

Exporting vannamei shrimp to Europe

The whiteleg shrimp, often called Vannamei (*Litopanaeus vannamei*) is one of the most popular cultured shrimp species in the world. Europe will offer good opportunities to Vannamei shrimp exporters in the next few years as the demand for cheaper shrimps, such as Vannamei shrimps, is expected to increase at the expense of black tiger shrimp imports.

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1. Product description

The whiteleg shrimp (*Litopanaeus vannamei*) is part of the *Penaediae* family. Other species in this family are *P. setiferus* (Atlantic white shrimps) and *P. indicus* (Indian prawn). When “cultured Vannamei shrimp” is referred to in this survey, this concerns the following [Harmonised System](#) codes, unless stated otherwise:

- 030613 - Frozen shrimps and prawns
- 030617 - Frozen shrimps and prawns
- 160520 - Shrimps and prawns
- 160521 - Shrimps and prawns, not in airtight containers
- 160529 - Shrimps and prawns, in airtight containers

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 Vannamei shrimps 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](#): In the case of the Vannamei shrimps, it must be mentioned that it is a cultured product;
- Origin: In the case of the Vannamei shrimps, reference the country where they are produced;
- Presentation: It must be mentioned how the product is processed (whole, which is Head On Shell On (HOSO), shell on (SO), peeled tail on (PTO), peeled undeveined (PUD) or peeled and deveined (P&D), tail-on, butterflied);
- 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

Packaging requirements differ widely between customers and market segments. Therefore, it is crucial that you discuss your customers' preferred packaging requirements. Some general characteristics are:

- Frozen Vannamei shrimps are mostly imported in cartons or bags with a certain amount of prawns in it (for example, 30/40, 40/50, 50/60, etcetera, pcs/kg);
- B2B frozen Vannamei shrimps are often imported as 5 to 25 kg bulk, and also as 1-5 kg block frozen.

Processing and colour

- Colour:
 - Raw: Translucent, bluish or olive with dusky bands, and characteristic white legs. Translucent white bluish peeled meat.
 - Cooked: Bright red shell and white meat.
- Preferred processing depends from country to country: presentation types: whole (HOSO), but also shell on (SO), peeled tail on (PTO), peeled undeveined (PUD) or peeled and deveined (P&D) and tail-on. In the south of Europe (countries such as Spain, France, Portugal, Italy), raw HOSO shrimps are preferred for the cooking industry. In northern Europe (countries such as the Netherlands, Germany, Belgium, the UK, Sweden, Finland, Denmark), retail PUD shrimps are popular.
- In the EU, the Vannamei shrimps are measured by pieces per kilogram (pc/kg). For Europe, around 40-50 pc/kg and 50-60 pc/kg are preferred.
- Glazing: Usually 10% declared on packaging

2. Which European markets offer opportunities for exporters of cultured Vannamei shrimp in Europe?

This section provides you with more detailed statistics of shrimp trade and consumption in Europe.

Imports of Vannamei shrimps

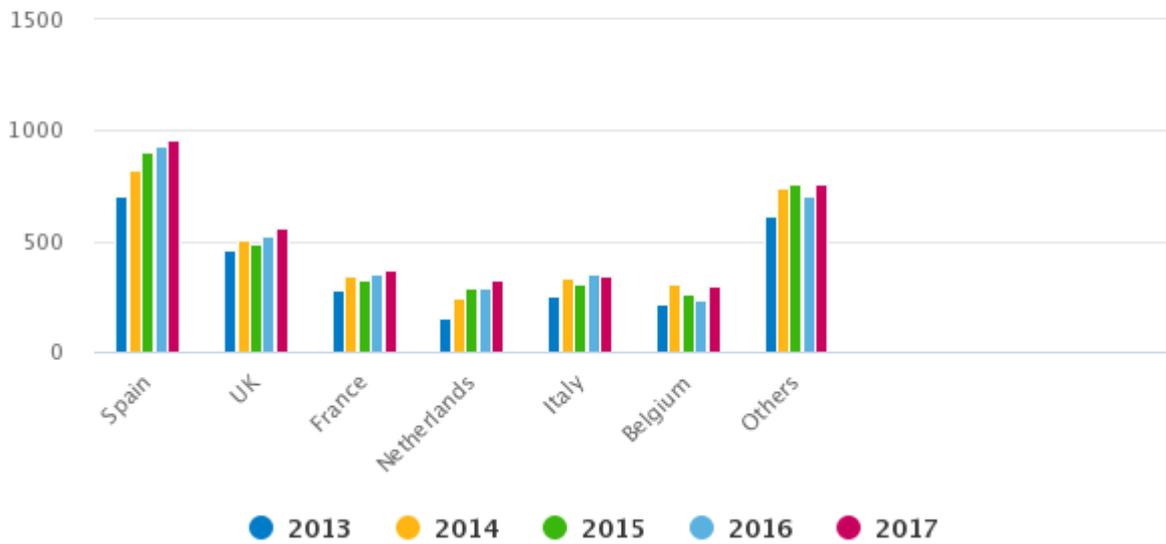
The major export countries for Vannamei shrimps are Ecuador, Argentina, Vietnam, India, Thailand and Indonesia. Vannamei shrimps account for approximately 100% of total shrimp exports in Ecuador, Argentina and Thailand, while the other countries are also suppliers of Monodon shrimp.

