



CBI
Ministry of Foreign Affairs



Agriculture, Fishery and Forestry

Fishery products

CBI Market Intelligence | 2011

European Fish and Seafood Market

Lima, September

Introduced by

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Objectives of CBI Data



To support Exports to the EU by reducing complexity of the EU market and Market Access requirement by **Information**.

This is Europe:



Nowadays:
EU = 27 different
Countries







What Information is



provided?

Information on

**And on how to
access and use this
information**

-  EU buyer requirements
-  Fact sheets
-  Market Intelligence
-  Marketing Intelligence
-  Introduction to CBI's Research Action Plan
-  Reader's guide - How to use this CD-ROM

- **Market Intelligence:** *market highlights on EU level for subsectors, describing promising export markets, trends and segments and prices and price developments;*
- **Marketing Intelligence:** *doing business intelligence on EU level ..., which helps you with country selection, competitor analysis, product strategy, .., finding buyers, and promotion strategy;*
- **Fact sheets:** *specific market intelligence on country level for subsectors or product groups;*
- **EU buyer requirements:** *overview of legal and non-legal market access requirements in the EU.*

how to access and use
important, because it
information:



this information is
is a lot of

**Only on market
intelligence
there are 17
chapters with
up to 9 pages**

**So it is
important to
have a question
or to know what
You are looking
for – or look for**
→ *further
orientation*

- An introduction to CBIs market information for fishery products
- Buyer requirements for frozen crustaceans and cephalopods
- Buyer requirements for frozen fish and fish fillets
- Buyer requirements for prepared and preserved fish
- List of sources for fish and fishery products
- Prices and price developments frozen crustaceans and cephalopods
- Prices and price developments frozen fish and fish fillets
- Prices and price developments prepared and preserved fish
- Promising EU export markets frozen crustaceans and cephalopods
- Promising EU export markets frozen fish and fish fillets
- Promising EU export markets prepared and preserved fish
- Trade structure and channels for frozen cephalopods and crustaceans
- Trade structure and channels for frozen fish and fish fillets

further orientation

you will find on the CBI web side:

www.cbi.eu/marketinfo e.g.



through the following available exports manuals:

- **Exporting to Europe – an introduction to the European market;**
- **Export planner – how to plan your export process;**
- **Your guide to market research – practical and low cost research methods;**
- **Your image builder – how to present yourself on the EU market;**
- **Your expo coach – selection, preparation and participation in trade fairs;**
- **Digging for gold on the Internet – Internet as a source for market information;**
- **Website promotion – how to promote your website in the EU.**

Next Step:



Now we presume you have your basic information and you checked your company structure and decided you want to export and you have decided that the EU is an optional Export Market.

Remaining 2 principal Questions:

1. What product? !!! That will be one of the products you have:
1 – 3?!
2. What market in Europe? ????? More difficult! 27 Countries and more than 1 criteria as we will explain to you:

Let us call up and check **Market intelligence** on basis of your decided product – *fish and fish fillets*:



-  An introduction to CBIs market information for fishery products
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-  Promising EU export markets frozen crustaceans and cephalopods
-  Promising EU export markets frozen fish and fish fillets
-  Promising EU export markets prepared and preserved fish
-  Trade structure and channels for frozen cephalopods and crustaceans
-  Trade structure and channels for frozen fish and fish fillets

Klick on 

Promising EU export markets: frozen fish and fish fillets

This module explores the developments in European markets and helps to identify market opportunities for frozen fish and fish fillets in particular tuna, **hake**, pollack, freshwater species, salmon,

The most interesting markets in the EU are the established Southern and Western European countries due to their size and large trading capacity.

Promising EU export fish fillets



markets: frozen fish and

- **Opportunities and threats in the EU market**

+The EU market is one the largest markets in the ...

+ EU production has been declining in recent ...

+ Frozen FFF are becoming more in demand ...convenience

- **Demand and developments in the EU**

Table 1: Comparison of demand, production, and import from DC, by country, in 1,000 tonnes

	Total demand		Total production		Total frozen imports		Frozen imports from DC		Share of DC in total imports	Attractivity index
	volume 2008	growth '04-'08	volume 2008	growth '04-'08	volume 2009	growth '04-'09	volume 2009	growth '04-'09		
EU 27	3,753	-1.1%	2,348	-4.9%	1,164	2.9%	854	8.0%	73%	n.a.
Spain	599	-2.1%	451	-2.9%	275	2.3%	245	3.1%	89%	++
Germany	362	-0.2%	131	-2.6%	247	3.7%	170	11%	69%	+++
France	379	-4.1%	254	-8.0%	89	3.9%	70	9.8%	79%	++
Poland	187	13%	52	-4.5%	81	12%	69	17%	85%	+++
United Kingdom	560	0.5%	365	-3.1%	149	1.6%	68	11%	45%	+++
Italy	209	-2.7%	91	-4.8%	59	6.9%	57	8.7%	97%	++
The Netherlands	280	-2.5%	223	-8.4%	80	3.9%	51	10%	64%	++
Belgium	37	0.8%	2.6	-8.8%	29	0.9%	22	3.0%	76%	++
Portugal	244	-0.5%	110	0.7%	23	-16%	20	3.6%	87%	+
Denmark	267	-6.5%	192	-11%	38	-1.5%	14	19%	38%	+
Romania	14	27%	0.6	-13%	14	31%	13	43%	94%	++



further Information on EU market:

Do I need
further
General
Input ? or
Is it just

Box 1: Facts of the EU markets

Some important facts about the EU market:

- It is a highly diversified market. In Northern Europe, most of the consumed species are cold-water species such as cod, herring and pollack. In these countries, ready meals are more popular than in Southern European countries and, in general, processed fishery products have a higher market share. In the Mediterranean region, species

Nice to
have?

