceland	1.583	600	906	1.628	6	80
Norway	39.091	38.820	30.827	27.073	95	-12
Russia	-	3	-	-	-	-
Supply (Catches + Import)	**909.107**	**937.782**	**986.530**	**998.613**	**100**	**1**
of it catches of EU quoted herring	449.570	536.298	662.693	709.716	71	7
import from third countries	459.537	401.484	323.837	288.897	29	-11
of it from Norway	328.916	294.496	250.382	211.488	73	-16
Iceland	82.788	69.697	52.842	48.795	17	-8
Faroe Islands	42.029	24.201	13.938	25.173	9	81
Canada	4.717	9.693	3.479	3.087	1	-11
South Corea	-	-	3	1.290	1	-
Russia	-	3	-	782	0	-
USA	902	2.457	3.111	330	0	-89
China	118	10	-	-	-	-

Notes: a) Clupea harengus and clupea pallasii.- b) Selected countries, which are most important for EU supply with herring.-

Source: Eurostat-Comext; EU catch report.-
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Tab. 5.4 Origin of imports into EU from third countries for mackerel a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Whole, fresh	**11.605**	**3.776**	**18.035**	**1.740**	**100**	**-90**
of it from Faroer Islands	866	1.111	-	-	-	-
Norway	10.723	2.653	18.021	1.714	99	-90
Whole, frozen	**41.945**	**66.322**	**72.188**	**62.997**	**100**	**-13**
of it from Argentina	2	6	-	27	0	-
Canada	4.643	2.865	318	51	0	-84
China	886	2.429	2.470	1.589	3	-36
Ecuador	55	24	-	39	0	-
Faroe Islands	10.958	34.137	35.833	28.741	46	-20
Iceland	2.696	9.981	8.413	6.949	11	-17
Morocco	930	2.575	3.031	926	1	-69
Norway	19.180	12.514	19.840	21.152	34	7
Peru	118	466	197	466	1	136
Thailand	20	1	-	-	-	-
USA	1.211	25	930	264	0	-72
Fillets, frozen c)	**6.935**	**7.769**	**8.163**	**8.554**	**100**	**5**
of it from China	1.461	1.779	1.347	1.607	19	19
India	34	8	0	-	-	-
Norway	5.196	4.484	5.470	5.132	60	-6
Vietnam	41	39	5	-	-	-
Smoked	**123**	**5**	**7**	**3**	**100**	**-46**
of it from China	106	-	2	-	-	-
Norway	5	3	2	2	50	0
Prepared d)	**23.224**	**30.634**	**29.259**	**30.860**	**100**	**5**
of it from Albania	11	19	7	-	-	-
Chile	161	-	-	-	-	-
China	2.110	3.085	2.650	3.751	12	42
Kap Verde	2.261	5.460	4.409	2.996	10	-32
Ecuador	611	631	721	172	1	-76
Morocco	15.123	18.729	18.827	22.023	71	17
Norway	9	8	12	47	0	289
Peru	515	915	911	209	1	-77
Thailand	2.195	1.442	1.548	1.440	5	-7
Supply (Catches + Import)	**488.112**	**463.026**	**379.630**	**336.343**	**100**	**-11**
of it catches of EU quoted mackerel	404.280	354.521	251.978	232.189	69	-8
import from third countries	83.832	108.505	127.652	104.154	31	-18
of it from Faroe Islands	11.869	35.275	35.833	29.287	28	-18
Norway	24.385	17.006	25.323	26.331	25	4
Morocco	16.109	21.427	21.914	23.077	22	5
China	4.562	7.292	6.468	6.947	7	7
Kap Verde	2.261	5.460	4.409	2.996	3	-32
Thailand	2.227	1.442	1.548	1.440	1	-7
Peru	633	1.419	1.108	675	1	-39
USA	1.211	25	930	264	0	-72
Ecuador	665	860	852	211	0	-75
Canada	4.643	2.865	318	51	0	-84
Taiwan	312	681	321	-	-	-
Chile	161	-	-	-	-	-

Notes: a) Scomber scombrus, S. australasicus and S. japonicus.- b) Selected countries, which are most important for EU supply with mackerel.- c) Including frozen fillets of the species Orcynopsis unicolor.- d) Not including CN Code 1604 20 50.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 5.5 Origin of imports into EU from third countries for shrimp