Northern European countries mainly import their shrimps from the countries that produce both Monodon and Vannamei shrimps. Spain, France, and Italy import mainly Vannamei shrimps from countries that mostly produce Vannamei shrimp.

Note that the data in Figure 1 covers not only Vannamei but also Monodon shrimps.

Figure 1: EU import value of frozen and prepared shrimps from outside the EU 2013–2017

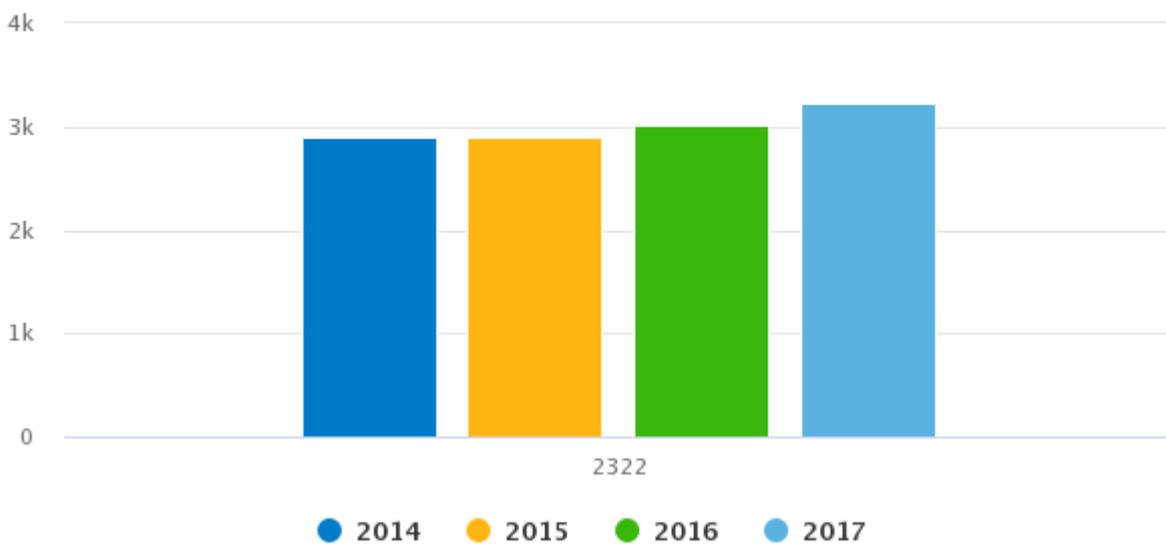
in € million



Source: Trademap 2018

Figure 2: EU import value of frozen and prepared Vannamei shrimps 2013–2017

in € million



Source: Trademap 2018

In 2017, the total import value of frozen and prepared shrimps and prawns to the EU amounted €4.2 billion. Vannamei shrimp accounted for more than 70% of this total, which is approximately €3.1 billion in 2017. Compared to 2013, the import value of Vannamei shrimp in 2017 increased by 33%. The import quantities increased less than the value during this period, which was the result of the worldwide price increase of shrimps due to the global supply crisis caused by the Early Mortality Syndrome (EMS).

The two largest suppliers of Vannamei shrimp, Ecuador and Argentina, account for the majority of EU imports (€2.4 billion). This means that more than 75% of the total EU imports comes from these two largest suppliers.

The average import price of frozen shrimp differs widely within Europe. In 2017, the import price for frozen shrimp per kilogram was the lowest in Slovakia (€2.58) and Croatia (€3.40). Countries with the highest prices were Germany (€9.82), UK (€9.68) and Sweden (€9.52). The average import price of frozen shrimp increased from €6.12 per kg in 2013 to €7.45 in 2017. This price increase is partly caused by the global supply shortage caused as mentioned before. Another reason is the increasing competition for raw material caused by problems with Chinese production. Although these issues are partly solved by increasing production in India and Indonesia, the prices of frozen shrimp keeps increasing.

