



[Exporting frozen soft-shell crab to Europe](#)

The soft-shell crab has a large benefit over normal crab: with its outer shell so soft, the crab can be eaten in its entirety, with no complicated tools to claw your way to the meat. The increasing popularity of soft-shell crab in Europe recently has led to growing pressure on the already dwindling supply from the several Asian supply countries. Overfishing has led to the collapse of many fisheries and a serious reduction in natural populations. For this reason, best opportunities in Europe and in particular in western and northern Europe, are for soft-shell crab sourced from areas where a sustainability program is in place. Read further below to get a hand on the details of the 30-50 40-foot shipping containers filled with crab that are shipped to the European market every year!

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1 . Product description

Crabs are decapod crustaceans of the *Portunidae* family. Their main characteristic is the last pair of pereiopods adapted into flattened paddles for swimming. Commercial exploration of swimming crabs is not new: in the United States of America it is more than 100 years old. When “crab” is referred to in this survey, this concerns the [Harmonised System](#) code 030614, unless stated otherwise. “Soft-shell crab” will be used in this report for a selection of frozen crab produced and sold as per below.

While there are more than 700 crab species worldwide, only a few of them are of commercial interest, and even fewer are suitable for cultivation/selling as soft-shell crabs. The three species concerned are: *Scylla*, *Portunus*, and *Callinectes*. In practice, the lion share of soft-shell crabs worldwide are *Scylla serrate* and *Scylla olivacea*, followed at quite some distance by *Portunus pelagicus* and *Callinectes sapidus*.

While some of soft-shell crab production stems from young crabs caught in the wild (this practice is also the largest threat to this industry, as overexploitation and habitat deterioration by human impact and climate change have put increasing pressure on the supply of young crabs), another

part are adult crabs in pre-molt stage caught in the wild that only stay on farms for a few days, until they shed their casks.

In fact, soft-shell crabs are only different from “common” crabs in the sense that they miss the hard outer shell. With its outer shell so soft, the crab can be eaten in its entirety, with no complicated tools to claw your way to the meat.

This section provides you with basic information about product specifications and import requirements in the EU, which is based on EU legislation. Important legislation is the recently renewed [Common Organisation of the Markets](#), which contains the rules of the organisation of the market for fishery and aquaculture products in the EU. Legislation about how to inform EU consumers about fishery and aquaculture products is also relevant to you. Below, you can find more specific information about the labelling, packaging, and processing of crab for the European market.

Labelling

The contents of labelling must be provided in the language of the country where the product is exported. When importing fishery and aquaculture products into the EU, the following information must be provided on the labelling or packaging of the fishery product, or by means of a commercial document accompanying the goods:

- The name of the product: The commercial and scientific name of the species. For this purpose, EU Member States publish a list of the commercial and scientific names accepted in its territory;
- Production [method](#): it must be mentioned whether it is a cultured product or wild catch;
- Origin: reference the country where they are produced;
- Net Weight: The net weight must be mentioned on pre-packed products;
- Date of minimum durability: Consisting of day, month, and year, in that order and preceded by the words “best before” or “best before end” or the “use by” date;
- EU seller: The name or business name and address of the manufacturer, packager or seller established in the EU;
- The package must contain an EU approval number;
- The packaging must also contain a lot number;
- Nutrition: Ingredients and nutrition must be mentioned;

Each EU Member State has a competent authority that is responsible for the implementation of EU regulation with respect to labelling.

Packaging and sizes

Products in consumer packaging are packaged in trays and cartons in various sizes depending on the product and requirements of the buyer. A common type of packaging is a 10 kg master carton (e.g. with the size of 45x27.5x47.5 cm, in that case one euro pallet can store 24 master cartons) with 10 x 1 kg with a number of crabs depending on the size class:

- Colossal 1-3 pieces/kg
- Whoppers 4-7 pcs/kg
- Whale 7-10 pcs/kg
- Jumbo 10-12 pcs/kg
- Prime 13-15 pcs/kg
- Hotel 18-20 pcs/kg
- Medium 24 pcs/kg



2 . Which European markets offer opportunities for exporters of frozen soft-shell crab in Europe?

This section provides you with more detailed statistics of frozen soft-shell crab trade and consumption in Europe. Note that statistics for frozen soft-shell crab are only available to a limited extent. Where necessary trade statistics of frozen crab in general will be used.

Imports of frozen crab

The major supply countries for frozen crab to the European market are located in or close to Northern Europe. The UK leads with 15% share in total supply value in 2017, followed by Norway (14%), Russia (9.7%), Denmark, Greenland, and Ireland (6-7% each). In total, these countries supply 60% of all frozen crabs consumed in Europe.

Another part comes from a few EU countries that to some extent are main re-exporters of frozen crab: France (4.7% share), the Netherlands (3.2%), Belgium (2.5%), and Spain (2.0%).

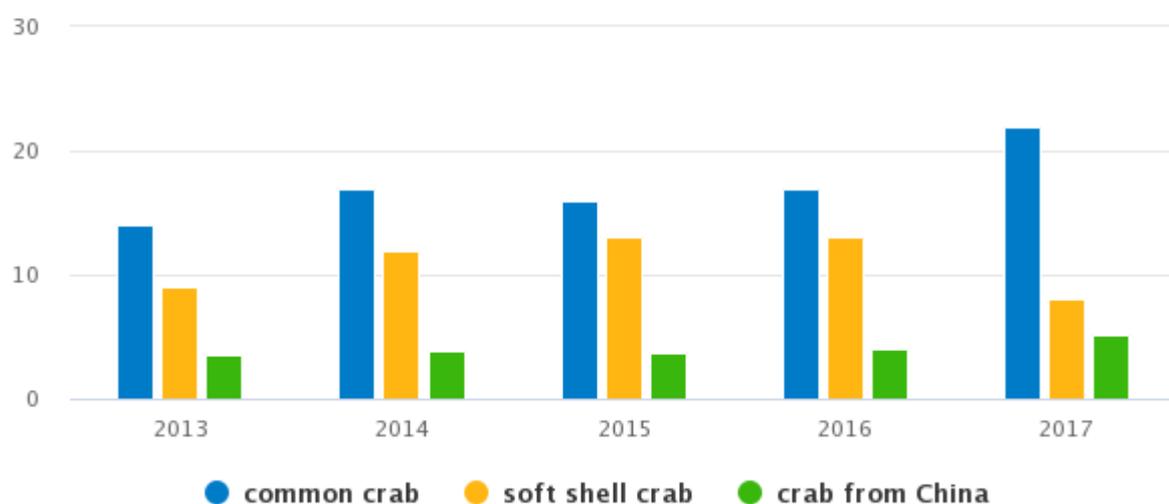
Frozen crab from developing countries account for 21% market share in Europe. The leading supplier in this group of countries is Namibia (5.6% share of total European imports), followed by China (3.0%), Vietnam (2.0%), and Chile, Madagascar, Thailand and Senegal (all with 1-2% market share). In addition, there is one country more that exported for more than €1 million to Europe: Tunisia (0.9% market share).

In terms of value, the European frozen crab imports reached €171 million in 2017. Frozen crab trade depends on global catches in the major supply countries a lot, which can be seen from the fluctuation in import value since 2013: from €177 million in 2013, it went up to €205 million in 2014, €213 million in 2015, before it peaked at €243 million in 2016 (and dropped sharply in 2017).

While the foregoing analysis was about frozen crab in total, Figure 1 and 2 show the import values of frozen crab originating from developing countries only. This is an important focus, as frozen soft-shell crab only comes from developing countries.

Figure 1: EU aggregate import value of frozen crab from developing countries plus United States of America 2013-2017

in € million



Source: Trademap 2018

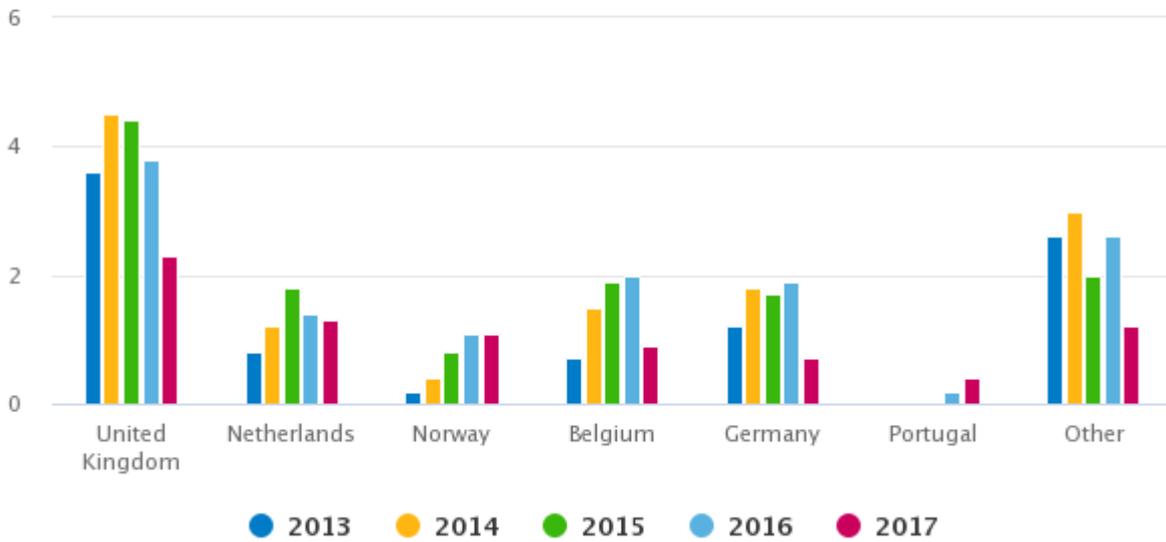
Figure 1 shows that import of frozen crab from developed countries to Europe is mostly common crab in 2017, while before 2017 the import value of soft-shell crab was only a bit lower than imports of common crab.

The soft-shell crab imports are an aggregate of import values of crab coming from Vietnam, Thailand, Bangladesh, India, and Indonesia, added with United States of America (USA). The USA is an important producer (and importer) of soft-shell crab and it can be assumed that the frozen crab exported to the EU is soft-shell crab. This aggregation assumes that these countries only supply soft-shell crab to the European market, and no common crab. In practice, some common crab could be exported too.

China is a particular case; while China is considered as the largest producer of soft-shell crab by a long way, the country is not known as an exporter of soft-shell crab. At the same time, Chinese exports of crab to Europe are considerable and larger than from any other Asian country. With this being the case, crab imports from China are shown separately in Figure 1.

Figure 2: EU import value of frozen soft-shell crab, by leading importing countries 2013-2017

in € million

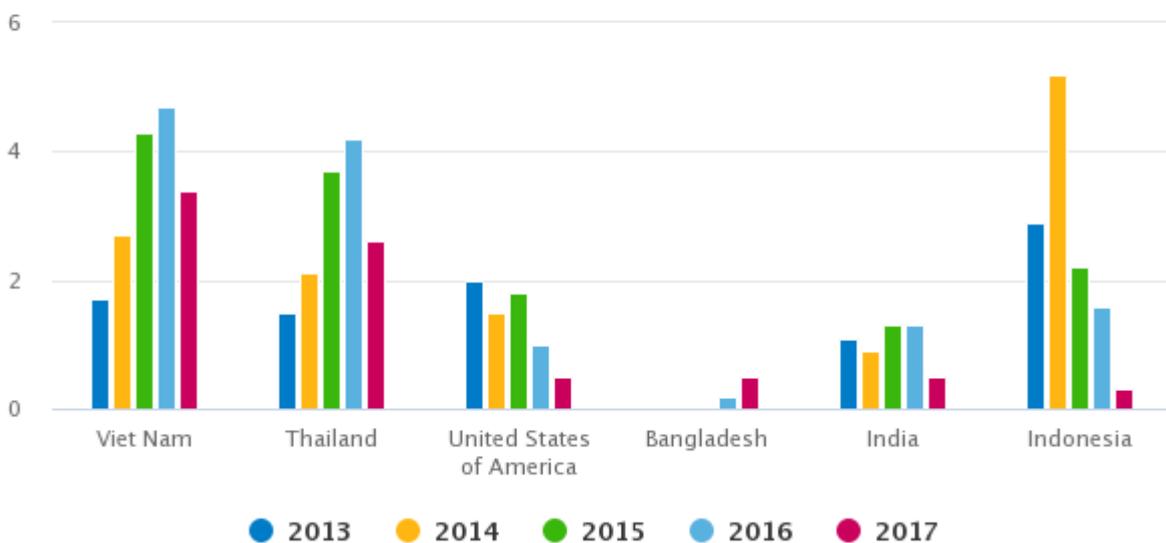


Source: Trademap 2018

Figure 2 reveals that the United Kingdom dominates imports of frozen soft-shell crab, at quite some distance followed by Belgium, the Netherlands and Germany. This finding is in line with opinions of trade experts in Europe. While the United Kingdom is an important destination market of mud crab, in the mainland of Europe the preference is for Blue Swimming Crab. Belgium and the Netherlands are also to some extent trade hubs, as several Dutch and Belgian traders re-export crab and also soft-shell crab to other countries in Europe (except the UK). Last but not least, Norwegian imports showed a considerable increase (more than 50% on average per year) in the period under review, resulting in a third place in 2017.

Figure 3: Leading suppliers of soft-shell crab to Europe 2013-2017

in € million



Source: Trademap 2018

Important producers of soft-shell crab are Indonesia and the Philippines, Vietnam, Thailand, and

United States of America. While China is said to be the largest producer by a long way worldwide, the country does not export soft-shell crab to the European market (or only small volumes). Figure 3 reveals that in 2017, Vietnam is the largest exporter of soft-shell crab to Europe, followed by Thailand, USA, Bangladesh, India and Indonesia. Indonesia has been among the top 3 suppliers to Europe in the past, but in 2017 export volumes were relatively low because most Indonesian soft-shell crab was exported to the United States of America.

Unfortunately, the data availability on global production of crab is rather limited for several reasons. On the one hand, small-scale production makes data gathering rather difficult, and on the other hand, when carried out on industrial scale, production data are confidential. The main trend that is clear from several sources, however, is the substantial growth in global production of soft-shell crab in the past decades, while in the recent 5 years; production has not increased that much anymore.

In terms of volume, it is estimated that some 30–50 40-foot shipping containers are shipped to the European market every year.

Vietnam exported about 250–280 tonnes of soft-shell crab to the EU in 2017, followed by Thailand (about 160–190 tonnes). Other countries exported substantially lower volumes to the EU; Indonesia, India and others exported probably between 30–50 tonnes in total to the EU.

Tips:

- Do more research on exporting countries by visiting the websites of national fish or seafood associations of these countries, such as [VASEP](#) in Vietnam or [AP5I](#) in Indonesia.
- Take a look at national sector associations that provide extensive information about active importers and exporters. Visit, for example, the website of [Dutch Fish](#).

Import prices

Typical import prices of soft-shell crab from Indonesia and Thailand are in the range of USD 15.50–17.50 per kilogram. Average prices were the highest in 2014 and 2015 with values of USD 21.9 and USD 18.9 per kilogram. There are no data of other supplying countries available, but most trade experts agree that Chinese soft-shell crab is the cheapest, because of the industry's economy of scale.

Exports

Data on exports are not available, but leading exporters of soft-shell crab within Europe are thought to be the Netherlands and Belgium.

Tip:

- Find companies that already import soft-shell crab, as these will have the most interest in additional suppliers. Use Google and search with “soft-shell crab” added with the Internet country code top-level domain (.nl for the Netherlands, for example).

The focus on sustainability offers opportunities on the European market

All over Europe but particularly in the western and northern part, consumers are increasingly

looking at the sustainability of the fish and seafood they eat. The key problem of global soft-shell crab production is the supply of crab juveniles from nature. In most countries it is reported that supply is decreasing due to over exploitation, habitat deterioration caused by man impact and world climate change. Adequate supply of mud crab seed for soft-shell mud crab farming has become an urgent need and should be part of sustainable farming programs in the production countries. Hatchery operations could be another solution, but there are some challenges with hatchery (low survival rates).

Tip:

- Work on a national sustainable farming programme for a sustainable future of the local soft-shell crab industry. Include key areas such as hatchery techniques, mud crab culture, or conservation of mud crab resources like setting up the protected area of no crab fishing zone or conservation of mud crab habitats such as mangrove.

3 . What requirements should frozen soft-shell crab comply with to be allowed on the European market?

Requirements can be divided into: 1) musts, which are legal requirements you must meet in order to enter the market and 2) common and additional requirements that buyers may request.

You can find a general overview of the [EU buyer requirements for fish and seafood](#) on the Market Intelligence Platform of CBI including many tips for how to get more details or how to meet these requirements. A summary of the requirements follows below, including some specific details for shrimps.

Legal requirements

These are the legal requirements for the import of crab into the EU:

- **Approved country and establishment:** Your country must be on the list of EU-approved countries in order for you to export seafood to the EU market.
- **Traceability rules:** It means that the label has to offer precise information on its harvesting and production. It applies to all unprocessed and some processed seafood, whether it is pre-packed or not. Find out [here](#) which processed seafood this applies for.
- **Catch certificate to combat illegal fishing:** To combat illegal fishing, (wild caught) fish imported or transhipped in the EU must be accompanied by a catch certificate.
- **Health certificate:** a health certificate must accompany the crab you export to the EU.
- **Hygiene above all:** There is a list of requirements that fishery products must meet, but to sum up many of these are related to hygiene. The implementation of HACCP is one of the measures you need to take, but the general hygiene of your establishment must also be good and is of key importance to potential buyers.
- **Contaminants - restricted and tested:** Contaminants that may end up in the food product as a result of various stages in the process or environmental contamination are restricted by EU legislation. Fish destined for the EU market is generally tested before shipped, sometimes in the buyer's own lab, sometimes in recognized (independent) labs, in order to prevent costly border rejections. For soft-shell crab, it may be about which chemicals may be used during the production, and which residues are allowed in the EU.
- **Microbiological contamination:** just like contaminants, microbiological contamination has restrictions and is therefore examined in the crab destined for the EU market.

Tip:

- Consult the [EU Export Helpdesk](#) for a full list of requirements, including those mentioned above but also specific labelling requirements for fish.

Common and niche requirements

For frozen soft-shell crab, additional requirements are mainly requirements with respect to food safety. The most commonly requested food safety certification schemes for seafood products are IFS and (or) BRC, and also GLOBAL GAP.

Tips:

- The International Trade Center (ITC) offers fact sheets on the several certification schemes, for example on [IFS](#) or [BRC](#).
- 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, as these companies expect a lot from their suppliers.

4 . Which channels can you use to put soft-shell crab on the European market?

For more general information about market segments and channels, take a look at [Market Channels and Segments for seafood products in Europe](#), which is available at the CBI market information platform. This section provides a few details about soft-shell crab.

Virtually all soft-shell crab is sold as frozen and ready-packed product to European importers or traders. Most large food service distributors that sell soft-shell crab do not source fish and seafood products themselves but make use of a few large importers as their preferred suppliers. The frozen crabs can arrive in Europe from overseas, but airfreight also takes place, mainly to Frankfurt Frischezentrum or Paris/Rungis.

In Europe, the ports of Rotterdam (the Netherlands), Antwerp (Belgium), and Hamburg, Bremen and Bremerhaven (Germany) are important distribution hubs for the transport of fish and seafood, including soft-shell crab, further into Europe.

Food retail is a relatively small segment for soft-shell crab. Food service takes a relatively large share (40–60%), with the balance left for ethnic food retail/service channels.

Tips:

- Discuss with your clients to better understand their customer's specific needs. Closely cooperate with your buyers on what the specific needs and requirements of their clients are and how to meet these needs and requirements (the food retail and food service markets in Europe in general have different characteristics and different needs).
- 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.

- Consider participating in the [Seafood Expo Global](#) in Brussels, the largest seafood trade show in Europe. This trade show gives you the opportunity to showcase your products and meet potential buyers from European countries.

5 . What are the end-market prices for frozen soft-shell crab?

Prices of soft-shell crab in the different European countries are presented below to give you an impression of the price level in Europe.

Table 1: Prices for soft-shell crab in 2018

Product	Price (€/kg)	Country
Soft-shell crab, 15-18 pieces in a 1 kg box	45.90 (online webshop)	Belgium
Soft-shell crabs, Cleaned Hotel 20-24 6x1 Gr- VN	24.20 (importer's sales price)	Netherlands
Whole soft-shell crab	Upon request	Spain
Soft-shell crabs	Upon request	Germany
Frozen soft-shell crab	30.00 (online webshop)	Netherlands
Frozen soft-shell crab	35.51 (online webshop)	United Kingdom
Soft-shell crabs x 12, Frozen,1 kg	71.10 (online sales through Amazon)	United Kingdom

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