



THE EU MARKET OF FISH PRODUCTS FROM AQUACULTURE GROWTH PROSPECTS

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Eurofish
INTERNATIONAL ORGANISATION

EUROPEAN AQUACULTURE PRODUCTION



**2016: 1,3 mill
tonnes**

Photo by Aleksandr Popadin



**Marine
aquaculture
73%**

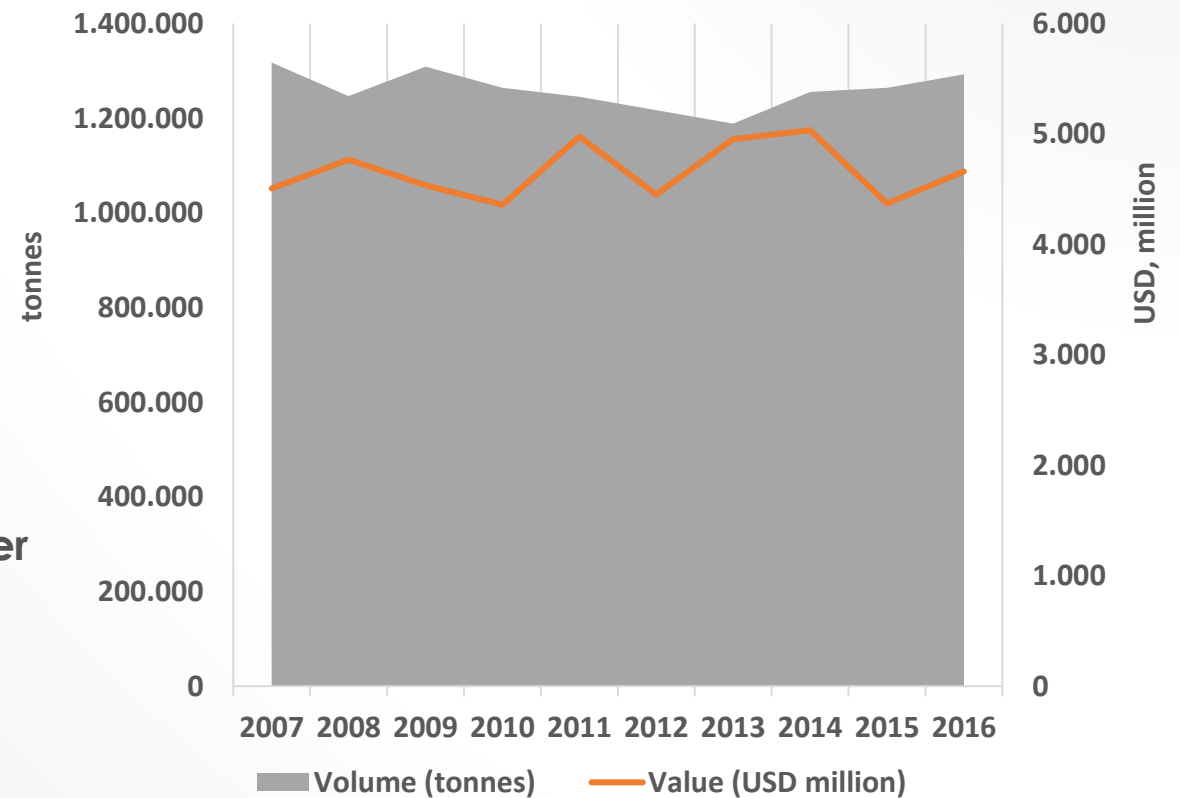


**Freshwater
aquaculture
22%**



**Brackishwater
5%**

**Development of the aquaculture production
in the EU**



Source: FishSTATJ, FAO, 2018

EUROPEAN TRADE OF FISHERIES PRODUCTS (2017)



Extra-EU import:

5.9 million tonnes (-1% to 2016)
EUR 25.3 billion (+4% to 2016)



Extra-EU export:

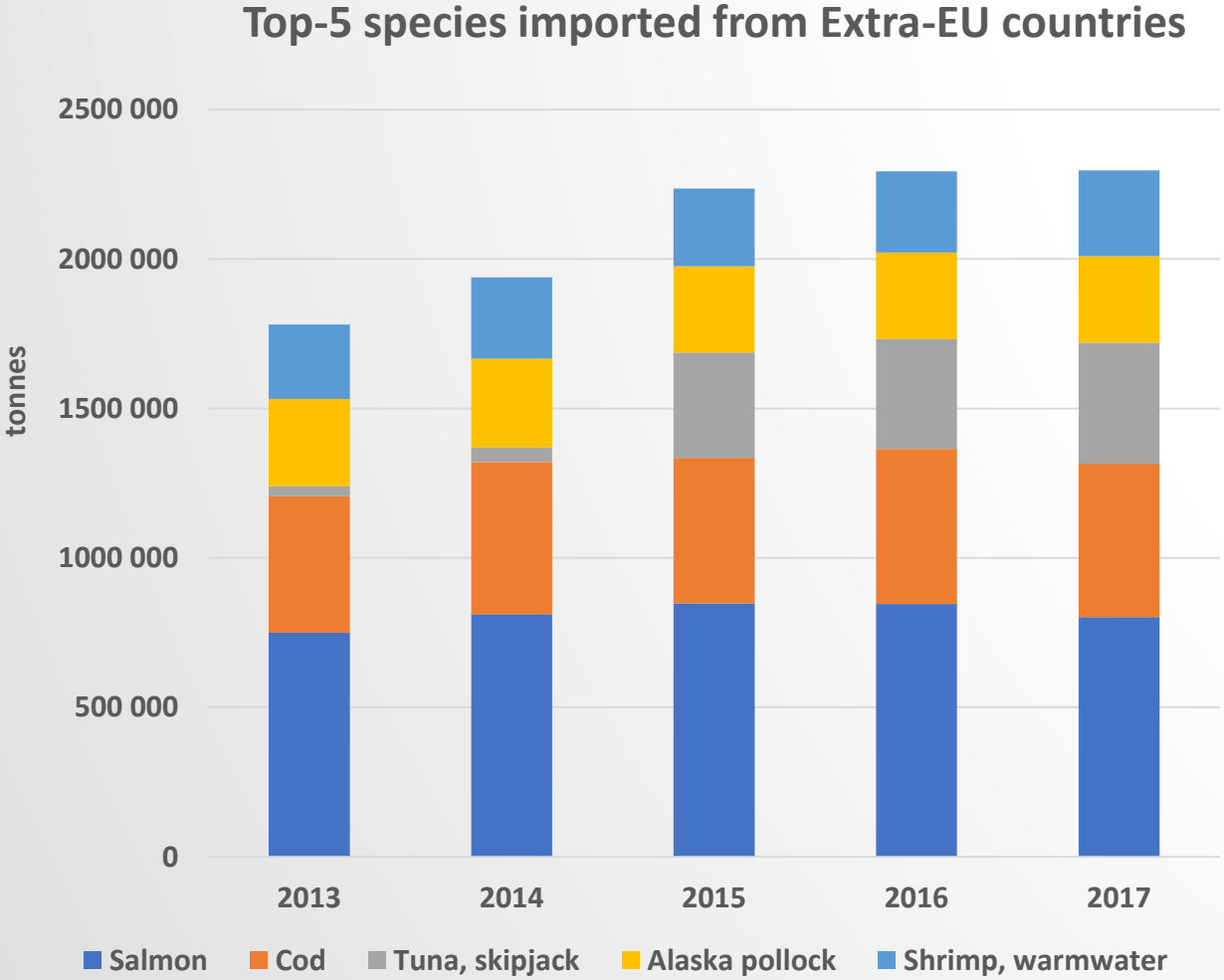
2 million tonnes (+6% to 2016)
EUR 5 billion (+7% to 2016)



Intra-EU export:

6.4 million tonnes (+4% to 2016)
EUR 26.6 billion (+6% to 2016)

