# FINFISH STUDY 2021

AIPCE-CEP

**EU Fish Processors and Traders Association**

**Brussels November 2021**

# Finfish Study 2021

## The importance of international trade for seafood security in the EU


This study has been conducted to demonstrate the need for supply of 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 for maintaining and allowing expansion of employment and trade opportunities generated by the fish and seafood processing industry in Europe.

AIPCE-CEP

Brussels, November 2021

Turenhout, M.N.J., Keller M., Schimke A.,Rilatt S., Melgaard Jensen P., Short M., Sipic K., 2021. *Finfish Study 2021*. AIPCE-CEP report, Brussels

Summary

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This report is publicly available via the AIPCE-CEP website on https://www.aipce-cep.org/aipce-cep/white-fin-fish-study/

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# Foreword

The Finfish Study has been prepared by and for the seafood processing and trade industry in Europe for more than 29 years and has been a useful tool in explaining the activities of the fish and seafood processing industry and trading sector.

AIPCE-CEP acknowledges 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 AIPCE-CEP still values the preparation and publication of this annual study that shares AIPCE-CEP's opinion on how the trade is developing. It clarifies AIPCE-CEP's perception of key issues affecting that trade and the importance of finding pragmatic and viable solutions to sustain these activities.

Needless to state that the year 2020 has been an exceptional year. In early spring the global Covid 19 outbreak led the world into an unprecedented series of events. Primary production slowed down. Processing plants had to reduce capacity. Logistics were disrupted. Some markets were lost overnight, others grew. Consumers patterns changed. And, most important, the world was confronted human tragedies.

Taking into account all these disruptions, the seafood market in Europe performed relatively well.

Due to Covid measures in most countries the HoReCa and catering market came near to closure in the first half of the year. This had a severe impact on the fresh market, and that in turn led to less supply from primary producers due to lack of demand. But as the out of home consumption fell sharply, consumers adjusted their patterns. Seafood sales through the retail channel grew as consumers recognized seafood as a healthy and tasty alternative for home cooking.

Once Covid measures were eased mid 2020 troubled markets recovered with consumers once again ready for the out of home consumption. The unfortunate persistence of the virus and the reintroduction of certain measures caused another setback towards the end of the year.

Overall, the sector in Europe demonstrated it was able to provide consumers seafood in challenging circumstances. One of the reasons for that can be related to the broad variety of sources that provide supplies to the value chain. Seafood is known to be one of the most traded foodstuffs. Despite the fact that Covid 19 created logistic challenges, overall market provision was secured through differentiated and robust international supply chains.

The year 2020 will without doubt be remembered as an extraordinary year for many companies. Budget forcasts were shattered and forward planning was dominated by the need to adjust to new developments.

This situation did not end at the break of the year, and 2021 again proved to be a continuation of Covid related disruptions. Most relevant are those in the area of container shipping, fuel costs and lack of labour. But with ever more European consumers that look for healthy and tasty food from natural resources the seafood sector has a positive outlook.

Guus Pastoor

AIPCE President

Peter Bamberger

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# 1 Introduction

## 1.1 Aim 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. Where traditional species dominate consumption in most member states a considerable expansion of species mix and presentation forms has been seen in recent years as logistics and access to materials have improved. Consumers are more aware of the broad spectrum of species and presentation forms available globally as the access to information and travel experiences expand.

As in other sectors imports have been the lifeblood of the industry for many years and fulfil an essential role. Reliance only on domestic supply would leave a much smaller industry and limit the scope for both growth and innovation. Using all the varieties and complementing domestic and imported supply has allowed the sector to maintain and increase its relevance across all member states.

This finfish study - prepared by AIPCE-CEP and its members –exemplifies the need for imported seafood in production of added value seafood within Europe. The ability to rely on 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 data in the finfish study only focuses on the volume aspect of trade and not value. This is because AIPCE-CEP's interest is in the scale of EU activity in relation to the availability of resources both within the EU and beyond. AIPCE-CEP recognises that price and relative values are an important dynamic of the trade but across the 27 EU member states there are many variations in formats, products and specifications that distort the prices making it difficult to make direct comparisons.

Competition for fish and seafood has grown on a global stage. The sector represents one of the largest sectors of all in international food trade and certainly outstrips other proteins. 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.

### Who is AIPCE-CEP

AIPCE (EU Fish Processors and Traders Association) and CEP (European Federation of National Organizations of Importers and Exporters of Fish) were established in 1959 and collaborate on the basis of a cooperation agreement, creating AIPCE-CEP. AIPCE-CEP comprises 19 EU National Associations and 3 associations from third countries. The sectors AIPCE-CEP represent account for more than 3,900 enterprises and 128,000 jobs.


The value of the output of the industry represented amounts to around EUR 30 billion, about three and a half times the turnover of the EU catching sector.

AIPCE-CEP represents the EU fish processors and traders as a common strong voice in Europe providing for a framework in which companies can grow and prosper to continue offering healthy, sustainable and responsibly sourced fish products. AIPCE-CEP works to inform, analyse and monitor the trade in EU fish and seafood providing feedback and pragmatic advice to regulators and other stakeholders. This is not just to ensure compliance with existing regulation but also to create more effective and appropriate future legislation that enhances the reputation of the industry whilst still allowing it to operate.

AIPCE-CEP strives to take an active role in helping shape regulatory matters to best 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 has taken actions within the supply chains ahead of regulatory controls to meet the expectations of stakeholders and consumers. At the same time, AIPCE-CEP is always mindful that this needs to be done whilst achieving and maintaining a consistent, regular and competitive offering.

The world of seafood is extremely dynamic 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 AIPCE-CEP to play its role in managing resources and their proper use has been at the forefront of its activities and AIPCE-CEP is acutely aware of the many considerations that comes with this for others and our members. AIPCE-CEP is confident that the efforts going into precautionary management, resource allocation and sustainability are paying off in many parts of the world.

## 1.2 Used data

The report is mainly based on statistics taken from Eurostat 2020 data and refers to the EU member states who were member states at the beginning of the year. For 2020 data only statistics from EU27 (EU28 excluding United Kingdom) were used. United Kingdom left the European Union on the 31st of January 2020. Any other data is ascribed to source.

Eurostat provides information by fishery product, species and/or category. To ensure consistency and to make a common comparison all information in the study have been converted to Whole Fish Equivalent (WFE).

Prior to 2009 the study used the official conversion factors of the German government as the basis of these calculations. Using such official data enables consistency but in AIPCE-CEP's opinion poorly recognised some increasingly significant differences in regional processing and product formats that in some instances have become key influencers in the EU and indeed global markets.

AIPCE-CEP methodology adopts our own set of conversion factors based on expressed processing yields gleaned from the practical experience of AIPCE-CEP members. AIPCE-CEP believes this approach more accurately reflects the differences between major processing methodologies now being employed as a result of both technical innovation as well as regional shifts around the world. Importantly this allows us to assess more realistically how much of the global resources are used in the EU market.

The EU Market Observatory (EUMOFA) regularly publishes trade data and has itself established conversion factors for all CN code through its own research. In the majority of cases these are the same or very closely match those used by AIPCE-CEP and has helped improve the accuracy of official reporting.

There will always be gaps and anomalies in the official statistics when they are first published and there is a long established process to correcting these retrospectively. Consequently, historical numbers are adjusted in the Finfish study as later versions become available but these changes are normally minor.

# 2 Consumption and supply

## 2.1 Key findings

- Total market supply (EU-production + third countries imports) for EU accounted to 13,019 million tonnes in 2020
- EU domestic supply for consumption reached 4,072 million tonnes in 2020
- 8.947 thousand tonnes of seafood for consumption was imported from third countries in 2020
- Exports to third countries accounted to 2,517 million tonnes in 2020.
- Total EU consumption (EU domestic supply + Imports – Exports) in 2020 was 10,520 million tonnes
- The per capita consumption in 2020 was 23.5 kg
- EU import dependence rate increased following the UK departure to almost 69% of total supply

## 2.2 Food balance

The EU market is highly dependent on imported materials for its markets. EU domestic supply cannot fulfil the EU consumer demands on its own, either in volume or species diversity. Table 2.1 shows the EU food balance for fish and fishery products.

### 2.2.1 EU domestic supply

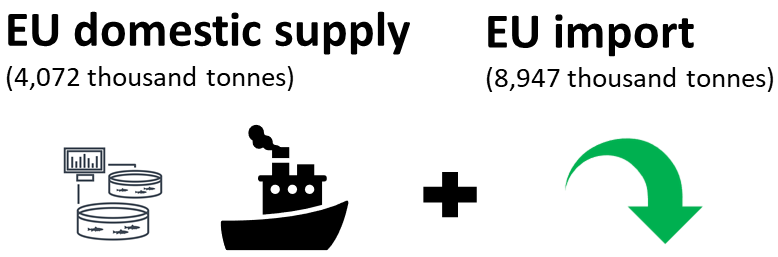
EU domestic supply consists of EU catches and EU aquaculture production. In 2020 79% of this supply came from EU catches (4,302 million tonnes) whereas aquaculture production reached 1,120 million tonnes. Part of EU catches are intended for non-food uses (fishmeal, fish oil; 1,250 thousand tonnes), which make the total EU domestic supply for food uses 4,072 million tonnes in 2020.

### 2.2.2 Imports from third countries

Imports from third country are essential to increase the available fish volumes and fish diversity in the EU. Import activity is high and at 8.947 thousand tonnes is over twice as high as EU domestic supply in 2020.

### 2.2.3 Total supply

Total supply for consumption in the EU is based on the available fish products (food use) gathered from domestic supply and imports from third countries together. The total supply reached 13,019 million tonnes in 2020.

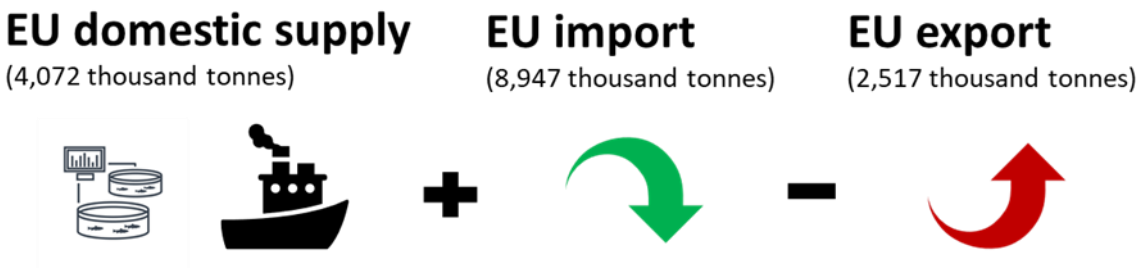



### 2.2.4 Export to third countries

Export activity has risen to 2,517 million tonnes in 2020. Especially the exit of UK out of the EU caused an increase in export volume. Exports represent around 62% of the total EU domestic supply (food use).

### 2.2.5 Total consumption

The net result of domestic supply, import and export gives a calculated consumption of total 10,502 million tonnes in 2020. This number is much lower compared to previous years, because of the absence of UK consumption.




The success of the industry remains dependent on access to imported fish. Domestic supply alone cannot fulfil the full consumption demand, especially in recent years were EU production decreased. It is important to have trade flows as seamless and smooth as possible due to the reliance of the EU processing industry on a truly global sourcing base.

### 2.2.6 Total consumption per capita

When taken at per capita level the total available supply is 29,1 kg and is comparable with the EU28 supply per capita. After adjustment for the export activity – that increased due to Brexit - the consumption per capita decreased to 23.5 kg.

### 2.2.7 Self-sufficiency

The purpose of the finfish study is to highlight the scale of the industry and its dependence on imports. As mentioned above in 2020 total EU supply was 13.019 million tonnes for food use products. The potential net consumption for the EU in this year was 10,502 million tonnes. Projecting this in terms of reliance and self-sufficiency results in the following:

- If all EU catches and aquaculture fish were retained in the EU, it could represent 40.9% of total available supply. However, this includes non-food use so is unrealistic as a measure;
- Adjusting for this then in food use terms EU domestic supply represent 31.3% of total available supply;
- Restating above figures the other way around means that import represent 68.7% of all available supply and 85.2% of consumption [1].

Since the formation of EU25/27 in 2006, the dependence that the EU has on imported materials for its markets has been extremely high within the range of 63% +/- 1%. For 2020, the dependence on imported seafood grew to 68.7% mainly due to further reduced EU catches and the exit of UK out of the EU.


Note: when taking a purely theoretical approach the most optimistic calculation for self-sufficiency in the EU could assume the exports are retained and displace the equivalent amount of imports one-to-one (so 2.517 million tonnes) then the level of self-sufficiency gets to 38.8% against the consumption of 10.502 million tonnes in 2020.

[1] Assuming only domestically caught fish makes up the export activity

**Tab. 2.1 Food balance for fish and fishery products**

1,000 tonnes live weight

| | EU (28) | | | | | | | EU (27) | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2019 a) | 2020 b) | 2021 c) |
| Catches | 4.829 | 5.494 | 5.260 | 5.127 | 5.425 | 5.337 | 4.922 | 4.302 | 4.204 | 4.288 |
| + Aquaculture production d) | 1.185 | 1.236 | 1.268 | 1.296 | 1.370 | 1.319 | 1.322 | 1.120 | 1.118 | 1.174 |
| - Non-food uses | 804 | 960 | 1.056 | 858 | 1.227 | 1.347 | 1.331 | 1.250 | 1.250 | 1.250 |
| = Supply for consumption | 5.210 | 5.770 | 5.472 | 5.565 | 5.568 | 5.309 | 4.913 | 4.172 | 4.072 | 4.212 |
| + Imports (Third countries) e) | 8.927 | 9.124 | 8.990 | 9.246 | 9.306 | 9.439 | 9.469 | 9.062 | 8.947 | 9.126 |
| = Total supply | 14.137 | 14.894 | 14.462 | 14.811 | 14.874 | 14.748 | 14.382 | 13.234 | 13.019 | 13.338 |
| - Exports (Third countries) e) | 2.002 | 2.293 | 2.012 | 1.977 | 2.121 | 2.233 | 2.233 | 2.514 | 2.517 | 2.391 |
| = Total consumption | 12.135 | 12.601 | 12.450 | 12.834 | 12.753 | 12.515 | 12.149 | 10.720 | 10.502 | 10.947 |
| Total supply per capita (kg) f) | 28 | 29 | 28 | 29 | 29 | 29 | 28 | 30 | 29 | 30 |
| by catches for consumption in % | 37 | 39 | 38 | 38 | 37 | 36 | 34 | 32 | 31 | 32 |
| by third countries imports in % | 63 | 61 | 62 | 62 | 63 | 64 | 66 | 68 | 69 | 68 |
| Consumption per capita (kg) g) | 24,0 | 24,9 | 24,5 | 25,2 | 24,9 | 24,4 | 23,7 | 24,0 | 23,5 | 24,5 |
| Self-sufficiency (%) h) | 43 | 46 | 44 | 43 | 44 | 42 | 40 | 39 | 39 | 38 |

Notes: a) Recalculation: EU (28) minus UK; b) Preliminary figures; c) Forecast; d) Estimation for 2019-2021;
e) Without fishmeal (feed) and fishoil, product weight converted into live weight;
f) Total supply / EU-population * 1000 = kg/caput/year; g) Supply for consumption / EU-population; h) Supply for consumption / Total supply * 100 = Self-sufficiency rate in %

Source: Eurostat, Eurostat-Comext, EU catch report, EUMOFA, AIPCE-CEP-Estimations
Published by: AIPCE 2021

### 2.2.8 Current trends

As AIPCE-CEP we keep observing a high diversity in species, frequency and time as innovation in packaging, logistics and therefore access creates more opportunities for consumers to eat more fish often and in alternative ways.

The exit of UK out of the EU will put pressure on the EU domestic supply. Therefor it is not expected that domestic supply will grow on short term, so importing will remain very important to fulfil EU demand. However, competition for fish worldwide will grow.

The corona pandemic did change the trade flows and consumption patterns worldwide. The (partially) lockdown of countries negatively influenced seafood production and consumption. In Europe seafood was mainly accessible via retail, where HoReCa was closed.

Reduced air traffic and worldwide disruption to container traffic continues to cause logistic challenges for getting seafood from point a to point b. Cargo prices have increased significantly and are still at high levels. It has become more challenging for the EU processing industry to fulfil the EU consumer demand for fish.

To ensure continued access to opportunities industry should not be hampered by unnecessary burdens of tariff and non-tariff barriers.

# 3 Regulatory review

## 3.1 Autonomous Tariff Quotas (ATQs)

One of the key messages from the finfish study is the industries dependence on imports. The Autonomous Tariff Quotas (ATQs) regulation is specifically designed to permit the EU industry access to its raw materials in a way that stimulates growth, employment and investment.

