

What is the demand for fish and seafood on the European market?

If you are looking to find a buyer for your fish and seafood products, Europe is one of the major markets to look at. Do not, however, mistake Europe for a single market. It is a diverse group of countries with separate but interrelated markets. Success in Europe depends on an understanding of the needs of the different target markets and audiences. In the context of a pandemic such as COVID-19, however, it is difficult to offer solid predictions or conclusions yet. This study aims to look at the recently recorded statistics.

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1. What makes Europe an interesting market for fish and seafood?

While there is still a lot of uncertainty looking forward, due to the impact of the pandemic both in sourcing countries and the main markets in Europe, Europe remains a major market for fish and seafood from developing countries. On top of a diverse range of consumption behaviour, many major European importing countries are also seafood processors that process more than they can produce, so they import raw material. In the next sections, we will explain the potential export opportunities in Europe as well as some insight into the challenges that lie ahead.

Europe likes fish, Southern Europe loves fish

The latest data published by EUMOFA in 2019 is data from the 2017 study, in which per capita consumption was recorded at 24.3 kg, with wild-caught species accounting for three-quarters of this. On average, Europeans consumed just over half a kilo less of fish and seafood than in 2016, when per capita consumption was at 24.9 kg. Total consumption of fish and seafood in Europe amounted to 12.77 million tonnes.

EUMOFA is the [European Market Observatory for Fisheries and Aquaculture Products](#), an initiative of European Union Commission - Directorate-General for Maritime Affairs and Fisheries (DG MARE). EUMOFA industry experts and analysts monitor and interpret daily market data.

Europe is a diverse market with different consumption patterns, ranging from its highest per capita consumption in Portugal at 57 kg (double the European average), to 5.2 kg per capita in Hungary. Looking at the graph below, you will see that most of the top seafood consuming countries in 2017 are from Southern Europe, namely Portugal, Spain, Malta, France and Italy. The main products consumed are tuna (mostly canned), cod, salmon, Alaska pollock, shrimp, mussel and herring (EUMOFA, 2019).

Tips:

Read chapter 3.1 of EUMOFA's 2019 Fish Market Report, which is based on [a survey of 28,000 European consumers and reports on country-wide fish and seafood consumption](#).

Check out the EUMOFA Monthly Highlights if you want [up-to-date information on specific countries or specific species](#).

Visit retailer websites in several European Union countries to better understand what consumers are eating in different countries. Check, for example, [Albert Heijn](#) in the Netherlands, [Alcampo](#) in Spain

and [Carrefour](#) in Belgium.

Use [Google Translate](#) if you are trying to access a company website linked in this study and the website is not available in a language you are familiar with. Companies that you might be interested in may only have their websites translated into the languages that they use most often.

Impact of COVID-19

Many major seafood-consuming European countries, such as Italy, France and Spain, have been hit by COVID-19. While the virus originated in China at the end of December 2019, it has since rapidly spread to Europe. By March 2020, the World Health Organization called Europe the “new centre of the pandemic.” As countries impose lockdown measures, restaurants, hotels and the food service sector in general have closed down.

Importing countries and companies are struggling financially, as many businesses close down or face insecurity. As a result, in March and April, many importers cancelled, postponed or reduced orders. Transportation is also a major concern, especially for orders from non-European countries as many borders are closed. In the next section, we will talk about Europe’s 2019 imports.

The seafood processing sector, particularly in Spain, Italy and France, has been also affected, as factories reduce their working capacity due to social distancing measures. This has an effect on the imports of raw material of seafood, such as tuna, sardines or anchovies, from exporting nations.

[The retail sector saw a slight increase in sales](#), mostly due to the hoarding behaviour of some consumers causing a sudden growth in purchases of pre-packed and frozen fish products (EUMOFA, May 2020).

In France, for example, the sale of fresh fish has declined, but purchases of ready-to-use and packaged fish have increased. In Italy, consumption of fish products (especially processed fish products) is increasing as people have more time to cook at home during the quarantine. [In Spain, in-store sales only account for 25% of sales, while at-home delivery is 75%, which has caused logistics costs to increase by 75%](#) according to Alimarket, a Spanish website that provides sectoral and economic information.