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
Shrimp (Pandalidae), frozen	**69.820**	**59.387**	**58.793**	**57.875**	**100**	-2
of it from Greenland	55.213	51.469	45.567	46.089	80	1
Shrimp (Crangon), frozen	**222**	**39**	**5**	**11**	**100**	119
Rose Shrimp (Parapenaeus), frozen	**8.267**	**11.611**	**12.111**	**12.471**	**100**	3
of it from Morocco	3.440	4.584	3.908	3.185	26	-19
Senegal	1.466	3.367	4.829	4.583	37	-5
Shrimp (Penaeus spp.), frozen	**361.127**	**339.655**	**308.874**	**294.755**	**100**	-5
of it from Ecuador	85.858	94.923	90.564	94.502	32	4
India	37.509	42.176	46.337	48.005	16	4
Bangladesh	30.972	32.212	33.322	32.597	68	-2
Shrimp, other species, frozen	**122.469**	**144.717**	**131.985**	**139.234**	**100**	5
of it from Argentina	30.522	52.992	53.735	67.227	48	25
China	33.086	31.528	28.082	31.392	23	12
Shrimp (Pandalidae), not frozen	**890**	**735**	**12**	**10**	**100**	-15
of it from Morocco	101	101	1	1	13	-8
Shrimp (Crangon), fresh or cooked	**234**	**22**	**1**	**-**	-	-
of it from Morocco	216	21	-	-	-	-
Shrimp (Crangon) other than [1)]	**1**	**11**	**-**	**-**	-	-
of it from Morocco	**-**	**11**	**-**	**-**	-	-
Shrimp, other species, not frozen	**418**	**381**	**289**	**281**	**100**	-3
of it from China	26	58	74	19	7	-75
Shrimp, prepared/preserved	**391.519**	**390.061**	**362.789**	**349.281**	**100**	-4
of it from Thailand	75.783	74.087	72.752	50.236	14	-31
Greenland	66.751	63.379	59.605	54.397	16	-9
Canada	63.762	62.219	63.422	81.702	23	29
Vietnam	31.917	38.300	33.196	33.719	10	2
Morocco	28.734	28.541	25.719	26.477	8	3
Shrimp, smoked	**-**	**-**	**468**	**159**	**100**	-66
of it from China	-	-	134	-	-	-
Supply (Catches + Import)	**965.713**	**974.609**	**884.384**	**862.969**	**100**	**-2**
of it catches of EU quoted shrimp [2)]	10.747	27.990	9.057	8.893	1	-2
import from third countries	954.966	946.619	875.327	854.076	99	-2
of it from Greenland b)	121.964	115.203	105.171	100.486	12	-4
Ecuador b)	92.865	108.084	104.940	97.595	11	-7
Canada b)	71.694	67.333	70.230	89.189	10	27
India b)	74.715	72.063	74.809	85.191	10	14
Argentina b)	65.380	72.580	64.250	69.519	8	8
Thailand b)	121.672	112.922	101.871	63.939	7	-37
Vietnam b)	64.139	71.627	56.961	59.930	7	5
China b)	55.091	53.005	49.749	49.852	6	0
Bangladesh b)	45.069	47.264	47.353	47.347	6	0
Morocco b)	33.491	34.245	30.296	30.958	4	2
Indonesia b)	41.858	33.996	20.397	22.538	3	10
Iceland b)	30.341	25.119	21.433	17.054	2	-20
Honduras b)	11.962	12.223	10.683	13.391	2	25
Nicaragua b)	9.743	10.934	12.959	13.198	2	2
Venezuela b)	8.313	9.949	10.524	10.299	1	-2
Madagascar b)	9.764	9.332	9.170	8.784	1	-4
USA b)	3.084	7.190	7.776	7.037	1	-10
Senegal b)	3.855	5.870	6.466	6.876	1	6
Nigeria b)	4.771	4.713	4.288	3.677	0	-14
Mozambique b)	7.665	6.543	2.466	2.639	0	7

Notes: a) Selected countries, which are most important for EU supply with shrimp.- b) Incl. quantities not listed above.-
1) Fresh, chilled or cooked.- 2) Only quota for Pandalus borealis.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2014

