FINFISH STUDY 2015

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

EU Fish Processors and Traders Association

Brussels October 2015

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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, 120,000 jobs and 27 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.

There are other publications and databases that go into more detail about individual 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 has always been on a global stage and in fact 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 world of fish is extremely dynamic and managing all of the consequences that arise whether from wild capture and cultivated fisheries is always a challenge and AIPCE-CEP is constantly responding 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

To ensure consistency and the ability to make a common comparison 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 14.4 million t up 1.7 %;**
- **Imported stable at 63 % (9.1 million t);**
- **Whitefish dependency unmoved at 89 % for wild capture species;**
- **EU catches for whitefish species have increased marginally (+1 %) and quota utilisation has marginally improved as well;**
- **Exports expand by 8 %;**
- **Tuna, salmon and cod main three species and all increased in 2014 to around 1.3 million t each WFE;**
- **Supply for per capita consumption is up by 0.1 kg at WFE.**

2.1 Data Base

This report is mainly based on statistics taken from Eurostat 2014 data and refers to the EU28 group who were member states at the beginning of the year. 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 as a result of late reporting or other issues. We will make corrections retrospectively and restate previous year's numbers.

Normally these are minor adjustments and do not affect the underlying accuracy of the statistics. To maintain consistency we backdate any such adjustments to 2013, which allows us to keep the comparison since EU28 was created.

Our final database check are the FAO figures, which are now incorporated for the latest release of statistics from 2012.

The main focus of the Finfish Study is wild capture whitefish to which we have added some commentary about freshwater cultivated species like pangasius and tilapia and new data for sea bream and sea bass. We recognise that the fish industry is far more diverse than this and we are adding data about shellfish, cephalopods, large and small pelagics, other cultivated species as well as imported prepared products.

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 2014 fish consumption in Europe appears to have sustained some growth by a relatively modest 0.7 % to 12.269 million t WFE. This is below historical peaks but above the average since 2006 when EU27 was formed.

We will look at the individual species in more detail in later chapters but the summation says that the EU has caught and cultivated a little more, imports are up and so are exports.

Reliance on imports remains stable at just above 63 %.

Per capita consumption has moved up very marginally to 24.4 kg.

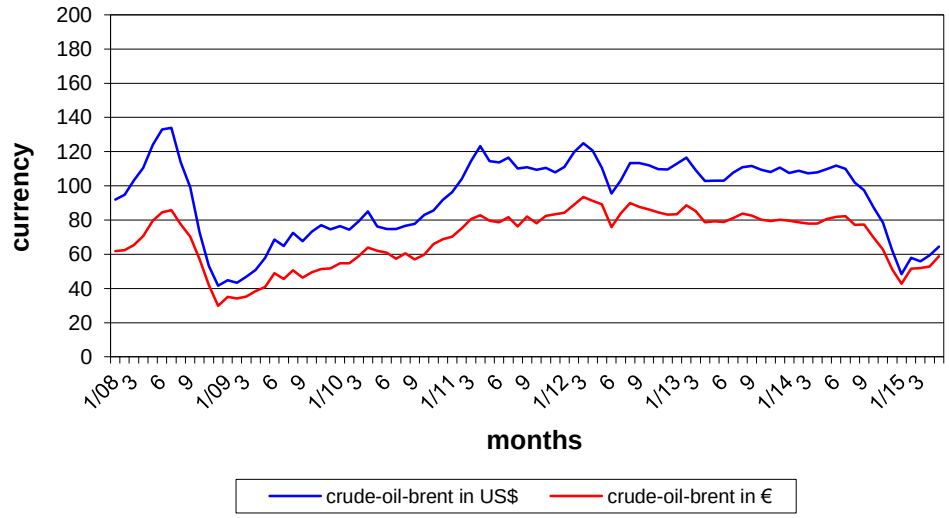
2.3 Costs

During 2014 the $/€ fluctuated in a range from 1.36 -1.23 with the € at its strongest in the first half of the year. In particular the last quarter then saw the beginning of a trend for weakness that has carried on into 2015 when the € has touched long terms lows against several other major currencies. As contracts for supply and processing of fish tend to be concluded more than a quarter in advance this weakening in the latter part of 2014 probably had limited impact in that calendar year.

Other key currencies to fish trading, notably the Japanese Yen remained stable against the € throughout 2014 moving in a range of 135-145.

After an extended period oil prices finally dropped below the $100/barrel mark in the last quarter of 2014 progressively reducing to around 2/3rds of that level by end of the year. For the fishing sector this change will provide some welcome relief.

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



2.4 Regulatory Review

Summary

After the extensive consultation over the CFP and CMO reforms of the last few years we have begun to operate under the new agreements. There was also the implementation of the Food Information Regulation in December 2014.

In respect of the IUU regulation the European Commission continue to use their system of "yellow cards" to encourage exporting countries to address shortcomings in their performance. There has also been issuing of “red cards” that is resulting in prohibition of imports from certain countries. Processors take seriously their responsibilities to ensure that IUU fish does not enter their supply chains and we continue to work closely with the European Commission, member state authorities and other stakeholders to deter and eliminate IUU fish.

We will come back to commenting about these regulations in future versions of the Finfish Study as the consequences and impacts become clearer.

For AIPCE-CEP the most relevant regulatory work currently under way is the triennial review of Autonomous Tariff Quotas (ATQ). During this Study you will see reference to the individual items affected by this and how the trade volumes in 2014 are affected.

Below we outline the AIPCE-CEP position regarding the Tariff Regulation.

Tariff Regulations

As this and previous Finfish Studies have made clear, EU processors’ reliance on imported fish has stayed at 63-65 % every year across the market and for certain key species and sectors this reliance is frequently above 90 %. Many products essential to the consumer could not exist without such imports. This is not a question of market management but a simple reflection of the inability of the EU fishing and aquaculture sector to meet consumer demand in terms of both volume and variety of products.

As consistent proponents for change, we welcome the laudable efforts to achieve improvement in the state of EU stocks and the management principles applied. But even if the principle of fully sustainable and productive stocks is reached (MSY) this will still fall well short of the market demand and make very limited impact to self-sufficiency potential. This is not a new phenomenon since Europe's distant water fleets have always fished in what are now other countries' waters (e.g. Iceland).

On December 3rd 2012 the Commission published the new Tariff Regulation 1220/2012 that provided for a system of ATQs across a range of fishery commodities based on a triennial cycle. This regulation amalgamated three other regulations with suspensions and ATQs and was intended to simplify the process of preferential tariff arrangements applicable to fish products. At the time we were disappointed to see the loss of a system of suspensions that had functioned well for many years and that gave certainty around market access and competitiveness. However, after considerable negotiations we were able to arrive at ATQ levels that maintained the previous benefits and through adoption of certain protective measures we have been able to safeguard the industry on the products previously subject to tariff suspension and that form the key component raw material of many businesses.

The current round runs out at the end of 2015 and we are actively involved in the negotiations for a new round of ATQs which takes into account our views of the future and the trends in global as well as European seafood trade.

Ultimately processors need certainty before making decisions of large financial investments and confidence in being able to recoup their outlay. Our view is that the ATQ system can deliver this even with the triennial review provided all parties use fact based arguments and seek clarity of each other's views.

In the last two years since the regulation 1220/2012 has been in force there has been considerable activity by the European Commission in reviewing several other important tariff matters. Specifically the GSP and GSP+ review has the potential for impact on several countries with significant fish trade with the EU. Additionally the opening of a number of Free Trade negotiations can have long term effects not forgetting that the current EEA arrangements are also still under review.

We believe that the current status and potential impacts of these processes are uncertain and it is not possible to adequately meet the need for predictability and certainty processors require. Consequently, we think it completely inappropriate to bring such issues into the 2016-18 review unless it can be clearly demonstrated that such arrangements will not distort trade flows.

Free Trade Agreements

In reference to the Free Trade Agreements (FTA) mentioned above there has been some progress since our last study either because agreement has been reached or negotiations have moved on.

Whilst fish is an important element of global trade it rarely dominates the trade between the EU and other countries and regions. Having said that there are important species and products that will be affected by the FTAs as they come into force.

Of most relevance to fish for FTAs close to agreement in 2014 are Canada and Vietnam. AIPCE-CEP have provided opinion about the consequences these may have to trade in fish and we await the more detailed responses to how these FTAs will handle the specific issues around fish products affected.

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.

Prior to 2009, we used the official conversion factors of the German government as the basis of our calculations for the use of fish resources. Although such official data enables consistency it did not in our opinion sufficiently recognise differences in regional processing and product formats that in some instances have become significant in the market.

So we have adjusted our methodology since then by the adopting of our own set of conversion factors based on actual processing yields gleaned from the experience of AIPCE-CEP members (see tab. 4.19). We believe in taking this approach we are more accurately reflecting the differences between major processing methodologies both technically and regionally around the world and this allows us to assess more realistically how much of the global resources are used in the EU market.

Naturally this can put us at odds with the findings of other publications that use 'official conversion factors' but we believe is more reflective of our industry.

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 (as there is using official conversion factors) but we believe the results are justified by portraying a more accurate picture in today's global supply network.

In particular it has helped demonstrate that improved utilisation of fish after 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 EU28 up to and including 2014.

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 2014, we calculate this at 63 % for EU28.

In absolute terms, the sum of all imports (at WFE) has increased by 185,000 t (2.1 %) to 9.11 million t). This is above the average since 2006 (9.00 million t) and it is extremely encouraging for the industry that we appear to have entered a period of sustained growth again in the EU market.

Traditionally we have used this study to focus on the trade in the seven key whitefish species (cod, haddock, redfish, saithe & hake. Non-EU additions are Alaska-pollock and hoki.) 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 are going through very 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. For the first time this year we have also added data for Sea Bass and Sea Bream.

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.

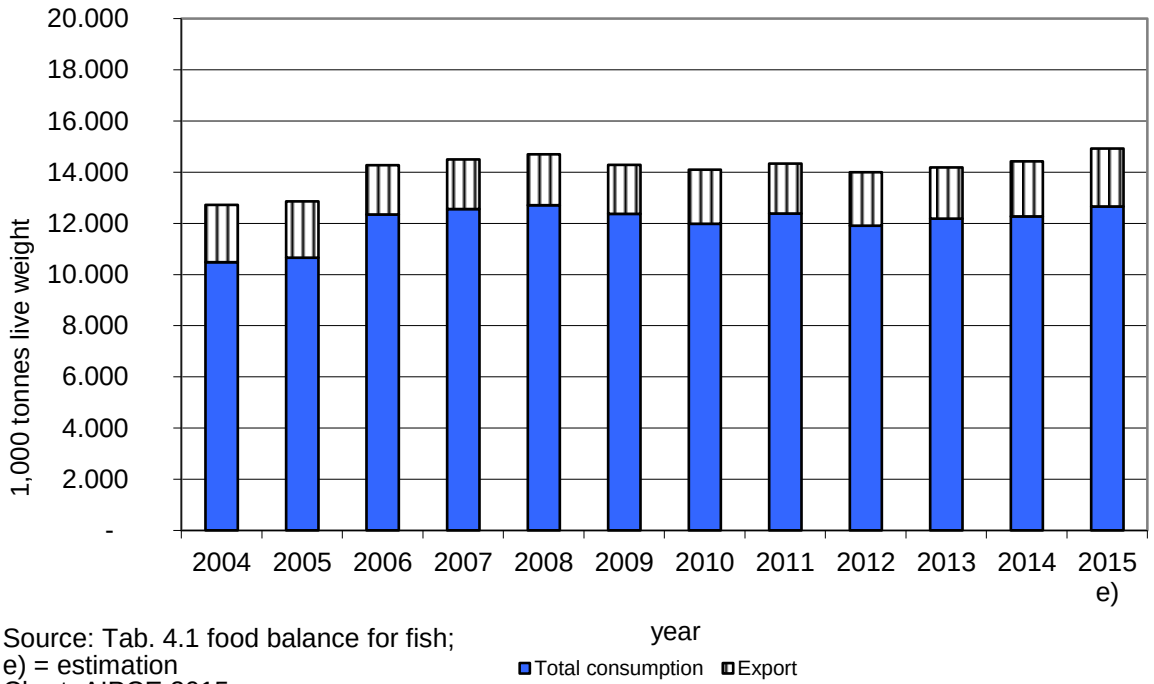
Beyond the whitefish sector the continuous development of these other categories of fish such as salmon, shellfish and tuna has become very important and they have been essential to opening up choice for EU consumer. The EU industry typically represented by organisations such as AIPCE-CEP has grasped 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 resolving issues take time, effort and resources if they are to find long-term solution and not just short-term responses.

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 241,000 t to a level of 14.43 million t (food use) that sees a recovery close to the high levels of 2007/8. Should the early indications for 2015 be consolidated then we are on the cusp of the supply of fish into the EU being at the highest levels we have seen in the era of publishing the Finfish Study.

Fig. 4.1 A Actual supply for consumption and export
(from 2004-2005 EU [25], from 2006-2012 EU [27], from 2013 EU [28])



Source: Tab. 4.1 food balance for fish;
e) = estimation
Chart: AIPCE 2015

This 14.43 million t of supply is broken down as follows:

- EU national landings of 5.04 million t less 0.99 million t for non-direct food use gives a net 4.05 million t for human consumption representing an increase of 43,000 t (1.1 %) since 2013;

- EU aquaculture is estimated to have generated 1.264 million t (+13,000 t) – a very modest growth of 1 % and raising the average since 2006.

Net EU domestic supply for food use amounts to 5.318 million t an encouraging increase of 1.1 %.

The proportion of this material that goes for export outside of the EU we estimate to be 40 % reflecting preference for certain species in other markets. At live weight level we calculate this to be equivalent to 2.16 million t which is the highest figure since EU27/8 was formed.

Imported materials comprised of 9.112 million t an increase of 185,000 t or 2.1 %.

The result of all this is that we see a net consumption total of 12.269 million t in 2014, which is an increase of 82,000 t, or 0.7 % over 2013.

This is still below the peaks since EU27 was formed in 2006 by 400,000 t but is close to the average over the period.

Attracting new consumers into the sector and also bringing back those who may have been less active in recent years has been a challenge to the industry but these recent figures suggest this is happening more successfully. We see the opportunity to continue building on this momentum and move on to further growth. This longer-term recovery will be important for employment and economic prospects and it is essential that unnecessary barriers that could disrupt this recovery and inhibit development opportunities or not put in the way.

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 66,000 t (2.2 %);
- Freshwater species (mainly aquaculture) down by 64,400 t (-9.6 %);
- Salmon up by 105,000 t (+8.2%);
- Surimi base and products up marginally by 3,800 t (1.4 %);
- Tuna up 21,100 t (+1.7 %);
- Small pelagics up by 43,400 t (+2.8 %);
- Shrimp up by 22,400 t (+2.6 %);
- Cephalopods up by 29,500 t (+6.2 %).

A subsequent chapter goes into much more detail about each of these.

Altogether these items total to an addition of 231,800 t to the available supply in the EU last year which accounts for virtually all of the change of 241,000 t.
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 second successive year of increase although very modest. The total for all species is up by 0.5 % or 13,000 t. As always there are several species with notable swings – Blue whiting and sprats being the two species with the largest increase.

In the whitefish grouping haddock and saithe each fell back in line with quota cuts of 15 % but hake improved 22 %. Cod was also better by 1.9 %.

Industrial species (i.e. non-food use) were a mixed bag declining by 3.0 % in our grouping.

The direct food use part of domestically caught has increased by 43,000 t (+1.1 %), still some way behind its potential but continuing a trend of improved quota utilisation.

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

- Wild capture whitefish expansion (key 7 species) of 3,343 t (+0.9 %);
- Tuna up by 4,000 t;
- Small pelagics - herring up 5,056 t (0.7 %) and mackerel up by 226,975 t (+61 %).

4.3 Levels of Sufficiency

The total supply available of fish for food use in the EU27 we have calculated as 14.430 million t and that the net consumption was 12.269 million t in 2014 then the levels of reliance and self-sufficiency can be calculated as follows:

- If all EU catches and cultivated fish were retained in the EU this would represent 43.7 % of the total available supply;

- However, we need to adjust this for exports that represent an important element of fish trade so this reduces to 36.9 %. (These are a mixture of products that are more accepted in other markets and/or are traded at higher prices externally to the EU28);

- After making this adjustment we can calculate that the EU fisheries and aquaculture provide 25.7 % of the fish consumed in EU28;

- The difference is made up from imports and re-stating these figures the other way round it means that imports represent 63 % of all available supply and 74 % of consumption.

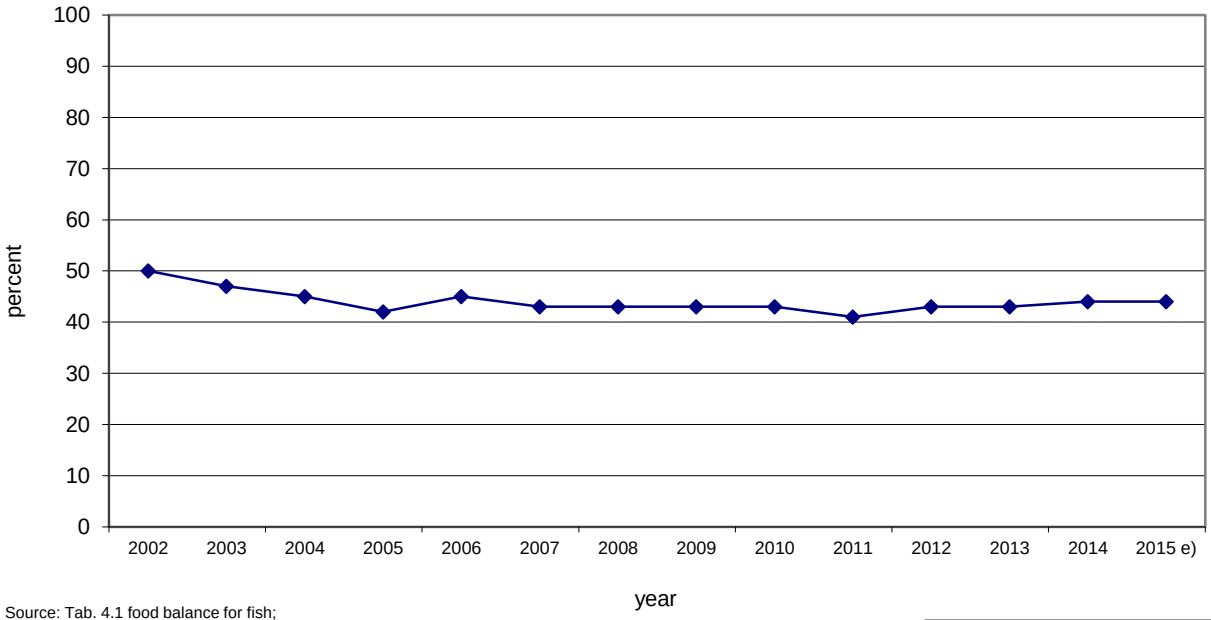
Ever since the publication of the Finfish Study commenced over 20 years ago this point has consistently been made. The need for imported materials is fundamental to the industry and the consumer in the EU.

Last year's figure of 63.1 % has barely changed since the extension of the EU to 27 member states in 2006 – operating within a band of only +/- 1 %. The addition of member state no. 28 last year has no material impact to this figure.

Even if we take the most optimistic calculation for self-sufficiency in the EU and assumed the 2.161 million t of exports were retained and could displace an equal amount of imports the level of self-sufficiency only gets to 43.4 % against last year's consumption of 12.269 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), from 2013 EU (28)



Source: Tab. 4.1 food balance for fish;
e) = estimation.- Chart: AIPCE 2015

4.4 Consumption

When taken at per capita level (WFE) the total supply appears to have reached just below 29 kg.

Taken to net consumption level this has shown increase from 2013 to 24.4 kg and confirms our opinion that the unusually low number in 2012 was an anomaly and that fish consumption across the EU is now back to historical levels and exhibiting strong potential for growth again.

This is important to emphasise as we enter an era of improved availability of many species from both wild capture and aquaculture.

It consolidates the EU trading block as the most important in global terms when it comes to trade and consumption and it is paramount that the opportunity to build on this momentum is available to all participants.

4.5 Data Comments

Our data is based on Eurostat figures for trade flows. EU member state data submissions are nearly all completed at the time of writing but where there are gaps we may make minor adjustments using knowledge from within the AIPCE-CEP membership.

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 2012 data, so we are careful when backdating these and considering anything meaningful in the commentary.

4.6 Wild Captured Whitefish Supply

This study has always featured Whitefish species as its core content.

Once again the total supply of wild capture whitefish has increased (by 66,000 t) to 3.027 million t in 2014 from the previous year (see tables 4.2 and 4.3).

This is something of a milestone as it shows the breaching of the 3 million t level for the first time since the EU27 was formed.

The rate of expansion of 2.2 % may be slower than in 2013 but the importance of the whitefish sector continues to grow and this is particularly relevant to the EU fish processing sector as whitefish provides a disproportionately higher level of value adding and employment compared to other sectors.

Imports continue to dominate their share of this sector and their contribution remains at 89 %. However, domestic EU landings have increased by 1 % within the year so adding 3,343 t (but still only just edging share above 11 %).

Key drivers that we believe are behind this are:

- Stability or even slight expansion for quota in major whitefish species most especially cod and Alaska-pollock against already very positive quota developments brought forward from 2013.

  Some of this will have been offset by reductions in saithe and haddock but as part of the whitefish complex these collectively form a smaller part.

- Relative price stability during 2014 (albeit that the latter stages of the year saw much greater turmoil).

- Competition from other regions remains intense but trade restrictions may have been having some influence. For example exporting to Nigeria has been on and off as import quotas for short periods have limited product flows. Also since August 7th 2014 an embargo on imports of food products, including some fish, into Russia has perhaps disrupted activity in a number of species.

  These measures have had varying impacts but certain groups of EU fishermen have faced real challenges as a consequence.

  Whilst we believe many of these measures are of a temporary nature that period of uncertainty can be relatively long perhaps extending over several years and ultimately re-defining markets.

  We have shared our opinion in the past that food security is a strategic policy development for several populous regions and countries that can be expected in the longer term to increase consumption and competition for food fish resources.

  For sure the impact of trade restrictions that we are seeing at the moment appear to contradict this but there continues to be efforts to reduce tariff barriers and create easier trade mechanisms between other trading blocs and we must remain vigilant to the potential impact these measures could have on EU fish trade.

  Fish remains one of the most important commodities in all global trade often exceeding the values of other staples.

  Any increase in the bureaucratic burden for both the supplier country and recipient will quickly result in disruption and change of trade flow as a natural reaction but such changes can also become permanent in an adverse way.