Tips:

Do more research on these exporting countries by visiting the websites of [VASEP](#) or [MPEDA](#).

Visit the websites of [Globefish](#) or the European market observatory for price information about fishery and aquaculture products.

Take a look at national sector associations that provide extensive information about active importers and exporters. Visit, for example, the website of [Dutch Fish](#).

Gather data about market developments of Vannamei shrimps and other shrimp species. [Globefish](#) provides quarterly information on developments in the global seafood market.

Exports

In 2017, the Netherlands was the largest (re-)exporter of shrimps (around €528 million) in the EU, accounting for approximately 25% of total European exports. The second and third largest (re-)exporters of shrimps in the EU in 2017 were Belgium (€390 million) and Spain (€309 million). Globally imported shrimps enter Europe via the port of for instance Rotterdam (Netherlands) and Antwerp (Belgium), from where they are distributed to the surrounding EU markets. The most important (re-)export markets for the Netherlands are Germany, Belgium and France. Belgium (re-)exported mainly to France, the Netherlands and Germany, while Spain (re-)exported mainly to Italy, Portugal and Germany in 2017.

The price difference between import and re-export was highest for Spain. This can be attributed to the large processing industry in that country. Spain imports large volumes of cheap raw shrimp materials (mostly from Argentina and Ecuador), and after cooking and packaging a small share of total output is re-exported.

Tip:

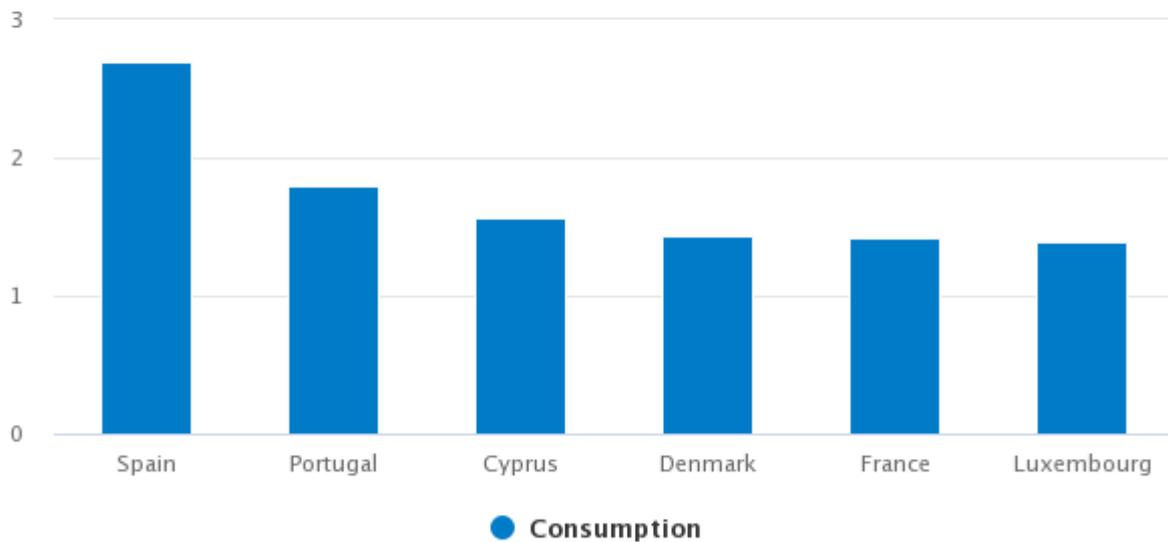
Search the exporter databases of European companies for further information about re-exports. Visit, for example, the importer exporter database of [Dutch Fish](#).

Consumption

The average consumption of shrimp per capita in 2017 in Europe is shown in Figure 3. Note that the data in the figure covers not only Vannamei shrimp but also Modonon shrimp. It is very difficult to calculate the apparent consumption of only Vannamei shrimp in Europe as imported shrimps are often being reprocessed inside the EU and values and volumes change.

Figure 3: Apparent consumption of cultured vannamei shrimp per capita in Europe 2017

kilogram, by country



Source: Eurostat Prodcop 2018

Countries such as Spain, Italy, and France import raw material to a large extent, mostly HOSO, as a source for domestic shrimp cookeries. Northern and western European countries, on the other hand, import more cooked or peeled shrimps.

As mentioned earlier, northern and western European countries predominantly import their shrimps from Asian countries, while southern European countries tend to source mainly from South American countries.

