

Exporting frozen cultured black tiger shrimp to Europe

The giant tiger prawn, also called black tiger shrimp, is one of the most popular cultured shrimp species in the world. In 2013, worldwide aquaculture produced over 650,000 tonnes of black tiger shrimp (virtually all produced in Asia). Most of this cultured shrimp is exported to the European Union. The European market is under pressure due to strong competition from other shrimp species. However, black tiger shrimp remains an important product in the food service segment in Northern, Western and Southern Europe.

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1. Product description

Black tiger shrimps (*Penaeus monodon*) are part of the Penaeidae family. Other species in this family are *P. vannamei* (whiteleg shrimp), *P. setiferus* (Atlantic white shrimps) and *P. indicus* (Indian prawn). Female shrimps can reach sizes of 33 centimetres, but are typically around 25–30 centimetres. Male black tiger shrimps are smaller.

When “shrimps and prawns” is referred to in this survey, this concerns the following [Harmonised System](#) codes, unless stated otherwise:

- 030613 - All frozen, peeled and unpeeled, raw and steamed shrimps and peeled boiled black tiger shrimps,
- 030617 - Frozen shrimps and prawns,
- 160520 - Shrimps and prawns,
- 160521 - Shrimps and prawns, not in airtight container,
- 160529 - Frozen cooked unpeeled shrimps and value added shrimps (like skewers, spies and marinated shrimps, in airtight containers).

Processing and colour

Colour

- Raw: Grey to black stripes with a little green touch. Associated stripes on the peeled meat.
- Cooked: Bright red shell and white meat.

Processing

Preferred processing varies from country to country, and can be:

- Whole (HOSO)
- Shell on (SO)
- Peeled tail on (PTO)
- Peeled undeveined (PUD)
- Peeled and deveined (P&D)
- Tail-on.

In northern Europe, PUD shrimps are popular. In the south of Europe, raw HOSO (mainly *vannamei*) shrimps are preferred for the cooking industry.

Measurement

In Europe, the black tiger shrimps are measured by pieces per kilogram (pc/kg). For Europe, 30–40 pc/kg are preferred in mainstream markets. However, certain niche markets prefer larger sized 20–30 pc/kg.

Glazing

Glazing of black tiger shrimps is usually between 0–20% and depends on the preference of the buyer.

Packaging

Packaging requirements differ widely between customers and market segments. Therefore, it is crucial that you discuss your customers' preferred packaging requirements with them. Some general characteristics are:

- Frozen black tiger shrimps are mostly imported in cartons with a certain amount of shrimp in it. The number of shrimp per package depends on the size or the weight. For example, 20/30, 30/40, 40/50 pieces per kilogram.
- For business-to-business trade, frozen black tiger shrimps are often imported in bulk, in quantities of 5–25 kg per package, IQF (individually quick frozen). Another frequently used practice is 1–5 kg block frozen.

Picture 1: Wholesale packaging of IQF black tiger shrimps.



Picture 2: Supermarket packaging, carton.



Labelling

There are [specific labelling requirements for fish](#) sold in the European Union. In addition, under new rules that went into effect in December 2014 (Directive No. 1379/2013), labels must provide precise information on the production/presentation of the products. For example: aquaculture / and whole (HOSO), shell on (SO), peeled tail on (PTO), peeled undeveined (PUD) or peeled and deveined (P&D), tail-on, butterflied. This applies to all unprocessed seafood, as well as to some processed seafood, regardless of whether it is pre-packed. The information must be provided on the labelling or packaging of the fishery product. Or by means of a commercial document accompanying the goods.

Tip:

See our study [EU Buyer requirements for Fish and Seafood](#) for more information about labelling requirements.

2. Which European markets offer opportunities for exporters of black tiger shrimps?

First, we give a picture of imports for frozen shrimps and prawns in total. Then, we focus on black tiger shrimp. The figures of black tiger shrimps are based on assumptions of export shares of the black tiger production countries in Asia (mainly Bangladesh and Vietnam, and also India and Indonesia).

The black tiger shrimps consumed in Europe are all imported from countries outside Europe, therefore no production data is included. The export of black tiger shrimps in Europe are re-exports from importing European countries.

