



# FINFISH STUDY AIPCE-CEP

SEPTEMBER 2023





# Finfish Study 2023

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, September 2023

Turenhout, M.N.J., Melgaard Jensen P., Keller M., Schimke A., Kuyk A., Short M., Sipic K., 2023. *Finfish Study 2023*. AIPCE-CEP report, Brussels

AIPCE CEP wishes to thank Simon Rilatt for the years-long valuable engagement in this Study.

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

# Contents

- Foreword..... 7
- 1 Introduction..... 9
  - 1.1 Aim of the Finfish Study ..... 9
  - 1.2 Used data ..... 10
- 2 Consumption and supply..... 11
  - 2.1 Key findings ..... 11
  - 2.2 Food balance..... 11
    - 2.2.1 EU domestic supply ..... 11
    - 2.2.2 Imports from third countries..... 11
    - 2.2.3 Total supply..... 11
    - 2.2.4 Export to third countries..... 11
    - 2.2.5 Total consumption..... 11
    - 2.2.6 Total consumption per capita ..... 12
    - 2.2.7 Self-sufficiency ..... 12
    - 2.2.8 Current trends..... 14
- 3 Regulatory review ..... 15
  - 3.1 Autonomous Tariff Quotas (ATQs)..... 15
    - 3.2.1 TCA Agreement UK ..... 15
    - 3.2.2 EVFTA Vietnam ..... 16
    - 3.2.3 EPA Japan ..... 16
    - 3.2.4 Other trade agreements..... 16
  - 3.3 EEA Agreement: Revising quotas within the Financial Mechanism EU - Norway/Iceland for 2021-2028  
16
  - 3.4 IUU and CATCH..... 16
- 4 Russian war on Ukraine ..... 18
- 5 Product category ..... 19
  - 5.1 General ..... 19
  - 5.2 Whitefish ..... 19
    - 5.2.1 General ..... 19
    - 5.2.2 Cod..... 22
    - 5.2.3 Saithe..... 24
    - 5.2.4 Hake ..... 25
    - 5.2.5 Alaska Pollock ..... 27
    - 5.2.6 Haddock ..... 28
    - 5.2.7 Redfish ..... 30
    - 5.2.8 Hoki..... 31
    - 5.2.9 Plaice ..... 32
  - 5.3 Other fish species..... 34
    - 5.3.1 Salmon ..... 34

5.3.2	Shrimp.....	36
5.3.3	Tuna .....	38
5.3.4	Mackerel.....	40
5.3.5	Herring .....	41
5.3.6	Anchovies.....	43
5.3.7	Sardines .....	44
5.3.8	Cephalopods.....	45
5.3.9	Surimi.....	47
5.3.10	Pangasius .....	48
5.3.11	Tilapia .....	49
5.3.12	Nile perch.....	50
5.3.13	Sea bass.....	52
5.3.14	Sea bream.....	53
6	In Conclusion .....	55

## Foreword

The Finfish Study has been prepared by and for the seafood processing and trade industry in Europe. For more than 30 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.

In late 2022 suppliers received goods at very high prices. The industry sustained the increases to secure supplies for their clients. Sales dropped in late 2022 leaving cold stores with unsold product. Consumers turned to cheaper species or meat and poultry. This situation has persisted through 2023 resulting in much lower financial returns for most companies in the EU compared to the year before.

Traders and industry are furthermore affected by the market pressure to reduce supplies from Russia. Brexit continues to complicate trade between UK and the EU and negotiations between the EU and Norway are not settled yet.

The EU fish processing and trading industry has been a driver in making sourcing and sales of seafood truly global for decades, it is however now facing pressure on the international market. More 3<sup>rd</sup> countries set standards different to those of the EU, most importantly China, while new trade and cooperation agreements are delayed.

The biggest challenge to our traders and processors remains sourcing raw material. The dependence on imports remains very high, and it is becoming increasingly difficult to find suitable labour.

The global value chains for seafood have proven resilient despite these facts. Trade tools such as the ATQ system are crucial to the survival and growth of the industry, particularly in times when markets are turbulent.

Guus Pastoor

AIPCE President



Peter Bamberger

CEP President







# 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 focus on the volume aspect of trade and not its 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 the global stage. The sector represents one of the largest sectors

### 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 the basis of a cooperation agreement, creating AIPCE-CEP. AIPCE-CEP comprises 18 EU National Associations and 3 associations from third countries. The sectors AIPCE-CEP represent account for more than 3,300 enterprises and 116,000 jobs.



**31 Billion turnover<sup>1</sup>**



**3,300 enterprises<sup>1</sup>**



**116,000 direct employees<sup>1</sup>**



**8.9 million tonnes/year EU import<sup>2</sup>**



**2.2 million tonnes/year EU export<sup>2</sup>**

<sup>1</sup>Source: AER fish processing 2021, edited by AIPCE-CEP

<sup>2</sup>Source: Eurostat (EU27), year 2022 edited by AIPCE-CEP (WFE)

The value of the output of the industry represented amounts to around EUR 31 billion, about 4 times the turnover of the EU catching sector.

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.

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 2022 data and refers to the EU 27. For 2020 and onwards data statistics from EU27 (EU28 excluding United Kingdom) were used. United Kingdom left the European Union on the 31<sup>st</sup> 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 12,092 thousand tonnes in 2022
- EU domestic supply for consumption reached 3,236 thousand tonnes in 2022
- 8,856 thousand tonnes of seafood for consumption was imported from third countries in 2022
- exports to third countries accounted to 2,241 thousand tonnes in 2022
- total EU consumption (EU domestic supply + Imports – Exports) in 2022 was 9,851 thousand tonnes
- the per capita consumption in 2022 was 22.1 kg
- the minimum EU import dependence rate for 2022 grew to around 67% 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 2022, 75% of this supply came from EU catches (2,914 thousand tonnes) whereas aquaculture production accounted to 974 thousand tonnes. Part of EU catches are intended for non-food uses (fishmeal, fish oil; 652 thousand tonnes), which make the total EU domestic supply for food uses 3,236 thousand tonnes in 2022.

#### 2.2.2 Imports from third countries

Imports from third countries are essential to increase the available fish volumes and fish diversity in the EU. Import activity is high and at 8,856 thousand tonnes, it is almost three times as high as the EU domestic supply in 2022.

#### 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 12,092 thousand tonnes in 2022.

#### EU domestic supply

(3,236 thousand tonnes)



#### EU import

(8,856 thousand tonnes)

#### 2.2.4 Export to third countries

Export activity reached 2,241 thousand tonnes in 2022. Exports represent around 69% 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 9,851 thousand tonnes in 2022. This number is comparable to previous years, the EU situation excluding the UK.

## EU domestic supply

(3,236 thousand tonnes)



## EU import

(8,856 thousand tonnes)



+



-



## EU export

(2,241 thousand tonnes)

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 where 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 27.1 kg and fits within the 10-year bandwidth of 28.0 kg +/- 1.0kg. After adjustment for the export activity the consumption per capita decreased to 22.1 kg (22.4 kg in 2021).

### 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 2022, the total EU supply was 12,092 thousand tonnes for food use products. Adjusting for exports we arrive at a potential net consumption of 9,851 thousand 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, they could represent 32.2% of the total available supply. However, this includes non-food use. It is therefore unrealistic as a measure;
- adjusting for this then in food use terms the EU domestic supply represents 26.8% of the total available supply, assuming everything stays in the EU;
- we then need to further adjust taking into account the exports that represent an important element of fish trade; numbers are then further reduced to 8.2% in terms of consumption.
- Restating the above figures the other way around means that imports represent 73.2% of all available supply and 89.09% of consumption <sup>1</sup>.

The dependence that the EU has on imported materials for its markets has been extremely high, especially after the exit of the UK out of the EU. In 2022, the dependence on imported seafood grew to 67.2% (+1.5%) mainly due to further reduced EU catches mainly due to the increased fuel prices following the Ukraine-Russian war.

2022  
EU import  
dependance  
**67.2%**

Note: The EU import dependence is calculated taking a purely theoretical approach of the most optimistic calculation for import dependence in the EU where it is assumed the exports are retained and displaced by the equivalent amount of imports one-to-one (2,241 thousand tonnes). The level of import dependence gets to 89.9% when all exports are suggested to be EU production seafood.

<sup>1</sup> Assuming only domestically caught fish makes up the export activity

**Table 2.1: Food balance for fish and fishery products**

1,000 tonnes live weight

	EU (28)						EU (27)			
	2014	2015	2016	2017	2018	2019	2020 a)	2021 a)	2022 b)	2023 c)
Catches	5.494	5.260	5.127	5.425	5.337	4.922	3.869	2.987	2.914	2.843
+ Aquaculture production e)	1.236	1.268	1.296	1.370	1.319	1.367	1.088	1.083	974	974
- Non-food uses	960	1.056	858	1.227	1.347	1.331	906	680	652	652
= Supply for consumption	5.770	5.472	5.565	5.568	5.309	4.958	4.051	3.390	3.236	3.165
+ Imports (Third countries) f)	9.124	8.990	9.246	9.306	9.439	9.469	8.913	8.968	8.856	9.033
= Total supply	14.894	14.462	14.811	14.874	14.748	14.427	12.964	12.358	12.092	12.198
- Exports (Third countries) f)	2.293	2.012	1.977	2.121	2.233	2.233	2.494	2.338	2.241	2.129
= Total consumption	12.601	12.450	12.834	12.753	12.515	12.194	10.470	10.020	9.851	10.069
Total supply per capita (kg) g)	29,4	28,4	29,0	29,1	28,8	28,1	29,0	27,6	27,1	27,2
by EU catches in %	30	29	29	28	27	25	23	19	19	18
by EU aquaculture in %	8	9	9	9	9	9	8	9	8	8
by third countries imports in %	61	62	62	63	64	66	69	73	73	74
Consumption per capita (kg) h)	24,9	24,5	25,2	24,9	24,4	23,8	23,4	22,4	22,1	22,5
Self-sufficiency (%) i)	46	44	43	44	42	41	39	34	33	31

Notes: b) Corrected figures.- c) Preliminary figures.- d) Forecast.- e) Estimation for 2021-2023.- f) Without fishmeal (feed) and fishoil, product weight converted into live weight.-

g) Total supply / EU-population \* 1000 = kg/caput/year.- h) Supply for consumption / EU-population \* 1000 = kg/caput/year.-

i) Supply for consumption / Total supply \* 100 = Rate of self-sufficiency in %.-

Source: Eurostat, Eurostat-Comext, EU catch report, EUMOFA, AIPCE-CEP-Estimations and forecasts

Published by: AIPCE 2023

## 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 create more opportunities for consumers to eat more fish, more often and in alternative ways.

In 2022, the demand for seafood remained high despite the high seafood prices for sourcing. Traders and industry faced the high prices to secure their clients with goods.

The year 2022 saw its end with cold stores stocked with expensive seafood, with arrival of cheaper supplies at the beginning of 2023.

In Europe sales started to slow down and customers moved from expensive fish to cheaper species or meat and poultry. The high priced seafood in the cold stores was sold below the cost price or with minimal margins to stay competitive. This had a negative impact on the financial results among most companies in the EU for the year 2023.

The EU traders and industry now feel the lack of supply and the market pressure against sourcing from Russia. Brexit still creates trouble for the trade between UK and the EU. Negotiations between EU and Norway are furthermore not yet settled.

To ensure continued access to opportunities, the industry should not be hampered by unnecessary burdens of tariff and non-tariff barriers. Therefore it is of importance to secure the industry need for raw material via the ATQ system without duty. Duty increases prices for the consumer and in consequence the sales continue to decrease. The threat is that the production will move from the EU to third countries.

## 3 Regulatory review

### 3.1 Autonomous Tariff Quotas (ATQs)

One of the key messages from the Finfish Study is the industry's dependence on imports. The Autonomous Tariff Quotas (ATQs) are specifically designed to permit the EU industry access to its raw material in a way that stimulates growth, employment and investment.

At the beginning of 2021, the latest cycle of ATQs entered into force (Council Regulation (EU) 2020/1706). This latest cycle is triennial and covers the years 2021-2023. New species introduced in the new cycle were whole frozen flatfish (7.500 tons at 0 % duty), whole fresh trout (10.000 tons at 5 % duty) and whole, fillets and flaps of chub mackerel (5,000 tons at 7.5 % duty).

In July 2021 Council Regulation (EU) 2021/1203 amending the Council Regulation (EU) 2020/1706, new ATQs were introduced to compensate for the loss of tariff reduction of the British Overseas Countries and Territories (OCTs) because of Brexit, and the loss of duty-free fishery products from Iceland and Norway since 13 quotas within the European Economic Area additional protocols expired on 30 April 2021. To ensure an adequate supply to the EU processing industry, in the amending Council Regulation (EU) 2021/1203 import duties were 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. 5 of these quotas were set to expire during 2022, however in Regulation 2022/2057 they were prolonged to cover the full cycle until end 2023.

The strength of ATQs is that all 3<sup>rd</sup> countries have access on equal terms (*erga omnes*). Third country supply of the products needed by the EU processing industry is not always guaranteed from specific sources (e.g. due to changes in quotas), which requires flexibility to source from alternative resources. Also, the EU Free Trade Agreements do not cover important 3<sup>rd</sup> countries. ATQs allow for switching simply and smoothly between all 3<sup>rd</sup> countries without losing the right to preferential tariffs.

The European Commission sent its proposal for ATQs for 2024-2025 to the Council in August 2023 for decision. The 2-year term reflects the time deemed necessary to define sustainability criteria for the import of fishery products to the Union from 2026. The proposed ATQ Regulation omits 7 quotas compared to the current ATQ Regulation (including herring) while no new species, products or operations have been introduced. Also, no quota volumes have been increased. The industry's reasoned requests and needs for the coming cycle are not reflected in the proposal. Russia and Belarus are to be excluded from the ATQ regulation. The proposal as it stands now will severely restrict the EU fish industry's potential for growth and employment. It is now to be negotiated and will be adopted by the Council to enter into force on January 1<sup>st</sup>, 2024.

### 3.2 Trade agreements

#### 3.2.1 TCA Agreement UK

Following the UK's departure from the EU, bilateral trade has been subject to the terms of a new Trade and Cooperation Agreement (TCA) which took effect in January 2021. This provides for tariff and quota free market access in both directions, subject to Rules of Origin which define qualifying products. Consignments must also meet normal third country certification and Customs requirements for border control purposes. While UK exports to the EU have been subject to these additional checks since the TCA came into operation, the UK has delayed the introduction of reciprocal checks on imports from the EU. These are now expected to be phased in over the next 5-14 months, starting from the end of January 2024. In addition, new arrangements have been drawn up for trade between Great Britain and Northern Ireland under the Windsor Framework, which modifies the provisions of the original Northern Ireland Protocol which was signed in conjunction with the UK-EU Withdrawal Agreement. These are also due to begin from October 2023.