EUROPEAN IMPORT FROM EXTRA-EU COUNTRIES

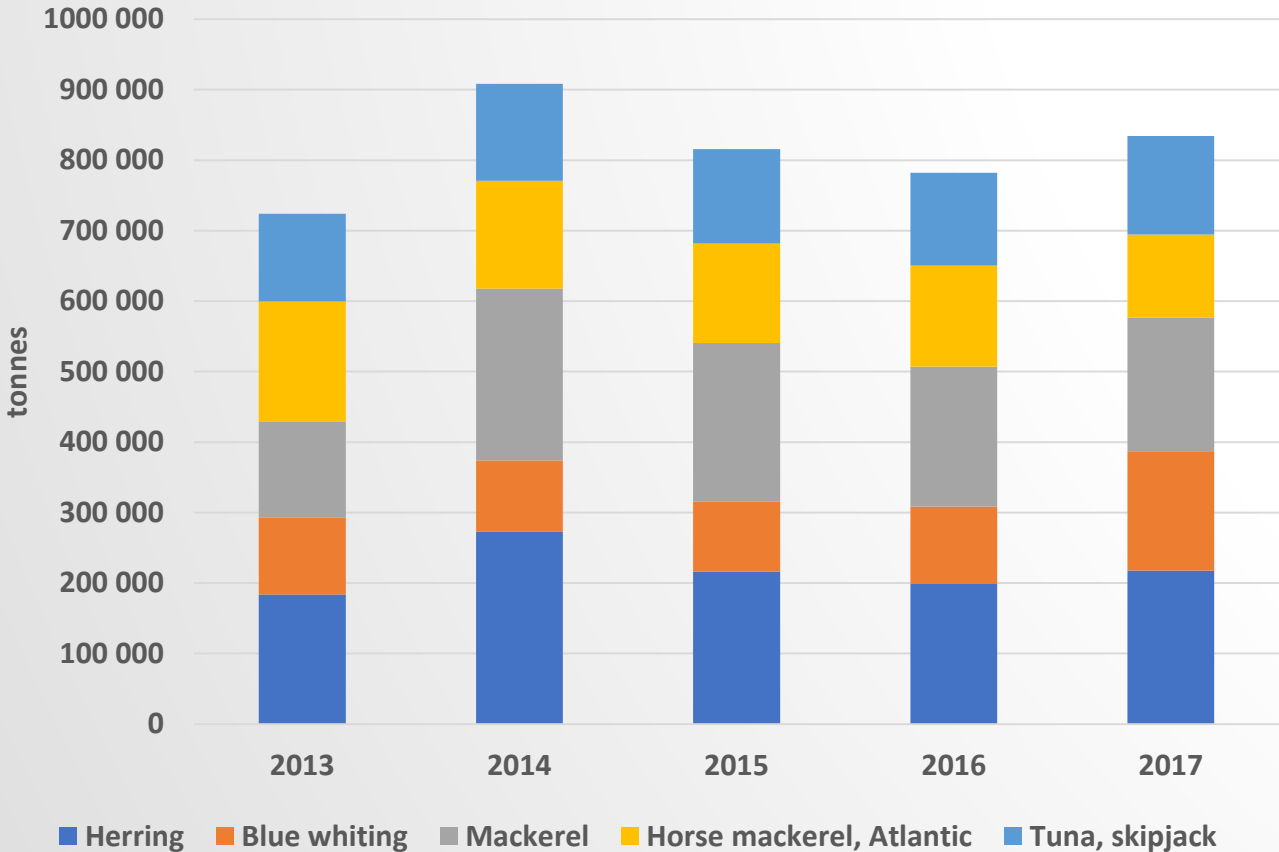


	2017 (tonnes)	2017/2013
Salmon	802 442	7%
Cod	512 640	12%
Tuna, skipjack	405 253	>500%
Alaska pollock	289 785	-0.5%
Shrimp, warmwater	286 353	15%
Other	3 646 410	-6%
Totals	5 942 883	5%

Source: EUMOFA, 2018

EUROPEAN EXPORT TO EXTRA-EU COUNTRIES

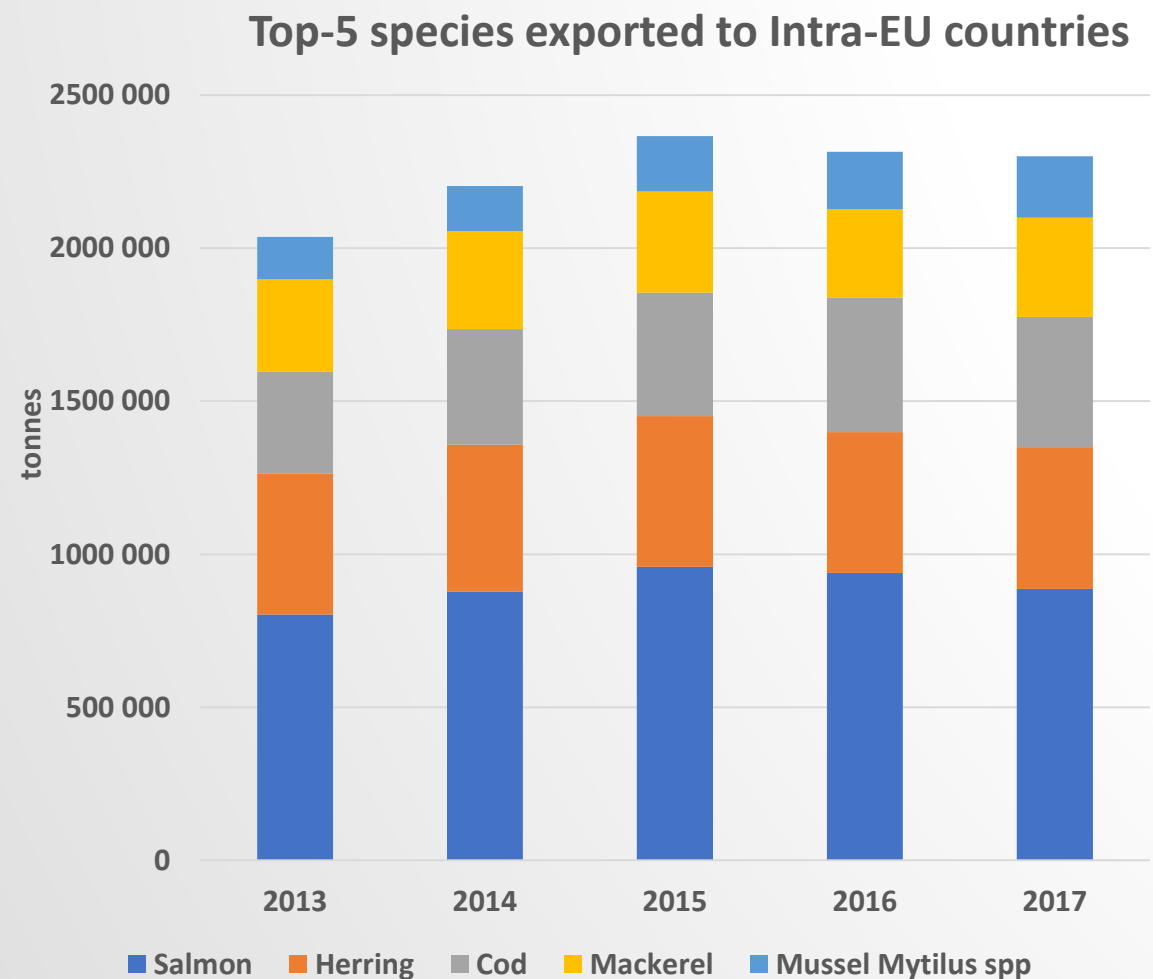
Top-5 species exported to Extra-EU countries