At the end of 2020 the latest cycle of ATQs entered into force (Council Regulation (EU) 2020/1706). The new cycle is triennial and focuses on the years 2021-2023. ATQs had been the subject of extensive negotiations in the last months of 2020 and the final agreement represented an improved product coverage and volume. New species introduced in the new cycle are whole frozen flatfish (7,500 tonnes on 0% import tariff), whole fresh trout (10,000 tonnes on 5% import tariff) and whole, fillets and flaps of chub mackerel (5,000 tonnes on 7.5% tariff).

In July 2021 Council Regulation (EU) 2021/1203 amending to the Council Regulation (EU) 2020/1706 new ATQs due to compensate the loss of tariff reduction of the British overseas countries and territories (OCTs) since they are no longer associated with the EU since the UK left the EU, and the loss of duty-free fishery products for processing from Iceland and Norway since additional protocols for quotas for certain fish and fishery products expired on 30 April 2021. In order to ensure an adequate supply to the EU processing industry, in the amending Council Regulation (EU) 2021/1203 import duties are suspended for Patagonian squid, herring preserved in brine, frozen herrings, frozen fillets and flaps of herrings, fillets of redfish and various species of frozen fish for processing.

The strength of ATQs is that they are not country specific. Third country supply of the products needed by the EU processing industry is not always guaranteed from specific sources (eg. due to changes in quotas), which requires flexibility to source from alternative resources. ATQs allow this switching simply and smoothly without losing the benefit of preferential tariffs.

A part of the flexibility in the ATQ system is lost in the most recent legislation. By removing ATQ suspensions for several species (instead of fixed amounts) the current ATQ legislation is taking away the flexibility of reacting to market changes in the three year period.

## 3.2 Trade agreements

### 3.2.1 TCA Agreement UK

The UK left the European Union on 31 January 2020, after which it became a third country. The EU and UK realized a Trade and Cooperation Agreement (TCA) on 24 December 2020 that has been applied provisionally from 1 January 2021.

*Rules of origin:* Heading Five of part Two of the Agreement covers 'Fishery and aquaculture products'. Trade in these products is tariff and quota free, subject to strictly defined (general and product specific) rules of origin. If seafood products are not "wholly obtained" within the EU or UK import tariffs up to 25% are applied.

The seafood industry has over many years developed highly integrated supply chains with different stages of processing being carried out at scale in different parts of the EU. In many cases, products sold into the UK originate from outside the EU and have already gone through various processing stages in the EU by the time they arrive in the UK either as consumer ready or for further processing into finished products. The not fully obtained character of these products do not qualify them for tariff free access to the UK. The processing of these non-EU seafood products will shift to the relevant third country or UK itself.

*Catch certificates:* Under provisions implementing the original UK Withdrawal Agreement, Council Regulation (EC) No 1005/2008 of 29 September 2008 establishing a Community system to prevent, deter and eliminate illegal, unreported and unregulated fishing (IUU) is wholly transposed into UK legislation as part of retained EU law. This means that trade in both directions is now subject to the full catch and certification requirements which each previously only applied to imports from third countries.

The difficulty is that the above mentioned requirements were originally framed to apply at the EU's common external border in the context of trade flows for final consumption within the Single Market (where linkage back to catching vessels would be relatively straightforward) and not for products intended to be re-exported following, often complex, further processing within the EU itself.

### 3.2.2 EVFTA Vietnam

The EU-Vietnam Free Trade Agreement (EVFTA) entered into force on 1 August 2020. The EVFTA is described as the most ambitious trade agreement the EU has ever concluded with a developing country, eliminating 99% of custom tariffs.

Most of the tariffs for seafood products are eliminated directly in the EU-Vietnam FTA. However, for a significant group of seafood products tariffs will be phased out gradually. If EVFTA seafood tariffs are higher during the gradually phase out compared to the General Scheme of Preference-tariffs (GSP) at that moment, the importer may choose whether to use GSP or EVFTA tariffs.

### 3.2.3 EPA Japan

An Economic Partnership Agreement (EPA) between the EU and Japan entered into force on the 1st of February 2019. Under the Agreement, all fish products have been, or will be liberalised over time.

### 3.2.4 Other trade agreements

Beside the TCA-agreement with UK, EVFTA-agreement with Vietnam and EPA-agreement with Japan more EU trade agreements are being negotiated. However, these negotiations have been concluded less recently and are of variable importance for EU processing industry as fish resources are constantly moving and changing.

Concluding trade agreements will help improving bilateral relations, increase trade and remove unnecessary trade barriers between the EU and partner third countries.

## 3.3 EEA Agreement with Iceland and Norway

The supply of fish and fishery products from the Nordic trading partners is significant and facilitated by comprehensive preferential trade instruments. However, 13 additional tariff quotas expired April 30th 2021 with no new agreement yet in sight. These also include consumer ready products, and the Council Regulation (EU) 2021/1203 (See 3.1) only covers until the end of 2022 and for some species and products for end use within the EU. A mechanism of continuity is needed to guarantee continuous and predictable supplies and to bridge the gap between old and new agreements.

## 3.4 IUU and CATCH

In respect of the IUU regulation the European Commission continue to use their system of "yellow and red cards" to deter and eliminate Illegal, Unregistered and Unregulated fisheries. Processors and traders take seriously their responsibilities to ensure that IUU fish products does not enter the supply chain.

At the beginning of November 2021 three third countries have a "red card". These countries are:

- Cambodia since November 2013;
- St Vincent and the Grenadines since May 2017;
- Comoros since May 2017.

Imports of seafood products into the EU from red carded third countries are not allowed.

The following countries received a "yellow card" since 2019:

- Ecuador in October 2019;
- Panama in December 2019;
- Cameroon in February 2021.

The following countries saw their "yellow card" removed since 2019:

- Kiribati in December 2020, which had been in place since April 2016;
- Taiwan in June 2019, which had been in place since October 2015;
- Thailand in January 2019, which had been in place since April 2015.

In May 2019 the European Commission launched CATCH, an IT system that aims to digitalise the currently paper-based EU catch certification scheme as laid down by the Regulation (EC) No 1005/2008.

In coming years CATCH will be used on a voluntary basis. While being a considerable driver for the reduction of the administrative burden reduction for all actors involved, the use of the system will remain voluntary for third countries even after the adoption of the legal basis.

# 4 Covid-19

The (ongoing) Covid-19 pandemic has impacted the seafood market in many ways. As noted in Section 2.2 above, lockdowns and other restrictions to prevent the spread of the virus in the EU led to widespread closures in the hotel, restaurant and catering (HoReCa) sector, significantly reducing demand for fresh fish and resulting in parts of the fleet suspending catching operations. But this was offset by increased sales through retail and other channels for processed products, notably in fresh, frozen and canned categories, using imported raw materials from wider international supply chains. Some of those supplies were in turn affected by Covid-19 related disruption to ports and container traffic, leading to longer shipping times and elevated transport costs, which were partially mitigated by increased market share.

The net effect of these various factors was that overall consumption levels remained surprisingly stable, but with significant shifts from fresh to processed products with correspondingly differential effects on profitability for those concerned. More broadly, the pandemic reduced overall economic activity, with similar differential effects for those remaining in employment as compared to those unable to continue working, exacerbating inequalities in household incomes, reflected in increased sales of both high price 'premium' and low price 'value' products, according to affordability. The gradual return to growth is already seeing an excess of demand in relation to supply, leading to both inflationary pressures and labour and other shortages until equilibrium is restored. How long this will take remains uncertain. It is similarly unclear if working patterns and other aspects of consumer behaviour will return to pre-pandemic models or if some of those changes will prove more permanent. The pandemic has also served to highlight concerns around resilience in supply chains and the longer-term implications of issues such as climate change on future food security. This presents both challenges and opportunities for the seafood industry, particularly compared to land-based food production systems.

# 5 Product category

## 5.1 General

Since 1992 the Finfish study focussed on the dialogue and explanation of trade in the seven key wild whitefish species (cod, Alaska pollock, hake, haddock, saithe, redfish & hoki). This category will be analysed in the first subcategory of this chapter. However, during time more and more species were introduced in the Finfish study (e.g. plaice, salmon, shrimp, tuna, et cetera). These species are analysed, divided and presented in subsequent subcategories.

EU supply will be based on EU-imports, aquaculture production and fisheries catches, where:

- EU-imports are based on Eurostat/Comext data;
- Aquaculture production data comes from the Federation of European Aquaculture Production (FEAP) and estimations from AIPCE-CEP;
- Fisheries catches consist of catches of EU-quoted fish species (EU Catch Report).

Fish volumes are converted to Whole Fish Equivalents (WFE).

## 5.2 Whitefish

### 5.2.1 General

The total whitefish wild caught production worldwide decreased to around 7.1 million tonnes in 2020, having Alaska Pollock (3.5 million tonnes), Atlantic Cod (1.1 million tonnes) and Hakes (1.1 million tonnes) as most important species. [2]

The apparent demand of whitefish is high with 2.668 million tonnes for wild capture species in 2020. These species represent cod, Alaska pollock, hake, haddock, saithe, redfish & hoki. Increased global competition, and a drop in some of the important whitefish quotas put pressure on the whitefish supply in future.

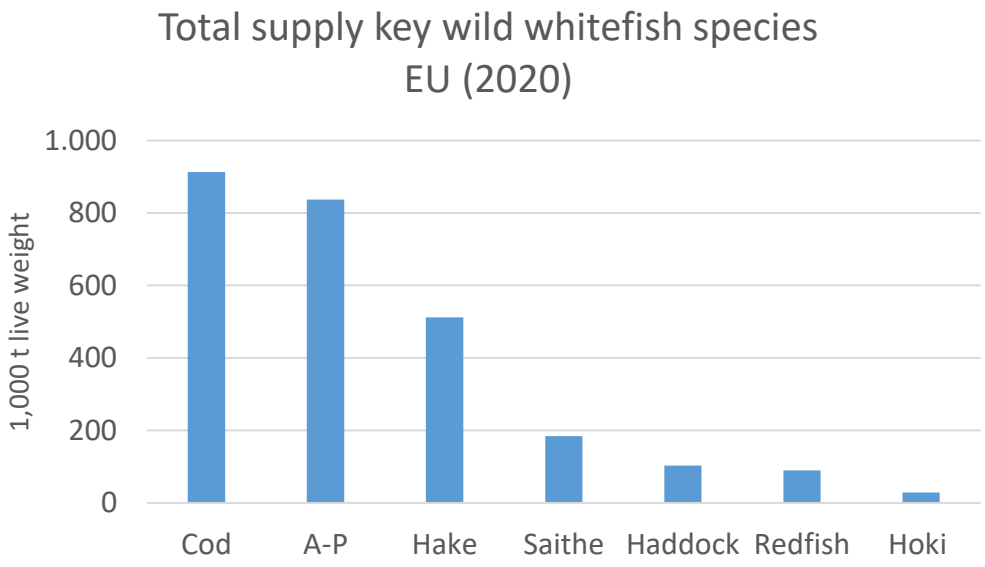



*Figure 5.1: Total volumes utilized in the EU of key wild captured whitefish species in 220; Source: Eurostat/Comext*

Whitefish species are of great importance due to the scale of the tonnages involved and also the high level of processing and value addition associated with the items presented in this trade. Most of the whitefish is imported from outside the EU borders, around 90% in 2020 (2.406 million tonnes). Cod and Alaska Pollock are the most important whitefish species accounting to 913 thousand tonnes and 837 thousand tonnes in 2020 respectively. Species like Alaska pollock and hoki are fully dependent on imports from outside the EU (figure 5.2).

[2] Groundfish Forum 2020

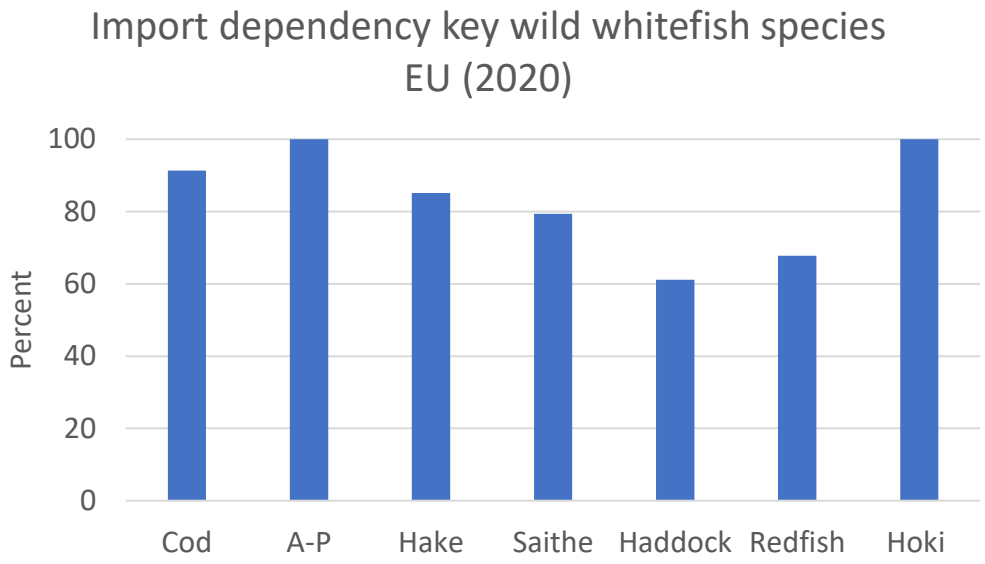



*Figure 5.2: Import dependency EU for key wild captured whitefish species in 2020; Source: Eurostat/Comext*

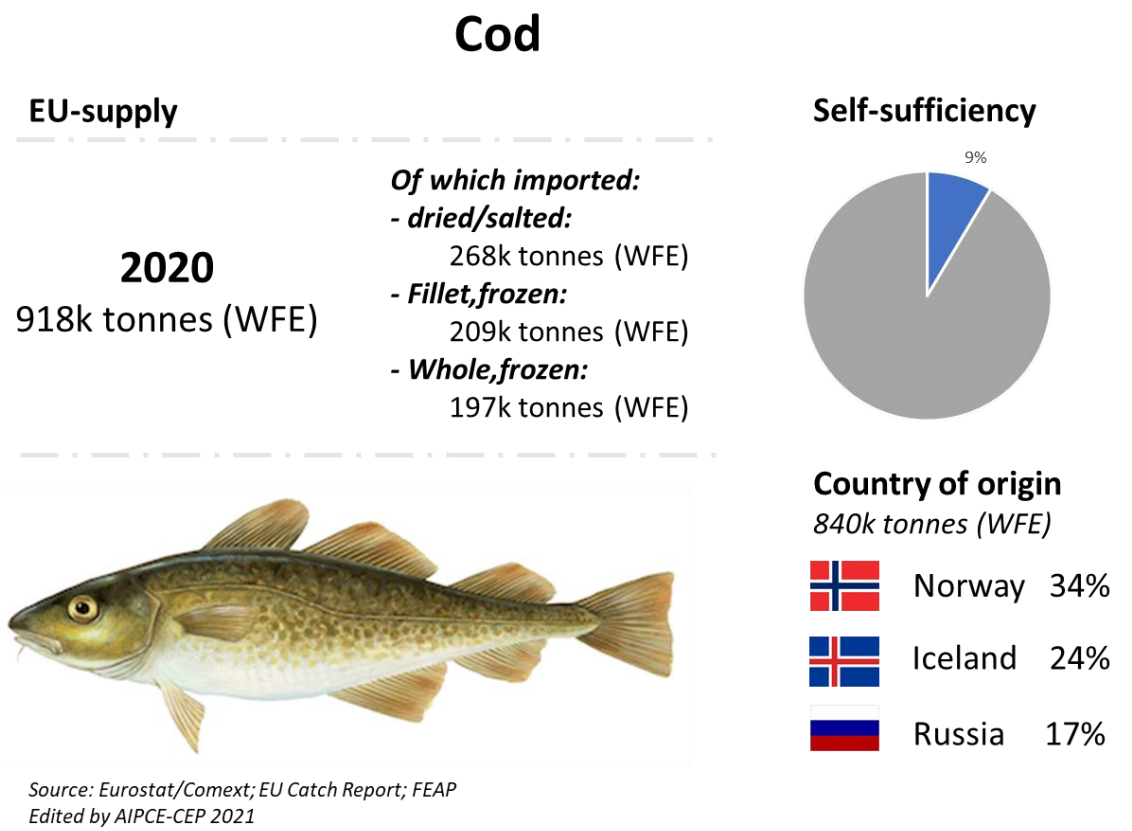
Supply from EU catches of quota species show a decreasing trend for many years. In 2020 the total landings volume of whitefish amounted to 262 thousand tonnes. Especially cod (-23 thousand tonnes), saithe (-8 thousand tonnes) and hake (-8 thousand tonnes) were caught in lower quantities in 2020. The domestic production of all whitefish species decreased, mainly due to the loss of the UK fishing fleet from the EU.

