CBI
Ministry of Foreign Affairs

Exporting fish and seafood to the European ethnic retail channels

1 . Scope and products

The scope of this survey is the ethnic (food) retail channel. This survey gives insights into the European market for frozen and other types of processed (dried, salted, canned) fish and seafood, with a particular focus on the ethnic retail channel. We will zoom in on a few of European's leading ethnic seafood markets (the United Kingdom, France, Italy, the Netherlands and Germany). Although these countries have a number of different characteristics, ethnic fish and seafood in Europe is a rather coherent market. The definition of "ethnic retail" refers to retail stores that focus on a product range with ethno-cultural characteristics, in particular for Asian, African, or Arab (i.e. including Berber and other Middle Eastern) customers.

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Picture 1 – A typical ethnic retail store in Chinatown/Soho, London, the United Kingdom

In terms of products, a large share of the fish available in ethnic retail outlets is frozen whole fish. Most whole fish (over 400 grams per fish) is sold as Individually Quick Frozen (IQF), often one fish per package. Smaller fishes (between 50–400 grams) can come with more fishes in a package, whether in an Individual Wrap Package (IWP) or not. Small fishes can also come in (“clean”) blocks of 250–500 grams, and sometimes 1 kg.

The range of (frozen) fillets and steaks available in European ethnic supermarkets is rather limited, as there is a preference among the ethnic population for buying whole fish. Yet the younger the generation, the greater the preference for convenience products, such as fillets and steaks. However, such a trend is difficult to quantify, as fillets and steaks are also easily available through other channels, such as mainstream supermarkets and fishmongers.

Other product groups available in ethnic supermarkets are frozen seafood and canned fish products. Both product groups do not differ very much from mainstream retail in terms of species. The main difference for frozen seafood is packaging sizes; shrimp usually comes in larger packages than in mainstream supermarkets.

Dried fish is a product group that is rather unique to ethnic retail stores, as dried fish is not a common product in mainstream retail supermarkets. Although sales of dried fish, including frozen dried fish, might be a bit higher than canned fish in European ethnic retail channels, this is a rather small product group in terms of market size.

Fresh fish and seafood is also sold in ethnic supermarkets, but this mostly entails fish and seafood from nearby catch areas, such as the eastern Atlantic Ocean. As such, it does not differ from the fresh fish supply in other European sales channels.

Below is an overview with examples of product packaging and presentation, per category.

Frozen whole fish, IQF

Frozen whole fish, IQF

Frozen whole fish, blocks

Frozen whole fish, steaks

Dried fish

Canned fish

Fresh fish and seafood

Dried fish, frozen

2 . Which European countries offer opportunities?

To a large extent, the size of ethnic populations in Europe and the demand for ethnic foods are determined by colonial heritage. This relationship basically explains the large markets for ethnic foods in the UK, France, and the Netherlands. Of the total European Union population of 510 million, about 20 million (4%) are members of diasporas of non-European origin. European countries with the highest number of such diasporas are the countries mentioned earlier – France, the United Kingdom and the Netherlands – as well as Germany, Italy and Spain.

Of these countries, Germany, France, the United Kingdom and the Netherlands have been selected as focus countries. Spain has not been selected, as a large share of the non-European citizens in Spain are from Latin America. Spain has a well-developed trade relationship with Latin America, and the fish and seafood from Latin America are sold through regular channels. Still, Spain can be an interesting market for fish and seafood from exotic origin. For example, Spain is home to about 150,000 people of Filipino ancestry, which also includes a considerable number of expatriates from the Philippines living in Spain.

Ethnic populations in France, Germany, Italy, the Netherlands and the United Kingdom

A data comparison for the three ethnic groups (Arab, African and Asian) in the five European focus countries shows that the largest share and absolute number of Asian and of African people are found in the United Kingdom. The Netherlands has the largest Arab (i.e. Northern African and Middle Eastern) population in terms of share, while in absolute numbers the largest Arab population is in Germany. Also see the following table.

Table 1 – Ethnic population structure in France, Germany, Italy, the Netherlands and the United Kingdom in millions, with shares in percentages in brackets.

