

# Entering the European market for crab

As discussed in our analysis of the market developments and trends for crab, this market is dominated by exporters from within Europe. To be competitive and successfully enter the European market for crab, you should play to your strengths. In Europe, importers are looking for certain major aspects in the crab market: quality, sustainability, availability of products and competitive price. This study will make sure you know the requirements you must fulfil, the entry channels and market segments that give you opportunity, your competition and the prices of crab in Europe.

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## 1. What requirements must crab comply with to be allowed on the European market?

In order to enter the European market and compete with European exporters, which supply most of Europe's demand for crab, non-European exporters must strictly comply with all legal requirements and also focus on the sustainability and traceability of their supply chains. This section is divided into three categories: the mandatory requirements, additional requirements and niche market requirements.

The data used in this factsheet is based on the EU28, which refers to 28 member countries in the European Union. The data used was extracted in 2019 when the United Kingdom was still part of Europe.

### What are mandatory requirements?

#### Catch certificates to combat illegal fishing

Like with all other fishery products, European countries are very strict when it comes to the import of crab that is caught through illegal, unreported or unregulated (IUU) fishing. The European Union uses a Catch Certification Scheme, which is a prerequisite for exporting to Europe and allows authorities to combat IUU fishing. The catch certificate contains [all the information specified in the specimen shown in Annex II of the European IUU legislation](#). Ensuring a slave-free socio-economic condition, this certification is a must for all fishing vessels.

IUU fishing, according to the European Union, [is any fishing that done is in forbidden areas, uses illegal methods or goes unreported](#). IUU fishing has a negative effect on the sustainable management of global (and local) fish stocks and creates unfair competition against those that fish legally and responsibly. The European Union requires that you can prove that your crab products do not come from IUU fisheries.

#### Tips:

Check this link to know more about the [European Union's rules to combat illegal fishing](#)

Check this write up about [the European Union CATCH system which will eventually replace the old paper-based catch certificate system](#). Currently, the CATCH system is not a requirement for non-European Union countries, however, we recommend you learn and comply with the digital system in order to ensure a smooth-flowing transaction with European buyers.

## Management of crab stock

A large part of ensuring that there is no IUU fishing involved in your crab product is the management of crab fishing efforts. Crab stocks are managed primarily through fishing effort limitation and technical conservation measures. For example, brown crabs are managed through the mandatory authorisation of vessels to fish shellfish that only allows them to land a limited amount (25 crabs per day). The key technical measure is the minimum landing size (MLS), designed to ensure animals are allowed to grow to maturity to sustain breeding stocks.

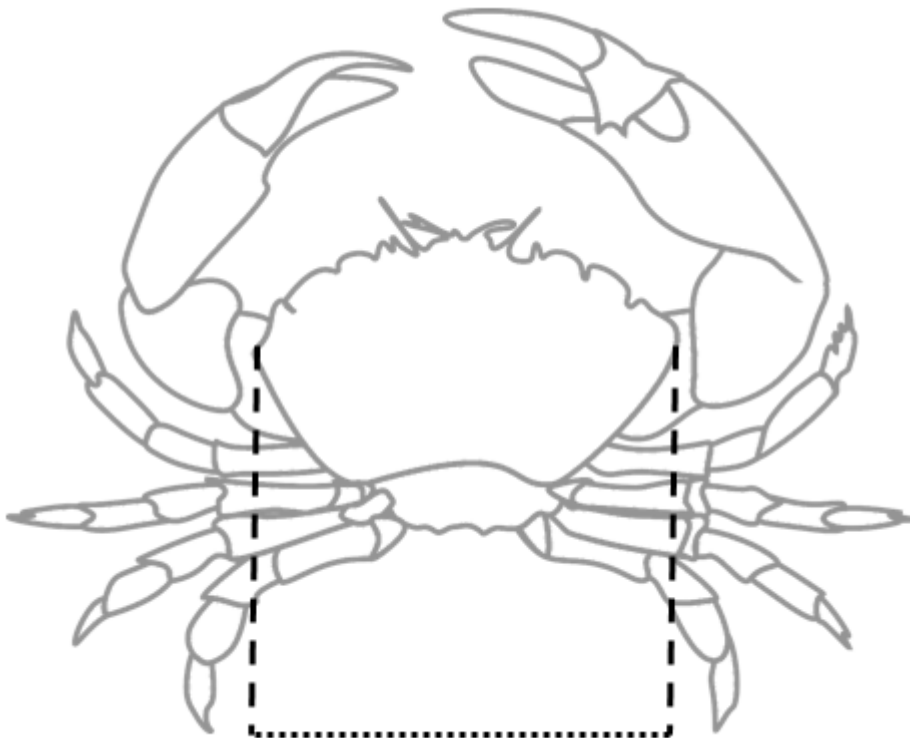
This is a particularly effective way of managing crab fisheries, as [undersized animals that are returned to sea from pots suffer very low mortality rates \(mortality rates are probably higher in trawl and net fisheries\)](#), according to a Responsible Sourcing Guide by Seafish. This is important to know as an exporter because you do not want suppliers to think that you are unsustainably harvesting premature crab.

Let us take a look at how the United Kingdom, a major supplier of crab in Europe, manages its brown crab fisheries.

The MLS for crabs varies around the British coast because of regional variations in growth rate, size at first maturity and marketing practices. Generally, the MLS of edible crab (*Cancer pagurus* L.) was increased on the south coast of England and Wales from 115 mm carapace width (CW) to varying sizes of up to 160 mm CW, depending on the district. The MLS remained at 115 mm on the east coast of England. For velvet crab (*Necora puber*), the MLS is 65mm.

As shown on figure 1, the carapace is the shell on the back of the crab.