The most important import countries in 2020 were China (446 thousand tonnes), USA (435 thousand tonnes), Norway (393 thousand tonnes), Russia (310 thousand tonnes) and Iceland (274 thousand tonnes). China's share of EU trade has dropped to 18% (in whitefish) at whole fish equivalent. Almost all whitefish import from China and USA are frozen fillets (especially Alaska Pollock).

*"Whitefish species are of great importance due to the scale of the tonnages involved and also the high level of processing and value addition associated with the items presented in this trade"*

Whitefish species are well established in the EU and consumers are familiar with it. Continued access to global whitefish fisheries without unnecessary barriers are essential if processing industry is to be viable and in turn maintaining that viability is key to be able to offer long term opportunity to the EU catching sector.

### 5.2.2 Cod




Europe is the largest single market for all species of cod. Around 70% of the total cod volume is consumed on this continent.

The total EU cod supply in 2020 was 918 million tonnes. Most of the caught Atlantic cod comes from the Barents Sea. Quotas in the Barents sea increased in 2020 (+2% to 738,000 tonnes) and 2021 (+20% to 885,600 tonnes), which is important for the future EU cod supply.

The mid-Atlantic region around Iceland is another important source for Atlantic cod. This area shows an increasing quota for 2020 (to 270,411 tonnes) but a decreasing quota in 2021 (to 254,273 tonnes) due a shortfall of cod. The total share of Icelandic cod was 24% in 2020. It is expected that the share of Icelandic cod will decrease in 2021. 9% of the Atlantic cod supply came from EU fisheries, 79 thousand tonnes in 2020.

Pacific cod are mainly caught by USA/Canada, Russia, Japan and Korea. Pacific cod supply is expected to decline in 2021, where the most of this decline is accounted for by reduced US and Canadian landings.

The most important import countries for cod in 2020 were Norway (34%), Iceland (24%) and Russia (17%). Where the biggest share of cod from Norway consist of salted/dried cod, Icelandic Cod are exported as fresh and frozen fillets/blocks mainly and Russian cod as frozen headed and gutted.

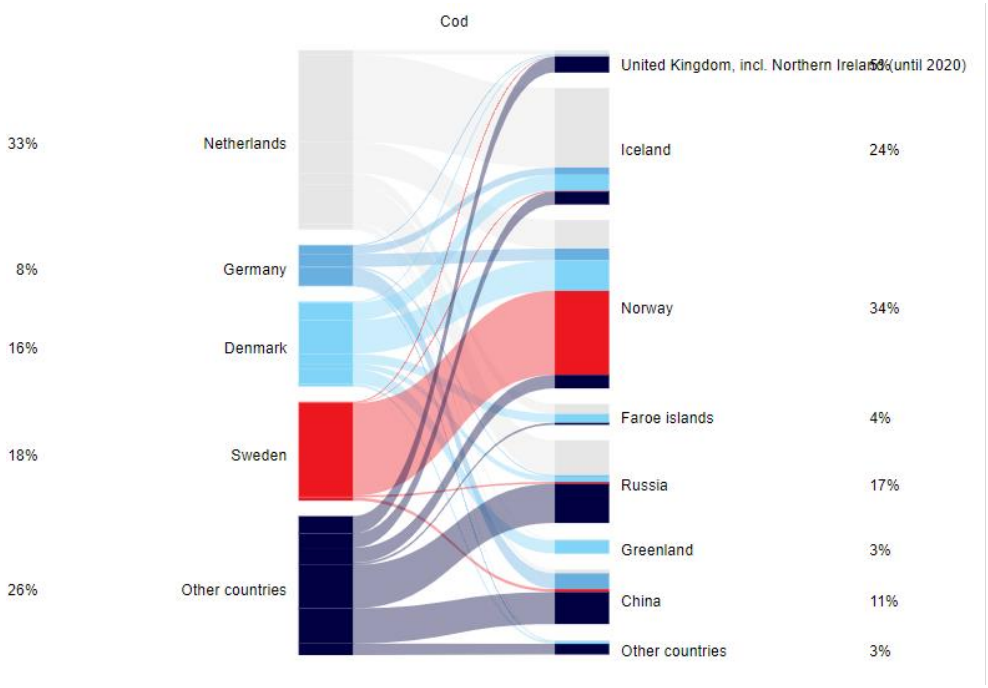


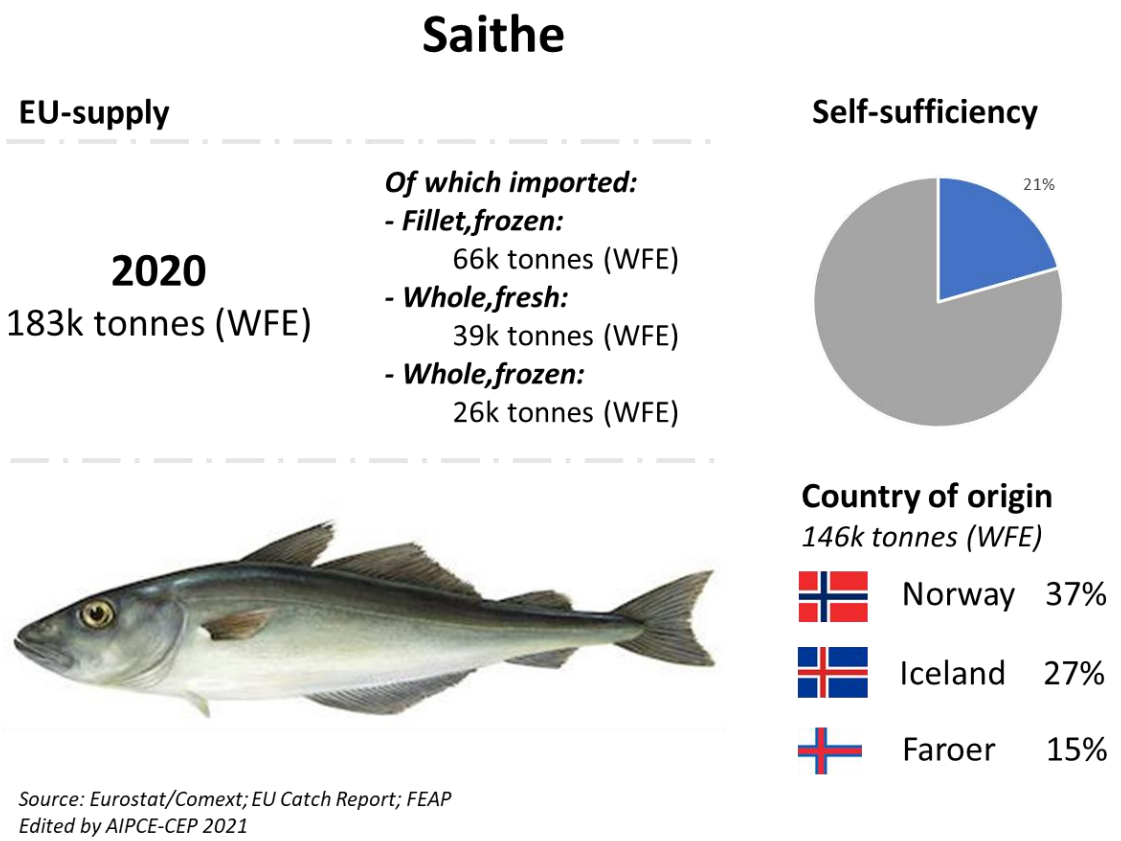

*Figure 5.2.1: EU-27 importers (left) and countries of origin outside the EU-27 (right) for cod. Source: Eurostat, edited by WUR/AIPCE-CEP.*

Cod enters the EU mainly via the border control posts of Netherlands, Denmark and Sweden. Most of the cod imports in 2020 consisted of dried/salted cod (32%), frozen fillets (25%) and frozen whole cod (23%). Cod is re-exported within the EU - either or not processed - to especially France, Portugal and Spain.

Around 135 thousand tonnes of cod was exported to third countries in 2020. A significant amount of frozen whole cod (headed and gutted) were re-exported from especially the harbour of Rotterdam to China. The disrupting logistics and shipping to China due to corona have a negative impact on whole cod re-export via the EU in 2021. Other important third countries the EU exports cod to are the UK, Brazil and Norway.

Industry benefits from two significant Autonomous Tariff Quota (ATQ) allowances in cod. These ATQs are the basis for raw materials in the EU fish processing industry. H&G cod (09.2759) has a limit of 110,000 tonnes and cod fillets (09.2776) have a 50,000 tonnes duty free import allowance in 2020. Another ATQ for cod is salted cod for processing (09.2765) with a 2,000 tonnes duty free import allowance in 2020. All quota are there to stimulate growth, employment and investment in EU fish processing industry.

### 5.2.3 Saithe




Most of the caught saithe comes from the Barents Sea, but also the Atlantic region around EU, Iceland, Faroes and Norway are important areas. That's why both EU catches and imports contributed to the saithe supply in the EU.

2020 showed a saithe supply of around 183 thousand tonnes, where 21% of the supply came from EU fisheries (38 thousand tonnes in 2020). The volumes from EU-fisheries show a decreasing trend. The other 146 thousand tonnes of saithe is imported from third countries (79% of total supply).

Most important countries for saithe in 2020 were Iceland (27%), Norway (37%) and Faroes Islands (15%). 45% of the saithe imports consisted of frozen fillets, followed by fresh whole saithe (both 27%). The products enter the EU via especially the Netherlands, France, Denmark and Sweden. Via these countries products are processed and/or exported to many EU countries like France, Poland, Germany and Denmark.

A small quantity of saithe is exported outside the EU. Around 11 thousand tonnes goes to especially China (re-export), Norway and Brazil.

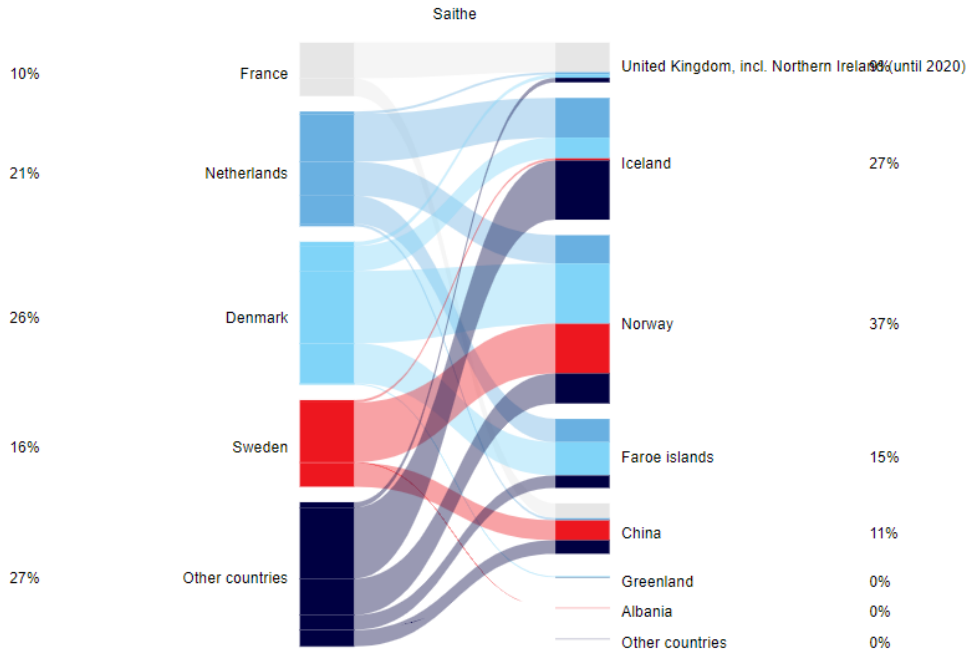
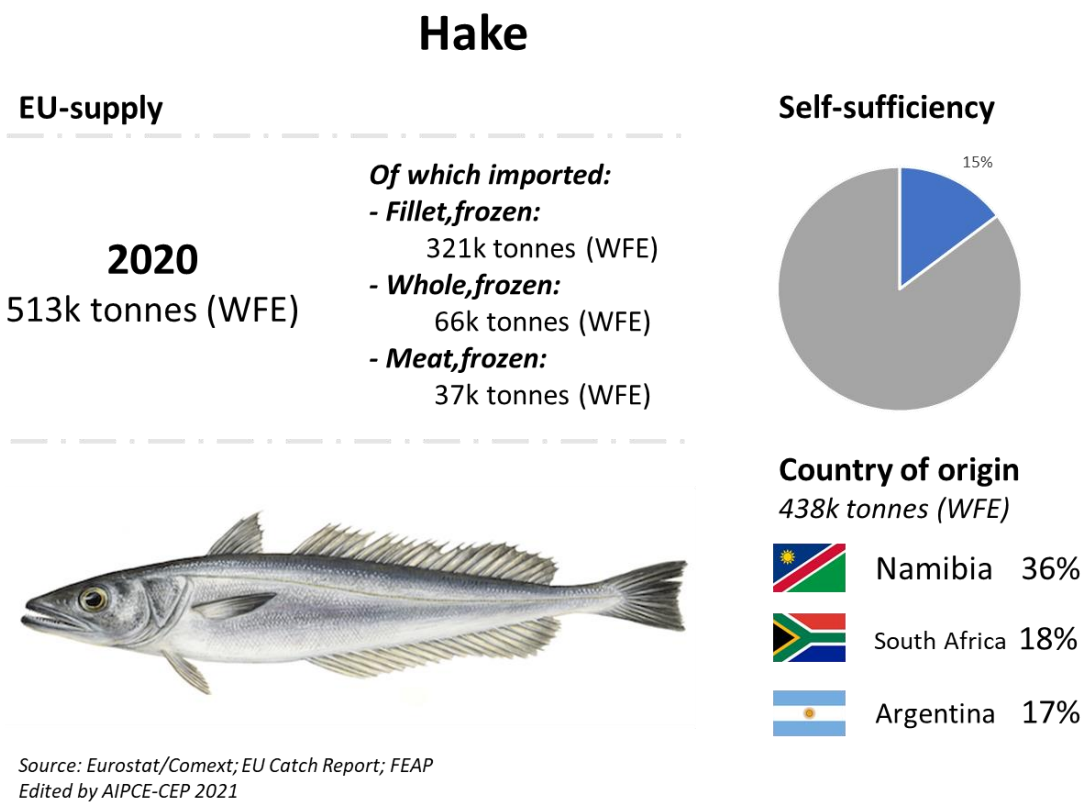



*Figure 5.2.2: EU-27 importers (left) and countries of origin outside the EU-27 (right) for saithe. Source: Eurostat, edited by WUR/AIPCE-CEP.*

There are no ATQ allowances in saithe as the saithe supply come from countries in the EFTA region or the UK.

### 5.2.4 Hake



EU hake supply consisted of 513 thousand tonnes in 2020. 85% of this supply comes from imports from third countries. Namibia (36%), South Africa (18%) and Argentina (17%) are the main countries of origin for the 438 thousand tonnes of imported hake.

EU catches accounted for 76 thousand tonnes in 2020, corresponding with an utilisation of 55% of the EU available quota for hake. As for most of the EU fisheries the corona pandemic played an important role for this low utilisation of EU hake quotum, but also the lower hake production in countries like South Africa, Namibia and Argentina.

Two ATQ allowances are available for hake. Frozen hake for processing (09.2760) has a limit of 10,000 tonnes and frozen fillets and other meat from North Pacific hake and Argentine hake (09.2774) have a 40,000 tonnes duty free import allowance. Both quota are there to stimulate growth, employment and investment in EU fish processing industry. The base limit for frozen hake fillets and other meat (09.2774) was for 75% used at the end of October 2021 (fully used in 2020).