Import prices per kilogram are higher in western Europe than in southern Europe. This is mainly explained by the fact that Spain and France import large volumes of cheap Vannamei raw materials for their domestic shrimp cookeries. Western European buyers tend to purchase more value-added products and products that are already cooked, resulting in higher import prices. This situation is expected to remain the same in the coming years as the shrimp cookeries in France and Spain are not expected to outsource their processing activities to Asia or South America.

Tips:

Find information about consumer preferences for shrimp products on the websites of large retailers in the different EU Member States such as Albert Heijn (the Netherlands), Eroski (Spain), Carrefour (France), Sainsbury's (United Kingdom), and Metro (Germany).

Make sure your marketing employee speaks the language when you do business in southern Europe (e.g. when doing business in Spain, it is recommended to speak Spanish).

3. What trends offer opportunities on the European market for cultured Vannamei shrimp?

[CBI Trends for frozen shrimps](#) provides you with general trends in the European frozen shrimp market. This section provides specific details for cultured Vannamei shrimp.

Importance of sustainability certification is increasing

On the European market, the northern region is one of the most progressive and critical regions with regard to responsible and sustainable food production. ASC certified shrimp became available at the end of 2014 in the Scandinavian market, followed by other countries in northern and western Europe in 2015. Currently, ASC is also gaining in importance in other parts of Europe. Currently, about 100 Vannamei shrimp producers are ASC certified.

Tips:

Consider the benefits of ASC certification for your company. The [ASC website](#) provides useful information on the certification process of shrimps and possibilities to get support.

Consider organic Vannamei shrimps as a potential niche product for your marketing plan.

Consumer awareness

European consumers want to know where their food comes from and how it is produced or caught. The shrimp farming sector, particularly in Asia, has received negative attention in Europe. Negative impact on communities and the environment by the shrimp sector has been criticized. As a supplier, you need to invest in transparency and sustainability to increase your potential in Europe.

Convenience food

In Europe, demand for convenience food is on the rise due to busy lifestyles and time pressure. Consumers prefer meals that are easy to prepare and easy to cook. Easy-to-cook meals often also need to be inexpensive, meaning that Vannamei shrimp will be preferred most of the time. If you can serve this market with inexpensive PUD products, this can be an opportunity for you in the future.

Value-added

Although most of the imported shrimps in Europe are HOSO, there is a trend towards more ready-to-eat products. Discuss with your clients the potential of value-added products on the European market in the form of e.g. marinated shrimps or skewers.

Tips:

Make a plan with your buyer to find niche markets to sell your Vannamei shrimps to Europe.

Go to the seafood fairs in [Brussels](#) and [Vigo](#), as they provide you with relevant information about trends in the seafood market and facilitate interesting contacts with potential buyers.

Price advantage of Vannamei shrimp

The price advantage of Vannamei shrimp is increasing due to the rising prices for black tiger shrimp. The increasing demand and lower supplies of premium black tiger shrimp drive this price increase, which results in a greater premium to Vannamei shrimp. This trend is expected to continue and it is therefore expected that more and more buyers will buy Vannamei shrimp.

Quality issues

The use of antibiotics in Vannamei shrimp cultivation has emerged as a threat to the export of shrimp. In 2017 a few Indian seafood exporters were banned of imports to European countries mainly due to the detection of antibiotics residues. European countries have zero tolerance limits for antibiotics in contrast to some other countries. The sampling scale of European countries has increased due to these quality issues from 10 percent to 50 percent and could eventually be increased to 100 percent.

Tip:

Search for information in the database of the [Rapid Alert System for Food and Foodstuff \(RASFF\)](#) to know which shrimps have been withdrawn from the market and why.

4. What requirements should cultured Vannamei shrimps 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.

5. Legal requirements

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

- **Approved country and establishment:** Your country must be on the list of EU-approved countries in order for you to export fish 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 to.
- **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:** The fishery products you export to the EU must be accompanied by a health certificate.
- **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 Vannamei shrimp, it is about which chemicals may be used during the production, and which residues for Vannamei shrimp are allowed in the EU.
- **Microbiological contamination:** just like contaminants, microbiological contamination has restrictions and is therefore examined in the fish destined for the EU market.

Tip:

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

6. Common and niche requirements

For shrimps, 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, such as on [IFS](#) or [BRC](#).

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

Consumption of organic seafood continues to increase year on year, as consumers are increasingly aware about what they eat. In the EU, sustainability certification was for a long time seen as a niche market requirement, however, sustainability certification has become a more common buyer requirement. Especially shrimp is more and more organically farmed. Organic Vannamei shrimps are mostly sourced from Ecuador.