	France (2013)	Germany (2016)	Italy (2015)	Nether-lands (2016)	United Kingdom (2011)
**Ethnic population* / ** **	**3.4 (5.1%)**	**3.2 (4.0%)**	**2.0 (3.3%)**	**1.8 (10.6%)**	**5.3 (8.4%)**
Of which:					
- Arab (Northern Africa + Middle East)	2.0 (3.0%)	2.4 (3.0%)	0.8 (1.3%)	1.0 (6.1%)	0.2 (0.3%)
- African (Rest of Africa)	0.8 (1.2%)	0.3 (0.3%)	0.4 (0.6%)	0.2 (1.2%)	1.0 (1.5%)
- Asian***	0.6 (0.9%)	0.5 (0.7%)	0.8 (1.4%)	0.6 (3.3%)	4.1 (6.5%)
Total population	**66.0**	**81.4**	**60.7**	**17.1**	**63.5**

* This is the sum of Arab, African and Asian ethnic groups. Therefore, it is not the total ethnic population (European, American and Australian immigrants are not included).

** This is the sum of first, second (and following) generations.

*** This includes South, Central, and East Asia.

Table 1 shows that the Netherlands has the highest ethnic population share (almost 11%), followed at some distance by the United Kingdom (8.4%). This is mainly the result of the relatively high share of citizens of Turkish and Moroccan ancestry in the Netherlands (referred to here as “Arabs”). The UK has by far the largest population of Asians (4.1 million or 6.5%), and also Africans (1.0 million or 1.5% of total population).

The focus countries’ ethnic population structures are as follows:

- The Netherlands has a relatively large number of immigrants from Indonesia (more than 360,000 people). The largest groups of immigrants, however, come from Turkey (almost 400,000) and Morocco (390,000).
- The UK is home to a large group of South Asians: 1.4 million Indians, 1.1 million Pakistani, and 450,000 Bangladeshi. The country is also home to the second largest Filipino diaspora in Europe.
- France has a large immigrant population from countries where French is a common language (also called Francophone countries), such as the Maghreb (Algeria, Tunisia, Morocco), several West African countries, and Cambodia, Laos and Vietnam.
- Italian immigrants mostly come from Morocco (440,000 people), followed by China (270,000), Philippines (170,000; Italy has the largest Filipino diaspora in Europe), India (150,000), Bangladesh (120,000), Egypt (110,000), Sri Lanka (100,000) and Pakistan (100,000).

- Germany is home to the largest population of Turkish-Europeans: 1.5 million people.

In general, immigrants prefer to live in the larger cities and urban areas. This is particularly true for African immigrants, who for example live in relatively high densities in Paris (France) and Amsterdam (Netherlands). However, this is also the case for the Asian and Arab populations in Europe. European cities with the highest concentration of ethnic populations, by country, are:

- France: Paris, Lyon, and Marseille
- Germany: Berlin, Bremen, Hamburg, and Munich
- Italy: Milan and Rome, followed by Bologna, Florence and Turin
- Netherlands: Amsterdam, The Hague, Rotterdam, and Almere
- UK: (in and around) London, Birmingham, Leicester and Manchester.

Ethnic consumer behaviour for seafood

There is a strong relationship between the number of ethnic people in countries, regions and cities, the number of ethnic restaurants, and the number of ethnic retail stores. This is mainly because in such situations there is obviously a demand, while the restaurants and retail stores are usually owned and managed by ethnic inhabitants as well.

Yet there is also quite some difference in fish-buying behaviour between the several ethnic groups. This is basically because ethnic populations retain their traditional fish consumption behaviour and preferences when living abroad. This is particularly true for the first-generation immigrants, but that generation also has a considerable influence on the following generations’ fish consumption behaviour. The ethnic population can be roughly divided into three groups (not including Latinos): Arabs, Africans and Asians. More details follow below.

The Arab population in Europe to a large extent consists of ethnic Moroccans. Moroccan-Europeans prefer to buy fresh fish from the eastern Atlantic region. This is more or less the same fish that is available in common trade channels in the focus countries. As they prefer fresh fish, they mostly buy fish at fishmongers, open-air markets (see Picture 1), at fresh fish counters of large wholesalers (like Metro in Germany or Makro in the Netherlands) or in large food retail stores (which are common in France, Italy, and other southern European countries). For this reason, the availability of frozen fish and seafood in ethnic retail stores that focus on the Arab ethnic population is rather limited. Often it is limited to one or a few stock-keeping units (SKUs) only, and then it generally is a low-cost and well-known whole fish, usually tilapia.