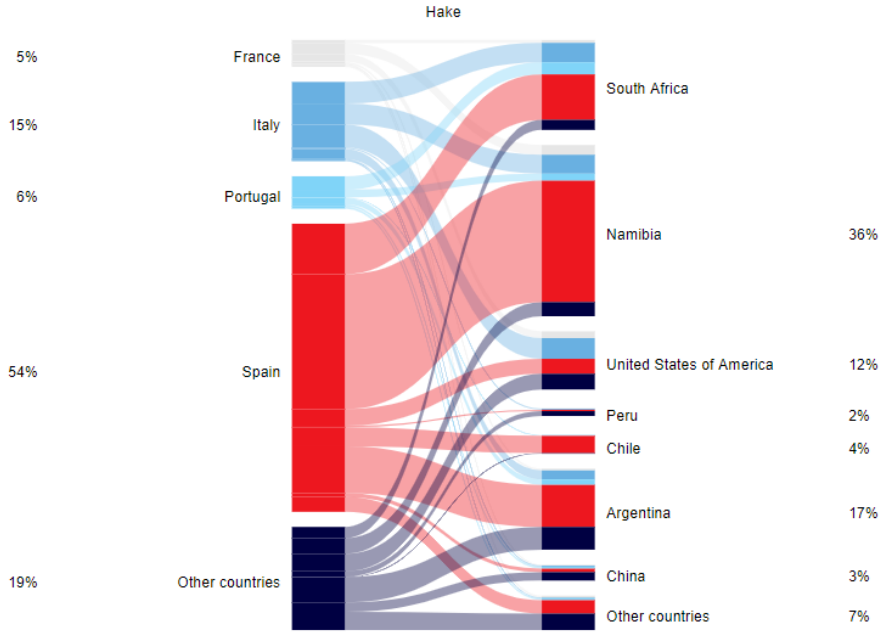
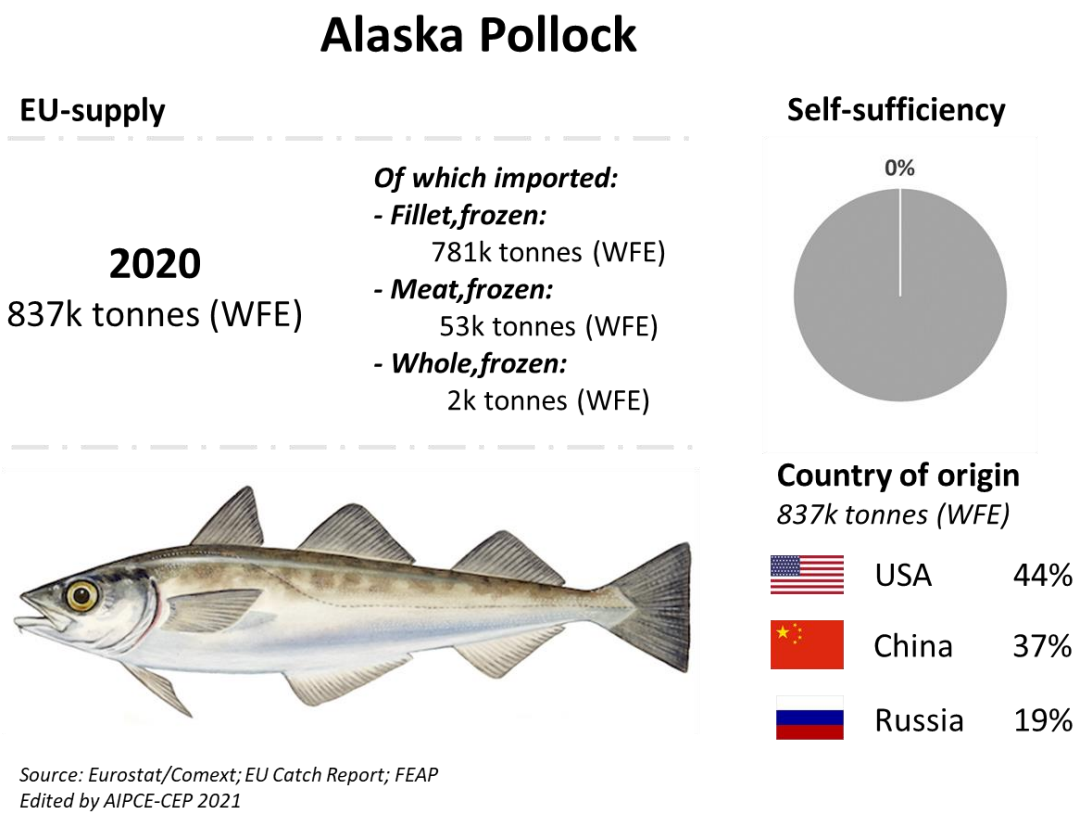



*Figure 5.2.3: EU-27 importers (left) and countries of origin outside the EU-27 (right) for hake. Source: Eurostat, edited by WUR/AIPCE-CEP.*

73% of the 2020 hake imports consisted of frozen fillets, followed by frozen whole hake (15%).

Hake is imported into the EU via Southern European countries mainly, especially via Spain. Spain exports the hake into the EU especially to France, Italy and Portugal. East European non-EU countries (Ukraine, Moldavia, Serbia) are the main importing countries for hake exported from the EU, mainly as whole frozen hake.

### 5.2.5 Alaska Pollock




The total supply of Alaska Pollock is expected to increase slightly to 3.6 million tonnes in 2021. All of this growth will be accounted for by the Russian Federation.

The EU is fully depending on third country imports of Alaska Pollock, self-sufficiency is 0%. The total supply – and thereby third country imports – accounted to 837 thousand tonnes in 2020.

The EU represents a significant and key market for both USA and Russian Alaska pollock. The most important countries for Alaska pollock in 2020 were USA (44%), China (37%) and Russia (19%).

Russian Federation pollock producers increased their focus on EU. Especially MSC certified Alaska pollock finds its way to the EU.

The industry benefits from a significant Autonomous Tariff Quota (ATQ) allowance in Alaska pollock (09.2777), which is the largest single ATQ assignment. The total ATQ quantity is 340,000 tonnes and was 64% used at the end of October 2021 (93% utilisation in 2020).

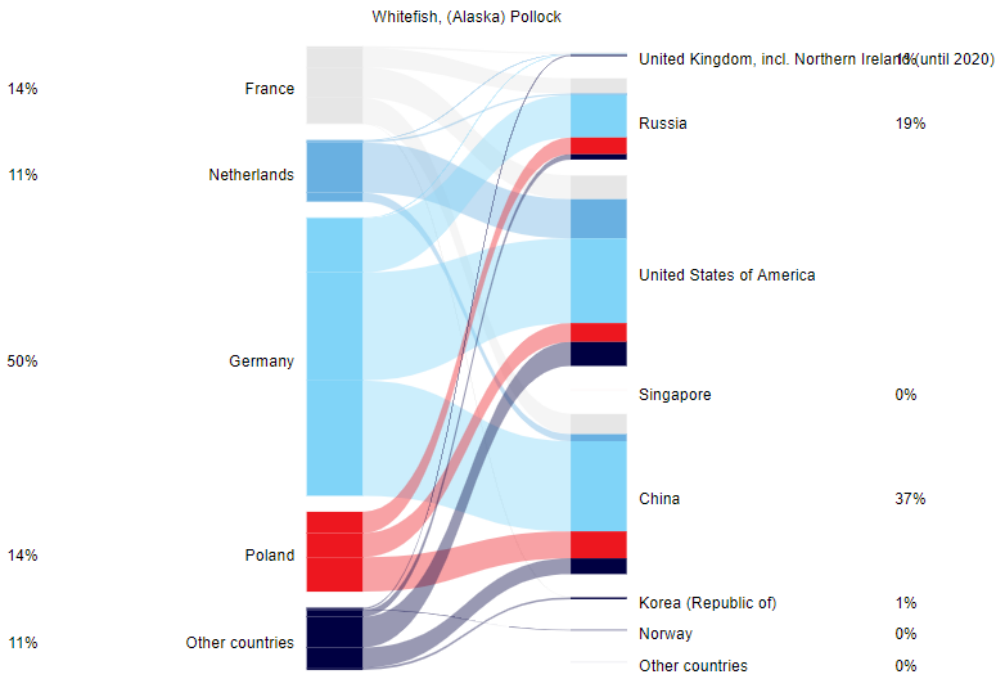


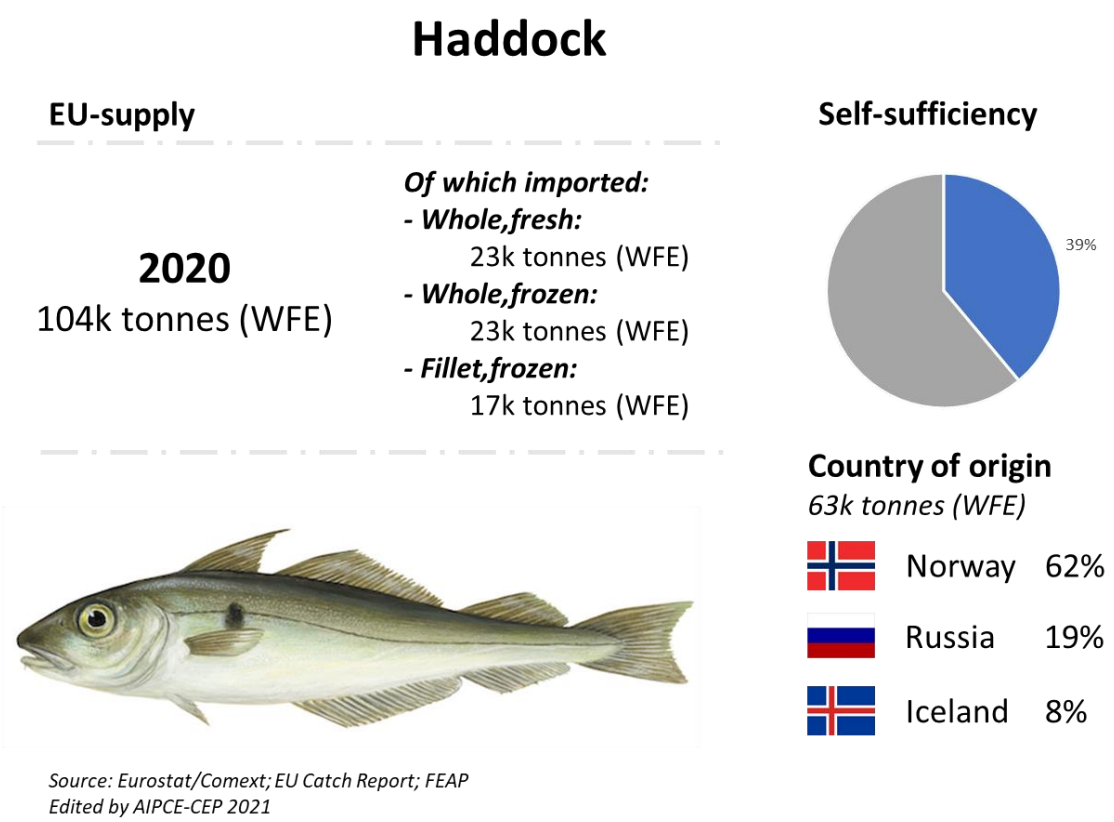

*Figure 5.2.4: EU-27 importers (left) and countries of origin outside the EU-27 (right) for Alaska Pollock. Source: Eurostat, edited by WUR/AIPCE-CEP.*

93% of the Alaska pollock imports in 2020 consisted of frozen fillets, followed by frozen Alaska pollock meat (6%).

Germany is the main importer of Alaska Pollock, followed by Poland, France and the Netherlands. Alaska pollock is an important source for surimi. Import volumes for surimi are not mentioned in this chapter.

Only a small amount of Alaska Pollock is exported outside the EU, around 25 thousand tonnes in 2020. Importing third countries are especially the surrounding European countries like Switzerland, UK and Norway.

### 5.2.6 Haddock




Most of the haddock supply comes from the Barents Sea. In 2020 around 182 thousand tonnes of haddock was landed from the Barents Sea, 15% less than the total allowable catch. Haddock TAC for the Barents Sea increase in 2021 (to 232,537 tonnes) and will decrease in 2021 (to 180,003 tonnes) due to lower stock biomass estimates.

The EU fleet landed 40 thousand tonnes of haddock in 2021, 62% of total available quota. EU self-sufficiency was 39% in 2020.

The most important countries for haddock in 2020 were Norway (62%), Russia (19%) and Iceland (8%).

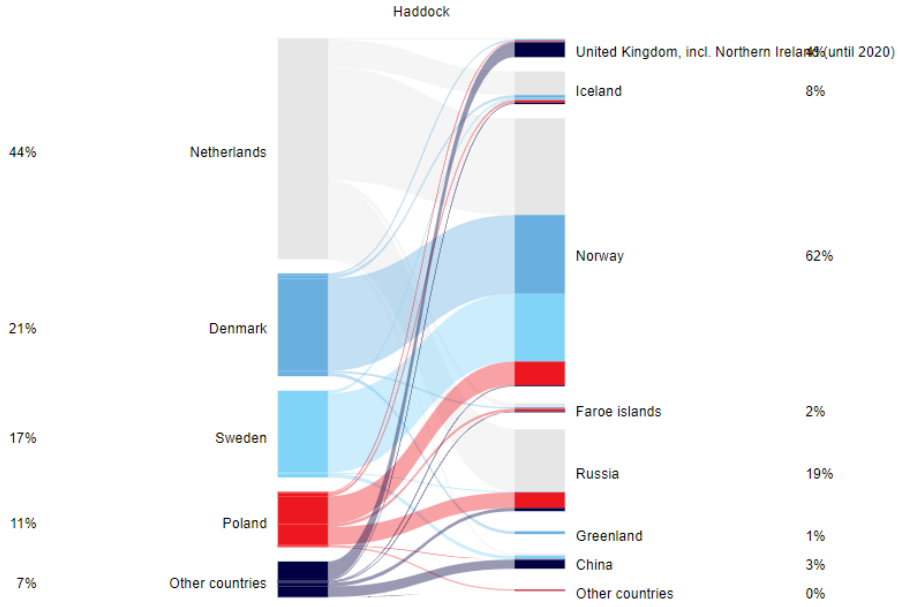



*Figure 5.2.5: EU-27 importers (left) and countries of origin outside the EU-27 (right) for Haddock. Source: Eurostat, edited by WUR/AIPCE-CEP.*

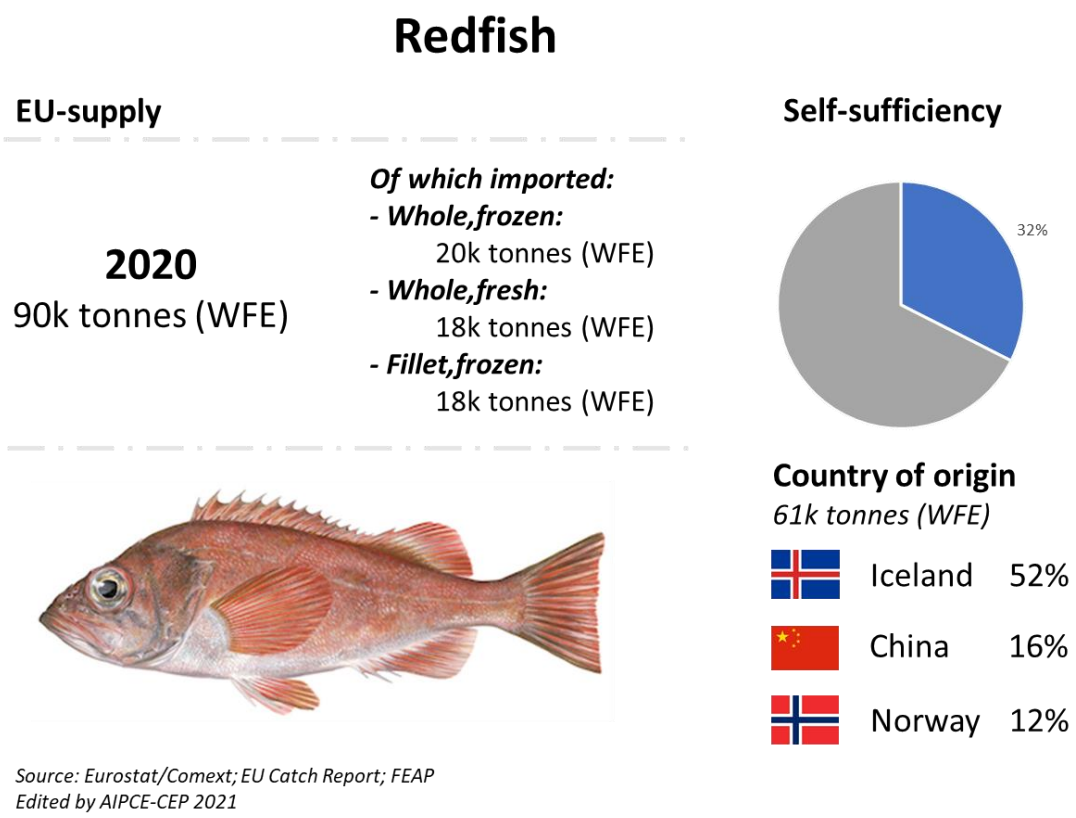
36% of the haddock imports in 2020 consisted of frozen fillets and 36% of frozen whole haddock.

Most of the haddock is imported via a border control post of the Netherlands, Denmark, Sweden or Poland.