In parallel with these changes, additional administrative burdens have arisen from the need to provide IUU (Illegal, Unreported and Unregulated) storage, catch and processing certificates, previously required for third country trade only but now applicable to bilateral trade in both directions.

In addition, the UK has introduced additional tariffs for fishery products of Russian origin as part of its sanctions regime in response to Russia's illegal invasion of Ukraine.

Assessing the impact of these various measures on trade flows has been further complicated by the effects of the Covid pandemic, both in terms of the various supply chain and market disruptions which took place and their

related consequences for consumer demand. Profitability will also have been affected by a range of additional costs related to Brexit, Covid and the situation in Ukraine, including energy costs.

It is therefore difficult to draw conclusions on the respective contributions of these various factors to the current situation.

The TCA itself, including provisions relating to fisheries, is due for review in 2026.

### 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: Revising quotas within the Financial Mechanism EU - Norway/Iceland for 2021-2028

13 tariff quotas providing for duty-free import of fish and crustaceans into the EU expired April 30th, 2021, and still today 2½ years later awaits renewal within the Additional Protocol of the EEA Agreement between EU and Norway/Iceland - subject to the so-called Financial Mechanism. As for quotas covering products providing input for value adding in the EU seafood processing industry, including spiced herring in brine, the EU Commission has adopted compensatory, temporary measures in the form of Autonomous Tariff Quotas (ATQ's) so far covering until end of 2023. A further extension of these into 2024 may be needed while the renegotiation of the Additional Protocol has proven especially difficult and lengthy in the current round. The need for a "roll-over" clause in the EEA Agreement is evident to ensure steady and predictable supply conditions for fish and fishery products from the Northeast Atlantic providing for a significant supply to the EU market.

## 3.4 IUU and CATCH

In respect to the IUU regulation the European Commission continues to use the 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 July 2023 four 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;



- Cameroon since February 2023.

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

The following countries received a “yellow card” since 2020:

- Cameroon in February 2021;
- Ghana in June 2021.

The following countries saw their “yellow card” removed since 2020:

- Kiribati in December 2020, which had been in place since April 2016.

The total number of countries having a yellow card accounts to 8 (Ecuador, Ghana, Liberia, Panama, Sierra Leone, St. Kitts and Nevis, Trinidad and Tobago and Vietnam).

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 Russian war on Ukraine

The Russian aggression on Ukraine on February 24th 2022 and the subsequent cut in Russian gas supplies strongly increased energy prices in the EU region and a cascading effect fueled further cost increases also on all other inputs for the EU seafood producers – including higher prices of fish supplies caused by increased fuel prices - rendering a higher part of EU normal fishing activity unprofitable and vessels stayed ashore. The higher cost-prices of seafood end products hit the EU consumer who, at the same time, had to cope with lower purchasing power due to general price inflation and higher interest rates. The EU consumer reacted by switching to lower priced fish and fishery products, or by opting for other cheaper protein sources. This predictable consumer reaction conflicts with the EU Green Deal aiming for more affordable, nutritious food and also for a general transition to more sustainable protein sources. Later in 2022, energy prices dropped sharply, but left the EU area with a higher longer-term ‘basic’ inflationary trend. This poses a threat to the average EU consumers’ affordability of seafood as part of the normal diet.

On October 6th 2022, as a response to the conflict, the EU imposed an import ban on Russian caviar and caviar substitutes (CN 16043100 and 16043200) and on crustaceans within CN Chapter 0306. These bans are enforced in the EU following the ‘non-preferential’ rules of origin. The UK has imposed an additional tariff of 35% on all Russian fish and fishery products to the UK. The US is considering whether to extend its ban so to also include Russian fish reprocessed in China. Significant amounts of Russian cod and Alaska pollock to the EU continue to be imported although there are some signs of pressure building up in the market to end import and sales of fish with Russian origin.

Russian illegal actions have caused other supply chain disruptions including a shortage of sun-flower-oil supplies to the EU seafood industry; a block on exports of seafood products to the Ukrainian market (although now slowly regaining at least some of its pre-war strength). Also, soon after the war broke out the (re)processing of species like cod and salmon in the Ukrainian seafood industry stopped and a process of reconstruction of the former processing capacity is ongoing despite the obvious risks due to continued Russian military attacks. Export of fish and fishery products from the EU to Russia was banned by Russia for all unprocessed seafood products already in 2014 following the Crimea annexation and shortly after February 24th 2022 the export to Russia was brought to an end for the remaining seafood product categories.

## 5 Product category

### 5.1 General

Since 1992, the Finfish study focused 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 apparent demand of whitefish of EU-27 is high with 2,504 thousand tonnes for wild capture species in 2022 (-2.7%; -69 thousand tonnes). These species represent cod, Alaska pollock, hake, haddock, saithe, redfish & hoki. Increased global competition on procurement and a drop in some of the important whitefish quotas put pressure on the whitefish supply in future.

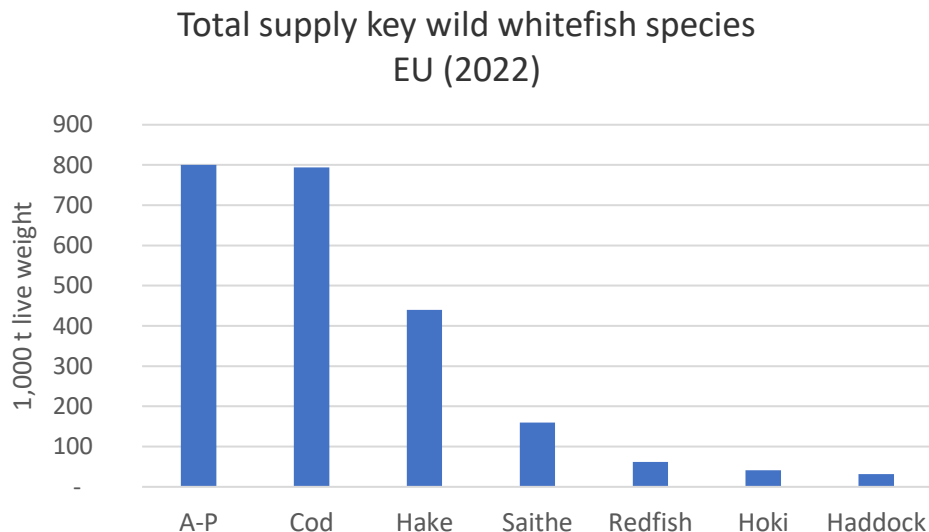


Figure 5.1: Total volumes utilized in the EU of key wild captured whitefish species in 2022; Source: Eurostat/Comext

Whitefish species are of great importance in the supply of the EU market, due to the scale of the tonnages involved, and also the high added value provided by the processing of these species by the EU processing industry. Most of the whitefish is imported from outside the EU borders, around 93% in 2022 (2,328 thousand tonnes). Alaska Pollock and Cod are the most important whitefish species in the EU supply, accounting to 800 thousand tonnes and 794 thousand tonnes in 2022 respectively. Species like Alaska pollock and hoki are fully dependent on imports from outside the EU (figure 5.2).

### Import dependency key wild whitefish species EU (2022)

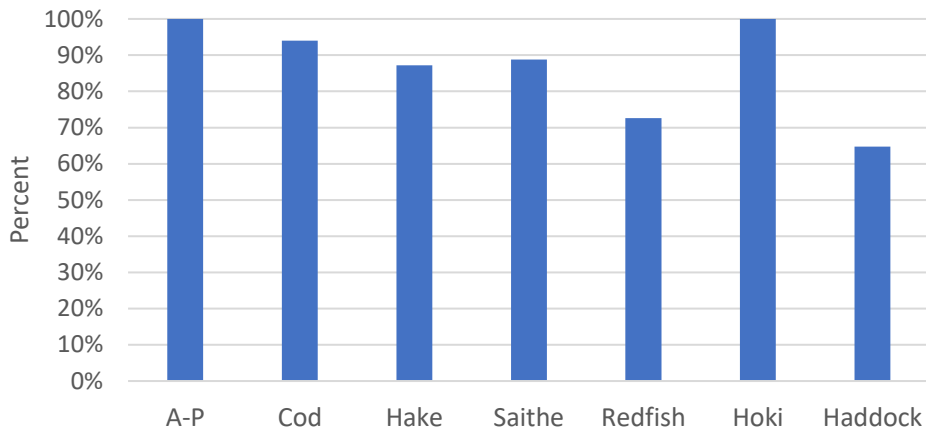


Figure 5.2: Import dependency EU for key wild captured whitefish species in 2022; Source: Eurostat/Comext

Supply from EU catches of species under quota management show a decreasing trend for many years. The total landings volume of whitefish decreased by 1/3<sup>rd</sup> between 2020 (beginning of EU27) and 2022. Compared to 2021 the total landing volume of whitefish amounted to 176 thousand tonnes, an increase of 5% compared to 2021 (+8 thousand tonnes). Especially cod (+10 thousand tonnes; +24%) and haddock (+2 thousand tonnes; +12%) catches increased in 2022. Saithe (-0.5 thousand tonnes; -3%) and hake (-2 thousand tonnes; -3%) were caught in lower quantities.

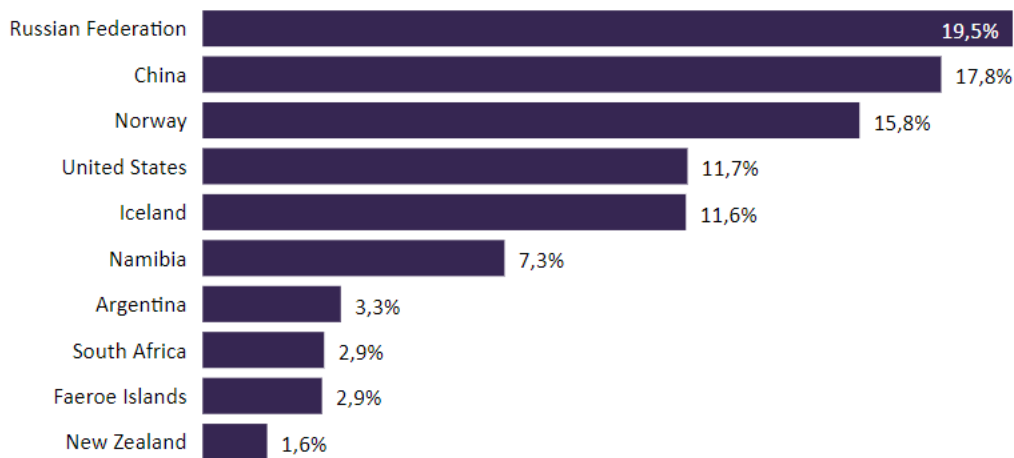


Figure 5.3: External sourcing countries for key wild captured whitefish species in 2022 in percentage of total import (2,328 thousand tonnes); Source: Eurostat/Comext

The most important external sourcing countries in 2022 were Russia (454 thousand tonnes; +24%), China (414 thousand tonnes; -2%), Norway (369 thousand tonnes; -5%), USA (272 thousand tonnes; -28%) and Iceland (271 thousand tonnes; -12%) (figure 5.3). USA share of EU imports of whitefish has dropped to 11.7% due to a reduced import of Alaska Pollock from this country in 2022 (-35 thousand tonnes). Almost all whitefish import from China and USA are frozen fillets (especially Alaska Pollock). The sourcing from China would also cover fish from other origin and reprocessed and dispatched from China to EU.

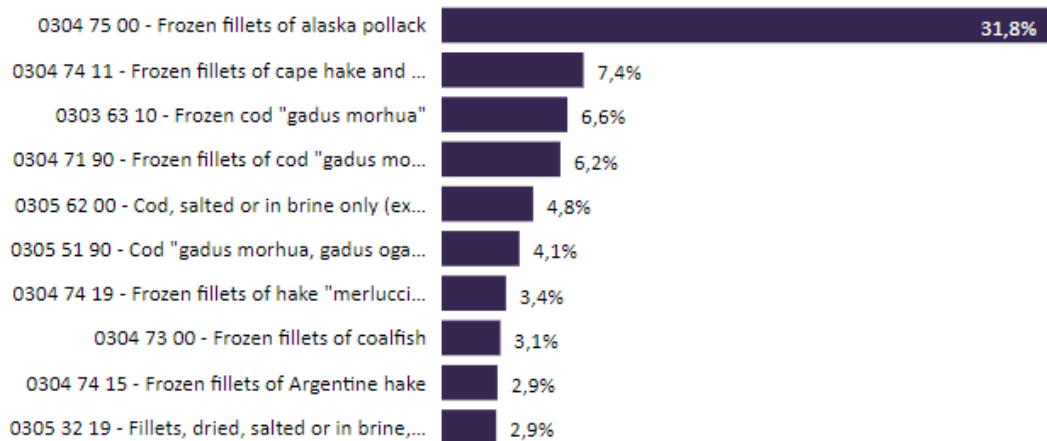


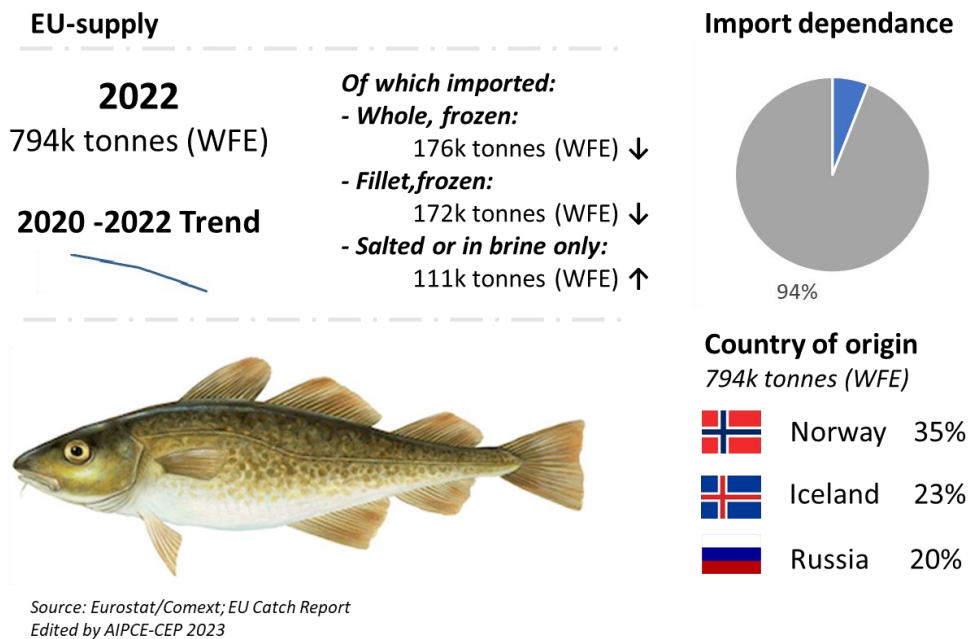
Figure 5.4: Main imported products of wild captured whitefish species in 2022 in percentage of total import (2,328 thousand tonnes); Source: Eurostat/Comext

From all imported wild captured whitefish species in 2022, 31.8% (742 thousand tonnes) consisted of frozen Alaska Pollock fillets coming from China (38.7%; 287 thousand tonnes), Russia (33.6%; 249 thousand tonnes) and USA (25.6%; 190 thousand tonnes) (figure 5.4). 7.4% (173 thousand tonnes) of the total whitefish imports were frozen cape hake fillets from Namibia (72.5%; 125 thousand tonnes) and South Africa (27.4%; 47 thousand tonnes). Whole frozen cod was with 6.6% the third most important imported whitefish product imported from Russia (53.5%; 82 thousand tonnes), Norway (28.3%; 43 thousand tonnes) and Greenland (15.5%; 24 thousand tonnes).

