CBI Product Factsheet:

Bivalves in Europe
**Introduction**

The European bivalves market is a very broad market covering mussels, oysters, scallops, and clams. Although with the exception of scallops all bivalves are produced in Europe, the European market definitely offers opportunities to bivalves from outside Europe. France, Belgium and the Netherlands are the largest import markets for scallops and offer good opportunities for the introduction of new, exotic bivalve species.

**Product description**

Bivalves is a generic name for a group of molluscs that include mussels, oysters, scallops, and clams, among others. Most bivalves are cultured. However, for some species, the seed is first collected by fisheries and further grown through aquaculture. The HS codes that refer to bivalves are included in chapter 0307, and are given in table 1. Since 2012, the following HS codes for bivalves are applied:

**Table 1: HS codes for bivalves since 2012**

<table>
<thead>
<tr>
<th>HS Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>030711</td>
<td>Live/fresh/chilled oysters</td>
</tr>
<tr>
<td>030719</td>
<td>Frozen oysters, smoked, dried, salted or in brine</td>
</tr>
<tr>
<td>030721</td>
<td>Live/fresh/chilled scallops</td>
</tr>
<tr>
<td>030729</td>
<td>Frozen scallops, smoked, dried, salted or in brine</td>
</tr>
<tr>
<td>030731</td>
<td>Live/fresh/chilled mussels</td>
</tr>
<tr>
<td>030739</td>
<td>Frozen mussels, smoked, dried, salted or in brine</td>
</tr>
<tr>
<td>030771</td>
<td>Live/fresh/chilled clams, cockles, and ark shells</td>
</tr>
<tr>
<td>030779</td>
<td>Frozen clams, cockles, and ark shells, smoked, dried, salted or in brine</td>
</tr>
<tr>
<td>030781</td>
<td>Live/fresh/chilled abalone</td>
</tr>
<tr>
<td>030789</td>
<td>Frozen abalone, smoked, dried, salted or in brine</td>
</tr>
<tr>
<td>030791</td>
<td>Live/fresh/chilled molluscs</td>
</tr>
</tbody>
</table>

**Processed products**

<table>
<thead>
<tr>
<th>HS Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>160553</td>
<td>Prepared or preserved Molluscs: Mussels</td>
</tr>
<tr>
<td>160556</td>
<td>Prepared or preserved Molluscs: Clams, cockles and ark shells</td>
</tr>
</tbody>
</table>

**Product specification**

This section provides you with basic information about specifications for fishery and aquaculture products in Europe. Important legislation is the recently renewed Common Organisation of the Market, 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 for you. Below, you can find more specific information about the labelling, packaging, and processing of bivalves for the European market.

**Labelling:**

The contents of labelling must be provided in the language of the country where the product is exported to. 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 commercial and scientific name of the species: For this purpose, Member States publish a list of the commercial and scientific names accepted in its territory;
- Production method: In the case of farmed bivalves, it must be mentioned that it is a cultured product. When the product is caught, the FAO catch area must be mentioned;
- Origin: In the case of bivalves, the country where it is produced must be referenced;
- Presentation: It must be mentioned how the product is processed (for frozen products with or without shell, smoked, dried, cooked, salted or in brine; for fresh or chilled products with or without shell);
- 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 for bivalves differ widely between customers and market segments. Therefore, it is crucial that you discuss your customers’ preferred packaging requirements with them. Some general characteristics are:
Scallops are traded in bags of 1 or 10 kg, but can sometimes also be imported in 1 kg tins;
Large mussels are packed in bags of 5 or 10 kg, while smaller bags of 1 kg that are directly distributed to retail are also produced. Smaller mussels produced in Spain or Chile often are sold in polybags;
Clams are mostly traded Individually Quick Frozen IQF in polybags. Each product is individually frozen, which makes it easier to work with than block-frozen products where all products are frozen together;
In the EU, innovative packaging such as baskets or wooden boxes is often used to add value to the product for sales especially to retail or direct sales from the production site to customers.

Processing:

- Scallops: often without shell, sold roe-on or roe-off;
- Mussels: cooked with or without shell (mussel meat), sometimes also half shell;
- Clams: with shell;
- Oysters: with shell.

What is the demand for bivalves in Europe?

General information and figures about production and trade developments in Europe are provided in CBI Trade Statistics. This section provides you with more detailed statistics of the trade and consumption of bivalves in Europe.

Imports

- In 2014, total European imports of frozen scallops amounted to 35,000 tons with a value of €354 million. Imports from outside Europe (which are shown in Figure 2) made up more than 60% of this value.
- Total imports of fresh or chilled scallops in 2014 equalled €130 million, of which 14% came from outside Europe. With €17 million, the USA almost solely takes account of the export of fresh or chilled scallops to Europe from third countries.
- The downward trend in imports since 2011 is primarily caused by the negative impact of the economic crisis on seafood consumption in Southern European countries like Spain and Portugal.
- EU imports of frozen scallops from third countries mainly come from Northern America and Latin America. In 2014, Peru was the main supplier of frozen scallops, accounting for €70 million. Other important suppliers in 2014 were the USA (€57 million), Argentina (€26 million), Canada (€43 million), Japan (€14 million), and Vietnam (€6.4 million).
• Imports of frozen scallops from Peru recovered in 2013 following production problems caused by algae and continued to improve in 2014. Imports from Argentina declined in 2012 and 2013 but consolidated in 2014.
• From 2012 on, trade statistics for prepared bivalves are also available. In 2014, €130 million of prepared mussels were imported, of which €93 million came from Developing Countries. Most of them came from Chile, representing a value of €92 million. The import value for prepared clams in 2014 totalled €71 million. Imports from Developing Countries accounted for almost 50% (€34 million), with Vietnam leading (€20 million), ahead of Turkey (€7.5 million) and Chile (€5.0 million).
• As there are several scallop farming initiatives around the world, global supplies might increase in the medium to long term. On the other hand, there are also signs that the acidification of oceans might have a negative effect on the catches of scallops and other bivalves. It is therefore important to remain informed about developments in the supply of scallops and new farming initiatives.

Exports
• European exports of oysters, mussels, scallops, and clams totalled €857 million in 2014. Almost 90% of this value had an intra-European destination. Most of these products are produced in Europe and do not come from outside Europe.
• The top export products in 2014 were fresh or chilled mussels (€189 million), frozen scallops (€148 million), fresh or chilled scallops (€117 million), and fresh or chilled oysters (€99 million). Spain and the Netherlands are the main exporters of mussels, while France is the most important exporter of oysters. Scallops are mostly exported by the UK. All the countries mentioned above produce a lot of these species themselves.

Consumption
• According to FAO statistics, the average seafood consumption per capita in Europe is between 20 and 25 kilograms, ranging from more than 50 kilograms per capita in Portugal to only about 5 kilograms per capita in Bulgaria. There are no detailed EU consumption data for bivalves available.
• In general, consumption of bivalves in Europe is highest in countries in southern Europe like Spain, France, Portugal, Italy, and Greece.
• There are more than 40 commercial species of scallops. In Europe, the great Atlantic scallop (Coquille St. Jacques) and the Queen scallop are most popular. Imported scallops are Sea scallops from the USA and Calico scallops from Latin America.
• Consumption of bivalves in EU Member States in central and eastern Europe is relatively low compared to other parts of Europe because most consumers are not familiar with these products. As the economic situation in most of these countries is improving, there are opportunities for positioning bivalves in the high-end segment, such as high-class restaurants or hotels.

Tips:
• Globefish provides periodical market information about the market for bivalves. Here you can find a list of market reports that have been published in recent years.
• This FAO database provides information about the global consumption of seafood.
• Try to find processing companies in Europe that already re-export seafood products to central and eastern Europe to discuss the market potential of bivalves in these countries.

What trends offer opportunities on the European market for bivalves?
The CBI Market Information Portal provides you with general trends in the European market for whitefish, tuna, and shrimp. This section provides more details about specific trends for bivalves in the European seafood market.

Diversification and changing consumer patterns
The trend towards diversification of seafood products in the European market also holds opportunities for new species of bivalves. As there is already an existing market for mussels, oysters, clams, scallops, and cockles, a comparable but new species of bivalve can have potential for entering the market. Another reason is that consumer patterns are changing and there is more interest in different eating cultures, in the oriental kitchen, for instance. As most species of bivalves are supplied in high-end market segments, competition is not mainly based on price but more on quality and food safety aspects.
Increasing competition of BRIC countries with EU buyer markets

Like with other seafood products, the increasing demand for seafood from BRIC countries (Brazil, Russia, India, and China) can put pressure on the European market for scallops. According to Globefish, Chilean mussel producers are targeting the Brazilian market, as the Brazilian government’s objective is to increase the per capita consumption of seafood from 6 to 8 kg per year. For high-end market segments in these BRIC countries, exclusive bivalves like oysters or scallops can be of interest.

Supplies of bivalves become more international

Although Europe has a sufficient own supply of bivalves, the continent is also importing bivalves from a growing number of countries all over the world. Scallops for instance are produced in Europe, North America, Latin America, and Asia. With the seafood market becoming more internationally oriented, it is important to gain insight into the latest developments in production and trade for bivalves. Moreover, take into account that in Europe, cultivation of bivalves increasingly has to deal with spatial restrictions, which can limit the growth in production.

Sustainability certification of bivalves becomes important

Sustainability certification is becoming increasingly important in Europe. Although the main focus is currently on wild caught fish and farmed products like shrimp or Pangasius, it is expected in the long term that the capture and farming of bivalves will also need to be certified to maintain access to the European market, at least in northern Europe. Several fisheries for mussels, clams, scallops, and oysters already have been certified with the MSC trademark. Furthermore, ASC has developed a standard for the certification of cultured bivalves.