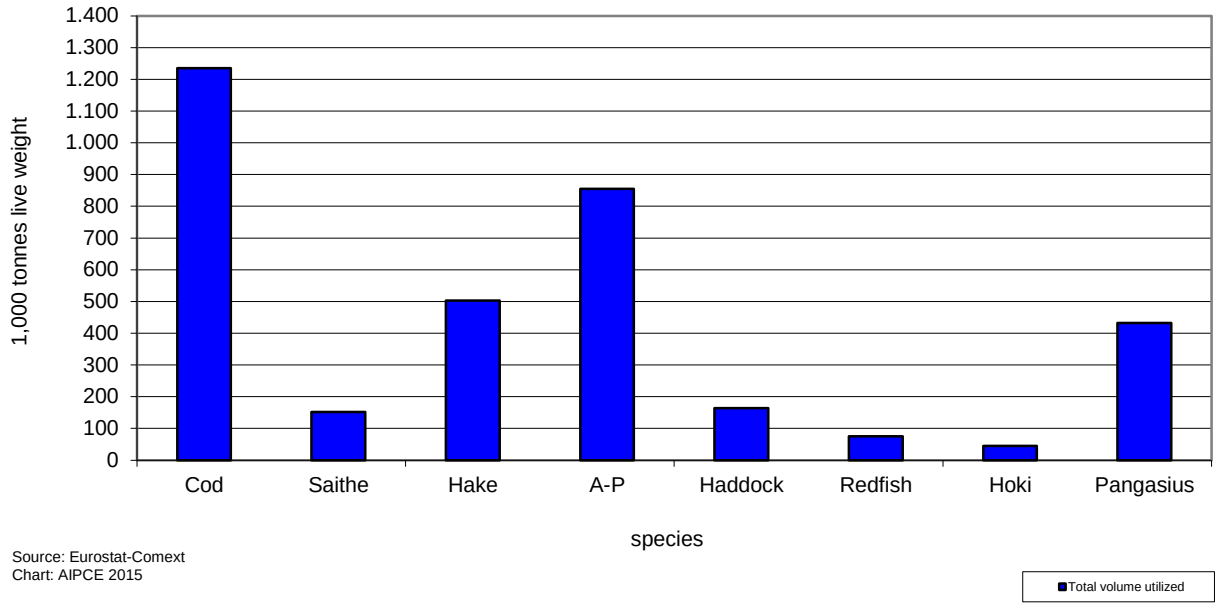
AIPCE-CEP were pleased to see the adoption of a new EU tariff regulation in 2013 and we believe this has been helpful in encouraging trade and inward investment. We are encouraged that the views of the European processing and trading sector were taken into account and there is recognition of the imbalance of availability in several key species. Now we are in the final year of the three year cycle of the current agreement and it is clear that for several important raw materials the quantity of material subject to tariff relief is well below the market needs. Additionally growth has occurred that will result in stretching some of the items beyond their current limits during the term of the next three year cycle (2016-2018) unless some accommodation for expansion is made. Of course we also recognise that some items have not been fully utilised and it may be necessary to review those arrangements as well.

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

Fish consumption has a long tradition in the EU and it is no surprise that there continues to be a significant skewing of certain species to certain markets based on that tradition and preference (e.g. haddock in the UK) as well as preferred product formats (e.g. salted cod in Portugal). We are also seeing that markets can change. Chilled fish sales are an example of a trade channel that has been strong in several EU member states for many years but much slower to develop in others. However, logistics investment and the ability to scale up by piggy-backing seemingly minor products on the back of more successful items is now beginning to open up some of the smaller or more geographically diverse regions. To some extent this becomes self-fuelling as the efficiencies improve further and technology becomes more affordable.

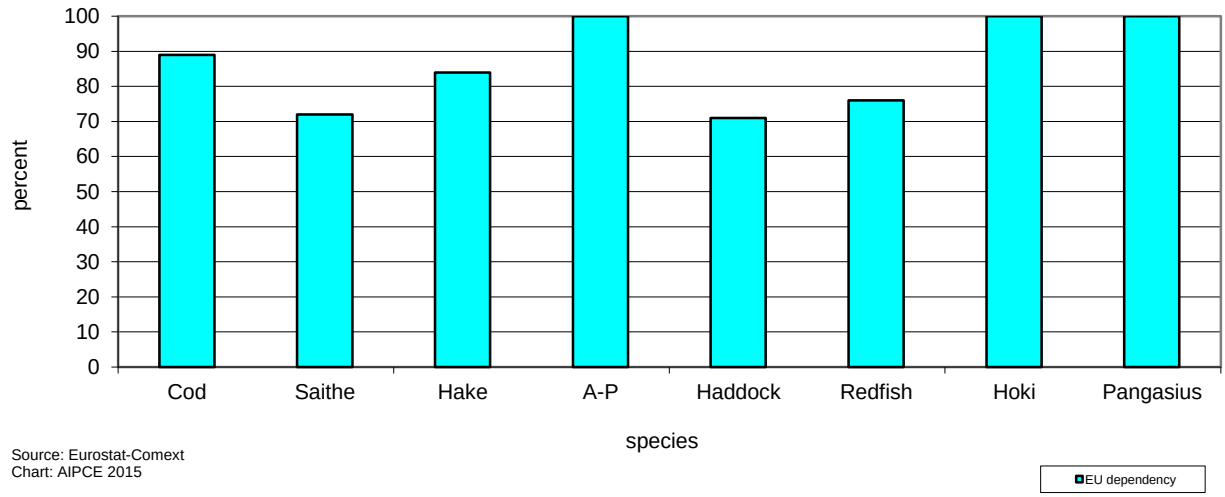
The graph below shows the relative importance of each of these seven wild capture species (at WFE) with the addition of a farmed pangasius (separately discussed later in this chapter). The second graph shows the level of import dependency we have for each species.

Fig. 4.2 A Total volumes utilized by key wild captured whitefish species and pangasius for 2014
EU (28)



Source: Eurostat-Comext
Chart: AIPCE 2015

Fig. 4.2 B Import dependency by key wild captured whitefish species and pangasius for 2014
EU (28)



Source: Eurostat-Comext
Chart: AIPCE 2015

Species Commentary:

- **Cod** continues to surge ahead as the No 1 preferred whitefish species in the EU and has again seen substantial growth to 1.235 million t (WFE) in 2014 – up by 7.2 %!

  That takes it share of wild capture whitefish to more than 40 % in Europe.

  Note that cod includes the three key species – Atlantic (morhua), Pacific (macrocephalus) and a small amount of Greenlandic (ogac).

  Atlantic cod by far dominates the activity.

Encouragingly we believe that EU catches have expanded by 2,600 t (+1.9 %) and quota utilisation whilst still well below its potential has improved to greater than 70 % once again. This underperformance is primarily in the Eastern Baltic fishery where quota uptake has been low for several years. There are promising indications that this may be changing as both environmental conditions and fish condition appear to be improving.

Imports again grew strongly by 80,301 t or 8 % on the back of the maintained high quota level from the Barents Sea coupled with a carry-over of stock at the beginning of the year. The market has certainly been able to adapt to the opportunity created by this positive development in supply because this species remains so well accepted in the EU market.

Mince was the weakest category dropping back 13 %. Nearly all of that is accounted for by Pacific cod mince which saw a two thirds decline in arrivals into Europe during the year.

Following the strong growth in imports of whole fish in 2013 it seems that momentum has been maintained. Fresh whole was up 22 % to a WFE of 74,808 t entirely ascribable to Norwegian supply. Similarly whole frozen volume is up by 28 % based on the improvement in arrivals from the Barents Sea fishery activity. Although quotas did not increase in 2014 the legacy of the 33 % addition in 2013 meant that delayed fishing saw large carryover stocks in Norway and Russia hitting the market in the first quarter of 2014.

As a consequence of the better supply of Atlantic cod it does appear that Pacific cod is suffering as the imports from USA of this species showed a decline of 18 % adding to the 6 % decline of the previous year.

Partially prepared products have also increased but not as dramatically – fresh fillets held their own at the elevated levels achieved in 2013 and frozen fillet presentations were up 9 % to and WFE of 379,080 t.

Perhaps it was a little surprising that volumes of preparations used in the salted and dried market saw slippage of 3 % in 2014. This is an important sector for utilisation of cod resources accounting for nearly 30 % of all use so any change is meaningful.

When looking at the split between supply countries we see the consequences of the events triggered by the major increases to several North Atlantic quotas coming to fruition. As mentioned earlier there was very late fishing in 2013 in the Barents Sea that resulted in sales of that fish being delayed until 2014 so explaining the advance of close to 30 % in volumes of whole fish from the nations fishing in that region - Norway, Russia and in this year the Faroes.

The fishing year in Iceland starts September 1st so the 10 % increase for 2013/14 allowed extra volume to come to the market in first half of last year. The 2014/15 quota level was unchanged so this left stability in the last quarter.

Iceland continues to specialise in the fresh fillet sector where it has 75 % share of the EU supply. 2014 saw a very slight decline of 1% in their volume.

Slightly surprisingly given the increase in supply of cod and some shifting within that towards bigger fish both Iceland and Norway saw a slight reversal to the volumes of salted and dried products during 2014. As mentioned earlier this use of cod is extremely important and has consistently represented the biggest use when converted back to WFE. 2014 has changed that and the sector is now smaller than the frozen fillet format in import terms (WFE).

It may be that the increase in availability from enlarged quotas and bigger fish has seen some shift of production towards EU processors in Southern Europe – explaining part of the use of the greater imports of both whole fresh and whole frozen cod mentioned earlier.

We have mentioned in earlier editions of the Finfish Study that there is re-shaping of the fleet capabilities occurring in the North East Atlantic and the statistics for 2014 further evidence the impacts of this.

The whole fish frozen sector has seen share shift towards the Faroes and Norway seemingly at the expense of the at-sea fillet supply from those countries where fillet preparations are in decline.

Our view is that Russia has picked up this slack for at-sea filleting and this has been a fast growth area for their resource utilisation. Adding onto the 2013 growth of 44 % we see an additional 9 % of fillets being supplied from Russia in 2014 consolidating their share of this product format. They are second only to China in volume of fillet preparations and in the four years since 2010 have moved from being smaller than Norway to now being three times their size. For the last two years they have also exceeded Iceland by 10 % despite the more developed land based processing in that country.

Within the frozen fillet category China remains the largest single route of production accounting for around 41 % of all the volume. 2014 saw total tonnage grow by 17 % again helped by the delayed arrival of the 33 % quota adjustment in 2013 that found its way into the market during 2014. Within the publication of the study the WFE of 156,379 t represents the highest level ever seen for cod from China yet it is not their highest share of the sector which had peaked above 50 % albeit in the days of lower global quotas.

The fundamental importance of cod processing in Europe is still evident. Importing 215,054 t of H&G (WFE) and 74,808 t of fresh whole fish is providing valuable work in Europe and supported by an EU catch of 140,109 t represents one of the core seafood materials for our industry and underpins a major generator of added value and employment.

As we mentioned in the 2013 Study cod is still well short of average historical catch levels in the EU and there is ample room for expansion in the EU supply. We remain optimistic that current efforts will have the desired effect of increasing the long-term supply.

By our estimates we see an expansion in EU domestic landings of about 1.9 % in 2014 but this still leaves self-sufficiency at only 11.3 % for this iconic species.
Far from seeing this in a negative context the trends explained above reinforces the point that the EU is still the biggest market for the cod species (morhua, macrocephalus and ogac) by our estimates accounting for around two thirds of global consumption.

Continuation of these trends suggests good news for the EU processing sector especially in the transformation of whole fish which adds the greatest proportion of adding value and employment.

However, we observed that the ATQ for frozen H&G cod was exhausted in 2014 – something that we have not previously had to be concerned about as the item was under a suspended tariff arrangement ensuring all activity and growth came without any penalty. Under the present ATQ regime we have the comfort of a trigger clause that allows a one-off adjustment of 20 % upwards to the quota within the year and we came very close to using this in 2014.

In the fillet sector the 30,000 t ATQ was also fully utilised with the last allocation date being effected in mid-July.

For such key raw materials we consider it essential that some form of flexibility is maintained. Otherwise on exhaustion of an ATQ there is a risk for a key raw material being made uncompetitive and diverting primary processing away from the EU.

- **Alaska-pollock** re-instated the lost volume of 2013 and is once again above 850,000 t WFE growing around 2 % in the year.

  Industrial fillet blocks dominate the use of Alaska-pollock and form the backbone of much of the consumer added value processing industry in Northern Europe states, most especially Germany. Last year we reported that mince blocks had taken a significant step downwards in volume but all of this has been reversed in 2014 with 20 % more being imported in the year.

  The other key change within supply has been a switch back in favour of USA sourced blocks after what seems to have been a one-off year in 2013 that saw a significant slippage in imports of American origin which had been offset by an equal surge in Russian imports.
  There was a modest 5 % increase in the US quotas for 2014 but because this is such a large fishery (>1.5million t) that represents a lot more fish – actually 70,000 t at WFE – so this increase in imports may simply be a reflection of availability.

On the other hand China reduced slightly by 2.5 % (equal to just under 12,000 t WFE) although it still represents close to 50 % of all fillet block volumes. Also, though at a very small scale so far, it is interesting to note that Vietnam is beginning to show through as a processor of pollock.

In both of these Asian countries the source of fish is the Russian fishery. Seeing the decline in Russian supply of 17 % overall across the whole Alaska-pollock complex it may be that there are competing interests for their fish that are a new influence on the market.

Overall, Alaska-pollock remains the second most important species in the whitefish mix and the impact of even modest growth is important to the success of the EU processing industry and we are creeping back towards the highest thresholds seen for this species back in 2007/8. That growth is coming even in the face of the considerable expansion in the No 1 species cod which helps underline that the industry has managed to progress successfully through the challenges of the economic turmoil of the last few years.
Maintaining the current rate of growth will see us exceed historical activity levels in Alaska-pollock in the next couple of years and we must be mindful that headroom in the ATQ tariff system needs to be retained that permits this to happen.

Alaska-pollock is one of the most abundant of all fish resources used for human food, is the most important wild capture groundfish fishery fulfilling that role and the EU is 100 % dependent on importing the species.

We estimate that the EU consumes around 30 % of all Alaska-pollock (fillet products plus surimi) and this percentage is holding steady against the current global quota levels of just over 3 million t.

- **Saithe** appears to have returned to negativity after the rally of 2013. There is no doubt that the supply cycle remains at a low ebb and this is keeping supplies tight.

  So we see an overall drop of 12 % in supply for which imports are responsible for about two thirds and domestic catch the other third. Both Iceland and Norway had reductions to their 2014 quota and landings of around 15 % and this is directly in line with the decline in activity recorded in the EU.

  Each key product sector we have recorded (see table 4.5) shows reduction with the exception of fresh fillets where the Faroes and Iceland actually show growth of close to 50 %. This is still below historical levels and actually doesn't restore the losses made in the previous 12 months.

The EU catch fell back by 15 % which is disappointing as the adjustment to quota was -8 % so utilisation has reduced again to 75 %. As a consequence of the change to activity levels the self-sufficiency fraction has marginally decreased to 27 %.
By our historical estimates we think that the EU has been responsible for more than half of global consumption of this species and this may have edged close to 60 % in 2014.

- **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 sustained the return to growth climbing 1 % to 74,700 t. EU quotas were increased by 7 % but catch utilisation dropped slightly at 68 % - but this is above the low point. Therefore, the EU catch advanced its share of the market to 25.4 %.

  Imports also grew by 1,877 t and now stand at 55,752 t (WFE) but remain below long-term volumes. That reflects that in general catches have been below historic levels but a better understanding of the species and the impact of by-catch levels is beginning to be reflected in the management programs and slight increases are being recorded in both Icelandic and Norwegian waters. Icelandic supply dominates the EU market with a share of 64 %.

- **Haddock** has been adjusting to the lower availability in NE Atlantic fisheries that is a reflection of the cyclical nature of the resources. As we mentioned this species is prone to a level of volatility that sees the global quota typically range between 200,000 t and 400,000t. However, improved long-term fishery management plans do appear to be having the desired effect and we perceive that we are now at the low end of the cycle in 2014 – and note this is at a raised level compared to historical troughs in supply - globally representing a total of around 315,000 t. If we apply that argument to the recovery phase that we believe we have now entered then we can also anticipate that the peak supply will also reach higher levels than historically.

  The EU is normally the largest consumer of haddock in the world (especially the UK) – we estimate that this has recently peaked above 60 % of global demand but we are now seeing this reduced to 50 % as we have reached the low point of supply.

  Whilst that is certainly being held back by the lack of availability it is noteworthy that during this period of reducing supply the consumption in the EU is down by 31 %, from a peak of 237,238 t (2012) to 163,546 t (2014), yet the global supply is only down 20 %.

  When looking at last year's product analysis we can see that whole fresh imports are stable but whole frozen has increased by 13 % to 22,956 t WFE. This more than compensates for the drop in catch of around 7,000 t seen in the domestic EU fishery in 2014. However, the 22,956 t is well below the peak of 40,700 t achieved in 2012.

Frozen fillets are down by 25 % with all supply countries showing substantially reduced volumes. Part of this is due to the lower quota levels in the NE Atlantic fisheries (Barents Sea -10 %, Iceland -20 % for 2014/15 year) but also reflects the fleet re-shaping that we discussed in the cod chapter above.

The EU catch slipped back by 7,110 t (-12.3 %) but the quota cut was more severe at 15.6 % so actually we have seen an improvement to almost full utilisation at 98 %.

Given that our share of global trade has been reducing then it suggests that the EU is not retaining its status as the most attractive market to which to supply haddock.

It is interesting to note that since the loss of GSP tariff status for haddock ex Russia that the imports from that quota have fallen back by 75 % and it may be that this demonstrates that the EU is no longer competitive for the species.

So now we are at a situation where EU demand for haddock is limited by supply and the domestic fishery has reached full utilisation. Even having reached the point of almost complete utilisation the EU fishery is only meeting 31 % of this constrained demand.
In AIPCE-CEP we have long argued that for key species consumed in the EU that we should be mindful of not creating barriers that can make the EU less attractive as a market. Haddock does not have an ATQ and we are seeing the EU losing its status as the preferred market for haddock sales at the same time as we appear to have reached close to full utilisation of our own resources.

- **Hake** has continued its recovery mode with total supply up by 2 % to 502,960 t.

Continuing the long-term trend we can see that imports of whole fresh are sliding quite dramatically falling another 16 % in 2014. These now stand at levels that are less than half of those seven years ago.

After initially ascribing this down to challenging economic circumstances we can perhaps be a bit more optimistic that another key reason may be that EU catches for hake species (the main one in EU waters being Merluccius merluccius) have been recovering strongly and now stand at close to 88,000 t. That is an improvement of 50,000 t during the same period mentioned above and compensates almost entirely for the reduced import activity for whole fresh.

The EU catch level is not yet fully utilising the quota but has reached 82.7 % and represents a self-sufficiency level of 17.5 %.

The hake complex is dominated by frozen fillets and this volume in 2014 increased by only 1 %. We identified last year that the resources of South America were likely to see volatility for a few more years and in 2014 we can see that Argentina, Uruguay and Chile have seen reductions in volumes again, albeit not losing all of the ground gained in 2013. Only Peru from this region was different achieving 17 % growth taking them to slightly above the long term average they have been achieving.

On the other hand South Africa has grown by 20 % to 43,844 t and Namibia more or less has held onto their volumes at 114,478 t. That makes the Southern African region the largest source of frozen fillets at just over half (51.4 %) share of the sector and actually more than half of the hake complex.

Productus hake from North America also exceeded the previous year by 56 % to the highest level since the expanded EU27/8 came into being. There is an ATQ for fillets and blocks from this region and the 12,000 t quantity was exhausted by 9th September.

If our assertion is correct that EU catch is mainly replacing fresh imported volume then we can assume that frozen products in fillet and meat (mince) formats are almost entirely reliant in imports. Earlier exhaustion of the ATQs demonstrates that the market is growing and there is need to consider the impact of this on the future health of the demand for these products.

Our estimates of global supply across all hake species is close to 1 million t of which around 9 % is caught within the EU. Total EU demand using our calculations is a shade under 500,000 t so we are utilising 50 % of the global supply in 2014.

- **Hoki** (New Zealand only as we do not analyse South American supply) lost about half of the ground it had gained in 2013 falling back to 44,685 t WFE (-4 %).

That was a little surprising as the long-term hold back on the quota for this fishery has finally begun to loosen and we are seeing strides forward in the catching effort that is resulting in more availability of hoki, at least from the New Zealand fishery.

The EU remains a key market for hoki materials but it looks like that we have dropped back to around 25 % of the use of NZ waters origin (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. However, it does compete against other whitefish species in some formats e.g. fillet blocks and it may be that in 2014 it has lost ground in face of this competition.

- **Flatfish** is a classification of fish that we have not included in our analysis of wild-capture whitefish but that is playing an increasingly important part in EU fisheries and also in external EU trade for EU processors.

  The most important species is plaice which is currently going through a substantial recovery in EU waters with addition of 11 % in 2014 quota (to 128,549 t) and more than 2.5 times the lowest point reached in 2007 – and it seems there is still further to go based on the latest scientific advice emanating out of ICES. Catching has yet to fully match that turnaround and utilisation only sits at around 67 % some of which may be to do with the market also failing to adjust quickly enough to the increasing abundance. A small amount of plaice is imported from Iceland and Norway but together these only add up to 6 % of the total and probably represent large size fish that is not so easily acquired in the EU fishery.

  Whilst we are expecting that plaice will re-establish itself in the market there are other species of flatfish that are still in demand and are not competing head to head with plaice - either economically or based on consumer experience. Amongst this list are various species of soles and flounder that in the consumers eyes are not substitutes for plaice but complementary offerings. There is an ATQ for this complex of species and it was extraordinary that this ran out within the first few days of opening creating distortion and unnecessary friction within the market. In our opinion this has no influence on the EU plaice market and is a completely different set of species and should be treated as such.

Whitefish Summary:

2014 sees whitefish volumes coming in above 3 million t for the first time in our analysis since the enlarged EU 27/8 came into existence in 2006. Finally, we seem to have broken the hoodoo of the economic challenges of 2008/9 and are seeing an industry back in growth for a sustained period.

At the heart of this is the improved supply environment amongst the key species. Cod in particular has reached much higher levels of availability and the familiarity of the species has enabled an easy expansion of the market in all sectors. Backing this up we have Alaska-pollock that provides secure supply and even though growth is less spectacular the advancement is still apparent and re-assuring.

Indications for 2015 are that we will continue this positive trend.

EU fisheries struggle to advance beyond the 11 % share of wild capture supply but there are promising signs that the situation for quota and importantly utilisation is improving in several of the most important species. We welcome these ongoing efforts.

It is our belief they will find buyers for the additional fish that should come out of these but we make the comment 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 – the aforementioned plaice being such an example.

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.

Again, we repeat our message that 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 so we must be careful not to overstate the potential for self-sufficiency or underplay the importance of imports. 2014 figures show that market growth can cope with both improvements in domestic supply often assigning these to the highest value product formats (e.g. hakes going to fresh) at the same time as expanding opportunities for more commoditised formats such as fillet blocks.

2013 was the first year of application of the new tariff regulation for fish imports and AIPCE-CEP and in 2014 we have seen that several of the ATQs are exhausting earlier than before. Given that the next 3 year cycle is being developed for 2016-18 we must respect these trends and ensure that the EU processing sector retains its competitiveness not just internally but also on the global stage.

4.7 Principal 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 4.18.

In the previous section we have gone into a detailed explanation for many of the causes of change at individual species level 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 recent publications of the Finfish Study 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 most especially North Eastern China (Liaoning and Shandong provinces) and a few other smaller hubs.

Last year we contended that there were strong indications that this trend was slowing and was even showing signs of reversal. In part this is because better technologies are emerging that increasingly capture the benefits of yield improvement and portion control that have been the advantage of hand-cutting so narrowing the cost gap that had originally attracted buyers to using more distant locations for processing.