Figure 1: Crabs measured across the widest part of the carapace or shell



Source: Seafood Trade Intelligence Portal 2020

### Tip:

To know [more about the minimum sizes for crabs in the United Kingdom](#), check out this list made by

## Labels and packaging

When importing crabs into Europe, [all of the standard labelling requirements for Fish and Seafood apply](#). You can find these requirements in the CBI Buyer Requirements study. Make sure that you understand and follow them. There are no crab-specific labelling requirements but, as with all Fish and Seafood entering Europe, you are required to pack your crab in safe materials and include on the packaging all ingredients that have gone into the product.

## Food safety standards must be followed

Europe has one of the highest food safety standards in the world. Products that are found to be non-compliant will be registered and reported in [the Rapid Alert System for Food and Feed \(RASFF\)](#).

Crab being exported to Europe must also have a health certificate accompanying the product. Hygiene and health are important to buyers, particularly for the shellfish products that are imported into Europe live, such as crab. But for processed crab, it is important to make sure that no contaminants end up in the final product. Seafood destined for the European market is generally tested before it is shipped, sometimes in the buyer's own lab, sometimes in recognised (independent) labs, in order to prevent costly border rejections.

European Union Rules regarding Food Hygiene cover all stages of production, processing, distribution and placing on the market for all food intended for human consumption. The [standard European hygiene rules](#) can be found in the CBI buyer requirement study.

Some of the alerts that have appeared on the RASFF portal pertaining to crabs include hazardous substances such as sulphite or cadmium. Poor temperature control in frozen and live crab products and also improper health certificates are also usually flagged by authorities. As an exporter, make sure that your crab does not contain hazardous substances and make sure to monitor temperature control for crab exports.

The maximum residue level (MRL) is also a detail that exporters should pay attention to. All traces of substances must be declared since they may be harmful to people with sensitivities to these substances.

The MRL indicates the maximum amount that is allowed in the product as established by [Commission Regulation \(EC\) No 1881/2006 \(see Section 3.3 of the Annex\)](#). Sulphite, which is an allergen, is not included in this regulation, but must be declared on the labelling when levels are higher than 10mg/kg or 10mg/l in the final product. For crab, the following are MRLs for various substances that exporters should watch out for:

Table 1: Maximum residue level allowed of substances that are found in crab

Substances Crustaceans	mg/kg wet weight
Lead	0.50
Cadmium	0.50
Mercury	0.50

**Tip:**

Check the [RASFF portal](#) to know what kinds of products are recalled and the reasons for border rejection

**What additional requirements do buyers often have?**

**Buyers want safety seals**

As a standard procedure, exporters must be accredited for food safety, depending on the specific requirement of the buyer. 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:**

Visit the [GLOBALG.A.P.](#) website [to learn more about the important rules for sustainable farming](#).

Make sure that you can provide high quality documents (IFS and/or BRC) and a stable supply if you want to sell your products to retail and food service companies.

**Grading, packaging and labelling**

In table 2, you will find some of the crab species imported into Europe and how they are graded and packaged. Depending on your buyer’s requirements, packaging may vary. It is best to ask your buyer ahead of time what kind of sizes or packaging they are looking for.

Table 2: Grading information of crab products exported to Europe

Country of origin	Species	Grading information
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Norway	King crab ( <i>Paralithodes camtschaticus</i> )	<p>Grading/Sizes:</p> <ul style="list-style-type: none"> <li>• 1.6-2.2 kg</li> <li>• 2.2-3.2 kg</li> <li>• 3.2 kg+</li> <li>• Hurt Mix Sizes – one leg missing/irregular size of legs</li> <li>• A-Grade: Vital live crabs with meat content in legs above 80%.</li> </ul> <p>Packing: Approx. 10-11 kg net weight in thermo box.</p> <ul style="list-style-type: none"> <li>• Duration of freight by air within 30 hours from packing.</li> </ul>
Norway	Snow crab ( <i>Chionoecetes opilio</i> )	<ul style="list-style-type: none"> <li>• All sizes with 1 or more missing legs gram “H = MIX”</li> <li>• 0- 150 gram “M”</li> <li>• 150 – 200 gram “L1”</li> <li>• 200 – 250 gram “L2”</li> <li>• 250 – 300 gram “L3”</li> <li>• 300 – 350 gram “L4”</li> <li>• 350 – 400 gram “L5”</li> <li>• 400 + gram “L6”</li> </ul>
United Kingdom	Brown crab ( <i>Cancer pagurus</i> )	<ul style="list-style-type: none"> <li>• 400g - 600g</li> <li>• 600g - 800g</li> <li>• 800g +</li> </ul>
Ireland	Velvet crab ( <i>Necora Puber</i> )	<ul style="list-style-type: none"> <li>• 8-12 pieces</li> <li>• 13-16 pieces</li> <li>• Pack Size : 1kg Net</li> <li>• Master Carton : 12 x 1kg / 6 x 1kg</li> </ul>
Vietnam	Blue swimming crab meat ( <i>Portunus Pelagicus</i> and <i>Portunus Haanii</i> )	<p>There are four basic categories of crab meat grades:</p> <ul style="list-style-type: none"> <li>• Lump (colossal, jumbo, super lump)</li> <li>• Body Meat</li> <li>• Claw</li> <li>• Finger</li> </ul> <p>Packed in 1lb or 4lbs Plastic Pouch Bag</p>

Crabs are usually packaged in trays and cartons of various sizes depending on the product and requirements of the buyer. A common type of packaging is a ten-kilogram master carton (e.g. 45x27.5x47.5 cm, in which case one Euro-pallet (wooden pallet) can store 24 master cartons) with 10 x 1 kg with a number of crabs depending on the size class.