Tip:
- Discuss with your buyers which bivalves have good opportunities to access the market and what specific requirements are needed.

Tip:
- The increasing competition between BRIC countries and Europe provides opportunities for market diversification for exporters from Developing Countries. It is worthwhile to investigate the main market differences between the European market and some of the BRIC countries.

Tip:
- Gather data about market developments of bivalves. Globefish provides quarterly information about developments in the global seafood market, and special market reports for bivalves.
- This report from Seafish in the UK provides relevant information about the global market for scallops and characteristics of the production of scallops. Also read this factsheet about the production of mussels in the Netherlands.

Tip:
- The websites of MSC and ASC provide further information about the standards for bivalves and the products that already have been certified.
What requirements should bivalves 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, 2) non-legal requirements, which are those most of your competitors have already implemented, in other words, the ones you need to comply with in order to keep up with the market; and (3) additional requirements for specific segments.

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 bivalves.

What legal requirements must my product comply with?

These are the legal requirements for the import of bivalves 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.
- **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.
- **Microbiological contamination:** just like contaminants, microbiological contamination has restrictions and is therefore examined in the fish destined for the EU market.

**Tip:**
- For a full list of requirements, including the ones mentioned above but also specific labelling requirements for fish, please consult the EU Export Helpdesk where you can select your specific product code under chapter 03 or 16.

What additional requirements do buyers often have?

For bivalves, 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 sometimes also GLOBAL GAP.

**Tip:**
- **Tip:** The International Trade Center (ITC) offers fact sheets on the several certification schemes, e.g. on IFS or BRC.

What are the requirements for niche markets?

In the EU, sustainability certification is still seen as a niche market requirement, although sustainability certification has become a buyer requirement for several large retail and food service companies in some European countries (e.g. Germany). For wild-caught fishery products, MSC is the major certification scheme, while ASC is the most important certification scheme for aquaculture. Another sustainability certification is FOS (Friend of the Sea).

For Bivalves the situation for these three certifications is as follows:

- **ASC** has a separate standard for bivalves, finalised in 2011.
- Several fisheries on mussels, oysters, clams, cockles and scallops already have been certified by MSC.
- Some fisheries on clams, scallops, and mussels are certified by FOS.
What do the trade channels and interesting market segments look like in Europe for bivalves?

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 some detailed information about the various marketing channels through which bivalves are marketed in Europe.

Figure 4: Market channels and segments for bivalves in Europe

- Imported fish enters the country either by shipping or by airfreight. Frozen bivalves are mainly transported by ship. Important ports in Europe are Rotterdam (the Netherlands), Antwerp (Belgium), Hamburg or Bremerhaven (Germany), and Marseille (France).
- Re-export of bivalves to other European countries occurs between northern and southern Europe. The value of re-exports of bivalves to countries in central and eastern Europe is relatively low.
- 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. With the exception of a few large retailers (e.g. Carrefour, Metro), retail groups do not import directly from exporters from Developing Countries, but source from a small number of large importers.
- The food service segment can be an interesting segment for bivalves. Bivalves are mainly consumed in high-end or middle class restaurants, because in most cases they are exclusive products.
- 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:

- If you want to access the European market, the leading European ports have important logistic facilities from where products are further distributed. It is recommended to make use of the facilities in these ports if you want to distribute your products further into Europe.
- If you are aiming to supply your products to the retail segment in Europe, find out which large importing and wholesaling companies trade with large retailers in Europe. Large companies that supply to the retail segment are Deutsche See in Germany, Lenger Seafoods in the Netherlands or Marine Harvest.
- Even more for food service than for food retail, Developing Country exporters should focus on one or a few key countries, as most countries have their own trade channels and importers.
- Food retail and food service markets in Europe in general have different characteristics and different needs. Cooperate with your buyers on what the specific needs and requirements of their clients are and how to meet these needs and requirements.
- Many important EU buyers of seafood products are attending the annual European Seafood Exposition in Brussels. A visit to this exhibition provides you with relevant information about trends in the seafood market and interesting contacts with potential buyers of bivalves.

Useful sources

- EU Export Helpdesk
- Globefish market reports
  - [http://www.globefish.org](http://www.globefish.org)
- Marine Stewardship Council
  - [www.msc.org](http://www.msc.org)
- Aquaculture Stewardship Council
  - [www.asc-aqua.org](http://www.asc-aqua.org)
- Seafish Responsible Sourcing Guide: scallops
- European Seafood Exposition
CBI Market Intelligence

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This survey was compiled for CBI by Globally Cool – Creative Solutions for Sustainable Business in collaboration with CBI sector expert Siegfried Bank

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November 2015