Picture 2 – Open-air market in the Netherlands

The African population in Europe mostly consists of people from West Africa. As with the Arabs, the ethnic African population in Europe is used to eating fish from the eastern Atlantic region too. They have a preference for relatively cheap fish which has been abundantly available in the past, often pelagic species like blue whiting, herring, mackerel, horse mackerel, sardine and sardinella. Either fresh, smoked, canned or dried; Africans like and need these fish species, as these are their main source of high-quality protein. As with the Arab population, the African-Europeans also like fresh fish. For that reason, in the African hubs in the big European cities – like in the Parisian street called Rue Dejean in Chateau Rouge – there are several fishmongers offering a wide range of fresh fish from the Atlantic region, in particular the eastern Atlantic.

Within the Asian population in Europe there is a difference in fish consumption behaviour between East Asians (with origins in e.g. China, Japan, Mongolia, North Korea, South Korea, Taiwan, Hong Kong and Macau), the South Asians (with origins in e.g. Afghanistan, Bangladesh, Bhutan, Maldives, Nepal, India, Pakistan and Sri Lanka) and Southeast Asians (with origins in e.g. Vietnam, Laos, Cambodia, Thailand, Myanmar, Malaysia, Indonesia, Singapore and the Philippines). This is mainly related to the traditional fish consumption behaviour in their home countries.

East Asians in Europe are predominantly of Chinese origin. Traditionally, Chinese prefer freshwater fish (which is mostly aquaculture fish), but they also consume seafood and marine fish, particularly in the coastal regions. The dominant aquaculture species in China is tilapia, which is also the most common fish in Chinese ethnic supermarkets in Europe (sold in frozen form).

South Asians in Europe are predominantly Indians, Pakistani and Bangladeshi, who mainly live in the UK. India and Bangladesh are marked by a large aquaculture production industry, with India's industry even the second largest worldwide, after China. On average, the people in these countries mostly eat freshwater fish from aquaculture production. However, a small share of India's population that lives within 50 kilometres from the coast consume seafood and marine fish, usually low-cost fish such as anchovy, sardines, barracuda and trevally.

In the European countries with large South Asian populations (primarily the UK, but also Italy) there is a good supply of products of South Asian origin destined for the ethnic South Asian population, developed by South Asian entrepreneurs.

Within the group of South Asians, the Bangladeshi population has the highest per capita fish and seafood consumption. Fish and seafood plays an important part in their diet. This is clearly visible in the European cities with a major Bangladeshi population, such as London and Milan. In London, most Bangladeshi live in East London boroughs, such as Tower Hamlets, so there are also several Bangladeshi supermarkets in that area. In Milan, there is a concentration of Bangladeshi food stores close to the central railway station (Via Enrico Petrella). All Bangladeshi food retail stores have a large frozen fish and seafood section, with a wide range of fish species available from Southeast Asia, and in particular from Myanmar, such as rohu, hilsa, mrigal, ayer, boal and karfu.

Picture 3 – Typical chest freezer area in a Bangladeshi-owned ethnic supermarket

Consumer preferences

The average ethnic consumer prefers:

- whole round fish, but also steaks and fillets. The younger the generation, the greater the preference for convenience products, such as steaks;
- large-sized packages (between 500–1000 grams per package) of seafood;
- the same fish and seafood as which are common in the country of origin, both in terms of species and type (whole, fillet, dried, fresh or frozen, etc.).

The poorer the availability of their preferred products in other sales channels, the greater the preference for ethnic supermarkets. It also works the other way around: shop owners offer a range of seafood that fits the needs of their customers, so if customers of a particular shop buy their frozen fish and seafood elsewhere, the shop will not have a large frozen fish and seafood section.