Tab. 5.6 Origin of imports into EU from third countries for cephalopods

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2010	2011	2012	2013	2013	13/12
SQUID total	**221.222**	**202.827**	**206.739**	**190.079**	**40**	**-8**
of it Loligo, frozen	182.431	163.016	166.571	158.984	100	-5
of it L. patagonico	40.304	24.245	43.415	40.640	100	-6
of it from Falkland Isles	37.628	20.891	39.489	32.321	80	-18
of it L. vulgaris	9.441	9.799	6.804	10.881	100	60
of it from Morocco	3.066	4.447	3.751	6.882	63	83
of it L. pealei	726	1.332	1.399	1.129	100	-19
of it from USA	726	1.291	1.374	1.121	99	-18
of it other loligo	131.961	127.640	114.954	106.335	100	-7
of it from India	42.840	38.256	36.985	34.379	32	-7
Thailand	24.061	24.433	21.262	19.504	18	-8
of it other squid (Pota and Poton) c)	26.304	34.598	34.641	25.618	100	-26
of it from China	11.263	14.817	14.319	14.299	56	0
Squid, fresh	1.612	1.087	1.162	1.869	100	61
Squid, prepared	10.876	4.126	4.365	3.608	100	-17
ILLEX frozen total	**57.509**	**38.732**	**42.204**	**53.236**	**11**	**26**
of It from Argentina	27.571	18.821	23.836	39.211	74	65
China	23.832	12.472	8.035	9.694	18	21
CUTTLE FISH total	**67.885**	**60.963**	**49.179**	**41.570**	**9**	**-15**
of it sepiola, frozen	66.767	59.938	48.020	40.737	100	-15
of it S. rondeleti	91	197	368	200	0	-46
of it excluding S. rondeleti	8.859	6.578	1.773	934	2	-47
of it from Morocco	5.301	3.704	364	119	13	-67
of it other species	57.817	53.163	45.879	39.603	100	-14
of it from India	20.749	16.899	10.738	5.732	14	-47
Morocco	9.888	11.653	16.403	17.178	43	5
Cuttle fish, fresh	653	770	920	755	100	-18
Cuttle fish, prepared	465	255	239	79	100	-67
OCTOPUS total	**84.175**	**90.806**	**77.006**	**81.155**	**17**	**5**
of it octopus frozen	83.700	90.353	76.555	80.926	100	6
of It from Morocco	28.629	20.544	22.828	41.213	51	81
Mexico	12.427	13.603	6.502	6.225	8	-4
Senegal	4.429	8.437	8.465	3.755	5	-56
of it octopus, fresh	344	269	417	186	100	-55
of it octopus, prepared	131	183	34	43	100	26
OTHER CEPHAL. , frozen d)	**79.855**	**103.704**	**90.821**	**106.768**	**23**	**18**
of It from Peru	36.590	44.694	40.886	46.673	44	14
India	15.971	19.126	18.503	27.545	26	49
Supply (Catches + Import)	**510.646**	**497.032**	**465.950**	**472.807**	**100**	**1**
of it catches of EU quoted cephalopods	-	-	-	-	-	-
import from third countries	510.646	497.032	465.950	472.807	100	1
of it from India b)	87.278	83.731	72.645	72.928	15	0
China b)	73.029	63.460	55.463	70.098	15	26
Morocco b)	50.234	43.881	46.909	69.605	15	48
Peru b)	57.217	59.739	65.764	66.364	14	1
Falkland Isles b)	51.438	36.743	53.866	41.376	9	-23
Argentina b)	27.983	19.078	24.033	39.226	8	63
Thailand b)	33.775	32.715	29.147	25.751	5	-12
Vietnam b)	25.692	26.464	23.651	17.170	4	-27
Mauretania b)	10.654	10.838	12.943	14.226	3	10
Indonesia b)	10.107	13.118	11.353	8.261	2	-27
USA b)	9.878	15.145	13.641	8.195	2	-40
Senegal b)	8.173	12.952	11.376	7.503	2	-34
Chile b)	5.651	16.662	15.710	7.482	2	-52
Mexico b)	14.814	14.017	7.172	6.433	1	-10
Tunisia b)	9.036	12.992	10.084	6.123	1	-39

Notes: a) Selected countries, which are most important for EU supply with cephalopods.- b) Incl. quantities not listed above.-
c) Pota= i.e. Todadorus pacificus, Poton=i.e. Dosidicus gigas.- d) includ. Pota and Poton.-
Source: Eurostat-Comext; EU catch report.-
Published by: AIPCE 2014