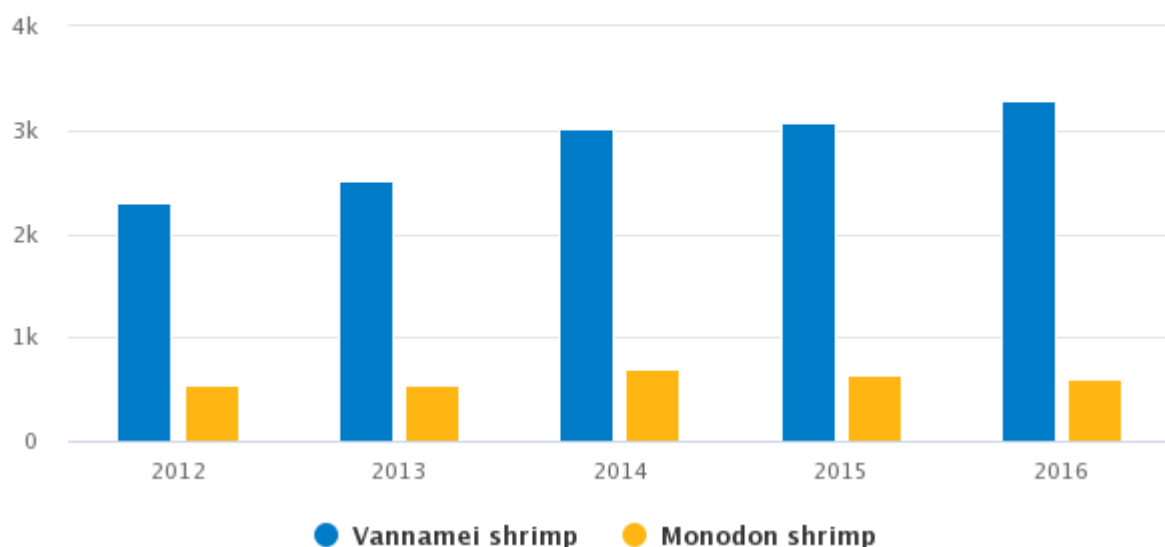
Imports of frozen shrimps and prawns

In 2012–2016, European imports of frozen shrimp and prawns (excluding cold-water shrimp and prawns) increased on average by 8.2% per year, with imports growing from €2.8 billion to €3.9 billion. This is mainly due to increase in imports of *L. vannamei* shrimp. Imports of black tiger shrimp remained relatively stable.

Compared with 2015, the total import value in 2016 increased by 4.8%. Import quantities remained virtually stable. Following the global supply crisis in 2014 caused by early mortality syndrome (EMS) resulted in a price increase in 2014, subsequently 2015 and 2016 were less tumultuous years.

Figure 1: European import of frozen shrimps and prawns, by main type, 2012–2016

in € million



Source: Trademap 2017

Spain (€1.0 billion imports, 27% of European imports) is the largest importer of frozen shrimp and prawns, followed by France (€667 million, 17%). Other important importing countries are Italy (€442 million), the United Kingdom (€385 million), Belgium (€313 million) and Germany (€306 million).

The Netherlands, Germany and Belgium mainly import their shrimps from countries that produce both black tiger and *L. vannamei* shrimp, such as Vietnam, while Spain, France, and Italy mainly import *L. vannamei* shrimp.

Bangladesh takes a special role as supplying country; black tiger shrimps account for nearly 100% of the Bangladeshi shrimp production. Looking at imports from the Netherlands, Germany and Belgium, a relatively

large share of their imports comes from Bangladesh. In these countries, shrimp imports from Bangladesh account for 18%, 20% and 20% of their shrimp imports respectively.

Imports of black tiger shrimps

Along with Japan, Europe is one of the most important markets for black tiger shrimps. While Japan mainly sources the largest size black tiger shrimps, Europe also imports smaller sizes. The contribution of black tiger shrimp to total shrimp imports is decreasing. The European black tiger shrimp import share dropped from 19% in 2012 to 15% in 2016, as a result of the price-oriented behaviour of European consumers (since 2008). Compared to 2015, European black tiger shrimp imports decreased by 5.4% in 2016.

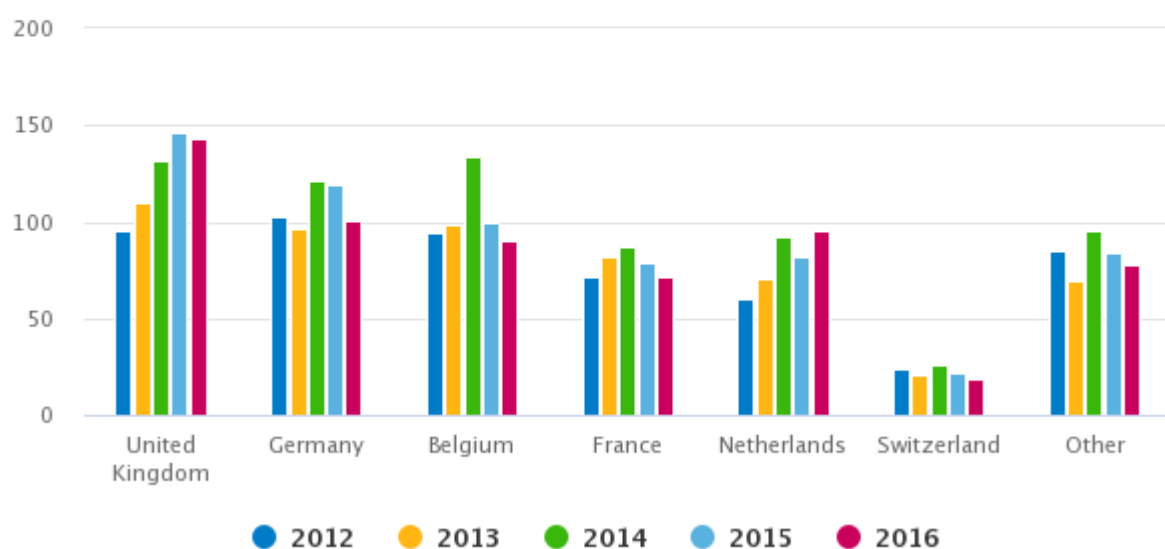
Total European imports amounted to €598 million in 2016. Main importer United Kingdom imported €146 million of black tiger shrimp in 2016 (24% of European imports). The second largest importer Germany imported €122 million (17%). Other large importing countries were Belgium (€101 million), France (€86 million), the Netherlands (€83 million) and Switzerland (€24 million).

The United Kingdom (+11%) and the Netherlands (+12%) are the only two main importers in Europe that realised positive growth on average per year during 2012–2016. Other main destinations (Germany, Belgium, France and Switzerland) experienced a decline in imports of black tiger shrimp.

Imports of black tiger shrimp in the United Kingdom and Germany are dominated by Bangladeshi supply (€60–70 million per year), followed by Vietnamese supply (€35–45 million per year).

Figure 2b: Leading European importing countries of frozen black tiger shrimps 2012–2016

in € million



Source: Trademap 2017

Leading suppliers of frozen shrimp and prawns

Ecuador, Argentina and India are the leading suppliers of frozen shrimp and prawns. Together, they represented 43% of total European imports in 2016. Other leading suppliers are Vietnam, Bangladesh, and Spain.

Leading suppliers of black tiger shrimp

Bangladesh (48% market share) is the main exporter of black tiger shrimp to the European market. The country exported nearly twice as much to Europe as the second largest exporting country Vietnam (26%). Together,