Perhaps though of greater influence in our view is that the EU primary processing industry's appetite for investing in these developments is growing because we are observing an expansion of resources in fisheries both within the EU and in regions in close proximity that is helping generate more confidence that finally long-term management plans are paying off and that these underlying positive trends are more robust.

Where fish is landed fresh, then supplying the local market should be far more effective in both quality and efficiency terms. As we have repeatedly stated it is a common issue in EU fisheries that supplies are simply not adequate, too scattered geographically, inconsistent or too unreliable to warrant investment on the necessary scale to capture this opportunity fully.

The supplementing of these landings by frozen H&G materials has been pivotal 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 which only reinforces the importance of 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.

We believe we are also seeing some EU species approaching levels of supply that are revitalising the development of specialist hubs of processing that are using that local supply as the foundation to supply specific market sectors. This is extremely encouraging as it drives a virtuous circle of encouraging further investment backed by the confidence that the market wants fish that in turn improves efficiency and creates more demand. Perhaps the example of hakes mentioned in the previous section is a demonstration of this.
That still leaves the need to have access to other product formats that are more efficiently produced elsewhere but still allowing EU processors to get the best of both worlds.

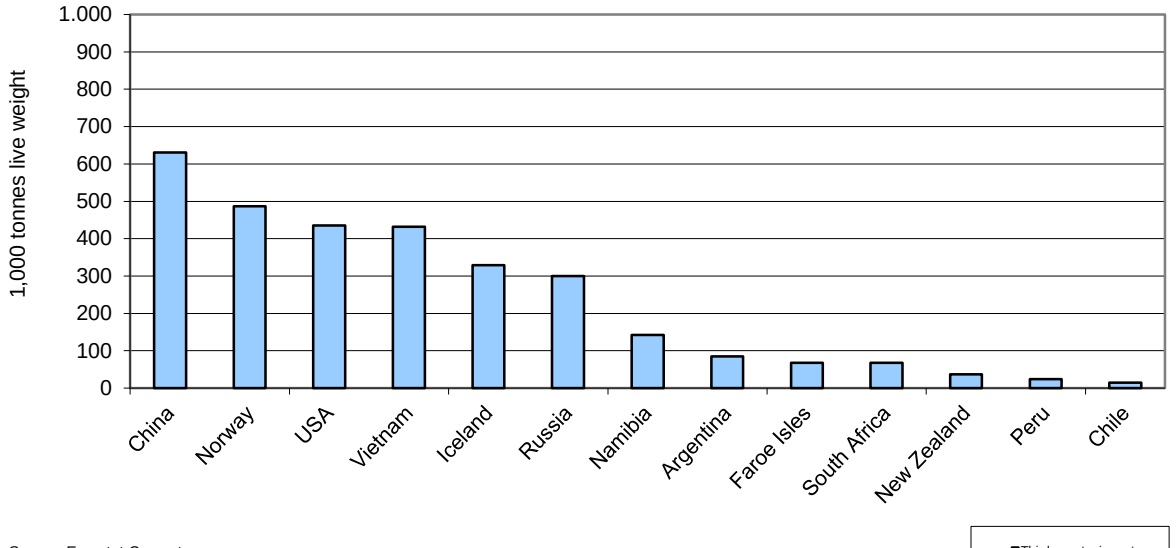
Yield enhancement has been key in supporting the growth of fish and seafood consumption in the EU especially during the period when quotas were not increasing and global fish supplies were under pressure. Whilst there has been much focus and success in improving the management of resources in and on 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.
None of these efforts are lost but there is always progress to be made in this area and AIPCE-CEP encourages every effort to do so.

In preparation of the Finfish Study we have consistently tried to reflect the most notable of these changes and perhaps uniquely we have tried to do this by using differing conversion factors. For imported items where the CN code is the most detailed level of information we know that this is inadequately detailed in itself to be able to segregate some very basis forms of difference in product formats (e.g. skin on versus skinless) or when products have additives. Using the collective knowledge of AIPCE-CEP members we have tried our best to make allowance for these factors and consider our estimates to be more accurate than many others because of this. We must re-iterate that even with this consideration there are inevitable compromises in our calculations but we believe we are recognising most of the key differences.

Repeating our words from last year we know that the statistical formats available to us when we prepare this study do not always allow immediate 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 published 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 (28) by third countries for 2014



Source: Eurostat-Comext
Chart: AIPCE 2015

- **China** is still the largest supplying nation and whilst volume grew slightly in 2014 being up 1.5 % the share of supply is marginally down at 23.5 % of whitefish imports (in addition there has been a sharp reduction of around 22,000 t of freshwater whitefish, tilapia mainly, that comes to the EU).

As China acts as converter of wild capture fish originating in other countries then the volumes of the individual species inevitably reflect 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 plusses and minuses.

For cod there was growth of 17 % on 2014 to 170,862 t WFE which represents 15.6 % share of imported volumes in that species. That share is down compared to the period before the recent major quota adjustments in the Barents Sea fishery when China routinely exceeded 18 %.

Figures for saithe and haddock show decline in both volumes and share.

However, it is Alaska-pollock that by far remains the dominant species accounting for 62 % of China's fish use at WFE. The main item is fillet blocks and as we mentioned in the earlier commentary we have seen a reduction of volume in 2014 of 2.5 % from China. This has taken share down to 46 % which is the lowest level since 2008.

The challenges of operating in China are not diminishing 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.
Another key factor that will influence the future is the rapid shift in currency exchange rates that saw a marked change in the relationship of the € to many other major world currencies. Specifically this has created a leap in the conversion costs ex China which are largely US$ denominated and has far reaching consequences if it persists for any period of time. We do not think this had much impact in 2014 as the contracts in place would have been placed before the real step change took place.

- **Vietnam** continues its struggle with pangasius sales into the EU which have continued to slide by another 10 % in 2014 and are now down by more than 40 % from their peak.

  EU share of Vietnamese sales is now at 19.1 % in 2014 (VASEP).

  For other whitefish species we are seeing Vietnam beginning to appear as a processor albeit at very limited levels so far. In 2014 our analysis shows processing of Alaska-pollock to the tune of 3,031 t and cod 4,609 t (both at WFE).

- **Norway** maintained momentum and saw 6.5 % growth in volumes of whitefish supplied into the EU during 2014. That makes Norway the second biggest supplier to the EU using our way of measurement at WFE. It may well be that once fish that originates in Norway but is processed in a third country before reaching the EU (eg. China) then Norway may well be the largest source of whitefish into the EU.

  Leading the way in species was cod which is no surprise given the extraordinary developments in quota during 2013 and carried into 2014. So building on the 22 % growth seen in 2013 we

have seen an additional 9 % added during 2014. As mentioned previously this is a reflection of large landings taking place in December 2013 that only reached the market in 2014.
Converted back to WFE then cod represents 83 % of all direct Norway whitefish exports to the EU in 2014.

Haddock actually grew by 3 % against a quota cut of 11 %. This is an example of how a fishery in close proximity to the EU can benefit when supplies are volatile. The ability for the EU buyers – probably in the UK – to access fresh and frozen whole fish meant that they were able to replace the shortfall from the EU fishery that occurred in the year.

Saithe declined 18 % but this was very much was to be expected as the quota was cut by 15 %.

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 (16 % and 26 % respectively) but fresh fillets stood still and frozen declined by 14 %.
Of the more processed products salted/dried showed marginal decline.

All in all this means, that EU based operations have benefited from increased access and procurement of the basic formats of raw materials and the transformation value has been attracted to the EU.

Across all key finfish sectors, Norway retains its status as the major trading partner for the EU. Salmon sales improved in 2014 by 10 % and hit their highest ever level of 912,572 t (using AIPCE-CEP conversion factors). This represents 76 % of all imported volume and we estimate two thirds of all salmon (regardless of species) consumed in the EU.

Pelagic trade was also up in 2014 driven by herring items.

- **Iceland** decreased by 4 % at WFE reflecting changes in cod (-1 %), saithe (-14 %) and haddock (-25 %). Although not of a significant magnitude, the biggest percentage changes came in supply of whole fresh in both cod and haddock.

  Much of the change can be accounted for by quota movements that were slightly negative for haddock and saithe. Cod quota did go up so perhaps it is a little surprise to see a negative overall. When looking at the product sectors frozen cod fillets went up by 11 % but salted/dried declined by more or less the same meaning that in terms of use of Icelandic resource we estimate these two sectors to now be almost equal in size.

  Iceland's role as a key finfish trading partner for the EU is substantial and there is more to come as the effect of stricter Harvest Control Rules in its fisheries are leading to strong biomass recoveries and long term quota improvements.

- **USA** recovered most of the lost ground from 2013 and saw volumes increase by 14 % in whitefish. There was a mixed picture across the species.

  The largest is Alaska-pollock which moved up 16 % on the strength of blocks of both fillet and mince. There was also a very minor volume of 2,147 t of whole (H&G) pollock that found its way to the EU market – not a large volume but perhaps the start of a new trend.

  Pacific cod saw a noticeable decline of 22 % which was not driven by resource issues as quotas are quite stable. This seems to have been more that Atlantic cod is more preferred in Europe and the much improved availability of Atlantic cod is to the detriment of Pacific cod.

  Productus hake enjoyed quite considerable growth in 2014 moving up to 38,054 t WFE in fillet blocks. This is likely caused by the more extended allocation of the species into this format as a consequence of developments in other markets (see Russia below).

  Surimi base increased by 6 % from the USA during 2014 and 70 % of this came from Alaska-pollock. The surimi industry is growing steadily in the EU and is heavily reliant on the USA for its base material with 75 % of frozen raw material base coming from this source.

- **Russia** stood still in whitefish WFE.

  From the Atlantic region cod and redfish grew (respectively +17 % and +69 %) but haddock and saithe reduced (-16 % and -73 %). These changes more or less mirror the situation with the Norwegian supply as the Barents Sea fishery is the common source and both countries jointly manage the resources.

  The story of the Pacific side resources is different with Alaska-pollock declining 17 % (actually fillet blocks reduced by 21 % but mince increased 38 %).

  In August 2014 Russia implemented measures that stopped all imports of a wide range of food products – including some fish – with immediate effect. Initially introduced for 12 months this has since been extended up to August 2016.

  The impact of these affected many countries and regions including EU member states. For certain sectors of the fish industry this has posed real challenges for EU fishermen and has created the need to find alternative markets - perhaps the greatest impact is in small pelagics such as mackerel and herring that traditionally had Russia as a major customer.

  To date these measures are not perceived to have had any impact on the flow of fishery products and materials out of Russia, something confirmed by the maintenance of 2013 volumes.

  What is more difficult to understand is how these measures are influencing changes to flows of product from other countries and regions.

For those that would have normally found their home in Russia it may be that some of these have been offered to the EU and could be responsible for some of the volume changes observed in certain species.

The converse is true as Russia has looked elsewhere for supplies. Whether this has resulted in greater competition to the EU for those supplies is not clear from the statistical analysis we have but as two thirds of the year had already passed when the measures were effected it may be too early to draw any reliable conclusions.

Our contention in previous studies is that Russia has been shifting towards greater internal consumption of the species it catches. If Russia is importing less products including fish then it seems probable that using more of its resources internally will be a consequence of fulfilling their needs so it seems likely at some point that trade activity for species traditionally exported from Russia will be affected.

Other regions in general seem to have had a poorer time in 2014 with only South Africa and Peru seeing positive development in whitefish trade with the EU.

Again, it is probably the yo-yoing effect in South American hakes that is setting the tone for this volatility.

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 (82 %) but volume is static in the last two years.

This means that 18 % of the imported material (WFE) in 2014 was in an unprocessed format - whole fresh and H&G frozen – which required complete transformation in the EU. In volume terms this is actually a growth of 15 % to WFE of 472,300 t which is well above any level in the last 10 years.
This underlines the point that perhaps there is a shift of primary processing back to nearer the source and market.

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 2014 (tonnes live weight)

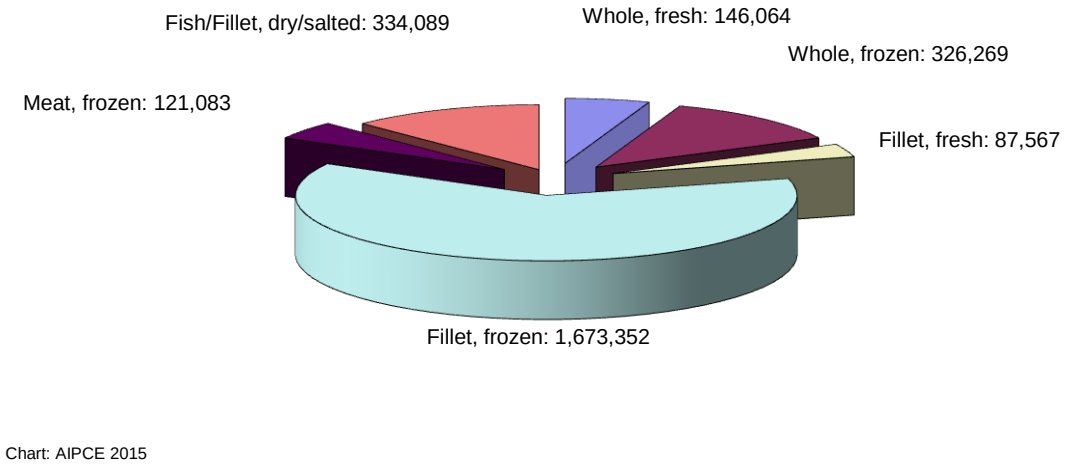


Chart: AIPCE 2015

- Whole fresh has built on 2013 growth of 14 % by adding a further increase of 7 % in 2014. Cod represents 51 % of the category (cod volume up by 22 %) and is responsible for all the growth. There can be no doubt that positive trend in Atlantic cod quota is the key driver. Catching nations are trying to capture more of the value involved in transformation during the primary stage of processing - which is often the least labour intensive and easiest to manage, but as we suggested last time their ability to do this can reach limits because of constraints in availability of human resources, location and logistics support.

- We can see that there is continued growth in fresh fillet imports of 3 % to 87,567 t WFE which sustains the long term build of that sector but outpaced by the whole fresh fish.

- Whole frozen too increased by 19 % consolidating a similar trend as we see in whole fresh. Cod is presently the key species behind this change and is obviously following the resource developments. The shift of the Norwegian and Faroese fleets to simpler H&G production rather than at-sea-filleting is further assisting this activity and because this material is easier to access and also less seasonal then it allows more stable year round production. It is these two countries that have the greatest percentage growth along with Russia.

  The improvement to availability and the consistency of supply associated with these changes is encouraging investment in whitefish processing in several member states. We must try to maintain the momentum that allows us to keep building on this foundation. As the recovery plans for EU domestic fisheries show the potential for enhanced landings locally then having strong local primary processors will be essential to maximising the benefits.

To repeat an earlier point we actually exhausted the ATQ for H&G Frozen cod for the first time in 2014 and we must be alert to the risk of bumping up against limits to such key species. The imports of frozen whole Cod (mainly H&G) are now at 215,000 t of whole fish equivalent which is one and half times the total EU quota for the species.

Haddock quota reduction globally has inhibited similar development in 2013 and 2014 for this species but recent scientific assessments show that resources are in better shape than previously thought and we are entering a period of much improved supply. As we discussed in our species commentary above the EU fishery utilisation is now close to maximum and self-sufficiency has peaked at 31 %.

Hake whole frozen maintained the positive trending of the last 3 years with growth of 3 % even when set against the background of fast growing domestic landings that expanded by 22 % in 2014.

- The frozen fillet format represents the most important for the European processing sector. The key item within this is industrial blocks which are the fundamental raw material for many factories in Northern Europe.

  Overall whitefish based volume expanded 1 % in 2014 to 1.673 million t so accounting for 55 % of all the whitefish resources used in the EU.

  Alaska Pollock is the most important species in this trade format so any change to volumes here are a good reflection of the health of the processing industry so the 1 % growth in 2014 is probably disappointing.

  Only cod has enjoyed meaningful growth (by 9 %) as all other species followed the example of pollock. Cod would be expected to have expanded following the quota increases. The two major beneficiaries in volume appear to be China (+17 % and Iceland +11 %). Russia has also seen further advancement (+9 %) which we put down to the increased production of Shatterpack fillets from at-sea vessels.

  Separately we show the activities in the frozen meat format which is primarily made up of minced fish blocks. 2014 saw slight slippage of 1 % in this sector following the trend of recent years. Mince is a by-product of fillet production so availability is vulnerable as efficiency gains in filleting should reduce the output of mince.

- After we commented in last year's study that we thought the strong performance of the Salted and dried products sector was remarkable we probably should not be surprised to see that there is some correction in 2014 with a 3 % shrinkage to 334,089 t WFE (all cod). This level is still higher than we have been achieving for many years so shows the strength and resilience of this very traditional sector despite facing the tough economic conditions in the Southern European markets that dominate in this trade.

The consumer products of the salted and dried industry form some of the key items in the portfolio of retail stores across southern Europe so have a lot of exposure. Being able to offer consistent and reasonable value is critical.

The improvement to cod resources is a key factor and specifically within this the added abundance of large fish has been fundamental in generating this healthy performance. Although EU resources are increasing the majority of fish caught and landed are unsuitable for salting/drying as the individual fish are too small. Processors in Portugal have been responsible for utilising imported H&G to a great extent and for them this represents their livelihood. So the importance of an adequate ATQ is essential for this sector.

- Freshwater species continued their decline. 2014 saw reductions in the three identified species for reporting.

4.9 Total Supply of Surimi Base

Surimi base imports increased 2.4 % year on year. Alaska-pollock surimi represents more than the half of imports, and comes exclusively from USA. It lost market share however form 54.5 % of imports in 2013 to 52.0 % in 2014. Tropical species surimi equally lost market share form 27.6 % to 25.9 % of imports. The increase is to be credited to surimi base produced from marine whitefish species other than Alaska-pollock with 2.200 additional t, and market share jumping from 18 to 22 %. These species are mainly pacific whiting (USA) and southern blue whiting and hoki (Argentina).

EU production of surimi base is very small – we estimate slightly over 3,000 t - all of which comes out the Northern Blue Whiting fishery. This represents only around 5 % of the overall supply, limited by both the fishing capacity (only one factory vessel) and quota availability.

However, there are very significant secondary processing operations in the EU that use surimi base as their raw material to produce around 135.000 t of surimi seafood. The main surimi seafood producing countries are France, Spain, Lithuania and Poland.

The share of imported finished products has been in a decline for several years and this trend continued in 2014 with surimi seafood imports reducing by around 2 %. The largest consumer markets are France, Spain and Italy, but surimi products can be found in smaller quantities throughout many other EU member states (UK, Belgium, Germany, Netherlands, Denmark, Poland, Czech Republic…).

In the main consumer's market, surimi seafood is in its majority to be found under the "crabstick" presentation but 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. Where finished products are sold chilled, which is increasingly the case, servicing this sector has become a strength of European businesses that is very challenging for importers to match.

4.10 Total Supply of Freshwater Fish

The cumulative change to supplies in freshwater fish is quite negative with slippage of close to 10 % being recorded in 2014. By our calculations we reckon the market to now be 603,436 t WFE.

All three individually reported species show decline and the generic catch all group is down.

- Pangasius has not been able to stop the decline of the last five years. Another 10 % reduction is recorded in 2014 and there has now been an accumulated loss of 40 % since the peak year of 2009.

  The EU accounts for around 19 % of the global market for pangasius. This too is well below the historical peaks that achieved above 35 % share.

  Pangasius has not had universal acceptance across EU but there are member states were the consumption trend remains positive. The dominant product format is IQF fillets.

  The new regulatory requirements regarding moisture levels and glazing that were to be introduced in January 2015 by the Vietnamese authorities have been delayed after pressure from the exporters to provide more time to assess the potential market reaction and impact of the regulation.

  The regulation established a moisture content standard of 83 % and a glaze limit maximum of 10 % for exported products. This was acknowledged as being designed to provide more consistency to the product on offer from Vietnam.

  If these standards are finally adopted then it will remove much of the uncertainty around the true use of resources represented by pangasius. The AIPCE-CEP conversion factor of 3 is based on primary filleting yield and takes no account of any additives or glazing variables.

- Nile Perch fell back by 12 % for the second year in a row.

- Tilapia lost some of the ground it gained last year with a reversal of 8 %. China lost 25 % of its volume so leaving Vietnam and Thailand to grow albeit from relatively low bases. Tilapia is a major species globally but the EU is a minor player with well below 2 % of global consumption.

5 Import Supply Trends of Non-Whitefish Species

From what you have read in this report to here you can clearly see that our main focus is on whitefish species. This is largely a historical as we contend that in employment terms and transitional value this group of species provide the greatest enhancement.

However, the breadth of fish species available is considerable and the choice is constantly being added to as industry develops opportunities, innovations and different presentations for new species and the more traditional materials.

For large pelagics (such as tuna) the relationship between the EU and the locale of catch is very complex. EU flagged vessels operate under licence in many distant water fisheries which in itself provides substantial employment and fishing activity for EU vessels and processors. In addition the involvement of EU businesses has helped support activities in a diverse set of locations outside of the EU borders.

The smaller pelagics such as herring, mackerel and sprat are important species in the EU fishery complex and comprise the largest proportion of the tonnages taken in EU waters under quota species. Within these species there are significant events taking place in the natural movements of the fish stocks that are having considerable effects on the areas of catch and the access to the fisheries.

Shellfish and cephalopods are another sector that provides much choice for EU consumers and also generates significant levels of transitional value in the EU in order to best meet that choice at a local market level.

Perhaps the greatest changes to finfish supply for non-whitefish species has been the global development of substantial aquaculture operations that now have resulted in certain species becoming essential core items to many markets across the globe and within EU member states. The more predictable supply, planning certainty and scale of some of these developments has underpinned considerable investments across the EU.

Yet despite the advances in global aquaculture it is still wild caught fish that is the majority source for consumption in the EU, particularly when considering the abundance of pelagic species.

5.1 Total Supply of Tuna

Supply of tuna species grew by 2 % in 2014 which appears to be a modest figure but in real terms represents an additional 20,000 t of resources at WFE.

Within this the EU waters catch grew by 10 % but is still only a fraction of the overall supply at less than 4 %. Consequently in tuna species the 96 % reliance in imports across the complex means that tuna is still the No 1 imported item when accounted for in resource use at WFE.

The strongest sector growth came in whole frozen up by 10 % and frozen fillets that increased by 23 %.

Loins also increased by 2 % which is significant as this is a major sector and represents a key raw material for the EU processing sector – especially canning.

As we outlined in last year's study the processing of tuna within the EU is a major economic activity represented by a large number of companies and employees. We believe the EU industry to be the world's second largest producer of canned tuna and processed tuna products and it with the potential to be more or less self-sufficient in being able to satisfy the total demand for canned tuna across the EU although it is probably only achieving about half of that level.

Typically the industry is an important contributor to the social and economic conditions of coastal regions that have historically had a high dependence on fisheries and today rely on the stable employment created by the canning sector. Our research estimates that the EU tuna processing industry represents more than 25,000 direct employment and of course provides an indirect effect that makes this much greater.

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 this sector and although we have an ATQ for this format it runs out within days of opening only reinforcing the need to consider how important how certain raw materials can generate greater added value opportunities in the EU.

5.2 Total Supply of Herring and Mackerel

Small pelagics are recent additions to our statistics pack as we wanted to highlight the volumes attached to them. These are very significant and they represent a considerable proportion of the live weight tonnages for all fish species caught and landed in the EU.

In the two species named above the EU catches provide a high proportion of the total supply and self-sufficiency is close to three quarters in each.

The picture for both of these species has becoming increasingly complex in both the fishery activity and in the markets to which products have been distributed.

For fishing activity the geographical distribution has seen a northward drift of mackerel throughout the Atlantic and whilst this seems to have indicated that the resource is in great abundance the effects at local levels are less clear and certain.

Regarding the markets the situation with Russia as a major outlet for EU fishers has been all but stopped since the introduction of trade sanctions preventing imports of certain fish products since August 2014.

It is the case that the EU consumer is familiar with the health benefits associated with eating these species alongside whitefish and local demand has been increasing but it remains the case that small pelagics have been the key volume driver of export activity from the EU fisheries.

The 2014 EU quota for herring was reduced by 3 % but catches advanced by just under 1 % which has resulted in an improvement in utilisation to 93.6 %.

For mackerel we have seen catches improve by 76 % to 585,499 t.

5.3 Total Supply of Shrimp/Prawns and Cephalopods

AIPCE-CEP have been including statistics for these sectors since 2012 and our commentary is not yet as detailed as for other species. As can be seen from the data tables 5.5 and 5.6 the cumulative use of resources in these sectors is close to one and half million t which ranks them as high as each of the three main finfish species. However, the shellfish and cephalopod sectors are extremely diverse and complex so our report is limited to a more general summary. The reliance on imports is very high and in many key species almost total.

2014 has seen a reversal to the trend of decline in shrimp/prawns with growth of 3 %. All but a tiny fraction of the shrimp species are imported and there have been challenges to the two key types of shrimp – coldwater and warmwater – that in 2014 saw a switch around in the dynamics between them.

Warmwater prawns account for the larger market share – by our categorisation and estimation being around 75 % of all the trade WFE - and this grouping has come back into growth after a period where disease and weather have impacted the supply negatively.

There is a diverse range of product presentations in warmwater prawns but one of the most important for the EU processing industry is raw whole prawns that are prepared specifically on demand for the local member state market. In 2014 we estimate this format grew by 11 % with Ecuador and India being the principal supplying countries.

There is an ATQ of 20,000 t for raw whole prawns (Penaeus vannamei only) that have this transitional value here in the EU and this quota was exhausted quickly with the last allocation date being 16th February.

Coldwater prawns have suffered a setback in volumes that appears to be a resource driven issue as the supply across the North Atlantic region has diminished. Key supply countries such as Canada and Greenland have seen reductions to prepared prawns (cooked and peeled) of 12 % as a consequence.

Cephalopods show an increase of 6 % in 2014. Of the key items we can see that squid is down in total by 6 % and Cuttlefish by 19 %.

Octopus is up by 7 %. The remaining catch all category of 'other cephalopods – frozen' is up significantly but this is made up of a wide variety of items and species.

5.4 Total Supply of Aquaculture species

The growth of aquaculture at a global level has been dramatic in the last two decades since we began the publication of our study. For certain species this has created whole new markets that could never have existed without the vision and efforts of those engaged in this sector of the industry. The EU aquaculture sector has not developed that rapidly and today we estimate is only around 1.26 million t of harvested weight products. Of this just over 50 % is made up of finfish species the rest being comprised of shellfish – e.g. mussels – that are farmed in several locations around the EU.

Our report is not yet studying this latter grouping but below we explain a little about the finfish element. We use FEAP reports for the EU data.

5.5 Total Supply of Salmon (Farmed and Wild)

In farmed finfish the most important species consumed in the EU is farmed Atlantic salmon but EU growers' only account for around 13 % of supply.

By far the major player in product supply is Norway who accounts for more than three quarters of all salmon consumed in the EU.

The growth for the species continues to be impressive with volume up another 8.2 % in 2014. Across the salmon species complex – that includes around 71,000 t of Pacific salmon by our estimate – the total WFE of 1,380,082 t has propelled salmon to be the no 1 species consumed in the EU finally ahead of cod and tuna.

Atlantic salmon has now become an essential line in almost every fish selling outlet and the vast majority of the product is sold in chilled format. This is resulting in the stronger growth of chilled fish products as the scope for piggy-backing other chilled fish on the back of salmon is creating new market opportunities in many member states.

The sector is dominated by whole fresh imports at WFE and grew by 12 % in 2014. As with some of the whitefish species it is the less processed formats that achieve solid growth and in the case of this species account for 56 % of all the resource use. That means that the value of transformation resides in the EU and also reflects that proximity to the final consumer market appears to be increasingly important when meeting market needs.

Fig. 5.1 A An analysis of the volume (1,000 tonnes) of unprocessed and processed salmon imported into EU from third countries for 2014

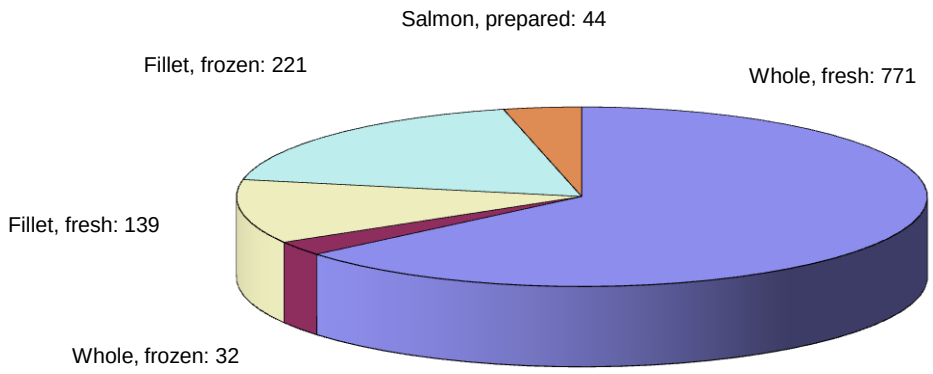


Chart: AIPCE 2015

Frozen formats have also expanded well in 2014 with frozen fillets up by 9 %. China has seen most of this growth with their activity up by 32 %. It is likely that Pacific salmon plays a big part in this. In last year's study we anticipated this could happen as the North Pacific fisheries were coming off a high seasonal catch but the arrival of that material to the market would be delayed as the supply chain had to complete its routing.

Similarly prepared salmon products have grown strongly this year, especially canned from USA stocks with a 15 % increase.

Fig. 5.1 B An analysis of the volume (tonnes) of frozen salmon fillet import by country into EU for 2014

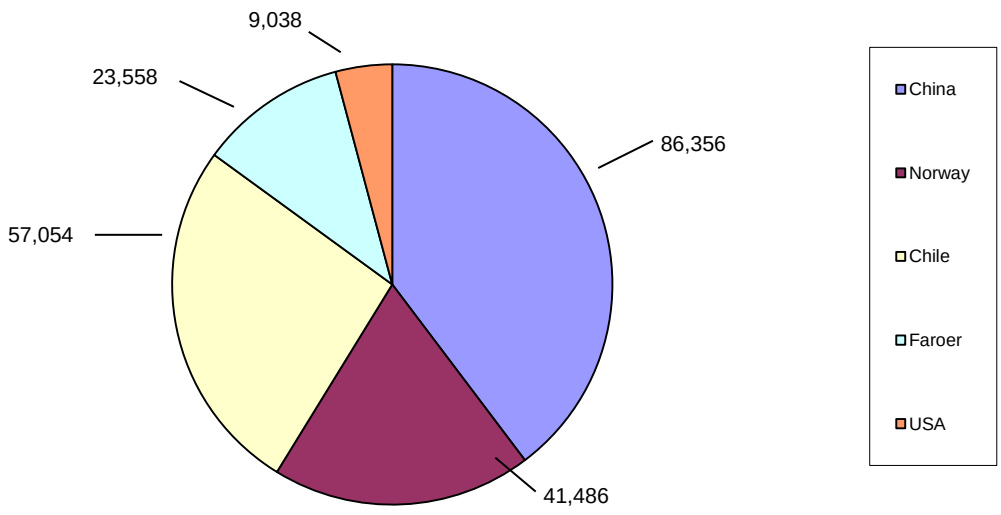


Chart: AIPCE 2015

5.6 Total Supply of Sea bass and Sea bream

For the first time this year we have incorporated data about these two species that represent an important constituent of the EU aquaculture industry and are particularly relevant to the Mediterranean region.

By our estimates the size of the Sea bass market is around 90,000 t in the EU and the domestic supply satisfies 82 % of this demand with growth of 73,714 t in 2014.

Sea bream is a slightly larger market at 128,000 t with self-supply also at 82 % or 104,594 t.

6 EU Supply Base

6.1 Overview of EU Fish Stocks

When we prepare this study the ICES advice has usually been made published in preparation for outlining the fishing opportunities for the year ahead. The various management bodies responsible for setting the quotas will take this information and consult with their relevant stakeholders and organisations to make final proposals which are generally announced during the autumn period.

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. There is no constancy when discussing activity in wild fisheries but we are optimistic that the long-term intent to improve EU fisheries will 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 caught in EU waters and are subject to annual quotas – cod, haddock, saithe, redfish and hakes. In this section we also add whiting and Atlantic pollock to the data as these are part of the whitefish mixed fishery complex in Europe and have meaningful volumes in the context of EU supply.

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. Our figures have these elements included.

Betweeen 2013 and 2014 this grouping of species had a cumulative quota increase of 0.3 % to 498,722 t. Within this hakes had the most increase being up by 17,600 t (19.9 %), cod was up 1,100 t (+0.6 %), haddock down by 9,600 t (-15.6 %), saithe down 4,900 t (-8.2 %), whiting down 4,700 t (-9.7 %), redfish up 1,800 t (+6.8 %) and pollock stable at 15,800 t (extracted from Tab. 6.1).

The cumulative total of just under half a million t still represents only a minority of the necessary supply to the EU market for whitefish but we recognise and fully appreciate the role these fisheries play in providing a base for local processing and supply that has been and will continue to be critical to for long-term development of the broader EU industry.

Our summary in this chapter remains the same:

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

Quota represents the total allowable catch and fishing. In theory the expectation is that this will be fully utilised and this assumption forms the basis of the management plans and actions in the fisheries. However, within the EU regions many species are caught simultaneously in so-called mixed fisheries, a feature that is especially true of the whitefish species. Consequently, the targeting of individual fish type will be a primary objective but will 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 should improve the utilisation but not necessarily the marketability of the fish depending on the size and condition of the fish that is going to be landed as a result of this change.

Once again we have used the EU Catch Reporting database for our figures and then calculated the utilisation rates for EU quotas for year 2014.

We can rely on the premise that the official submissions for each member state are generally accurate but adjustments are made retrospectively for up to 3 years and we try to capture these in our data tables. This will explain why some our figures show slight differences to previous publications of Finfish Study.

We estimate that the grouping we outline above increased total landings by 0.9 % to 377,600 t. This left 24.3 % of the quota as not landed - which is a marginal improvement of 0.5 % over last year but still below previous years. Cod was taken at 70.6 % of quota and it remains that there is poor utilisation in the eastern Baltic especially at 35.2 %. By contrast the North Sea cod appears to be closer to 100 % utilisation.
Haddock catches fell back due to the quota change but only 2 % remained uncaught. The large increase in hakes quota mentioned above was matched by a corresponding catch increase with 82.8 % of availability taken.

We are hopeful that the implementation of the regulatory and management review will focus on this issue 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

With dependence as high as 89 % for whitefish species then the movement in quotas at a global level is of great interest to AIPCE-CEP and its members. In Tab 6.3 we give an overview of some of the key fisheries we rely on and their relative performance. As much as possible we use public data from the various fishery manager websites but we will use estimates gleaned from our members and their network if public data is elusive.

Establishing quota levels in all these fisheries is based on regularly updated scientific advice and review the processes for which have varying degrees of transparency.

Quotas are not constant and fluctuate according to changes in many factors of which fishing activity is only one.

Wild capture fisheries are subject to many natural influences such as recruitment fluctuation, changing environmental conditions, weather and host of variables well beyond human control. Our observation is that many fishery management regimes have become more precautionary in response to market pressures that require overt demonstration of responsible and sustainable practices. Such market pressures are by no means unique to the EU.

During our species and regions commentary we have discussed the dimensions of some of these global quota changes but here is a quick summary of what we see as 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 in 2013 and 2014. There has been some reduction is the cod biomass calculations that is now resulting in reductions since 2014 but the underlying strength of the resource is robust. Haddock resources have been found to be more prolific than expected and during 2015 there are increases, including changes in year that are improving availability. Currently the natural cyclical behaviour of saithe has been resulting in lower quotas and catches but this phase appears to now be ending and the recommendations are now becoming stronger for raising quotas in the NE Atlantic;

- Iceland has also been seeing increases in the biomass for cod for several years and it is now at a 50 year high. Haddock also appears to have passed beyond the low point of the current cycle and is now increasing again;

- The managers of both these key regions have introduced much more conservative fishing mortality targets (F) that should enable the recovery in resources to be maintained. That does not mean that quotas will continue to increase or remain stable but the underlying trend should be at higher levels in comparison to those in historical cycles.

- USA Alaska-pollock quotas went up by 5 % in 2014 and added another 4.5 % for 2015 but this is approaching the top of the quota cycle with a cap to cumulative groundfish activity in the Bering Sea now limiting any upside depending on the priorities given to each species. The other key Alaska fishery is stable with Pacific cod holding around 320,000 t;

- Russian pollock quotas seem to keep edging up with another 2-3 % added in 2014. This would appear to be mainly supported by the Sea of Okhutsk region;

- 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 for the 2014 quota year;

- Hake across the South Atlantic have had mixed performance. In Southern Africa their downward pressure seems to have eased and catches have improved slightly to around 290,000 t between the two fishing nations of South Africa and Namibia.

  South American hakes remain volatile and the supply improvement seen in 2013 has been reversed again with lower catches across the continent in 2014.

These whitefish fisheries form the key supply regions for 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.

EU processors compete for the opportunity to buy products from these resources and are subject to the vagaries of the global markets. As we have touched on earlier the outward flow of fish and fish products from the EU has been disrupted as trade sanctions have limited access to some traditionally important markets. Conversely the inward flow of fish to the EU does not yet appear to have been affected by these sanctions but competition for fish does not get less intensive and we must be aware that developments could happen quickly.

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.

Because there are so few common formats it is almost impossible to make meaningful direct comparisons between local supplies and those from more distant shores. For example industrial blocks are a key material for the frozen processing industry but relatively few of these are now processed in the EU because we have been lacking the concentration of fish landings to warrant block production. Where such processing does happen it is rarely that EU caught fish will be the raw material as the fresh markets are more responsive to the opportunity of using fresh fish landed in varying quantities on a day to day basis.

So as we have outlined in the reporting above the availability of imported fish in both whole frozen formats is unlikely to be in direct competition with EU fresh landings yet it provides an important source of material that allows local processors to more efficiently use their capacity.

We believe that imported raw materials are rarely in direct competition to local supplies and act in a complementary way to allow the location and well-being of processors to be protected.

For the sake of continuity we attach the graphs below the first of which Fig 7.A we think is a clear demonstration of our point.

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

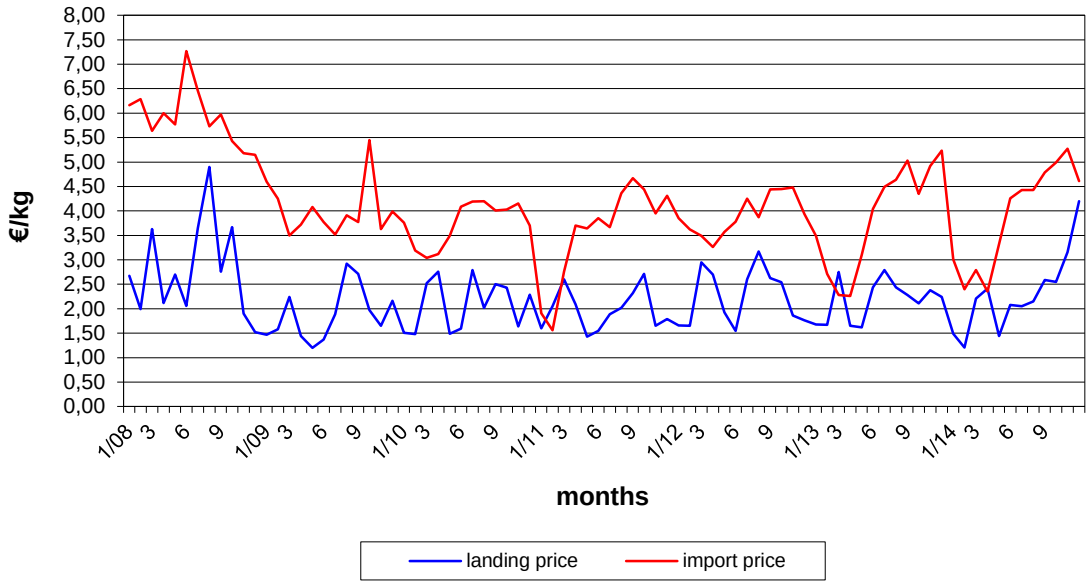


Fig. 7 B EU import average prices (€/kg) for frozen fish fillets

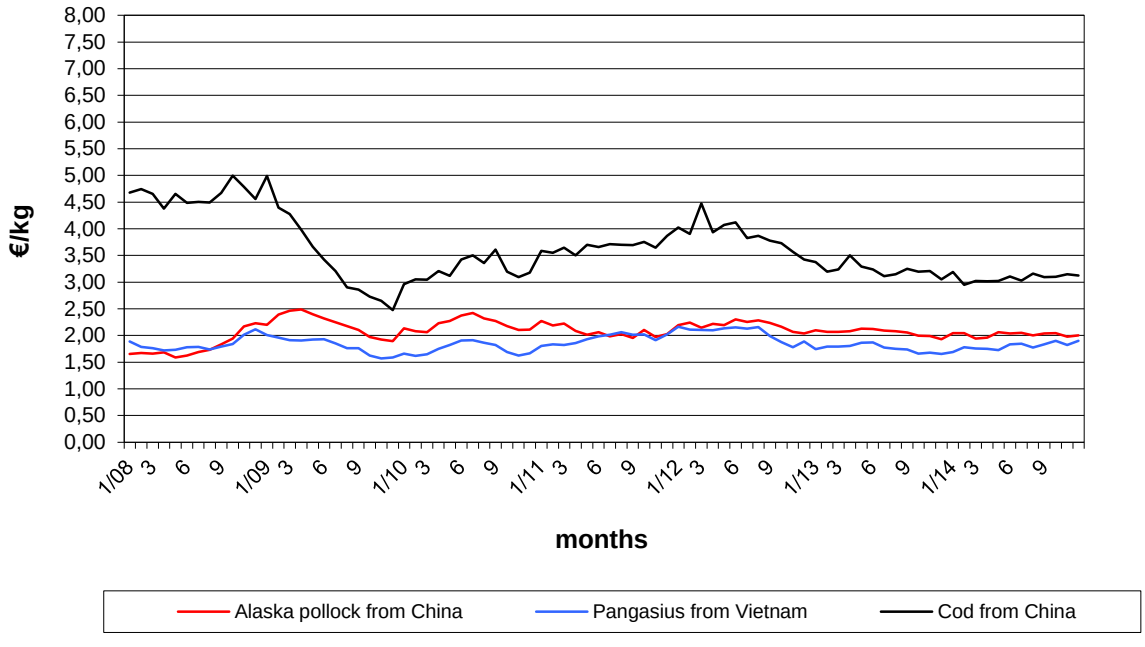
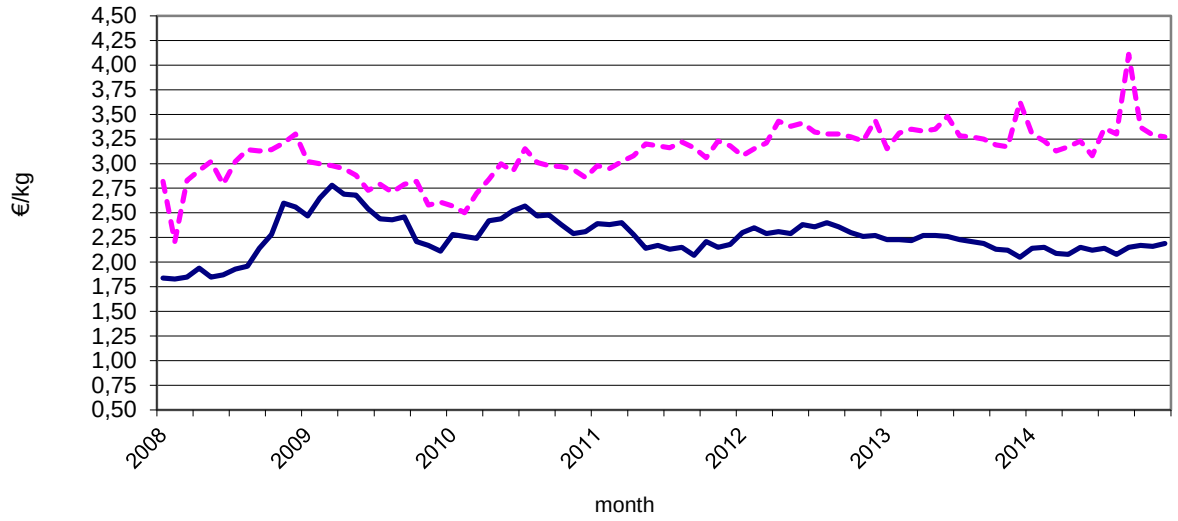


Fig. 7 C Development of EU import prices of frozen fillets of Alaska pollock and hake from third countries



Source: Eurostat-Comext
Chart: AIPCE 2015

Our position on this issue has been given support by the recent conclusions from the report of a consultant engaged by the EU Commission to research and verify that the ATQ tariff regulation is both fit for purpose and in the first round of application of 2013-2015 will deliver the expected benefits. There are two notable elements to the report's conclusion:

1. The ATQ instrument **does not have any detectable negative impacts on the EU production sector**;

2. The report also finds that this regime can be evaluated to be **broadly efficient in the creation of value-added** at the level of every EUR 1 custom duty foregone generating between EUR 2.5 and EUR 3 value-added by the industry.

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 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@agep.eu). There are also further publications and commentaries at our website: www.aipce-cep.org.

9 The Role of AIPCE-CEP

AIPCE-CEP was founded in 1959. Its high degree of representativeness (more than 80 % of the EU market) and its widely acknowledged expertise ensure that it enjoys an effective working relationship with EU policy-makers and other relevant stakeholders.

This EU association plays a key role in promoting the sector, its mission being to represent EU fish processors and traders as a strong common voice in Europe. It aims to encourage a policy and regulatory framework in which companies can grow and prosper so that they can continue to offer consumers healthy, sustainable and responsible fish products.

What AIPCE-CEP represents for its members

Advocacy: EU policy-makers recognise AIPCE-CEP as the relevant stakeholder representing EU fish processing: our views are heard and a clear impact can be made on relevant legislative processes, notably concerning labelling, trade, sustainability and food safety.

Regulatory assistance to business: Keeping abreast of EU legislation developments, enabling businesses to influence and adapt.

Belonging to a network where main EU fish processors are represented facilitates information sharing:

- Gathering intelligence on what is happening in different markets is key to adapt the business to potential threats or opportunities.

- The platform to exchange with other countries/markets enables all members to identify common goals and to set up the best strategy to achieve them in a joint effort.

