



European Fish and Seafood Market

Lima, September

Fishery products

CBI Market Intelligence | 2011

Introduced by

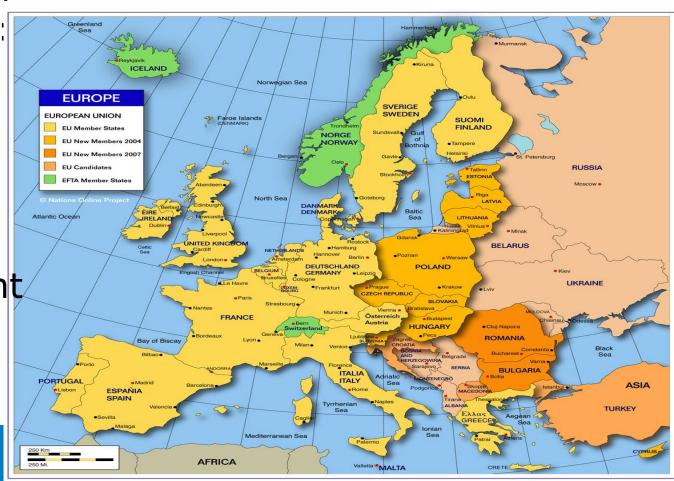
Siegfried Bank

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:

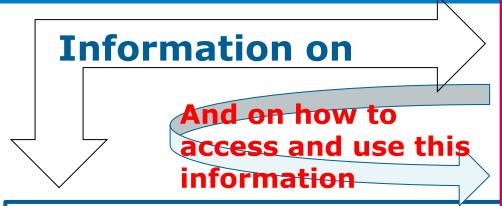
Nowadays: EU = 27 diferent Countries



What Information is



provided?



\mu EU buyer requirements

Fact sheets

Market Intelligence

뷀 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

An introduction to CBIs market information for fishery product

Buyer requirements for frozen crustaceans and cephalopods

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

List of sources for fish and fishery products Prices and price developments frozen crustaceans and cephalog Prices and price developments frozen fish and fish fillets 🔀 Prices and price developments prepared and preserved fish 🔼 Promising EU export markets frozen crustaceans and cephalopo 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 crusta

Buyer requirements for frozen fish and fish fillets

Buyer requirements for prepared and preserved fish

Trade structure and channels for frozen fish and fish fillets

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 you company structure and decided you want to export and you have decided that the EU is an optional Export Market.

Remaining 2 principal Questions:

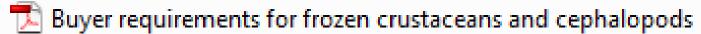
- What product? !!! That will be one of the products you have:
 1 3?!
- 2. What market in Europe? ???? More difficult! 27 Countries and more than 1 criteria as we will explain to you:

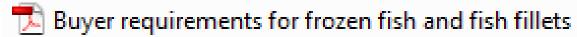
Let us call up and check **Market intelligence** on basis of your <u>decided product</u> – *fish and fish fillets*:

Market intelligence:









🔼 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

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 froze		en Frozen imports		Share of			
	Total demand		Total production		imports		from DC		DC in	
	volume	growth	volume	growth	volume	growth	volume	growth	total	Attractivity
	2008	'04-'08	2008	'04-'08	2009	'04-'09	2009	'04-'09	imports	index
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%	++

Promising EU export fish fillets:

markets: frozen fish and

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?

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 prices articles, such as FFF.

Or

Lower priced fishery products relatively new to the EU market (e.g. pangasius, tilapia) profited from this development

Eating

my Time?

Have decided +go

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'.

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on

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 buyer requirements







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:



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Buyer requirements for frozen fish and fish fillets

Buyer requirements for frozen fish and fish fillets

special **Interest** klick

More information

EU legislation:

Member stat implementar

Applies to all

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

n	Endangered species	countries
dditional	(CITES)	
ıaximum	EU legislation:	Applies to all
specified	Contaminants in	countries
	<u>food</u>	
on relevant	EU legislation:	See link EU
ortant	Fishery products	legislation
es must be		

Containinants in	Regulation (EC)	The EO 1000 safety policy has set maximum	EU legislation:	Applies to all
food	1881/2006	levels for certain contaminants in specified	Contaminants in	countries
		products or product groups.	<u>food</u>	
Fishery products	Directive 96/22/EEC	In the EU, there is specific legislation relevant	EU legislation:	See link EU
	Directive 96/23/EEC	to fishery products. The most important	Fishery products	legislation
	Decision 2006/766/EC	requirement is that countries and		
	Regulation (EC)	establishments in non-EU countries must be		
	1251/2008	approved by the EU; i.e. be able to show that		

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

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

- A general introduction on the scope (which products and contaminants are covered) and the requirements of the legislation.
- 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.
- 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).

GER DANGER DANGE

resent in ing,

> You get an overview +

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.

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

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

Here you can dive further into the subject

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Buyer Requirements:

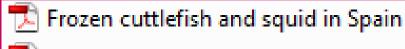


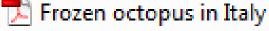
more than 1 way to approach it: buyer requirements of your product:

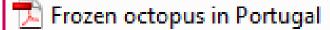
Further Options 2) you go through:

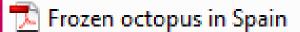


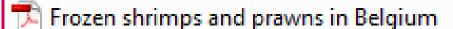
Fact sheets

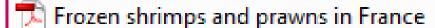












The Frozen shrimps and prawns in Italy

🏗 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:

