



CBI  
*Ministry of Foreign Affairs*

# **CBI Product Factsheet:**

## **Tilapia in Europe**

## Introduction

Tilapia is one of the most farmed fish in the world. In 2013, over 44,800 tons of Tilapia were imported into the European Union, with 91% of these total imports comprising frozen Tilapia. France is the largest import market in Europe for frozen Tilapias, while Poland, Spain and Germany are the main EU import markets for frozen Tilapia fillets.

## Product description

Tilapia is a generic name of a group of fresh water species, with the most important groups classified under the scientific names of *Oreochromis*, *Sarotherodon*, and *Tilapia*. The HS codes referred to in this product fact sheet are given in table 1. Tilapia fillets belong to the broader product group of fish fillets (HS 0304). Since 2012, whole fresh/chilled Tilapia (HS 0302) and whole frozen Tilapia (HS 0303) have also been reported as separate HS codes. In Europe, Tilapia competes with various other white-fish species, ranging from Pangasius, Nile perch, and hake in southern Europe, to cod, haddock, and Alaska pollack in northern Europe.

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

030271	Fresh/chilled Tilapia
030323	Frozen Tilapias
030431	Fresh/chilled fillets Tilapia
030461	Frozen fillets Tilapia

## Product specification

This section provides you with basic information about specifications for fishery and aquaculture products in the EU. 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 also is relevant to you. Below, you can find more specific information about the labelling, packaging, and processing of Tilapia for the European market.

### Labelling

The contents of labelling must be provided in the language of the country to which 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. Member States publish a list of the commercial and scientific names accepted in its territory for this purpose;
- Production method: In the case of Tilapia, it must be stated that it is a cultured product;
- Origin: In the case of Tilapia, there must be a reference to the country in which it is produced;
- Presentation: It must be stated how the product is processed (for frozen whole fish or fillet products; for fresh products gutted, with or without head, filleted, thawed, other);
- Net weight: The net weight must be stated 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 batch number;
- Nutrition: Ingredients and nutrition must be stated;

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. It is therefore crucial for you to conduct discussions with your customers regarding their preferred packaging requirements. Some general characteristics are:

- Frozen Tilapia fillets are mostly imported in polybags or bulk. Bulk-packed Tilapia is usually for B2B companies, while polybags are distributed directly to customers. In the retail trade, frozen Tilapia fillets are usually sold in bags of 250/500 or 1000 grams;
- In retail, fresh or defrosted Tilapia is sometimes sold over the counter, but is mostly packed in a tray and plastic filter for self-service;

- Wholesale packing: Frozen Pangasius is mostly delivered in 10 x 1 kg bags packed in master cartons. Smaller bags are also sometimes requested for smaller size fillets.

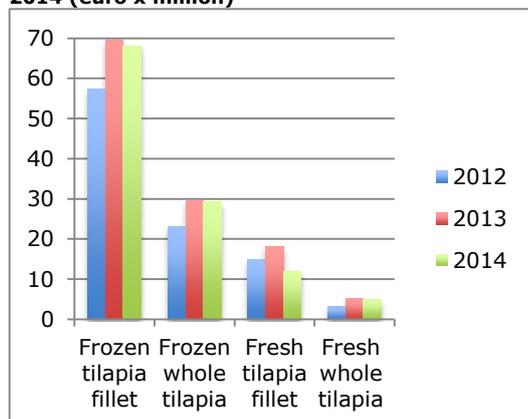
### Processing and colour:

- Colour: White fish; red/brown bloodline (size depends on skinning (shallow or deep skinned));
- Preferred processing: Mostly natural fillets (skinless, boneless, belly fat off, red meat off, well-trimmed), but sometimes also breaded fillets;
- Glazing: Usually 10-15%.

## What is the demand for Tilapia in Europe?

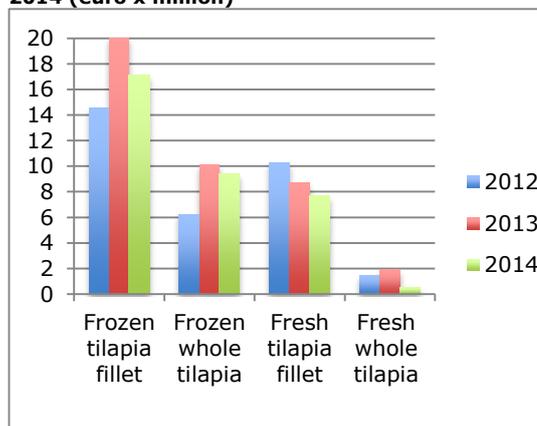
General information and figures about production and trade developments in Europe are provided in [CBI Trade Statistics](#). This section provides you with more detailed statistics of Tilapia trade and consumption in Europe.

**Figure 2: EU import value of Tilapia for 2012-2014 (euro x million)**



Source: Trademap

**Figure 3: EU export value of Tilapia for 2012-2014 (euro x million)**



Source: Trademap

## Imports

The EU imports of the other white fish from Asia - Pangasius - are far greater than for Tilapia, mainly due to lower import prices for Pangasius. The average import price difference between frozen Tilapia fillets (€3.20/kg) and Pangasius fillets (€1.82/kg) was more than €1/kg in 2014. However Tilapia is gaining grounds. The EU import value for frozen Pangasius fillets in 2011 was almost 9 times higher at €410 million. In 2014, this import value was only four times higher at €275 million.

The four biggest EU importers of frozen Tilapia fillets are Spain (6,000 tons), Poland (4,000 tons), the Netherlands (2,600 tons) and Germany (2,300 tons), accounting for more than 65% (€46 million) of the total value. The biggest importers of frozen whole Tilapia are France (4,400 tons), the Netherlands (3,400 tons), the UK (3,100 tons) and Belgium (2,700 tons), accounting for more than 75% (€23 million) of the total frozen whole Tilapia value for Europe in 2014.

The three most important Tilapia suppliers to Europe in 2014 were China (€33 million), Indonesia (€11 million) and Vietnam (€10 million). However, EU buyers tend to purchase more Tilapia from sources other than China on account of the quality image. Tilapia from Indonesia, Malaysia, and Thailand has a better image. Although countries in Latin America (especially Mexico and Costa Rica) also produce and export Tilapia, their main destination markets are the USA, Canada and Colombia.

In 2011 and 2012 Chinese Tilapia exports suffered due to poor weather conditions in 2011, causing high fish mortality rates. Chinese exports regained growth in 2013, resulting in strong growth of EU imports of frozen Tilapia fillets in 2013 (+24%). The EU market found a balance in 2014, with a small decrease in imports in that year (-2%).

**Tips:**

- If you want to access the European market, 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 with potential buyers from European countries.
- [Here](#) you can find recent market reports for Tilapia that highlights the latest developments.

**Exports**

Exports in Europe of Tilapia are virtually all re-exports of Tilapia originally imported from China, Indonesia and Vietnam. Several countries re-export Tilapia to other countries in Europe.

The export value of frozen Tilapia fillets rose by almost 40% in 2013 year by year, and declined by almost 20% in 2014 compared with 2013. Export volumes rose by 27% in 2013 and dropped slightly in 2014 (-3.5%). The main reason for this increase was the increased popularity of Tilapia in Europe, while there is no clear reason for the drop in 2014.

In 2014, the Netherlands and Belgium were the largest re-exporters of frozen Tilapia fillets (€5.7 million and €3.1 million respectively). The Netherlands re-exported mainly to Germany and Austria, while the most important export markets for Belgium were the Netherlands and France.

The Netherlands (€3.3 million) and the UK (€1.5 million) were the largest re-exporters of fresh Tilapia fillets in 2014. The Netherlands re-exported mainly to Italy, Germany and Romania, whereas the UK re-exported mainly to Switzerland.

**Consumption**

Tilapia has triumphed less in Europe than expected. There are two important reasons for this. Firstly, Tilapia is significantly more expensive than Pangasius. The second reason is the bad fish reputation due to poor Tilapia quality in the market years ago. In the USA, the quantity of imported frozen Tilapia fillets in 2014 was almost eight times higher (165,000 tons) than in Europe (Trademap).

Consumption of Tilapia is expected to show only slight increases in the years to come, because it will continue to struggle with other white fish species, like Pangasius and Cod. At the same time, imports of whole Tilapia are expected to remain stable because it will stay a niche market (preferred by ethnic minorities).

Whole Tilapia is mainly consumed by African ethnic minorities as these consumers prefer to purchase whole fish. Whole Tilapia is also imported frozen.

The demand for sustainable seafood is rising and the consumption of Tilapia certified by ASC and GlobalG.A.P. is growing.

**Tips:**

- In several European countries such as the Netherlands, Germany, and the UK, there are important niche markets for ethnic food products such as Chinese, Indian or North African food products. These markets have potential for farmed tropical (mainly: whole) fish products such as Tilapia.
- If you want to sell Tilapia to the European market, you have to be able to be price competitive. It may also help to present your product based on quality aspects in order to differentiate it from Chinese Tilapia, which is criticized by many insiders because of the quality.

**What trends offer opportunities on the European market for Tilapia?**

[CBI Trends for frozen white fish](#) provides you with general trends in the European frozen white fish market. This section provides more details about specific trends in the Tilapia and broader European Union seafood market.