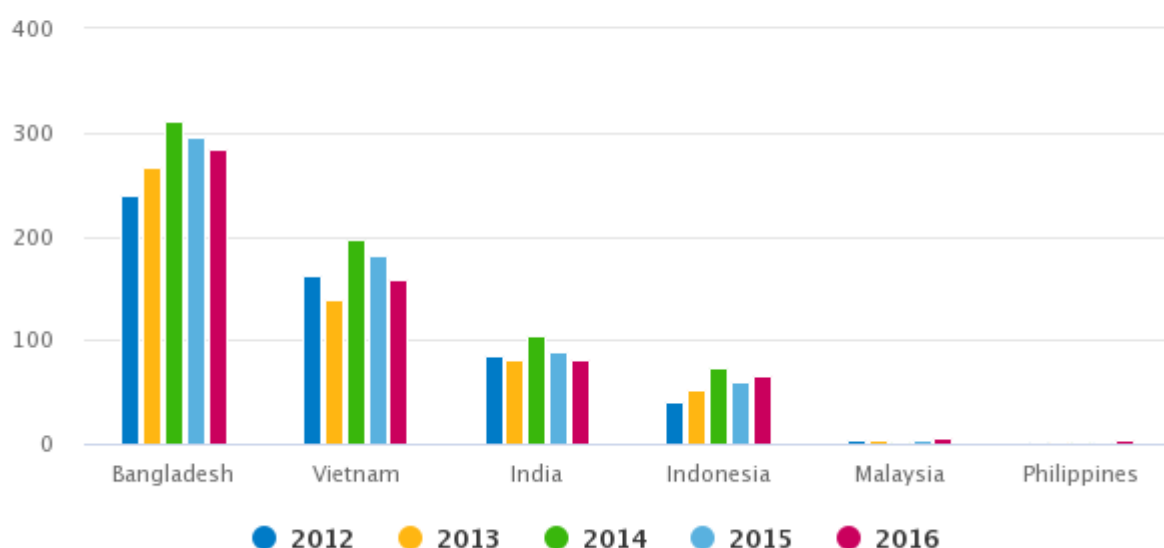
they supplied almost three-quarters of total exports to Europe in 2016. India and Indonesia are significant exporters of black tiger shrimp to Europe as well. Malaysia and Philippines complete the list of exporters to Europe. Their exports are quite small, at €6.1 million and €3.3 million respectively.

Myanmar is an upcoming exporter of both wild caught and farmed black tiger shrimps. Farmed shrimps exports is expected to be allowed this year (2016). However, quantities will build up slowly.

The top 3 exporters of black tiger shrimp to Europe all experienced a decline in exports over the last two years. In Vietnam, production of white leg shrimps has grown sharply since 2011, resulting in a declining export share of black tiger shrimp (from 80% to 35% in 2016). In the other countries, the share of black tiger shrimp in exports is also declining. In 2012–2016 Bangladesh continued to outperform (4.4% growth on average annually), due to strong growth in 2013 and 2014.

**Figure 3: Leading suppliers of monodon shrimps to Europe
2011–2016**

in € million



Source: Trademap 2017

Tips:

Benchmark your company against your peers from Bangladesh, Vietnam, Ecuador and India, as well as against your peers from Spain and the other top supplying countries of shrimps, prawns and black tiger shrimps. One source that could be used to find exporters of these products per country is [International Trade Center \(ITC\) International Trade Statistics](#) (you have to register first).

Probably the best chances to access the European market is to focus on the largest importing countries of black tiger shrimp, like number one United Kingdom and number two Germany.

If you want to access the European market, consider participating in the [Seafood Expo Global](#) in Brussels, Belgium or [Conxemar](#) in Vigo, Spain. These two events are the largest seafood trade shows in Europe. These trade shows give you the opportunity to showcase your products and meet with potential buyers from European countries.

The TARIC database shows more details about import duties for Chapters [0306](#) and [1605](#).

Visiting the leading events in Europe also gives you a good idea of trends in the seafood market as well as interesting contacts with potential buyers.

You can do more research on these exporting countries by visiting the websites of Vietnam Association of Seafood Exporters and Producers ([VASEP](#)) or Marine Products Export Development Authority ([MPEDA](#)), which is an Indian organisation that promotes the export of seafood from the country.

For further research on price information, you can visit the websites of [Globefish](#), which is a reliable source of world fish trade and meter news from the Food and Agriculture Organization (FAO) of the United Nations (UN) or the [European Market Observatory for Fishery and Aquaculture Products](#) (EUMOFA), a marketing intelligence tool on the fisheries and aquaculture sector of the European Union.

Exports

Total European exports of frozen shrimps and prawns increased by 7.9% per year on average in 2012–2016 to €1.0 billion. Virtually all exports go to other European countries. Part of this intra-EU trade flow consists of black tiger shrimps, however it is unknown how large this share is. Most probably, this share is less than 10% of total exports.