Reputation management: Tackling potential crisis on behalf of the whole EU industry, rather than an individual company approach, benefits both the whole sector - as it speaks with a unified voice. Individual companies can see their efforts leveraged by strong support through a unified EU industry position.

AIPCE-CEP activities

AIPCE-CEP activities are carried out within the framework of an action plan based on our priorities: ensuring the supply; improving the regulatory environment and promoting the image of our sector. During the last year, AIPCE-CEP has continued to work hard to enhance our industry image by engaging in a regular and constructive dialogue with policy-makers and key players. Our focus has also remained on defending the need for stable and predictable access to imported raw materials to sustain markets and ensure continuity of supply to EU consumers as well as the need to improve resilience and traceability at all stages of production.

Ensuring the supply of raw materials for our industry is paramount to maintain our competitiveness. Over the last year, our Trade WG has therefore contributed substantially to the revision of EU regulation 1220/2012 on autonomous tariff quotas (ATQ), for the period of 2016-2018. To assist the Commission in the preparation of their proposal, AIPCE-CEP has submitted an evidence-based case drawing on past and current trends, as well as an assessment of future trade at both EU and global levels. Several meetings have been held with all of the relevant Commission services, including the Directorates responsible for trade and enterprise. We provided them with detailed and sound evidence of the industry needs. This process continues with negotiations at Council level, during which AIPCE-CEP remains a key player in providing all the necessary market intelligence which helps EU policy-makers reach the best informed decisions.

Trade agreements are equally important for the supply of our industry, and AIPCE-CEP has maintained regular contacts with Commission services and other relevant players to ensure that these negotiations reflect market realities.

Several meetings and active coordination work has been undertaken to follow closely the process of identification and potential listing of non-cooperating countries under the terms of Council Regulation 1005/2008 establishing a Community system to prevent, deter and eliminate illegal, unreported and unregulated fishing (IUU). Establishing effective measures to deter IUU remains a priority for our sector.

Contacts with the European Commission have been organized and AIPCE-CEP has contributed actively to key events such the debate on “EU markets driving good governance in fisheries” where, in collaboration with WWF, we stressed the need for a global fight against illegal fishing. Further contacts with relevant players have been developed to maintain the necessary momentum to align all relevant forces against IUU.

From December 2014, some of the new labelling provisions under Regulation 1169/2011 and all new labelling requirements applying to fishery products under Regulation 1379/2013 entered into force. Our members have been adapting their labels and packaging since these regulations were published, to conform to the new provisions. Nevertheless, in some of these provisions different interpretations have emerged across member states as to how the implementation has to be made. AIPCE-CEP, through its Labelling WG, has worked intensively with the European Commission and member states to ensure a harmonized interpretation of the new provisions. On some issues where further clarity is needed, our industry continues to work with relevant stakeholders to ensure the greatest possible degree of harmonization in implementation.

Article 36 of Regulation 1379/2013 (Eco-labelling reporting) provides for the preparation of a feasibility study. Through its Sustainability WG, AIPCE-CEP has taken very active part in the debate at European Parliament level as well as in the framework of the European Commission consultation by the wide sharing of our industry expertise.

Over the last year, AIPCE-CEP has continued its participation in the Advisory Councils which cover the different EU regions, to ensure the fish processing and trading activities are properly considered in the advisory process. During the reform of the Common Fisheries Policy (CFP) AIPCE-CEP strongly advocated the establishment of a Market Advisory Council (MAC) as a range of issues, particularly in relation to trade and marketing of fish, transcend regional boundaries and require proper discussion in a horizontal forum. The MAC is included as a new element in the CFP (Article 43 of Regulation 1380/2013). The initiative for the setting up of the MAC now rests with stakeholders and AIPCE-CEP has taken the leadership to drive the process along with other relevant representative organisations. Over the last year our association has had frequent contact with the Commission and other stakeholders. We have facilitated the process for the creation of the MAC to ensure that this key tool is created for the benefit of the whole sector.

In parallel, regular internal contacts and debate have enabled AIPCE-CEP to contribute and influence discussions and policy-making on several topics including food-law, waste and labour issues.

* * *

Tab. 4.1 Food balance for fish and fishery products

1,000 tonnes live weight

	EU (25)		EU (27)							EU (28)		
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015 a)
Catches b)	7.230	6.905	5.200	5.136	5.216	5.068	4.944	4.889	4.604	5.030	5.043	5.245
+ Aquaculture production c)	-	-	1.283	1.306	1.239	1.286	1.256	1.227	1.237	1.251	1.264	1.289
- Non-food uses	2.500	2.400	1.000	1.000	1.000	1.000	1.000	1.000	700	1.019	989	989
= Supply for consumption	4.730	4.505	5.536	5.442	5.455	5.354	5.200	5.116	5.141	5.262	5.318	5.545
+ Imports (Third countries) d)	7.993	8.355	8.741	9.061	9.247	8.928	8.894	9.221	8.858	8.927	9.112	9.385
= Total supply	12.723	12.860	14.277	14.503	14.702	14.282	14.094	14.337	13.999	14.189	14.430	14.930
- Exports (Third countries) d)	2.239	2.196	1.925	1.944	1.994	1.905	2.104	1.951	2.086	2.002	2.161	2.269
= Total consumption	10.484	10.664	12.352	12.559	12.708	12.377	11.990	12.386	11.913	12.187	12.269	12.661
Total supply (kg/caput) e)	28	28	29	29	30	29	28	29	28	28	29	30
by catches for consumption in %	37	35	39	38	37	37	37	36	37	37	37	37
by third countries imports in %	63	65	61	62	63	63	63	64	63	63	63	63
Supply for consumption (kg/caput) f)	22,8	23,1	26,6	25,4	25,6	24,9	24,0	24,7	23,8	24,3	24,4	25,2
Self-sufficiency (%) g)	45	42	45	43	43	43	43	41	43	43	43	44

Notes: a) Estimation.- b) Incl. Aquaculture production until 2005.- c) Estimation for 2013-2015.- d) 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.- e) Total supply / EU-population * 1000 = kg/caput/year.- f) Supply for consumption / EU-population * 1000.- g) Supply for consumption / Total supply * 100 = Rate of self-sufficiency in %.-

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

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Tab. 4.2 Results of the tables "Origin of imports of important wild captured whitefish into EU (27/28) a) 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	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
Total b)	317	320	336	336	340	2.454	2.613	2.506	2.625	2.689	2.771	2.933	2.842	2.961	3.029
Cod	138	139	151	137	140	823	873	869	1.015	1.095	961	1.012	1.020	1.152	1.235
Saithe	52	54	48	49	42	168	132	115	123	110	220	186	163	172	152
Hake	55	61	62	72	88	471	468	400	421	415	526	529	462	493	503
Alaska-Pollock	-	-	-	-	-	724	854	850	835	855	724	854	850	835	855
Haddock	47	46	57	58	51	166	176	180	131	113	213	222	237	189	164
A. Redfish	25	20	18	20	19	61	60	50	54	56	86	80	68	74	75
Hoki	-	-	-	-	-	41	50	42	46	45	41	50	42	46	45
Plaice c)	75	77	86	94	86	6	6	6	6	5	81	83	92	100	91

Species	Total supply: by catches (%)					Total supply: by third countries imports (%)					Third countries imports: by imports from China (%)				
Year	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
Total b)	11	11	12	11	11	89	89	88	89	89	22	23	25	24	23
Cod	14	14	15	12	11	86	86	85	88	89	16	18	16	14	16
Saithe	24	29	29	28	28	76	71	71	72	72	13	18	16	14	17
Hake	10	12	13	15	17	90	88	87	85	83	2	2	2	2	2
Alaska-Pollock	-	-	-	-	-	100	100	100	100	100	54	50	47	48	46
Haddock	22	21	24	31	31	78	79	76	69	69	20	21	20	20	16
A. Redfish	29	25	26	27	25	71	75	74	73	75	25	20	18	19	19
Hoki	-	-	-	-	-	100	100	100	100	100	32	24	23	20	24
Plaice c)	93	93	93	94	95	7	7	7	6	5	9	5	1	0	0

Notes: a) EU (27) 2010-2012; EU (28) 2013-2014.- b) Total of the 7 listed species without plaice.- c) Listed for reason of comparison.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.3 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for important wild captured white fish species a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2013	14/13
Whole, fresh	**132.824**	**120.226**	**136.940**	**146.064**	**100**	**7**
of it from Faroe Islands	7.241	4.433	4.706	4.655	3	-1
Iceland	22.641	22.029	20.715	18.774	13	-9
Norway	71.391	68.004	90.065	104.805	72	16
Namibia	4.843	4.564	5.550	4.669	3	-16
Russia	952	557	69	216	0	212
South Africa	11.316	5.346	22	0	-	-100
Whole, frozen	**261.024**	**261.066**	**275.208**	**326.269**	**100**	**19**
of it from Argentina	13.977	10.451	11.517	11.835	4	3
Faroe Islands	1.198	2.166	2.166	8.424	3	289
Iceland	13.871	12.943	66	0	-	-100
Namibia	8.758	9.911	6.530	7.871	2	21
Norway	80.781	84.600	94.921	119.314	37	26
Russia	55.290	57.842	61.401	78.587	24	28
South Africa	17.594	20.006	34	0	-	-100
Fillet, fresh c)	**67.985**	**79.139**	**84.979**	**87.567**	**100**	**3**
of it from Faroe Islands	4.055	7.764	3.227	4.446	5	38
Iceland	46.186	53.184	63.732	64.423	74	1
Norway	17.589	18.179	17.889	18.666	21	4
Fillet, frozen	**1.690.498**	**1.596.387**	**1.663.793**	**1.673.352**	**100**	**1**
of it from Argentina	83.884	58.321	79.023	68.863	4	-13
China	649.685	593.877	600.702	607.590	36	1
Faroe Islands	37.976	37.130	38.246	31.668	2	-17
Iceland	127.607	141.360	133	0	-	-100
Namibia	117.263	116.716	37	0	-	-100
New Zealand	36.893	31.115	36.192	33.050	2	-9
Norway	61.975	55.911	44.856	38.434	2	-14
Russia	156.400	159.186	213.230	194.547	12	-9
USA	319.339	345.196	295.687	351.347	21	19
South Africa	39.757	38.235	15	0	-	-100
Meat, frozen	**136.983**	**137.075**	**121.716**	**121.083**	**100**	**-1**
of it from Argentina	6.548	4.687	4.835	4.663	4	-4
China	17.357	17.475	9.867	12.204	10	24
Faroe Islands	2.510	3.450	3.154	2.623	2	-17
Iceland	11.381	10.817	12.953	10.640	9	-18
Namibia	20.400	15.730	17.076	14.883	12	-13
Norway	3.358	2.878	3.302	3.227	3	-2
Russia	27.723	24.827	18.310	19.766	16	8
USA	40.773	45.312	41.558	45.113	37	9
Fish and Fillet, dry/salted	**324.072**	**312.200**	**342.783**	**334.089**	**100**	**-3**
of it from Iceland	84.102	81.681	91.322	85.311	26	-7
Norway	192.599	187.049	205.615	202.161	61	-2
Supply (Catches + Import)	2.932.816	2.841.630	2.961.574	3.027.519	100	2
of it catches of quoted species	319.431	335.537	336.155	339.095	11	1
import from third countries	2.613.385	2.506.093	2.625.419	2.688.424	89	2
of it from China d)	679.601	620.484	622.147	631.256	23	1
Norway	427.691	416.622	456.648	486.610	18	7
USA d)	413.834	448.424	383.008	435.065	16	14
Iceland	305.147	288.311	341.672	328.751	12	-4
Russia d)	232.419	243.333	298.631	300.040	11	0
Namibia d)	151.229	148.963	145.872	141.901	5	-3
Argentina d)	104.709	73.460	95.375	85.361	3	-10
South Africa d)	69.491	63.787	63.441	68.163	3	7
Faroe Islands d)	71.492	67.135	68.118	67.549	3	-1
New Zealand d)	40.155	33.813	38.949	36.680	1	-6
Peru d)	20.040	15.860	19.595	24.269	1	24
Chile d)	28.373	24.967	26.029	15.306	1	-41
Uruguay d)	30.914	16.416	17.877	12.684	0	-29

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 2015

Tab. 4.4 Origin of imports into EU(EU [27] 2011-2012; EU [28] 2013-2014) from third countries for cod a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**41.852**	**39.357**	**61.467**	**74.808**	**100**	**22**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	2.610	1.504	1.384	1.499	2	8
Iceland	4.772	5.629	6.696	5.062	7	-24
USA	-	-	-	-	-	-
Norway	34.455	32.214	53.386	68.246	91	28
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	**120.550**	**134.135**	**168.402**	**215.054**	**100**	**28**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	236	598	1.091	7.165	3	557
Iceland	443	860	631	634	0	0
USA	38.419	38.322	36.002	29.510	14	-18
Norway	24.932	33.807	61.565	82.511	38	34
Russia	47.273	50.501	57.216	75.257	35	32
South Africa	-	-	-	-	-	-
Fillet, fresh	**56.277**	**63.985**	**73.380**	**73.764**	**100**	**1**
of it from Faroe Islands	1.146	1.110	532	456	1	-14
Iceland	38.226	45.493	56.086	55.252	75	-1
Norway	16.754	17.374	16.648	18.027	24	8
Fillet, frozen	**303.601**	**296.741**	**347.758**	**379.080**	**100**	**9**
of it from Argentina	13	-	-	-	-	-
Chile	-	-	-	-	-	-
China	137.293	123.141	133.089	156.379	41	17
Faroe Islands	14.409	13.430	14.250	10.219	3	-28
Iceland	67.723	59.329	73.419	81.767	22	11
USA	670	933	1.591	1.324	0	-17
New Zealand	-	-	-	-	-	-
Norway	31.573	28.896	29.695	28.703	8	-3
Russia	44.543	55.890	80.627	87.760	23	9
South Africa	-	-	-	-	-	-
Meat, frozen	**26.391**	**22.095**	**20.863**	**18.161**	**100**	**-13**
of it from Argentina	-	-	-	-	-	-
China	8.971	7.016	2.430	2.998	17	23
Faroe Islands	211	116	189	199	1	5
Iceland	7.573	7.307	9.984	8.495	47	-15
USA	3.237	2.859	3.188	1.061	6	-67
Norway	3.141	2.501	2.718	2.961	16	9
South Africa	-	-	-	-	-	-
Fish and Fillet, dry/salted	**324.072**	**312.200**	**342.783**	**334.089**	**100**	**-3**
of it from Iceland	84.102	81.681	91.322	85.311	26	-7
Norway	192.599	187.049	205.615	202.161	61	-2
Supply (Catches + Import)	1.011.370	1.019.051	1.152.170	1.235.064	100	7
of it catches of quoted species	138.629	150.537	137.516	140.109	11	2
import from third countries	872.741	868.514	1.014.654	1.094.955	89	8
of it from Norway	303.454	301.842	369.626	402.608	37	9
Iceland	202.838	200.300	238.138	236.520	22	-1
Russia c)	105.900	125.412	153.447	179.069	16	17
China c)	158.598	139.115	146.937	170.682	16	16
Faroe Islands c)	37.033	29.655	33.974	35.161	3	3
USA c)	43.920	43.309	41.396	32.260	3	-22
Vietnam c)	521	5.721	4.426	4.609	0	4
Canada c)	4.170	2.471	2.195	3.531	0	61
Namibia c)	-	-	-	28	0	-

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.-

Published by: AIPCE 2015

Tab. 4.5 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for saithe a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**10.346**	**9.083**	**10.336**	**9.360**	**100**	**-9**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	759	276	167	339	4	103
Iceland	1.045	773	286	288	3	1
Namibia	-	-	-	-	-	-
Norway	8.543	8.034	9.881	8.730	93	-12
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	**24.122**	**15.746**	**15.363**	**12.622**	**100**	**-18**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	1	50	383	197	2	-
Iceland	425	137	137	134	1	-2
Namibia	-	-	-	-	-	-
Norway	23.450	14.541	14.493	12.140	96	-16
Russia	514	1.018	345	132	1	-62
South Africa	-	-	-	-	-	-
Fillet, fresh	**5.928**	**9.749**	**6.687**	**8.853**	**100**	**32**
of it from Faroe Islands	2.909	6.653	2.695	3.990	45	48
Iceland	2.204	2.313	2.753	4.236	48	54
Norway	815	783	1.225	627	7	-49
Fillet, frozen	**87.724**	**75.486**	**85.672**	**75.576**	**100**	**-12**
of it from Argentina	-	-	-	-	-	-
Chile	13	17	-	-	-	-
China	23.591	18.055	16.088	17.660	23	10
Faroe Islands	22.169	22.352	22.172	19.854	26	-10
Iceland	33.006	26.043	40.727	33.578	44	-18
Namibia	-	-	-	-	-	-
New Zealand	-	3	-	-	-	-
Norway	8.357	7.206	5.233	4.030	5	-23
Russia	51	1.026	858	200	0	-77
South Africa	-	-	-	-	-	-
Meat, frozen	**4.091**	**5.124**	**4.802**	**3.591**	**100**	**-25**
of it from Argentina	-	-	-	-	-	-
China	134	397	743	686	19	-8
Iceland	1.594	1.497	1.157	656	18	-43
Faroe Islands	2.208	3.051	2.703	2.221	62	-18
Namibia	-	-	-	-	-	-
Norway	155	179	193	28	1	-85
Russia	-	-	6	-	-	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	185.760	163.174	171.830	151.637	100	-12
of it catches of quoted species	53.549	47.986	48.970	41.635	27	-15
import from third countries	132.211	115.188	122.860	110.002	73	-10
of it from Iceland	38.274	30.763	45.060	38.892	35	-14
Faroer Islands	28.045	32.383	28.120	26.600	24	-5
Norway	41.321	30.743	31.025	25.556	23	-18
China c)	23.742	18.452	16.844	18.347	17	9
Russia c)	565	2.044	1.209	332	0	-73

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.-

Published by: AIPCE 2015

Tab. 4.6 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for redfish a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**13.218**	**11.900**	**11.662**	**12.513**	**100**	**7**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	601	477	423	335	3	-21
Iceland	10.087	9.162	8.943	10.270	82	15
Namibia	-	-	-	-	-	-
Norway	2.470	2.208	2.285	1.906	15	-17
Russia	-	-	-	-	-	-
Whole, frozen	**20.458**	**14.519**	**16.506**	**18.127**	**100**	**10**
of it from Argentina	1	-	-	-	-	-
Faroe Islands	410	84	336	709	4	111
Iceland	12.726	10.479	12.151	11.636	64	-4
Namibia	-	-	-	-	-	-
Norway	994	558	981	1.732	10	77
Russia	2.351	1.164	715	1.210	7	69
Fillet, fresh	**5.780**	**5.405**	**4.911**	**4.950**	**100**	**1**
of it from Faroe Islands	-	-	-	-	-	-
Iceland	5.756	5.378	4.893	4.935	100	1
Norway	20	22	16	12	0	-22
Fillet, frozen	**20.568**	**17.546**	**20.358**	**19.778**	**100**	**-3**
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	11.789	9.282	10.375	10.478	53	1
Faroe Islands	163	86	299	76	0	-75
Iceland	8.343	7.565	8.854	8.734	44	-1
Namibia	-	-	-	-	-	-
New Zealand	6	-	-	-	-	-
Norway	35	26	9	18	0	100
Russia	-	-	-	-	-	-
Meat, frozen	**413**	**367**	**439**	**383**	**100**	**-13**
of it from Argentina	-	-	-	-	-	-
China	73	69	8	37	10	344
Faroe Islands	-	-	-	-	-	-
Iceland	304	297	430	346	90	-20
Namibia	-	-	-	-	-	-
Norway	-	-	-	-	-	-
Russia	-	-	-	-	-	-
Supply (Catches + Import)	80.293	67.686	74.114	74.701	100	1
of it catches of quoted species	19.856	17.949	20.239	18.949	25	-6
import from third countries	60.437	49.737	53.875	55.752	75	3
of it from Iceland	37.217	32.881	35.270	35.921	64	2
China c)	11.904	9.351	10.387	10.550	19	2
Norway	3.519	2.814	3.290	3.669	7	11
Russia c)	2.351	1.164	715	1.210	2	69
Faroe Islands	1.174	646	1.058	1.119	2	6
USA c)	98	582	804	402	1	-50
Canada c)	84	1	0	97	0	-
India c)	30	116	42	66	0	57
Thailand c)	-	-	-	37	0	-
Vietnam c)	194	-	13	20	0	56

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.-

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Tab. 4.7 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for haddock a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**34.310**	**32.397**	**30.163**	**29.740**	**100**	**-1**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	3.268	2.176	2.732	2.481	8	-9
Iceland	6.736	6.466	4.790	3.154	11	-34
Namibia	-	-	-	-	-	-
Norway	24.306	23.756	22.641	24.105	81	6
Russia	-	-	-	-	-	-
USA	-	-	-	-	-	-
Whole, frozen	**35.724**	**40.748**	**20.304**	**22.956**	**100**	**13**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	552	649	356	354	2	-1
Iceland	275	162	16	28	0	71
Namibia	-	-	-	-	-	-
Norway	30.599	35.290	17.019	21.199	92	25
Russia	4.257	4.521	2.913	1.146	5	-61
USA	-	-	-	-	-	-
Fillet, frozen	**103.018**	**104.117**	**77.567**	**57.928**	**100**	**-25**
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	36.580	35.465	25.793	17.015	29	-34
Faroe Islands	1.235	1.262	1.525	1.519	3	0
Iceland	18.359	16.490	17.259	13.257	23	-23
Namibia	-	-	-	-	-	-
New Zealand	-	-	-	-	-	-
Norway	21.797	19.679	9.824	5.624	10	-43
Russia	22.777	28.649	21.555	19.388	33	-10
USA	21	-	-	148	0	-
Meat, frozen	**2.977**	**2.837**	**2.847**	**2.336**	**100**	**-18**
of it from Argentina	-	-	-	-	-	-
China	1.116	1.087	1.055	886	38	-16
Faroe Islands	92	283	262	203	9	-22
Iceland	1.445	1.250	1.138	979	42	-14
Namibia	-	-	-	-	-	-
Norway	61	198	392	238	10	-39
Russia	190	20	-	-	-	-
USA	-	-	-	-	-	-
Supply (Catches + Import)	222.320	237.238	188.576	163.546	100	-13
of it catches of quoted species	46.291	57.138	57.696	50.586	31	-12
import from third countries	176.029	180.100	130.880	112.960	69	-14
ot it from Norway	76.763	78.923	49.876	51.166	45	3
Russia	27.223	33.190	24.468	20.534	18	-16
China c)	37.696	36.587	26.848	17.901	16	-33
Iceland	26.816	24.367	23.203	17.418	15	-25
Faroe Islands	5.146	4.370	4.875	4.556	4	-7
USA	21	-	-	148	0	-