Around 42 thousand tonnes of haddock was (re-)exported outside the EU to mainly the UK (62%) and in lesser amount China (36%) in 2020. This corresponds to 41% of total haddock supply in the EU.

There is a modest ATQ for haddock available for EU industry. An ATQ of 3,500 tonnes of H&G haddock (09.2824) was available for a 0% import duty allowance. In 2021 (until the end of October) 43% of this quotum was utilised (93% utilisation in 2020). It is questionable if the amount of 3,500 tonnes is high enough for covering the industry demand when growth is factored in.

### 5.2.7 Redfish




*Source: Eurostat/Comext; EU Catch Report; FEAP*
*Edited by AIPCE-CEP 2021*

In 2020 EU supply of redfish reached around 90 thousand tonnes. Around one third (29 thousand tonnes) of this supply came from the own EU fishing fleet. The other two third of redfish (61 thousand tonnes) was imported, mainly by Iceland (52%), China (16%) and Norway (12%).

Redfish are imported into the EU via the Netherlands, Denmark, Germany and Ireland. Via these countries redfish are processed and/or (re-)exported to other EU-countries, especially Spain, Portugal, France and Germany.

Mainly whole frozen redfish (around 30 thousand tonnes in 2020) from both third country import as own domestic production were exported to third countries like Korea, Cameroon, China Ukraine and Japan.

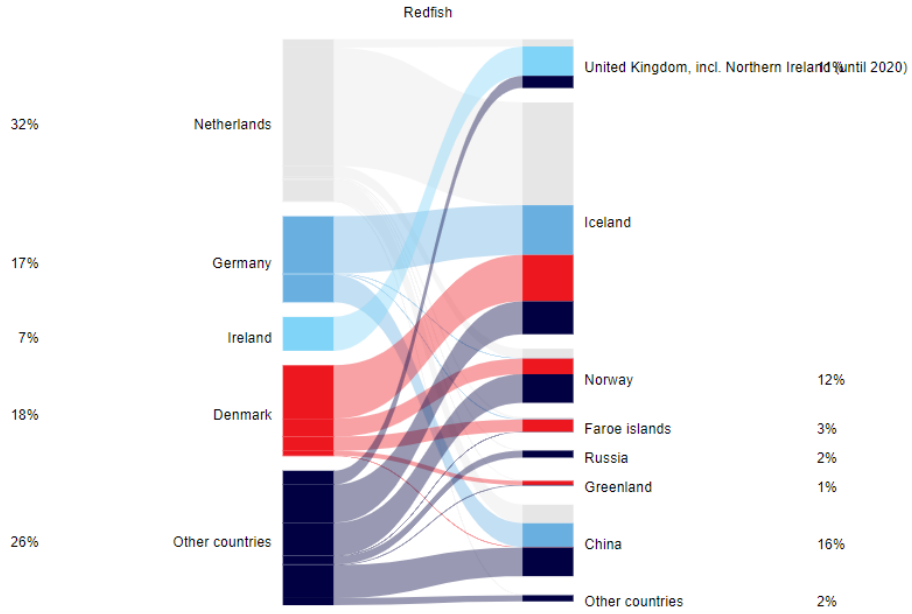
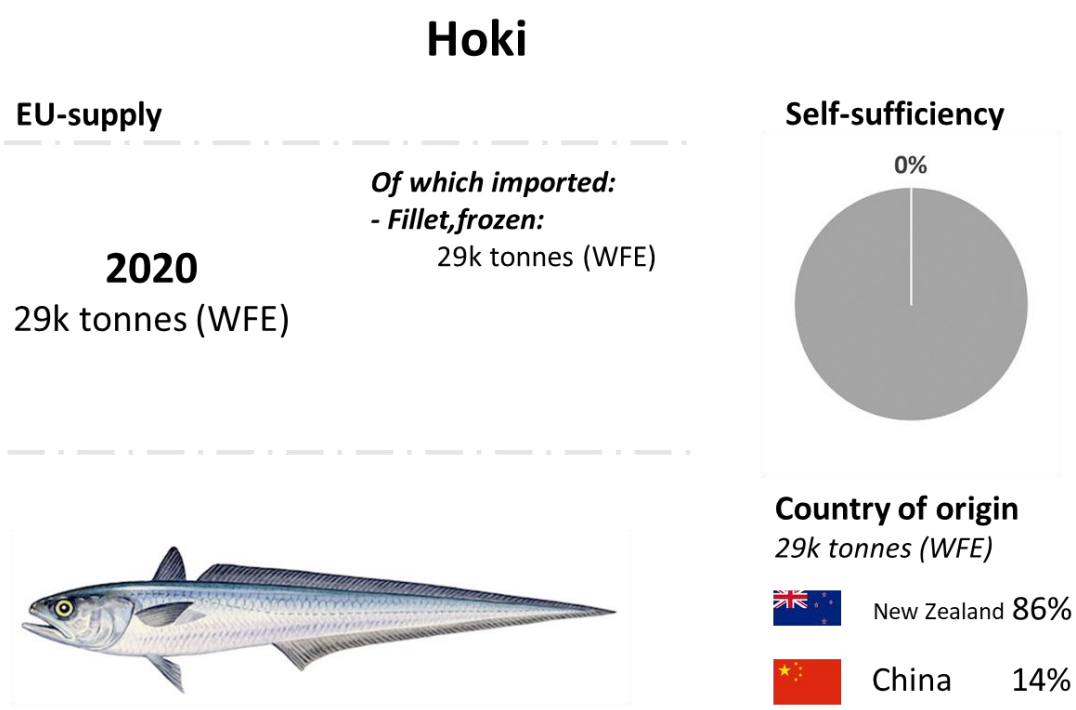



*Figure 5.2.6: EU-27 importers (left) and countries of origin outside the EU-27 (right) for redfish. Source: Eurostat, edited by WUR/AIPCE-CEP.*

Almost all the supplying countries for redfish are all in the EFTA region. In order to remedy the consequences of the withdrawal of the UK from the EU as regards the loss of preferential status of the British overseas countries and territories and to remedy the consequences of the expiry of the additional protocols with Norway and Iceland, a new ATQ regulation entered into force and applied from 1 January 2021. In these amending ATQs a quota of 1,3 thousand tonnes of fresh redfish fillets was added for the period 1st of May 2021 – 30th of April 2022.

Frozen whole redfish is responsible for 27% of the redfish import, followed by both frozen fillets and fresh redfish whole (both 30% of the redfish imports).

### 5.2.8 Hoki




*Source: Eurostat/Comext; EU Catch Report; FEAP*
*Edited by AIPCE-CEP 2021*

In 2020 hoki supply in the EU was 29 thousand tonnes. There is no EU catch for hoki so EU self-sufficiency is 0%.

The most important country for hoki is New Zealand. In 2020 86% of all EU import came from this country. Import from China reached 14%.

There is an ATQ allowance available for hoki. Frozen hoki fillets and meat for processing (09.2761) has a limit of 17,500 tonnes duty free import allowance.

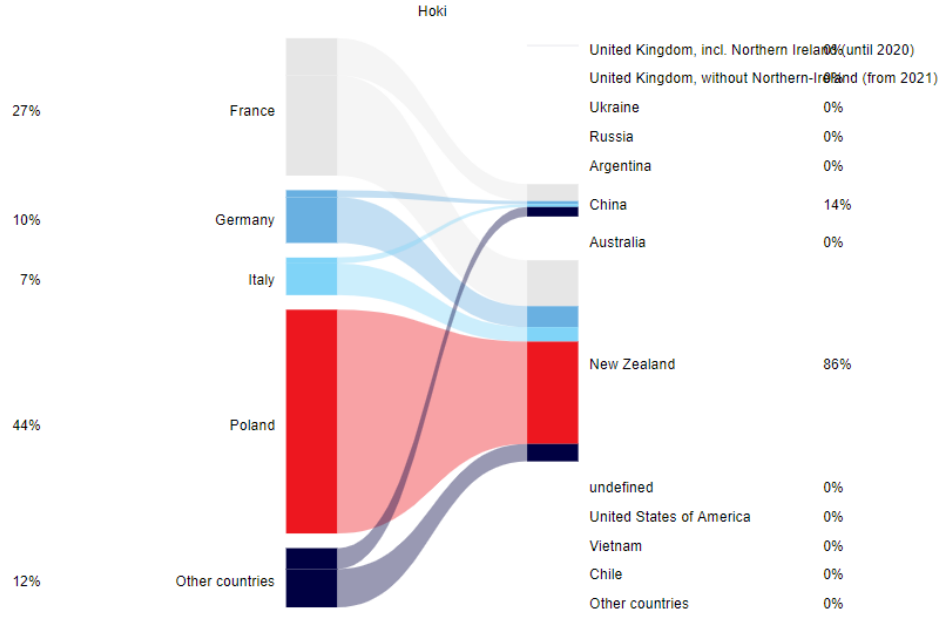
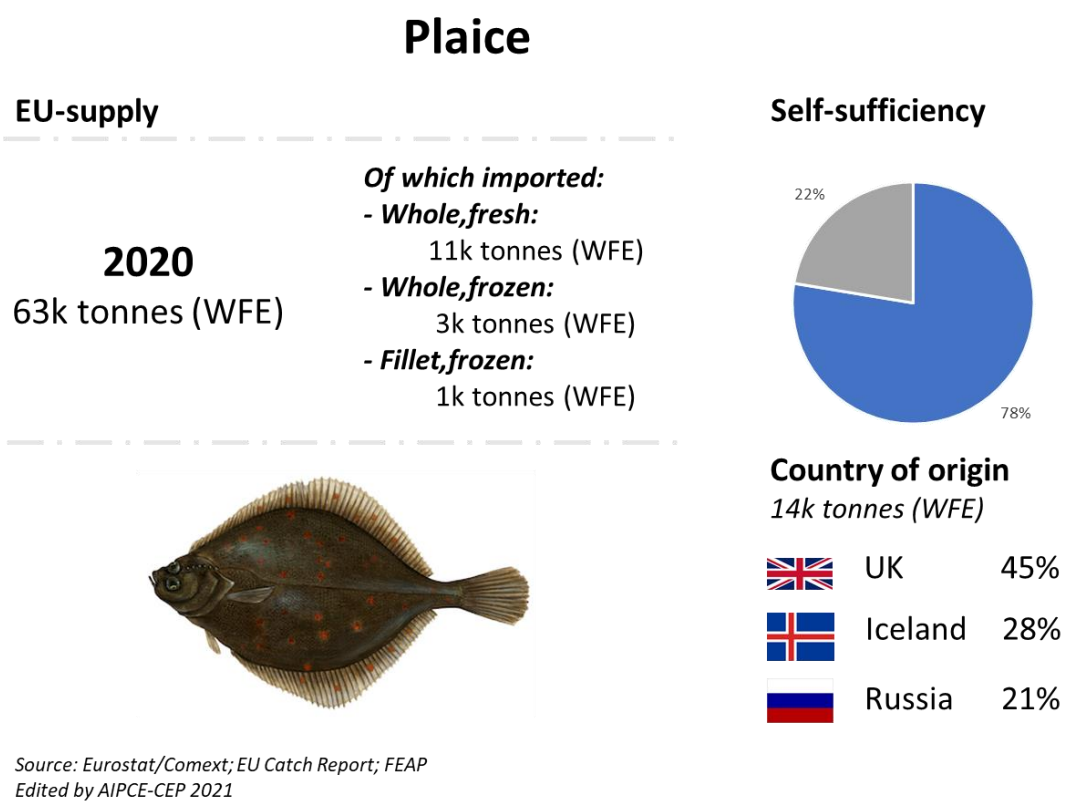



*Figure 5.2.7: EU-27 importers (left) and countries of origin outside the EU-27 (right) for hoki. Source: Eurostat, edited by WUR/AIPCE-CEP.*

Most hoki is imported via Poland or France. Frozen hoki fillets are responsible for almost all the import volume. Practically all hoki stays into the EU after import.

### 5.2.9 Plaice




*Source: Eurostat/Comext; EU Catch Report; FEAP*
*Edited by AIPCE-CEP 2021*

Plaice is not one of the main wild caught imported whitefish species because of high domestic landings, but it is of importance for the EU processing industry.

The EU plaice supply shows a decreasing trend for many years. Despite a very high quota limit for plaice of 145 thousand tonnes the utilisation has fallen away to a level of only 34% in 2020. EU catches decreased by 1/6$^{th}$ in 2020, to 49 thousand tonnes.

The EU self-sufficiency for plaice is high. In 2020 78% of all plaice came from EU fisheries. The import dependency increased compared with previous years. The exit of the UK is the main reason for this. Plaice from UK flagged vessels landed into EU harbours are now seen as third country imports. Import volume increased from 8 thousand to 14 thousand tonnes between 2019 and 2020 due to this development.

The most important country for plaice in 2020 was the UK (45%), followed by Iceland (28%) and Russia (21%).

There is a modest ATQ for haddock available for EU industry. An ATQ of 3,500 tonnes of H&G haddock (09.2824) was available for a 0% import duty allowance. In 2021 (until the end of October) 43% of this quotum was utilised (93% utilisation in 2020). It is questionable if the amount of 3,500 tonnes is high enough for covering the industry demand when growth is factored in.

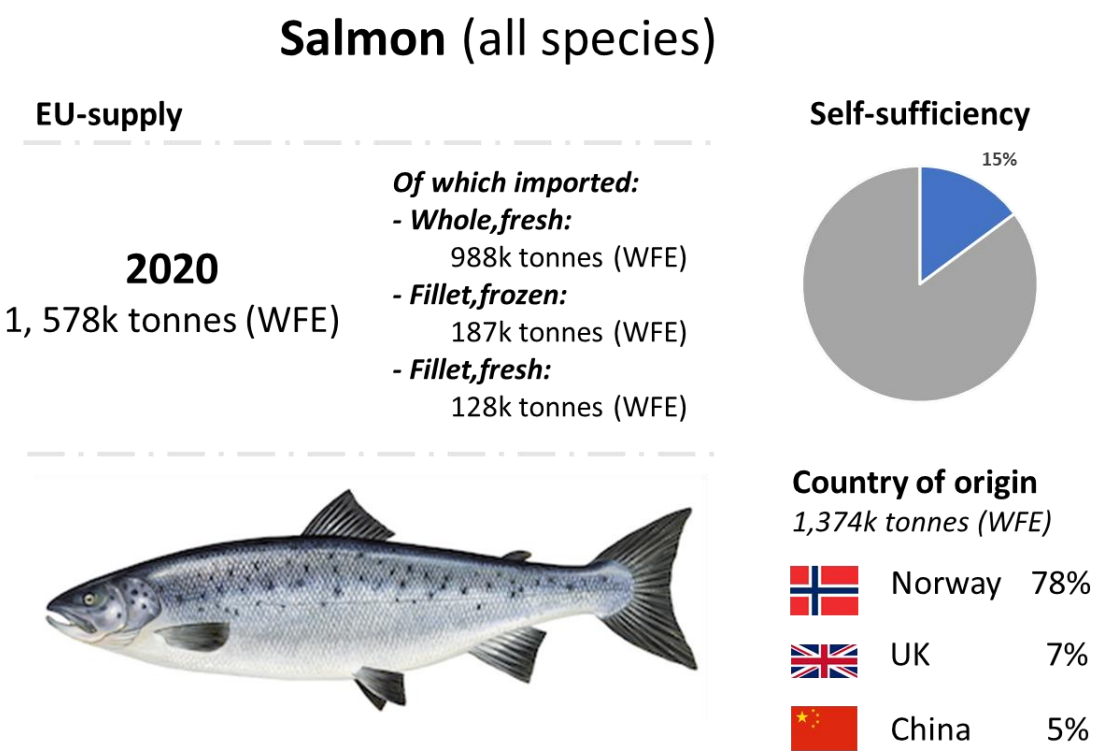
There are ATQ allowances for flatfish fillets (09.2778) available for EU industry. This ATQ allowance was fully utilised in recent years (also after a quota lift up to 10,000 tonnes in 2020). Quota was already fully utilized far before the end of the year.

In 2020 a new ATQ for whole frozen flatfish was introduced. With an ATQ allowance of 7,500 tonnes it is an extra possibility to import flatfish for the EU processing industry.

Fresh plaice whole are responsible for 74% of the plaice imports, followed by frozen whole plaice (23%).

## 5.3 Other fish species

### 5.3.1 Salmon




*Source: Eurostat/Comext; EU Catch Report; FEAP*
*Edited by AIPCE-CEP 2021*

Salmon is the most consumed seafood specie in the EU. From all salmon species, Atlantic salmon is the most important one. The total EU salmon supply keeps increasing and reached 1,587 thousand tonnes in 2020. From this supply 85% percent comes from outside the EU-27.

Fresh whole salmon is responsible for 72% of the total salmon imports, followed by frozen salmon fillets (14%) and fresh salmon fillets (9%).