**Continuing importance of ASC certification**

ASC certification has become the main sustainability certification scheme for Tilapia. Currently 24 Tilapia producers, including the major companies, are ASC certified. In countries such as the Netherlands and Germany, where ASC has been introduced, the certification scheme has already become a buyer requirement for large retail and food service companies. Although sustainability certification in general is more important in Northern Europe, also some retailers in Southern Europe see ASC certification as an opportunity to promote good practices and to improve the image of the product. If you want to gain or maintain access to large retailers and food service companies in Northern Europe, supplying ASC has

become a necessity. According to ASC, more ASC-certified farms are needed to meet the demand for ASC-certified Tilapia. It might be interesting to read the ASC pre-audit checklist for Tilapia to assess the potential of this certificate for your company.

### **Organic production of Tilapia**

Apart from the need for ASC certification of Tilapia in the northern and western parts of the European market, organically produced Tilapia has also been available since 2012. As there is a significant market niche for organic products in Europe, it can be interesting for you to investigate the market potential of organic Tilapia in Europe. Consumers are more willing to pay a price premium for organic products than for sustainable products.

#### **Tips:**

- The [ASC website](#) provides useful information about the certification process of Tilapia and possibilities to obtain support.
- You can find the ASC pre-audit checklist on the [ASC-website](#).
- You can contact ASC or Naturland to learn more about [sustainability](#) and [organic](#) (under 'main office' select aquaculture).

### **Value-added for Tilapia**

Although most of the Tilapia in Europe is consumed in the form of frozen fillet, there is a trend towards more ready-to-eat products, which means increasing demand for e.g. prepared, pre-cooked or marinated tilapia. This growing trend towards convenience food is due to consumers' busy lifestyles and time pressure. Consumers prefer meals that are easy to prepare and easy to cook.

#### **Tip:**

- Discuss with your clients the potential of value-added products on the European market.

### **Healthy food**

Fish is still promoted as a healthy food product. Information about claims related to health (like Omega-3-fatty acids) can benefit the sales of fish products in Europe. Also, be sure that your products are free of residue antibiotics and mud taste.

#### **Tips:**

- The fairs in Brussels and Vigo provide you with relevant information about trends in the seafood market and facilitate interesting contacts with potential buyers.
- Make a plan with your buyer to find suitable target markets to sell your Tilapia to Europe.
- Try to distinguish yourself by offering simple and value-added Tilapia. Think of marinated Tilapia, smoked Tilapia or Tilapia skewers.

### **Competition with Pangasius and other white fish**

Pangasius is the main competitor of Tilapia in Europe. The EU market for white fish traditionally has a strong focus on Pangasius and Alaska pollack. Competition is mainly based on price.

### **Tilapia remains promotional offer in retail**

In EU retail chains, Tilapia is often used for promotional offers. Purchasing managers do not see the potential to reposition Tilapia (even when it is ASC-certified) as a higher-value product. Additionally, the strong competition with Alaska pollack and Pangasius, which is mostly sold at a lower price than Tilapia, does not provide opportunities for positioning Tilapia as a higher value product.

#### **Tips:**

- Gather data about market developments relating to the white-fish market. [Globefish](#) provides quarterly information on developments in the global seafood market.
- Besides consistent quality, a competitive price level is important for retailers when they source promotional offers. Make sure you know your competitors' prices in order to offer Tilapia at a competitive price.

## What requirements should tilapia 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 tilapia.

## What legal requirements must my product comply with?

These are the legal requirements for the import of tilapia 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.

## What additional requirements do buyers often have?

For tilapia, 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.

### Tips:

- The International Trade Center (ITC) offers fact sheets on the several certification schemes, e.g. on [IFS](#) or [BRC](#).
- Convince your buyer that you deliver high-quality products. For buyers, it is important that laboratory results are available for your fish (microbiological but also about potential contamination by antibiotics). These should come not only from your own laboratory, but also from an ISO 17025 accredited lab.