*“Whitefish species are of great importance in the supply of the EU market, due to the scale of the tonnages involved, and also the high level of added value provided by the processing of these species by the EU processing industry”*

Whitefish species are well established in the EU and consumers are familiar with them. Continued access to global whitefish fisheries without unnecessary barriers is 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.

## Cod



Most of the landed Atlantic cod worldwide comes from the Barents Sea. Fishing quotas in the Barents Sea decreased in 2022 (-20% to 708,480 tonnes), which is important for the EU cod supply. For 2023 and 2024 similar cuts are expected (-20% for both 2023 and 2024).

The mid-Atlantic region around Iceland is another important source for Atlantic cod. Cod quota in this area was cut by 6% in 2022-2023 to 208.846 tonnes. This area showed decreasing quota since 2019-2020 (23% reduction).

Pacific cod are mainly caught by USA/Canada, Russia, Japan and Korea. Bering Sea Pacific cod quota decreased to 127 thousand tonnes in 2023, -7% lower than the Pacific cod TAC in 2022.

In 2022 the total EU-27 cod supply decreased by 5 percent to 794 thousand tonnes (-47 thousand tonnes). EU cod fisheries represented 6% of this supply, 51 thousand tonnes (+10 thousand tonnes). The other 794 thousand tonnes of cod products were imported from third countries, especially from Norway (35%), Iceland (23%) and Russia (20%). Where the biggest share (37%) of cod from Norway consists of salted/dried cod (103 thousand tonnes), Icelandic Cod is mainly imported fresh (29%; 52 thousand tonnes) or in frozen fillets/blocks (22%; 41 thousand tonnes), and Russian cod mainly frozen raw, simply headed and gutted (64%; 100 thousand tonnes).

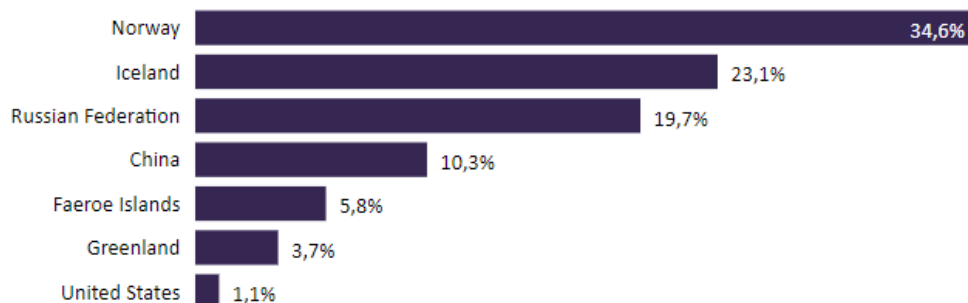


Figure 5.2.2.1: External sourcing countries for key wild captured cod in 2022 in percentage (>1%) of total import (794 thousand tonnes); Source: Eurostat/Comext

Cod enters the EU mainly via the Netherlands, Denmark and Sweden. Most of the cod imports in 2022 consisted of frozen whole cod (22%), frozen fillets (22%) and salted/brined cod (14%). Cod is re-exported within the EU - either processed or not – especially to France, Portugal and Spain. A total overview of imports per HS-code are mentioned in the figure below.

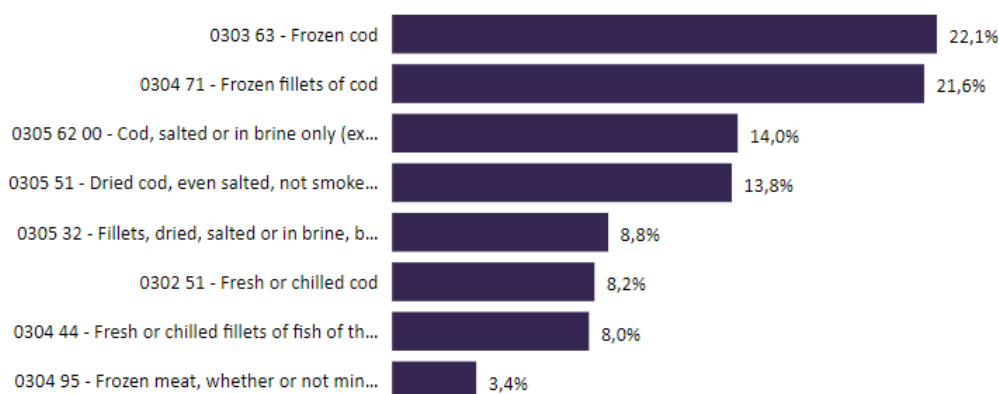


Figure 5.2.2.2: Main imported products of wild captured cod in 2022 in percentage of total import (794 thousand tonnes);  
Source: Eurostat/Comext

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 2022. Another ATQ for cod is salted cod for processing (09.2765) with a 2,000 tonnes duty free import allowance in 2022. All quotas are there to stimulate growth, employment, and investment in EU fish processing industry.

Cod raw materials are of high importance for the EU processing industry. Restrictions on ATQs for this product category will have a negative impact on the adding value to it in the EU.

It is obvious that for the future supply of cod in the EU, imports from third countries are vital to secure the high quantity of cod for consumption in Europe. Firstly, EU fishing quotas should be utilized by EU fisheries at their maximum sustainable yield. But reduced fishing quotas for some important cod stocks and the increased complexity in global trade asks for the right measures from the EU Commission to make import as simple as possible.

## Saithe

### EU-supply

**2022**  
180k tonnes (WFE)

### 2020 -2022 Trend



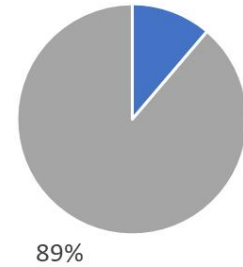
### Of which imported:

- **Fillet,frozen:** 72k tonnes (WFE) ↓
- **Whole,frozen:** 34k tonnes (WFE) ↑
- **Whole,fresh:** 31k tonnes (WFE) ↓



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

### Import dependence



### Country of origin

160k tonnes (WFE)

-  Norway 41%
-  Iceland 33%
-  Faroer 12%

Most of the wild caught saithe comes from the Barents Sea, but also the North East Atlantic region (FAO27) around EU, Iceland, Faroes and Norway is an important area. That's why both EU catches and imports contribute importantly to the saithe supply in the EU.

In 2022 the saithe supply increased to around 180 thousand tonnes (+6% compared to 2021), where 11% of the supply came from EU fisheries (20 thousand tonnes in 2022). The volumes from EU-fisheries stabilized after a huge drop in 2021 (-46%). The other 160 thousand tonnes of saithe are imported from third countries (89% of total supply).

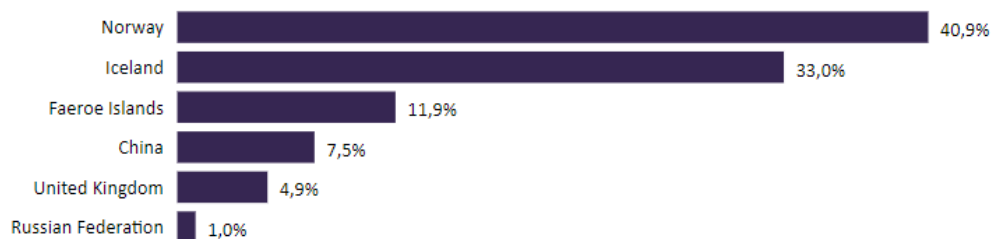


Figure 5.2.3.1: External sourcing countries for key wild captured saithe in 2022 in percentage (>1% of total import (160 thousand tonnes); Source: Eurostat/Comext

Most important sourcing countries for saithe in 2022 were Norway (41%), Iceland (33%) and Faroes Islands (12%). 45% of the EU saithe imports consisted of frozen fillets, followed by whole frozen coalfish (25%) and fresh whole saithe (20%). The products enter the EU mainly via the Netherlands, Denmark, Sweden and Poland, while the main processing and consumption markets are France, Poland, Germany and Denmark.



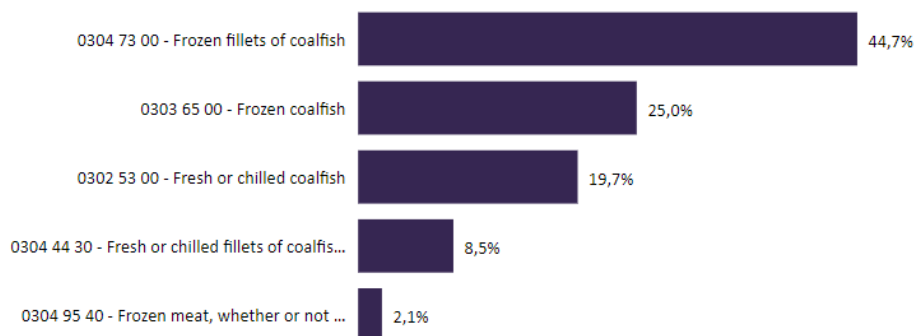


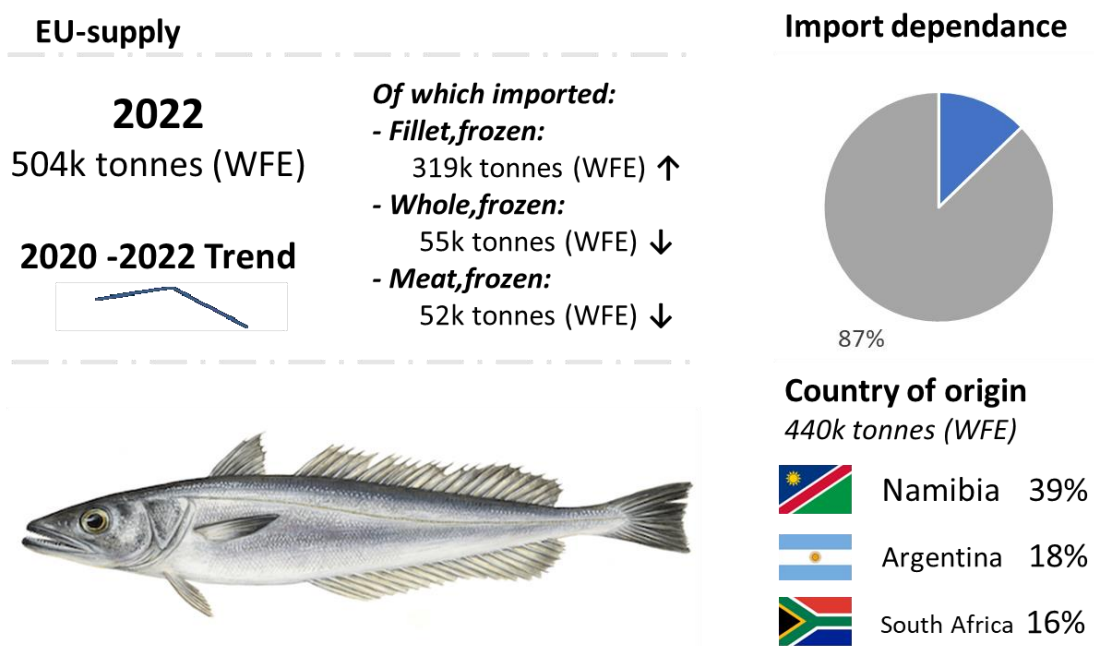
Figure 5.2.3.2: Main imported products of wild captured saithe in 2022 in percentage of total import (160 thousand tonnes); Source: Eurostat/Comext

A small quantity of saithe is exported outside the EU, especially to China (re-export), Brazil and Norway (total of 14 thousand tonnes in 2022).

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

## 5.2.4 Hake

### Hake



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

EU hake supply decreased to 504 thousand tonnes in 2021 (-14 thousand tonnes; -3%). 87% of this supply is imported from third countries, mainly Namibia (39%), Argentina (18%) and South Africa (16%) for the 440 thousand tonnes of imported hake.

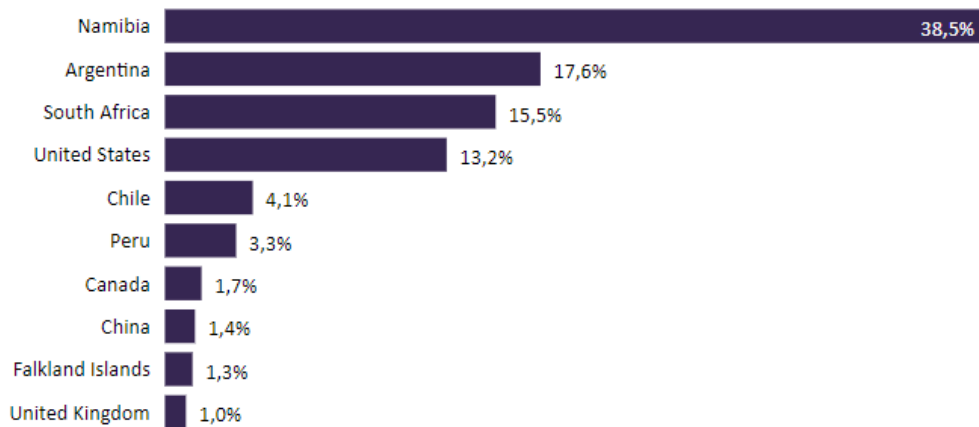


Figure 5.2.4.1: External sourcing countries for key wild captured hake in 2022 in percentage (>1%) of total import (440 thousand tonnes); Source: Eurostat/Comext

EU catches accounted for 64 thousand tonnes in 2022, corresponding with an utilisation of 67% of the EU available fishing quota for hake.

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 quotas 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 62% used at the first of September 2023 (88% used in 2022).

39% of the 2022 hake imports consisted of frozen cape hake or deep water hake fillets, followed by frozen *Merluccius* spp. Hake fillets (18%) and frozen Argentine hake fillets (16%).