## What are the requirements for niche markets?

### Buyers want sustainability seals

Around the world, just seven crab fisheries are certified by the Marine Stewardship Council (MSC). These include the [red king crab from Russia's Barents Sea](#), the [Louisiana blue crab](#), [Australian West Coast Deep Sea Crab](#), [Scotian Shelf snow crab](#), [Newfoundland & Labrador snow crab](#), [SSMO Shetland inshore brown crab](#), and the [Peel Harvey Estuary's blue swimmer crab](#). While MSC-certified crab is limited, it is an advantage to have it, especially if you are selling to importers, in particular those from Northern and Western Europe.

Fisheries Improvement Projects (FIP) work with the seafood industry to promote sustainability in the sourcing of wild caught seafood. They help fisheries achieving (MSC) certification. There are a few FIPs that are active with crab, and a list can be found through [FisheryProgress.org](#). In the end, if there is the possibility to obtain a sustainability certification for your products, it will be easier to enter this market. Through [FisheryProgress.org](#), you can [learn about active crab FIPs, and receive support for starting one](#).

Most of the crab entering Europe is wild caught. For developing countries who want to sell farmed crabs, it will be a challenge to get a certification, as crabs is not currently covered by the Aquaculture Stewardship Council (ASC). An aquaculture improvement project (AIP) could assist you towards certification, and engagement with one goes towards proving that you have the desire and potential to achieve certification. While there are no AIPs for crab, the Sustainable Fisheries Partnership [recently launched a directory that can assist you in starting one](#).

Getting an MSC seal helps secure your reputation as a reliable and trustworthy exporter among European importers. It is a worthwhile investment at this stage when sustainability plays a huge role in trade.

#### Tips:

Read our Trends Study for [a better understanding of the importance of sustainability and the growth of the MSC in Europe](#).

An audit by an accredited certification body can be an advantage in the business. Check [the list](#) of accredited certification bodies to see which one could assist you.

Check out the Sustainability Standards Map, which [helps small and medium-sized enterprises in developing countries develop their value chain with a focus on sustainability](#).

## 2. Through what channels can you get crab on the European market?

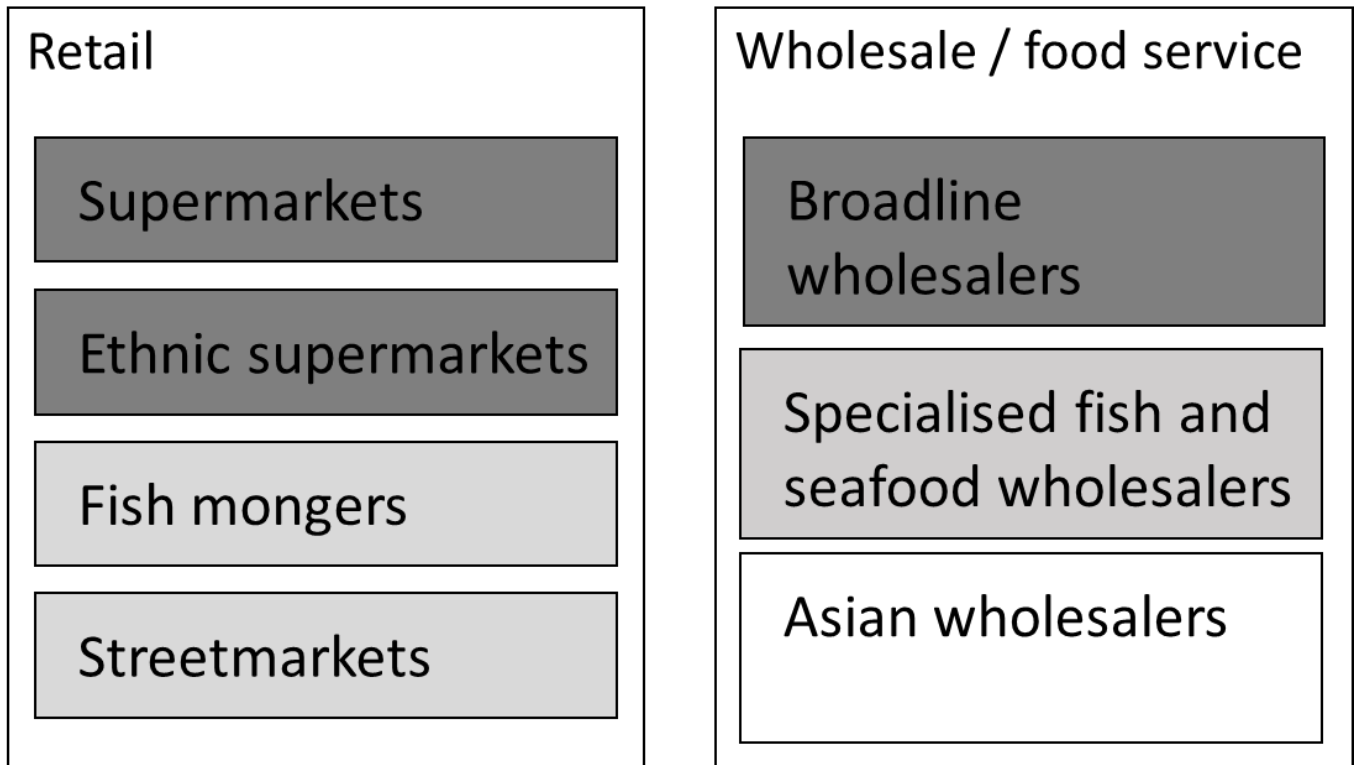
Live crab and frozen or processed crab undergo different processes in the supply chain. However, their end market is the same. The main channels through which exporters can gain access for their crab products are the retail and food service sectors. There is also an opportunity to enter niche markets for crab, since European consumers are looking for variety and diversity in product range.

## How is the end market segmented?

Imports of crab primarily cater to the retail and food service sectors. The business of crab is all about targeting the end consumers. If consumers love your crab, then it is more likely that European importers will buy your product. As mentioned in the crab market analysis, the European markets, especially for frozen and fresh/live crab, are already saturated with crab supplies from the United Kingdom, Ireland and other European countries.