	2017 (tonnes)	2017/2013
Herring	217 868	19%
Blue whiting	169 410	55%
Mackerel	189 243	38%
Horse mackerel, Atlantic	118 173	-31%
Tuna, skipjack	139 657	12%
Other	1 143 642	-3%
Total	1 977 992	4%

Source: EUMOFA, 2018

EUROPEAN EXPORT TO INTRA-EU COUNTRIES



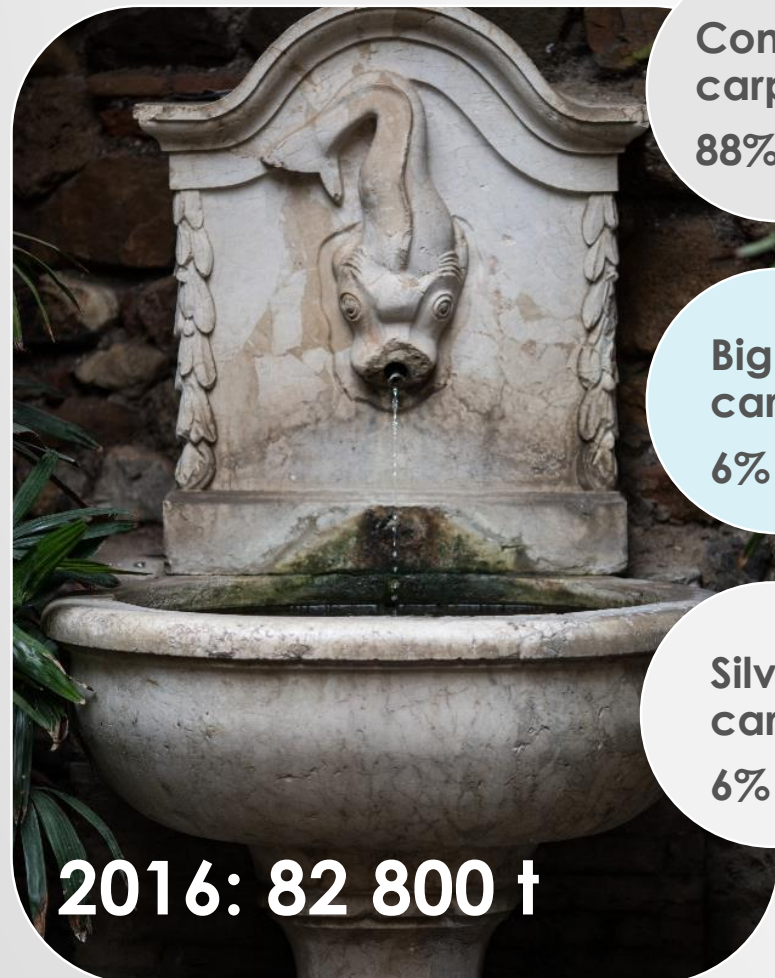
	2017 (tonnes)	2017/2013
Salmon	886 416	10%
Herring	463 728	1%
Cod	425 645	27%
Mackerel	324 035	7%
Mussel Mytilus spp	200 825	45%
Other	4 151 873	15%
Totals	6 452 522	14%

Source: EUMOFA, 2018

A whole baked carp is presented in a black rectangular tray, resting on a piece of parchment paper. The fish is positioned diagonally, with its head towards the top left. It is surrounded by a variety of vegetables: sliced potatoes, whole baby carrots, green beans, cherry tomatoes, and fresh basil leaves. Thin slices of orange are also scattered around the fish. The entire dish is set against a rustic, weathered wooden background.