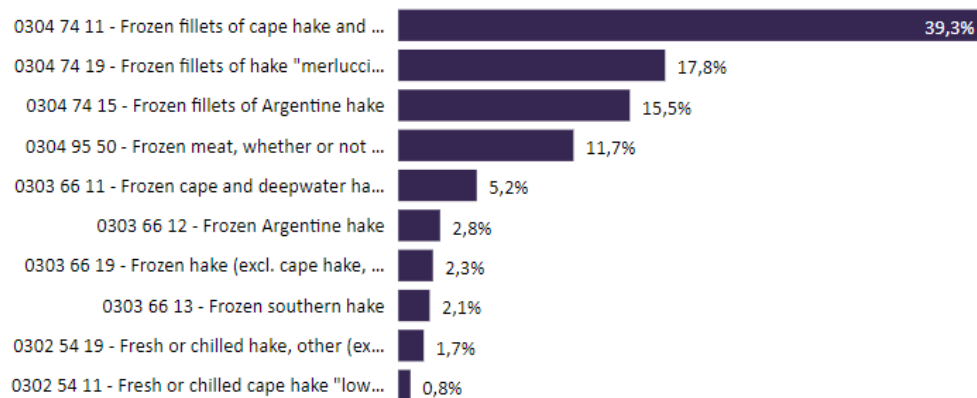


Figure 5.2.4.2: Main imported products of wild captured hake in 2022 in percentage of total import (440 thousand tonnes); Source: Eurostat/Comext

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

## Alaska Pollock

### EU-supply

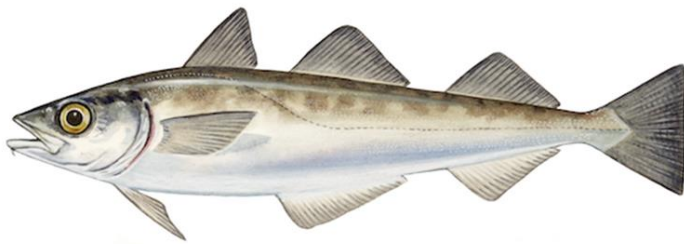
**2022**  
800k tonnes (WFE)

### 2020 -2022 Trend



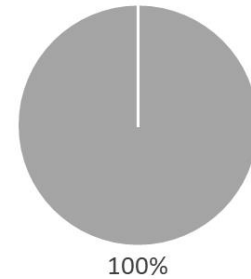
### Of which imported:

- **Fillet,frozen:** 742k tonnes (WFE) ↓
- **Meat,frozen:** 51k tonnes (WFE) ↑
- **Whole,frozen:** 6k tonnes (WFE) ↑



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

### Import dependence



### Country of origin

800k tonnes (WFE)

	China	37%
	Russia	35%
	USA	26%

The total Alaska Pollock fishing quota for 2023 increased to 3,3 million tonnes, of which 2,1 million tonnes were allocated to the Russian Federation and 1,3 million tonnes to the United States.

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 800 thousand tonnes in 2022, a decrease of 2 percent compared to 2021 (-14 thousand tonnes).

The EU represents a significant and key market for both USA and Russian Alaska pollock. The most important sourcing countries for Alaska pollock in 2022 were China (37%), Russia (35%) and USA (26%). Important to know is that over 95% of the Alaska pollock imported from China has a Russian origin. USA import share decreased drastically in 2022 (from 39% to 26%) the USA gives priority to sell their Alaska Pollock on their domestic market and Russian imports are banned.



Figure 5.2.5.1: External sourcing countries for key wild captured Alaska pollock in 2022 in percentage (>1%) of total import (800 thousand tonnes); Source: Eurostat/Comext

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 45% used at the beginning of September 2023 (79% utilisation in 2022).

93% of the Alaska pollock imports in 2022 consisted of frozen fillets, followed by frozen Alaska pollock meat (6%).

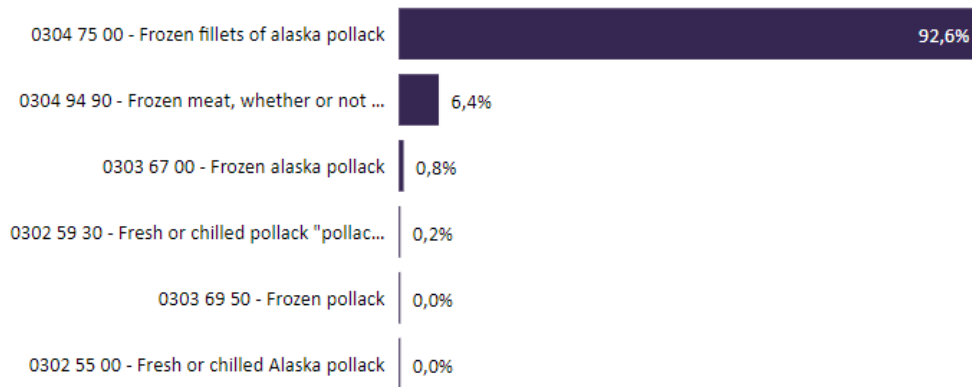


Figure 5.2.5.2: Main imported products of wild captured Alaska pollock in 2022 in percentage of total import (800 thousand tonnes); Source: Eurostat/Comext

Germany (50%) is the main importer of Alaska Pollock, followed by France (15%), the Netherlands (14%) and Poland (10%). Alaska pollock is also an important source of frozen surimi. Import volumes of frozen surimi are not mentioned in this chapter and are studied separately.

Alaska Pollock raw materials are of high importance for the EU processing industry. Restrictions on ATQs for this product category will have a negative impact on the adding value to it in the EU.

Only a small amount of Alaska Pollock is re-exported outside the EU, especially to the surrounding European countries like Switzerland, UK and Norway.

## 5.2.6 Haddock

# Haddock

### EU-supply

**2022**

49k tonnes (WFE)

**2020 -2022 Trend**



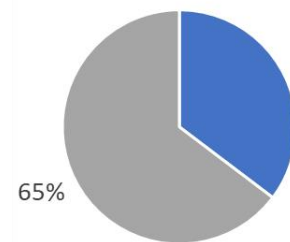
**Of which imported:**

- **Whole, frozen:**  
12k tonnes (WFE) ↑

- **Fillet, frozen:**  
10k tonnes (WFE) ↑

- **Whole, fresh:**  
8k tonnes (WFE) ↓


### Import dependance



### Country of origin

32k tonnes (WFE)

 Norway 37%

 Russia 33%

 Iceland 13%



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

Most of the EU haddock supply comes from the Barents Sea. In 2023 Barents Sea fishing quota decreased to 170 thousand tonnes for 2024 a 25% decrease is recommended (to 128 thousand tonnes) due to lower stock biomass estimates.

The EU fleet landed 17 thousand tonnes of haddock in 2022, 60% of the available fishing quota. EU self-sufficiency was 35% in 2022.

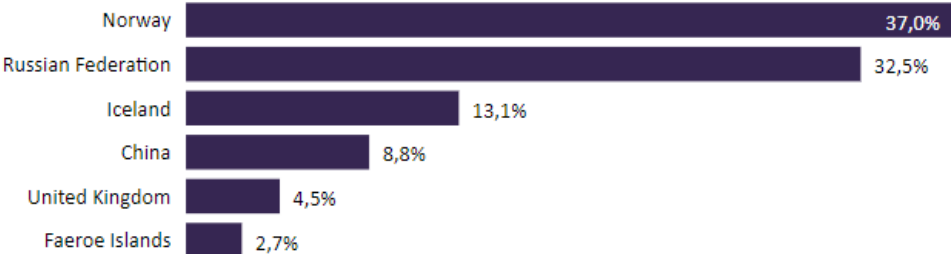


Figure 5.2.6.1: External sourcing countries for key wild captured haddock in 2022 in percentage (>1%) of total import (32 thousand tonnes); Source: Eurostat/Comext

The most important procurement countries for haddock in 2022 were Norway (37%), Russia (33%) and Iceland (13%).

38% of the haddock imports in 2022 consisted of frozen whole haddock, followed by a 32% of frozen haddock fillets and 30% of whole fresh haddock.

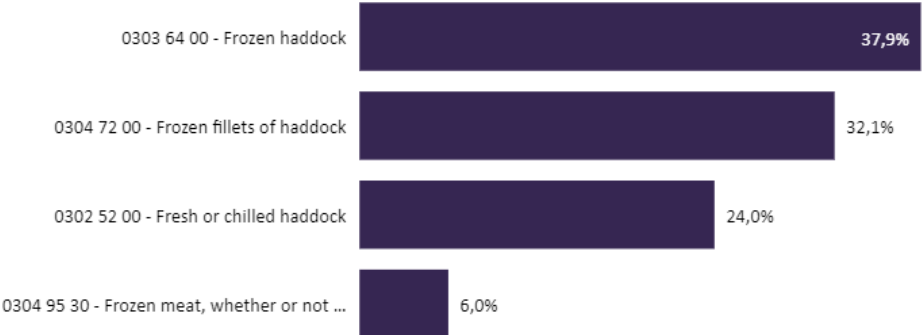


Figure 5.2.6.2: Main imported products of wild captured haddock in 2022 in percentage of total import (32 thousand tonnes); Source: Eurostat/Comext

Most of the haddock is imported via the Netherlands, Poland, Denmark or Sweden.

There is a modest ATQ for haddock available for EU industry : 3,500 tonnes of H&G haddock at 0% duty (09.2824). At the first of September 2023 87% of this quota was utilised (fully used at the end of October 2022). It is questionable if the amount of 3,500 tonnes is high enough for covering the industry demand when growth is factored in.

## Redfish

### EU-supply

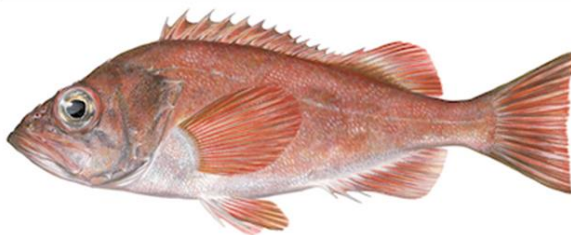
**2022**  
85k tonnes (WFE)

### 2020 -2022 Trend



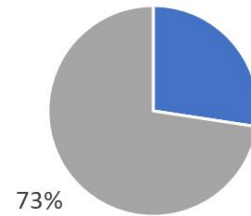
### Of which imported:

- **Whole,frozen:** 20k tonnes (WFE) ↓
- **Fillet,frozen:** 18k tonnes (WFE) ↑
- **Whole,fresh:** 17k tonnes (WFE) ↓



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

### Import dependence



### Country of origin

62k tonnes (WFE)

	Iceland	50%
	Norway	21%
	China	20%

In 2022 EU supply of redfish was around 85 thousand tonnes, a decrease of 5% with supply in 2021 (89 thousand tonnes). Around a quarter (23 thousand tonnes) of this supply came from the EU fishing fleet. The other three fourths of redfish (73 thousand tonnes) were imported, mainly from Iceland (50%), Norway (21%) and China (20%).

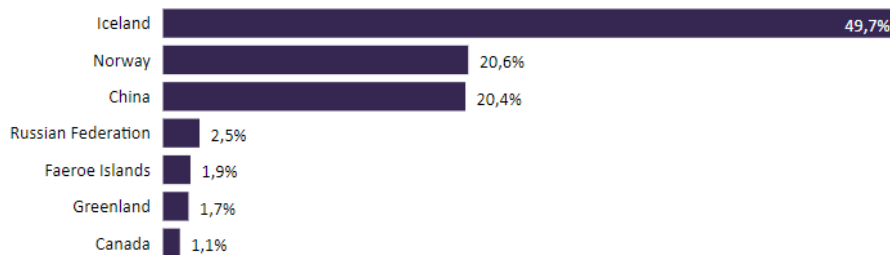


Figure 5.2.6.1: External sourcing countries for key wild captured redfish in 2022 in percentage (>1%) of total import (62 thousand tonnes); Source: Eurostat/Comext

Redfish are imported into the EU via the Netherlands, Denmark, Germany and Spain. 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 20 thousand tonnes in 2022) from both third country import and domestic production were exported to third countries like Korea, Canada and China.

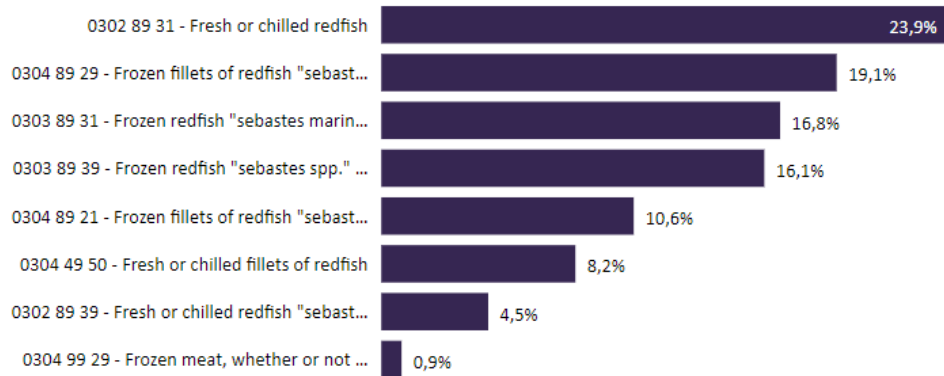


Figure 5.2.6.2: Main imported products of wild captured redfish in 2022 in percentage of total import (62 thousand tonnes); Source: Eurostat/Comext

Almost all the supplying countries for redfish are EFTA Members States. 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. For the period from 1st of November 2022 to the 31st of December 2023, the ATQ for redfish fillets is 1,520 thousand tonnes.

Fresh whole ‘Sebastes marinus’ redfish is responsible for 24% of the redfish import, followed by frozen ‘Sebastes marinus’ redfish fillets (19% of the redfish imports) and frozen fillets of other Sebastes spp. species (17% of the redfish imports).

## 5.2.8 Hoki

### Hoki

#### EU-supply

**2022**  
41k tonnes (WFE)

#### 2020 -2022 Trend

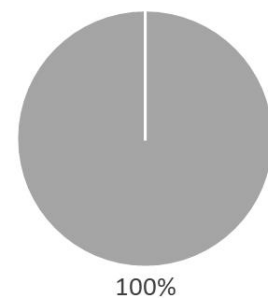


**Of which imported:**  
- Fillet, frozen:  
41k tonnes (WFE) ↑



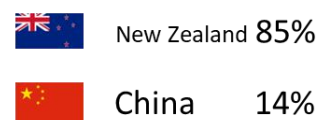
Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

#### Import dependence



#### Country of origin

41k tonnes (WFE)



In 2022 hoki EU supply decreased to 41 thousand tonnes, -4 thousand tonnes compared to the year before (-9%). There is no EU catch for hoki so EU is 100% import dependent.

The most important procurement country for hoki is New Zealand. In 2021 85% of all EU import came from this country. Import from China reached 14%.



Figure 5.2.6.1: External sourcing countries for key wild captured hoki in 2022 in percentage (>1% of total import (41 thousand tonnes); Source: Eurostat/Comext

There is an ATQ allowance available for hoki, under the form of frozen hoki fillets and meat for processing (09.2761) with a limit of 17,500 tonnes duty free import allowance.