Or

Eating
my Time?

Have de-
cided +go
on

The economic crisis had a severe impact on the demand for FFF. At the end of 2008 and throughout 2009 demand suffered because consumers were spending less on groceries and on higher priced articles, such as FFF. Lower priced fishery products relatively new to the EU market (e.g. pangasius, tilapia) profited from this development

The increased consolidation of importers and retailers will sustain the pressure on prices. In addition, the increasing consolidation will make it harder for smaller suppliers to sell in the EU. It is becoming increasingly important for large suppliers and groups of smaller suppliers to work together in terms of warehousing, logistics and supply.

➔ For more information and tips on working together and forming cooperation in your own country refer the CBI's module on 'Product strategy'.

**I am principally decided
what are my questions**



**EU and focus countries,
now?:**

Which areas and segments do I best fit in, which trends do I need to understand:



Trends and segments for frozen fish and fish fillets in the EU

Am I competitive on the EU market, where how would I achieve best prices



Prices and price developments frozen fish and fish fillets

Import regulations and EU buyer requirements, Market Access Requirements are well defined and relevant, do I know (about) them all?











EU buyer requirements

EU buyer requirements

-  Buyer requirements for frozen crustaceans and cephalopods
-  Buyer requirements for frozen fish and fish fillets
-  Buyer requirements for prepared and preserved fish
-  EU legislation Contaminants in food
-  EU legislation Endangered species - CITES
-  EU legislation Fishery products
-  EU legislation Food contact materials
-  EU legislation Food labelling
-  EU legislation General Food Law



-  EU legislation Hygiene of food - HACCP
-  EU legislation Microbiological contamination of food
-  European buyer requirements fish and aquaculture products
-  HACCP- Hazard Analysis Critical Control Point
-  International Codes of Conduct and other initiatives for responsible
-  International sustainability labels for aquaculture products
-  International sustainability labels for wild fisheries products
-  Occupational health and safety in the fishery sector



Buyer requirements for frozen fish and fish fillets

Buyer requirements for frozen fish and fish fillets



Buyer requirements are all the requirements you can expect from your EU buyer. They can be divided into two groups: legislation and additional, non-legal requirements.

Legal requirements

Legal requirements are the minimum requirements products marketed in the EU must meet. Products that fail to meet these requirements are not allowed on the EU market. EU

	More information	Member state implementation
Additional	EU legislation: Endangered species (CITES)	Applies to all countries
Contaminants in food	EU legislation: Contaminants in food	Applies to all countries
Fishery products	EU legislation: Fishery products	See link EU legislation

Leads you on CD to:



EU legislation Contaminants in food

EU legislation: Contaminants in food

If you are a food exporter in a developing country and want to export your products to the EU, you have to make sure your products do not contain contaminants in levels that are dangerous to consumers' health. The EU has established legislation that regulates the maximum levels for selected contaminants in specific products or product groups. If your food product contains a contaminant exceeding the levels



DANGER DANGER DANGER

for you and the specific threshold limits applicable to your product. It includes in the following order:

1. A general introduction on the scope (which products and contaminants are covered) and the requirements of the legislation.
2. A step-by-step scheme to check which contaminants can be presented in your product and how to find the specific limits in the legislation, with the help of the overview table available in Annex I.
3. Additional information on codes of practices developed by the EU to minimise the presence of contaminants in food products and on the contaminants covered by the legislation (in Annex II).

present in
ing,

You get
an
over-
view
+

Please note that the EU legislation on maximum levels for certain contaminants in food

Leads on CD deeper



into the subject:



EU legislation Contaminants in food

Outline of the legislation



Regulation (EC) 1881/2006 sets maximum levels for contaminants in food to be placed on the EU market. The Regulation is applicable and is the same in all EU Member States.

Aim & scope

The aim of the Regulation is to guarantee food safety in the EU by setting acceptable levels of contaminants in food. It covers different food products, including fruits and vegetables,

The following contaminants are covered in the legislation and further divided into subgroups.

1. Nitrates (click [here](#))¹
2. Mycotoxins (Aflatoxins, Ochratoxin A, Patulin, Fusarium mycotoxins: Deoxynivalenol (DON), Zearalenone, Fumonisin, and T-2 and HT-2 toxins) (click [here](#))
3. Metals (lead - Pb, cadmium- Cd, mercury- Hg, and inorganic tin) (click [here](#))
4. 3-monochloropropane-1, 2-diol (3-MCPD) (click [here](#))
5. Dioxins and PCBs (click [here](#))
6. Polycyclic aromatic hydrocarbons (PAH) (click [here](#))

For more information on these contaminants refer to Annex 2 (click [here](#))

Requirements

**Here
you can
dive
further
into the
subject**

Buyer Requirements:



more than 1 way to approach it:
buyer requirements of your product:

Further Options 2) you go through:



Fact sheets

- Frozen cuttlefish and squid in Spain
- Frozen octopus in Italy
- Frozen octopus in Portugal
- Frozen octopus in Spain
- Frozen shrimps and prawns in Belgium
- Frozen shrimps and prawns in France
- Frozen shrimps and prawns in Italy
- Frozen shrimps and prawns in Spain
- Frozen shrimps and prawns in the United Kingdom
- Pangasius in Germany
- Pangasius in Poland
- Pangasius in The Netherlands
- Pangasius in the United Kingdom
- Prepared and preserved anchovies in France

**Or 3)
ADEX FACT SCHEETS**

**OR
pass it on to your
QM (responsibility?)**

Thank You!





You have decided for your favorite markets, now it is time to strategize. Important items: Competition and Price:

