



CBI Product Fact Sheet: Frozen cultured black tiger shrimp in the EU

'Practical market insights for your product'

The giant tiger shrimp, also called black tiger (*Panaeus monodon*) is one of the most popular cultured shrimp species in the world. In 2012, worldwide aquaculture realised over 850,000 tonnes of black tiger shrimps (almost all produced in Asia). Most of these cultured shrimps are exported to the European Union (EU). This product fact sheet provides you with information on product specifications, statistics, trends, market channels and segments, and competitiveness of the giant tiger prawn in the EU seafood market.

Product definition

Figure 1: giant tiger shrimp (Monodon)



Black tiger shrimps (*Penaeus monodon*) are part of the Penaeidae family. Other species in this family are *P. vannamei* (whiteleg shrimp), *P. setiferus* (Atlantic white shrimps) and *P. indicus* (Indian prawn). Female shrimps can reach sizes of 33 centimetres, but are typically around 25-30 centimetres. Male black tiger shrimps are smaller and around 20-25 centimetres. The following HS codes for shrimp are used in this product fact sheet:

Table 1: HS codes containing black tiger shrimps

030613	Frozen shrimps and prawns
030617	Frozen shrimps and prawns ¹

¹ Contains all frozen, peeled and unpeeled, raw and steamed black tiger shrimps and peeled boiled black tiger shrimps.

160520	Shrimps and prawns
160521	Shrimps and prawns, not in airtight containers
160529	Shrimps and prawns, in airtight containers ²

Product specification

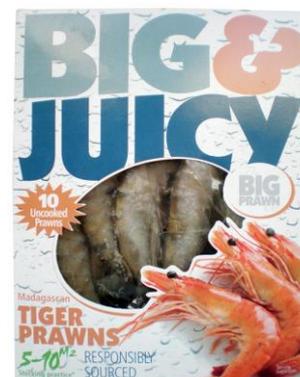
This section provides you with basic information about product specifications and import requirements in the EU, which is based on EU legislation. Important legislation is the recently renewed Common Organisation of the Market, which contains the rules of the organisation of the market for fishery and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

- Name of the product: The [commercial and scientific](#) name of the species. For this purpose, Member States publish a list of the commercial and scientific names accepted in their territory;
- Production method: In the case of the black tiger shrimps, it must be mentioned that it is a cultured product;
- Origin: In the case of the black tiger shrimps, a reference to the country where it is produced is required;
- Presentation: It must be mentioned how the product is processed (whole (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.

Frozen Black Tiger Shrimps HOSO (<i>Panaeus monodon</i>)	
NET WEIGHT	:
SIZE	:
EU APPROVAL NO.	:
COUNTRY OF ORIGIN	: BANGLADESH
PRODUCTION	: FARMED
PRODUCTION DATE	: 12 - 04 - 2013
EXPIRY DATE	: 11 - 04 - 2015
LOT NO.	: 185
IMPORTER	:
KEEP FROZEN AT -18°C OR BELOW	
DO NOT REFREEZE AFTER THAWING	



² Frozen cooked unpeeled shrimps and value added shrimps (like skewers, spies and marinated shrimps).

Packaging:

Packaging requirements 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:

- Frozen black tiger shrimps are mostly imported in cartons with a certain amount of shrimp in it, depending on the size or the weight (for example 20/30, 30/40, 40/50, etcetera, pcs/kg);
- For B2B, frozen black tiger shrimps are often imported as 5 to 25 kg bulk, and also as 1-5 kg block frozen;
- Most popular shrimp size in the EU is 30/40 pieces per kilogram.



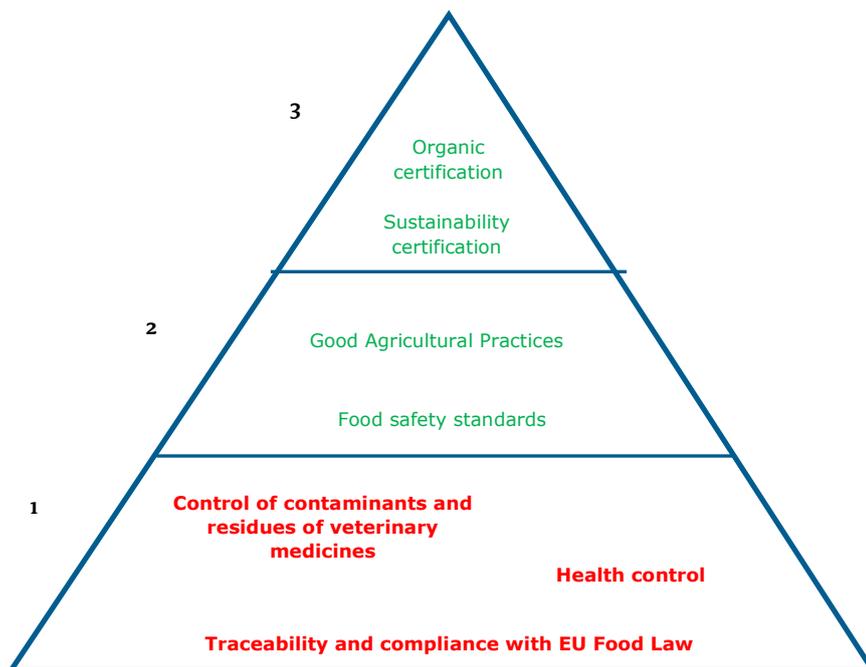
Processing and colour:

- Colour:
 - Raw: Grey to black stripes with a little green touch. Associated stripes on the peeled meat.
 - Cooked: Bright red shell and white meat.
- Preferred processing varies 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, raw HOSO shrimps are preferred for the cooking industry. In northern Europe, retail PUD shrimps are popular.
- In the EU, the black tiger shrimps are measured by pieces per kilogram (pc/kg). For Europe, 30-40 pc/kg are preferred by the mainstream. However, certain niche markets prefer larger sized 20-30 pc/kg.
- Glazing: usually 0-20%.

Buyer requirements

Buyer requirements can be divided into: (1) musts, requirements you must meet in order to enter the market, such as legal requirements; (2) common 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) niche market 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.

Figure 2: Buyer requirements for giant tiger shrimp (Monodon) in the EU



Requirements you must meet (1)

These are the legal requirements for the import of black tiger shrimp into the EU. More information about these legal requirements can be found on the [EU Export Helpdesk](#).

Compliance with EU Food Law and traceability:

- The EU Food Law is the basis for legislation with respect to food safety in the EU. The EU Food Law is supplemented by other EU legislation regarding hygiene and the use of forbidden substances such as hormones and pesticides;
- Traceability is defined by the EU as the ability to trace and follow black tiger shrimp and other seafood products that will be used for consumption, through all stages of production, processing, and distribution;
- EU companies that deal with black tiger shrimp and other seafood products have to

Considerations for action

- On the website of the European Commission, you can find more information about the [EU Food Law](#).
- This [fact sheet](#) gives you more information about traceability.

provide information about the supplier and the buyer of the black tiger shrimp on a batch level;

- Companies in the EU are required to have systems in place that allow for information regarding traceability, in order to be able to identify where and how black tiger shrimp were produced and processed in the third country. Therefore, traceability is also important for exporters from developing countries.

Health control:

Black tiger shrimp that are imported into the EU must comply with the following general health requirements:

- Country health approval: The European Commission's Directorate General for Health and Consumers (DG SANCO) applies a procedure to [assess](#) if your country complies with EU Public and Animal Health conditions. Part of this procedure is an on-site review by the Food and Veterinary Office (FVO);
- Approved establishments: Black tiger shrimp can only be imported into the EU, if they have been processed and prepared in establishments that are on a list approved by DG SANCO. The competent authority in your country is responsible for the approval of your company. If you are approved, you will receive an EU approval number, which has to be mentioned on the label;
- Health certificates: Imports of black tiger shrimp into the EU must be accompanied by a health certificate signed by the competent authority of the exporting third country. This certificate states that your products are suitable to be exported to the EU. In practice, various models of health certificates are used, which can depend on the category of products, the species concerned or special health conditions;
- Hygiene and health control: Upon arrival in the EU, black tiger shrimp products and the accompanying certificates must be inspected by veterinarian officials. The result of the inspection is reflected in the [Common Veterinary Entry Document](#) (CVED).

Control of contaminants and residues of veterinary medicines:

Imports of black tiger shrimp into the EU should comply with EU legislation designed to ensure that the product is safe to eat and does not contain contaminants, chemical substances, and residues at levels that could threaten human health. For black tiger shrimp, it is about which chemicals may be used during the production,

- Here, you can find more information about the activities of the [Food and Veterinarian Office](#) of the EU.
- See the list of [EU approved fishery establishments](#) for your country to check which of your competitors have access to the EU.
- Discuss with your buyers which model of health certificate is needed.
- Be sure that you use the newest [Health certificate](#) that is required from March 2013.
- On the export desk of the EU, you can find more information [about control of residues of veterinary medicines](#).

and which residues for Black Tiger shrimp are allowed in the EU. If you want to export aquaculture products to the EU, you have to be aware of the following issues:

- Black tiger shrimp containing contaminants at a level that is unacceptable for public health will be rejected;
- The level of contaminants must be kept as low as can reasonably be achieved;
- For several contaminants, maximum levels are set to protect public health;
- Your country is required to submit an annual residue monitoring plan to the European Commission;
- Samples of consignments may be tested for residues by [national reference laboratories](#) in the Member States;
- The maximum concentration of a residue of a pharmacologically active substance that may be permitted in an aquaculture product is the Maximum Residue Limit (MRL). MRLs are listed in [Commission Regulation \(EU\) No 37/2010 \(OJ L-15 20/01/2010\)](#). If your product surpasses these limits in this regulation, it will be rejected.

Common requirements (2)

For black tiger shrimp, common requirements are mainly requirements with respect to food safety. More information about which food safety standards are relevant can be found on the [ITC standards map](#). GlobalG.A.P., a standard that promotes Good Agricultural Practices, is another common requirement in addition to food safety standards, if you want to export black tiger shrimp to the EU.

Food safety Standards

Third party food safety certification schemes, such as the British Retail Consortium (BRC), are very important in the EU, especially in northern Europe. It is especially a buyer requirement if you supply to (large) international retailers.

British Retail Consortium (BRC)



Some retailers and catering companies require BRC certification. The BRC food standard was developed by British retailers to ensure an adequate level of food safety and food quality, and to assist companies in their 'due diligence' defence.



International Featured Standards (IFS)

Other retailers and catering companies require IFS certification (often referred

Considerations for action

- See the [BRC database and website](#) to check which of your competitors are already BRC-certified and to read more about the BRC standard.

- See the [IFS website](#) for more information if you have identified

to as International Food Standards). This standard is created by German and French retailers to also ensure an adequate level of food safety and food quality, and related services.

GlobalG.A.P.



Some retailers and food service companies require you to supply black tiger shrimps sourced from farms that comply with food safety and sustainability demands. GlobalG.A.P. is a B2B certification scheme. In 2013, GlobalG.A.P. and the Aquaculture Stewardship Council started to work together in order to harmonise their requirements. A step-by-step approach makes it possible to first become GlobalG.A.P.-certified and then work towards ASC-certification.

- See the [GlobalG.A.P. website](#) if you have identified buyers that are interested to source GlobalG.A.P. black tiger shrimps or if you are interested in the GlobalG.A.P. standard.

Niche market requirements (3)

In the EU, sustainability certification and organic certification of black tiger shrimp are still seen as niche market requirements, although sustainability certification has nearly become a buyer requirement for large retail and catering companies in the EU.

Sustainability standards

The demand for sustainable shrimp is growing in the EU. Especially in northern Europe, sustainability is becoming increasingly important, and it is already a buyer requirement for large retail and catering companies. Smaller companies do not always demand sustainability certificates. Sustainability certification is less important in southern Europe.

Aquaculture Stewardship Council (ASC)



ASC is an emerging B2C certification scheme for aquaculture products and is expected to become a buyer requirement in EU member states like the Netherlands and Germany.

Considerations for action

- If you are interested to sell ASC black tiger, discuss with your buyer whether a premium can be paid or calculate if you can produce ASC black tiger cost-neutral. For more information about ASC standards and certification, check the [ASC Website](#) and the [ASC accelerator](#) support program.

Organic certification

In some EU countries such as Germany and Switzerland, organic products are becoming an important niche market. Being able to produce black tiger shrimp organically and achieve organic certification can boost your business opportunities in the EU market.



Naturland

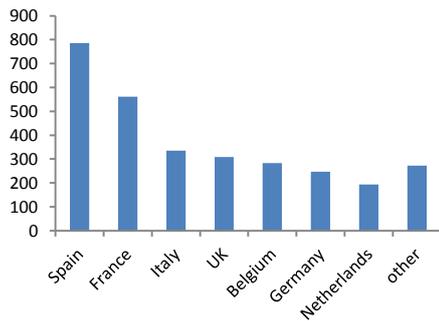
Naturland is an association for organic agriculture. Naturland was created in Germany in 1982. Since the mid-nineties, Naturland has been very successful in conducting organic aquaculture projects.

- Go to the website of Naturland if you want to know how you can sell your black tiger shrimps with the organic Naturland logo.

Trade and macro-economic statistics

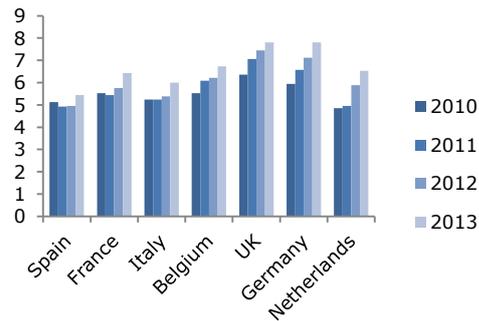
General information concerning trade figures in the EU is provided in CBI Tradewatch. This section provides you with more detailed statistics of shrimp trade and consumption in the EU.

Figure 3: EU Import value of frozen shrimps and prawns (HS 030617) for 2013 (euro x million)



Data source: Comtrade

Figure 4: EU Import price per kg frozen shrimps and prawns (HS 030617) for 2010-2013 (euro/kg)



Data source: Comtrade

Analysis and interpretation

Imports

- In 2013, the total value of imports of frozen shrimps and prawns³ (without cold-water shrimps and prawns) to the EU amounted to €3.0 billion (474 thousand tons). This represents 34% of global import value (36% import volume) for this group. Compared with 2012, the total import value rose by 8% in 2013 while import quantities fell by 2%. The global supply crisis caused this price increase (not only in Europe but worldwide).
- The above-mentioned shrimps and prawns imported to Spain, France, Italy, UK, Belgium, Germany, and the Netherlands account for over 90% (€2,710 million) of the total frozen shrimp and prawn import value in Europe for 2013.

Considerations for action

- If you want to access the European market, consider participating in the Seafood Expo Global in Brussels or Seafood Barcelona, 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.
- The above-mentioned fairs in Brussels and Barcelona also provide you with relevant information about trends in the seafood market as well as interesting contacts with potential

³ Smoked frozen shrimps or prawns, shrimps of species *Parapenaeus longirostris*, genus *Penaeus*, family *Pandalidae* without genus *Pandalus*, genus *Crangon* without species *Crangoncrangon*

- The EU is, along with Japan, one of the most important markets for black tiger shrimp. While Japan mainly sources the largest size black tiger shrimps, the EU also imports smaller sizes. As a result of the price-oriented behaviour of European consumers, the contribution of black tiger shrimp to total shrimp imports is decreasing.
- The most important export countries for black tigers are Bangladesh, Vietnam, India, and Indonesia. While black tiger accounts for approximately 80% of total shrimp exports in Bangladesh, the contribution of black tiger shrimp exports is decreasing in the other countries, varying between 20% and 50%.
- Northern European countries (Netherlands, Germany, and Belgium) mainly import their shrimps from countries that produce both black tiger and vannamei shrimps. Spain, France, and Italy mainly import vannamei shrimps.
- Monodon shrimps account for nearly 100% of the Bangladeshi shrimp production. For the Netherlands, Germany, and Belgium, shrimp imports from Bangladesh amount to 25%, 25%, and 39% of total shrimp imports respectively.
- Figure 3 shows the average shrimp price for the 7 main EU countries importing shrimps. The difference in the average shrimp price between southern Europe (Spain, Italy, and France) and northern Europe (Belgium, UK, Germany, and the Netherlands) in 2013 was €1.30. Countries such as Spain, Italy, and France import cheaper raw material, mostly HOSO, as a source for the domestic shrimp cookeries. Northern Europe, on the other hand, imports more cooked or peeled shrimps. The average import price in Europe is €6.30 (€5.74 in 2012).
- In 2013, prices of black tiger shrimp and vannamei shrimp have increased rapidly and are historically high. The first reason is the outbreak of the Early Mortality Syndrome in many vannamei-producing countries, resulting in a global supply shortage and competition for the raw material. The second reason is that Chinese production is facing problems, resulting in China purchasing more shrimp than normal for domestic consumption. This is further increasing competition for raw material. As a result, prices for black tiger shrimp are high and you will not have any problem selling your product. In early 2014, the prices started to stabilize. This was due to several strategies to reduce EMS crop failures and due to increased production in India and Indonesia. However, with continuing high demand from China, it is not expected that prices will decline to the pre-EMS levels.
- In November 2013, the average prices in Europe for Bangladeshi black tiger shrimps were \$11.20 for 8-12 pc/kg, \$7.35 for 16-20 pc/kg, and \$5.50 for 31-40 pc/kg.
- Thailand continues to be the main supplier of value-added frozen shrimp products. Europe imported 17,700 tons with an import value of €157 million (26,700 tons and €205 million in 2012) of frozen

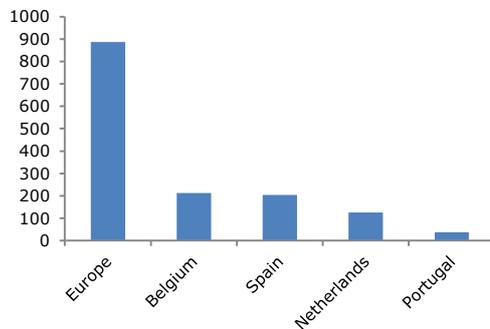
buyers.

- You can do more research on these exporting countries by visiting the websites of VASEP or MPEDA.

preserved and prepared shrimps from Thailand in 2013. This is over 50% of the total import value of prepared or preserved shrimps (as mentioned in table 1) from the main countries producing farmed black tiger shrimps and vannamei shrimps. The exports from Thailand to the EU decreased in 2013 as a result of EMS and forthcoming changes in Thailand's status in the EU GSP system. The share of Vietnam and Indonesia in the exports of prepared or preserved shrimps (as mentioned in table 1) is increasing. Indonesia, for example, increased its export value to the EU from €35.0 million to €52.5 million between 2009 and 2013.

- The main importers of prepared or preserved shrimps from Thailand are the UK (9,803 tons), Germany (4,873 tons), and the Netherlands (1,288 tons). These amounts are on the decrease, but are expected to grow again in 2014
- The import prices in the EU for Thai preserved and prepared frozen shrimps increased from €6.17/kg in 2010 to €8.87/kg in 2013. This may be a result of the supply shortage in Thailand and globally, which caused the price for raw material to increase.

Figure 5: EU re-export value of frozen shrimps and prawns (HS 030617) for 2013 (million euro)



Data source: Eurostat

Exports

- In 2013, Belgium was the largest re-exporter of frozen shrimps and prawns (around €212 thousand without cold-water shrimps and prawns). Globally imported shrimps enter Europe via the port of Antwerp, from where the product is distributed to surrounding EU markets. The most important export markets for Belgium are France (9,682 tons), the Netherlands (7,255 tons), Spain (4,612 tons), Germany (3,859 tons), and Italy (1,241 tons). Spain re-exported mainly to Italy (12,620 tons), Portugal (8,163 tons), and France (4,451 tons). The Netherlands re-exported mainly to Germany (6,052 tons), France (3,004 tons), and Belgium (2,775 tons). Portugal re-exported most of its shrimps to Spain (7,158 tons).

- For further research on price information, you can visit the websites of Globefish or the EU market observatory for fishery and aquaculture products.

- You can also have a look at national sector associations that provide a lot of information about active importers and the exporters. Visit e.g. the website of Dutch Fish.

- The price difference between import and re-export was highest for Spain. This can be attributed to the large catering industry in that country, where cheap raw shrimp materials are cooked and then re-exported to other EU countries.

Consumption

- Unfortunately, there is no precise information on consumption in Europe and apparent consumption is very difficult to calculate on account of exports often being reprocessed inside the EU and values and volumes changing. In general, however, shrimp represents only a small part of overall seafood consumption. The share in terms of volume is greater than the share in terms of value. In the current economic situation, it is anticipated that the share of shrimp will decrease because it is an expensive product.
- Countries such as Spain, Italy, and France import more raw material, mostly HOSO, as a source for domestic shrimp cookeries. Northern Europe, on the other hand, imports more cooked or peeled shrimps.
- As mentioned earlier, northern European countries import their shrimps from Asian countries, in particular, while southern European countries tend to source mainly from South American countries.
- In previous years, black tiger shrimps were more expensive than vannamei shrimps. Currently, prices are more equal because of the shortage of vannamei shrimp supply, which is pushing the prices of vannamei shrimps up to the same level as for black tiger. This is positive for black tiger shrimp in the short term because consumers may prefer to buy black tiger shrimp on account of its colour and taste. In the long term, prices of vannamei are expected to fall again and this may result in a drop in black tiger consumption.
- Although the main consumption in southern Europe comprises vannamei shrimp, there is also a niche market for large size black tiger shrimp. Consumers in southern Europe are very much quality-oriented and higher-income consumer groups prefer to purchase larger-sized shrimp, especially in the out-of-home sector. This niche is under pressure from the crisis, but importers emphasise that demand from this market segment is relatively stable.

- Information on re-exports is difficult to find. However, for further research you can best search the exporter databases of EU companies. Visit, for example, the importer/exporter database of Dutch Fish.

- To find information about consumer preferences for shrimp products, take a look at 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).

- If you want to do business with southern Europe, make sure your marketing staff speaks Spanish.

Market Trends

CBI Trend Mapping provides you with general trends in the European shrimp market. This section provides more details about specific trends in the shrimp and broader EU seafood market.

Analysis and interpretation

Social:

- **Consumer awareness:** European inhabitants want to know where their food comes from and how it is produced or caught. The shrimp-farming

Considerations for action

- Work on special activities in your country to support the communities and environment. Include these

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 enhance your potential in the EU.

- **Convenience food:** In the EU, the demand for convenience food is on the increase on account of time pressure. Consumers prefer meals that are easy to prepare and easy to cook.
- **Value added:** Although most of the shrimps in Europe are imported Head On Shell On (HOSO), there is a trend towards more ready-made products. Discuss with your clients the potential of value-added products on the European market in the form of marinated shrimps or skewers.

Economic:

- **Higher demand for low value products:** As a result of the economic crisis, the import value is expected to decrease in the future, with shrimp consumption remaining stable. The demand for cheaper shrimps, such as vannamei shrimps, will increase, while demand for black tiger shrimps will decrease. As long as the crisis persists, try to offer low-value shrimps.
- **Focus on larger sizes:** In the long term, black tiger shrimp will increasingly become a niche product. When vannamei production recovers and prices fall, it will be difficult for black tiger shrimp to compete with sizes that overlap with vannamei. Black tiger shrimp will become more of a niche market. It is expected that larger-sized black tiger shrimp, in particular, will be in demand in the out-of-home sector. Large-size black tiger shrimp will also continue to be a niche market in southern Europe.

Environmental:

- **Sustainable production becoming a requirement:** On the European market, the northern part is one of the most progressive and critical regions with regard to responsible and sustainable food production. Germany, the Netherlands, and Sweden were among the first countries in which the ASC certification scheme was introduced. ASC is currently working on the ASC shrimp standard. The implementation of this standard is expected towards the end of 2013. Within a few years, large companies in the retail and food service segment will only offer ASC aquaculture products. It is good to invest in this upcoming standard.
- **Organic black tiger shrimps:** In addition to the need for sustainable seafood on the (northern) European market, there is also a demand for organic seafood. It can be interesting for you to investigate the market potential of organic black tiger shrimps in the EU.

Political:

- **Changes in import tariffs within the Generalized System of Preferences (GSP):**

activities in your market strategy.

- Visit the ASC and GLOBALG.A.P. website to learn more about the important rules for sustainable farming.
- Make a plan with your buyer to find niche markets to sell your black tiger shrimps to the EU.
- In the short term, it is good to focus on cheaper shrimp products.
- For the long term, invest in a good marketing plan to sell your large black tiger shrimps into the EU.
- Gather data about market developments of giant tiger prawns and other shrimp species such as whiteleg shrimps. Globefish provides quarterly information about developments in the global seafood market.
- The ASC website provides useful information about the certification process of shrimps and possibilities to obtain support.
- Organic black tiger shrimps could be a potential niche product for your marketing plan.
- Try to find out if your country does or does not benefit from the GSP

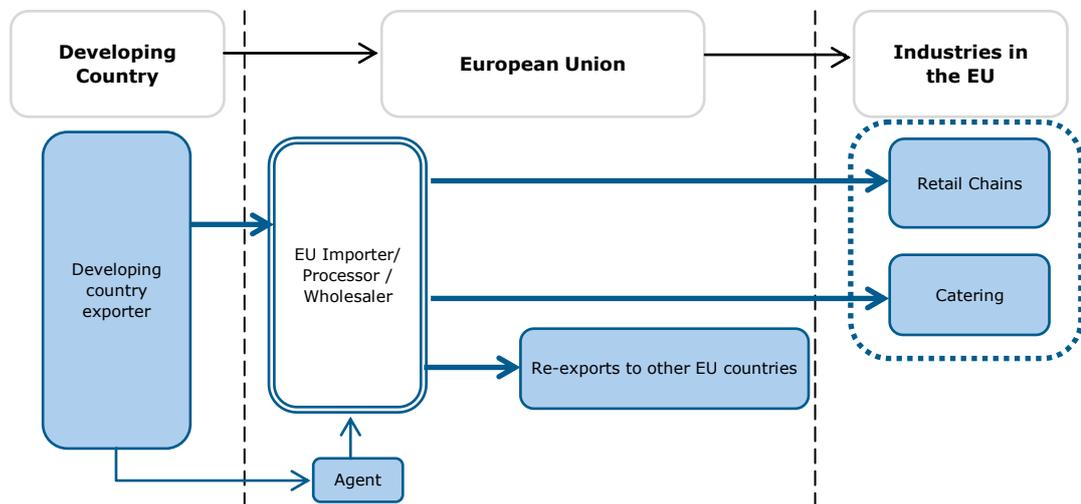
Current tariff preferences will be amended at the beginning of 2014. GSP will be focused on countries most in need. It is possible that your country will lose or receive this GSP preference.

amendments. For more information about GSP and future plans, check the EU website.

Market Channels and Segments

For more general information about market segments and channels, take a look at the Market Channel and Segment document on the European market for seafood available at the CBI market intelligence platform. This section provides detailed information about the various marketing channels through which black tiger shrimps are marketed in Europe.

Figure 6: Market channels and segments for Monodon shrimps in the EU



Analysis and interpretation

- Large black tiger 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. Importers will continue to visit your factory before they sign contracts but will make use of a local agent to assure quality and manage their risks.
- The general trend in Europe is to shorten the supply chain. Retailers and catering companies are increasingly starting to buy directly from the source. If you want to supply retailers or catering companies directly, supply volumes and consistency of supply are crucial. However, as black tiger shrimp is often sold in smaller volumes, most of the products are still imported by traditional import companies. Direct business with supermarkets is therefore only interesting if you are able

Considerations for action

- It is an advantage to be transparent about your operations, from sourcing to processing. Give your buyer the possibility to influence and monitor the overall production process. Co-production is becoming more common and may increase your business opportunities.

to bear the risks of doing business with supermarkets and if you are able to supply large volumes and can offer continuous supply.

- Imported fishery products enter the EU either by ship or by air freight. Frozen cultured tiger prawns are mainly transported by ship. Important ports in the EU 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 not positive for black tiger shrimp as the share of black tiger shrimp in the retail market is falling as a result of price-oriented consumers. Black tiger shrimp remains an important product in the out-of-home segment, where restaurants prefer to serve larger-size shrimp. In the out-of-home segment, buyers are still more quality-driven than price-driven.
 - European retail groups often have different chains, such as large supermarkets or discount stores, with a different purchasing and distribution system. Purchasing departments of retail groups like Aldi can also be differentiated by retail chain or per region. Large retail groups mostly do not import directly from exporters from developing countries, preferring to source from a small number of large import and wholesale companies.
- Try to invest in a product which is suitable for selling in supermarkets. Take a look at a product assortment of a supermarket through their websites.
 - If you are aiming to supply your products to the retail segment in the EU, find out which large import and wholesale companies trade with large retailers in the EU. Large companies that supply to the retail segment include Deutsche See in Germany, Galana N.V. in Belgium or Heiploeg and Klaas Puul in the Netherlands.

Useful sources

- EU Export Helpdesk
http://exporthelp.europa.eu/thdapp/index_en.html
- Europe Environmental Agency
<http://www.eea.europa.eu/>
- Aquaculture Stewardship Council
<http://www.asc-aqua.org>
- FAO website
<http://www.fao.org>
- European Seafood Exposition
<http://www.euroseafood.com>

This survey was compiled for CBI by LEI Wageningen UR
in collaboration with CBI sector expert Siegfried Bank

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