In this time of greater change and uncertainty, knowledge is key, so exporters from developing countries should follow industry news and keep up to date with country developments.

Tips:

Read the CBI study on [how to deal with COVID-19 in the Fish and Seafood sector](#).

Follow industry news sites like [Seafood Source](#), [Undercurrent News](#), [Atuna](#), [The Fish Site](#)- sign up to their newsletters.

Read this overview of [the immediate impact of the coronavirus crisis on the European fish processing and trade sector](#) from the [Dutch Fish Federation](#).

Follow the restrictions in your main European markets, including [France](#), [Spain](#), [Italy](#), [the United Kingdom](#) and [the Netherlands](#).

The dollar is weak, not European imports

From 2015, imports of fish and seafood into Europe was on a rise, reaching \$22.3 billion in 2018. However, 2019 showed a small dip again to \$21.5 billion. Imports from developing countries displayed a similar pattern and dropped from \$16.5 billion in 2018 to \$15.8 billion in 2019. While this may look like seafood has lost favour with European consumers, the drop in the value is more a result of fluctuations in the dollar to euro exchange rate.

In 2019, Europe imported \$9.7 billion more fish and seafood than it exported. Europe's imports from developing countries, worth \$15.8 billion, mainly consisted of exotic fish and seafood species such as tuna, reef fishes, and warm-water shrimp. Europe's exports, worth \$10.6 billion, mainly consisted of fish species such as salmon, mackerel and flatfish.

Developing countries held a market share of 73% of all imports from outside Europe (extra import) in 2019. The main suppliers to Europe from developing countries have been stable over the last years, and the top five is made up of China, Ecuador, Vietnam, Morocco and India. With a combined value of \$8 billion, they are responsible for 51% of the value imported from developing countries. The leading importers were Spain, Italy and France.

When looking only at the top five developing sourcing countries, they are responsible for only \$1.2 billion and a market share of 8%, a decrease of \$0.11 billion compared to 2018. Later in this study, we will focus on the different markets and their main suppliers.

Tips:

Look at the most recent weekly trade data via the [European Market Observatory for Fisheries and Aquaculture's market analysis tool](#). EUMOFA also presents a weekly analysis of trends and data related to the coronavirus.

Get access to [TradeMap](#) and play around with trade data yourself. It will provide you with detailed insights into the trade flows of the products that you are interested in. Fish and seafood are covered under custom codes HS03 and HS16. Registration is free for developing countries.

[Check the OECD country list](#) to understand which countries fall under the definition of developing countries, and which countries fall under the definition of least developed countries. This will help you better understand which countries are being discussed when using these terms.

Challenging times ahead will impact the trade and consumption of fish

Currently, the whole of Europe is facing difficult times due to a number of reasons: one is the COVID-19 pandemic, the second being the possible economic recession it causes, the third is Brexit. Looking at Europe's imports from the start of the year, we see that imports over January were already lower than previous years.

The total value of January's imports from developing countries was \$ 1.5 billion, a drop of 8.2% compared with 2019. The main countries which showed a drop were China and Vietnam, countries such as Bangladesh and Madagascar were able to increase their exported value to Europe in January 2020. Looking forward, both the supply and demand have been heavily disturbed by the COVID-19 crises, as both sourcing and purchasing countries face limitations on transport and infrastructure and difficulties in their day to day operations.

In the second half of 2020, market segments, other than retail, which is still open, are expected to slowly continue reopening. At the beginning of May, for example, it was once again possible to buy take away from the food service industry in Italy, a trend which also happened in other countries in Europe. The Netherlands, on the

other hand, never closed its takeaway and delivery services and some restaurants that are usually dine-in only re-opened for takeaway and delivery.

However, purchasing power of consumers, combined with a loss of [trust in Europe's economic outlook](#) will certainly have an effect on how consumers spend their money. The European Union expects the GDP to reduce by -7.4% in 2020, while 2019 had an average of 1.5% growth.

To combat this, individual member states have put in place large (financial) programmes in order to keep their economies intact during the lockdowns. These involve liquidity support for firms to avoid bankruptcies, and support for workers to ease the pain of income losses and avoid a surge in unemployment. To maintain or find access to the European Union market and overcome the challenges, it is advised to recognise the trends that emerged during this crisis and find your opportunity.

Tips:

Read more about [the continuing trends of European fish and seafood consumption, and those created by COVID-19](#), in the CBI trends study.

Be aware that each year, the ATQ (autonomous tariff quotas) gets refreshed, meaning that until that year's volumes have been used, all trade between the European Union and developing countries is tariff free. Read the CBI Buyer Requirement study [to learn more about the ATQ](#).

Brexit

The United Kingdom left the European Union on 31 January 2020, after the country's citizens voted in a referendum in 2016. An 11-month transition period began on 31 January. England is in the process of negotiating with other trade partners, regardless if those countries have existing deals with the European Union. The trade deals being negotiated could reduce the taxes put on traded products and give an advantage to exporters from countries with trade deals in place. However, the success or failure of these negotiations remains to be seen.

Currently, the United Kingdom has successfully made deals for just over eight percent of its total trade, according to the British Broadcasting Corporation. Negotiations, though slowed by the COVID-19 crisis, are expected to pick up in speed through the end of the summer and until Brexit is finalised, at the end of 2020.

Brexit will be important to watch for a number of reasons. If the United Kingdom is your main market and your country has not already negotiated a trade deal with the United Kingdom, once separation is final, existing deals with the European Union will no longer be in effect. Also, if your competitors negotiate new deals with the United Kingdom, it could give them an advantage in accessing the markets.

Tips:

Read the CBI news piece on the effects of Brexit on trade. [\[BA\(1\)\]](#)

[Stay up to date on any new tariffs that are added](#), you can find them on the Seafish website (a governmental organisation in the United Kingdom concerned with seafood trade).

The United Kingdom is a market on its own. If and when possible, and in consideration with the COVID-19 measures in your country of origin, visit British fishmongers, supermarkets and potential buyers in London or any other major city to get a better understanding of the market. Consider a virtual tour, if travel is hard or impossible.

Stay up to date on the deals around Brexit by reading the updates of Seafish. Check the Seafish website, which offers a large amount of data, studies and overviews of the industry.

2. Which European markets offer the most opportunities for fish and seafood

Since the start of 2020, the COVID-19 pandemic has been particularly hard on the food service industry, closing bars and restaurants, first in the south of Europe, followed by the north of Europe. It has also closed food markets, events and other large gatherings of people. Seafood sales via these segments have dropped drastically. With the European food service industry closed, European importers had a high level of inventory due to the low market demand.

Southern Europe: Europe's biggest consumer and producer

Southern Europe represents the biggest opportunity in terms of exporting your seafood products. Apart from the high seafood consumption rate in this block, Spain, Italy and France are also the major processing nations in Europe. Southern Europe consists of countries along the Mediterranean Sea. In this study, Southern Europe consisted of five leading importers, which are Spain, France, Italy, Portugal and Greece.

Overall, Southern Europe imported \$9.3 billion worth of seafood products from developing countries, which represents 82% of its total imports from outside the European Union (\$11.4 billion). Four product groups dominate Southern Europe's imports from developing countries. These consist of molluscs (mainly squid and cuttlefish) at \$2.3 billion, crustaceans like shrimp at \$2.1 billion, prepared and preserved fish such as tuna loins and canned tuna at \$1.8 billion and fish fillets such as pangasius at \$1.1 billion.

Spain, Italy, France, Portugal and Greece are the Southern European countries that import the most from developing countries. In 2019, Southern Europe's imports represented 60.2% of Europe's total imports from developing countries. Spain lead the pack at \$4.4 billion, followed by Italy at \$2.2 billion and France at \$1.8 billion.

In 2018, most Southern European countries exhibited growth in import value from developing countries. However, in 2019 (as shown in the graph) the top four countries saw a decrease. Spain's import value fell from \$4.7 billion in 2018 to \$4.4 billion in 2019, representing a 6% decline, while Italy and France both saw an 8% decline during the same period. Though changes in exchange rates have influenced this decline, it was also visible in the euro values for the imports. In euros, Spain's values dropped by 1.6%, France by 3.2% and Italy by 3.8%.

Spain, which has a huge processing industry, mostly focuses on the molluscs, crustaceans, and canned fish (tuna and mackerel). Remember that Spain is an important market because it further processes and re-exports large amounts of fish and seafood. Italy is also a major player with a large appetite for anchovies and tuna, while France is focused on importing shrimp, molluscs and canned fish such as sardines and tuna. Like countries in Northwestern Europe, France also prioritises sustainable seafood and is Europe's largest market for organic shrimp.

In 2019, the top two largest suppliers to Southern Europe were Ecuador (\$1.16 billion), which mainly supplies tuna and shrimp, and Morocco (\$1.12 billion), which mainly exports molluscs. Other huge suppliers of seafood to Southern Europe are China (\$893 million), Argentina (\$679 million) and India (\$466 million).

As Southern Europe's processing industry has also been affected by COVID-19, particularly in Spain and France,

we expect the imports in the first half of 2020 to have further declined, with market recovery only expected to begin in the second half of the year.

Tips:

Check out ShrimpTails magazine's COVID-19 edition, which was released in April, to [see how Southern Europe's shrimp trade was affected](#).

[Visit the Conxemar fish and seafood expo](#) in Vigo, to network with buyers from throughout the region and world. Currently, this is planned on 6-8 October 2020, but make sure to stay up to date on any possible changes due to COVID-19 restrictions.

[Subscribe to the Conxemar magazine](#). For a digital subscription of only \$45 a year, get a better understanding of the situation in the Spanish and broader Southern European fish and seafood industry.

Be sure to have an interpreter with you, if you go to Southern Europe and you do not speak the local language.

Check out the product fact sheets for [squid and cuttlefish](#), [canned fish](#) and [Pacific white shrimp](#) to find more detailed descriptions of major Southern European countries.

Northwestern Europe: Consumers and traders

Besides Southern Europe, there is also much opportunity in Northwestern Europe. Northwestern Europe, in this study, includes top importing countries like the Netherlands, Belgium, Germany and the United Kingdom. Overall, Northern Europe imported over \$5 billion worth of seafood products from developing countries, which represents 72.4% of its total imports from outside the European Union (\$6.9 billion).

Northwestern Europe imported a total of \$5.1 billion from developing countries in 2019, representing 32% of Europe's total imports from developing countries. The United Kingdom and the Netherlands were the top two importers from developing countries, with a total import value of \$1.54 billion and \$1.52 billion respectively. Compared with 2018, these values have shown an increase of 2% in the United Kingdom and 1% in the Netherlands.

The next largest importers are Germany and Belgium. Remember that the Netherlands, Germany and Belgium are trading nations, so consider doing business with them if you want to establish a connection to the rest of Europe. In these countries, keep in mind that an increase in imports does not necessarily translate to an increase in consumption in the country.

As mentioned above, the United Kingdom has already left the European Union after a referendum, but it will remain part of the union in terms of international trade until the end of 2020. It is a country that has its own importers and supply chains, so if you were doing business in the United Kingdom before, it is important to know what Brexit means for you.

If your products get to the mainland European market through companies that are based in the United Kingdom (or the other way around), you may find that your product will be subject to extra costs such as additional checks and regulations, making your products less competitive.

Three main product groups are imported by Northwestern Europe from developing countries, which includes fish fillets and other fish meat (\$1.5 billion), crustaceans (\$1.2 billion) and prepared and preserved fish such as

canned tuna (\$1.07 billion). In 2019, Northwestern Europe imported 22% of all its seafood products, that came from outside of Europe, from developing countries.

The main supplying markets to Northwestern Europe are China (\$1.1 billion), Vietnam (\$815 million), India (\$379 million) and Ecuador (\$371 million). China is the largest supplier of reprocessed frozen fish fillets, Vietnam the largest supplier of shrimp and frozen fish fillets, India the second largest supplier of shrimp, Ecuador, the largest canned tuna supplier, and Turkey is a large supplier of fish fillets.

Note that when the pandemic (COVID-19) hit, it had a huge impact on importers and traders, made worse by logistical and supply challenges in sourcing countries. There was a large volume of inventories and goods moving slowly. The food service sector in Europe was shut down and businesses were severely hit. Countries in this region started to reopen their food service industries in June, but with social distancing measures. It is likely that it will take some time before the food service sector recovers.

Tips:

Read the trends study to [find out what has changed in the European market recently in terms of its seafood consumption and purchasing behaviour](#).

Check out ShrimpTails magazine's COVID-19 edition, which was released in April, to see [how Northwestern Europe's shrimp trade has been affected](#).

[Keep up to date on the economic outlook and consumer trust](#) by reading the updates from the European Union.

Visit [The Seafood Expo Global](#), which has been moved from being held in Brussels, Belgium to Barcelona, Spain, every year in April or May, to meet buyers from all over Europe and the world; the bi-annual [Fish International in Bremen](#), Germany, to meet German importers, wholesalers, retailers, as well as suppliers to the German market from across Europe and, in the Netherlands, visit the [PLMA International](#) in Amsterdam, the biggest retail-focused Private Label show in Northwestern Europe, taking place each year in May, to meet with retailers and their suppliers.

If you attend these events, schedule a programme that includes a visit to stores and companies in the area to learn more about how your products and those of your competitors are packaged, marketed and sold.

Most Northwestern European importers are united in associations. Through the association websites, you can find most of the importers in each country. Examples are the [Dutch Fish Importers Association](#) and the [German Seafood Verband](#).

Eastern Europe: a smaller, but growing, market

Eastern Europe consists of a group of 11 countries: Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia. The biggest markets in Eastern Europe are Poland, Czech Republic, Romania, Croatia and Estonia. Together, they import a total of \$458 million worth of seafood from developing countries. Overall, Eastern Europe import \$550 million worth of seafood products from developing countries, which represents 52% of its total imports from outside the European Union (\$1 billion).

Poland, the largest importer from developing countries in Eastern Europe, has seen a 12% increase in the value of imports from developing countries, in 2019, amounting to \$281 million (from \$250 million in 2018). Poland accounts for almost 50% of Eastern European imports from developing countries. However, the Czech Republic (up by 18%) and Croatia (up by 16%) also saw an increase in direct imports in 2019. While their imports are not

too significant compared to other European countries, their steady increase is promising.

Eastern Europe's imports from developing countries mainly consist of frozen fish fillets, worth \$292 million (mainly Alaska pollock and hake), prepared and preserved fish (mainly tuna) at \$104 million and crustaceans (mainly shrimp) at \$48 million.

Eastern Europe's main suppliers from developing countries are China (Alaska pollock and salmon fillets), Vietnam (shrimp and pangasius), Ecuador (tuna), and Argentina (hake). China was the only country to export more than \$100 million to Eastern Europe. The remaining four countries exported between \$25 and \$60 million each.

We expect that Eastern Europe's import of fish and seafood is likely to continue growing, along with the broader acceptance of seafood as part of daily protein. However, as the block enters economic difficulties due to COVID-19, it is difficult to tell how this could affect the overall purchasing behaviour of Eastern Europeans. Eastern European countries such as Czech Republic, Slovakia or Hungary were some of the first ones to enforce strict lockdown measures to contain the spread.

In a prediction by the European Bank for Reconstruction and Development (EBRD), Eastern Europe could benefit from the shifting supply chains post-COVID-19, as more European companies make their businesses less dependent on China. For developing country exporters, this could be an opportunity to monitor as Eastern European countries slowly recover. The EBRD expects the economies of Central Europe and Baltic states to collectively shrink 4.3% this year, but they could bounce back with a 4.5% expansion next year.

3. Which products from developing countries have the most potential on the European fish and seafood market?

The most important product groups that Europe imported in 2019 are HS0306 (crustaceans), HS1604 (prepared and preserved fish), HS0307 (molluscs) and HS0304 (fish fillets and other fish meat). Together, they represent over 80% of total import value. Within these groups, the most important products are shrimp, tuna, cuttlefish and squid, and a broad variety of fish fillets.

Import value of seafood commodities have dropped from \$15.8 billion in 2018 to \$15.1 billion in 2019. The slight decrease in value mainly affected HS0306 (crustaceans), HS0307 (molluscs) and HS0304 (fish fillets). In the next section, we will dissect each segment.

As mentioned earlier, since the beginning of 2020, the world has been facing problems stemming from the COVID-19 pandemic. What is important to note is that with the pandemic hitting major markets and sourcing countries, consumption and purchasing behaviour has changed.

Sourcing countries that were badly hit only began recovery in April, when processing factories started production again. In the long term, production volumes could also take a hit as farmers hold off stocking as they do not foresee demand picking up soon.

Demand in the major markets increased for products that are more convenient to cook and use in the household, however. While there is no data available yet, we expect an increase in the purchase of frozen seafood, as well as prepared and processed products, as consumers become less comfortable buying fresh products in the market.

Tip:

Read the CBI Trend study for [more details on changes in buying behaviour and other COVID-related trends](#).

0302. Fish, fresh or chilled (excluding fish fillets and other fish meat of heading 0304)
0304. Fish fillets and other fish meat, whether or not minced, fresh, chilled or frozen
1604. Prepared or preserved fish; caviar and caviar substitutes prepared from fish eggs
0306. Crustaceans, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine, . . .
0307. Molluscs, fit for human consumption, even smoked, whether in shell or not, live, fresh, chilled, . . .
0303. Frozen fish (excluding fish fillets and other fish meat of heading 0304)
0305. Fish, fit for human consumption, dried, salted or in brine; smoked fish, fit for human consumption, . . .
1605. Crustaceans, molluscs and other aquatic invertebrates, prepared or preserved (excluding smoked)
0301. Live fish
0308. Aquatic invertebrates other than crustaceans and molluscs, live, fresh, chilled, frozen, dried, . . .

Crustaceans

Crustaceans comprises 24% of Europe's total imports from developing countries, totalling up to \$3.7 billion. Of Europe's total crustacean imports, about 87% is sourced from developing countries. Crustaceans exported to Europe from developing countries include a variety of frozen products. The most important of which are warm water shrimp (95%), rock lobsters (2.5%) and crab (1%).

Most of the crustaceans that European countries purchase are frozen warm water shrimp (\$3.5 billion). Warm water shrimp includes all kinds of shrimp, but the vast majority is Pacific white shrimp from India, Vietnam, Indonesia and Ecuador. Another warm water shrimp species that is exported to Europe in large quantities is black tiger shrimp, which is mainly sourced from Bangladesh, Vietnam and Madagascar.

There are two main ways that Pacific white shrimp gets to the European market. They either go to retail or food service, where they are cooked and eaten, or they go to processors, where they are further prepared before sale.

All European countries import peeled Pacific white shrimp products. Mainly from India and Vietnam. Pacific white shrimp is not only imported under the category of crustaceans (HS0306), but also under the category of prepared and preserved crustaceans (HS1605). The Pacific white shrimp imported as prepared and preserved has undergone at least two processing steps. For example, the product is cooked and peeled. Prepared and preserved shrimp represents about 23% of Europe's total warm water shrimp imports.

With regards to the re-processed shrimp products, Southern European processors in Spain, France and (to a certain extent) Italy purchase head-on shell-on shrimp from Ecuador and several countries in Central America. They cook the shrimp in their facilities in Europe and sell their products as cooked, refreshed products in their internal markets.

Black tiger shrimp is regarded by Europeans as a premium shrimp compared to Pacific white shrimp. Its major market is in Northwestern Europe and in France. If destined for the wholesale market, it is often sourced from Bangladesh. If it is sourced for retail, it is often from Vietnam and Madagascar.

Besides shrimp, other species in the crustacean category are rock lobster and crabs. Rock lobster imports from developing countries were \$78 million in 2019, while frozen crabs were worth \$49 million. These also mostly go to the foodservice industry.

Depending on the destination market, imports might recover in the near future after the current stock in the cold storage is consumed. If raw material prices become low at the origin due to the low global demand, this might assist in the recovery of import volumes. A potential issue that might occur is that, with declining raw material prices at the origin and a higher-priced stock inventoried in Europe, there might be a price correction as the market picks up demand again. This might further delay the recovery of imports.

Tips:

Check the CBI fact sheet on [warm water shrimp](#), [black tiger shrimp](#) or [crab](#) for detailed information on the market potential of these products. For crab exporters looking to get into the European market, remember the catch period for crabs (May to October). In this period, the supply in the market can be very high and thus demand for imported products can be low. However, towards the end of the year (holiday season), the demand usually picks up and this could be an opportunity to sell.

Check the [European Federation of National Organisations of Importers and Exporters of Fish \(AIPCE-CEP\)](#) and the [Seafood importers and Producers Alliance \(SIPA\)](#) to find importers that you can contact for your products.

[Subscribe to the online magazine ShrimpTails](#). It is a free quarterly publication with market updates for Southern and Northwestern Europe that look three months back and forward to see how the European shrimp market is doing.

Study the websites of some of Europe's major shrimp importers to get a better feel of the types of products being imported. Check the websites of re-processors [Gambafresh](#), [Krustanord](#), [Heiploeg](#) and [Dutch Seafood Company](#), who supply refreshed products. Check the website of companies like [Seafood Connection](#), [Escal](#), [Hafo](#) and [Hottlet](#), who only supply frozen products.

Prepared and preserved fish

Prepared and preserved fish is the second largest product type that Europeans consumed in 2019, next to crustaceans. And understandably so, since consumers want to eat simple, ready-to-eat and convenient food. With the increasing demand for processed seafood, the global canned fish market is rising. In 2019, Europe purchased a total of \$3.3 billion worth of prepared and preserved fish from developing countries, which was slightly higher than the value imported in 2017, reported at \$3.1 billion.

It is important to remember that, although this segment consists of varied species and products, tuna is king among them all. Tuna comprises 76.1% of all prepared and preserved products imported to Europe by developing countries, equivalent to \$2.5 billion. This consists of, of course, canned tuna, but also tuna loins (pre-cooked and frozen), which are usually used as raw material for the European canning industry.

Europe's tuna canning industry is concentrated in Southern Europe, particularly in Spain, Italy and France. Spain leads Europe's production of canned seafood with more than 343,000 tonnes of product weight produced, valued at €1.5 billion. Spain produces 70% of the canned tuna processed in Europe.

Next to tuna loins and canned tuna, the main seafood species consumed in this segment are prepared and preserved anchovies (\$211 million), sardines (\$189 million) and mackerel (\$25 million). Among these species, tuna would be your best bet. Not only is it the largest consumed species in Europe, but Europe also, historically, feeds a large part of its hunger for tuna by importing it from non-European countries.

Non-European suppliers deliver 64% of the imported volume of canned tuna, mainly from Ecuador, Seychelles, Philippines, Mauritius and Ghana. Meanwhile, 60.5% of canned sardines imported in Europe are produced by non-EU suppliers (mainly Morocco). Non-EU countries supply 79% of the canned anchovies imported in Europe, with Morocco taking 59% of the total market share among non-European Union suppliers. European suppliers, however, provide 83% of the canned mackerel to European producers.

Tips:

Learn more about the European market for frozen and prepared tuna loin as an input for the canning industry, reading the CBI product fact sheet on [Europe's most consumed marine species](#).

For a separate study on Europe's canned fish imports, check out this CBI factsheet on [prepared and preserved tuna, sardines, anchovy and mackerel](#).

Squid, Cuttlefish and Octopus

Molluscs, such as squid, cuttlefish and octopus, are a major product exported to Europe from developing countries. The way imports of these species are reported in European trade data changed from 2016 to 2017, which makes it difficult to look at the longer-term trends.