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

### Plaice

**EU-supply**

**2022**  
37k tonnes (WFE)

**2020 -2022 Trend**

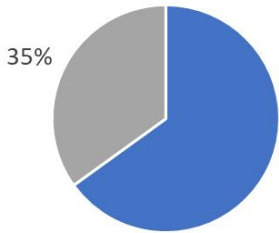
*Of which imported:*

- **Whole, fresh:** 11k tonnes (WFE) ↑
- **Whole, frozen:** 2k tonnes (WFE) ↓



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

**Import dependance**



**Country of origin**

13k tonnes (WFE)

	UK	40%
	Iceland	36%
	Russia	17%

European plaice (*Pleuronectes platessa*) is an important species in European waters that has been exploited for centuries. Most of the European plaice is caught in the greater North Sea area (ICES area III<sup>ab</sup>, IV<sup>abc</sup>, VII<sup>de</sup>).

European plaice processing finds place in especially Northern European countries with the village Urk (Netherlands) as flatfish hub. However, decreasing landing volumes put this industry under pressure.

The EU plaice supply shows a decreasing trend for many years. Despite a very high fishing quota for plaice the utilisation is low. EU catches decreased by 31 percent in 2022 compared to 2021, to 24 thousand tonnes. Compared to 2020, the EU production decreased by 50%.



EU policy does not help to improve the fishing quota utilization and secure domestic food production. The wish for an increased amount of Marine Protected Areas (MPA) and windmill parks decrease fishing areas (and thereby the perspective) for the EU fishing fleet.

Increased fuel prices due to the Ukraine-Russia war on the other hand does not make it beneficial for an important part of the fleet to go out of the port and fish. In the Netherlands

The lack of perspective in EU fishing policy and increased production costs have realised that a maximum of 54 cutters will be decommissioned and thereby a further decrease in domestic plaice production and fishing quota utilisation are expected.

To fulfil the EU market demand for flatfish, like European plaice, solutions should be found to optimize the EU fishing quota utilisation on the one hand and to stimulate third country imports on the other hand. Lack of raw materials will make market perspectives worse.

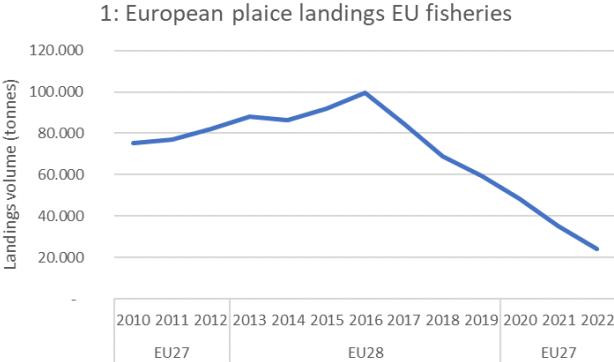


Figure 5.2.9.1: EU European plaice landings, year 2010-2022

The EU self-sufficiency for plaice is high, but decreasing. In 2022 65% of all plaice came from EU fisheries (72% in 2021). The import dependency increased compared with previous years. Beside decreased EU landings volumes the exit of the UK is another important reason for this. Plaice from UK flagged vessels landed into EU harbours are now seen as third country imports. Import volume decreased to 13 thousand tonnes in 2022 (14 thousand tonnes in 2021). UK is the main source of European Plaice imports to the EU, with 5.2 thousand tonnes in 2022 (40% of total), followed by Iceland (36% of total) and Russia (17% of total).

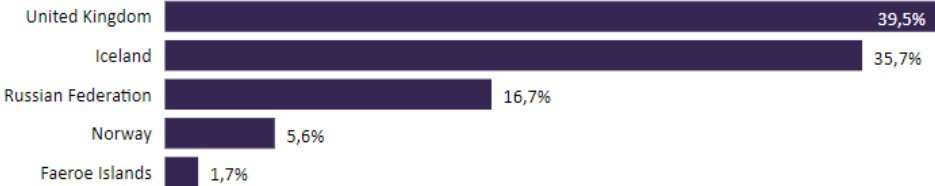


Figure 5.2.9.2: External sourcing countries for plaice in 2022 in percentage (>1%) of total import (13 thousand tonnes); Source: Eurostat/Comext

There are ATQ allowances for flatfish fillets (09.2778) and whole flatfish (09.2503) available for EU industry. The flatfish imported via these ATQs are not European plaice but additional or complementary flatfish species. The ATQ allowance for flatfish fillets 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 (November 2022).

The new introduced ATQ for whole frozen flatfish (7,500 tonnes) is not fully utilized yet, but utilisation is growing fast. It is a new quota that have found the way to the processing industry, especially in Urk (Netherlands) to fill the loss of plaice processing. Quota use increased during the years and ended in 2022 with a quota use of 69 percent. This uptake will increase and this ATQ expected to be insufficient in the coming years if domestic production of European plaice stays low.

Fresh whole plaice are responsible for 81% of the European plaice imports, followed by frozen whole plaice (18%).

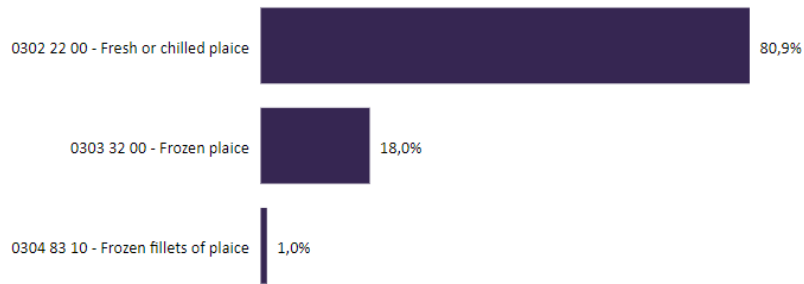


Figure 5.2.9.3: Main imported products of plaice in 2022 in percentage of total import (13 thousand tonnes); Source: Eurostat/Comext

To fulfil consumer demand and keep the flatfish market sustainable energy need to be put in getting the raw materials for EU industry. This should be done two sided. Effort should be made on optimizing the fishing quota utilisation for European plaice and third country imports should be stimulated. It is up to the Commission and industry to find the right way how to keep European plaice and flatfish as a healthy product in the EU seafood market and contribute to food security.

### 5.3 Other fish species

#### 5.3.1 Salmon

## Salmon (all species)

### EU-supply

**2022**  
1,390k tonnes (WFE)

### 2020 -2022 Trend



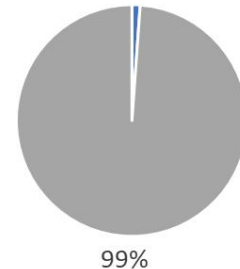
### Of which imported:

- **Whole, fresh:**  
1,031k tonnes (WFE) ↑
- **Fillet, frozen:**  
170k tonnes (WFE) ↓
- **Fillet, fresh:**  
149k tonnes (WFE) ↑



Source: Eurostat/Comext; EU Catch Report; FEAP  
Edited by AIPCE-CEP 2023

### Import dependence



### Country of origin

1,374k tonnes (WFE)

-  Norway 79%
-  UK 5%
-  Faroe 5%

Salmon is the most consumed seafood species in the EU. From all salmon species, Atlantic salmon is the most important one. The total EU salmon supply decreased to 1,390 thousand tonnes in 2022 (-2%; -25 thousand tonnes). Since the UK – an important producer of Atlantic salmon - left the EU almost all salmon comes from outside the EU-27 (99%).



Figure 5.3.1.1: External sourcing countries for salmon in 2022 in percentage (>1%) of total import (1,374 thousand tonnes); Source: Eurostat/Comext

An increasing amount of salmon is imported as raw material for processing in the EU-27. Most of the raw materials come from EFTA Member states, like Norway, Iceland and Faeroe Islands. Especially imports from Norway are of high importance, accounting for 79% of total salmon supply in 2022 (and 88% of the total whole fresh salmon supply in 2022). Norwegian salmon creates more jobs in the EU than it does in Norway. The import of 1,081 tonnes of Norwegian salmon to the EU-27 generates thousands of direct jobs for the EU seafood processing industry.

Fresh whole salmon is responsible for 72% of the total salmon imports, followed by frozen salmon fillets (13%) and fresh salmon fillets (12%).

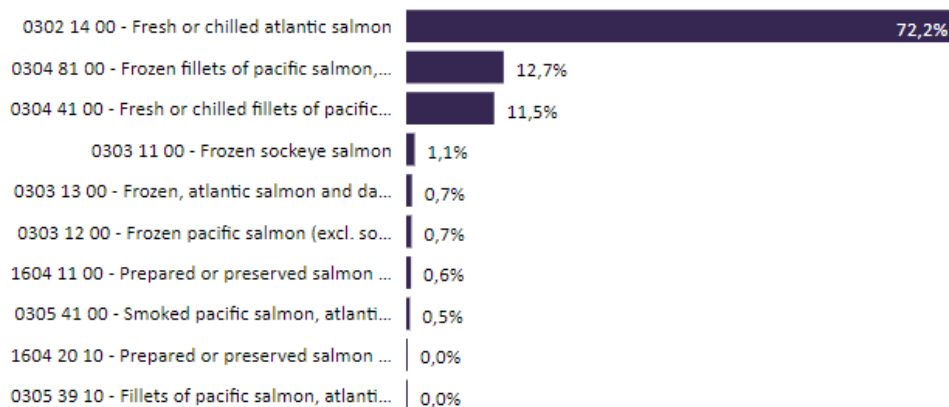


Figure 5.3.1.2: Main imported products of salmon in 2022 in percentage of total import (1,374 thousand tonnes); Source: Eurostat/Comext

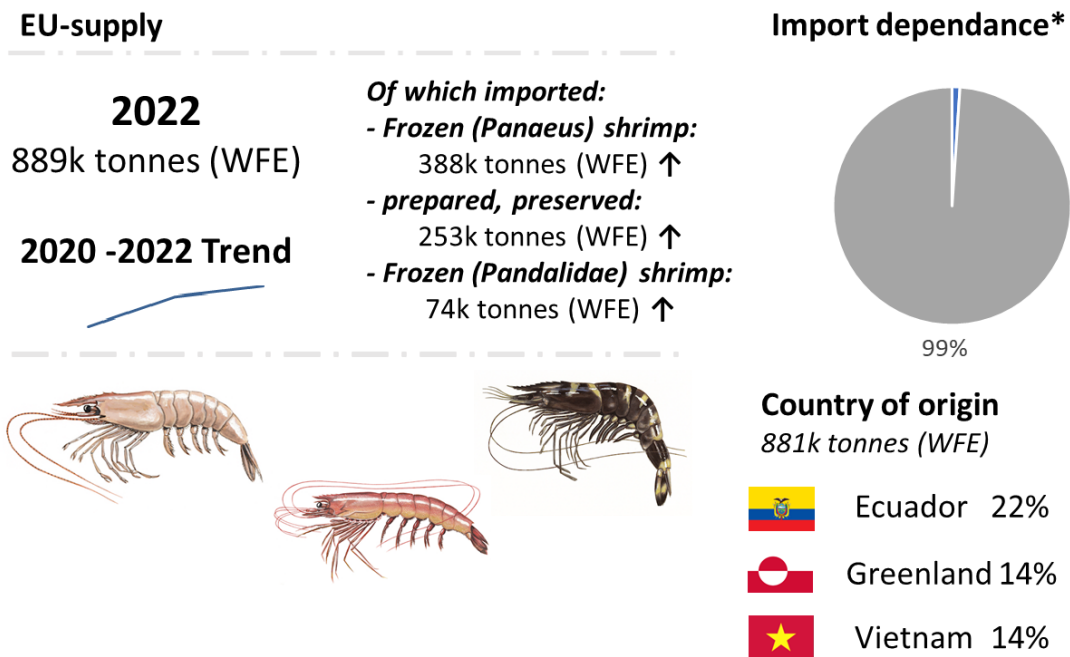
Salmon from Norway enters the EU-27 especially by road via Sweden, Denmark and Poland, where the fish are processed and/or further distributed throughout the EU-27. Processing in the EU-27 is an interesting option for Norway, considering labour cost in the EU is much lower, the import of unprocessed 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 where salmon products were imported from into the EU-27. Materials are mainly originated from Scotland mariculture of Atlantic salmon. 82% of 74 thousand tonnes imported from UK consisted of whole, fresh salmon.

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 relatively low in 2022, around 43%.

### 5.3.2 Shrimp

## Shrimps



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

\*excluding EU non-quota species

The total EU shrimp supply accounted to 8898 thousand tonnes in 2022. This is excluding the non-quota species like brown shrimp (*Crangon crangon*). From this supply, 881 thousand tonnes of shrimp were imported from third countries and 9 thousand tonnes came from shrimp fisheries under fishing quota management in the EU. This shows that the EU is heavily depending on imports for shrimp.

Most of the shrimp were imported from Ecuador (22%; farmed white shrimp *Penaeus vannamei*), Greenland (14%; wild Borealis shrimp), Vietnam (14%; farmed Pacific white shrimp & black tiger shrimp), India (11%; farmed Pacific white shrimp & black tiger shrimp) and Argentina (9%; wild Argentine red shrimp *Pleoticus muelleri*).

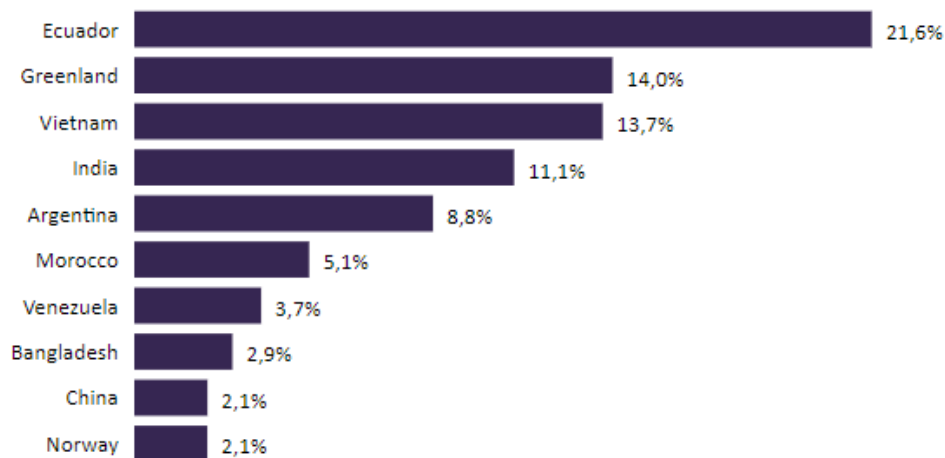


Figure 5.3.2.1: External sourcing countries for shrimp in 2022 in percentage (>1%) of total import (881 thousand tonnes); Source: Eurostat/Comext

Most of the shrimp producing third countries that export to the EU do benefit from GSP or a from 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 *borealis*, *montagui* and *jordani* in 2021 (09.2794, 09.2798, 09.2800). Total allowance for these ATQs is 8,5 thousand tonnes.

Shrimps and prawns of the species *Pleoticus muelleri* have a separate ATQ (09.2826). The quota was already fully utilised at the beginning of the year and is not sufficient to fulfil the demand of the EU processing industry. After the ATQ is exceeded the import duty is 12%. The high import duty and complexity on non-tariff measures will shift processing of the Argentinian *Pleoticus muelleri* shrimp to Asia.