Tab. 6.1 EU-Quota by species

Species	Code-name	EU (25)		EU (27)				
		2009	2010	2011	2012	2013 a)	Change 13/12	Quota '13 by species
		tonnes					%	%
Herring	HER	617.041	600.720	639.533	776.656	817.118	5,2	22,2
Sprat	SPR	617.725	584.427	513.762	441.462	456.583	3,4	12,4
Anchovy	ANE	8.000	30.600	38.142	28.696	28.331	-1,3	0,8
Atl. Salmon	SAL	1.626	1.548	1.328	690	612	-11,3	0,0
Cod	COD	138.779	158.351	162.310	186.398	197.353	5,9	5,4
Haddock	HAD	60.501	52.239	53.331	67.258	61.393	-8,7	1,7
Saithe	POK	83.429	71.250	61.351	53.451	59.930	12,1	1,6
Pollack	POL	17.980	16.211	15.887	15.835	15.887	0,3	0,4
Norway pout	NOP	117.750	76.000	4.500	75.750	167.500	121,1	4,6
Blue whiting	WHB	146.593	130.014	22.912	80.272	221.923	176,5	6,0
Greater forkbeard	GFB	2.380	2.380	2.560	2.547	2.488	-2,3	0,1
Whiting	WHG	34.836	30.275	35.608	41.703	48.436	16,1	1,3
Hake b)	HKE	64.604	67.934	75.386	76.939	88.474	15,0	2,4
Jack&horse macke.	JAX	264.219	263.717	274.609	267.066	267.379	0,1	7,3
Mackerel	MAC	492.851	500.551	381.467	391.993	337.833	-13,8	9,2
Europ. Plaice	PLE	75.239	81.912	90.016	100.563	115.378	14,7	3,1
Common sole / Sole	SOL	28.406	27.509	29.575	31.942	30.191	-5,5	0,8
Megrims	LEZ	26.251	26.548	26.441	28.000	28.380	1,4	0,8
Anglerfish nei	ANF	56.222	61.348	63.193	63.474	60.556	-4,6	1,6
Penaeus shrimps	PEN	4.108	4.108	-	3.317	3.317	0,0	0,1
North deep prawn	PRA	25.187	23.362	21.924	20.722	16.736	-19,2	0,5
Norway lobster	NEP	79.348	73.884	77.042	76.767	73.789	-3,9	2,0
Atl. Redfish	RED	33.414	36.348	29.444	29.579	25.997	-12,1	0,7
Greenland halibut	GHL	17.706	17.601	17.355	16.329	14.147	-13,4	0,4
Atl. Halibut	HAL	1.150	1.075	1.150	1.275	250	-80,4	0,0
other species	OTH	6.110	6.110	5.350	5.350	6.850	28,0	0,2
Boarfish	BOR	-	-	-	-	82.000	-	2,2
Sandeels	SAN	346.920	346.920	354.380	58.923	264.124	348,3	7,2
Blue ling & ling	B/L	3.065	2.700	-	-	-	-	-
Blue ling	BLI	2.088	1.799	2.642	3.013	3.506	16,4	0,1
Ling	LIN	14.656	11.266	12.268	12.530	12.641	0,9	0,3
Flat fish	FLX	300	300	-	-	-	-	-
Capelin	CAP	-	-	56.364	56.364	5.775	-89,8	0,2
Catfish	CAT	-	-	-	-	-	-	-
Witch flunder	WIT	-	-	-	-	-	-	-
American plaice	PLA	-	-	-	-	-	-	-
Yellow tail flounder	YEL	-	-	-	-	340	-	0,0
Roundnose grenad.	RNG	9.974	9.388	8.313	7.709	9.190	19,2	0,3
Industry fish	I/F	800	800	800	800	800	0,0	0,0
Skates (NAFO)	SKA	-	-	-	5.352	4.408	-17,6	0,1
Turbot / Brill	T/B	5.263	4.737	4.642	4.642	4.642	0,0	0,1
Skates (ICES)	SRX	33.427	28.744	27.756	18.297	16.541	-9,6	0,5
Dab / Flunder	D/F	18.810	18.810	18.434	18.434	18.434	0,0	0,5
Lemon Sole/Witch Flunder	L/W	6.793	6.521	6.391	6.391	6.391	0,0	0,2
Northern blue fin tuna	BFT	11.907	7.087	5.748	5.756	7.936	37,9	0,2
Albacore	ALB	40.108	29.832	29.832	28.479	28.479	0,0	0,8
Bigeye tuna	BET	31.200	31.200	29.867	29.867	29.467	-1,3	0,8
Swordfish	SWO	13.949	15.274	14.315	13.737	13.528	-1,5	0,4
Picked dogfish	DGS	1.372	142	5	-	-	-	-
Black scabbardfish	BSF	10.635	10.192	10.432	9.944	11.108	11,7	0,3
Greater argentine	ARU	6.758	6.489	5.970	6.090	5.639	-7,4	0,2
Tusk (=Cusk)	USK	888	705	732	734	1.441	96,3	0,0
Orange roughy	ORY	97	-	1	-	-	-	-
Blackspot(=red)seabream	SBR	2.307	2.131	2.318	2.355	2.223	-5,6	0,1
Deep Sea Sharks	DWS	859	86	-	-	-	-	-
unserted species	VFF	-	-	-	-	-	-	-
Total:		3.583.631	3.481.145	3.235.386	3.173.451	3.675.442	15,8	100,0

Tab. 6.1 EU-Quota by species

Species	Code-name	EU (25)		EU (27)				
		2009	2010	2011	2012	2013 a)	Change 13/12	Quota '13 by species
		tonnes					%	%
of which: (COD, POK, POL, HAD, WHB, HKE, RED)		545.300	532.347	420.621	509.732	670.956	31,6	18,3