An increasing amount of salmon is imported as raw material for processing in the EU-27. Most of the raw materials come from EFTA regions, like Norway, Iceland and Faroe Islands. Especially imports from Norway are of high importance, accounting for 78% of total salmon supply in 2020 (and 90% of the total whole fresh salmon supply in 2020). Norwegian salmon creates more jobs in the EU than it does in Norway. The import of 1,071 tonnes of Norwegian salmon to the EU-27 is good for then thousands of direct jobs for the EU seafood processing industry.

Salmon from Norway enters the EU-27 especially by road via border control posts of Sweden, Denmark and Poland, where the fish are processed and/or further distributed throughout the EU-27. Processing in the EU-27 is an interesting option for Norway, where labour in the EU is much lower, the import of unprocessed products will cost less import duty compared to processed products, and whole skin on salmon retains its quality better than processed products. Traditional EU wild caught processing plants are forced to diversify their processing assortment to stay solvent due to shortage of EU production. Salmon has become an essential processing species for these plants in especially Poland, Netherlands, Belgium, Denmark and France. Filleting and cold/warm smoking are the most important processing steps.

UK became an important new third country in 2020 where salmon products were imported from into the EU-27. Materials are mainly originated from Scotland mariculture of Atlantic salmon. 66% of the total imports of 97 thousand tonnes consisted of whole, fresh salmon.

COVID-19 didn't affect the consumption of salmon that much, because salmon has the benefits of being part of a stable well established retail assortment. Consumers were still able to buy salmon during lockdown and prepare it at home.

For 2021 it is expected that the import of salmon from the US will be significantly lower than the years before. At the end of 2020 an implementing regulation on compensatory measures in the Boeing/Airbus dispute entered into force where frozen whole salmon, fileted salmon and smoked salmon originated from the US received an additional duty of 25%. Additional duties ended in July 2021.

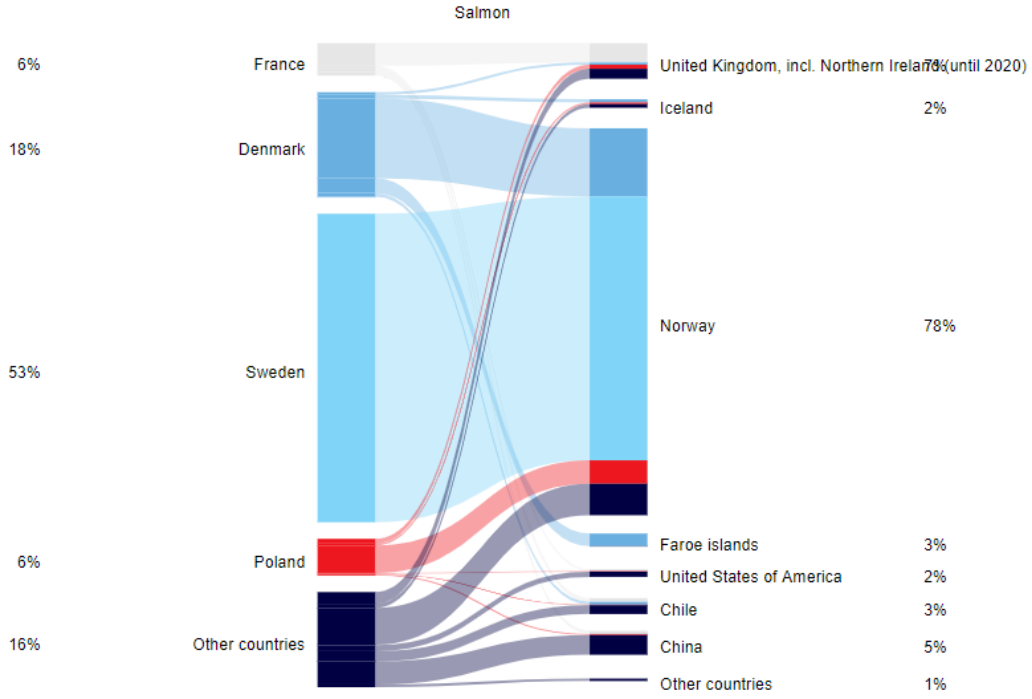
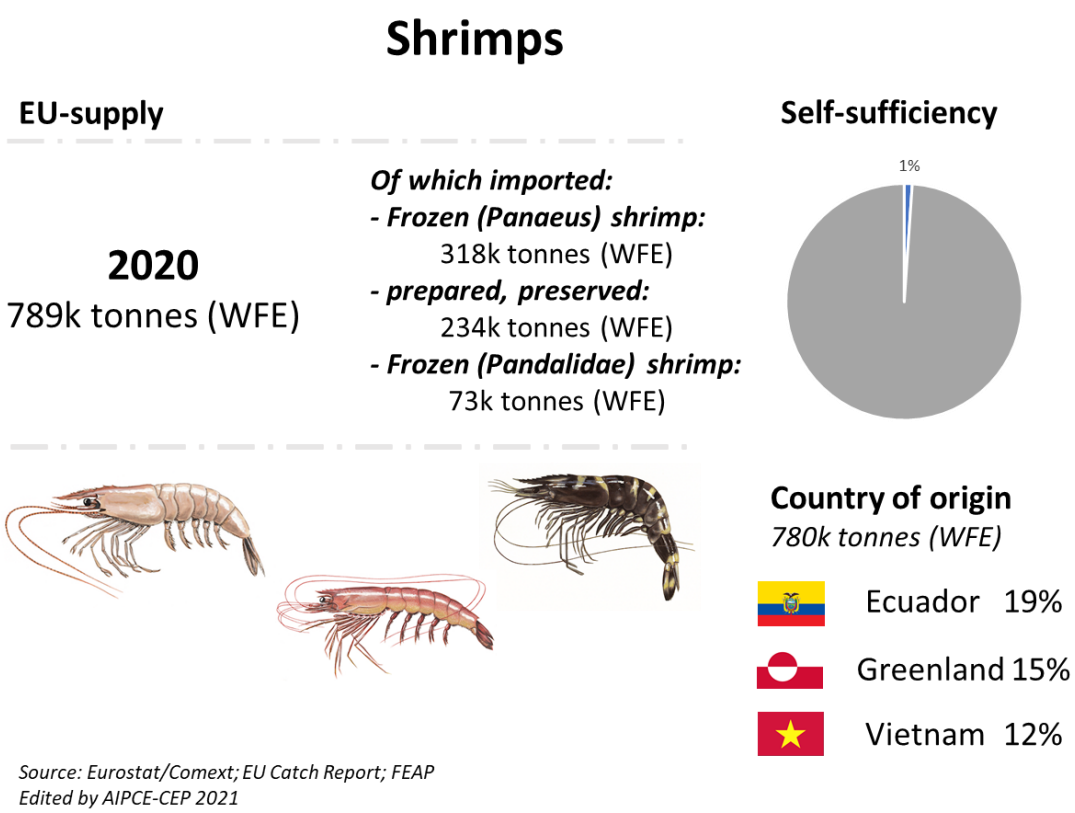



*Figure 5.3.1: EU-27 importers (left) and countries of origin outside the EU-27 (right) for salmon. Source: Eurostat, edited by WUR/AIPCE-CEP.*

There is an ATQ allowance available for frozen wild caught pacific salmon H&G, and fillets (Council Regulation (EU) 2020/1706). The total quota volume is 10.000 tonnes. However, utilisation was low in 2020, around 24%.

Around 225 thousand tonnes of available (processed) salmon products in the EU-27 were exported to third countries. UK (39%), USA (25%) and Switzerland (7%) were the most important importers.

### 5.3.2 Shrimp




The total shrimp supply accounted to 789 thousand tonnes in 2020. From this supply, 780 thousand tonnes of shrimp were imported from third countries and 9 thousand tonnes came from quoted shrimp fisheries in the EU. This shows that the EU is heavily depending on imports for shrimp.

Most of the shrimp were imported from Ecuador (19%; Pacific white shrimp), Greenland (15%; Borealis shrimp), Vietnam (12%; Pacific white shrimp & black tiger shrimp), Argentina (10%; Argentine red shrimp) and India (8%; Pacific white shrimp & black tiger shrimp).

Most of the shrimp producing third countries that export to the EU do have a GSP or a free trade agreement (Ecuador, Vietnam and Canada) in force where shrimp are imported under reduced or zero import tariffs.

For cold water shrimp there are three ATQs available for the key pandalus species of borealis, montagui and jordani in 2019 (09.2794, 09.2798, 09.2800). Total allowance decreased to 8,5 thousand tonnes due to the introduction of CETA.

Warm water prawns have a separate ATQ (09.2802). In recent years quota was 30 thousand tonnes, that was used up in the first half of the years. For 2019 40 thousand tonnes was agreed and since 2021 there is a quota allowance of 48,000 tonnes. At the end of October 75% of the quota was utilised.

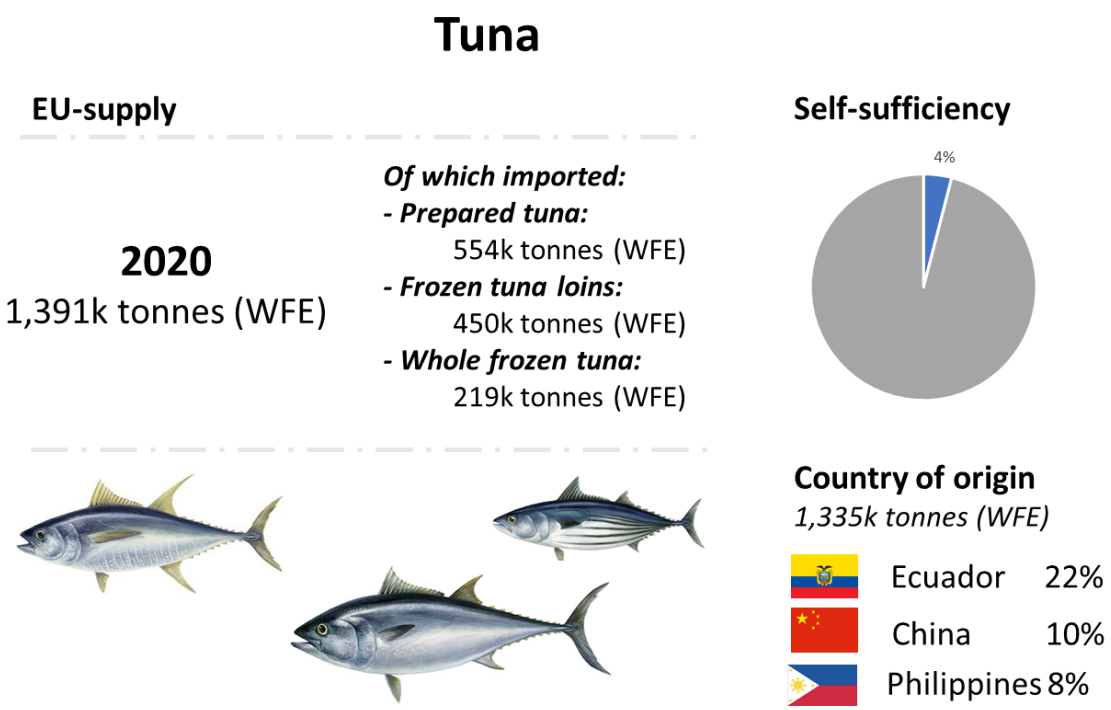
Frozen Penaeus shrimp was responsible for 41% of total import in 2021, followed by prepared and preserved (cooked) shrimp (30%).

Shrimp products from India and Vietnam are exported into both Southern and Northern Europe as both prepared as whole products. Shrimp from Ecuador are imported into especially the South of Europe as whole raw and unpeeled.

Argentine red shrimp are imported mainly by Spain and Italy for the Southern European market.

Borealis shrimp from Greenland and Canada are mainly imported via Denmark and (re-)exported into the rest of the EU.

### 5.3.3 Tuna




*Source: Eurostat/Comext; EU Catch Report; FEAP*
*Edited by AIPCE-CEP 2021*

Tuna is one of the top 3 species consumed in the EU. Skipjack tuna and yellowfin tuna are the most important tuna species in terms of volume. Other important species are bigeye tuna, albacore tuna and bluefin tuna.

Total supply of tuna products from third countries accounted to 1,391 thousand tonnes in 2020. From this total EU fisheries landed in total 56 thousand tonnes of tuna in 2020, which realises a self-sufficiency of 4%.

Most important country for tuna in 2020 was Ecuador (22%), followed by China (10%) and Philippines (8%). Ecuadorian tuna benefit from a free trade agreement between EU and Ecuador.

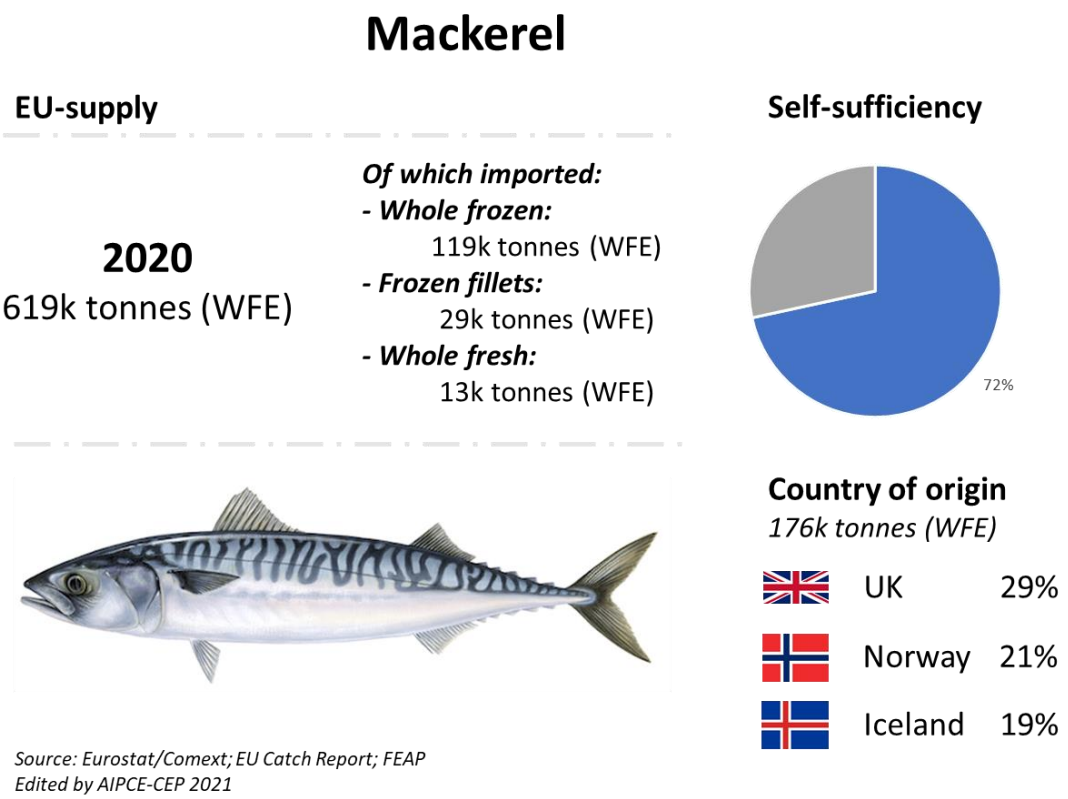
However, the supply of large pelagics such as tuna are governed by complex relationships between the EU and the locale of catch. EU flagged vessels operating under licence in many distant water fisheries which in itself provides substantial employment and fishing activity for EU vessels and processors.

With an average annual production of more than 370,000 tonnes, the EU canned tuna industry supplies only 46% of the EU market, with Spain, Italy, Portugal and France as main producers. It provides 20,140 direct jobs in the EU and 60,660 indirect jobs in the supporting sectors. This industry is located in areas highly dependent on fisheries and fish processing. As the recently EUMOFA report exposed, tuna loins have allowed the canning industry to maintain its competitiveness and its activity in the EU, which otherwise would have faced difficulties competing with factories located near the fishing areas. So it avoided the risk of a delocalization of production facilities outside EU.

There is a modest ATQ (09.2790) of 35 thousand tonnes for tuna loins for further processing that is exhausted very quickly – within days of opening – but in total actually represents only a small fraction of the total trade.

Most tuna is imported in a prepared format (cans), 42% in 2020. Tuna loins (for canning) represent 34% of total import.

### 5.3.4 Mackerel




*Source: Eurostat/Comext; EU Catch Report; FEAP*
*Edited by AIPCE-CEP 2021*

Mackerel is one of the most important small pelagic commercial species in the world. The global annual catches of mackerel have totalled around one million tonnes in recent years, with the main catching nations being the EU, UK, the Faroe Islands, Greenland, Iceland, Norway and Russia.