Ethnic food retail store profile

Ethnic food retail stores in the focus countries can be divided into six groups:

- Small to medium-sized shops in large cities with large ethnic populations that are often family owned. The profile of the shop usually matches the ethnic background of the shop owner, meaning that for example a Bangladeshi shop-owner will run a Bangladeshi oriented food market. Stores in this category with an Asian customer orientation usually have a larger frozen fish and seafood section (10–25 SKUs) than African grocery shops (between 3–15 SKUs). Arab shops have the smallest range (between 1–5 SKUs).
- Small to medium-sized shops outside the large cities with large ethnic populations. These shops are also often family owned. While the basic range of products will definitely match the ethnic background of the shop owner, a store in this category will often be the only one in the town or region, and will therefore also offer a more multi-ethnic range of products to meet the wishes of

a range of ethnic consumers. A few examples of such shops are:
  - Angkor-Store in Bonneville, France
  - Thien-Hung in Zwolle, the Netherlands
  - DS Asia Supermarket in Heilbronn, Germany
  - Hello! Food Store in Parma, Modena and Piacenza in Italy, owned and operated by the importer Global Trading from Italy
  - Wai Yee Hong in Bristol, UK.
- Medium-sized multi-ethnic food retail stores, which is a category of shops offering a wider range of ethnic food, from a variety of countries and/or regions. The management of these shops is more professional, the stores are more spacious, displays and presentations are more advanced, and there is better service provided to customers (e.g. there are other payment options than cash only). Examples are:
  - Paris, France: Big Store is an Asian food retail store with a very wide range of fresh exotic fruit, and also a large frozen fish and seafood section.
  - Paris, France: Exo Store offers a wide range of food products from Asia, including Chinese, Japanese, Vietnamese and Thai products.
- Ethnic food retail chains that have numerous medium-sized stores. Theses chains work on a national basis in Europe. In France and the Netherlands there are a few of them:
  - France: Paris Store is an Asian supermarket chain with fifteen stores across France, of which eight are located in or close to Paris.
  - France: Tang Frères (“Tang Brothers”) is an Asian supermarket chain with seven stores in Paris.
  - Netherlands: WNH is an Asian supermarket chain with four stores in the western part of the Netherlands.
  - Netherlands: Amazing Oriental has more than 20 stores plus a web shop. Most locations are in the south-western and south-eastern parts of the Netherlands.
  - Netherlands: Tanger Markt with 13 stores (including a few in Belgium) offering a range of food products for the ethnic population.
  - UK: Wing Yip has four stores across the UK with a focus on Chinese products, although they also stock other Asian food products.
  - Germany: Go Asia has six stores in total, four stores in and around Berlin, and one outlet each in Frankfurt and Dusseldorf.
- Online web shops, such as Asia-Market.It and AsiaMach in Italy, Red Rickshaw and JohnandBiola in the UK, and AsianFoodLovers in the Netherlands.
- Other stores, which do not fit in the previous five profiles:
  - Italy: Kathay is an Asian food retail store in Milan with a focus on food and related products from China, Japan, India, the Middle East and Thailand.

3 . How large is the European ethnic market for fish and seafood?

In terms of market size, it is difficult (but not impossible) to give a rough estimate of market size and leading suppliers for fish and seafood.

The overall ethnic food market size is estimated to represent about 1% of the European food retail market. In the five focus countries, the turnover of food retail is estimated at about €850–900 billion per year. One per cent of that value means between €8.5–9.0 billion per year (by comparison, the organic food market was worth about €30 billion per year in 2016 and 2017). Assuming that the mainstream food retailers account for 20% of ethnic food sales, the balance of about €7 billion is left for the ethnic food stores. The share of fish and seafood products sold in ethnic food stores in total turnover is estimated at about 12%, resulting in a value of about €850 million per year, which is equally divided between fish (€425 million) and seafood (€425 million). Within the fish range, most fish is sold as frozen whole round (WR), and only a small range is fillets and steaks (about 5%).

Frozen fish, whole – United Kingdom, France and Italy are top three markets

The main market for frozen whole fish for ethnic markets in Europe is the United Kingdom, roughly comprising a third of the European market. Note that a few UK importers also re-export fish to other markets; this is for example the case for fish imported from Bangladesh and Myanmar to the UK and re-exported to Italy.

France takes the second position with between 15–20% of European imports. Italy is good for about 10% of imports, closely followed by the Netherlands (close to 10%). German imports are relatively small at between 3–5% of European imports.

Frozen fish, whole – China dominates supply

In terms of supply, European imports for the ethnic retail market are dominated by China, roughly accounting for 30% of supply. China’s main product is tilapia (about 40% of total supply), which is the most typical whole round fish available in ethnic food stores. Other species supplied by China include golden and silver pomfret, yellow croaker, belt fish, yellow tail snapper and eel.