For wild-caught fishery products, MSC is the major certification scheme, while ASC is the most important certification scheme for aquaculture. As can be read in the section on trends, the first ASC certified shrimp became available in the European market at the end of 2014.

Producing Vannamei shrimp organically and achieving organic certification can boost your business opportunities in the European market. One leading organic certification scheme in Europe is Naturland (from Germany). Naturland is an association for organic agriculture. Naturland was created in Germany in 1982. Since the mid-nineties, Naturland is very successful in conducting organic aquaculture projects.

Tips:

Visit the [ASC website](#) for useful information on the certification process for shrimps and possibilities of obtaining support.

Visit the website of [Naturland](#) to find out the possibilities for farming organic shrimps.

Find information about organic certification on the [website of the EU](#).

Through what channels can you get cultured Vannamei shrimp on the European market?

This section provides detailed information about the various marketing channels through which Vannamei shrimps are marketed in Europe.

Large Vannamei importers have their own quality agents at origin to check the quality of the shrimp products. These checks can be a final inspection at the end of the production chain or monitoring throughout the process.

The general trend in Europe is to shorten the supply chain. Retailers and food service companies are starting to buy directly from the source to an increasing extent. If you want to supply retailers or food service companies

directly, supply volumes and consistency of supply are crucial. However, as Vannamei shrimp is often sold in smaller volumes, most of the products are still imported by traditional import companies.

Imported fishery products enter Europe either by ship or by air freight. Frozen cultured Vannamei shrimps are mainly transported by ship. Important ports in Europe are Rotterdam (the Netherlands), Antwerp (Belgium), Hamburg or Bremen (Germany), and Marseille (France).

In general, more and more people are buying shrimps at the supermarket for preparation at home, instead of eating these shrimps at restaurants. This is to the advantage of Vannamei shrimp as the share of Vannamei shrimp on the retail market is on the rise as a result of price-oriented consumers. Unfortunately, there is no information available regarding the share of Vannamei or Monodon in supermarkets. This will also vary widely from country to country.

Although the out-of-home segment for tropical shrimp traditionally uses mostly Monodon product because of its preferred taste and sizes, the economic crisis is causing Vannamei to be preferred to an increasing extent on account of its price. Monodon is still preferred only in really high-class restaurants and in southern Europe. This is an opportunity for you, if you can supply larger size Vannamei shrimp at a lower price than Monodon.

Retail groups in Europe often have different formulas, varying from premium supermarkets to discount stores. In most cases each formula has its own purchasing and distribution system. Large retail groups do not import directly from exporters from developing countries, preferring to source from a small number of large importers.

Although the food-service segment represents considerable shares of food and also seafood consumption in Europe (note that shares differ a lot from country to country), the food-service segment in Europe is rather fragmented. Only a few food-service players operate on a multinational level and the food-service market segmentation differs a lot from country to country.

Tips:

Be aware of the differences between the retail segment and food-service segment in Europe. Discuss with your clients what the differences are between the retail segment and the food-service segment to better understand their specific needs.

Be transparent and give your buyer the possibility to monitor the overall production process.

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 foodservice companies, as these companies expect a lot from their suppliers.

Try to invest in a product that is suitable for selling in supermarkets. Take a look at supermarket websites to see their assortments.

Find out which large import and wholesale companies trade with large retailers in Europe if you are aiming to supply your products to the retail segment in Europe. Large companies that supply to the retail segment include [Deutsche See](#) in Germany, [Galana](#) in Belgium or [Heiploeg](#) and [Klaas Puul](#) in the Netherlands.

Consider participating in the Seafood Expo Global in Brussels or [Conxemar](#) in Vigo (Spain), the largest seafood trade shows in Europe. These trade shows give you the opportunity to showcase your products and meet potential buyers from European countries.

7. What are the end-market prices for cultured Vannamei shrimp?

Consumption prices of shrimp products in the different European countries are presented below to give you an impression of the price level in Europe.

Table 1: Consumer prices for Shrimp in 2018

Product	Price (€/kg)	Country
Organic shrimps in a 225g plastic bag	24.90	Netherlands
Organic shrimps in a 150g plastic box	37.45	United Kingdom
Shrimps 100g in plastic box	30.40	France
Frozen shrimps 500g in bag	19.18	Spain
Frozen shrimp 800g in bag	15.62	France
Frozen shrimps 500g in bag	19.18	Spain
Organic shrimps 250g	42.26	Switzerland

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