In 2019, the major exporters of molluscs were Morocco (\$670 million), India (\$345 million), Mauritania (\$301 million), China (\$298 million) and Peru (\$297 million). In Southern Europe, the largest market for exports, the above countries dominate the trade. Other countries, however, such as Senegal, Thailand, Argentina, South Africa, Indonesia and Vietnam, also export to Southern Europe.

Squid, cuttlefish and octopus (HS0307) accounted for 50% of total European imports of molluscs from developing countries in 2019. While the imports in 2019 (\$2.6 billion) were lower than in 2018 (\$3 billion), this is a segment that developing countries dominate.

Southern Europe represents almost 88% of Europe's total import value for squid and cuttlefish from developing countries. Southern Europe sources 59% of its imports from developing countries, purchasing \$2.3 billion worth of products out of the total import value of \$3.9 billion.

For frozen octopus, specifically, Europe imports mostly from Morocco (\$381 million) and Mauritania (\$203 million), with some smaller values imported from Senegal, Indonesia and Mexico.

Tips:

Make sure that your website is available, and you have sales representatives who can speak the most spoken languages in your target markets. In this case, the two dominant markets in Europe are Italy and Spain.

If you are already doing business in Spain or Italy and are looking for new markets in Europe, find out which importers in Spain and Italy are selling squid, cuttlefish and octopus to other European countries.

Check [Globefish's cephalopod's market reports](#). These quarterly publications are a reliable source of information to stay up to date about the situation in the global market for squid, cuttlefish and octopus.

Stay up to date with CBI reports. Expect a new squid and cuttlefish report at the end of 2020.

Frozen fish fillets

In 2019, Europe imported 64% of its fish fillets from developing countries at a total value of \$3.2 billion out of \$5 billion imported from the world. Contrary to most of the other imported fish and seafood, the main destination

for fish fillets is not Southern Europe, but Northwestern Europe.

In 2019, according to data from TradeMap, Northwest Europe imported \$1.5 billion worth of fish fillets from developing countries, higher than imports of Southern Europe, which was reported at \$1.1 billion. Northwestern Europe's imports have already increased from \$1.3 billion in 2017 to \$1.5 billion in 2019.

Looking at Europe's imports of fish fillets, the most important species are hake, cod, Alaska pollock, salmon and a group of species that are not defined in customs data. Most of these fish fillets are not fully processed in the country where they are produced. Salmon is produced in Chile and Argentina and Alaska pollock is produced mainly in the United States and Russia. Primary processing is done at origin, the fish is exported to China or other re-processing locations, defrosted, filleted, re-frozen and exported to its final markets.

Exotic species such as pangasius, tuna, barramundi, grouper, tilapia, flat fishes, and Nile perch may have a lower total import value but might be a better opportunity for you, if you aim to export directly to Europe. These products are often sold directly to the European wholesale market, rather than going through China.

Some of these species are exported to Europe in considerable quantities. The European market for pangasius fillets, for example, was valued at \$233 million in 2019. The main markets for pangasius are in the Netherlands, Germany and the United Kingdom. With global competition for pangasius increasing, importers in Europe may be open to source from new origins. Meanwhile, tilapia (valued at \$51 million in 2019) has dropped in value compared with 2014 levels (\$78 million). Tilapia has difficulty competing with cheaper alternatives such as pangasius and Alaska pollock.

Many other species of fish fillets also find their way to the European market. The species of fish that are sold as fillets and might be relevant to you include tuna, swordfish, and various reef fishes (barramundi, grouper, snapper), but the market for these products is scattered. Unlike pangasius, tilapia and Nile perch, which are largely sold in the retail market, the other species are mainly sold in Europe's food service and wholesale business.

Tips:


Read the CBI reef fish study to get a better understanding on the [opportunities for these species on the European market](#).


Read CBI's [tips for finding European buyers](#), [tips for organising your exports to Europe](#) and [doing business with Europeans](#) to get a better understanding of what your European (potential) customers expect from you.


This study has been carried out on behalf of CBI by [Seafood Trade Intelligence Portal](#).

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