Spain and Belgium are the largest European exporters of frozen shrimp and prawns (together €518 million in 2016, 49% of total European exports). Other important exporters were the Netherlands (13% share), Germany (8%), Portugal (7%) and the UK (6%). Globally imported shrimp enters Europe via the port of Antwerp, from where the shrimp is distributed to surrounding European markets.

The price difference between import and re-export was highest for Spain. This can be attributed to the large processing industry in that country. Spain imports large volumes of cheap raw vannamei shrimp materials (mostly from Argentina and Ecuador), and after cooking and packaging a small share of total output is re-exported.

Tips:

More often than not, importers of shrimp are also re-exporting shrimp. To find importers in Europe you can best search the company databases of national associations. Visit, for example, the importer/exporter database of [Dutch Fish](#), or the Belgian database of [Visengezond](#).

You can find more information about the shrimp market at [FAO](#).

Gather data about market developments of black tiger prawns and whiteleg shrimps. Globefish provides quarterly information about developments in the global seafood market.

Consumption

Unfortunately, there is no precise information on consumption in Europe and apparent consumption is very difficult to calculate on account of exports often being reprocessed inside the European Union and values and volumes changing. In general, however, shrimp represents only a small part of overall seafood consumption. The share in terms of value is greater than the share in terms of volume. This is both the case for shrimp in total, and even more for black tiger shrimp (as their price is relatively high).

As there are many variables influencing shrimp market prices, it is also difficult to forecast future demand. Prices have a large influence on demand. In turn, prices are influenced by global availability and global demand.

Both are difficult to predict.

Countries such as Spain, Italy, and France import raw vannamei material to a large extent, mostly whole (HOSO), as a source for domestic shrimp cookeries. Northern and western European countries, on the other hand, import more cooked or peeled shrimps.

As mentioned earlier, northern and western European countries predominantly import their shrimps from Asian countries, while southern European countries tend to source mainly from South American countries.

Tips:

To find information about consumer preferences for shrimp products, take a look at the websites of large retailers in the different European Union Member States such as [Albert Heijn](#) (the Netherlands), [Eroski](#) (Spain), [Carrefour](#) (France), [Sainsbury's](#) (United Kingdom), and [Metro](#) (Germany). You can use an online translate service like [Google Translate](#) to translate 'shrimp' into the language of your choice.

If you want to do business with Spanish importers, make sure your marketing staff speaks Spanish. Otherwise it will be difficult for you to compete with South and Central American exporters that are already supplying to Spanish importers.

3. What trends offer opportunities on the European market for frozen black tiger shrimps?

This chapter is mainly focused on the trends for black tiger shrimps. For more information on trends for the European shrimp market, see our study [Trends on the European shrimp market](#).

Sustainable production becoming a requirement

See for more information below, in the chapter about requirements.

Diseases and breeding difficulties threaten black tiger shrimp production

The production of shrimp continues to be threatened by diseases such as the Early Mortality Syndrome (EMS), white-spot syndrome, yellowhead and Taura. Enterocytozoon hepatopenaei (EHP) was discovered in several shrimp farming countries in Asia in early 2016. EHP is a microsporidian disease that is hard to detect and to eliminate. Outbreaks cause supply shortages, high prices and a deteriorating position of traders.

Using specific pathogen-free (SPF) post-larval shrimp can prevent disease contamination. For black tiger shrimp, however, various difficulties in captive breeding have made this impossible. The shrimp born in captivity do not breed as well as wild-caught shrimp. Growth rates in captive stock also seem to be decreasing.

Whiteleg (*L. vannamei*) and blue shrimp are less affected by these issues. This considerably strengthens their competitive position compared to black tiger shrimp.

Tips:

To avoid EHP, it is important that the entire production chain is clean (so farms, waterways, and hatcheries should be all free of EHP). The impact of this disease can also be reduced by lower density stocks and by using lower salt levels. EHP can also be eliminated by high temperatures and freezing the shrimp.