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 (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for hake a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**32.352**	**26.884**	**22.785**	**19.064**	**100**	**-16**
of it from Argentina	301	-	-	-	-	-
Chile	7.300	5.230	5.166	4.000	21	-23
Namibia	4.843	4.564	5.550	4.669	24	-16
Norway	907	1.196	1.344	1.240	7	-8
Peru	-	-	-	-	-	-
USA	952	557	69	216	1	212
South Africa	11.316	8.273	5.346	4.226	22	-21
Uruguay	-	-	-	-	-	-
Whole, frozen	**58.840**	**54.825**	**53.544**	**55.164**	**100**	**3**
of it from Argentina	13.976	10.451	11.517	11.835	21	3
Chile	8.855	7.937	8.098	4.912	9	-39
Namibia	8.724	9.911	6.530	7.871	14	21
Norway	499	404	863	1.733	3	101
Peru	896	1.464	1.041	1.705	3	64
USA	894	532	104	842	2	706
South Africa	17.594	19.353	20.006	18.608	34	-7
New Zealand	3.168	2.637	2.654	3.289	6	24
Fillet, frozen	**325.936**	**276.780**	**305.240**	**307.792**	**100**	**1**
of it from Argentina	83.863	58.185	78.965	68.812	22	-13
Chile	5.547	4.613	7.138	2.891	1	-60
China	8.569	7.359	8.179	9.098	3	11
Namibia	117.263	118.758	116.716	114.478	37	-2
Peru	17.251	13.393	17.873	20.964	7	17
Norway	71	12	26	49	0	87
South Africa	39.173	35.180	36.460	43.844	14	20
Uruguay	25.054	13.736	14.143	9.136	3	-35
USA	28.613	27.429	24.426	38.054	12	56
Meat, frozen	**51.252**	**41.130**	**39.877**	**33.124**	**100**	**-17**
of it from Argentina	6.548	4.687	4.835	4.663	14	-4
Chile	6.471	7.169	5.627	3.480	11	-38
China	-	-	-	54	0	-
Namibia	20.400	15.730	17.076	14.883	45	-13
Norway	-	-	-	-	-	-
Peru	1.893	1.003	680	1.600	5	135
USA	11.144	9.990	7.403	5.038	15	-32
South Africa	1.408	980	1.628	1.485	4	-9
Uruguay	3.253	1.545	2.551	1.888	6	-26
Supply (Catches + Import)	529.487	461.546	493.179	502.960	100	2
of it catches of quoted species	61.106	61.927	71.734	87.816	17	22
import from third countries	468.381	399.619	421.445	415.144	83	-1
of it from Namibia	151.229	148.963	145.872	141.901	34	-3
Argentina	104.688	73.323	95.317	85.310	21	-10
South Africa	69.491	63.787	63.441	68.163	16	7
USA	41.604	38.508	32.003	44.150	11	38
Peru	20.040	15.860	19.595	24.269	6	24
Chile	28.173	24.949	26.029	15.283	4	-41
Uruguay	30.914	16.416	17.877	12.684	3	-29
China c)	8.569	7.471	8.308	9.238	2	11
New Zealand c)	3.242	2.667	2.755	3.620	3	31
Norway	1.476	1.612	2.234	3.022	1	35

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.-

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Tab. 4.9 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for Alaska-pollock and pollock a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh c)	**746**	**605**	**529**	**579**	**100**	**10**
or it from Argentina	-	-	-	-	-	-
Faroe Islands	3	0	-	1	0	-
Norway	710	596	528	577	100	9
Russia	-	-	-	-	-	-
South Korea	-	-	-	-	-	-
Vietnam	-	-	-	-	-	-
USA	-	-	-	-	-	-
Whole, frozen d)	**1.185**	**999**	**996**	**2.224**	**100**	**123**
of it from Argentina	-	-	-	-	-	-
Faroe Islands	-	-	-	-	-	-
Namibia	-	-	-	-	-	-
Norway	306	-	-	-	-	-
Russia	2	106	107	-	-	-100
South Korea	1	16	8	5	0	-34
Vietnam	-	-	-	-	-	-
USA	662	849	786	2.147	97	173
Fillet, frozen e)	**800.068**	**783.358**	**780.808**	**788.635**	**100**	**1**
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	419.754	390.981	397.960	386.038	49	-3
Faroe Islands	-	-	-	-	-	-
Namibia	-	-	-	-	-	-
Norway	142	41	69	12	0	-82
Russia	88.959	73.609	110.165	87.151	11	-21
South Korea	176	1.586	1.101	61	0	-94
Vietnam	563	120	1.775	3.031	0	71
USA	289.993	316.834	269.564	311.906	40	16
Meat, frozen e)	**51.859**	**65.520**	**52.889**	**63.488**	**100**	**20**
of it from Argentina	-	-	-	-	-	-
China	7.064	8.907	5.631	7.542	12	34
Faroes Islands	-	-	-	-	-	-
Norway	-	-	-	-	-	-
Russia	7.418	7.801	8.471	11.729	18	38
South Korea	-	466	245	164	0	-33
Vietnam	-	-	-	-	-	-
USA	37.537	48.343	38.370	44.053	69	15
Supply (Catches + Import)	853.857	850.482	835.222	854.926	100	2
of it catches of quoted species	-	-	-	-	-	-
import from third countries	853.857	850.482	835.222	854.926	100	2
of it from China f)	426.949	399.916	403.606	393.617	46	-2
USA	328.192	366.025	308.720	358.106	42	16
Russia	96.379	81.516	118.743	98.880	12	-17
Vietnam	563	120	1.775	3.031	0	71
Norway	1.158	638	597	590	0	-1
South Korea	177	2.068	1.354	230	0	-83
Canada f)	182	71	80	44	0	-45
Faroe Islands	3	0	-	1	0	-
South Africa f)	-	7	-	-	-	-
New Zealand f)	-	18	1	-	-	-

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 (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for hoki a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**d)**	**d)**	**d)**	**d)**		
of it from Argentina	d)	d)	d)	d)		
China	d)	d)	d)	d)		
Faroe Islands	d)	d)	d)	d)		
Norway	d)	d)	d)	d)		
Russia	d)	d)	d)	d)		
Thailand	d)	d)	d)	d)		
USA	d)	d)	d)	d)		
Whole, frozen	**146**	**94**	**93**	**122**	**100**	**31**
of it from Argentina	-	-	-	-	-	-
China	34	-	-	-	-	-
French South. Territ.	91	81	91	112	92	23
New Zealand	21	13	2	10	8	400
Norway	-	-	-	-	-	-
Thailand	-	-	-	-	-	-
USA	-	-	-	-	-	-
Fillet, frozen	**49.583**	**42.359**	**46.388**	**44.563**	**100**	**-4**
of it from Argentina	8	136	58	51	0	-
Chile	188	-	-	23	0	-
China	12.110	9.593	9.218	10.922	25	18
Faroe Islands	-	-	-	-	-	-
New Zealand	36.887	31.112	36.192	33.050	74	-9
Norway	-	50	-	-	-	-
Thailand	-	71	5	-	-	-100
USA	64	-	107	63	0	-
Meat, frozen	**d)**	**d)**	**d)**	**d)**		
of it from Argentina	d)	d)	d)	d)		
China	d)	d)	d)	d)		
Faroe Islands	d)	d)	d)	d)		
Norway	d)	d)	d)	d)		
Russia	d)	d)	d)	d)		
Thailand	d)	d)	d)	d)		
USA	d)	d)	d)	d)		
Supply (Catches + Import)	49.729	42.453	46.481	44.685	100	-4
of it catches of quoted species	-	-	-	-	-	-
import from third countries	49.729	42.453	46.481	44.685	100	-4
of it from New Zealand c)	36.908	31.125	36.194	33.060	74	-9
China	12.144	9.593	9.218	10.922	24	18
Faroe Islands c)	91	81	91	112	0	23
USA c)	64	-	107	63	0	-
Argentina c)	8	136	58	51	0	-12
Chile c)	188	-	-	23	0	-
Thailand	-	71	5	-	-	-
Norway	-	50	-	-	-	-

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 (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for plaice a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**3.261**	**3.676**	**3.460**	**3.020**	**100**	**-13**
of it from Faroe Islands	219	237	151	119	4	-22
Iceland	1.350	2.021	2.055	2.032	67	-1
Norway	1.692	1.418	1.254	869	29	-31
Russia	-	-	-	-	-	-
USA	-	-	-	-	-	-
Whole, frozen	**297**	**232**	**142**	**346**	**100**	**145**
of it from Faroe Islands	5	25	2	9	3	473
Iceland	47	17	53	3	1	-94
Norway	0	3	3	1	0	-60
Russia	4	2	-	-	-	-
USA	0	-	-	-	-	-
Fillet, frozen	**1.997**	**1.944**	**1.914**	**1.903**	**100**	**-1**
of it from China	204	42	-	6	0	-
Faroe Islands	3	1	4	-	-	-100
Iceland	1.791	1.901	1.863	1.897	100	2
Norway	-	-	-	-	-	-
Russia	-	-	-	-	-	-
USA	-	-	47	-	-	-
Supply (Catches + Import)	82.769	92.189	99.312	91.524	100	-8
of it catches of quoted species	77.214	86.337	93.796	86.255	94	-8
import from third countries	5.555	5.852	5.516	5.269	6	-4
of it from Iceland	3.188	3.940	3.970	3.932	75	-1
Norway	1.693	1.421	1.257	870	17	-31
Faroe Islands	227	263	157	127	2	-19
China c)	305	64	8	6	0	-18
USA	0	-	47	-	-	-
Russia	4	2	-	-	-	-

Notes: a) Pleuronectes Platessa.- b) Selected countries, which are most important for EU supply with plaice.- c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.12 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for surimi a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Surimi, frozen	**213.116**	**204.250**	**210.009**	**215.011**	**100**	**2**
of it from Argentina	2.476	2.191	872	1.516	1	74
Chile	5.636	4.895	2.850	813	0	-71
China	688	327	327	248	0	-24
Faroe Islands	614	529	-	369	0	-
India	12.568	12.849	16.377	6.101	3	-63
Russia	172	-	-	86	0	-
Thailand	10.859	7.313	2.279	4.899	2	115
USA	115.162	111.424	151.158	160.485	75	6
Vietnam	58.047	61.647	33.746	37.073	2	10
Surimipresentation, frozen	**64.444**	**56.029**	**52.893**	**51.692**	**100**	**-2**
of it from China	24.442	21.677	18.170	20.361	39	12
India	14.826	12.696	10.647	10.525	20	-1
Japan	392	288	382	259	1	-32
Malaysia	416	583	657	850	2	29
Peru	34	-	-	-	-	-
Russia	-	-	-	2	0	-
South Korea	3.705	3.180	3.618	4.147	8	15
Thailand	19.034	16.453	18.264	14.179	27	-22
USA	263	109	120	152	0	27
Supply (Catches + Import)	277.560	260.279	262.902	266.703	101	1
of it catches of quoted species	-	-	-	-	-	0
import from third countries	277.560	260.279	262.902	266.703	101	1
of it from USA	115.425	111.533	151.279	160.638	58	6
Vietnam c)	59.041	62.399	34.360	38.094	13	11
China c)	25.130	22.004	18.497	20.610	7	11
Thailand	29.893	23.765	20.543	19.078	8	-7
India	27.394	25.545	27.024	16.625	10	-38
South Korea c)	3.705	3.180	3.618	4.147	1	15
Argentina c)	2.476	2.191	872	1.516	0	74
Malaysia c)	416	583	657	850	0	29
Chile c)	5.636	4.895	2.850	813	1	-71
Peru c)	5.732	3.058	1.859	778	1	-58
Japan c)	392	288	382	259	0	-32
Singapore	209	210	211	43	0	-80

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 (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for freshwater fish a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012 d)	2013 d)	2014 d)	2014	14/13
Whole, fresh	**2.736**	**758**	**391**	**93**	**100**	**-76**
of it from Canada	9	12	14	10	11	-
Russia	50	69	24	22	23	-9
Uganda	1.993	556	307	57	61	-81
Whole, frozen	**41.364**	**16.991**	**19.308**	**18.444**	**100**	**-4**
of it from Bangladesh	4.268	2.254	2.175	2.268	12	4
China	13.532	2.587	3.092	2.689	15	-13
India	1.127	459	340	833	5	145
Kasachstan	338	249	218	333	2	53
Myanmar	5.915	5.830	8.392	6.473	35	-23
Russia	159	117	133	159	1	20
Tanzania	1.098	42	139	115	1	-17
Thailand	3.899	835	453	776	4	71
Turkey	3.513	3.128	3.282	3.582	19	9
Vietnam	2.473	633	448	382	2	-15
Fillet, fresh	**3.439**	**486**	**313**	**193**	**100**	**-38**
of it from Iceland	181	41	87	27	14	-
Norway	0	155	130	105	55	-
Fillet, frozen	**50.707**	**39.513**	**41.898**	**38.782**	**100**	**-7**
of it from Argentina	58	-	60	191	0	219
Canada	685	405	687	500	1	-27
China	11.875	10.023	11.200	1.970	5	-82
Iceland	679	385	468	614	2	31
Kasachstan	13.766	15.002	16.197	15.236	39	-6
Russia	6.993	5.069	6.143	6.387	16	-
Vietnam	14.764	6.472	4.601	629	2	-86
Meat, fresh	**3.223**	**1.721**	**1.492**	**799**	**100**	**-46**
of it from Iceland	162	437	541	702	88	30
Russia	-	404	479	387	48	-19
Sri Lanka	401	418	324	180	22	-45
Uganda	-	605	189	138	17	-27
Meat, frozen	**8.353**	**7.919**	**10.284**	**9.420**	**100**	**-8**
of it from Canada	1.251	1.021	1.304	1.022	11	-22
Chile	1.708	2.548	4.871	4.225	45	-13
China	1.519	615	951	1.139	12	20
Faroe Islands	57	883	1.026	705	7	-31
USA	446	242	512	666	7	30
Vietnam	2.364	2.102	1.103	963	10	-13
Supply (Catches + Import)	109.821	67.388	73.686	67.732	100	-8
of it catches of quoted species	-	-	-	-	-	-
import from third countries	109.821	67.388	73.686	67.732	100	-8
of it from Kasachstan c)	14.104	15.305	16.506	15.584	23	-6
Russia c)	7.865	5.809	6.883	7.169	11	4
Myanmar c)	5.915	5.830	8.392	6.473	10	-23
China c)	27.132	13.308	15.414	5.797	9	-62
Chile c)	1.883	2.610	4.883	4.233	6	-13
Turkey c)	3.513	3.128	3.282	3.594	5	10
Bangladesh c)	4.268	2.254	2.186	2.392	4	9
Vietnam c)	19.601	9.245	6.161	2.051	3	-67
Canada c)	2.038	1.501	2.063	1.597	2	-23
Iceland c)	1.059	863	1.100	1.343	2	22

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 (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for pangasius

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013 b)	2014 b)	2014	14/13
Fillet, fresh	**5.885**	**16.664**	**5.637**	**1.936**	**100**	**-66**
of it from Bangladesh	-	-	-	-	-	-
China	-	109	98	47	2	-52
Ecuador	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-
Kenya	-	-	-	-	-	-
Thailand	-	13	-	-	-	-
Tanzania	-	-	-	-	-	-
Uganda	-	-	-	-	-	-
Vietnam	5.885	16.395	5.315	1.718	89	-68
Zimbabwe	-	-	-	-	-	-
Fillet, frozen	**611.192**	**476.678**	**473.019**	**429.854**	**100**	**-9**
of it from Bangladesh	130	146	-	6	0	-
China	1.235	987	335	135	0	-60
Ecuador	-	-	-	-	-	-
Indonesia	49	-	1	3	0	-
Kenya	-	-	-	-	-	-
Thailand	98	44	26	-	-	-100
Tanzania	-	-	-	-	-	-
Uganda	-	-	-	-	-	-
Vietnam	609.648	475.200	472.329	429.360	100	-9
Zimbabwe	-	-	-	-	-	-
Supply (Catches + Import)	617.077	493.342	478.656	431.790	100	-10
of it catches of quoted species	-	-	-	-	-	-
import from third countries	617.077	493.342	478.656	431.790	100	-10
of it from Vietnam	615.533	491.595	477.643	431.077	100	-10
China	1.235	1.096	433	182	0	-58
Bangladesh	130	146	-	6	0	-
Indonesien	49	-	1	3	0	150

Note: a) Selected countries, which are most important for EU supply with pangasius.- b) Including other catfish species.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.15 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for nile perch

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Fillet, fresh	**46.804**	**47.005**	**42.383**	**34.220**	**100**	**-19**
of it from Bangladesh	-	-	-	-	-	-
China	-	27	-	-	-	-
Ecuador	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-
Kenya	5.137	5.190	4.982	4.123	12	-17
Thailand	-	-	-	-	-	-
Tanzania	22.717	20.386	17.865	14.761	43	-17
Uganda	18.944	21.382	19.521	15.321	45	-22
Vietnam	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-
Fillet, frozen	**14.827**	**19.021**	**15.467**	**16.539**	**100**	**7**
of it from Bangladesh	-	-	-	-	-	-
China	-	-	-	-	-	-
Ecuador	-	-	-	-	-	-
Indonesia	47	-	-	-	-	-
Kenya	1.094	1.629	1.377	1.251	8	-9
Thailand	-	-	-	-	-	-
Tanzania	10.625	13.615	9.732	11.490	69	18
Uganda	2.953	3.777	4.358	3.743	23	-14
Vietnam	107	-	-	56	0	-
Zimbabwe	-	-	-	-	-	-
Supply (Catches + Import)	61.631	66.025	57.850	50.759	100	-12
of it catches of quoted species	-	-	-	-	-	-
import from third countries	61.631	66.025	57.850	50.759	100	-12
of it from Tanzania	33.342	34.001	27.597	26.252	52	-5
Uganda	21.897	25.159	23.879	19.064	38	-20
Kenya	6.230	1.629	1.377	1.251	2	-9
Vietnam	107	-	-	56	0	-
Indonesia	47	-	-	-	-	-
China	-	27	-	-	-	-

Note: a) Selected countries, which are most important for EU supply with nile perch.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.16 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for tilapia

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**85**	**2**	**3**	**2**	**100**	**-25**
of it from Bangladesh	-	-	-	-	-	-
China	56	-	-	-	-	-
Ecuador	8	1	-	-	-	-
Indonesia	-	-	-	-	-	-
Kenya	-	-	-	-	-	-
Thailand	10	-	-	-	-	-
Vietnam	11	-	-	-	-	-
Zimbabwe	-	-	1	-	-	-
Whole, frozen	**-**	**12.789**	**14.210**	**12.847**	**100**	**-10**
of it from Bangladesh	-	17	6	3	0	-43
China	-	10.353	12.465	8.832	69	-29
Ecuador	-	65	-	-	-	-
Indonesia	-	346	560	529	4	-6
Kenya	-	21	-	-	-	-
Thailand	-	1.590	394	1.917	15	386
Vietnam	-	257	688	1.397	11	103
Zimbabwe	-	-	-	-	-	-
Fillet, fresh	**-**	**1.068**	**746**	**534**	**100**	**-28**
of it from Bangladesh	-	-	-	-	-	-
China	-	289	304	349	65	15
Ecuador	-	572	283	-	-	-100
Indonesia	-	-	-	-	-	-
Kenya	-	-	-	-	-	-
Thailand	-	7	-	-	-	-
Vietnam	-	1	33	54	10	-
Zimbabwe	-	194	122	130	24	6
Fillet, frozen	**42.008**	**35.347**	**42.717**	**39.772**	**100**	**-7**
of it from Bangladesh	-	-	51	97	0	-
China	36.206	31.001	35.551	26.994	68	-24
Ecuador	147	116	36	-	-	-100
Indonesia	3.774	2.976	4.223	4.648	12	10
Kenya	-	-	-	-	-	-
Thailand	699	389	477	472	1	-1
Vietnam	944	299	2.176	7.259	18	234
Zimbabwe	-	-	-	-	-	-
Supply (Catches + Import)	42.093	49.205	57.676	53.155	100	-8
of it catches of quoted species	-	-	-	-	-	-
import from third countries	42.093	49.205	57.676	53.155	100	-8
of it from China	36.262	41.642	48.321	36.175	68	-25
Vietnam	955	557	2.897	8.709	16	201
Indonesia	3.774	3.322	4.783	5.177	10	8
Thailand	709	1.985	871	2.388	4	174
India b)	-	118	97	145	0	48
Zimbabwe	-	194	123	130	0	5
Bangladesh	-	17	57	100	0	77
Ecuador	154	753	319	-	-	-

Note: a) Selected countries, which are most important for EU supply with tilapia.- b) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2015

Tab. 4.17 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for sea bream

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**6.654**	**11.886**	**13.483**	**18.649**	**100**	**38**
of it (D. dentex, Pagellus spp.)	**2.002**	**1.876**	**3.455**	**2.151**	**100**	**-38**
of it from Morocco	388	313	357	376	17	5
Mauritania	73	30	46	32	1	-31
New Zealand	31	12	9	11	1	20
Oman	64	20	12	16	1	33
Senegal	8	25	25	23	1	-8
Tunisia	4	11	15	10	0	-32
Turkey	1.412	1.462	2.987	1.681	78	-44
of it (Sparus aurata)	**4.653**	**7.128**	**6.295**	**11.780**	**100**	**87**
of it from Egypt	0	0	3	4	0	17
Morocco	110	85	60	71	1	18
Mauritania	73	12	6	4	0	-34
Senegal	1	1	11	1	0	-96
Tunisia	12	2	1	7	0	450
Turkey	4.382	6.373	6.183	11.695	99	89
of it (other species)	**-**	**2.881**	**3.733**	**4.718**	**100**	**26**
of it from Argentina	-	21	120	35	1	-70
Faroe Islands	-	523	473	802	17	69
Morocco	-	876	1.070	1.106	23	3
Mauritania	-	1.068	1.476	2.023	43	37
New Zealand	-	23	23	31	1	35
Oman	-	97	157	184	4	18
Senegal	-	231	340	467	10	37
Whole, frozen	**2.503**	**2.948**	**3.592**	**3.592**	**100**	**0**
of it (D. dentex, Pagellus spp.)	**2.503**	**1.390**	**2.080**	**1.821**	**100**	**-12**
of it from Argentina	184	79	40	33	2	-18
Morocco	778	732	777	1.213	67	56
Mauritania	140	92	582	253	14	-57
New Zealand	108	234	281	166	9	-41
Turkey	355	15	22	33	2	51
Yemen	-	118	124	106	6	-15
of it (Sparus aurata)	**-**	**1.557**	**1.512**	**1.771**	**100**	**17**
of it from Albania	-	1	26	22	1	-15
Morocco	-	39	8	234	13	2702
Mauritania	-	1	13	4	0	-69
Peru	-	-	-	3	0	-
Senegal	-	0	-	13	1	-
Turkey	-	1.516	1.464	1.496	84	2
Supply (Catches+Production+ Import)	104.234	123.498	128.124	127.929	100	0
of it catches of quoted species b)	888	1.009	963	1.094	1	14
EU-aquaculture c)	94.188	107.656	110.087	104.594	82	-5
import from third countries	9.158	14.833	17.074	22.241	17	30
of it from Turkey d)	6.149	9.370	10.666	14.905	67	40
Morocco	1.277	2.046	2.273	2.999	13	32
Mauritania d)	287	1.203	2.122	2.315	10	9
Faroe Islands	-	523	473	802	4	69
Senegal	504	280	576	504	2	-13
New Zealand	138	270	313	209	1	-33
Oman d)	64	117	190	200	1	5
Yemen	-	118	124	106	0	-15

Note: a) Selected countries, which are most important for EU supply with sea bream.- b) Blackspot (=red) sea bream.-c) Data for 2011-2014 taken from FEAP.- d) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report; FEAP.-