CARP

CARP



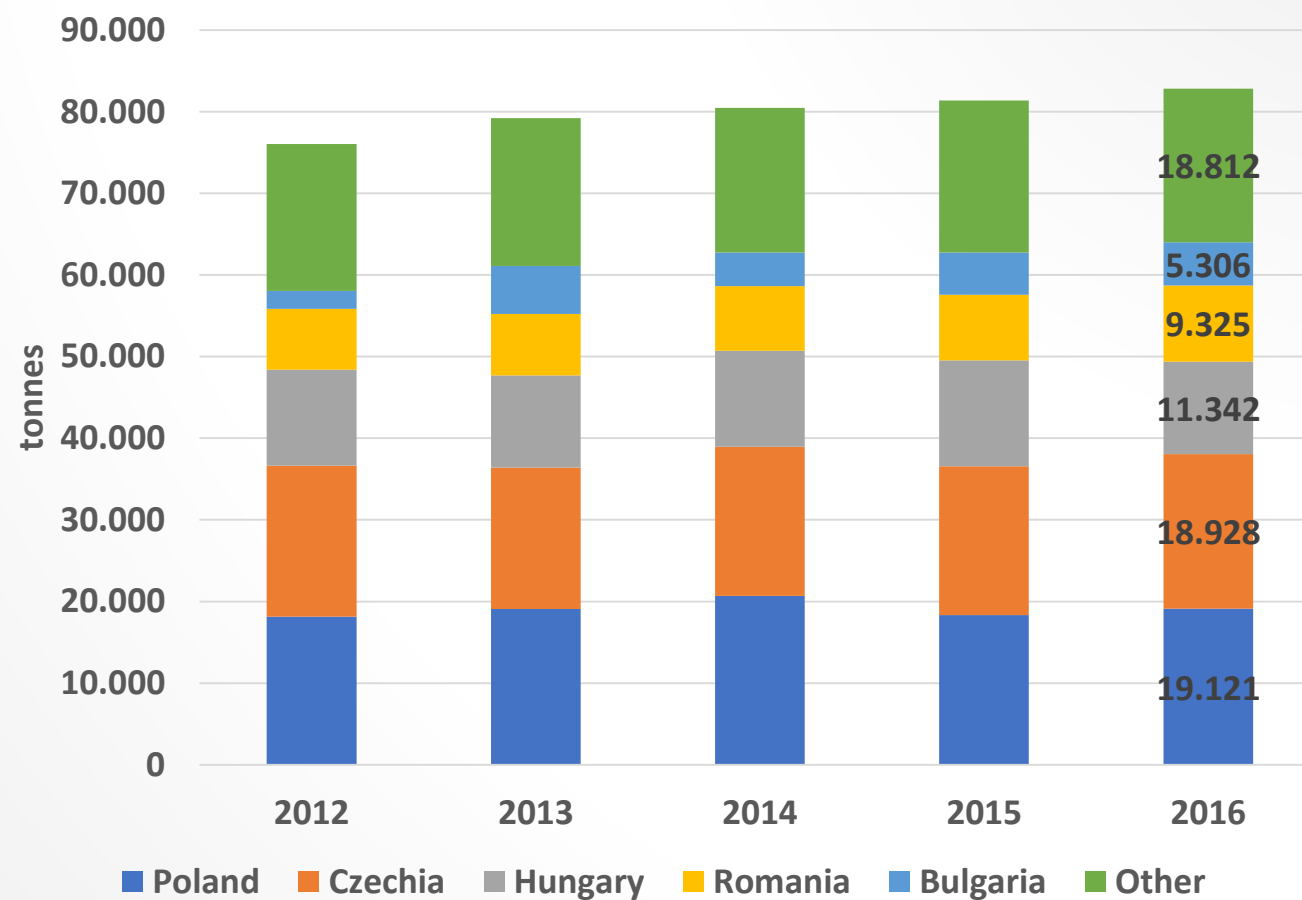
Common
carp
88%

Bighead
carp
6%

Silver
carp
6%

2016: 82 800 t

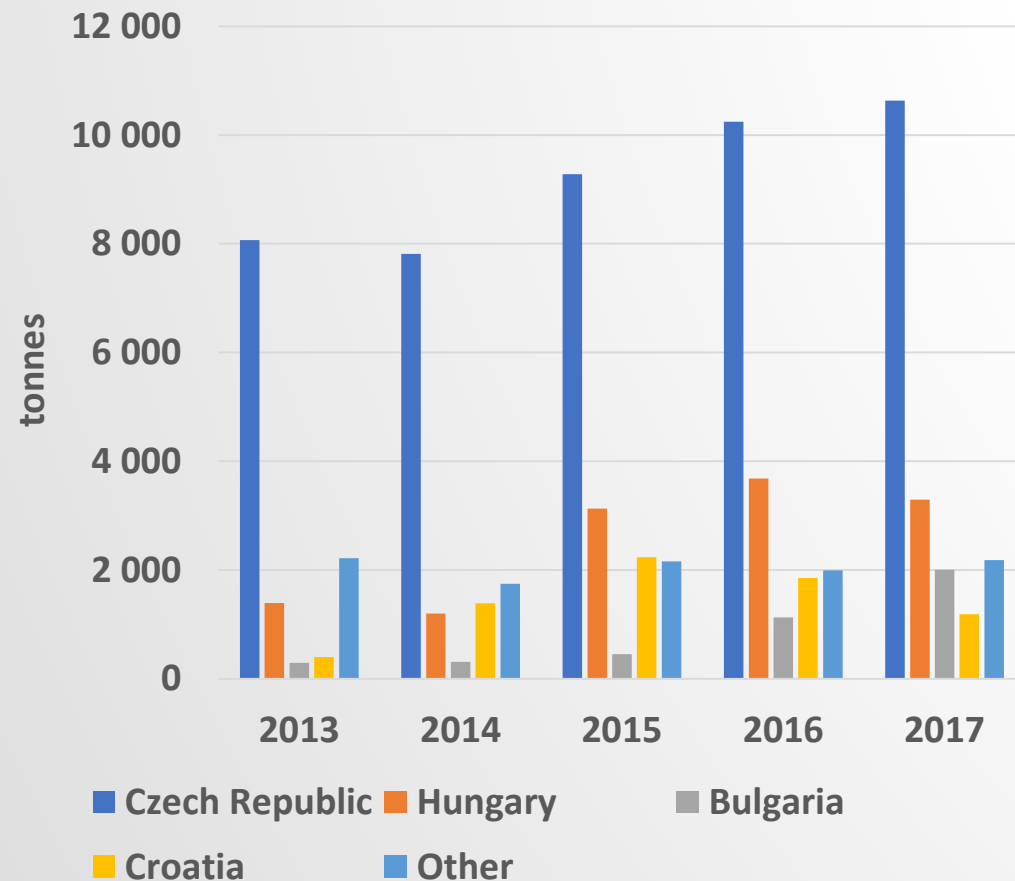
Production of farmed carp in the EU



Source: FishSTATJ, FAO, 2018

CARP

Main exporting countries of carp in the EU (tonnes)

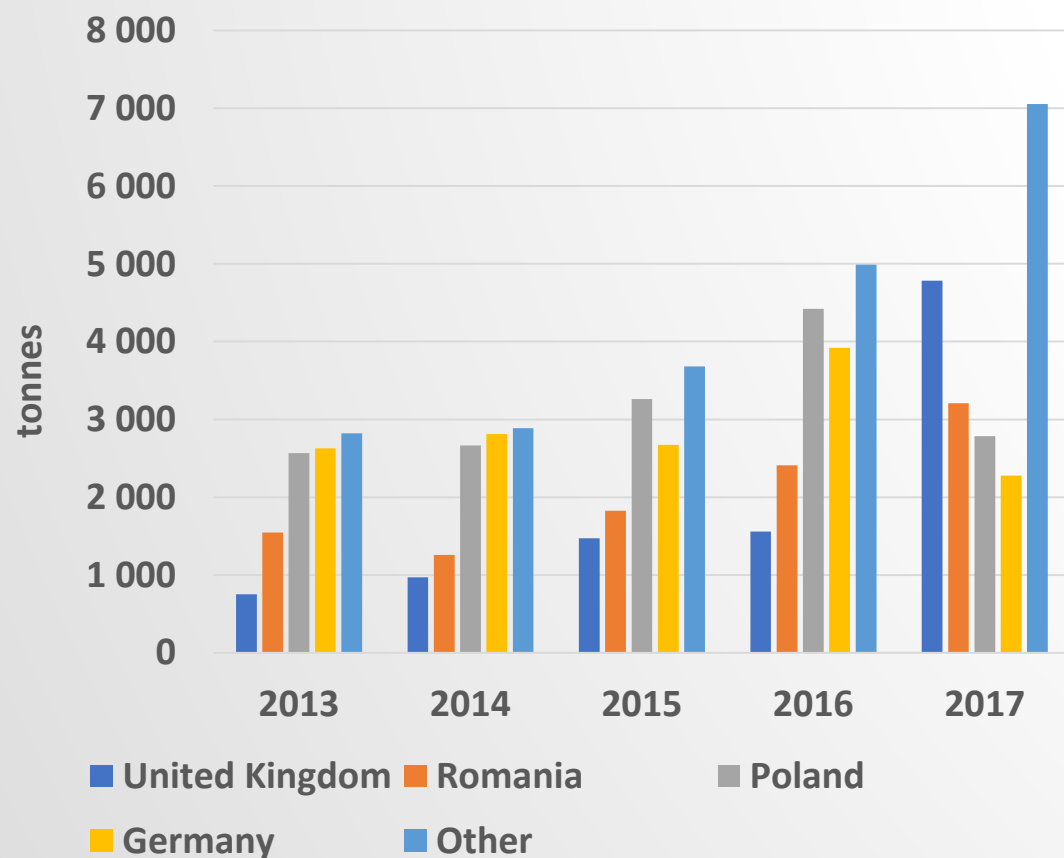


	2013	2014	2015	2016	2017	2017/2013
Czech Republic	8 070	7 812	9 283	10 244	10 633	+31%
Hungary	1 393	1 197	3 131	3 683	3 291	+136%
Bulgaria	291	307	450	1 126	2 006	>500%
Croatia	395	1 386	2 233	1 853	1 189	+200%
Other	2 214	1 746	2 159	1 995	2 181	-1%
Totals	12 363	12 448	17 257	18 901	19 301	+56%