Notes: a) Preliminary figures.- b) Including red and white hake.-

Source: EU, TAC regulations.-
Published by: AIPCE 2014

Tab. 6.2 EU-Catches by quoted species

Species	Code-name	EU (25)		EU (27)				
		2009	2010	2011	2012	2013 a)	Change 13/12	Quota'13 by spec.
		tonnes					%	% b)
Herring	HER	582.794	449.570	536.298	662.693	709.716	7,1	86,9
Sprat	SPR	512.651	474.637	391.850	315.023	326.813	3,7	71,6
Anchovy	ANE	2.725	12.777	23.255	21.803	20.095	-7,8	70,9
Atl. Salmon	SAL	730	616	569	579	477	-17,7	77,9
Cod	COD	126.234	138.449	138.629	144.620	131.826	-8,8	66,8
Haddock	HAD	50.117	46.711	46.291	52.215	53.762	3,0	87,6
Saithe	POK	53.247	52.362	53.549	47.986	48.970	2,1	81,7
Pollack	POL	4.877	5.506	6.113	5.873	6.614	12,6	41,6
Norway pout	NOP	18.633	66.924	3.733	23.181	35.138	51,6	21,0
Blue whiting	WHB	84.145	82.278	14.528	68.850	117.205	70,2	52,8
Greater forkbeard	GFB	1.607	1.621	1.630	1.526	1.521	-0,4	61,1
Whiting	WHG	26.792	28.604	29.231	28.400	30.890	8,8	63,8
Hake c)	HKE	48.900	55.330	61.106	61.927	69.930	12,9	79,0
Jack&horse macke.	JAX	200.603	189.061	217.713	221.608	214.479	-3,2	80,2
Mackerel	MAC	417.164	404.280	354.521	251.978	232.189	-7,9	68,7
Europ. Plaice	PLE	64.655	75.136	77.214	81.981	88.272	7,7	76,5
Common sole / Sole	SOL	24.214	24.032	21.168	22.733	24.519	7,9	81,2
Megrims	LEZ	16.537	17.275	15.438	16.899	20.076	18,8	70,7
Anglerfish nei	ANF	41.229	43.893	41.988	45.447	49.143	8,1	81,2
Penaeus shrimps	PEN	1.019	944	681	715	662	-7,5	19,9
North deep prawn	PRA	14.332	10.747	27.990	9.057	8.893	-1,8	53,1
Norway lobster	NEP	62.242	58.107	37.555	51.978	45.074	-13,3	61,1
Atl. Redfish	RED	20.199	25.186	19.856	15.458	18.925	22,4	72,8
Greenland halibut	GHL	14.927	15.491	9.801	14.452	13.527	-6,4	95,6
Atl. Halibut	HAL	96	-	124	2	-	-	0,0
other species	OTH	4.937	5.226	4.649	5.063	6.039	19,3	88,2
Boarfish	BOR	-	-	-	-	69.795	-	85,1
Sandeels	SAN	326.666	331.372	329.715	5.052	249.432	4.837,3	94,4
Blue ling & ling	B/L	1.703	1.829	-	-	-	-	-
Blue ling	BLI	2.170	1.805	2.054	1.892	2.271	20,0	64,8
Ling	LIN	8.560	9.608	9.492	9.556	9.966	4,3	78,8
Flat fish	FLX	84	275	-	-	-	-	-
Capelin	CAP	-	-	11.324	-	-	-	-
Catfish	CAT	197	-	198	-	-	-	-
Witch flunder	WIT	420	405	542	492	265	-46,1	-
American plaice	PLA	762	817	905	1.024	898	-12,3	-
Yellow tail flounder	YEL	355	1.049	1.230	786	804	2,3	236,4
Roundnose grenad.	RNG	4.543	5.885	5.959	4.730	3.530	-25,4	38,4
Industry fish	I/F	621	725	689	747	177	-76,3	22,1
Skates (NAFO)	SKA	149	-	155	4.118	3.705	-10,0	84,0
Turbot / Brill	T/B	4.001	3.918	3.714	4.257	4.212	-1,1	90,7
Skates (ICES)	SRX	19.112	20.889	19.638	3.300	2.564	-22,3	15,5
Dab / Flunder	D/F	9.226	10.224	9.248	8.161	6.745	-17,3	36,6
Lemon Sole/Witch Flunder	L/W	2.595	2.515	3.100	2.866	3.114	8,6	48,7
Northern blue fin tuna	BFT	11.043	6.047	5.673	5.682	7.503	32,0	94,5
Albacore	ALB	18.957	15.122	16.041	18.424	18.736	1,7	65,8
Bigeye tuna	BET	12.282	9.707	19.882	17.307	15.082	-12,9	51,2
Swordfish	SWO	11.419	11.168	10.544	11.362	9.770	-14,0	72,2
Picked dogfish	DGS	1.244	263	15	14	11	-22,8	-
Black scabbardfish	BSF	8.646	7.716	8.030	6.615	6.557	-0,9	59,0
Greater argentine	ARU	1.827	2.998	3.062	2.360	2.292	-2,9	40,6
Tusk (=Cusk)	USK	479	435	464	371	544	46,6	37,8
Orange roughy	ORY	37	-	1	-	-	-	-
Blackspot(=red)seabream	SBR	1.412	1.146	888	1.009	963	-4,5	43,3
Deep Sea Sharks	DWS	793	165	56	12	5	-55,6	-
unserted species	VFF	94	-	143	-	-	-	-
Total:		2.845.003	2.730.846	2.598.242	2.282.184	2.693.692	18,0	73,3

Tab. 6.2 EU-Catches by quoted species

Species	Code-name	EU (25)		EU (27)				
		2009	2010	2011	2012	2013 a)	Change 13/12	Quota'13 by spec.
		tonnes					%	% b)
of which: (COD, POK, POL, HAD, WHB, HKE, RED)		387.719	405.822	340.072	396.929	447.232	12,7	66,7

Notes: a) Preliminary figures.- b) % of utilization of the quota.- c) Including red and white hake.-

Source: EU catch report
Published by: AIPCE 2014

Tab. 6.3 Overview of selected fish quotas in the world

Species	2009	2010	2011	2012	2013	2014
	1.000 tonnes					
Atlantic cod						
Barents Sea / Norway / Russia	525	607	703	751	1.000	1.014
Norway Coast	21	21	21	21	21	
Iceland	160	150	160	177	196	215
EU (27)	139	158	159	134 a)	167 a)	124
Pacific cod						
USA	218	228	293	326	321	319
Asia	135	135	125 b)	125 b)	125 b)	150 b)
Haddock						
Barents Sea	194	243	303	318	200	179
Iceland	93	63	50	45	36	38
EU (27)	61	52	51	61	60	57
Saithe						
Barents Sea	225	204	173	164	140	119
Iceland	65	50	50	52	50	57
Faroes	58	44	29 b)	<40 c)	<30 c)	<29 c)
EU (27)	83	71	60	50 a)	56 a)	54 a)
Alaska pollock						
Russia	1.441	1.652	1.620 b)	1.620 b)	1.600 b)	1.550 b)
USA	884	915	1.367	1.336	1.387	1.462
European hake						
EU (27)	65	64	66	67	69	98
Pacific hake						
USA/Canada	184	262	393	255	365	378

Note: a) Adjusted for Barents Sea share.- b) Estimate.- c) Advised limit.-
Source: EU, ICES, NMFS, NCMC, PFMC.-
Published by: AIPCE 2014

Tab. 7.1 Import of frozen fillets and meat of Alaska-pollock and hake from third countries into EU (27)

Average import price (€/KG; without duty) in 2011

Month	1	2	3	4	5	6	7	8	9	10	11	12
Alaska-Pollock												
Fillets a), frozen: Total import	2,39	2,38	2,40	2,28	2,14	2,17	2,13	2,15	2,07	2,21	2,15	2,18
from it: Germany	2,48	2,48	2,46	2,33	2,18	2,18	2,18	2,22	2,14	2,25	2,25	2,26
France	2,39	2,33	2,46	2,27	2,16	2,17	2,18	2,21	2,22	2,37	2,30	2,32
UK	2,42	2,33	2,25	2,24	2,20	2,26	2,24	2,22	2,14	2,20	2,14	2,34
NL	2,55	2,53	2,65	2,57	2,39	2,42	2,25	2,34	2,34	2,39	2,43	2,47
Spain	2,01	1,80	1,96	1,78	1,55	1,72	1,75	1,80	1,68	1,76	1,83	1,87
Denmark	2,45	2,83	2,93	2,64	2,62	2,44	2,70	2,52	2,46	2,54	2,49	2,51
Belgium	2,20	2,15	2,15	2,19	2,10	2,28	2,33	2,14	2,01	1,97	2,51	2,35
Sweden	2,65	2,62	2,57	2,35	2,38	2,43	2,29	2,40	2,45	2,59	2,58	2,58
Poland	1,84	1,83	1,67	1,71	1,56	1,67	1,60	1,51	1,40	1,74	1,48	1,54
Meat b), frozen: Total import	1,71	1,64	1,62	1,50	1,40	1,39	1,40	1,38	1,37	1,39	1,35	1,35
from it: Germany	1,62	1,67	1,63	1,51	1,37	1,35	1,33	1,33	1,32	1,32	1,29	1,28
France	1,70	1,59	1,65	1,44	1,40	1,38	1,28	1,35	1,21	1,35	1,28	1,36
UK	1,71	1,65	1,53	1,55	1,46	1,45	1,55	1,49	1,69	2,13	1,78	1,32
NL	2,00	2,13	-	1,48	1,41	1,45	1,46	1,39	1,66	-	1,30	1,50
Spain	-	1,68	1,74	1,54	1,62	1,50	1,63	1,57	1,50	1,57	1,46	1,60
Denmark	-	-	1,85	-	1,57	1,48	2,44	-	-	1,48	1,29	1,29
Poland	1,84	1,63	1,72	1,58	1,43	1,39	1,41	1,40	1,38	1,44	1,44	1,53
Hake												
Fillets c), frozen: Total import	2,98	2,95	3,02	3,08	3,20	3,18	3,16	3,22	3,16	3,06	3,23	3,18
from it: Germany	2,24	2,24	2,23	2,21	2,22	2,24	2,26	2,24	2,30	2,11	2,47	2,43
France	3,10	3,30	3,62	3,39	3,45	3,80	3,41	3,69	3,46	2,12	3,48	3,17
UK	3,71	3,48	2,80	3,04	3,17	3,14	3,04	3,05	3,68	3,03	3,61	3,61
NL	3,51	3,36	3,23	3,54	3,44	3,48	3,40	3,53	3,63	3,45	3,70	3,19
Spain	3,05	2,78	3,04	3,04	3,18	3,07	3,23	3,12	3,18	3,22	3,17	3,22
Poland	2,23	2,28	2,27	2,32	2,47	2,22	2,10	2,29	2,42	2,69	2,65	2,60
Italy	3,27	3,52	3,49	3,68	3,72	3,67	3,40	3,69	3,61	3,52	3,55	3,37
Meat d), frozen: Total import	1,89	1,81	1,91	2,21	1,82	1,92	1,69	2,08	1,94	2,11	2,30	2,36
from it: Germany	1,45	1,52	1,51	1,40	1,41	1,44	1,45	1,38	1,35	1,40	1,39	1,34
France	1,62	1,57	1,58	1,20	1,47	-	2,08	-	1,21	1,37	1,35	1,40
UK	1,23	2,36	-	-	1,21	1,79	1,11	1,39	2,16	1,15	2,67	-
NL	-	-	1,78	-	-	-	-	-	1,01	-	-	-
Spain	2,53	2,26	2,27	2,29	2,19	2,11	2,02	2,15	2,09	2,33	2,59	2,95
Poland	1,47	1,56	1,33	1,33	1,57	1,28	1,28	1,25	-	-	-	-
Italy	2,51	3,58	4,03	3,80	1,58	2,64	2,03	3,17	2,97	3,91	3,31	1,95

Note: a) CN: 03042985 (pinbone in and boneless).- b) CN: 03049975.- c) CN: 03042955, 03042956 and 03042958 (pinbone in and boneless).- d) CN: 03049951.-
Source: Eurostat-Comext; Published by: AIPCE 2014

Tab. 7.2 Import of frozen fillets and meat of Alaska-pollock and hake from third countries into EU (27)

Average import price (€/KG; without duty) in 2012

Month	1	2	3	4	5	6	7	8	9	10	11	12
Alaska-Pollock												
Fillets a), frozen: Total import	2,30	2,35	2,29	2,31	2,29	2,38	2,36	2,40	2,36	2,30	2,26	2,27
from it: Germany	2,35	2,41	2,37	2,30	2,29	2,37	2,35	2,41	2,38	2,35	2,34	2,37
France	2,36	2,42	2,36	2,39	2,32	2,44	2,35	2,52	2,42	2,40	2,40	2,30
UK	2,39	2,35	2,38	2,40	2,31	2,48	2,51	2,58	2,37	2,31	2,31	2,26
NL	2,46	2,53	2,39	2,49	2,51	2,56	2,52	2,62	2,69	2,57	2,69	2,62
Spain	1,75	1,91	1,72	1,78	1,87	1,88	1,95	2,00	1,91	1,82	1,81	1,79
Denmark	2,74	2,70	2,62	2,64	2,69	2,69	2,72	2,94	2,82	2,66	2,91	3,04
Belgium	2,33	2,33	1,79	2,06	2,10	2,11	2,27	2,23	2,00	2,13	2,03	2,18
Sweden	2,70	2,60	2,47	2,45	2,57	2,72	2,78	2,74	2,31	2,74	2,85	2,63
Poland	1,74	1,77	1,65	1,84	1,92	2,20	2,03	1,96	1,85	1,73	1,61	1,47
Meat b), frozen: Total import	1,67	1,51	1,40	1,57	1,54	1,52	1,58	1,60	1,54	1,50	1,51	1,51
from it: Germany	1,29	1,30	1,32	1,32	1,36	1,50	1,43	1,45	1,45	1,38	1,50	1,36
France	1,40	1,40	1,33	1,79	1,62	1,51	1,64	1,68	1,60	1,52	1,48	1,48
UK	2,07	1,60	1,61	1,48	1,64	1,58	1,62	1,75	1,83	1,68	1,75	1,61
NL	2,48	1,75	1,52	1,50	2,17	1,57	1,43	-	1,57	1,46	1,42	1,42
Spain	1,66	1,77	1,63	1,60	1,84	1,54	1,47	2,02	1,50	1,47	1,48	1,97
Denmark	-	1,33	1,53	1,29	-	1,56	-	-	-	1,58	1,51	1,58
Poland	1,56	1,60	1,52	1,45	1,36	1,52	1,49	1,55	1,46	1,48	1,51	1,56
Hake												
Fillets c), frozen: Total import	3,08	3,15	3,21	3,43	3,38	3,41	3,32	3,30	3,30	3,27	3,23	3,44
from it: Germany	2,34	2,40	2,39	2,43	2,52	2,69	2,53	2,47	2,60	2,35	2,70	2,54
France	3,43	3,61	3,10	3,70	3,84	3,83	3,85	4,02	3,58	3,61	3,93	3,81
UK	2,97	3,12	3,69	3,95	3,29	3,45	3,24	3,29	2,28	3,22	2,88	3,27
NL	3,38	3,70	3,56	3,69	3,60	3,62	3,60	3,38	3,72	3,45	3,57	2,98
Spain	3,13	3,23	3,36	3,30	3,21	3,24	3,15	3,20	3,23	3,21	3,00	3,28
Poland	2,54	2,71	2,67	2,62	2,61	2,74	2,62	2,58	2,53	2,52	2,62	2,72
Italy	3,65	3,20	3,40	4,27	4,06	4,07	3,69	3,67	3,73	3,76	3,76	4,02
Meat d), frozen: Total import	1,67	1,75	1,95	1,94	2,34	2,51	2,15	2,26	2,26	2,06	1,90	2,08
from it: Germany	1,35	1,38	1,39	1,35	1,53	1,42	1,46	1,47	1,48	1,42	1,36	1,41
France	1,38	1,40	1,68	1,25	3,62	1,45	1,14	-	1,60	1,44	1,42	1,33
UK	-	1,85	-	2,13	-	2,17	0,94	2,37	-	2,14	-	-
NL	-	-	-	-	0,65	-	2,91	1,65	-	-	1,51	-
Spain	2,22	2,24	2,34	2,47	2,45	3,01	2,40	2,54	2,70	2,30	2,41	2,60
Poland	1,41	1,43	1,41	1,37	1,34	1,44	1,44	1,53	1,32	1,29	1,41	1,27
Italy	-	-	2,31	3,37	-	2,27	2,42	3,26	1,45	2,56	1,39	2,55

