

The European market potential for farmed black tiger shrimp

Last updated:
23 March 2022

Over the last five years the market for black tiger shrimp has changed. While it used to be a mainstream product in the retail and food service industry, its markets have shifted, making it a niche product. The main reason for this shift is the broader availability of Pacific white shrimp, which has a better price competition. Another factor is the shift in demand for more sustainable certified seafood, which not all black tiger products can fulfil. However, black tiger shrimp is often recognised as a premium product because of its distinctive colour, taste, texture and bigger size and therefore is often demanded in niche markets.

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1. Product description

Black tiger shrimp (*Penaeus monodon*) is part of the *Penaediae* family. Contrary to the Pacific white shrimp, black tiger is native to Southeast Asia and Africa. However, most Southeast Asian countries switched to farming Pacific white shrimp in the late 90's due to disease, and producing black tiger shrimp became less popular. Black tiger shrimp is available in wild-caught and as farmed varieties. This product fact sheet focuses on the market for farmed black tiger shrimp. The European market for wild-caught shrimp, including wild-caught *Penaeus monodon*, which is normally referred to as sea tiger, is discussed in our [wild-caught shrimp study](#).

Figure 1: Freshly frozen HOSO black tiger shrimp



Black tiger shrimp is mostly imported into Europe as a final product, packed and ready to be distributed in the frozen segments of supermarkets or food service wholesale stores. Contrary to Pacific white shrimp, black tiger shrimp is rarely imported as a bulk product for Europe's domestic processing industry. There might be some exceptions, especially in the United Kingdom, but also in Northwestern Europe. Some importers have their own processing facilities to reprocess small volumes of imported black tiger shrimp blocks into refreshed products.

Where black tiger shrimp is mentioned in this report, it means farmed *Penaeus monodon* under the following [Harmonised System](#) codes, unless stated otherwise:

- HS 03061792 - Frozen shrimp of the genus *Penaeus*
- HS 160521 - Shrimps and prawns not in airtight containers
- HS 160529 - Shrimps and prawns in airtight containers

The definitions of products under these HS codes are not straightforward. The general rule is that products having undergone only one processing step, such as raw peeled and deveined products (PD) or head-on shell-on (HOSO) cooked products, are declared as HS03061792. Products that have undergone at least two processing steps, such as peeled and cooked or peeled and battered, are declared under HS160521 or HS160529. Contrary to cooking, blanching is not officially regarded as a processing step. Peeled and blanched products are still declared under HS03061792. For Europe, imports under HS03061792 are largely accounted for by Pacific white shrimp, both wild-caught and farmed. However the HS codes also include black tiger shrimp (*P. monodon*). For more information about the market for Pacific white shrimp, you can read [this study](#).

Tip:

As an exporter from a developing country, you can get [free access](#) to [Trade Map data](#). Looking up data for the black tiger shrimp relevant HS codes mentioned above will help you better understand the market dynamics.

2. What makes Europe an interesting market for farmed black tiger shrimp?

In 2020, Europe imported an estimated USD 278 million of Black tiger shrimp under the different HS-codes. In volume, Europe's Black tiger shrimp imports in 2020 totalled approximately 35,000 tonnes, 25% lower than 2019. This drop is significant and can partly be explained by the COVID-19 situation in Europe, as the foodservice sector was reduced significantly. But the amount of Black tiger shrimp has seen a downward trend over the last years as Pacific white shrimp, which is produced and traded at a lower price point, has taken over the mainstream market. Black tiger shrimp has since become a niche product in the food service and retail markets.

Figure 2: Long term imports of Black tiger shrimp under HS03061792 and HS160521/29 into the EU



Source: Eurostat modified by Seafood TIP (2021)

European consumers eat almost 25 kg of fish and seafood per capita a year. According to a recent study of the European Commission, shrimp accounts for 6% of the total European fish and seafood consumption, about 1.5 kg per person. The European Union estimates that 62% of that shrimp comes from the wild and 38% from aquaculture, of which approximately 85% to 90% consists of Pacific white shrimp and about 10% of black tiger shrimp. Black tiger shrimp, represents only a minor portion of the European shrimp consumption and is considered a niche product. As a black tiger shrimp supplier, you have a premium product that has a place in high-end and Asian wholesale markets, as well as some pockets of the retail market in North Western Europe.