Warm water prawns have a separate ATQ (09.2802). Since 2021 there is a quota allowance of 48,000 tonnes. At the end of 2022 83% of the quota was utilised.

Frozen *Penaeus* shrimp was responsible for 44% of total import in 2022, followed by prepared and preserved (cooked) shrimp (29%).

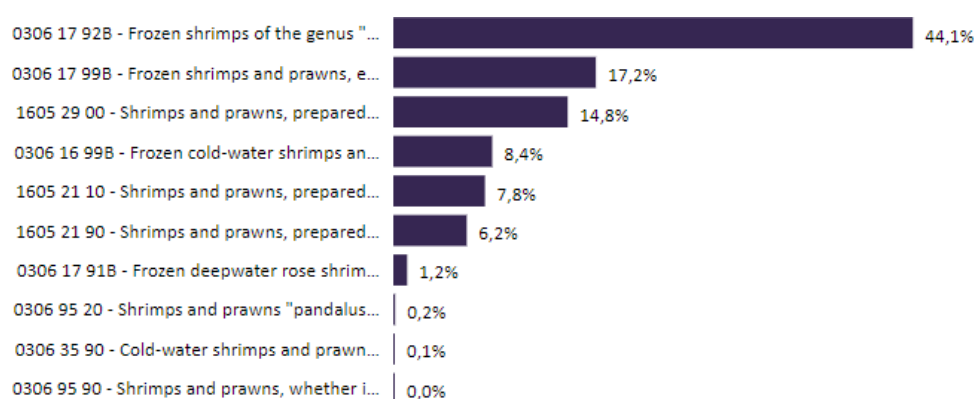


Figure 5.3.2.2: Main imported products of shrimp in 2022 in percentage of total import (881 thousand tonnes); Source: Eurostat/Comext

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.

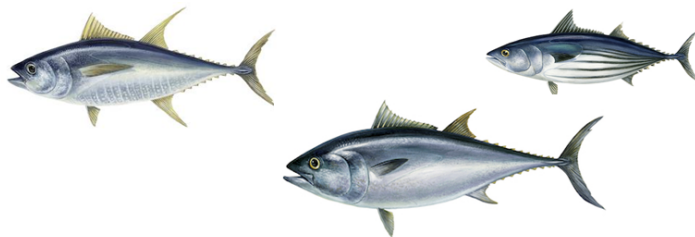
A part of the EU fishing fleet targets brown shrimp (*Crangon crangon*). This specie is not covered by fishing quota management under the CFP. Yearly around 30 thousand tonnes of brown shrimps are landed by mainly the Dutch and German fleet, but also the Danish and Belgian fleet. Because brown shrimp is a non-quota specie it is not mentioned in the import dependence graph. This causes an underestimation of the self-sufficiency.

# Tuna

## EU-supply

**2022**  
1,245k tonnes (WFE)

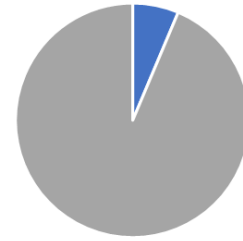
### 2020 -2022 Trend



**Of which imported:**  
 - Prepared 'skipjack'tuna: 628k tonnes (WFE) ↑  
 - Prepared 'yellowfin'tuna : 247k tonnes (WFE) ↑  
 - Whole, frozen: 127k tonnes (WFE) ↑

Source: Eurostat/Comext; EU Catch Report  
 Edited by AIPCE-CEP 2023

## Import dependance\*



94%

### Country of origin

1,167k tonnes (WFE)

	Ecuador	24%
	PNG	9%
	China	8%

\*excluding EU non-quota species and aquaculture

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 1,167 thousand tonnes in 2022 in WFE. From this total EU fisheries landed in total 59 thousand tonnes of quota tuna in 2022. Around 20 thousand tonnes of tuna was farmed in the EU in 2022. This results in a self-sufficiency of 5%. This self-sufficiency is an underestimation, where non-quota tuna fisheries is not included.

The EU tuna fishing fleet lands a significant higher amount tuna than the quoted volume mentioned earlier. Total tuna landings by EU vessels are over 500 thousand tonnes. However, the great majority is landed outside the EU. Spain is the number 1 producer, followed by France and Italy. Most of the tuna captured by the EU fishing fleet is landed and exported in ports near to the tropical fishing regions in Western Africa (Ivory Coast, Ghana) and Indian Ocean (Seychelles, Mauritius, Madagascar), where it is processed into tuna cans and then reexported to EU under preferential trade regimes inherited from the Cotonou agreement, namely the Economic partnership agreements with ESA (Eastern and Southern African) and Western Africa (ECOWAS).

Most important country for tuna in 2021 was Ecuador (24%), followed by Papua New Guinea (9%) and China (8%). Ecuadorian tuna benefit from a free trade agreement between EU and Ecuador.

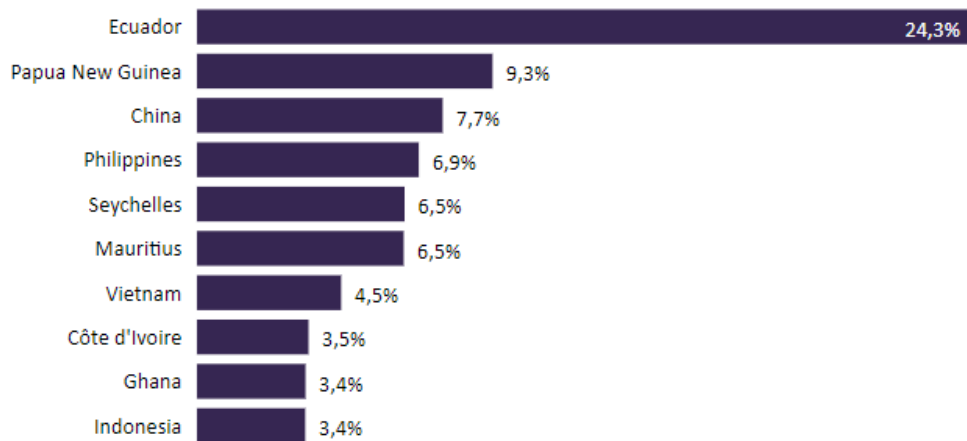


Figure 5.3.3.1: External sourcing countries for tuna in 2022 in percentage (>1%) of total import (1,167 thousand tonnes); Source: Eurostat/Comext

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, as well as employment in local developing countries.

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 mainly located in coastal 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 an 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.

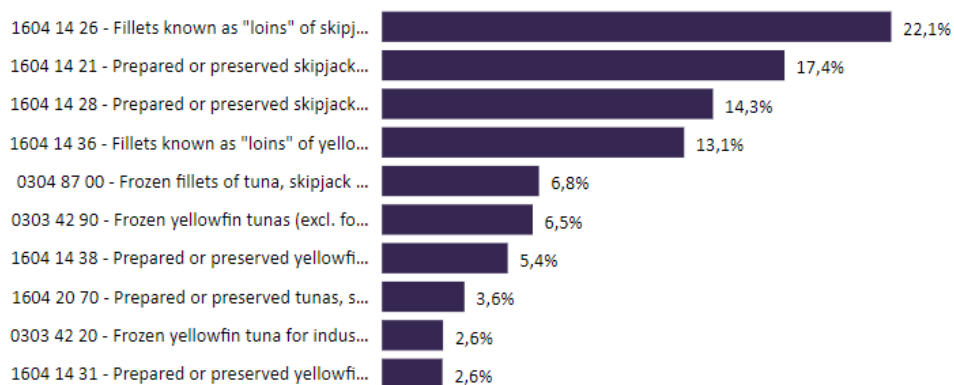


Figure 5.3.3.2: Main imported products of tuna in 2022 in percentage of total import (1,167 thousand tonnes); Source: Eurostat/Comext

Most tuna is imported in a prepared format (cans).

## Mackerel

### EU-supply

**2022**  
337k tonnes (WFE)

### 2020 -2022 Trend

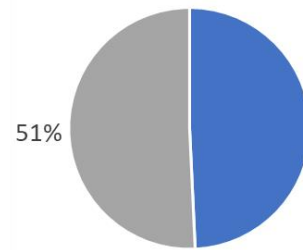


Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

### Of which imported:

- **Whole frozen:**  
107k tonnes (WFE) ↓
- **Frozen fillets:**  
35k tonnes (WFE) ↑
- **Whole fresh:**  
17k tonnes (WFE) ↑

### Import dependence



### Country of origin

171k tonnes (WFE)

	UK	34%
	Norway	19%
	Faroeer	16%

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 landed in total 166 thousand tonnes of Mackerel in 2022.

With a percentage of 49% self-sufficiency in the EU is high. The 171 thousand tonnes of mackerel that is imported into the EU comes from especially UK (34%; 59 thousand tonnes in 2022), Norway (19%; 33 thousand tonnes in 2021) and Faroe Islands (16%; 27 thousand tonnes in 2022).

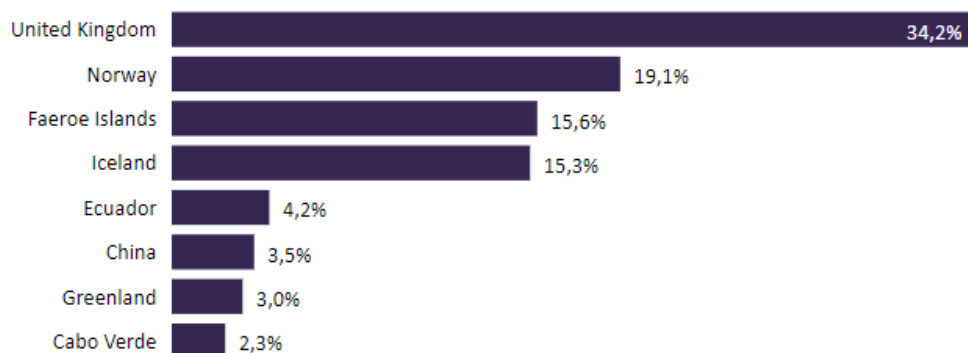


Figure 5.3.4.1: External sourcing countries for mackerel in 2022 in percentage (>1%) of total import (171 thousand tonnes); Source: Eurostat/Comext

Mackerel from the Northeast Atlantic Fisheries is of high importance for the EU seafood market. At the end of 2022 the EU reached an agreement with north-east Atlantic coastal states, UK and Norway on the shared



management of mackerel for 2023. The TAC (782,066 tonnes; -2% on 2022 TAC) has been set according to the scientific advice from ICES. However, fishing quota were unilaterally increased during 2023 bringing their total over the TAC. This is why Northeast Atlantic mackerel is not MSC certified in 2023. It is important to reach an agreement regarding fishing quota allocations to prevent having disruptive consequences that will affect the rest of the supply chain.

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

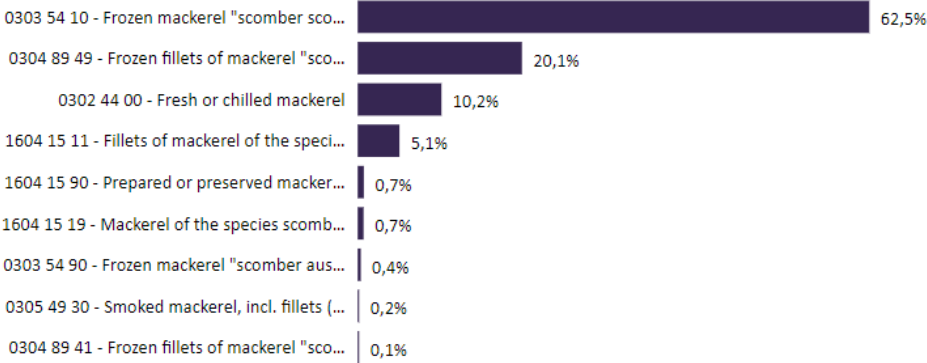


Figure 5.3.4.2: Main imported products of mackerel in 2022 in percentage of total import (171 thousand tonnes); Source: Eurostat/Comext

Frozen mackerel whole accounts for 63% of the mackerel imports, followed by frozen mackerel fillets (20%).

5.3.5 Herring

# Herring

**EU-supply**

**2022**  
769k tonnes (WFE)

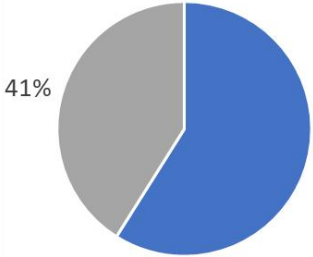
**2020 -2022 Trend**



**Of which imported:**

- **Fillets, frozen:** 99k tonnes (WFE) ↓
- **Meat, frozen:** 90k tonnes (WFE) ↓
- **Whole, frozen:** 56k tonnes (WFE) ↓

**Import dependence**



**Country of origin**

316k tonnes (WFE)

-  Norway 76%
-  Iceland 11%
-  UK 10%



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

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 769 thousand tonnes in 2022.

With a TAC of 419 thousand tonnes in 2022 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 59% in 2022.

At the end of 2022 a delegation of the EU reached an agreement with the north-east Atlantic coastal states, UK and Norway on shares management of Atlanto-Scandian herring in the Northeast Atlantic for 2022. The TAC for 2023 (511,171 tonnes) has 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 tariff) 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 different quota for herrings are added.

Frozen herring fillets were responsible for 31% of the herring imports in 2022, followed by frozen meat (29%).



Figure 5.3.5.1: External sourcing countries for herring in 2022 in percentage (>1%) of total import (316 thousand tonnes); Source: Eurostat/Comext

Norway is the most import third country for herring imports (76%: 239 thousand tonnes in 2022), followed by Iceland (11%; 34 thousand tonnes) and UK (10%; 32 thousand tonnes).

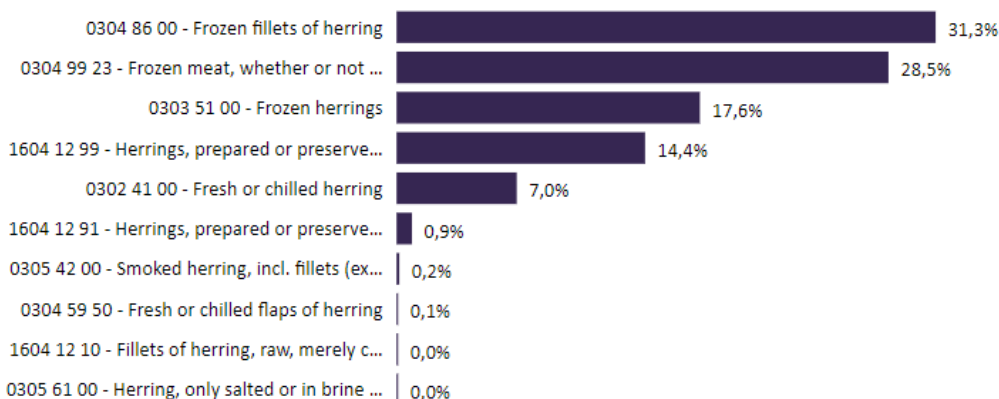


Figure 5.3.5.2: Main imported products of herring in 2022 in percentage of total import (316 thousand tonnes); Source: Eurostat/Comext

## Anchovies

### EU-supply

**2022**  
6k tonnes (WFE)

**2020 -2022 Trend**



*Of which imported:*

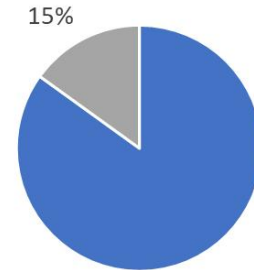
- **Salted:**  
5k tonnes (WFE) ↓

- **Whole frozen:**  
1k tonnes (WFE) ↓



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2022

### Import dependence



### Country of origin

6k tonnes (WFE)



In 2022 Anchovies EU supply decreased to 35 thousand tonnes, -11 thousand tonnes compared to the year before (-23%). With a percentage of 85% self-sufficiency in the EU is high. The 6 thousand tonnes of anchovies that is imported into the EU comes from especially Morocco (46%; 3 thousand tonnes in 2022), Argentina (33%; 2 thousand tonnes in 2022) and Peru (6%; <1 thousand tonnes in 2022).

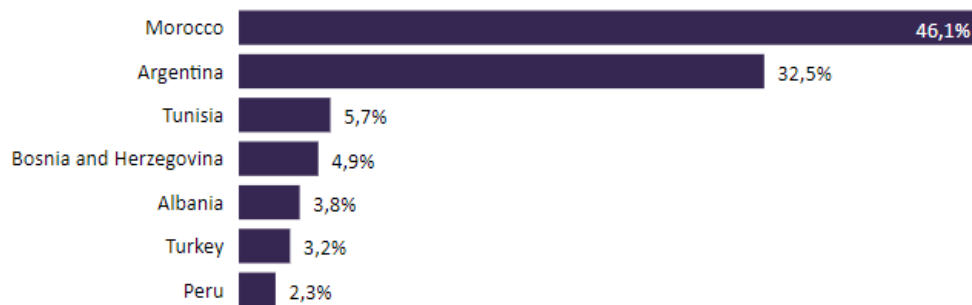


Figure 5.3.6.1: External sourcing countries for anchovies in 2022 in percentage (>1%) of total import (6 thousand tonnes);  
Source: Eurostat/Comext

There are two ATQ allowance available for anchovies. Frozen anchovies for processing (09.2754) has a limit of 500 tonnes duty free import allowance. Anchovies salted or in brine (09.2770) has a limit of 1,500 tonnes duty free import allowance.

Salted anchovies were responsible for 79% of the anchovies imports in 2022, followed by whole frozen anchovies (19%).

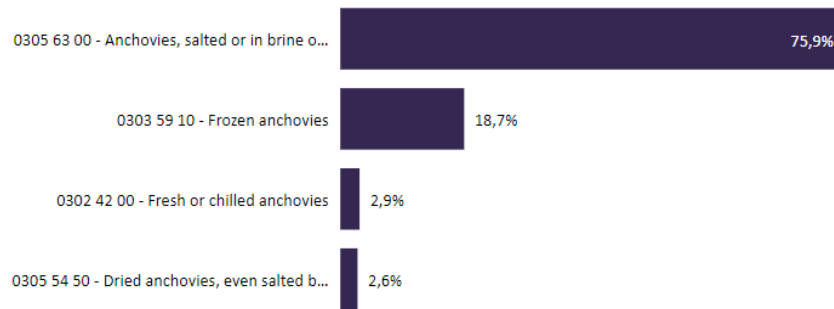
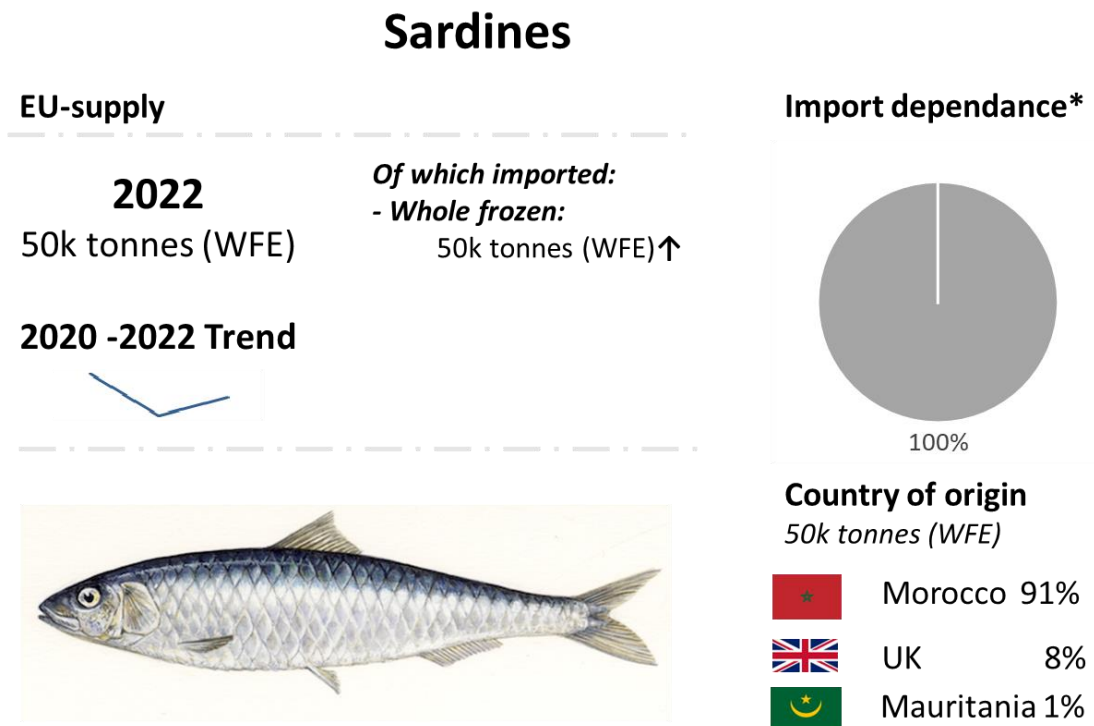


Figure 5.3.6.2: Main imported products of anchovies in 2022 in percentage of total import (6 thousand tonnes); Source: Eurostat/Comext

Most anchovies are processed to especially semi-preserved product in Spain, France and Italy.

### 5.3.7 Sardines



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

\*excluding non-quota EU fisheries

In 2022 Sardines EU import increased to 50 thousand tonnes WFE, +2 thousand tonnes compared to the year before +5%), mainly coming from Morocco (91%; 45 thousand tonnes in 2022), UK (8%; 4 thousand tonnes in 2021) and Mauritania (1%; <1 thousand tonnes in 2022).



Figure 5.3.7.1: External sourcing countries for sardines in 2022 in percentage (>1%) of total import (50 thousand tonnes); Source: Eurostat/Comext

The EU fisheries are catching sardines but this specie is not covered by fishing quota management under the CFP. Over 150 thousand tonnes of sardines are caught by the Croatian, French, Portuguese, Italian, Spanish and Dutch fleets. Taking this number into account the self-sufficiency for sardines is high for the EU.

There is no ATQ allowance available for sardines.

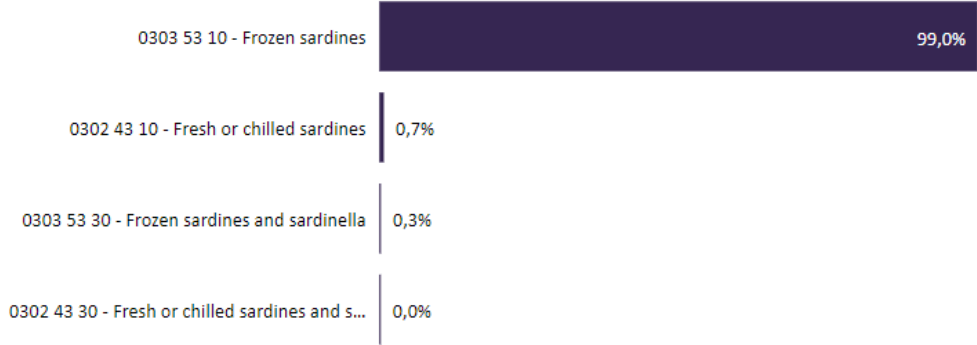


Figure 5.3.7.2: Main imported products of sardines in 2022 in percentage of total import (50 thousand tonnes); Source: Eurostat/Comext

Whole frozen sardines were responsible for >99% of the sardine imports in 2022.

5.3.8 Cephalopods

## Cephalopods

**EU-supply**

**2022**  
542k tonnes (WFE)

**2020 -2022 Trend**

**Of which imported:**

- **Frozen Loligo:** 179k tonnes (WFE) ↑
- **Frozen octopus:** 102k tonnes (WFE) ↓
- **Frozen sepiola:** 36k tonnes (WFE) ↓

**Import dependance\***

100%

**Country of origin**  
542k tonnes (WFE)

- India 17%
- Morocco 19%
- Peru 17%

Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

\*excluding non-quota EU fisheries

The main products that fall under cephalopods category are squid (*Loligo spp*, *Ilex spp*, *Nototodarus spp*, *Todadores spp*, *Dosidicus spp*), cuttlefish (*Sepia spp*), and Octopus (*Octopus spp*). The total cephalopods EU supply in 2022 was 542 thousand tonnes, of which 503 thousand tonnes was frozen.

EU sourcing countries for cephalopods vary depending on the species supplied. For the main species the most important sourcing countries are mentioned below.

Frozen squid (*Loligo spp.*)

Frozen *Loligo* squid represented 36% of the total cephalopod supply in 2022, around 198 thousand tonnes (+5%; +9 thousand tonnes). An important share of the frozen *Loligo* squid comes from the Falklands (UK), India and Morocco.

Frozen Octopus (*Octopus spp.*)

Frozen Octopus represented 19% of the total cephalopod supply in 2022, around 102 thousand tonnes (-3%; -3 thousand tonnes). An important share of the frozen octopus comes from Morocco, Mauritania and Indonesia.

Frozen flying squid (*Ilex spp.*)

Frozen flying squid represented 7% of the total cephalopod supply in 2022, around 35 thousand tonnes (-9%; -4 thousand tonnes). An important share of the frozen *Ilex spp.* comes from China and Argentina.

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 fishery on cephalopods in the EU (squid, cuttlefish and octopus), catching around 200 thousand tonnes of cephalopods yearly.

Although there are European catches, these catches are not sufficient to supply the processing industry in Europe. Availability of raw material for the industry is highly dependent on imports, specially, when talking about *Loligo spp.*, *Ilex spp.*, *Nototodarus spp.*, *Todadores spp.* and *Sepia spp.* and even fully dependant for *Dosidicus spp.*

Once the UK is not part of the EU anymore, raw material from UK overseas territories like Falklands are now suffering import duty. Despite the request of the UK Government, the EU declined to allow the overseas territories to be covered by the UK-EU Trade and Cooperation Agreement (TCA).

UK Regulation EU (no) 2020/1706 is the regulation to open and provide the management of autonomous tariff quotas for certain fishery products for period 2021-2023. Main processing for *cephalopods* is to comply with very restrictive conditions to meet this regulation, therefore, most of the *cephalopods* from UK overseas territories are now sent to China and USA. This has a negative impact on the EU processing industry which loses competitiveness in global market. A less restrictive treatment should be allowed as adequate by the European market.

Most of the cephalopods are consumed and processed in the Southern European countries. These countries are familiarized with cephalopods.

## Surimi

### EU-supply

**2022**  
240k tonnes (WFE)

### 2020 -2022 Trend



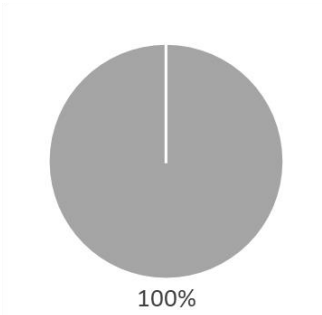
### Of which imported:

- **Frozen Surimi:** 213k tonnes (WFE) ↓
- **Surimi preparations:** 27k tonnes (WFE) ↑



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

### Import dependance\*



### Country of origin

240k tonnes (WFE)

	USA	72%
	India	12%
	Vietnam	5%

\*excluding EU fisheries for surimi

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

Surimi base (or frozen surimi in blocks) is sold to food processors, which transform the material with other ingredients to give it texture, taste and colour. Most common surimi seafood in the EU is crabstick imitation, but other develop such as baby-eel imitations, or calamar rings imitations, all ready to eat.

The import volume of surimi (both frozen surimi paste, and surimi seafood) was 240 thousand tonnes WFE in 2022 (-1%; -2 thousand tonnes in 2021). The most important country for surimi in 2022 was USA (72%), followed by India (12%) and Vietnam (5%).

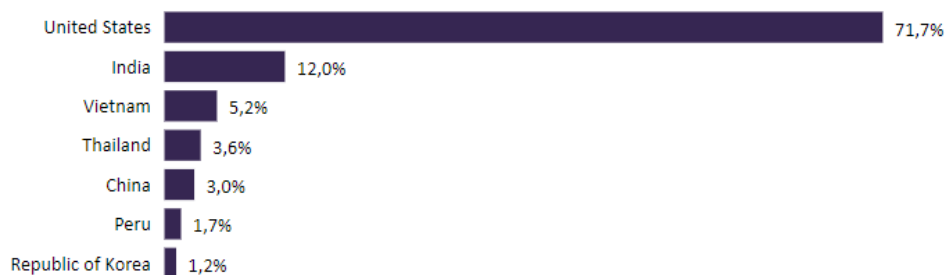


Figure 5.3.9.1: External sourcing countries for surimi in 2022 in percentage (>1%) of total import (240 thousand tonnes); Source: Eurostat/Comext

EU has a single fishery realizing surimi paste from blue whiting, under statistical secret. The main surimi processors in the EU are France, Spain and Lithuania. Frozen surimi of Alaska Pollock was responsible for 46%

of the surimi imports. 89% of all surimi imports was frozen surimi. The other 11% of imports in 2022 consisted of frozen surimi presentation -in other words finished products-

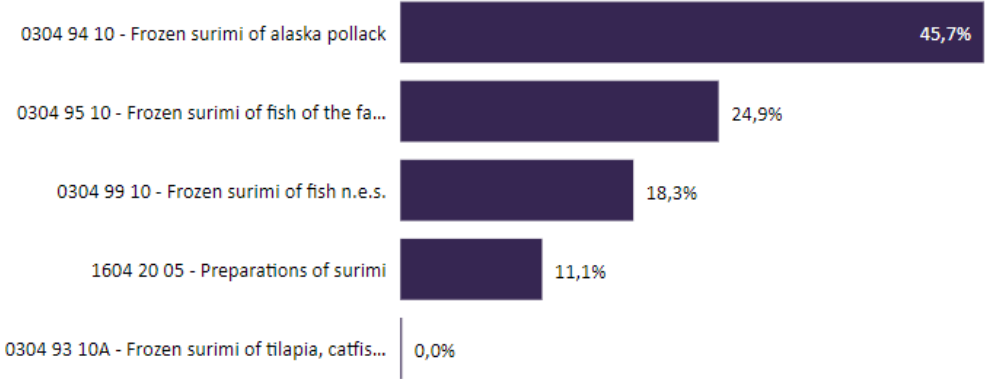


Figure 5.3.9.2: Main imported products of surimi in 2022 in percentage of total import (240 thousand tonnes); Source: Eurostat/Comext

There is an ATQ allowance available for surimi as a raw material for further processing (09.2772). Around 85% of total agreed quantity (60 thousand tonnes) was utilised in 2022.

5.3.10 Pangasius

# Pangasius

**EU-supply**

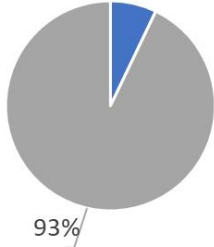
**2022**  
196k tonnes (WFE)

**2020 -2022 Trend**

**Of which imported:**

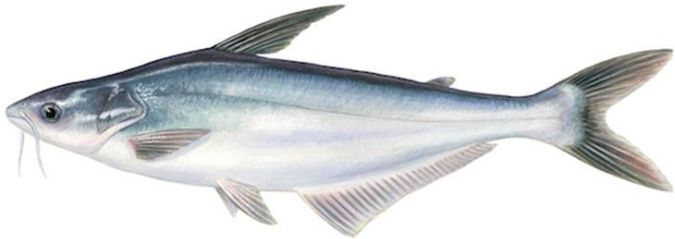
- **Fillet,frozen:** 177k tonnes (WFE) ↑
- **Whole,frozen:** 5k tonnes (WFE) ↑

**Import dependance**



**Country of origin**  
182k tonnes (WFE)

Vietnam 100%



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

Pangasius is one of the key cultivated finfish species across the globe. The EU market actually represents only a tiny percentage of the consumption. Pangasius has been growing in EU consumption and increased to 196 thousand tonnes in 2022 (+29%; +44 thousand tonnes).

There is EU production of pangasius, around 14 thousand tonnes. EU import dependency is 93%.





Figure 5.3.10.1: External sourcing countries for pangasius in 2022 in percentage (>1%) of total import (182 thousand tonnes); Source: Eurostat/Comext

Pangasius is an aquaculture product, mainly produced in Vietnam. >99% of the import volume in 2022 came from this third country (181 thousand tonnes). Almost all pangasius was imported as frozen fillets (>99%).

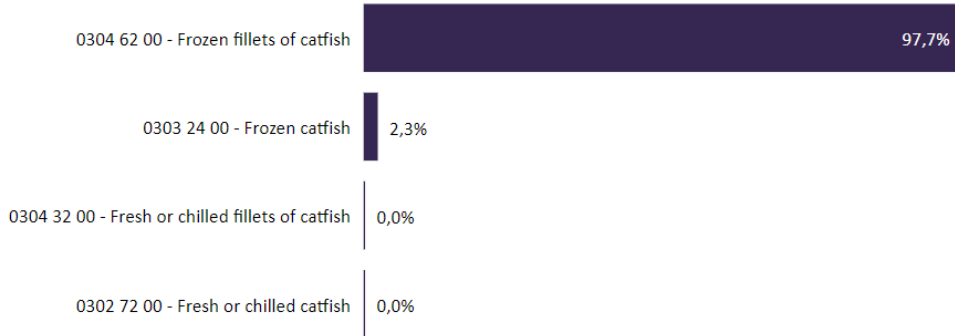


Figure 5.3.10.2: Main imported products of pangasius in 2022 in percentage of total import (182 thousand tonnes); Source: Eurostat/Comext

### 5.3.11 Tilapia

## Tilapia

#### EU-supply

**2022**  
45k tonnes (WFE)

**2020 -2022 Trend**



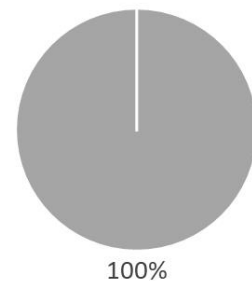
#### Of which imported:

- **Fillet,frozen:** 33k tonnes (WFE) ↓
- **Whole,frozen:** 12k tonnes (WFE) ↓



Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

#### Import dependence



#### Country of origin

45k tonnes (WFE)

	China	84%
	Vietnam	6%
	Indonesia	6%

Tilapia is one of the key cultivated finfish species across the globe second in scale only to Chinese carp. The EU market 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 45 thousand tonnes or about 1-2% of global supply in 2022.

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



Figure 5.3.11.1: External sourcing countries for tilapia in 2022 in percentage (>1%) of total import (45 thousand tonnes); Source: Eurostat/Comext

Tilapia is an aquaculture product with production in several regions of the world. 84% of the EU import volume in 2022 came from China (37 thousand tonnes). Other important countries were Vietnam (6%) and Indonesia (6%).

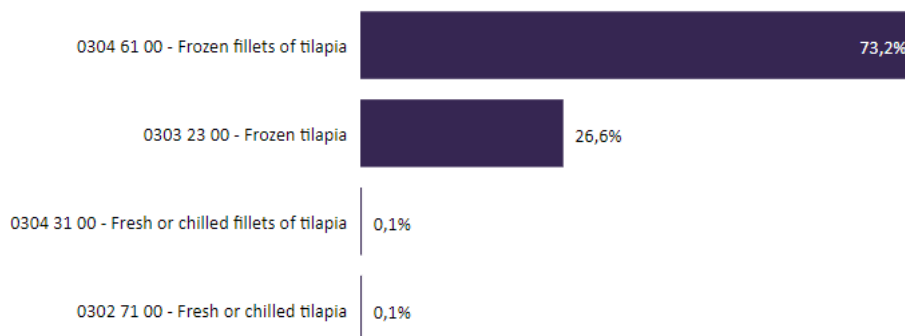


Figure 5.3.11.2: Main imported products of tilapia in 2022 in percentage of total import (45 thousand tonnes); Source: Eurostat/Comext

Most of the tilapia was imported as frozen fillets (73%), followed by frozen whole tilapia (27%).

### 5.3.12 Nile perch

## Nile Perch

### EU-supply

**2022**  
42k tonnes (WFE)

**2020 -2022 Trend**

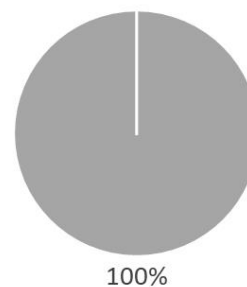


#### Of which imported:

- **Fillet,frozen:**  
20k tonnes (WFE) ↑
- **Fillet,fresh:**  
20k tonnes (WFE) ↑
- **Whole,frozen:**  
2k tonnes (WFE) ↓



### Import dependance



### Country of origin

42k tonnes (WFE)

-  Tanzania 47%
-  Uganda 42%
-  Kenya 11%

Source: Eurostat/Comext; EU Catch Report  
Edited by AIPCE-CEP 2023

Nile perch is the most important freshwater product imported from Eastern Africa, where it is captured in Lake Victoria. All Nile perch comes from Uganda, Tanzania or Kenya, all 3 coastal countries to the Lake Victoria. The EU imported 42 thousand tonnes of Nile perch in 2022, +28% compared to 2021.

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

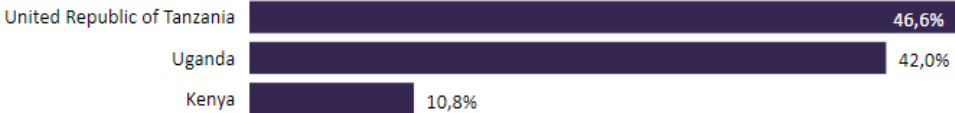


Figure 5.3.12.1: External sourcing countries for Nile perch in 2022 in percentage (>1%) of total import (42 thousand tonnes); Source: Eurostat/Comext

Most important countries for Nile perch in 2022 were Tanzania (47%; 19 thousand tonnes), followed by Uganda (42%; 18 thousand tonnes) and Kenya (11%; 5 thousand tonnes).

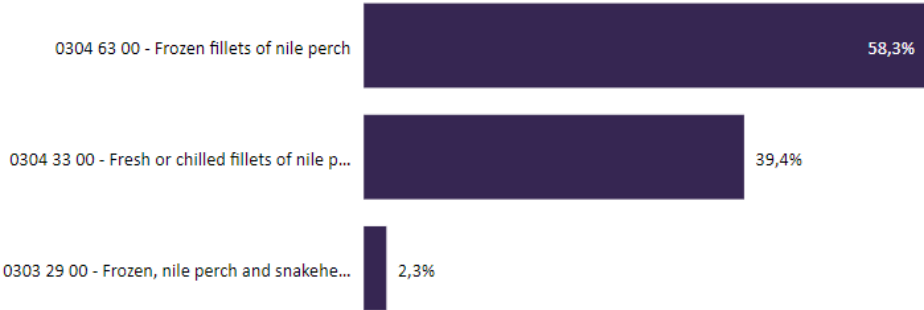


Figure 5.3.12.2: Main imported products of Nile perch in 2022 in percentage of total import (42 thousand tonnes); Source: Eurostat/Comext

Most of the Nile perch was imported as frozen fillets (48%) or fresh fillets (47%). The fresh fillets are imported into the EU using the super-chilling technique - a technique that reduces the temperature of fish uniformly to a point slightly below that which is obtained in melting ice -.

## Sea bass

### EU-supply

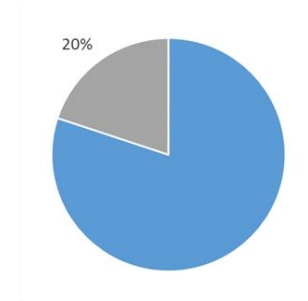
**2022**  
124k tonnes (WFE)

**2020 -2022 Trend**





**Of which imported:**  
 - **Whole, fresh:** 23k tonnes (WFE) ↓  
 - **Whole, frozen:** 1k tonnes (WFE) ↑

### Import dependence\*



### Country of origin

25k tonnes (WFE)

	Turkey	98%
	UK	2%

\*excluding EU fisheries for seabass

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 of Sea bass.

EU cultivated sea bass reached the volume of 99 thousand tonnes in 2022. EU self-sufficiency reached 80%.

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



Figure 5.3.13.1: External sourcing countries for sea bass in 2022 in percentage (>1%) of total import (25 thousand tonnes); Source: Eurostat/Comext

The most important sourcing third country for sea bass in 2022 was Turkey. 98% of all import came from this country.

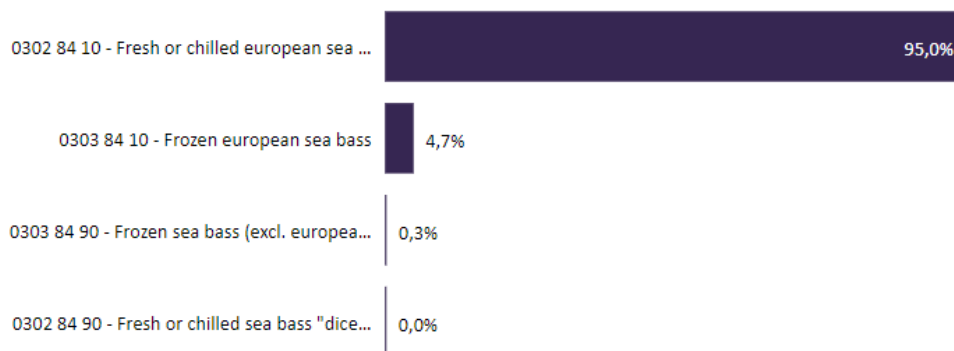


Figure 5.3.13.2: Main imported products of sea bass in 2022 in percentage of total import (25 thousand tonnes); Source: Eurostat/Comext

Most of the sea bass was imported as fresh whole European sea bass (95%).

## Sea bream

### EU-supply

**2022**  
147k tonnes (WFE)

**2020 -2022 Trend**

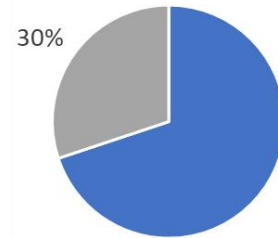


**Of which imported:**

- **Whole, fresh:**  
42k tonnes (WFE) ↓

- **Whole, frozen:**  
3k tonnes (WFE) ↓

### Import dependence



### Country of origin

44k tonnes (WFE)



Source: Eurostat/Comext; EU Catch Report; FEAP  
Edited by AIPCE-CEP 2023

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 bream in the EU. However, most of 99 thousand tonnes EU production (99%) came from aquaculture. Self-sufficiency was 70%.

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

The main EU producers are Greece, Spain and Italy.



Figure 5.3.14.1: External sourcing countries for sea bream in 2022 in percentage (>1%) of total import (44 thousand tonnes); Source: Eurostat/Comext

Import volume decreased to 44 thousand tonnes in 2022. Most important sourcing third country for sea bream in 2022 was Turkey (87%), followed by Albania (5%) and Morocco (4%).

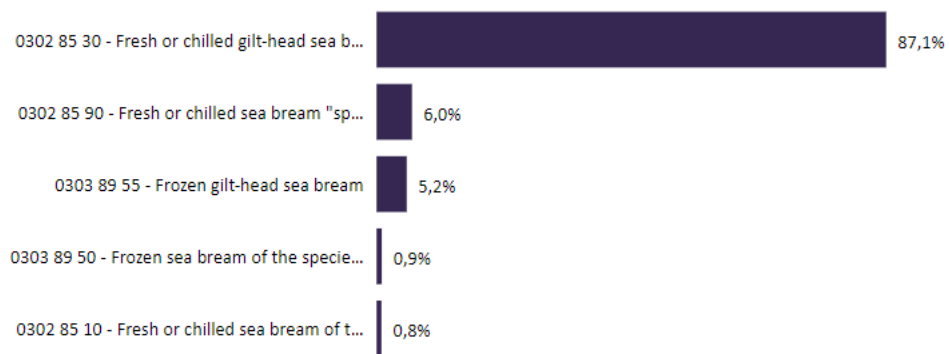


Figure 5.3.14.2: Main imported products of sea bream in 2022 in percentage of total import (62 thousand tonnes); Source: Eurostat/Comext

Most of the sea bream was imported as fresh whole ‘Sparus aurata’ (87%).

## 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](mailto:aipce@kellencompany.com)). There are also further publications and commentaries at our website: [www.aipce-cep.org](http://www.aipce-cep.org).

Supplementary Finfish tables can be requested by members via the AIPCE-CEP secretariat ([aipce@kellencompany.com](mailto:aipce@kellencompany.com)).