Source: EUMOFA, 2018

CARP

Main importing countries of carp in the EU (tonnes)

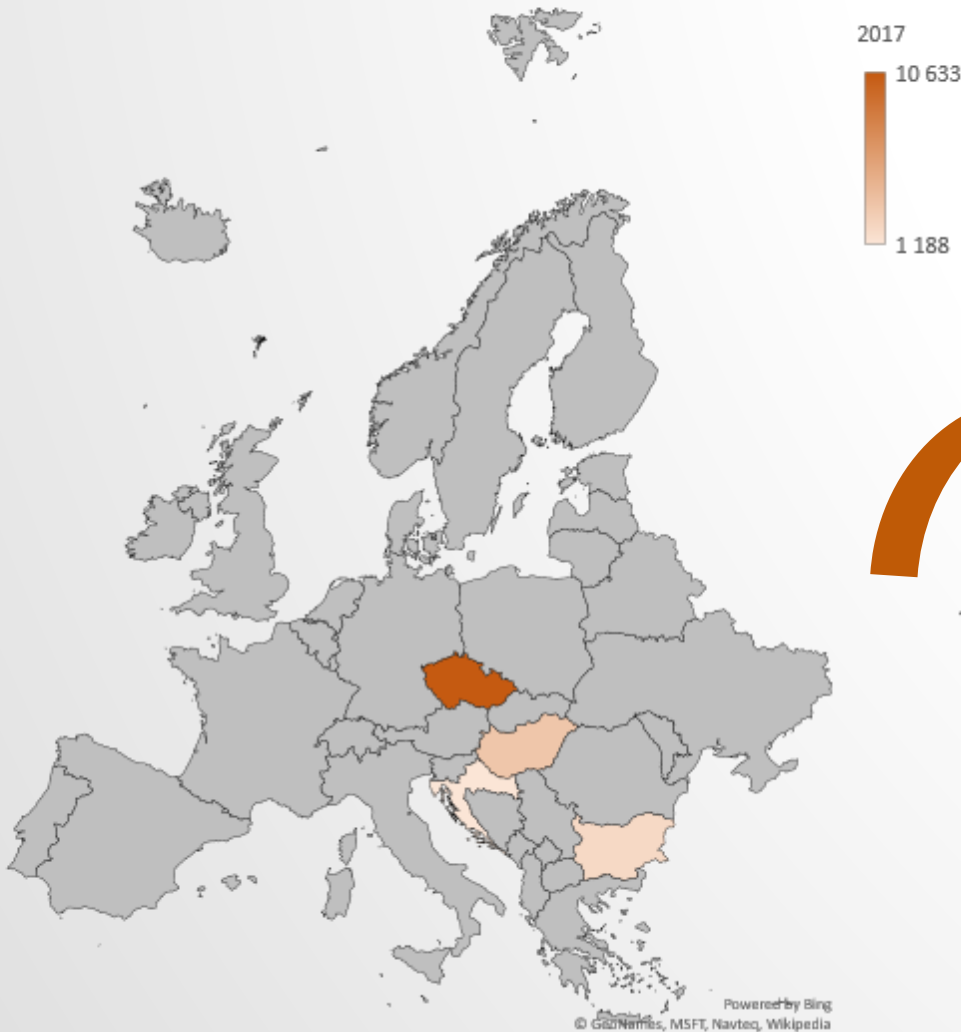


	2013	2014	2015	2016	2017	2017/2013
United Kingdom	751	970	1 469	1 556	4 783	>500%
Romania	1 545	1 258	1 823	2 410	3 207	+107%
Poland	2 568	2 663	3 262	4 422	2 785	+8%
Germany	2 629	2 811	2 674	3 918	2 279	-14%
Other	2 823	2 889	3 680	4 989	7 055	+150%
Totals	10 315	10 590	12 907	17 296	20 109	+95%