The best way for developing countries to enter the crab market is through dried or smoked crab, crab in brine and the prepared and preserved category as these present more opportunities.

Figure 2: End-market segmentation for crab



Source: Seafood Trade Intelligence Portal, 2020

Figure 2 shows the main retail and wholesale/food service end-market segments in Europe. The segments that are darker are those that are most interesting for you, as a producer of crab, as they are the segments in which your products have the highest demand. Depending on the seasonality and availability, crab may also be sold by fish mongers and street markets, as well as specialised fish and seafood wholesalers.

It is important to remember that every type of crab product has its own developed market. Live crabs are usually sold to wholesalers, retail and food service customers, largely from France, Spain, Portugal. These nations have a developed affinity for seafood, and the market is particularly busy during the second half of the year with a peak in December. Live crab is regularly available in hypermarkets and sometimes at fishmongers. These countries are also where most seafood processors are found.

Fresh crab is considered attractive for its freshness and quality, especially when it is stored in viviers, which are storage tanks with clean and chilled water. According to a study by SeaFish, live crab is more popular amongst heavy consumers of brown crab, who tend to be over 50 years of age and consuming crab at least three times per year, purchasing for in-home consumption. Live crab is less appealing to light consumers who consume crab less than twice a year, who usually purchase out of home and avoid the difficulty of preparation.

Because of the seasonality and the risks of mortality, frozen and processed crab are good alternatives to live crab. They are found in the frozen section of major retailers and ethnic supermarkets. The United Kingdom and

Ireland are the biggest markets for these products and you can find frozen crab and crab claws in major retailers across these countries. For other European countries, however, the best chance to find frozen crab is in ethnic supermarkets.

### Tips:

Consider trading with the Netherlands and Germany. Dutch and German traders often also supply Eastern European markets. Discuss what products may be of interest to markets in Eastern Europe and what can be supplied through these channels. Lithuania, Bulgaria and Hungary were the three biggest importers of frozen, prepared and processed crab in Europe in 2018.

Be strategic in tapping into the European market. Since crab is not considered an everyday purchase, consider offering discounts, especially during the holiday season, when consumers usually buy crab. Be imaginative in presenting your product to the food service sector. Think in terms of how the sector can use canned fish on their menus or their range of dishes.

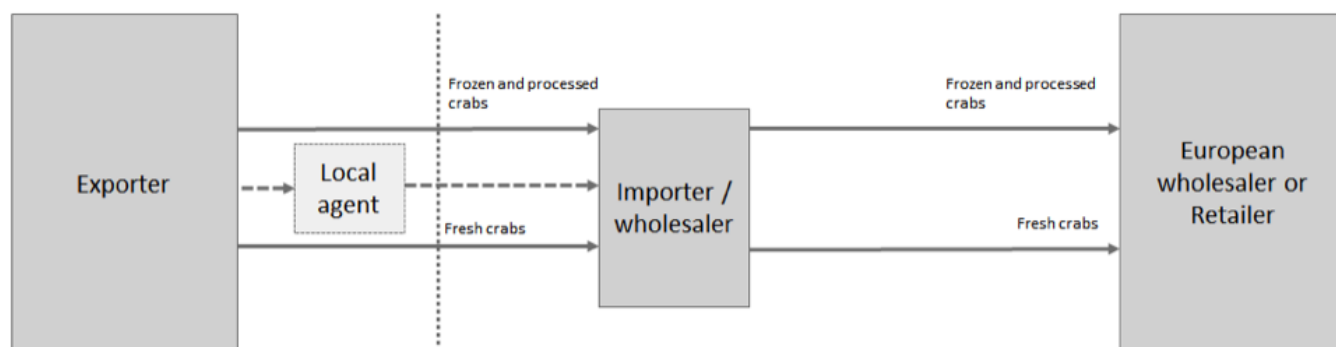
Check out European associations such as the [EU Fish Processors and Traders Association \(AIPCE-CEP\)](#) or the [Seafood Importers & Processors Alliance \(SIPA\)](#). If you are selling raw materials of crab meat that would further be processed, contact Spanish processors through groups like [Asociación Nacional de Fabricantes de Conservas de Pescados y Mariscos \(ANFACO\)](#) (National Association of Canned Fish and Seafood Manufacturers) or the [Asociación Española de Importadores Mayoristas de Alimentos del Mar \(ALIMAR\)](#) (Spanish Association of Seafood Wholesale Importers).

## Through what channels does crab end up in the end market?

The retail and food service sectors are the end market for your crab products. As said in the previous section, it is important to know your target market for your product. There is a stark contrast in the markets for fresh, frozen or processed products. Most supplies also originate from within Europe. Therefore, the best chance to enter the European market is through traders and agents, particularly those based in the major importing nations in Europe (Spain, Italy, France, United Kingdom and Portugal) or trading nations (Germany and the Netherlands).

In both markets, it is best to deal with importers and wholesalers who can give you access to the retail and food service sectors. This section is divided into two parts: the retail sector and the food service sector. We will also discuss the pros and cons for each crab product in each market.

Figure 3: European market channels for fresh, frozen and processed crabs





## Retail

The markets for retail are usually supplied by dedicated suppliers. Thus, in order to get into the retail market, it is best to contract a middleman or a trader that can help introduce you to huge retailers. Quality is very important, so if you are new in the business, make sure you comply with all the mandatory and additional requirements (refer to section above).

As an exporter, you can also deal directly with the retailer. There are risks that go along with a shorter supply chain as you will have to be responsible and accountable for a steady supply of crab that matches the agreed upon quality and specifications. On the other hand, it allows you to increase the margins that you gain from the sales.

Crab quality and shelf life are strongly affected by duration of captivity, transport, handling and storage conditions along the supply chain. Usually, in the trade of crab, the exporter is responsible for the processing, packaging and transport of the crab, as they are the most knowledgeable in handling and maintaining the quality. However, as an exporter, you should always check with the importer or retailer how they want the product to be delivered and handled.

On its product website, Trinity Vietnam, for example, has already provided details on how its products are packaged and stored for importers to choose from. However, it is always good to ask if a buyer has a specific request in packaging or delivery.

### Tips:

Give tips to the consumer on how to best cook the crab; they often lack knowledge on how to cook and prepare live crabs. This is considered a barrier in retail. For frozen and processed crab, instructions on storage and preparation are equally important.

Check out large retailers in your target country, for example, Carrefour in France, Mercadona in Spain, Aldi, Edeka, and Lidl in Germany, Sainsbury and Tesco in the United Kingdom and Albert Heijn in the Netherlands.

Make use of the available logistic facilities of the European ports, from where products are further distributed, if you want to distribute your products further into Europe. In Europe, the ports of Rotterdam (the Netherlands), Antwerp (Belgium) and Hamburg (Germany) are crucial distribution hubs.

Go to events and exhibits such as the [Seafood Expo Global](#), which is usually held in Brussels, Belgium. However, starting 2021, the trade event will be held in Barcelona, Spain. You can meet a lot of potential importers there. A tip for spotting crab buyers: they usually also deal with other related crustaceans such as lobster or shrimp.

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.

## Food Service

The food service market for live crab is limited in Europe and particularly focused in France, Spain and Portugal. Markets are usually found in specialised fish restaurants, particularly high-end restaurants that do not use ready-to-eat products. It is considered a niche feature in the food service.

The food service sector for live crab is strongly based on appearance and quality because those are the qualities that consumers are looking for and are willing to pay for. Factors include price and quality (intensity, smell, date of capture), origin, assurance of wild product, size (as a guarantee of meat content) and appearance (colour, hardness of carapace, presence of claws).

Meanwhile, there is a huge opportunity for processed and frozen crab products in the United Kingdom. Pre-cooked and ready-to-cook products are also convenient when it comes to restaurants, hotels and catering services. It is important to remember that food service companies usually have their own suppliers or are the owners of the entire supply chain including fishing for crabs. As such, it is best to contact restaurants directly or have traders arrange for an initial meeting. Price, quality and reliability of supply are crucial in the food service sector.

In the United Kingdom, crab in the food service sector is a huge business. In restaurants, they usually serve red king crab, which is exported frozen from the non-European Union countries. Creative menus involving crab are key in the food service sector. As an exporter, you have to check what types of crab are usually prepared in these restaurants.

As you can see from figure 3, to enter the European market, you should go through a local agent or an importer or wholesaler. Local agents can be individual consultants that have further connections with importers or working under an importer. They allow the exporter to gain insight into the European market from someone in the industry. Traders or importers can also provide you with connections into markets like retail or food service that would otherwise be difficult to reach. They can also give you updates on changes in the market and competition.

### Tips:

Check out the species and products offered in the food service sector. For example, some of the restaurants that offer live crab are [Crabe Marteau](#) in France, [D'Berto](#) in Spain or [Marina Terrace](#) and [Sol Dourado](#) in Portugal.

Consider offering holiday discounts and packages particularly for the peak season. [Fancy Crab](#) in the United Kingdom offers menus based on frozen red king crabs imported into the country from Russia. They also offer a Christmas menu based on their crab.

Check out European associations such as the [EU Fish Processors and Traders Association \(AIPCE-CEP\)](#) or the [Seafood Importers & Processors Alliance \(SIPA\)](#). If you are selling raw materials of crab meat that would further be processed, contact Spanish processors through groups like [Asociación Nacional de Fabricantes de Conservas de Pescados y Mariscos \(ANFACO\)](#) (National Association of Canned Fish and Seafood Manufacturers) or the [Asociación Española de Importadores Mayoristas de Alimentos del Mar \(ALIMAR\)](#) (Spanish Association of Seafood Wholesale Importers).

Storage and handling, especially for live crab, are very important to both retailers and the food service sector, so you have to make sure that you will be able to handle these delicate species with care during transportation.

Vivier trucks are also an option, especially for live crabs. In the case of a company in Ireland, [these lorries have aerated tanks and can hold up to 12 tonnes of live crab](#) with average delivery time to mainland Europe of 36 hours. When live crabs are not being held in vivier tanks, they are stored in boxes with regulated temperature and moisture and shipped by airfreight.

### 3. What competition do you face on the European crab market?

Your biggest competition in entering the European market for fresh and frozen crab are European countries themselves. Outside Europe, your main competition will be Russia and China. For processed crab, Indonesia and Vietnam are your strongest competitors. In all of the producing countries, there are companies that are successfully exporting their crab to Europe but remember that you are competing with more than just other crab producers; there are also other products that your crab will have to compete with.

#### Which countries are you competing with?

In this section, we will highlight some of the main non-European countries that export crab to countries in Europe. But before that, as exporters you must realise that your biggest competition comes from within the European Union.

#### The European Union

In the study on the market potential for crab in Europe we discussed that imports from within the European Union compose 71% of Europe's total imports. The remaining 29% exported by non-European Union countries are divided among several countries.

For frozen crab, the United Kingdom and Ireland are the major competition with 3,728 tonnes and 1,912 tonnes, respectively, exported to Europe in 2018. However, these volumes have dropped from 2017, with British suppliers suffering from an 18% decline in exports. Some of these volumes went to China, which increased its imports by 47% in the same year.

The United Kingdom and Ireland dominate the exports of live crab within Europe, with an uptick of 3% from 2017 to 2018 for British exporters. Both these countries also lead in the production and export of dried, salted and smoked crab to Europe. For prepared and processed crab products, trading nations like Belgium and the Netherlands are the ones to watch for, with 1,344 tonnes and 1,047 tonnes exported into Europe in 2018 respectively.