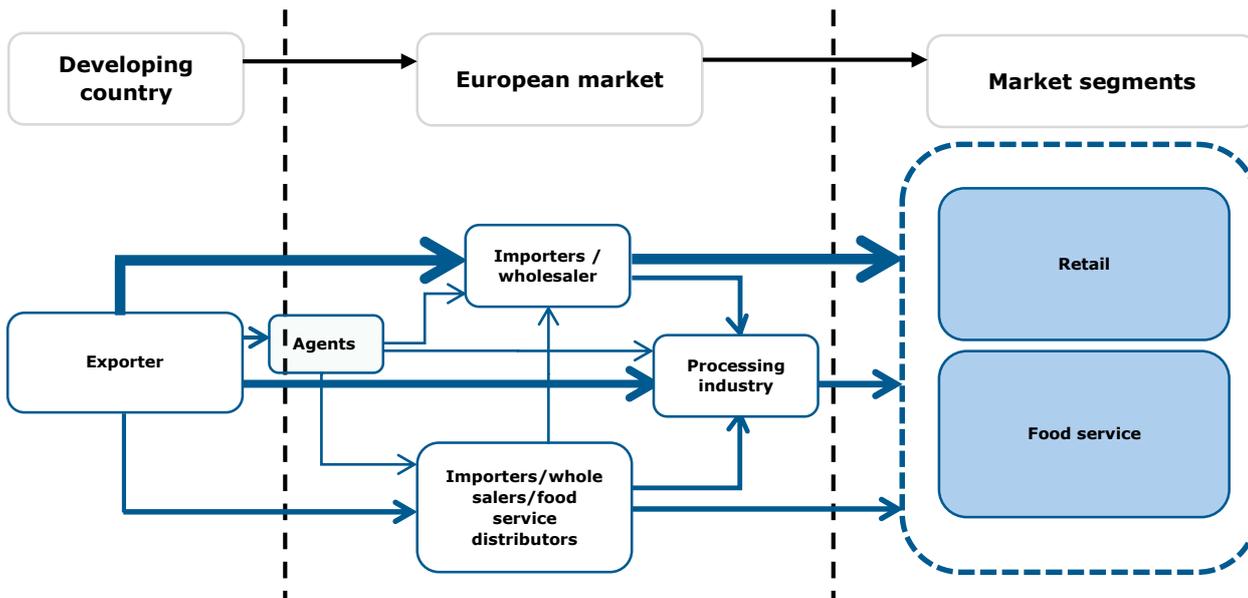
## What are the requirements for niche markets?

Despite the fact that in the EU sustainability or organic certification is, in general, still seen as a niche market requirement, the introduction and growth of ASC Tilapia is considered as the main development in the past decade. Sustainability certification has become a buyer requirement for several large retail and food service companies in some European countries (e.g. Germany). ASC is the most important certification scheme for aquaculture and has a separate standard for Tilapia, which was finalised in 2011.

## What do the trade channels and interesting market segments look like in Europe for Tilapia?

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 detailed information about the various marketing channels through which Tilapia is marketed in Europe.

**Figure 4: Market channels and segments for Tilapia in Europe**



Large Tilapia importers have their own quality agents at origin to check the quality of the Tilapia 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 foodservice companies are starting to buy directly from the source to an increasing extent. If you want to supply retailers or foodservice companies directly, supply volumes and consistency of supply are crucial.

Freshly imported fish enters the country either by ship or by air freight. Tilapia fillets are mainly transported by ship. The important ports in Europe are Rotterdam (the Netherlands), Antwerp (Belgium), Hamburg or Bremen (Germany), and Marseille (France).

EU importers and wholesalers of Tilapia also re-export Tilapia between European countries. The main re-exporters (the Netherlands and UK) sell frozen Tilapia fillets in the form of defrosted Tilapia fillets. The Netherlands for example, re-exported 2,570 tons in 2013, mainly to France (450 tons), Romania (396 tons), and Germany (313 tons).

Retail groups in Europe often have different formulas, ranging from premium supermarkets to discount stores. In most cases each formula has its own purchasing and distribution system. Large retail groups source from a small number of large import and wholesale companies. However, some retail groups also source directly from exporters from Developing Countries.

Tilapia is also sold in the food service sector. However, this is mostly limited to low-budget restaurants.

**Tips:**

- It is an advantage to be transparent. Give your buyer the possibility to monitor the total production process.
- Retail and foodservice markets in Europe have different characteristics and different needs. Discuss with your buyers what the specific needs and requirements of their clients are and how to meet these needs and requirements.
- If you are aiming to supply your products to the European retail segment, find out which large import and wholesale companies trade with European retailers. In Germany, [Deutsche See](#) is one of the main companies that supply to the retail segment. In the Netherlands, [Queens](#) is the main retail supplier.

**Useful sources**

- EU Export Helpdesk - [http://exporthelp.europa.eu/thdapp/index\\_en.html](http://exporthelp.europa.eu/thdapp/index_en.html)
- Europe environmental agency <http://www.eea.europa.eu/>
- Aquaculture Stewardship Council <http://www.asc-aqua.org>
- European Seafood Exposition <http://www.euroseafood.com>



**CBI Market Intelligence**

P.O. Box 93144  
2509 AC The Hague  
The Netherlands

[www.cbi.eu/market-information](http://www.cbi.eu/market-information)

[marketintel@cbi.eu](mailto:marketintel@cbi.eu)

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

Disclaimer CBI market information tools: <http://www.cbi.eu/disclaimer>

November 2015