Picture 4 – A look inside a chest freezer in a typical Asian supermarket

Frozen fish, whole – Myanmar and Vietnam in 2nd and 3rd place

“Newcomer” Myanmar takes second place (20–25%), with a leading role in supplying Europe with rohu and hilsa. Far behind Myanmar follows Vietnam (8–12%), with a mixed range of fish probably dominated by tilapia and pangasius. Turkey, India and Indonesia (6–9%) take positions 4–6, followed by Senegal (5–7%) and Bangladesh (4–6%). The balance is left for Thailand, Pakistan and Philippines.

Frozen fish, fillets and steaks – only 5–10% market share

In terms of market size, fillets and steaks take up less then 10% of the European market, quite likely just some 5% of it. In many small stores the only SKU available is 1 kg of pangasius fillet from Vietnam, while in the medium-sized stores there are up to 5 SKU of fillet and steak available, also mainly pangasius, followed at large distance by tilapia fillets, and only in rare cases other species, such as boal (steak) from Myanmar.

Dried fish and canned fish – small market

The availability of canned fish in ethnic supermarkets is not very different from the availability in mainstream retail channels. Often most SKUs are canned tuna, sometimes also canned mackerel and canned anchovies. The main difference, particularly in Asian but also in African shops, is that canned fish products are of an ethnic brand imported from Asia or Africa.

Sales of dried fish are probably even bigger than those of canned fish, but that is including the dried fish that is offered from the freezer (typically frozen dried pomfret and frozen dried pike eel). In Bangladeshi ethnic supermarkets in Italy and the UK there is typically a small range of dried (not frozen) small fish, available in bags ranging from 100–500 grams, such as lotia and anchovy from Myanmar. Dried fish in African stores are mostly pelagic species from the eastern Atlantic region.

Frozen seafood – dominated by shrimp

The market size of frozen seafood in the ethnic food retail channel is, as explained earlier, estimated at €425 million per year. Based on the field research conducted in September 2017, it can be concluded that the segmentation of this market is comparable to other sales channels. Shrimp is the leading product in this category by far, followed by other seafood such as squid, cuttlefish, mussels and crab.

In small stores the frozen seafood range is mostly dominated by shrimp SKUs, often accounting for more than 50% of the total number of SKUs. In practice that means that in a small store with between 6–10 SKUs of seafood, between 3–5 SKUs are shrimp in different varieties, from Asian tiger (*Penaeus monodon*) to whiteleg (*Litopenaeus vannamei*) shrimp, and from IQF to blocks. A typical offer could be for *Penaeus monodon* under one of its other names: Black Tiger 21–25 IQF P&D or HLSO (P&D: peeled and deveined; HLSO: headless shell on).

In medium-sized to larger stores, shrimp represents between 30–50% of the total number of SKUs. In practice this means that with a total range of 15–30 SKUs, between 5–15 SKUs are shrimp products.

The supplying countries for seafood in ethnic supermarkets are roughly the same as the supplying countries of seafood in mainstream channels. In practice this means that whiteleg shrimp frequently comes from Ecuador, followed by Vietnam or India. Asian tiger shrimp often comes from Bangladesh, Vietnam, India or China. Molluscs usually come from China or India.

4 . What trends offer opportunities on the European market?

Trends in the ethnic food retail market

Over the past decade the European ethnic food retail market has shown above-average growth. This growth can be best understood by realising that up to 60% of the customers of ethnic food retail stores are non-ethnic, that is, indigenous consumers. This group of customers visits ethnic food retail stores because they like to eat different products. You could say that this group of customers is continually looking for new and interesting ethnic foods, and the growing availability of products in this channel is also to a large extent in answer to the interest shown by this group.

Several factors have supported that interest, including an increasingly multicultural society in Europe, growth in international travel, visibility of new cuisine types in the foodservice and media, a wider choice in-store (both in ethnic retail stores but also mainstream retail stores), as well as more stores.

The growth in the ethnic food retail market mainly took place in the preserved grocery range (canned, dried, etc.). It gradually resulted in a much wider range of initially ingredients for cooking, and later also drinks and savoury snacks. But the range of fish and seafood products also increased, given that the frozen shelf space has grown over the years as well.