Other measures to prevent EMS are a strict control on water quality and regulation of the feeding programme. Also, contact your local seafood association for technical help in this matter.

For more information, see the [TARS 2016 meeting report](#) of the [Aquaculture Roundtable Series](#) (TARS) on measures to avoid diseases and recovery solutions for the shrimp culture industry in Asia.

Vannamei prices influence demand for black tiger shrimp

During normal times, black tiger shrimps are more expensive than vannamei shrimps. A temporarily different situation occurred in 2013-2014 when the shortage of vannamei shrimp supply pushed the prices of vannamei shrimps up to the same level as for black tiger. This was a positive situation for black tiger shrimps, as with equal prices consumers prefer to buy black tiger shrimp on account of its colour and taste.

As a result, exports from Bangladesh to Europe increased sharply in 2013 and 2014. In 2015 prices of vannamei returned to normal levels and this resulted in a (previously forecasted) drop in black tiger consumption in Europe, as well as a drop in imports of black tiger shrimp from Bangladesh (see Figure 3).

Relatively stable demand, also in Southern Europe

Although the lion's share of consumption in southern Europe comprises vannamei shrimp, there is also a niche market for large size black tiger shrimp. Consumers in southern Europe are very much quality-oriented and higher-income consumer groups prefer to purchase larger-sized shrimp, especially in the out-of-home segment. Despite some pressure on demand because consumers sometimes spent less out-of-home during worse economic times, the demand from this market segment has remained relatively stable.

Convenience food in demand

In Europe, the demand for convenience food is growing every year. People live busy lives and feel considerable time pressure. Therefore they prefer meals that are easy to prepare and easy to cook. In addition, there is a trend towards more ready-made products.

Currently, only simple value-adding activities such as peeling and portioning are outsourced to processors in developing countries. However, as a result of price pressure, more complex value-adding activities will be outsourced in the long term, such as the production of marinated shrimp.

Tips:

Discuss with your buyers the potential of value-added products on the European market.

If feasible, invest in value-adding processing to increase the value of your product.

Note that you need to obtain food safety certifications such as the British Retail Consortium (BRC) or International Featured Standards (IFS) for value-added products. This is because these products are sold through food retail or high-end food service channels.

Focus on larger sizes

In the long term, black tiger shrimp will increasingly become a niche product. If vannamei production recovers completely and prices fall, it will be difficult for black tiger shrimp to compete with sizes that overlap with vannamei. Black tiger shrimp will become more of a niche product. Most demand for larger-sized black tiger shrimp will continue to come from the out-of-home (restaurants) segment all over Europe, while retail sales of

large-size black tiger shrimp will particularly take place in southern Europe.

Tips:

Make a plan with your buyer to find niche markets to sell your black tiger shrimps to Europe.

For the long term, invest in a good marketing plan to sell your large black tiger shrimps into Europe.

Organic black tiger shrimps

There is also a small but growing demand for organic seafood. It can be interesting for you to investigate the market potential of organic black tiger shrimps in Europe.

Tips:

Organic black tiger shrimps could be a potential niche market. As much of the primary production of black tiger shrimps happens in traditional farms/ponds, a transfer to certified production needs mainly organising, not necessarily change of production.

For more information about organic seafood, see our factsheet [Exporting organic seafood to Europe](#).

4. What requirements should black tiger shrimps comply with to be allowed on the European market?

Before you want to sell to European buyers, you need to fully understand the European Union's legal requirements that apply to your fish and seafood products. Understanding is the first thing, after that follows the route towards compliance. See our study [EU Buyer requirements for Fish and Seafood](#) to better understand the legal requirements and also additional requirements that European buyers may ask from you. The most important and specific requirement for shrimps is sustainability certification. This is explained below.

Sustainability certification

The shrimp-farming sector, particularly in Asia, has received negative attention in Europe in the past decade. Negative impact on communities and the environment by the shrimp sector has been criticised. One of the results is the trend that eco-labelled seafood products (or: sustainably certified products) have quickly gained market share in several European markets in recent years. Countries in Western and Northern Europe (such as the Netherlands and Germany) are the leading markets for eco-labelled seafood. In the Southern and Eastern markets of Europe, eco-labelling still plays a limited role.