Small pelagics such as mackerel are important species in the EU fishery complex and comprise the largest proportion of the tonnages taken in EU waters under quota species. The EU supplied in total 443 thousand tonnes of Mackerel in 2020.

With a percentage of 72% self-sufficiency in the EU is high. The 176 thousand tonnes of mackerel that is imported into the EU comes from especially UK (29%; 51 thousand tonnes in 2020), Norway (21%; 36 thousand tonnes in 2020) and Iceland (19%; 34 thousand tonnes in 2020).

Mackerel from the North East Atlantic Fisheries is of high importance for the EU seafood market. In 2019 there was a lack of agreement between coastal states about the fishing rights for 2020 showing the complexity of a multi-national management of fish stocks. This meant that the mackerel stock in this area was being fished at levels beyond the scientific advice and couldn't be sold under the MSC label at this moment.

Early 2021 Norway and Faroe Islands unilaterally increased their share in mackerel fisheries, which let to new disagreements about fishing rights.

At the end of 2021 a delegation of the EU, Faroe Islands, Greenland, Iceland, Norway, Russian Federation and UK reached an agreement on the management measures for mackerel for 2022. The TAC (794,920 tonnes) have been set according to the scientific advice from ICES. It is important to reach an agreement regarding quota allocation to prevent having disruptive consequences that will affect the rest of the supply chain.

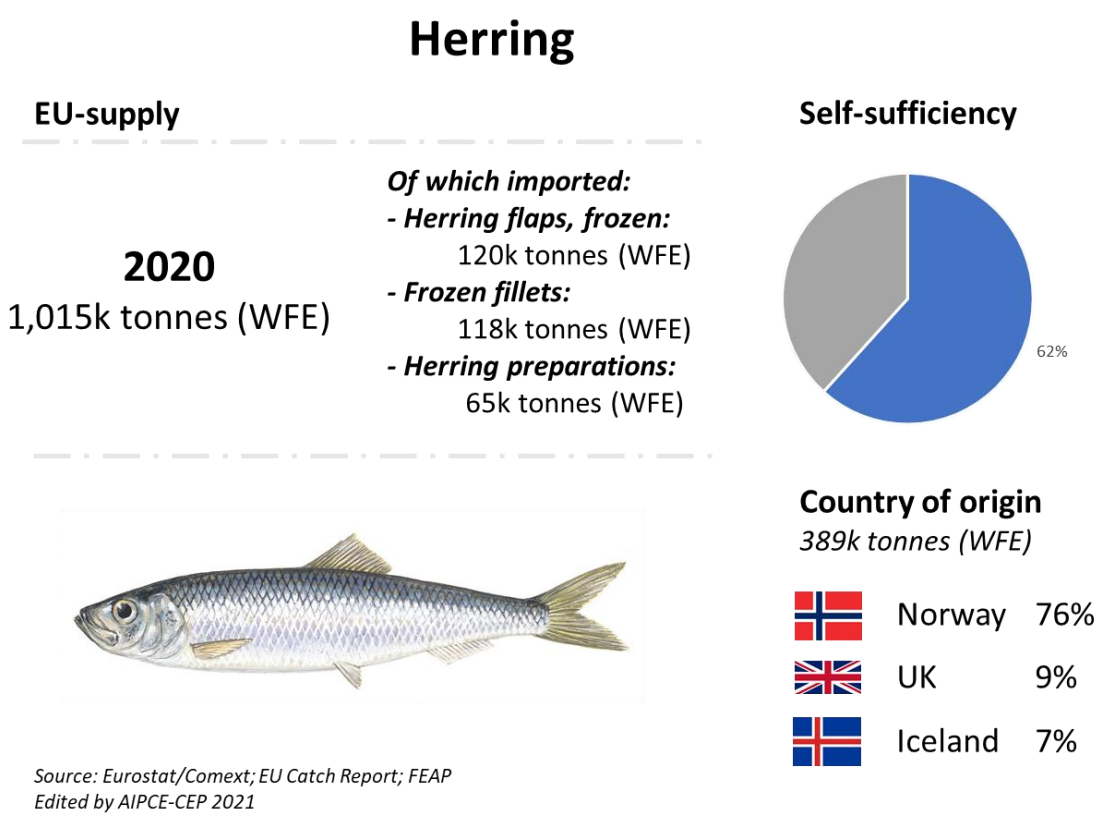
EU TAC in 2020 was 447 thousand tonnes and almost fully used in that year. The total TAC for the North East Atlantic mackerel in 2020 reached 1,090 thousand tonnes. For 2021 it is expected that this mackerel TAC will be higher (1,199 thousand tonnes), keeping in mind that the quota are not internationally agreed.

Almost all the supplying countries for mackerel are all in the EFTA region. However, there is an ATQ of 5 thousand tonnes (under 5% import tariff) available for chub mackerel (whole, fillets and flaps).

Frozen mackerel whole accounts for 68% of the mackerel imports, followed by frozen mackerel fillets (17%).

188 thousand tonnes of mackerel were exported outside the EU27. Especially as whole frozen or prepared and preserved. Nigeria (19%), Egypt (15%) and UK (13%) were most important third countries the EU27 exported to.

### 5.3.5 Herring




Small pelagics such as herring are important species in the EU fishery complex and comprise the largest proportion of the tonnages taken in EU waters under quota species. The total herring EU supply reached 1,015 thousand tonnes in 2020.

With a TAC of 657 thousand tonnes in 2020 herring is the largest individual species tonnage caught under EU management and in its waters. The EU self-sufficiency for herring is high with a percentage of 62% in 2020.

At the end of 2021 a delegation of the EU, Faroe Islands, Greenland, Iceland, Norway, Russian Federation and UK reached an agreement on the management measures for Atlanto-Scandian herring in the North East Atlantic for 2022. The TAC (598,588 tonnes) have been set according to the scientific advice from ICES.

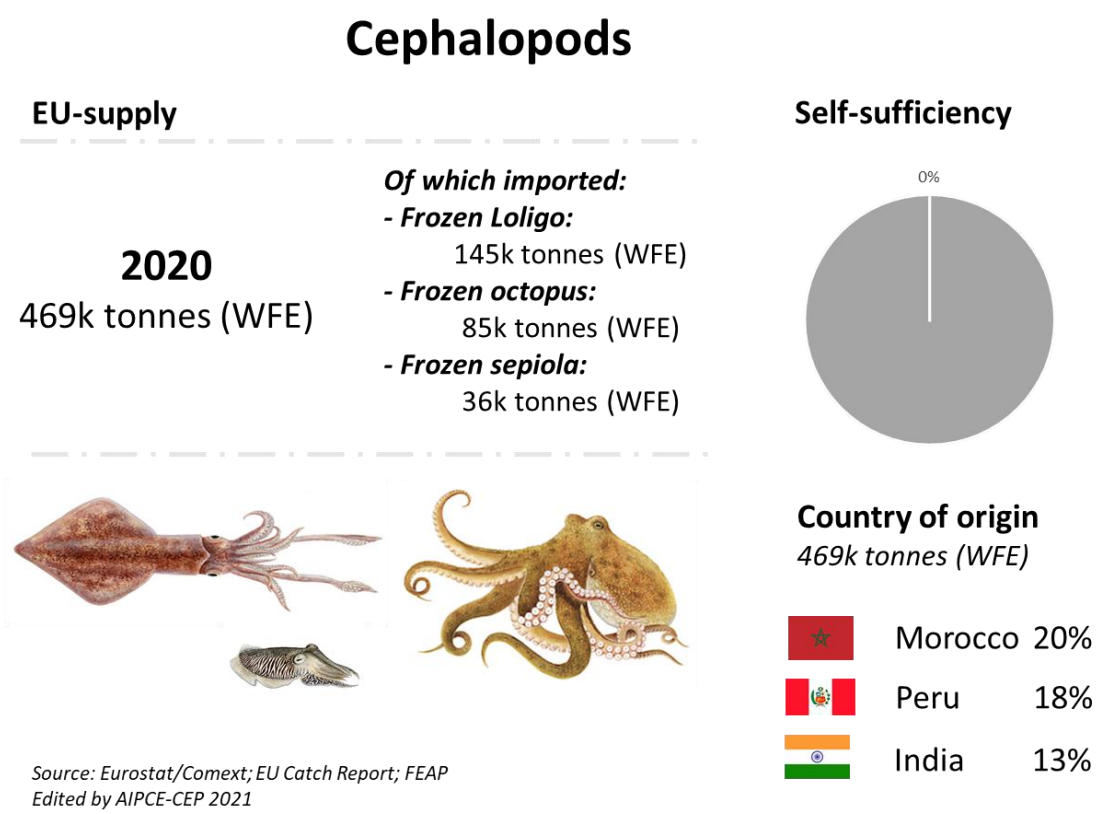
There are several ATQs available for herring. A quota of 10 thousand tonnes is available for herrings, of a weight exceeding 100 g per piece or flaps of a weight exceeding 80 g per piece, excluding livers and roes, for processing. Another ATQ of 5 thousand tonnes (under 10% import tarrif) is available for herrings, spiced and/or vinegar-cured, in brine, preserved in barrels of at least 70 kg net drained weight, for processing.

In order to remedy the consequences of the withdrawal of the UK from the EU as regards the loss of preferential status of the British overseas countries and territories and to remedy the consequences of the expiry of the additional protocols with Norway and Iceland, a new ATQ regulation entered into force and applied from 1 January 2021. In these amending ATQs a quota of 22.5 thousand tonnes of herrings, spiced and/or vinegar-cured, in brine, for processing was added. Other herring quota added were frozen herring for processing (15 thousand tonnes) and fillets (25 thousand tonnes) or flaps (12.5 thousand tonnes) of herring.

Frozen herring flaps were responsible for 31% of the herring imports in 2020, followed by frozen fillets (30%). Norway is the most import third country for herring imports (76%: 295 thousand tonnes in 2020), followed by UK (9%; 35 thousand tonnes) and Iceland (7%; 29 thousand tonnes).

244 thousand tonnes of herring was exported to third countries in 2020 containing especially whole frozen herring. The most important exporting third countries are Nigeria (32%), Egypt (22%) and Ukraine (17%).

### 5.3.6 Cephalopods




The main products that fall under cephalopods are squid, cuttlefish and octopus. The total cephalopods EU supply in 2020 was 469 thousand tonnes. Important cephalopod species are loligo squid and common octopus.

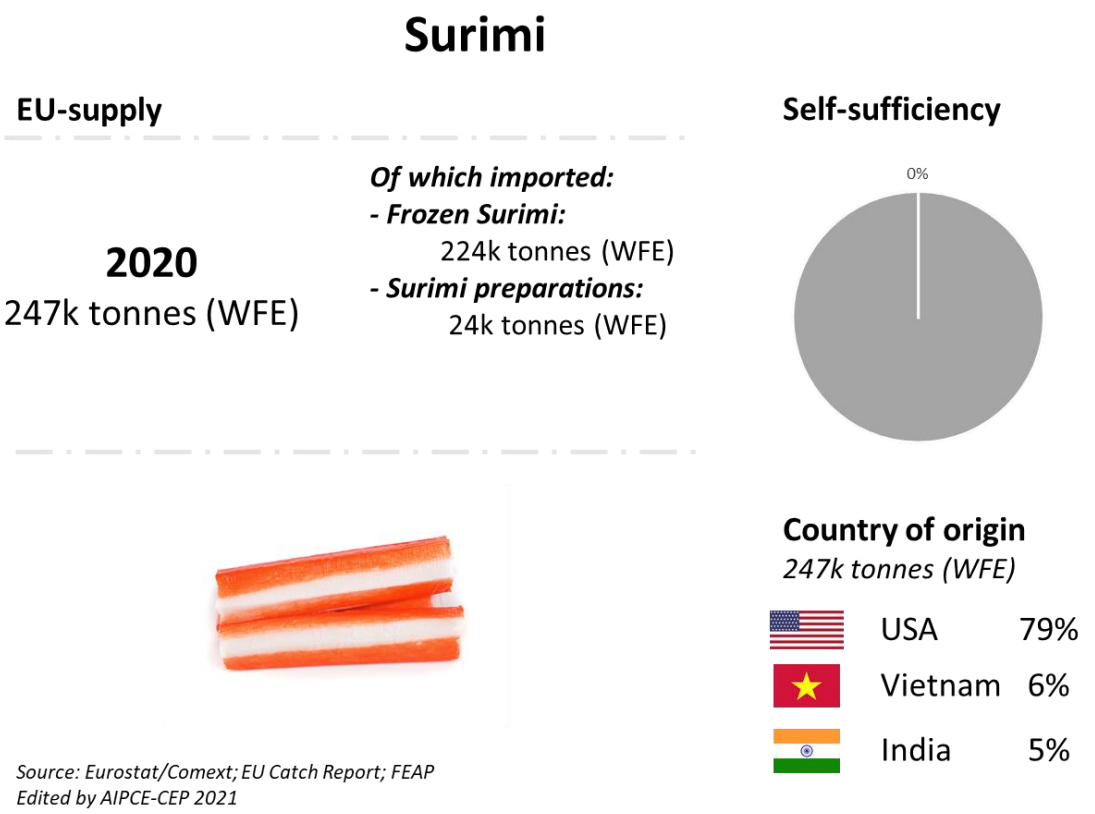
The most important countries for cephalopods in 2018 were Morroco (20%), Peru (18%) and India (13%).

Frozen Loligo squid was responsible for 34% of total import in 2020 (162 thousand tonnes), followed by frozen octopus (18%). Most of the cephalopods are consumed in the Southern European countries. These countries are familiar with cephalopods.

Cephalopods caught in the EU do not fall under a quota system (and thereby not included in the info-graphic above). However, there is a significant fisheries on cephalopods (squid, cuttlefish and octopus), catching around 200 thousand tonnes of cephalopods yearly.

Main exporting countries for cephalopods are USA, Morocco, Switzerland and UK.

### 5.3.7 Surimi




Surimi refers to a paste made from fish. Surimi is a concentrate of whitefish. Main species used are Alaska pollock, blue whiting, blue grenadier and Pacific hake.

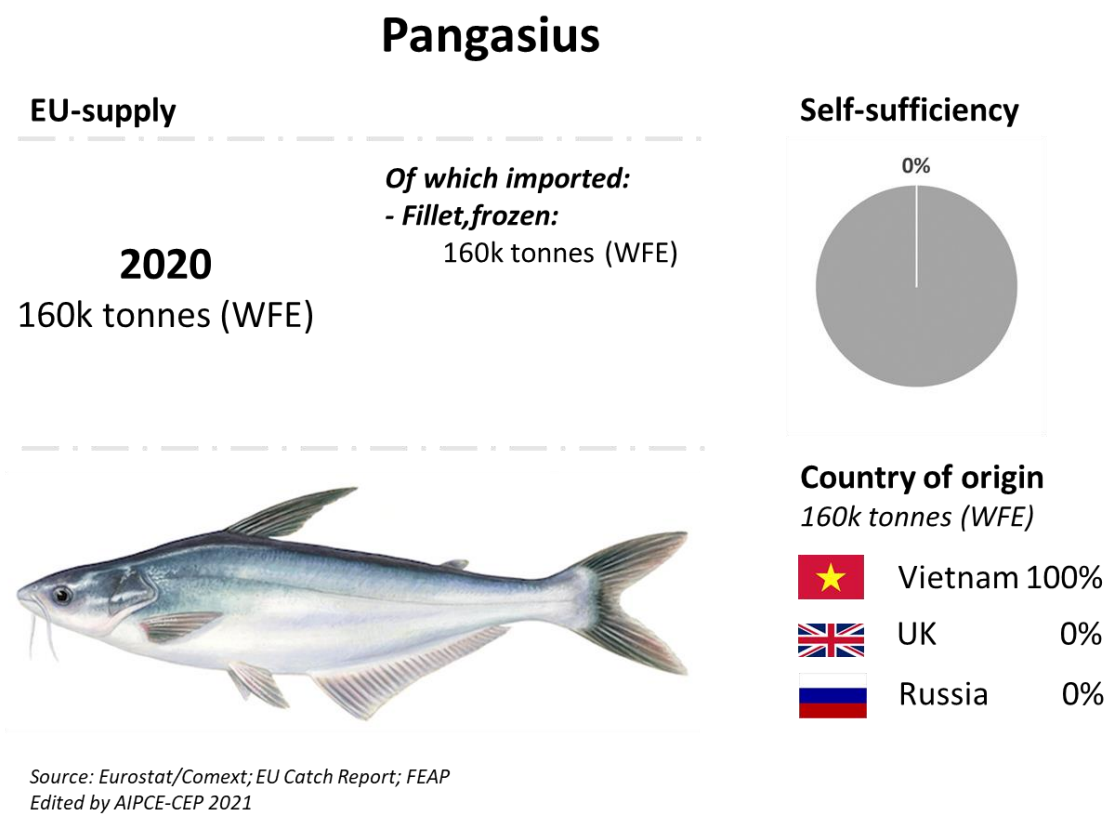
Surimi base (frozen as blocks) are sold to food processors, which transform the material with other ingredients to give it texture, taste and color. Most common surimi product in the EU is imitation crab As sticks. Most such preparations are ready to eat.