Trends for fish and seafood

The basic unique value proposition of ethnic food retail stores is their offer of a product range that: 1) meets the requirements of the ethnic target group; or 2) meets the expectations of indigenous consumers with a specific interest in exotic products. As the availability and/or supply of ethnic groceries in the European focus countries is relatively good, it is not too difficult for retailers to offer an exotic and “challenging” range of products to their customers.

For this reason, the ethnic food retail channel is relatively conservative and not a “trendy” market in terms of product development. This also goes for the fish and seafood range. The availability of fish and seafood species and products through importers/distributors to ethnic food retailers is huge. At the same time, the ethnic food retail stores are usually small to medium sized and they need to make choices in terms of product range. Therefore, each individual shop only offers the SKUs (stock keeping units) for which there is a fair demand. This range is evaluated frequently, so the range of each store can change from time to time, depending on demand, availability and pricing.

5 . What requirements must fish and seafood comply with to be allowed on the European market?

Before you can sell to European buyers, you need to fully understand the European Union’s legal requirements that apply to fish and seafood products. Understanding comes first, followed by the route towards compliance. See our EU buyer requirements for fish and seafood study to better understand the legal requirements, as well as the additional requirements that European buyers may request.

In general, the requirements for fish and seafood products sold through ethnic food stores are relatively low. Although the minimum legal requirements must be met, generally there are no other additional requirements in this market. In other words, sustainability certification like MSC or ASC, and food safety certification schemes, such as International Food Standard (IFS), British Retail Consortium (BRC), or GLOBALG.A.P., are not demanded in this market. This is not expected to change in the next few years, as the first criterion for buyers is a good price, while certification schemes make the fish more expensive.

Tip:

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

6 . Market channels and segments – which channels can you use to put fish and seafood on the European market?

The ethnic food retail market in Europe is a niche market with completely different trade channels and segments than mainstream food retail. Figure 1 shows that there are several options to access the European ethnic food market. Potential partners can be agents, importers or distributors.

Virtually all linkages between agents, importers and distributors are possible, as there is a lot of trade between the various players in the value chain, with the aim of offering a complete range to customers. The trading companies in the ethnic fish and seafood value chain are relatively small compared to those in the regular channels. Sometimes the trading companies only trade frozen foods (vegetables, snacks and meat can also be part of the range), and larger companies also trade in groceries and fresh foods.

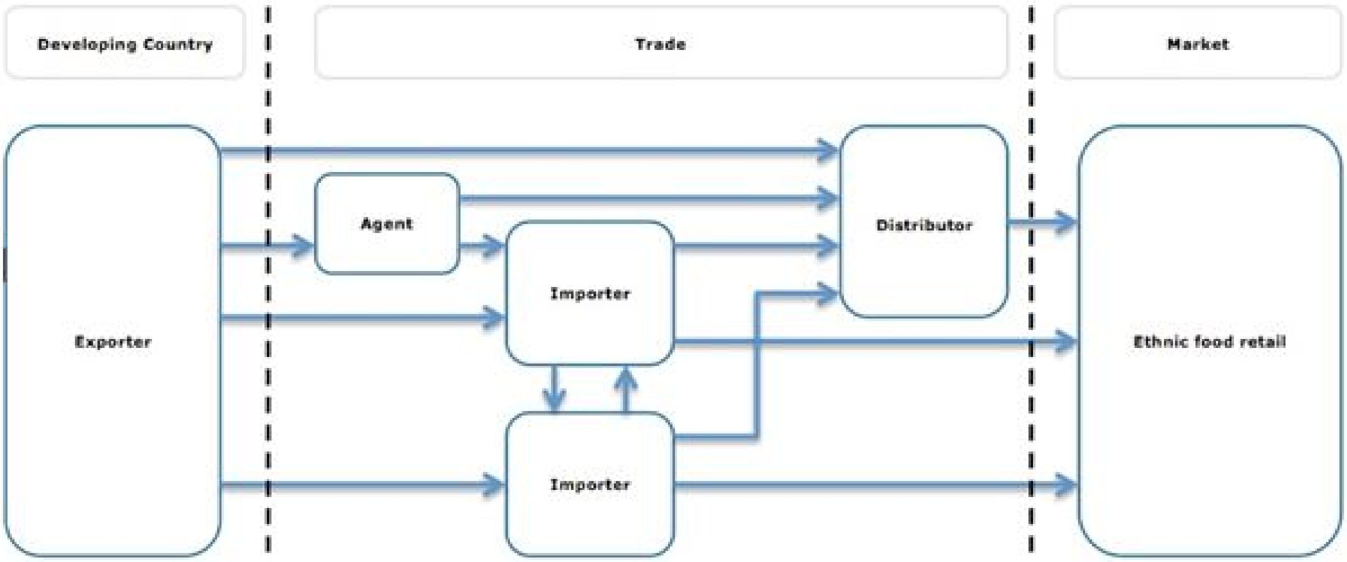
Each ethnic retail store has its own purchasing policy; while one may prefer to deal with a single distributor that offers all three main product ranges (groceries – fresh – frozen), another store will have different distributors for each range (and perhaps even two or more per range). Coupled with a relatively large number of distributors, this situation leads to a huge variety in frozen fish and seafood SKU ranges in the different stores.