In the event that no free trade agreement is made post-Brexit and tariffs are applied between Europe and the United Kingdom, British crab exporters will likely turn to China to sell their products. The volume of frozen brown crab sold to China has increased consistently with sales shooting from 1.8 million euros in 2015 to 7.8 million euros in 2017.

For developing countries, this could be an opportunity to enter the market. As the United Kingdom mostly provides brown crab to European countries such as France and Spain, investing in the brown crab business is a good option. While there is still so much to be determined with Brexit, it is worthwhile to stay up-to-date on the political proceedings. Check the government of United Kingdom's website for [news regarding Brexit](#).

#### Norway

Norway is a huge competitor among non-European Union suppliers as its exports have been growing steadily in the past five years and seeing an 18% jump from 2015 to 2018. With 1,388 tonnes of frozen crab and 144 tonnes of fresh crab delivered to Europe in 2018, Norwegian producers lead the exports among non-European Union countries. They mainly supply edible crab, king crab, snow crab and brown crab to Europe.

Norwegian crab is known to be of high quality coming from clean and cold waters. Companies usually also have a unique tracking system for the crab they export, adding to their reputation of reliability as a supplier.

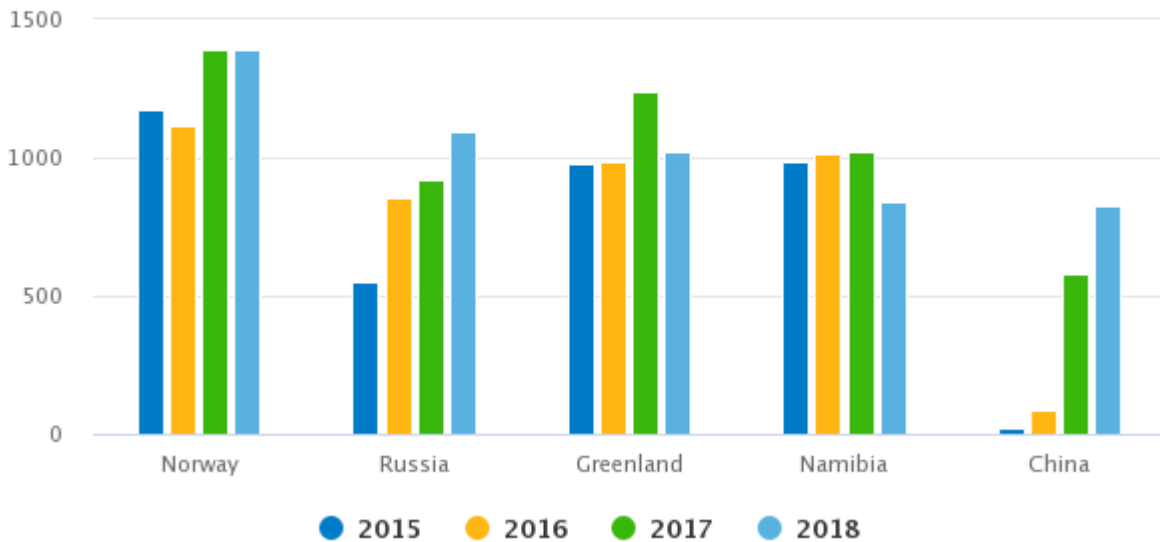
Norway has also strengthened its prepared and processed crab products. In fact, their exports to Europe have more than tripled (364%) from 2015 to 2018, reaching 528 tonnes in 2018.

Norwegian frozen and fresh crab exports are expected to increase in the long term as companies invest more in

sustainability and traceability, particularly for live crabs. Examples of this include Marine Stewardship Council (MSC) certifications as well as tracking methods and logistical improvements in shipping and delivery.

**Figure 4. Top 5 exporters outside European Union of frozen crab to the European Union**

in tonnes



Source: Eurostat, 2019

## Russia

Russia is one to watch in the business of exporting frozen crab to Europe. Its deliveries have been steadily increasing from 2015 to 2018, showing a 97% spike in that period. In 2018, Russia exported 1,091 tonnes.

Supplies are expected to improve in the next years, as the total allowable catch (TAC) has increased by 29.2% in the Kamchatka peninsula. The TAC refers to a catch limit set for a particular fishery, generally for a year or a fishing season. The total TAC for the Russian Federation's Far East crab fisheries went up 7,000 tonnes to 73,500 tonnes.

The Russian authorities have been cracking down on illegal, unreported and unregulated (IUU) crab fishing and illegal poachers. Russian producers specialise in snow crab and king crab.

Russia is also heavily investing in their promotions and marketing of exports to foreign countries, including Europe. [Russian Fish](#), a non-profit organisation composed of major producers and traders within the Russian fishing industry, will help local farmers and traders market their products abroad.

## China

While China has not overtaken the major producers of frozen crab among non-European countries, it is a country that is fast becoming a threat. In 2015, it only exported 22 tonnes of frozen crab to Europe. By 2018, however, exports had skyrocketed to 828 tonnes. This is mostly due to the cheap prices that China offers to European buyers.

Out of all the non-European exporters of frozen crab to Europe, China has the lowest price for its crab, at an average of €4.77/kg in 2018. Compared to the top exporters, this is almost a third of the price of Norway's frozen crab, which is sold at an average of €13.18/kg, and also considerably lower than Namibian crab, which has an average price of €10.05/kg.

However, keep in mind that these species are different from what other major exporters are delivering. China is focused on exporting Chinese mitten crabs and mud crabs.

## Vietnam and Indonesia

Vietnam is the leading exporter among non-European countries of prepared and processed crab to Europe with 1,082 tonnes exported in 2018. While Vietnamese suppliers take the lead, their exports have significantly dropped since 2015 (down by 46%) and have shown a steady decline since then.

The drop was mainly due to a “yellow card” issued by the European Commission because of Vietnam’s failure to address IUU fishing. Crab exports to Europe should continue dropping if this warning has not been removed.

Despite this fallback, Vietnam hopes to have the “yellow card” removed in 2020 by implementing a better tracking and management system in fishing vessels. Additionally, [Vietnam’s blue swimming crab fishery](#) in Kien Giang is also under the Fisheries Improvement Program (FIP), which implements improvements in the management of the fisheries in order to achieve the MSC seal. FIP efforts address governance, fishing practices, and environmental impacts of the fishery so that it can meet the MSC standard.

France, the United Kingdom, the Netherlands and Belgium are the top four biggest crab importing markets from Vietnam in the EU. Vietnamese producers specialise in mud crab and blue swimming crab. The blue swimming crab is the most commercially used species for prepared and processed crab products, such as crab meat.

Primary products include crab meat packed in cans or jars. The colossal lump is the most expensive crab meat product because it has the largest size of crab meat. Meanwhile, claw crab meat is the cheapest meat.

Another Southeast Asian nation that is a competitor in the sales of prepared and processed crab to Europe is Indonesia. Like Vietnam, Indonesia also focuses on the export of crab meat derived from blue swimming crab to Europe.

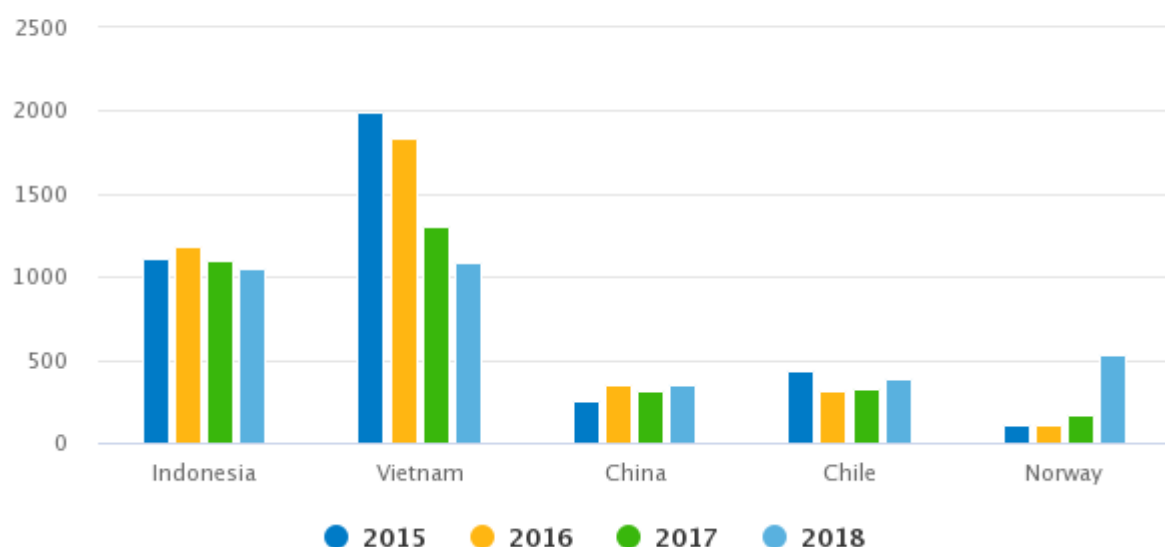
### Tips:

Check out this website to [track Vietnam’s blue swimming crab FIP](#), as well as for tips on how to apply for a FIP.

If you want to know more about Vietnam’s crab meat business, check out this website [for further information on grading](#).

**Figure 5. Top 5 Exporters outside EU of prepared and processed crabs to Europe**

in tonnes



Source: Eurostat, 2019

**Table 3: 2018 Average European Union Import Prices**

€/kg	2015	2016	2017	2018
Norway	9.11	13.81	13.24	13.18
Russia	14.27	12.90	12.69	10.88
Greenland	7.65	7.97	9.23	11.52
Namibia	6.65	6.70	9.33	10.05
China	152.35	46.41	7.24	4.77

Source: Eurostat 2019

## Which companies are you competing with?

The following companies have been successful in exporting their crab to the European market. Use these examples to learn what is successful in Europe.

### HitraMat

[HitraMat](#) is currently Norway's leading producer of edible crab, representing over 50% of the total Norwegian crab catch. The company specialises in producing crab for the retail, hotel and catering sectors. Crab are caught in traditional crab traps by professional fishermen. The local fishing fleet ensures high-quality raw produce, which is then processed. The company's new processing plant ensures efficient production, resulting in top-quality products for the benefit of its customers.

The company produces a wide range of products including fresh, frozen and processed crab, ranging from crab meat and crab claws to dressed crabs. HitraMat also markets its products as gourmet, premium products through the brand Gourmat, which includes crab rolls in different flavours.

## **Trinity Vietnam**

[Trinity Vietnam](#) is focused on producing, processing and canning crab meat. They specialise in the production of pasteurised and sterilised claw, lump and jumbo crab meat from the red swimming crab (*Portunus Haanii*) and blue swimming crab (*Portunus Pelagicus*). They export to France, the United Kingdom, Germany and Italy.

The company also produces sterilised white claw meat in brine. Sterilisation kills all microbial pathogens while pasteurisation is a process that kills the pathogenic bacteria by heating to a certain temperature for a set period of time.

Pasteurised products have a shelf life of 6-18 months while sterilised crabmeat has a shelf life of up to 36 months from production date. Unlike other canned seafood like tuna or mackerel, pasteurised crab meat cannot be stored at room temperature but must be stored at 0-5 degrees Celsius. Sterilised crabmeat, on the other hand, could be stored at room temperature.

Some buyers request pasteurised and sterilised crab meat, especially when they want to have products stored for a longer period. Trinity Vietnam is a good example of how a processor enters the European market through diversification of its products and tailoring it to buyers' needs and requirements.

## **PT Toba Surimi Industries**

[PT Toba Surimi](#) is an Indonesian company that specialises in the production of pasteurised crab meat products such as jumbo lump, super lump, crab claws and other value-added processed crab like whole unbroken meat in lumps. Toba Surimi's markets include Europe, Canada, Japan and Australia, and the company has an annual turnover of \$24 million. Pasteurised crabmeat products can be packaged in cans or plastic tubs depending on the requirement of the buyer.

Like Trinity Vietnam, Toba Surimi invests in the integrity of their crabmeat facilities and products through comprehensive microbiology analysis of sterilised products tailored for the European market's needs.

## **Which products are you competing with?**

### **Fresh and frozen lobster**

Being in the same shellfish and crustacean category, lobster is the primary competition for crab in the European market, specifically in the frozen and fresh categories. In France, for example, chilled cooked lobster is popular and widely used in catering and retail. Lobster is also considered a luxurious seafood, also eaten during the holidays and with peak consumption in December, just like crab.

Live lobster also has its niche market in France, and is usually supplied by Ireland in storage tanks at €25 per kilo. Like crab, lobster production is concentrated in European fisheries, particularly in the United Kingdom and Ireland. Lobster imported to Europe is mostly sourced from Norway. Lobster and other crustaceans compete with crab in the end market (retail or food service sectors).

## **Surimi**

Surimi is direct competition for exporters from developing countries, particularly for those that supply prepared and processed crab to Europe. There are two factors why it is a direct threat to exporters from developing countries. First, surimi is often mistaken as crabmeat, which is why it is often referred to as imitation crab. However, surimi is actually a paste made from white fish such as Alaska Pollock or Pacific hake combined with starch and egg white. This common misconception can be a barrier when consumers decide to buy prepared

and processed products.

Second, it is a product that comes with an attractive price. Compared to crab meat, which is already cheaper than fresh and frozen crab, surimi can be significantly cheaper.

For exporters of prepared and processed crab, it is important to give premium to the fact that crab meat is made from actual crab. Focus on new recipes and improve marketing campaigns in order to entice European consumers to buy this product.

## 4. What are the prices for crab?

It is difficult to get a specific price for crab as there are several considerations to factor in. Prices can vary based on seasonality of crab, type of species, size, shelf life, origin and product type. In general, live crab is more expensive than frozen crab because of the costs of management, storage or transfer. Live crab is also fresh and, in the seafood industry, a product is considered more premium the fresher it is.

Table 4: Average import prices from exporters outside European Union and exporters within European Union in 2018

Product	Import price from outside EU €/kg	Import price from within EU €/kg
Frozen crabs	9.55	8.16
Live, fresh crabs	16.3	5.41
Dried, salted, smoked, brined	18.04	8.95
Prepared and preserved	13.32	11.09

Source: Eurostat, 2019

Looking at table 4, import prices from European countries definitely have the advantage over countries outside the European Union. This is because countries such as the United Kingdom or Ireland, which are both major producers of crab, benefit from the access and proximity to other European countries.

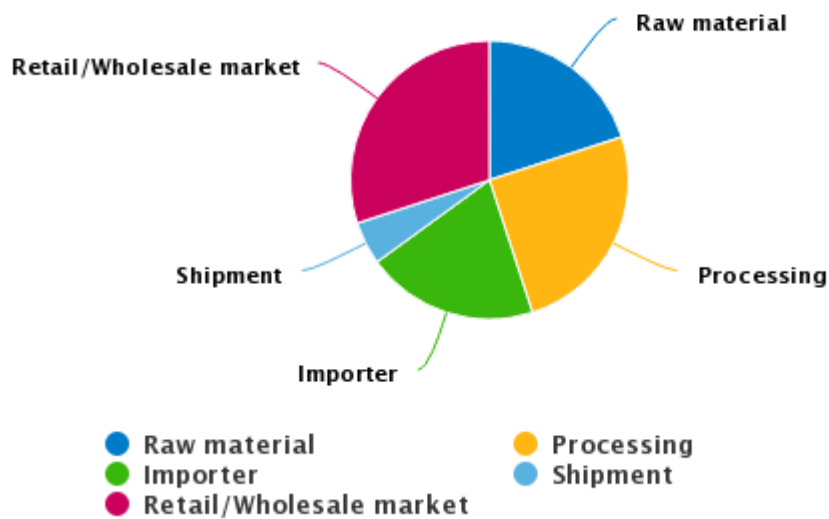
Price is definitely a consideration among European buyers, so if you can offer products at a competitive rate without compromising on quality, your product becomes more attractive.

In the graph below, you will find the average percentage allocated for each part of the supply chain. This is only an estimation and will vary depending on your product type.

As mentioned in our study on the European market potential for crab, [developing countries should focus on the prepared and processed segment as the live and frozen crab segments are already dominated by European suppliers](#). A sizeable chunk of the price is due to processing, like removing shells for processed crabs and handling and storage for live or frozen crabs. Shipment costs also affect the price and these can be even higher for the transportation of live crab exports. As an exporter, carefully plan the best way to transport your crab and maintain quality.



Figure 6. Sample Price breakdown for prepared and preserved of crabs  
in %



Source: Seafood Trade Intelligence Portal, 2020

### Tips:


Discuss with your clients to better understand their specific needs. Shelf life is a very important factor, especially for live products.

Decide what is the smartest way to transport your crab without risking the quality. Transportation, handling and processing are important parts of the supply chain because this will determine the quality of your crab from country of origin to destination.


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

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