The import volume of surimi was 247 thousand tonnes in 2020. The most important country for surimi in 2020 was USA (79%), followed by Vietnam (6%) and India (5%).

The main surimi processors in the EU are France, Spain and Lithuania. Frozen surimi was responsible for 90% of the surimi imports. The other 10% of imports in 2020 consisted of frozen surimi presentation -in other words finished products-.

There is an ATQ allowance available for surimi as a raw material for further processing (09.2772). Around 90% of total agreed quantity (60 thousand tonnes) was utilised in 2020.

### 5.3.8 Pangasius



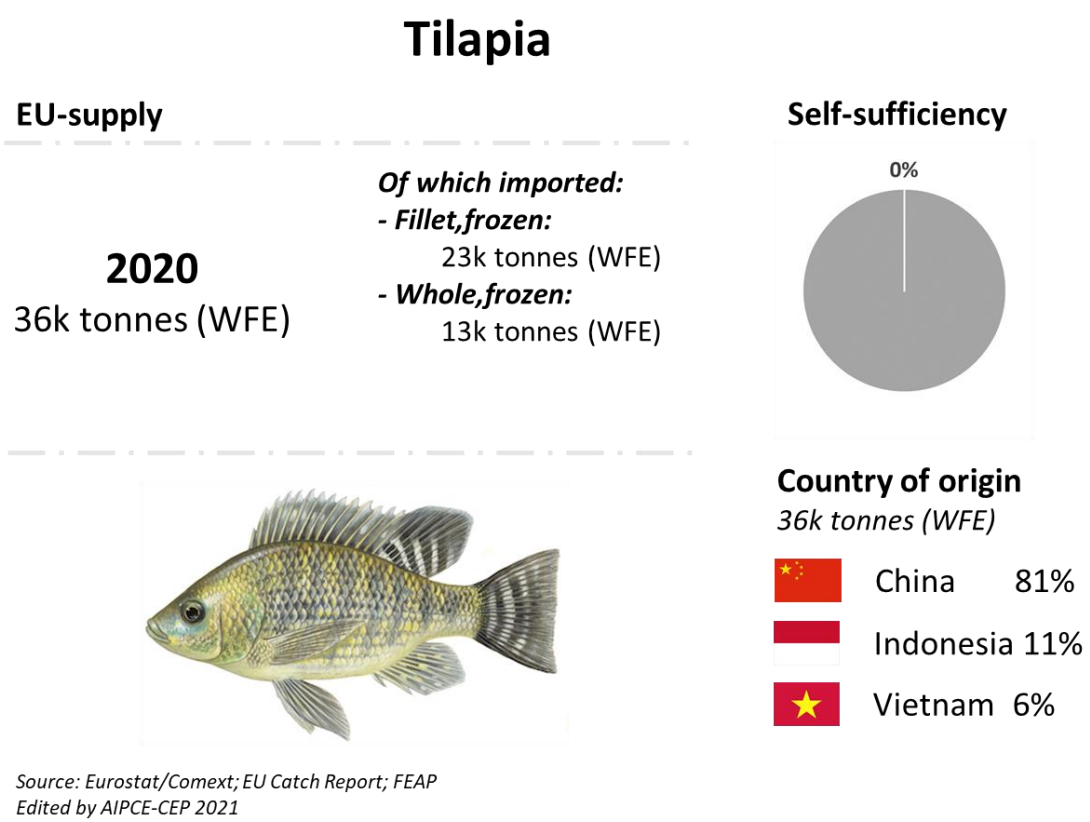

*Source: Eurostat/Comext; EU Catch Report; FEAP*
*Edited by AIPCE-CEP 2021*

Pangasius is one of the key cultivated finfish species across the globe. The EU in market terms actually represents only a tiny percentage of the consumption. Pangasius has been declining sharply in EU consumption and is now less than 25 percent of its historical peak.

EU pangasius supply continued to decrease to 160 thousand tonnes in 2020. There is no EU production for pangasius. EU self-sufficiency is 0%.

Pangasius is an aquaculture product, mainly produced in Vietnam. >99% of the import volume in 2020 came from this third country (160 thousand tonnes). Almost all pangasius was imported as frozen fillets (>99%).

### 5.3.9 Tilapia




*Source: Eurostat/Comext; EU Catch Report; FEAP*
*Edited by AIPCE-CEP 2021*

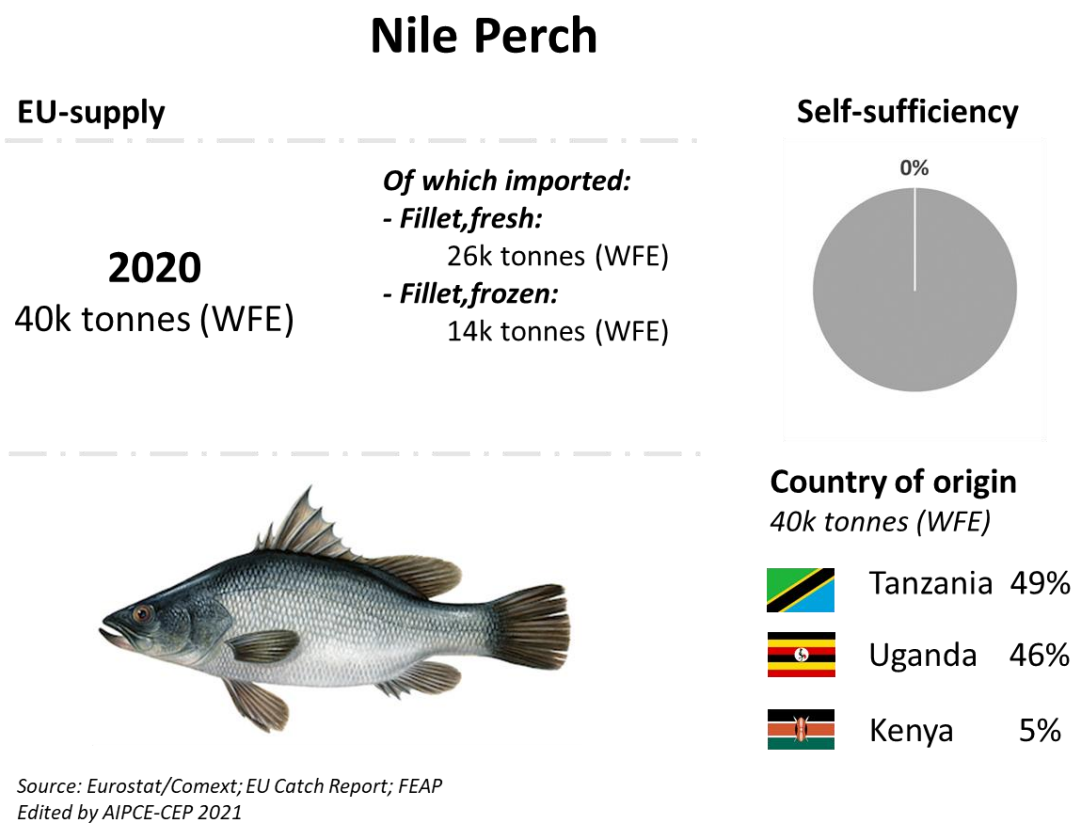
Tilapia is one of the key cultivated finfish species across the globe second in scale only to Chinese carp. The EU in market terms actually represents only a tiny percentage of the consumption. Tilapia has a global supply of several million tonnes yet the EU, by AIPCE-CEP estimates, consumes only around 36 thousand tonnes or about 1% of global supply in 2020.

There is practically no EU production for tilapia. EU self-sufficiency is negligible.

Tilapia is an aquaculture product with production in several regions of the world. 81% of the EU import volume in 2020 came from China (29 thousand tonnes). Other important countries were Indonesia (11%) and Vietnam (6%).

Most of the tilapia was imported as frozen fillets (64%), followed by frozen whole tilapia (36%).

### 5.3.10 Nile perch




*Source: Eurostat/Comext; EU Catch Report; FEAP*
*Edited by AIPCE-CEP 2021*

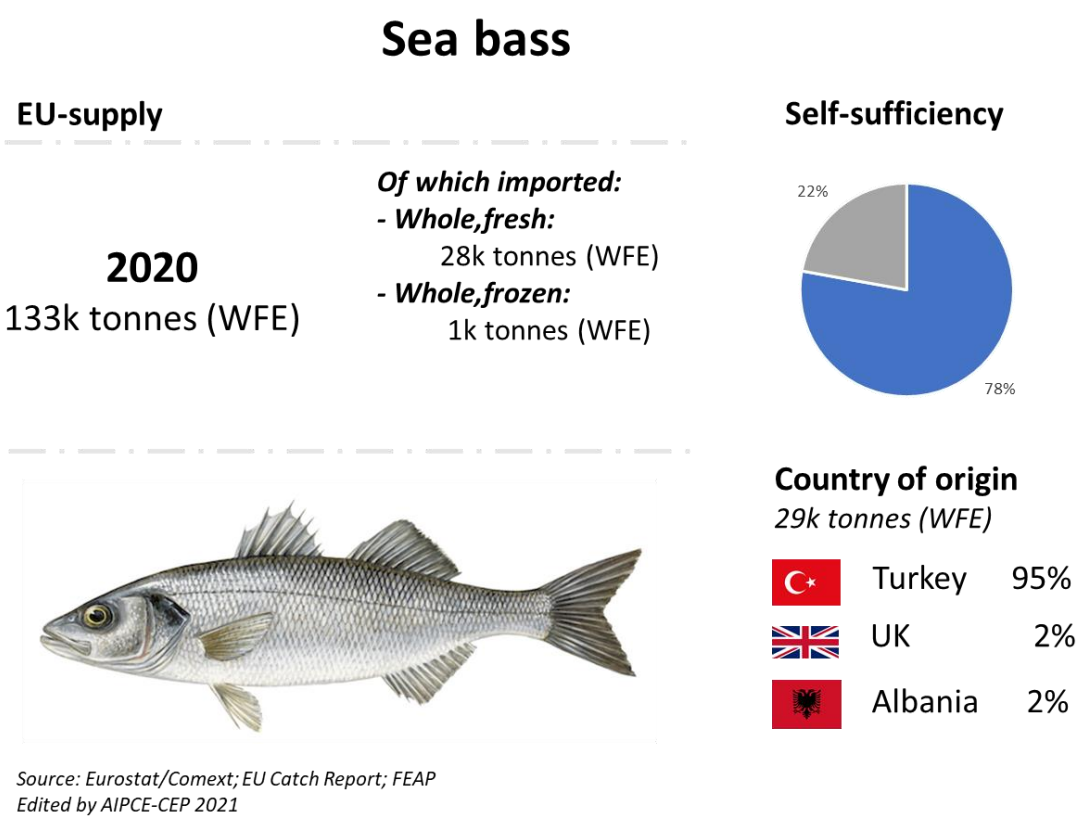
Nile perch is the most important fresh water export product from Eastern Africa. Almost all Nile perch comes from Uganda, Tanzania or Kenya. The EU imported 40 thousand tonnes of Nile perch in 2020

There is no EU production for Nile perch. EU self-sufficiency is 0%.

Most important countries for Nile perch in 2020 were Tanzania (49%; 19 thousand tonnes), followed by Uganda (46%; 18 thousand tonnes) and Kenya (5%; 2 thousand tonnes). Nile perch volumes from all countries decreased, mainly due to the non-available airfreight for fresh Nile perch due to covid.

Still most of the Nile perch was imported as fresh fillets (66%). This product is imported into the EU using the superchilling technique - *a technique that reduces the temperature of fish uniformly to a point slightly below that which is obtained in melting ice* -. Nile perch frozen fillets were good for the other 34% of the total EU import in 2020.

### 5.3.11 Sea bass




*Source: Eurostat/Comext; EU Catch Report; FEAP*
*Edited by AIPCE-CEP 2021*

Together Sea bass and Sea bream are two of the most successful species cultivated in the EU. Fish are farmed in sea cages or raceways. There is a very small amount of wild capture Sea bass.

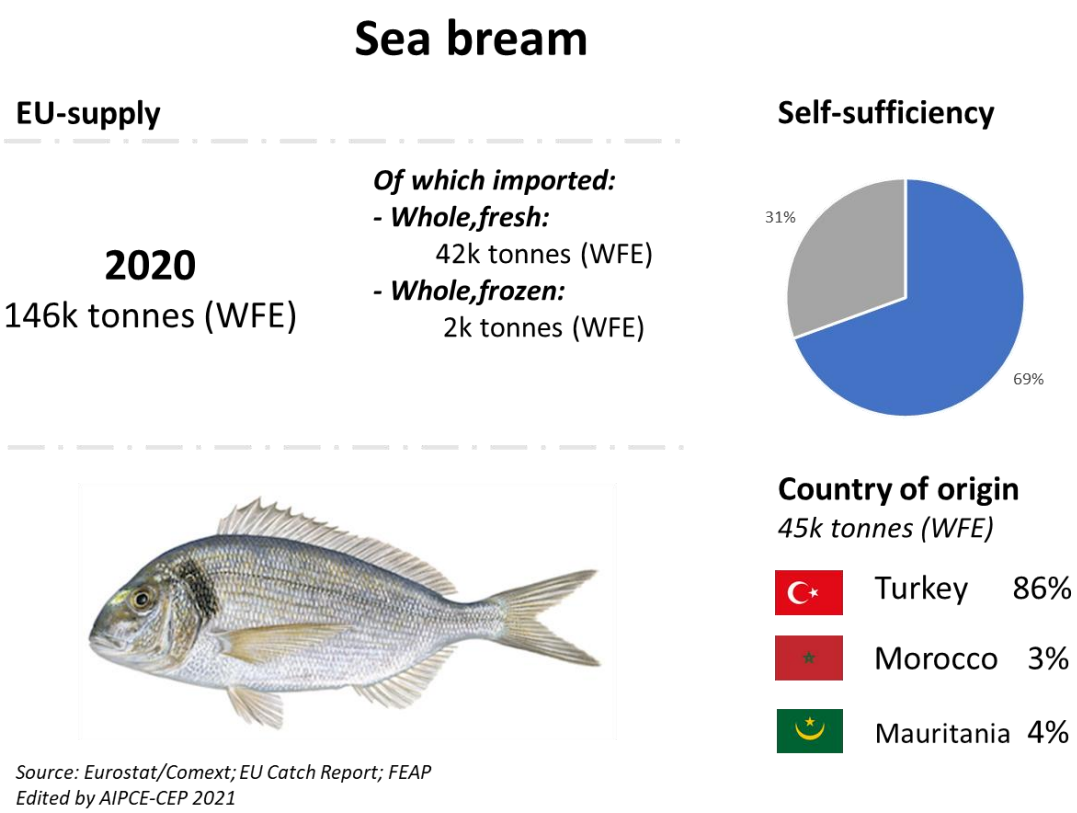
EU cultivated sea bass reached the volume of 103 thousand tonnes in 2020. Self-sufficiency reached 78%.

The main EU producers of sea bass are Greece, Spain, Italy and France.

The most important third country for sea bass in 2020 was Turkey. 95% of all import came from this country.

Most of the sea bass was imported as fresh whole product (96%).

### 5.3.12 Sea bream




*Source: Eurostat/Comext; EU Catch Report; FEAP*
*Edited by AIPCE-CEP 2021*

Together Sea bass and Sea bream are two of the most successful species cultivated in the EU. Fish are farmed in sea cages or raceways.

There is a small level of wild capture in Sea bass in the EU. However, most of 101 thousand tonnes EU production (99%) came from aquaculture. Self-sufficiency was 69%.

Sea bream are consumed as whole fish can be marketed in different sizes (typically around 400-600 grams).

The Main EU producers are Greece, Spain and Italy.

Import volume reached to 44 thousand tonnes in 2020. Most important country for sea bream in 2020 was Turkey (86%), followed by Morocco (3%) and Mauritania (4%).

Most of the sea bream was imported as fresh whole product (95%).

# 6 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 since 1992 and provides insight into the changes that have occurred to the seafood market during that time. AIPCE-CEP remains confident 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. AIPCE-CEP members 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@kellencompany.com). There are also further publications and commentaries at our website: www.aipce-cep.org.

The Finfish tables can be requested by members via the AIPCE-CEP secretariat (aipce@kellencompany.com).