Published by: AIPCE 2015

Tab. 4.18 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for sea bass

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**8.355**	**7.842**	**12.968**	**15.523**	**100**	**20**
of it (Dicentrachus labrax)	**8.355**	**7.701**	**12.961**	**15.520**	**100**	**20**
of it from Albania	-	-	62	115	1	87
Egypt	0	6	17	17	0	1
Morocco	-	11	17	13	0	-23
Mauritius	1	2	4	7	0	75
Tunisia	7	10	2	2	0	29
Turkey	-	-	-	-	-	-
USA	0	-	1	1	0	-45
of it (others)	**-**	**141**	**7**	**3**	**100**	**-58**
of it from Egypt	-	-	0	1	17	67
Turkey	-	132	7	2	67	-69
USA	-	2	0	1	17	25
Whole, frozen	**527**	**671**	**736**	**1.003**	**100**	**26**
of it (Dicentrachus labrax)	**527**	**654**	**683**	**861**	**100**	**67**
of it from Albania	-	2	24	41	5	67
Turkey	503	653	659	821	95	25
of it (others)	**-**	**17**	**53**	**141**	**100**	**263**
of it from Mauritania	-	7	4	15	11	263
Senegal	-	-	-	96	68	-
Tunisia	-	0	2	18	12	762
Turkey	-	8	17	12	8	-29
Supply (Catches+Production+ Import)	82.716	77.754	90.210	90.240	100	0
of it catches of quoted species	-	-	-	-	-	-
EU-aquaculture b)	73.835	69.241	76.505	73.714	82	-4
import from third countries	8.881	8.513	13.705	16.526	18	21
of it from Turkey	8.742	8.464	13.541	16.199	98	20
Albania c)	-	3	86	156	1	81
Senegal c)	-	0	-	96	1	-
Tunisia c)	7	11	4	20	0	435
Egypt c)	0	6	17	17	0	3
Mauritania c)	6	7	4	15	0	263
Morocco c)	-	11	17	13	0	-23
Mauritius c)	1	6	4	7	0	75
USA c)	0	2	2	1	0	-

Note: a) Selected countries, which are most important for EU supply with sea bass.- b) Data for 2011-2014 taken from FEAP.-
c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report; FEAP.-
Published by: AIPCE 2015

Tab. 4.19 Overview of the adjusted rates of conversion

	COD		POK		RED		AP		SAL		Freshwater fish		PANGASIUS		SURIMI		TUNA	
	adj.	official	adj.	official	adj.	official	adj.	official	adj.	official	adj.	official	adj.	official	adj.	official	adj.	official
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.- official: rates taken from member states.- adj.: adjusted by using information from the sector.-
Published by: AIPCE 2015

Tab. 5.1 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for salmon a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**602.806**	**696.934**	**687.186**	**770.572**	**100**	**12**
of it from Canada	124	124	264	292	0	10
Chile	7	50	73	91	0	25
Faroe Islands	38.421	42.615	42.409	37.015	5	-13
Iceland	-	192	140	379	0	171
Norway	564.159	653.847	643.957	732.694	95	14
USA	95	71	96	61	0	-37
Whole, frozen	**14.201**	**20.348**	**30.959**	**31.574**	**100**	**2**
of it from Canada	738	992	1.314	2.377	8	81
Chile	334	1.355	4.370	5.094	16	17
China	1.330	735	402	264	1	-34
Faroe Islands	24	-	1.529	2.150	7	-
Iceland	-	15	103	72	0	-30
Norway	3.203	4.988	4.889	3.920	12	-20
Thailand	24	-	-	-	-	-
USA	18.733	12.258	16.821	17.132	54	2
Fillet, fresh	**108.272**	**145.358**	**140.683**	**138.854**	**100**	**-1**
of it from Canada	171	118	228	284	0	24
Chile	310	1.206	1.175	475	0	-60
China	344	1.603	1.849	1.050	1	-43
Faroe Islands	-	495	1.080	3.459	2	220
Iceland	-	8	2	2	0	-33
Norway	107.393	141.810	136.246	133.487	96	-2
USA	51	58	56	95	0	71
Fillet, frozen	**170.214**	**167.958**	**201.870**	**220.988**	**100**	**9**
of it from Canada	597	474	641	1.400	1	118
Chile	24.061	30.184	59.426	57.054	26	-4
China	83.231	65.203	65.650	86.356	39	32
Faroe Islands	16.242	19.088	22.510	23.558	11	5
Iceland	85	2	3	281	0	11120
Norway	35.545	43.352	43.163	41.486	19	-4
Thailand	309	218	116	119	0	3
USA	7.840	8.252	8.386	9.038	4	8
Salmon prepared	**48.761**	**41.713**	**40.298**	**43.982**	**100**	**9**
of it from Canada	8.285	9.258	6.295	7.336	17	17
Chile	161	268	154	210	0	36
China	3.921	3.582	3.604	2.739	6	-24
Faroe Islands	-	-	1	-	-	-
Iceland	14	99	104	34	0	-67
Norway	1.313	1.022	1.204	985	2	-18
Thailand	1.907	1.767	1.757	1.221	3	-31
USA	32.929	24.998	26.614	30.582	70	15
Supply (Catches, Aquaculture+Import)	1.107.523	1.247.413	1.275.007	1.380.082	100	8,2
of it catches of quoted species	569	579	477	465	0	-3
EU-aquaculture c)	162.700	174.523	173.534	173.647	13	0
import from third countries	944.254	1.072.311	1.100.996	1.205.970	87	10
of it from Norway d)	711.612	845.018	829.458	912.572	76	10
China d)	88.826	71.122	71.505	90.409	7	26
Faroe Islands	54.687	62.197	67.529	66.183	5	-2
Chile d)	24.873	33.063	65.197	62.923	5	-3
USA	59.648	45.636	51.973	56.907	5	9
Canada	9.915	10.966	8.743	11.690	1	34
Russia d)	1.951	853	3.197	1.631	0	-49
Thailand	2.240	1.985	1.873	1.340	0	-28

Notes: a) Salmon salar and other salmon species.- b) Selected countries, which are most important for EU supply with salmon.-
c) Data for 2011-2014 taken from FEAP.- d) Incl. Quantities not listed above.-

Source: Eurostat-Comext; EU catch report; FEAP.-
Published by: AIPCE 2015

Tab. 5.2 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for tuna

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Live b)	**-**	**402**	**-**	**-**	**100**	-
Whole, fresh	**5.683**	**4.728**	**4.402**	**4.541**	**100**	3
of it **White Tuna (Th. alalunga)**	**830**	**361**	**141**	**262**	**100**	86
of it from Ecuador	-	-	-	-	-	-
of it **Yellow Tuna (Th. albacares)**	**4.367**	**3.942**	**3.968**	**3.973**	**100**	0
of it from Maledives	3.128	3.250	2.734	2.146	54	-21
of it **Bonito**	**125**	**23**	**0**	**1**	**100**	900
of it **Big-eye Tuna (Th. obesus)**	**39**	**29**	**69**	**122**	**100**	78
of it **Red Tuna b)**	**147**	**216**	**202**	**168**	**100**	-17
of it **other Tuna species**	**174**	**158**	**22**	**14**	**100**	-37
Whole, frozen	**205.870**	**200.469**	**195.285**	**215.219**	**100**	10
of it **White Tuna (Th. alalunga)**	**30.038**	**20.610**	**22.176**	**15.084**	**100**	-32
of it from Indonesia	4.686	1.414	6.676	1.414	9	-
South Africa	5.244	5.733	3.735	6.186	41	66
USA	4.501	5.461	4.260	5.474	36	28
of it **Yellow Tuna (Th. albacares)**	**125.034**	**125.721**	**120.989**	**125.371**	**100**	4
of it from Guatemala	3.792	3.846	7.738	7.926	6	2
Rep. Korea	15.709	15.798	3.353	9.372	7	180
Mexico	28.593	25.344	11.553	19.555	16	69
Panama	8.731	6.889	5.541	8.214	7	48
Phillipines	17.405	12.145	20.217	15.602	12	-23
of it **Bonito**	**40.303**	**45.934**	**42.169**	**62.862**	**100**	49
of it from Guatemala	2.986	3.889	4.964	5.903	9	19
Kap Verde	5.407	6.117	6.712	11.098	18	65
Panama	10.559	8.257	6.772	15.633	25	131
of it **Big-eye Tuna (Th. obesus)**	**9.863**	**7.587**	**9.627**	**11.531**	**100**	20
of it from Kap Verde	394	731	801	2.949	26	268
of it **Red Tuna b)**	**1**	**-**	**-**	**-**	**-**	-
of it **other Tuna species**	**631**	**347**	**301**	**371**	**100**	23
Fillets, fresh d)	**57.593**	**39.435**	**37.860**	**36.984**	**100**	-2
of it from Maledives	3.228	8.426	6.554	7.281	20	11
Sri Lanka	14.136	8.035	8.864	7.592	21	-14
Fillets, frozen	**24.308**	**26.319**	**29.892**	**36.903**	**100**	23
of it from Rep. Korea	1.501	3.128	4.325	7.204	20	67
Vietnam	9.523	9.247	9.791	10.730	29	10
Tuna, loins	**288.865**	**269.512**	**280.387**	**285.253**	**100**	2
of it from China	17.040	10.703	17.900	22.241	8	24
Ecuador	96.252	90.389	94.502	66.964	23	-29
Thailand	43.343	20.928	24.038	37.774	13	57
Tuna, prepared	**677.748**	**647.405**	**714.274**	**699.438**	**100**	-2
of it from Ecuador	124.417	128.182	146.343	153.392	22	5
Mauritius	76.610	81.634	87.837	96.492	14	10
Phillipines	61.959	53.768	52.079	54.158	8	4
Thailand	130.290	80.912	107.934	95.765	14	-11
Supply (Catches + Import)	1.244.070	1.190.248	1.265.560	1.286.698	100	2
of it catches of EU quoted tuna	41.596	41.413	41.321	45.344	4	10
import from third countries	1.202.474	1.148.835	1.224.239	1.241.354	96	1
of it from Ecuador c)	231.207	225.478	249.466	228.115	18	-9
Thailand c)	178.577	107.704	136.042	138.595	11	2
Mauritius c)	113.588	119.155	113.297	122.604	10	8
Seychelles c)	80.983	81.679	100.026	95.313	8	-5
Phillipines c)	81.016	67.562	82.063	83.825	7	2
Vietnam c)	28.762	34.602	42.907	45.581	4	6
Ivory Coast c)	48.657	65.221	63.766	43.543	4	-32
Ghana c)	54.573	56.083	45.022	45.364	4	1
Guatemala c)	26.115	32.333	31.935	29.110	2	-9
China c)	23.894	15.650	24.665	26.667	2	8

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 (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for herring a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**24.980**	**28.130**	**34.099**	**36.736**	**100**	**8**
of it from Faroe Islands	3.349	309	61	442	1	630
Norway	21.631	27.819	34.039	36.294	99	7
Whole, frozen	**55.794**	**43.619**	**48.346**	**39.886**	**100**	**-17**
of it from Canada	905	282	411	273	1	-34
China	-	-	-	-	-	-
Faroe Islands	9.751	4.736	9.231	1.464	4	-84
Iceland	1.918	1.506	1.102	917	2	-17
Norway	40.130	33.780	35.960	35.762	90	-1
Russia	-	-	782	-	-	-
South Corea	-	3	1.546	3.034	8	-
USA	2.457	3.111	1.600	1.346	3	-16
Herring flaps, fresh	**4.373**	**4.074**	**4.388**	**1.317**	**100**	**-70**
of it from Norway	4.373	4.070	4.375	1.312	100	-70
Herring fillets, frozen	**109.548**	**90.897**	**73.848**	**76.276**	**100**	**3**
of it from Canada	-	86	54	50	0	-7
Faroe Islands	1.141	2.521	3.799	-	-	-100
Iceland	30.012	23.175	23.673	15.188	20	-36
Norway	78.349	65.112	46.323	58.999	77	27
Herring flaps, frozen	**164.529**	**123.441**	**98.297**	**112.120**	**100**	**14**
of it from Canada	7.490	2.339	1.687	6.090	5	261
Faroe Islands	9.959	6.372	12.083	2.180	2	-82
Iceland	37.167	27.255	22.392	22.204	20	-1
Norway	109.913	87.475	62.135	78.734	70	27
Herring, smoked	**1.447**	**865**	**949**	**746**	**100**	**-21**
of it from Canada	1.299	771	932	746	100	-20
China	10	-	-	-	-	-
Norway	93	93	11	1	0	-95
Herring, salted	**1.187**	**1.206**	**1.600**	**960**	**100**	**-40**
of it from Canada	-	-	4	-	-	-
Norway	1.187	1.206	1.561	903	94	-42
Herring presentations, others	**39.625**	**31.605**	**28.634**	**26.903**	**100**	**-6**
of it from Iceland	600	906	1.628	1.483	6	-9
Norway	38.820	30.827	27.101	25.707	96	-5
Russia	3	-	-	-	-	-
Supply (Catches + Import)	937.782	1.009.196	1.027.715	1.037.554	100	1
of it catches of EU quoted herring	536.298	685.359	737.554	742.610	72	1
import from third countries	401.484	323.837	290.161	294.944	28	2
of it from Norway	294.496	250.382	211.505	237.712	81	12
Iceland	69.697	52.842	48.795	39.792	13	-18
Canada	9.693	3.479	3.087	7.158	2	132
Faroe Islands	24.201	13.938	25.173	4.086	1	-84
South Corea	-	3	1.546	3.034	1	-
USA	2.457	3.111	1.600	1.346	0	-16
Russia	3	-	782	-	-	-
China	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 (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for mackerel a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**3.776**	**18.035**	**1.721**	**7.222**	**100**	**320**
of it from Faroer Islands	1.111	-	-	-	-	-
Norway	2.653	18.021	1.714	7.203	100	320
Whole, frozen	**66.322**	**72.188**	**63.041**	**72.305**	**100**	**15**
of it from Argentina	6	-	27	15	0	-
Canada	2.865	318	51	394	1	679
China	2.429	2.470	1.589	1.642	2	3
Ecuador	24	-	39	299	0	-
Faroe Islands	34.137	35.833	28.741	32.049	44	12
Iceland	9.981	8.413	6.949	6.328	9	-9
Morocco	2.575	3.031	952	1.236	2	30
Norway	12.514	19.840	21.152	23.043	32	9
Peru	466	197	466	399	1	-14
Thailand	1	-	-	-	-	-
USA	25	930	290	616	1	113
Fillets, frozen c)	**7.769**	**8.163**	**10.389**	**8.143**	**100**	**-22**
of it from China	1.779	1.347	1.635	2.062	25	26
India	8	0	-	-	-	-
Norway	4.484	5.470	6.937	4.463	55	-36
Vietnam	39	5	-	-	-	-
Smoked	**5**	**7**	**3**	**6**	**100**	**57**
of it from China	-	2	-	-	-	-
Norway	3	2	2	1	23	-29
Prepared d)	**30.634**	**29.259**	**30.776**	**33.126**	**100**	**8**
of it from Albania	19	7	-	-	-	-
Chile	-	-	-	-	-	-
China	3.085	2.650	3.756	5.987	18	59
Kap Verde	5.460	4.409	2.996	4.577	14	53
Ecuador	631	721	172	804	2	368
Morocco	18.729	18.827	21.987	20.589	62	-6
Norway	8	12	47	13	0	-73
Peru	915	911	209	113	0	-46
Thailand	1.442	1.548	1.440	936	3	-35
Supply (Catches + Import)	463.026	493.522	439.324	706.299	100	61
of it catches of EU quoted mackerel	354.521	365.870	333.393	585.499	83	76
import from third countries	108.505	127.652	105.931	120.800	17	14
of it from Faroe Islands e)	35.275	35.833	29.287	32.198	27	10
Norway	17.006	25.323	28.137	27.519	23	-2
Morocco e)	21.427	21.914	23.067	21.837	18	-5
China	7.292	6.468	6.980	9.692	8	39
Kap Verde e)	5.460	4.409	2.996	4.577	4	53
Ecuador e)	860	852	211	1.103	1	423
Thailand e)	1.442	1.548	1.440	936	1	-35
USA e)	25	930	290	616	1	113
Peru e)	1.419	1.108	675	512	0	-24
Canada e)	2.865	318	51	394	0	679
Taiwan e)	681	321	-	24	0	-

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.- e) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-
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Tab. 5.5 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for anchovies

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**2.153**	**3.033**	**1.135**	**611**	**100**	**-46**
of it from Morocco	2.117	3.014	1.129	599	98	-47
Turkey	3	19	6	13	2	124
Smoked	**263**	**201**	**230**	**158**	**100**	**-32**
of it from Albania	61	30	23	16	10	-34
China	30	9	7	16	10	126
Korea (South)	11	3	6	8	5	44
Sri Lanka	-	-	3	2	2	-25
Thailand	113	99	119	99	63	-17
Tunisia	36	42	33	7	5	-78
Vietnam	9	10	5	9	6	76
Salted	**10.633**	**9.620**	**7.541**	**7.251**	**100**	**-4**
of it from Albania	183	164	69	87	1	26
Argentina	7.839	6.114	4.550	4.133	57	-9
Bosnia	826	356	145	38	1	-
China	111	237	137	191	3	40
India	-	2	-	12	0	-
Morocco	1.006	1.770	2.070	2.114	29	2
Peru	385	393	431	579	8	-
Tunisia	217	485	75	86	1	15
Turkey	28	-	-	7	0	-
Vietnam	-	-	4	3	0	-39
Supply (Catches+Import)	36.304	34.657	29.001	35.895	100	24
of it catches of quoted species	23.255	21.803	20.095	27.875	78	39
import from third countries	13.049	12.854	8.906	8.020	22	-10
of it from Morocco	3.123	4.784	3.199	2.712	34	-15
Argentina	7.839	6.114	4.550	4.133	52	-9
Peru	385	393	460	579	7	26
China	141	246	144	207	3	44
Albania b)	251	194	93	103	1	11
Thailand b)	115	99	119	99	1	-17
Tunisia	253	528	108	94	1	-13
Bosnia b)	848	356	145	38	0	-74
Turkey	31	19	6	20	0	254
India	-	2	1	12	0	2133
Vietnam b)	11	10	10	12	0	23

Note: a) Selected countries, which are most important for EU supply with anchovis.- b) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 5.6 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for sardines

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Whole, fresh	**45**	**9**	**22**	**34**	**100**	**57**
of it (Sardina pilchardus)	**44**	**9**	**22**	**34**	**100**	**55**
of it from Morocco	5	7	13	12	34	-9
Turkey	-	1	5	22	66	322
of it (genus Sardinops, Sardinella spp.)	**1**	**0**	**-**	**0**	**100**	**-**
of it from Albania	1	0	-	0	100	-
India	-	-	-	0	100	-
Whole, frozen	**31.429**	**38.517**	**57.267**	**47.143**	**100**	**-17**
of it (Sardina pilchardus)	**19.544**	**28.568**	**48.527**	**40.332**	**100**	**-77**
of it from Bosnia	-	-	154	35	0	-77
Chile	-	-	-	49	0	-
China	28	5	45	1	0	-98
Morocco	16.799	26.676	46.179	39.031	97	-15
Tunisia	2.597	1.882	2.136	1.206	3	-44
Turkey	30	5	11	10	0	-15
of it (genus Sardinops, Sardinella spp.)	**11.886**	**9.949**	**8.740**	**6.812**	**100**	**-29**
of it from Canada	-	40	2	2	0	-29
China	1	-	-	32	0	-
India	639	538	483	1.479	22	206
Morocco	10.573	8.410	7.121	4.730	69	-34
Mauretania	546	259	0	2	0	900
Oman	-	-	8	10	0	29
Senegal	16	42	37	34	0	-9
Thailand	98	153	181	75	1	-59
USA	8	488	658	410	6	-38
Vietnam	6	2	114	39	1	-66
Supply (Catches+Import)	43.360	48.475	66.029	53.989	100	-18
of it catches of quoted species	-	-	-	-	-	-
import from third countries	43.360	48.475	66.029	53.989	100	-18
of it from Morocco	27.377	35.093	53.313	43.773	81	-18
India	639	538	483	1.479	3	206
Tunisia b)	2.635	1.883	2.138	1.206	2	-44
USA	8	488	658	410	1	-38
Thailand	98	153	181	75	0	-59
Chile	-	-	-	49	0	-
Vietnam	6	2	114	39	0	-66
Bosnia	-	-	182	35	0	-81
Senegal	16	42	37	34	0	-9
China	28	5	45	33	0	-27
Turkey	30	6	17	32	0	91
Oman	-	-	8	10	0	29

Note: a) Selected countries, which are most important for EU supply with sardines.- b) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 5.7 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for shrimp

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
Shrimp (Pandalidae), frozen	**59.387**	**58.793**	**57.904**	**57.643**	**100**	0
of it from Greenland	51.469	45.567	46.089	43.190	75	-6
Shrimp (Crangon), frozen	**39**	**5**	**11**	**7**	**100**	-39
Rose Shrimp (Parapenaeus), frozen	**11.611**	**12.111**	**12.474**	**11.020**	**100**	-12
of it from Morocco	4.584	3.908	3.185	4.268	39	34
Senegal	3.367	4.829	4.583	2.928	27	-36
Shrimp (Penaeus spp.), frozen	**339.655**	**308.874**	**295.015**	**327.509**	**100**	11
of it from Ecuador	94.923	90.564	94.497	105.605	32	12
India	42.176	46.337	48.039	63.476	19	32
Bangladesh	32.212	33.322	32.660	32.201	51	-1
Shrimp, other species, frozen	**144.717**	**131.985**	**139.515**	**148.774**	**100**	7
of it from Argentina	52.992	53.735	67.239	76.004	51	13
China	31.528	28.082	31.820	25.505	17	-20
Shrimp (Pandalidae), not frozen	**735**	**12**	**10**	**12**	**100**	17
of it from Morocco	101	1	1	0	2	-82
Shrimp (Crangon), fresh or cooked	**22**	**1**	**2**	**-**	-	-
of it from Morocco	21	-	-	-	-	-
Shrimp (Crangon) other than [1]	**11**	**-**	**-**	**-**	-	-
of it from Morocco	**11**	**-**	**-**	**-**	-	-
Shrimp, other species, not frozen	**381**	**289**	**261**	**310**	**100**	19
of it from China	58	74	19	77	25	312
Shrimp, prepared/preserved	**390.061**	**362.789**	**350.556**	**334.298**	**100**	-5
of it from Thailand	74.087	72.752	50.237	20.458	6	-59
Greenland	63.379	59.605	54.397	47.781	14	-12
Canada	62.219	63.422	82.480	72.691	22	-12
Vietnam	38.300	33.196	33.821	49.138	15	45
Morocco	28.541	25.719	26.478	30.987	9	17
Shrimp, smoked	**-**	**468**	**168**	**7**	**100**	-96
of it from China	-	-	-	-	-	-
Supply (Catches + Import)	974.609	884.384	864.809	887.222	100	3
of it catches of EU quoted shrimp [2]	27.990	9.057	8.893	7.642	1	-14
import from third countries	946.619	875.327	855.916	879.580	99	3
of it from Ecuador b)	108.084	104.940	97.610	110.159	13	13
India b)	72.063	74.809	85.397	103.709	12	21
Greenland b)	115.203	105.171	100.486	90.974	10	-9
Canada b)	67.333	70.230	89.968	82.829	9	-8
Vietnam b)	71.627	56.961	59.995	80.707	9	35
Argentina b)	72.580	64.250	69.542	77.313	9	11
Bangladesh b)	47.264	47.353	47.346	44.695	5	-6
China b)	53.005	49.749	50.395	39.069	4	-22
Morocco b)	34.245	30.296	30.959	36.178	4	17
Indonesia b)	33.996	20.397	22.577	31.876	4	41
Thailand b)	112.922	101.871	64.074	31.452	4	-51
Nicaragua b)	10.934	12.959	13.175	17.745	2	35
Honduras b)	12.223	10.683	13.477	16.386	2	22
Iceland b)	25.119	21.433	17.054	15.814	2	-7
USA b)	7.190	7.776	7.037	10.891	1	55
Madagascar b)	9.332	9.170	8.784	8.225	1	-6
Venezuela b)	9.949	10.524	10.299	7.477	1	-27
Senegal b)	5.870	6.466	6.876	5.557	1	-19
Mozambique b)	6.543	2.466	2.639	4.666	1	77
Nigeria b)	4.713	4.288	3.677	4.228	0	15