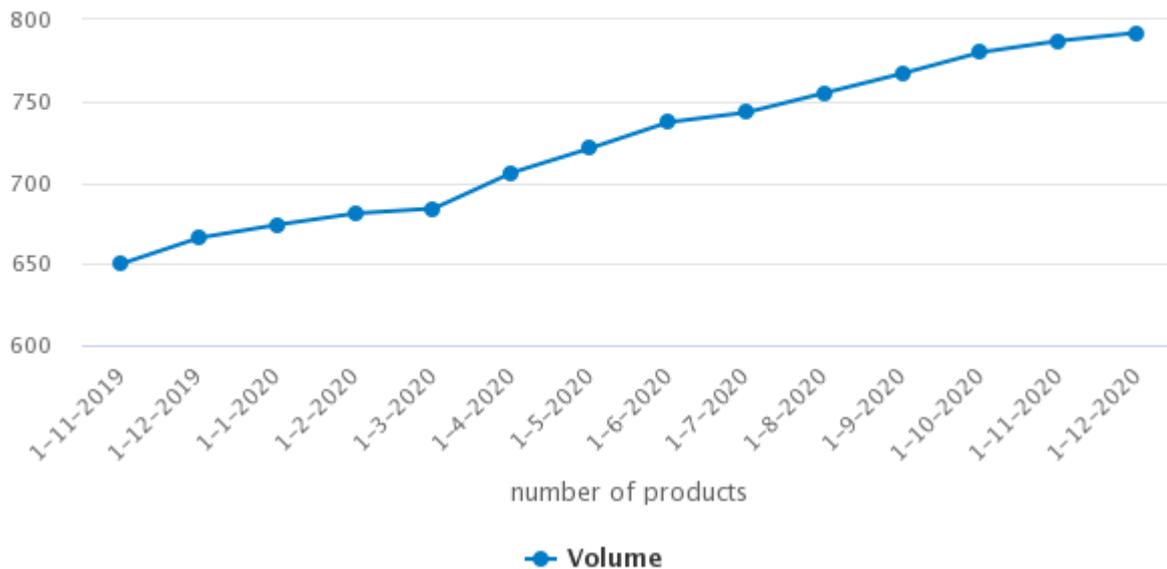
Most shrimp imported into Europe is consumed in Southern Europe. The annual per capita consumption of shrimp is almost 3 kg in Spain, 2 kg in Portugal and 1.5 kg in France. The Southern European market is historically linked to South and Central America, so it is rare to see farmed black tiger shrimp in the market there. Instead, black tiger shrimp, mainly produced in Asia and in Madagascar, is mainly consumed in Northwestern Europe and France.

Despite being a niche product, black tiger shrimp is the third most common exotic shrimp imported into the European market. Most common is farmed Pacific white shrimp at approximately US\$2 billion in import value, followed by wild-caught Argentinian red shrimp at US\$587 million. While Pacific white shrimp is popular because of its price, black tiger shrimp is chosen because of its unique colour, taste, texture and larger sizes.

Recovering demand after COVID-19

Black tiger shrimp is a niche product in the food service and retail markets. The food service sector in particular was impacted due to COVID-19. During 2020 and at the beginning of 2021 lockdowns and restaurant closures were common in many parts of Europe to combat the outbreak. During mid-2021 most countries started reopening, which meant the food service industry could also pick up again. Therefore an increase in demand can be expected in 2021 and beyond.

Figure 3: Number of ASC-certified Black tiger products available on the European market, courtesy of ASC 2021.



Source:

Furthermore, during the beginning of the pandemic frozen seafood products became scarce and companies re-packed foodservice items, such as black tiger shrimp, to make them suitable for the retail markets. As most European retailers have a commitment to ASC, this also meant a direct increase in the available number of ASC black tiger products on the European market. For you as an exporter it shows that, while black tiger is currently a niche market, it can still be a substitute for other products in the mainstream retail sector if you have the proper certification. This will provide you with a broader market spread and makes your market access within Europe more resilient.

Although we expect overall shrimp consumption in Europe to increase further in the short and long terms, for black tiger shrimp it is likely to be the opposite scenario. As prices of Pacific white shrimp continue to go down, it is likely that wholesalers and retailers increasingly choose Pacific white shrimp over black tiger shrimp. In the long term, we expect that black tiger shrimp will consolidate in a smaller niche product in the Northwestern European wholesale market, positioned as a premium product based on size, texture, colour and taste.

Tips:

To understand the position of Pacific white shrimp in the European seafood market read the CBI Fish and Seafood Market Statistics and Outlook study: you will [learn more about the consumption, demand and imports of the European market](#).

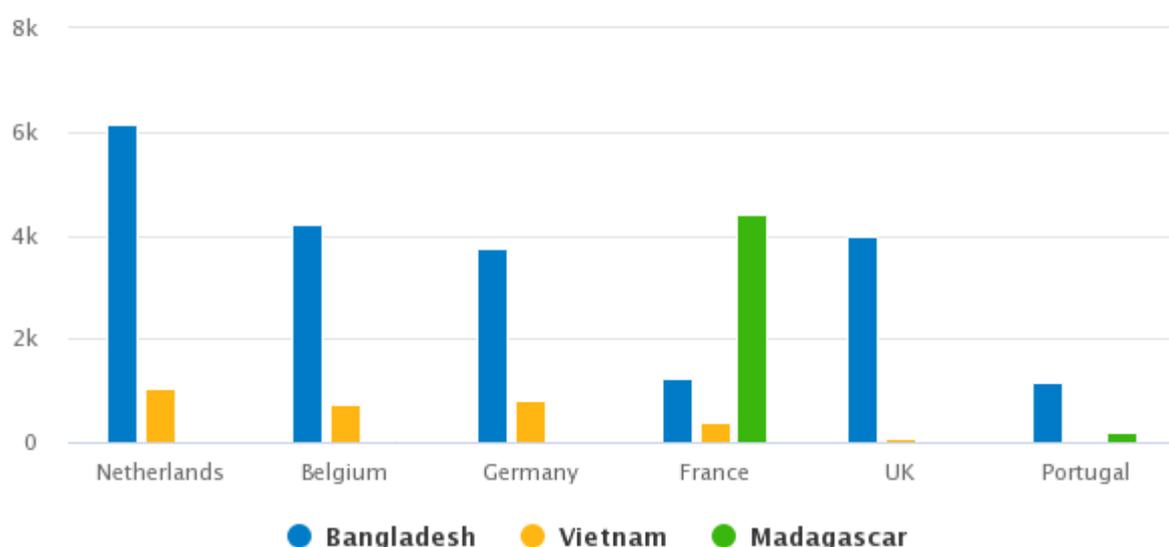
To understand the long-lasting relationships European importers foster, read the study [Tips for doing business](#).

For data about the EU seafood market and the consumption it is also possible to make use of the free

3. Which European countries offer most opportunities for farmed black tiger shrimp?

The European market for farmed black tiger shrimp is geographically more concentrated than the market for Pacific white shrimp. The Netherlands, Belgium, Germany, France and the United Kingdom are the biggest markets, and more recently joined by Portugal. In 2020, these countries combined imported US\$262 million worth of black tiger shrimp, accounting for 94% of total European imports of black tiger shrimp. The total volume between these countries reached approximately 27,442 tonnes, of which 19,213 tonnes came from Bangladesh.

Figure 4: European Black tiger shrimp import estimates during 2020
in tonnes



Source: Eurostat modified by Seafood TIP – Kontali (2021)

The Netherlands, Belgium and Germany: an interconnected group of markets

The Netherlands, Belgium and Germany are interconnected markets, as the ports of Rotterdam, Antwerp and Hamburg are strategically located for all three markets. An importer from the Netherlands may import through Antwerp, an importer from Germany might import through Rotterdam. It all depends on logistical preferences. In terms of consumption, Germany is the biggest shrimp market, followed by the Netherlands and Belgium. However, in terms of imports, the Netherlands and Belgium play an equally important role.

In 2020, these three markets imported black tiger shrimp at a total value of US\$165 million, making it by far the biggest market block for black tiger shrimp in Europe. For a long time Belgium, which has a more sophisticated culinary culture than the Netherlands and Germany, was the biggest importer of black tiger shrimp of these three markets, but Belgium's imports declined rapidly over the past couple of years. Most black tiger shrimp is now imported into the Netherlands, where it sells mainly into the Asian wholesale market or is distributed onward into Europe.

It is rare to see black tiger shrimp in the retail segment in these markets. The vast majority of the exotic shrimp assortment in the retail market consists of Pacific white shrimp. One exception is Belgium based retailer [Colruyt](#), which is known for its broad shrimp assortment and still sells a lot of black tiger shrimp besides its cheaper Pacific white shrimp offerings. If retailers still have black tiger shrimp in their assortment, it is almost exclusively sourced from Vietnam, which supplies more than 95% of worldwide available ASC-certified black tiger shrimp.

The majority of black tiger shrimp imported into these markets will be sold in the wholesale market, where black tiger shrimp is positioned as a premium product, compared to cheaper Pacific white shrimp products. With Pacific white shrimp prices going down, broadline wholesalers increasingly chose it over black tiger shrimp when the same sizes are also available. However, at the sizes bigger than 26–31 HOSO pc/kg, where Pacific white shrimp is not readily available, black tiger shrimp still is a standard item.

In Europe's ethnic Asian wholesale markets, black tiger shrimp has a stronger position than in the broadline wholesale market. Asian restaurants often favour the species and are less willing to shift to cheaper Pacific white shrimp. Especially the larger sizes of HOSO black tiger shrimp still have and are expected to maintain a strong position in Asian wholesale markets in the Netherlands, Germany and Belgium. Other black tiger shrimp products, like headless shell-on blocks and peeled products also still have good penetration in these countries.

In the Netherlands, key buyers of black tiger shrimp include [Seafood Connection](#), [Dayseaday Fisherman's Choice](#) and [W. G. den Heijer](#). In Belgium, some of the key buyers of black tiger shrimp include [Hottlet Frozen Foods](#), [Thalassa](#) and [Solea International](#). In Germany, black tiger imports are dominated by companies like [Anduronda](#), [Lenk](#), [Hafro](#) and [Rassau](#).

Tip:

To access the retail market in Germany, the Netherlands and Belgium you need ASC or Organic certification. Read the study on [Certified Sustainable Seafood](#) and [Organic Seafood](#) to understand the route to market.

France's large and diverse market

In 2020 France imported an estimated 6,300 tonnes of black tiger shrimp with a value of US\$94 million. France sourced almost 70% of its volume from Madagascar. French importers source other black tiger shrimp products from Bangladesh and Vietnam. Bangladeshi black tiger shrimp is mainly directed to France's ethnic Asian wholesale market, while Vietnamese black tiger shrimp, often ASC certified, will be sold into the high-end wholesale and retail markets.

Madagascar's black tiger shrimp exporters [OSO](#) and [Unima](#) have a long-standing relationship with the French market as well as their own distribution channels — OSO has a joint venture with [R&O Seafood Gastronomy](#) and Unima has its own European distributor, Unima Distribution. Madagascar shrimp is recognised for sustainability, production methods and conservation of mangrove forests. OSO is the biggest supplier of organic certified shrimp in France, and Unima supplies shrimp under the French Label Rouge.

In terms of culinary culture, France is a large, diverse powerhouse of cuisine, with diverse eating habits and various cooking cultures in different parts of the country, in and out of home, mixing in varying degrees the habits of consumers in Southern Europe and those in the rest of Europe. This means that the French shrimp market is quite diverse, both in terms of product types in which shrimp products are offered (a broad mix of cooked and raw, and HOSO and peeled products), as well as in terms of the numbers of species and origins of shrimp on offer.

For organic products, France is the second-biggest market after Germany. Together with Germany, the two countries exceed 53% of market share in the EU. As such, having your black tiger shrimp organically certified could provide a good opportunity, as it gives you access to this market.

Key buyers of black tiger shrimp for the French market include [Argis](#), Escal, [Gelazur](#) and [Crustamar](#). Importers for the ethnic Asian wholesale segment in France include [Paris-store](#), [Wanly](#) and [Gel Peche](#).

Tips:

Read [our study on trends in the European fish and seafood market](#) to learn more about certification in general.

Read our [study about organic certification](#) to find out if this is interesting for you.

United Kingdom: Europe's fifth largest black tiger shrimp importer

Having large communities of West African and South Asian background, the United Kingdom has very strong links to several countries in Asia and West Africa, where black tiger shrimp was historically caught by shrimp trawlers and produced in traditional pond-based trap and hold systems. People in those communities continue to have a strong preference for black tiger shrimp on their menus. As a result in the British ethnic wholesale and retail market, but also in some mainstream retailers, black tiger shrimp is still an important product.

In the United Kingdom's ethnic Asian market, it is common to see black tiger shrimp in various forms from brands owned by exporters from Bangladesh, or in some cases from India. Various British ethnic Asian wholesalers also have their own shrimp processing facilities in Bangladesh. Examples of these companies include [Seamark](#), [Total Foodservice](#) and [Euro Foods](#). Some of these companies import shrimp from Bangladesh as a raw material, process it in the United Kingdom, then sell it as refreshed products. Most other importers import a finished product and sell it as such.

Both in broadline food service and in retail, black tiger shrimp has a relatively strong position in the United Kingdom. However, much like in continental North Western Europe, certification is a must, particularly in retail. As a result, if present in retail black tiger shrimp distributed in the United Kingdom will be sourced from Vietnam. Just like in France, several importers have expressed the desire to source from other countries, especially from Bangladesh, as soon as their ASC-certified shrimp is available.

Some importers of black tiger shrimp into the United Kingdom, in addition to those that own their own plants in Bangladesh, include [Lyons Seafoods](#) and the [The Big Prawn Company](#).

The United Kingdom (UK) left the European Union (EU) on 31 January 2020. As of 31 December 2020, a new trade deal applies. The deal outlines the changes to seafood product trade between the EU and UK, and imports from non-EU countries. If you are exporting to the UK, you may have to adapt your business to the new rules. Brexit and the new trade deal affect customs, tariffs, food safety checks and labelling. For exporters, it is important to know that the EU and UK will regulate their own food safety standards. You can check the changes via the [UK government website](#).

Tips:

Read [this news item to understand the effects of Brexit](#) and keep yourself updated through the [UK government website](#).

Take a look at [our detailed study of the ethnic fish and seafood market in Europe](#), so you can learn more about a potential market for your products.

4. Which trends offer opportunities in the European black tiger shrimp market?

European end users, and your clients by consequence, are changing what they demand from their suppliers in terms of sustainability, certifications, in addition to placing increasing importance on storytelling. At the same time, increasing global production of Pacific white shrimp and negative trends, like mislabelling, put pressure on the bottom line of producers. Being aware of how these trends affect your business is an important ingredient to success in Europe.

Pacific white shrimp remains a competitor for black tiger shrimp

Pacific white shrimp prices are going down and expected to stay low, so the market for black tiger shrimp is confronted with downward price pressure as well. Certain market segments have a true preference for black tiger shrimp over Pacific white shrimp, but there is a tipping point where the price gap is big enough that clients switch in favour of Pacific white shrimp. This is especially the case for those sizes in which black tiger shrimp and Pacific white shrimp overlap (from 26–31 HOSO pc/kg up to 41–50 HOSO pc/kg).

For the bigger sizes, meaning larger than 26–31 HOSO pc/kg, black tiger shrimp has a stronger position as there is no competition from Pacific white shrimp, and other alternatives are often more expensive. This size range, where Pacific white shrimp does not compete, may grow. Most Pacific white shrimp producers around the world tend to focus on slightly smaller sizes because of the additional environmental and disease related risks they are confronted with when growing shrimp for long enough to reach larger sizes.

If you want your black tiger shrimp to compete with Pacific white shrimp where sizes overlap, it is increasingly important to support your clients in promoting your product as a premium item. This can be achieved by highlighting the darker colour, stronger flavour and better texture of black tiger shrimp compared to Pacific white shrimp, but also the sustainability of your production methods.

The positive side for black shrimp producers is that the global supply volume has come down along with the decline of its market position. Farmers who previously produced black tiger shrimp in semi-intensive production systems have now almost all switched to producing Pacific white shrimp, which provides farmers with semi-intensive production systems under better production economics. The fact that almost all black tiger shrimp is now produced by extensive producers alone is an opportunity for you. More on this below.

Tip:

To understand the positioning of black tiger shrimp versus Pacific white shrimp in Europe a bit better, compare the pricing and marketing of the two species on [the online shop of Belgium retailer Colruyt](#). Look for the products referred to as [black tiger gamba](#) or [tiger scampi](#).

Branding and storytelling growing importance

European consumers want to know more about the products they consume. They take interest in the background of sustainability and origin of the products they buy. Since black tiger shrimp has become a niche product in the European market, storytelling is an important factor to access a premium market.

Black tiger shrimp has at least three unique selling points that help to build a story: 1) it is almost entirely produced in extensive production systems, including the potential of mangrove integrated shrimp farming in contrast with the more intensive production of Pacific white shrimp; 2) it is almost entirely produced by small-scale farmers in contrast with the bigger Pacific white shrimp farmers, and 3) it is widely known for its premium taste, colour and texture as opposed to the often described as paler and less tasty Pacific white shrimp.

To set your product apart, you need to show your customers and the consumers in the market that it is worth paying a higher price for a comparable product. Malagasy shrimp exporters OSO and Unima have succeeded in this by telling the story of the extensive shrimp farming sector in Madagascar and by achieving, respectively, organic and Label Rouge certification. Combining a strong verifiable story with a recognised certification is a strong competitive advantage in the European market.

Another example is the [Luna brand](#) under [Lenk](#), extensively sourcing black tiger shrimp exclusively from Bangladesh. By working with local farmer groups and being directly involved in the supply chain they are able to build a high-quality product for the European market. They use both their [website and packaging](#) to tell this unique story, accessing a premium market for these products.

What is important is that by investing in marketing your shrimp as more sustainable or of higher quality than the shrimp of your competitor you can realise better margins in the market. Think about the unique selling point of your product and your production and how you promote this in the market.

Tips:

Take a look at the websites of [R&O Gastronomy](#) and [Unima](#), which both attempt to present their products as the most sustainable shrimp available in the market.

Read [our study on trends in the European fish and seafood market](#) to better understand the effects of branding and storytelling on consumer choices.

Actively try to engage your current, or potential buyer, in the storytelling as they are well aware of both market and consumer trends.

GSSI recognised certification required in most retail markets

Ecolabels like the Marine Stewardship Council (MSC) for wild caught seafood and the Aquaculture Stewardship Council (ASC) for aquaculture seafood are dominant in Northwestern Europe and are growing elsewhere. The number of available ASC black tiger products on the European market has grown from 44 products in 2015, to almost 800 products in 2020. Over the last years the [Global Sustainable Seafood Initiative](#) (GSSI) worked on a benchmark system for sustainability certification. With their benchmarking tool, the GSSI assures that approved certifications, like MSC and ASC, are aligned with the FAO Code of Conduct for Responsible Fisheries, and are therefore the best to use. As a result, more and more certification standards, such as [Best Aquaculture Practices](#) (BAP) and [Global GAP](#), are also recognised by the GSSI. This provides an opportunity for you as an exporter, as more seafood certifications schemes enter the market.

Once international retail groups introduce certifications to a new market, other food service and retail companies must offer certified products to remain competitive. A Belgian importer says: “Sustainably certified products are mostly demanded by retailers, the big supermarket chains. It starts from there, and then you see that also the industries that prepare dishes or portions for supermarkets are forced to have MSC or ASC certification”. Within a couple of years, we expect that the majority of fish and seafood sold in European retail and institutional food service will be sustainably certified.

At this moment, ASC-certified black tiger shrimp is almost only available from Vietnam. There are some other farms in Nigeria, Tanzania, Australia and India that have been accredited as well, but these only represent a minor volume. If you are a black tiger producer from another origin than Vietnam, getting ASC certification is a big opportunity for you to enter the European retail and high-end wholesale markets. European importers eagerly await the opportunity to source from other origins, so they become less dependent on Vietnam.

Tips:

See [our study on trends in the European fish and seafood market](#) to learn more about the growth of certified seafood in Europe.

Check [the ASC's database](#) to see which black tiger shrimp farms have already been ASC certified.

Learn more about the [GSSI benchmark system and approved certifications](#) by visiting their website.

Brine freezing

Brine freezing is rapidly becoming the preferred freezing method for HOSO shrimp destined for the high-end processing market in Southern Europe. Brine freezing uses a sugar and salt mixture, and it is a very quick method to freeze your product. The sugar and salt mixture ensures that the crystals formed inside the shrimp tissues are very small and only cause very small ruptures of cell membranes. Consequently, there is no leakage of liquid left after defrosting, and therefore significantly less weight is lost than with traditional freezing techniques like air blast tunnels or contact plate freezers. While brine freezing is gaining market share, the resulting shelf life is shorter than that of conventional frozen products: around 18 months. Some processors in Europe demand a certain shelf life after receiving the products, so this is something you need to be aware of.

[Atlantic Shrimpers](#) based in Nigeria, uses brine freezing to preserve their farmed black tiger shrimp. According to their technical manager, brine freezing is the best way to preserve the high quality of black tiger shrimp. While the shelf life is shorter compared to normally frozen shrimp, the higher quality provides access to a premium market.

Tips:

Learn more about [the process and the advantages and disadvantages of brine freezing](#) in this detailed article by the Global Aquaculture Advocate.

Check this factsheet about a brine freezer to [learn the specifics of an actual brine freezing line](#).

Be aware that some buyers have specific demands on shelf life. Shelf life is shorter when using brine freezing, so be aware of this when discussing requirements.

Increased attention to labelling of glazing and soaking

[Our trends study](#) warns that problems with glazing and treatment of fish and seafood products are moving up the agenda of authorities and sector associations in Northwestern Europe. Although glazing and soaking both have their roles in moisture retention during processing and storage, both practices are also used to manipulate the price of the product. It is important to be transparent about the water used in or around the product to prevent misleading the end consumer. Adding water is legal, mislabelling is fraud.

European authorities have been slow to address these issues, aware of the economic and health risks involved, but they are not expected to sit idle much longer. Enforcing regulations is one thing, but whether or not the market starts correcting itself is another. Within the European shrimp market, tackling the mislabelling of shrimp products, especially peeled shrimp, has been increasingly debated as importers that claim to be 'clean' complain that they are outcompeted by competitors that break the rules.

It is important to emphasise, once more, that although it may have benefits in terms of market share and margins in the short term, if you apply malpractices yourself, this will have a negative impact on your reputation in the long term. It may even have economic consequences, such as fines imposed on you or your country of origin.

Tips:

Read [our study on trends in the European fish and seafood market](#) to better understand the risks that mislabelling creates.

Read [our news item about the European Union's position on the issue of glazing and soaking](#).

If water accounts for less than five percent of the product's weight, you only need to mention water in your ingredient list, without highlighting it in the title of the shrimp product.

If water is more than five percent of the product's weight, you need to include water in the title of the product with a minimal size of 75% of the product name itself. More information about this rule can be found in the EU regulation (EU) 1169/2011.

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

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