Trade is not limited to national borders in Europe, although most importing companies typically register a considerable share (about 80–90%) of their turnover within their home country. Re-exports in Europe in this segment take place between UK and other countries (predominantly Italy), wile importers in the Netherlands also re-export to countries across Europe. A few German and Belgian importers also supply customers in other European countries.

The importing companies often work with suppliers from a certain country or range of countries. As a rule of thumb, the larger the importing company, the more professional the purchasing management. Large ethnic food importers (these with a broad a range of food products) typically are less risk tolerant than smaller importers.

In general, the longer the supply chain, the lower the margins for the exporter are. But this also depends on trade volumes, as large trade volumes usually have lower margins than small volumes. Keep in mind that the higher margin for smaller volumes is necessary, as the import costs are also relatively high when compared to those of importing larger volumes.

Figure 1: Market channels for fish and seafood products to ethnic food retail markets in the EU



Note that the ethnic food retail landscape is highly fragmented, with only a few retailer groups active in Europe. The lion's share of stores is family owned and run by (first and next generation) immigrants. Google maps can be used to find stores in a specific city or region, using keywords such as "Asian supermarket", "Asian grocery store", "African supermarket", "ethnic supermarket", etc. In each country, most stores are concentrated in the capitals and other large cities. In addition, in the biggest cities of Europe, there are dedicated Asian zones, also often known as Chinatowns. Examples are Soho in London, Quartiere Cinese or 8th quarter in Milano, Quartier Chinois or 13th Arrondisement in Paris, and Chinatown Zeedijk in Amsterdam.

7 . How to enter the European ethnic frozen fish and seafood market

As a potential fish and seafood exporter, you need to be aware of the following issues and steps:

1. The professional European importer only deals with trusted partners. Therefore, they prefer to audit the exporter's premises first. Therefore, the best start for exporters aiming at entering the European market is to find importers that are already importing frozen fish and seafood from their own country or from neighbouring countries. This definitely helps to establish the contact and to arrange for a meeting at your premises. Definitely the best place to meet with potential importers is the [European annual seafood event in Brussels (ESE)](#).
2. Even better are importers looking for a particular fish species or product variety that they do not

have yet. Importers who already buy products from other exporters will not easily shift to another supplier.

3. Although, on average, the requirements for the product in terms of certification and presentation are relatively low, this can be an opportunity to stand out from your competition:
   - Certification like MSC or ASC will certainly help in dealing with larger importers who typically want to avoid risks.
   - Customer education – Exotic fish or seafood from Asia or Africa may require an unusual preparation. Such a product will greatly benefit from customer education. In practice, the product package can be enriched with instructions and/or recipes explaining how to prepare and consume the contents. Another option is to help the importer to organise demonstrations or create animations for larger retailers.
   - Brand recognition in the chest freezers in ethnic food stores is rather limited. The development of a unique branding concept for your product range will certainly offer opportunities in the European market. There is one example of a company that stands out from the crowd in this segment: Sarangani Bay from the Philippines.
   - Anticipate the needs of the next generation by staying informed on the behaviour and requirements of the younger generation of ethnic consumers. Adapt your product presentation, form or packaging to meet these needs.