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 2015

Tab. 5.8 Origin of imports into EU (EU [27] 2011-2012; EU [28] 2013-2014) from third countries for cephalopods

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2011	2012	2013	2014	2014	14/13
SQUID total	**202.827**	**206.739**	**192.434**	**180.603**	**36**	**-6**
of it Loligo, frozen	163.016	166.571	161.068	163.191	100	1
of it L. patagonico	24.245	43.415	42.198	48.043	100	14
of it from Falkland Isles	20.891	39.489	34.102	39.019	81	14
of it L. vulgaris	9.799	6.804	10.854	11.994	100	11
of it from Morocco	4.447	3.751	6.882	8.986	75	31
of it L. pealei	1.332	1.399	1.129	2.108	100	87
of it from USA	1.291	1.374	1.121	2.009	95	79
of it other loligo	127.640	114.954	106.887	101.046	100	-5
of it from India	38.256	36.985	34.514	34.940	35	1
Thailand	24.433	21.262	19.518	21.841	22	12
of it other squid (Pota and Poton) c)	34.598	34.641	26.029	14.397	100	-45
of it from China	14.817	14.319	14.302	7.790	54	-46
of it Squid, fresh	1.087	1.162	1.774	2.185	100	23
of it Squid, prepared	4.126	4.365	3.564	830	100	-77
ILLEX frozen total	**38.732**	**42.204**	**53.616**	**57.439**	**11**	**7**
of It from Argentina	18.821	23.836	39.440	32.281	56	-18
China	12.472	8.035	9.825	17.795	31	81
CUTTLE FISH total	**60.963**	**49.179**	**41.409**	**33.539**	**7**	**-19**
of it sepiola, frozen	59.938	48.020	40.677	32.629	100	-20
of it S. rondeleti	197	368	200	151	0	-24
of it excluding S. rondeleti	6.578	1.773	920	894	3	-3
of it from Morocco	3.704	364	119	120	13	1
of it other species	53.163	45.879	39.557	31.584	100	-20
of it from India	16.899	10.738	5.732	1.530	5	-73
Morocco	11.653	16.403	17.181	15.837	50	-8
Cuttle fish, fresh	770	920	653	794	100	22
Cuttle fish, prepared	255	239	79	116	100	47
OCTOPUS total	**90.806**	**77.006**	**81.233**	**87.103**	**17**	**7**
of it octopus frozen	90.353	76.555	81.096	86.982	100	7
of It from Morocco	20.544	22.828	41.243	30.945	36	-25
Mexico	13.603	6.502	6.225	8.662	10	39
Senegal	8.437	8.465	3.755	4.689	5	25
of it octopus, fresh	269	417	99	86	100	-13
of it octopus, prepared	183	34	38	36	100	-5
OTHER CEPHAL. , frozen d)	**103.704**	**90.821**	**106.984**	**146.534**	**29**	**37**
of It from Peru	44.694	40.886	46.684	65.665	45	41
India	19.126	18.503	27.549	41.818	29	52
Supply (Catches + Import)	497.032	465.950	475.675	505.218	100	6
of it catches of EU quoted cephalopods	-	-	-	-	-	-
import from third countries	497.032	465.950	475.675	505.218	100	6
of it from India b)	83.731	72.645	73.051	84.215	17	15
Peru b)	59.739	65.764	66.519	81.479	16	22
China b)	63.460	55.463	70.232	63.707	13	-9
Morocco b)	43.881	46.909	69.641	60.057	12	-14
Falkland Isles b)	36.743	53.866	43.197	43.880	9	2
Argentina b)	19.078	24.033	39.456	32.282	6	-18
Thailand b)	32.715	29.147	25.771	29.986	6	16
Vietnam b)	26.464	23.651	17.225	19.035	4	11
Mauretania b)	10.838	12.943	14.233	16.571	3	16
Indonesia b)	13.118	11.353	8.351	12.110	2	45
Chile b)	16.662	15.710	7.482	12.056	2	61
USA b)	15.145	13.641	3.271	11.503	2	252
Mexico b)	14.017	7.172	6.433	9.153	2	42
Senegal b)	12.952	11.376	7.503	8.927	2	19
Tunisia b)	12.992	10.084	6.123	6.762	1	10

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 2015

Tab. 6.1 EU-Quota by species

Species	Code-name	EU (25)		EU (27) 2012; EU (28) 2013-2014				
		2010	2011	2012	2013	2014 a)	Change 14/13	Quota '14 by species
		tonnes					%	%
Herring	HER	600.720	639.533	776.656	817.118	793.283	-2,9	20,8
Sprat	SPR	584.427	513.762	441.462	456.583	418.009	-8,4	11,0
Anchovy	ANE	30.600	38.142	28.696	28.331	29.995	5,9	0,8
Atl. Salmon	SAL	1.548	1.328	690	612	597	-2,4	0,0
Cod	COD	158.351	162.310	186.398	197.353	198.463	0,6	5,2
Haddock	HAD	52.239	53.331	67.258	61.393	51.801	-15,6	1,4
Saithe	POK	71.250	61.351	53.451	59.930	55.028	-8,2	1,4
Pollack	POL	16.211	15.887	15.835	15.887	15.856	-0,2	0,4
Norway pout	NOP	76.000	4.500	75.750	167.500	106.250	-36,6	2,8
Blue whiting	WHB	130.014	22.912	80.272	221.923	231.710	4,4	6,1
Greater forkbeard	GFB	2.380	2.560	2.547	2.488	2.525	1,5	0,1
Whiting	WHG	30.275	35.608	41.703	48.436	43.726	-9,7	1,1
Hake b)	HKE	67.934	75.386	76.939	88.474	106.089	19,9	2,8
Jack&horse macke.	JAX	263.717	274.609	267.066	267.379	224.530	-16,0	5,9
Mackerel	MAC	500.551	381.467	391.993	337.833	606.829	79,6	15,9
Europ. Plaice	PLE	81.912	90.016	100.563	115.378	128.549	11,4	3,4
Common sole / Sole	SOL	27.509	29.575	31.942	30.191	26.033	-13,8	0,7
Megrims	LEZ	26.548	26.441	28.000	28.380	30.199	6,4	0,8
Anglerfish nei	ANF	61.348	63.193	63.474	60.556	63.413	4,7	1,7
Penaeus shrimps	PEN	4.108	-	3.317	3.317	3.100	-6,5	0,1
North deep prawn	PRA	23.362	21.924	20.722	16.736	13.327	-20,4	0,3
Norway lobster	NEP	73.884	77.042	76.767	73.789	69.193	-6,2	1,8
Atl. Redfish	RED	36.348	29.444	29.579	25.997	27.759	6,8	0,7
Greenland halibut	GHL	17.601	17.355	16.329	14.147	13.535	-4,3	0,4
Atl. Halibut	HAL	1.075	1.150	1.275	250	250	0,0	0,0
other species	OTH	6.110	5.350	5.350	6.850	8.395	22,6	0,2
Boarfish	BOR	-	-	-	82.000	127.509	-	3,3
Sandeels	SAN	346.920	354.380	58.923	264.124	207.219	-21,5	5,4
Blue ling & ling	B/L	2.700	-	-	-	1.500	-	0,0
Blue ling	BLI	1.799	2.642	3.013	3.506	3.185	-9,2	0,1
Ling	LIN	11.266	12.268	12.530	12.641	13.049	3,2	0,3
Flat fish	FLX	300	-	-	-	300	-	0,0
Capelin	CAP	-	56.364	56.364	5.775	34.650	500,0	0,9
Catfish	CAT	-	-	-	-	-	-	-
Witch flunder	WIT	-	-	-	-	-	-	-
American plaice	PLA	-	-	-	-	-	-	-
Yellow tail flounder	YEL	-	-	-	340	-	-	-
Roundnose grenad.	RNG	9.388	8.313	7.709	9.190	8.875	-3,4	0,2
Industry fish	I/F	800	800	800	800	800	0,0	0,0
Skates (NAFO)	SKA	-	-	5.352	4.408	4.408	0,0	0,1
Turbot / Brill	T/B	4.737	4.642	4.642	4.642	4.728	1,9	0,1
Skates (ICES)	SRX	28.744	27.756	18.297	16.541	13.656	-17,4	0,4
Dab / Flunder	D/F	18.810	18.434	18.434	18.434	18.434	0,0	0,5
Lemon Sole/Witch Flunder	L/W	6.521	6.391	6.391	6.391	6.391	0,0	0,2
Northern blue fin tuna	BFT	7.087	5.748	5.756	7.936	7.937	0,0	0,2
Albacore	ALB	29.832	29.832	28.479	28.479	28.005	-1,7	0,7
Bigeye tuna	BET	31.200	29.867	29.867	29.467	29.467	0,0	0,8
Swordfish	SWO	15.274	14.315	13.737	13.528	13.019	-3,8	0,3
Picked dogfish	DGS	142	5	-	-	-	-	-
Black scabbardfish	BSF	10.192	10.432	9.944	11.108	11.837	6,6	0,3
Greater argentine	ARU	6.489	5.970	6.090	5.639	5.967	5,8	0,2
Tusk (=Cusk)	USK	705	732	734	1.441	1.482	2,8	0,0
Orange roughy	ORY	-	1	-	-	-	-	-
Blackspot(=red)seabream	SBR	2.131	2.318	2.355	2.223	2.088	-6,1	0,1
Deep Sea Sharks	DWS	86	-	-	-	-	-	-
unserted species	VFF	-	-	-	-	-	-	-
Total:		3.481.145	3.235.386	3.173.451	3.675.444	3.812.951	3,7	100,0

Tab. 6.1 EU-Quota by species

Species	Code-name	EU (25)		EU (27) 2012; EU (28) 2013-2014				
		2010	2011	2012	2013	2014 a)	Change 14/13	Quota '14 by species
		tonnes					%	%
of which: (COD, POK, POL, HAD, WHG, HKE, RED)		432.608	433.317	471.163	497.470	498.722	0,3	13,1

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

Source: EU, TAC regulations.-
Published by: AIPCE 2015

Tab. 6.2 EU-Catches by quoted species

Species	Code-name	EU (25)		EU (27) 2012; EU (28) 2013-2014				
		2010	2011	2012	2013	2014 a)	Change 14/13	Quota'14 by spec.
		tonnes					%	% b)
Herring	HER	449.570	536.298	685.359	737.554	742.610	0,7	93,6
Sprat	SPR	474.637	391.850	315.023	327.570	383.582	17,1	91,8
Anchovy	ANE	12.777	23.255	21.803	20.095	27.875	38,7	92,9
Atl. Salmon	SAL	616	569	579	477	465	-2,6	77,8
Cod	COD	138.449	138.629	150.537	137.516	140.109	1,9	70,6
Haddock	HAD	46.711	46.291	57.138	57.696	50.586	-12,3	97,7
Saithe	POK	52.362	53.549	47.986	48.970	41.635	-15,0	75,7
Pollack	POL	5.506	6.113	5.873	6.614	7.301	10,4	46,0
Norway pout	NOP	66.924	3.733	23.181	35.775	26.161	-26,9	24,6
Blue whiting	WHB	82.278	14.528	68.850	117.273	183.356	56,3	79,1
Greater forkbeard	GFB	1.621	1.630	1.538	1.558	1.796	15,3	71,1
Whiting	WHG	28.604	29.231	29.018	31.489	31.206	-0,9	71,4
Hake c)	HKE	55.330	61.106	61.927	71.734	87.816	22,4	82,8
Jack&horse macke.	JAX	189.061	217.713	222.517	217.795	164.647	-24,4	73,3
Mackerel	MAC	404.280	354.521	365.870	333.393	585.499	75,6	96,5
Europ. Plaice	PLE	75.136	77.214	86.337	93.796	86.255	-8,0	67,1
Common sole / Sole	SOL	24.032	21.168	22.733	24.519	23.422	-4,5	90,0
Megrims	LEZ	17.275	15.438	16.899	20.076	17.455	-13,1	57,8
Anglerfish nei	ANF	43.893	41.988	46.075	49.789	51.875	4,2	81,8
Penaeus shrimps	PEN	944	681	715	662	732	10,6	23,6
North deep prawn	PRA	10.747	27.990	9.057	8.893	7.642	-14,1	57,3
Norway lobster	NEP	58.107	37.555	52.921	45.978	49.880	8,5	72,1
Atl. Redfish	RED	25.186	19.856	17.949	20.239	18.949	-6,4	68,3
Greenland halibut	GHL	15.491	9.801	14.452	13.527	12.982	-4,0	95,9
Atl. Halibut	HAL	-	124	2	-	-	-	0,0
other species	OTH	5.226	4.649	5.063	6.039	8.295	37,4	98,8
Boarfish	BOR	-	-	-	69.795	43.404	-	34,0
Sandeels	SAN	331.372	329.715	58.509	249.432	178.406	-28,5	86,1
Blue ling & ling	B/L	1.829	-	-	-	-	-	-
Blue ling	BLI	1.805	2.054	1.892	2.271	1.970	-13,2	61,9
Ling	LIN	9.608	9.492	9.556	9.966	10.346	3,8	79,3
Flat fish	FLX	275	-	-	-	8	-	-
Capelin	CAP	-	11.324	-	-	9.655	-	-
Catfish	CAT	-	198	-	-	-	-	-
Witch flunder	WIT	405	542	492	265	298	12,6	-
American plaice	PLA	817	905	1.024	898	661	-26,4	-
Yellow tail flounder	YEL	1.049	1.230	786	804	313	-61,1	-
Roundnose grenad.	RNG	5.885	5.959	4.865	3.732	4.185	12,1	47,1
Industry fish	I/F	725	689	747	177	777	338,9	97,1
Skates (NAFO)	SKA	-	155	4.118	3.705	4.165	12,4	94,5
Turbot / Brill	T/B	3.918	3.714	4.257	4.292	3.959	-7,8	83,7
Skates (ICES)	SRX	20.889	19.638	14.179	14.398	14.563	1,1	106,6
Dab / Flunder	D/F	10.224	9.248	8.161	6.745	6.029	-10,6	32,7
Lemon Sole/Witch Flunder	L/W	2.515	3.100	2.866	3.114	3.223	3,5	50,4
Northern blue fin tuna	BFT	6.047	5.673	5.682	7.503	5.333	-28,9	67,2
Albacore	ALB	15.122	16.041	18.424	18.736	23.347	24,6	83,4
Bigeye tuna	BET	9.707	19.882	17.307	15.082	16.664	10,5	56,6
Swordfish	SWO	11.168	10.544	11.362	9.770	9.132	-6,5	70,1
Picked dogfish	DGS	263	15	14	11	3	-68,3	-
Black scabbardfish	BSF	7.716	8.030	6.615	6.557	6.656	1,5	56,2
Greater argentine	ARU	2.998	3.062	2.360	2.292	4.844	111,4	81,2
Tusk (=Cusk)	USK	435	464	371	544	430	-21,0	29,0
Orange roughy	ORY	-	1	-	-	-	-	-
Blackspot(=red)seabream	SBR	1.146	888	1.009	1.016	1.151	13,3	55,1
Deep Sea Sharks	DWS	165	56	12	5	3	-38,6	-
unserted species	VFF	-	143	-	-	-	-	-
Total:		2.730.846	2.598.242	2.504.010	2.860.137	3.101.656	8,4	81,3

Tab. 6.2 EU-Catches by quoted species

		EU (25)		EU (27) 2012; EU (28) 2013-2014				
Species	**Code-name**	**2010**	**2011**	**2012**	**2013**	**2014 a)**	**Change 14/13**	**Quota'14 by spec.**
		tonnes					**%**	**% b)**
of which: (COD, POK, POL, HAD, WHG, HKE, RED)		352.148	354.775	370.428	374.258	377.601	0,9	75,7

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

Source: EU catch report
Published by: AIPCE 2015

Tab. 6.3 Overview of selected fish quotas in the world

Species	2010	2011	2012	2013	2014	2015
	1.000 tonnes					
Atlantic cod						
Barents Sea / Norway / Russia	607	703	751	1.000	1.014	915
Norway Coast	21	21	21	21		
Iceland	150	160	177	196	215	218
EU (27)	158	162	186	197	198	168
Pacific cod						
USA	228	293	326	321	319	324
Asia	135	125 b)	125 b)	125 b)	150 b)	150 b)
Haddock						
Barents Sea	243	303	318	200	179	223
Iceland	63	50	45	36	38	30
EU (27)	52	53	67	61	52	55
Saithe						
Barents Sea	204	173	164	140	119	122
Iceland	50	50	52	50	57	58
Faroes	44	29 b)	<40 c)	<30 c)	<29 c)	<22 c)
EU (27)	71	61	53	59	54	47
Alaska pollock						
Russia	1.652	1.620 b)	1.620 b)	1.600 b)	1.630 b)	1.720 b)
USA	915	1.367	1.336	1.387	1.462	1.528
European hake						
EU (27)	68	75	77	88	106	105
Pacific hake						
USA/Canada	262	393	255	365	428	440

Note: a) Adjusted for Barents Sea share.- b) Estimate.- c) Advised limit.-
Source: EU, ICES, NMFS, NCMC, PFMC.-
Published by: AIPCE 2015

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 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 2015

Tab. 7.2 Import of frozen fillets and meat of Alaska-pollock and hake from third countries into EU (28)

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	2,27	2,26	2,23	2,21	2,19	2,13	2,12	2,05
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	1,54	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	1,93
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	1,42	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	1,80	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	-	-	-	-	1,81	-	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	3,39	3,49	3,28	3,27	3,25	3,19	3,16	3,02
from it: Germany	2,39	2,54	2,53	2,52	2,75	2,52	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	4,25	3,75	3,52	3,64	3,53	3,84	3,64	2,47
Spain	3,05	3,24	3,21	3,31	3,20	3,30	3,17	3,15	3,12	3,08	3,09	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	3,56
Meat d), frozen: Total import	1,93	2,04	1,78	2,03	2,24	2,13	2,21	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	1,30	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 2015

Tab. 7.3 Import of frozen fillets and meat of Alaska-pollock and hake from third countries into EU (28)

Average import price (€/KG; without duty) in 2014

Month	1	2	3	4	5	6	7	8	9	10	11	12
Alaska-Pollock												
Fillets a), frozen: Total import	2,14	2,15	2,09	2,08	2,15	2,12	2,14	2,08	2,15	2,17	2,16	2,19
from it: Germany	2,16	2,18	2,13	2,05	2,09	2,09	2,09	2,10	2,13	2,13	2,19	2,21
France	2,26	2,24	2,18	2,11	2,24	2,15	2,26	2,19	2,24	2,37	2,35	2,37
UK	2,27	2,23	2,31	2,25	2,21	2,25	2,25	2,10	2,25	2,22	2,33	2,51
NL	2,30	2,36	2,39	2,38	2,24	2,22	2,28	2,25	2,40	2,43	2,42	2,48
Spain	1,89	1,78	1,88	1,73	1,53	1,67	1,78	1,80	1,80	1,91	1,97	1,91
Denmark	2,17	2,70	2,66	2,46	2,54	2,52	2,55	2,43	2,61	2,58	2,88	2,78
Belgium	1,98	1,93	1,94	2,12	1,91	2,11	2,04	2,34	2,17	2,26	2,08	2,31
Sweden	2,39	2,32	2,93	2,31	2,44	2,15	2,72	2,92	2,22	2,54	2,61	2,51
Poland	1,67	1,73	1,59	1,82	1,99	1,95	1,89	1,80	1,79	1,80	1,60	1,65
Meat b), frozen: Total import	1,26	1,16	1,17	1,15	1,22	1,23	1,49	1,24	1,25	1,28	1,23	1,26
from it: Germany	1,21	1,02	1,08	1,14	1,17	1,18	1,46	1,18	1,20	1,24	1,10	1,15
France	1,27	1,27	1,28	1,20	1,20	1,20	1,22	1,23	1,27	1,29	1,35	1,35
UK	1,44	1,33	1,26	1,27	1,28	1,30	2,17	1,30	1,30	1,33	1,00	1,39
NL	1,41	1,44	1,26	1,16	1,57	1,53	1,09	1,36	1,50	1,37	1,56	1,40
Spain	1,35	1,65	-	-	-	-	2,19	-	-	1,81	-	-
Denmark	0,80	0,81	0,81	0,80	-	0,95	1,04	0,90	1,00	-	1,28	-
Poland	1,25	1,25	1,25	1,24	1,23	1,25	1,25	1,22	1,24	1,25	1,27	1,31
Hake												
Fillets c), frozen: Total import	3,30	3,23	3,13	3,17	3,23	3,08	3,36	3,30	4,11	3,37	3,29	3,27
from it: Germany	2,32	2,39	2,04	2,27	2,20	2,12	2,17	2,49	12,27	2,32	2,37	2,44
France	3,70	3,93	3,90	3,82	3,68	3,24	3,37	3,53	3,82	4,06	3,89	3,74
UK	3,39	4,42	3,32	2,48	2,87	3,25	4,24	2,83	3,34	3,41	2,77	3,13
NL	3,41	3,61	3,61	3,73	3,33	3,80	4,00	3,90	3,87	3,89	3,97	3,97
Spain	3,31	3,25	3,24	3,22	3,35	3,08	3,24	3,20	3,21	3,20	3,19	3,29
Poland	1,82	2,43	2,03	2,41	2,36	2,40	2,61	2,27	2,40	2,45	2,37	2,45
Italy	3,75	3,35	3,68	3,55	3,54	3,18	4,58	3,79	3,13	4,17	3,95	3,66
Meat d), frozen: Total import	1,75	1,99	1,82	2,08	1,79	2,35	1,78	1,94	2,14	2,17	2,02	1,84
from it: Germany	1,37	1,23	1,41	1,48	2,11	2,11	1,39	1,22	1,97	1,57	1,57	1,30
France	2,55	-	-	-	-	-	-	-	-	-	-	-
UK	-	-	-	-	-	-	-	-	-	-	-	-
NL	-	-	-	-	-	-	-	-	-	-	-	3,06
Spain	2,08	2,16	1,96	2,19	1,90	2,46	2,03	2,20	2,28	2,30	2,14	2,04
Poland	1,13	1,22	1,21	-	1,17	-	1,16	1,14	-	1,02	-	1,24
Italy	1,35	1,44	-	1,30	1,20	2,27	-	1,97	-	-	2,44	-

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 2015