Note: a) CN: 03047500 (pinbone in and boneless).- b) CN: 03049490.- c) CN: 03047411, 03047415 and 03047419 (pinbone in and boneless).- d) CN: 03049550.-
Source: Eurostat-Comext; Published by: AIPCE 2014

Tab. 7.3 Import of frozen fillets and meat of Alaska-pollock and hake from third countries into EU (27)

Average import price (€/KG; without duty) in 2013

Month	1	2	3	4	5	6	7	8	9	10	11	12
Alaska-Pollock												
Fillets a), frozen: Total import	2,23	2,23	2,22	2,27	2,28	2,26	2,23	2,21	2,19	2,13	2,12	2,06
from it: Germany	2,27	2,27	2,30	2,28	2,26	2,25	2,24	2,23	2,22	2,22	2,17	2,13
France	2,27	2,27	2,29	2,43	2,32	2,34	2,25	2,28	2,30	2,28	2,25	2,22
UK	2,32	2,27	2,40	2,36	2,35	2,35	2,27	2,32	2,28	2,21	2,23	2,20
NL	2,65	2,53	2,58	2,68	2,47	2,45	2,39	2,40	2,40	2,33	2,34	2,18
Spain	1,80	1,72	1,64	1,75	1,63	1,87	1,72	1,70	1,72	1,74	1,68	1,80
Denmark	2,89	2,84	2,90	2,94	2,73	2,77	2,78	2,81	2,60	2,67	2,44	2,20
Belgium	2,09	2,00	2,32	2,29	2,18	2,27	2,06	2,08	2,17	2,09	2,08	1,94
Sweden	2,52	2,56	2,65	2,63	2,62	2,69	2,59	2,50	2,36	2,45	2,47	2,63
Poland	1,79	1,71	1,64	1,77	1,96	1,84	1,81	1,70	1,77	1,56	1,46	1,56
Meat b), frozen: Total import	1,45	1,46	1,44	1,43	1,43	1,39	1,40	1,35	1,35	1,39	1,29	1,31
from it: Germany	1,37	1,44	1,39	1,29	1,31	1,27	1,28	1,24	1,26	1,29	1,25	1,27
France	1,46	1,35	1,46	1,47	1,43	1,37	1,28	1,32	1,29	1,32	1,22	1,28
UK	1,55	1,50	1,54	1,59	1,84	1,55	1,56	1,41	1,58	1,75	1,41	1,49
NL	1,43	1,39	1,28	1,30	1,69	1,32	1,44	1,29	1,26	1,43	1,28	1,47
Spain	1,34	1,39	1,46	-	-	-	1,81	-	1,34	1,40	-	1,34
Denmark	1,52	1,58	1,37	1,40	-	1,40	1,91	1,90	1,38	-	1,00	-
Poland	1,42	1,46	1,46	1,41	1,32	1,33	1,31	1,27	1,29	1,31	1,26	1,26
Hake												
Fillets c), frozen: Total import	3,15	3,31	3,35	3,33	3,35	3,48	3,28	3,27	3,25	3,19	3,17	3,63
from it: Germany	2,39	2,53	2,53	2,52	2,75	2,48	2,52	2,46	2,49	2,23	2,25	2,45
France	3,59	3,53	3,86	3,79	3,84	3,96	4,04	3,87	3,75	4,05	3,94	3,88
UK	3,22	4,16	2,93	3,04	2,93	3,31	2,79	3,52	3,24	2,91	2,99	3,41
NL	3,64	3,62	3,99	3,65	3,58	3,75	3,52	3,64	3,53	3,84	3,64	3,23
Spain	3,05	3,24	3,21	3,31	3,20	3,30	3,17	3,15	3,12	3,08	3,12	2,93
Poland	2,52	2,60	2,20	2,24	2,40	2,67	2,79	2,48	2,41	2,37	2,40	2,52
Italy	3,49	3,68	3,74	3,80	3,84	3,97	3,62	3,80	3,73	3,78	3,83	7,13
Meat d), frozen: Total import	1,93	2,04	1,78	2,03	2,24	2,13	2,24	1,95	2,11	2,03	2,08	1,92
from it: Germany	1,31	1,34	1,33	1,34	1,40	1,36	1,29	1,25	1,54	1,32	1,25	1,79
France	1,39	1,09	1,45	-	-	-	-	-	-	-	0,70	-
UK	-	-	2,04	-	-	-	2,03	2,08	-	-	-	-
NL	3,09	-	-	-	2,98	-	-	-	-	1,46	3,01	1,22
Spain	2,07	2,27	1,86	2,32	2,32	2,33	2,43	2,36	2,29	2,34	2,18	2,00
Poland	1,33	1,29	1,31	1,33	1,22	-	1,28	1,23	-	1,17	-	1,24
Italy	-	2,55	3,14	1,93	3,46	1,44	2,23	1,40	-	1,75	1,60	-

Note: a) CN: 03047500 (pinbone in and boneless).- b) CN: 03049490.- c) CN: 03047411, 03047415 and 03047419 (pinbone in and boneless).- d) CN: 03049550.-
Source: Eurostat-Comext; Published by: AIPCE 2014