The following sustainability standards for shrimps in Europe are most relevant:

- Friend of the Sea (FOS): FOS is an Italy-based fisheries and aquaculture certification scheme. Eight Vietnamese companies have certified black tiger shrimp operations. Also, two farms in Indonesia are FOS-certified.
- The shrimp certification of Aquaculture Stewardship Council (ASC), a non-profit organisation that stands for responsible aquaculture, started in 2014. The first ASC certified black tiger shrimp became available in the Scandinavian market at the end of 2014. Other countries in northern and western Europe followed in 2015 and ASC is expected to gain in importance in other parts of Europe too in the long term. Therefore, it is good

to invest in this upcoming standard. So far, there are not more than 5 black tiger farms with ASC certification (four in Vietnam and one in Madagascar).

Tips:

As a supplier, you need to invest in transparency and sustainability to enhance your potential in Europe. Work on special activities in your country to support the communities and environment. Include these activities in your market strategy.

In addition to transparency and sustainability, reliability is of utmost importance to European companies. Focus, for instance on quality and delivery time.

If you are interested to sell ASC black tiger, discuss with your buyer whether a premium can be paid or calculate if you can produce ASC black tiger cost-neutral. For more information about ASC standards and certification, check the [ASC website](#) and the [ASC accelerator](#) support program.

Find out more about shrimp farms that are already certified by FOS on the [FOS website](#).

Relevant sources that may be helpful for you in gaining access to the European market are: [EU Trade Helpdesk](#) to find information related to European requirements, tariffs, statistics and preferential arrangements and the [ITC Sustainability Standards Map](#) for standards related to sustainability. <http://www.standardsmap.org/>

The [Sustainable Fish Platform](#) (copy this link and paste in your browser) offers a good starting point for getting an overview of sustainable fish production, also for Asian shrimp in particular.

Common requirements

For black tiger shrimp and other seafood, additional requirements are mainly requirements with respect to food safety. The most commonly requested food safety certification schemes for seafood products are [International Food Standard](#) (IFS) and (or) [British Retail Consortium](#) (BRC), and sometimes also [GLOBALG.A.P.](#)

Tips:

ITC offers fact sheets on the several certification schemes, such as on [IFS](#) or [BRC](#).

See our [10 tips for doing business with European buyers of fish](#) and seafood and our [10 tips for finding buyers in the fish and seafood sector](#). These tips also offer more information on which topics are decisive for European buyers when searching for (new) suppliers.

5. Through what channels can you get black tiger shrimps on the European market?

Developing Country exporters of black tiger shrimps have two main options for entering the European market: 1) agent and 2) traders such as importers, processors and wholesalers of black tiger shrimps. See our study [Market Channels and Segments for Frozen Fish and Seafood](#) for a general overview of channels.

Large black tiger importers have their own quality agents at origin to check the quality of the shrimp products. These checks can be a final inspection at the end of the production chain or monitoring throughout the process. Importers will continue to visit your factory before they sign contracts but will make use of a local agent to

assure quality and manage their risks.

Imported fishery products enter Europe either by ship or by airfreight. Frozen cultured tiger prawns are mainly transported by ship. Important ports in Europe are Antwerp (Belgium), Rotterdam (the Netherlands), Hamburg or Bremen (Germany), and Marseille (France).

Tips:

It is an advantage to be transparent about your operations, from sourcing to processing. Give your buyer the possibility to influence and monitor the overall production process. Co-production is becoming more common and may increase your business opportunities.

Try to invest in a product that is suitable for selling in supermarkets. Take a look at a product assortment of a supermarket through their websites.

If you are aiming to supply your products to the retail segment in Europe, find out which large import and wholesale companies trade with large retailers in Europe. Large companies that supply to the retail segment include [Deutsche See](#) in Germany, [Galana](#) in Belgium or [Heiploeg](#) in the Netherlands.

Make use of matchmaking services such as [Seafood Trade Intelligence Portal \(STIP\)](#).

6. What are the end market prices for frozen shrimps and prawns?

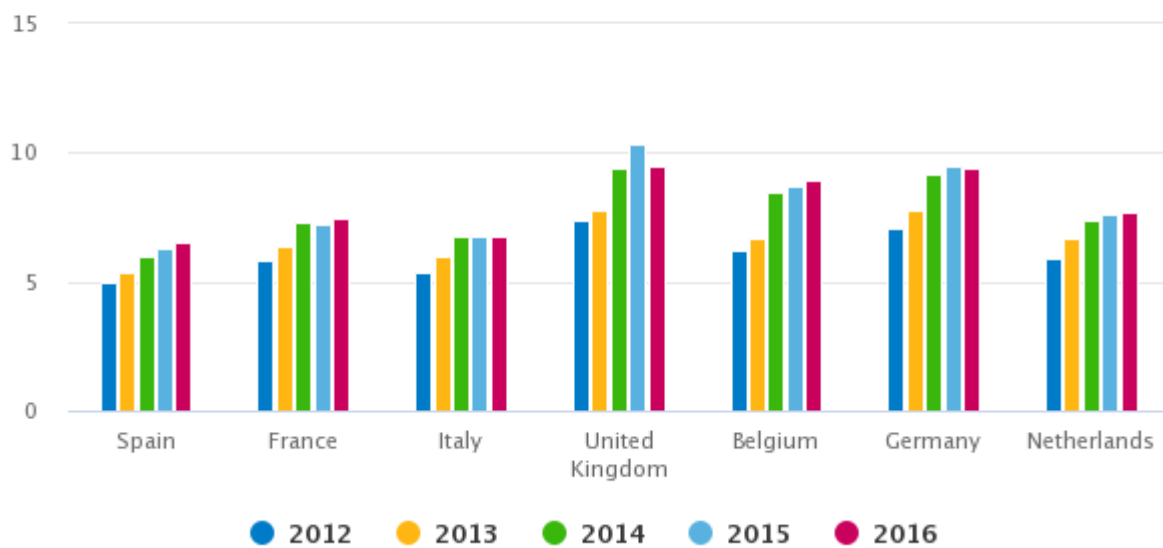
Figure 4 shows the average shrimp price levels and development for main importing countries in Europe. The average import price of frozen shrimp and prawns in southern European countries (Spain, Italy, and France) was €1.98 lower than in northern European countries (Belgium, United Kingdom, Germany and the Netherlands) in 2016.

United Kingdom (€9.53) paid the highest average import price per kg in 2016, closely followed by Germany (€9.43). With an average price of €6.48 per kg, Spain had the lowest import price of European countries in 2016.

Countries like Spain, Italy, and France import cheaper raw *L. vannamei* material, mostly HOSO, as a source for their domestic shrimp cookeries, while northern Europe imports more cooked or peeled shrimps. The average import price in Europe in 2015 and 2016 was €7.50 and €7.40 respectively, which was little higher than the €7.30 in 2014. This shows that there is more or less balance between demand and supply.

Figure 4: European import price per kg of frozen shrimps and prawns 2012-2016

in euros per kilogram



Source: Trademap 2017

Consumer prices of black tiger shrimps' products in the different European countries give you an impression of the price level in Europe.

Table 1: Examples of prices for black tiger shrimps' products in Europe

Product	Price (€/kg)	Country
Frozen raw black tiger prawns	15.77 - 29.90	United Kingdom, France, Belgium, Spain
Frozen raw black tiger prawns (8-12 pieces in a box of 800 gram)	26.86 /26.99	Germany
Frozen raw and peeled black tiger prawns	17.66	United Kingdom
Frozen raw and peeled black tiger prawns (13-15 pieces in a box of 800 gram)	26.36	Germany
Frozen raw black tiger shrimps without heads	29.90	Germany
Cooked and peeled black tiger prawns	39.32	United Kingdom


Cooked black tiger prawns	24.88 - 29.85	Spain, Belgium
Fresh black tiger prawns in plastic container	33.90	Belgium
Baked tiger prawns	23.98	Spain

Source: Globally Cool, 2016


The margins in the value chain vary a lot from low end to high end products. For low end products, margins can be as low as 5% for each company, with a retail margin as low as 10%. For high end products, these margins can be as high as 20-25% for fishermen and processors, and 100% for importers and retailers.

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