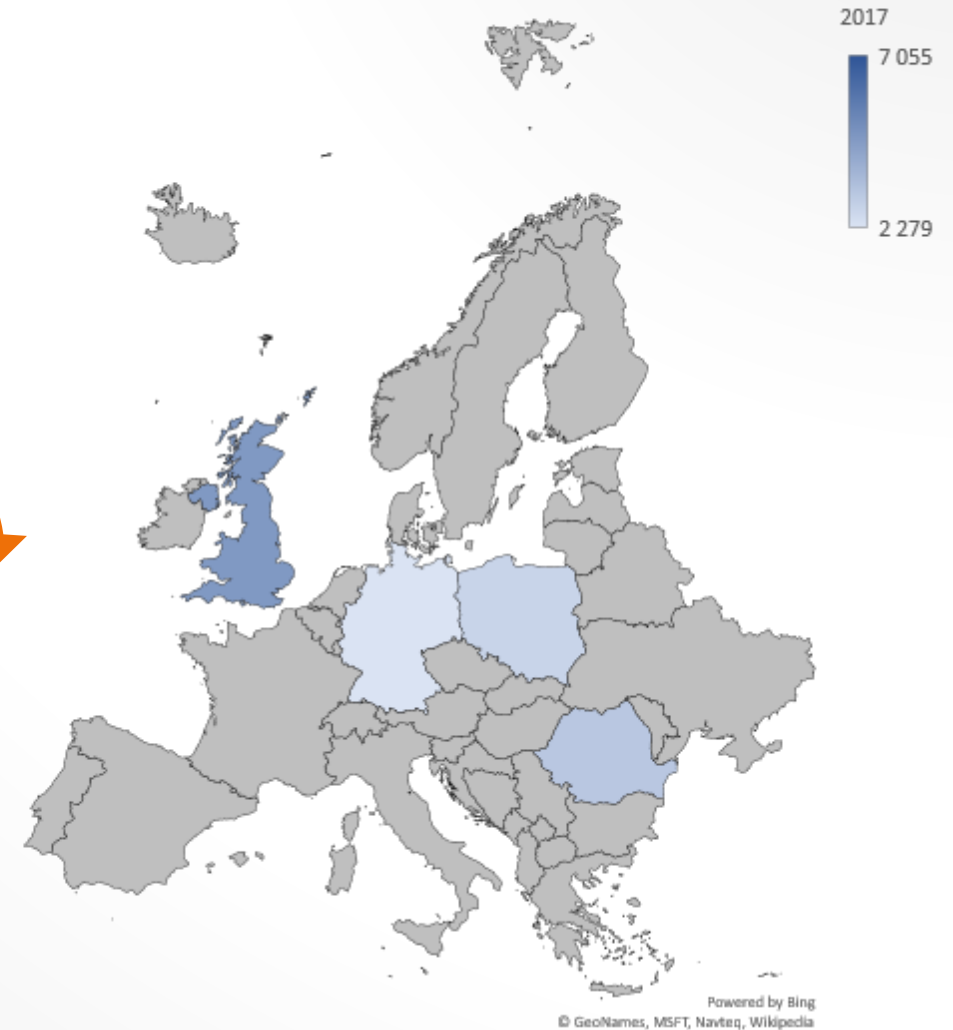
Source: EUMOFA, 2018

KEY TRADING COUNTRIES OF CARP IN THE EU

Export of carp products



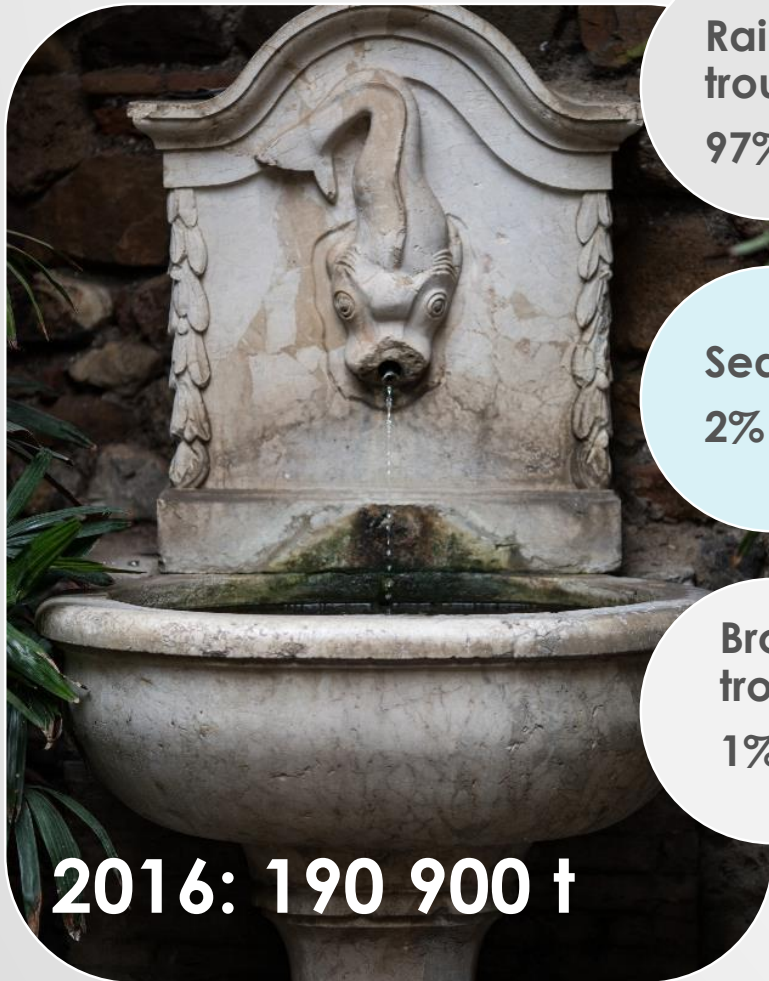
Import of carp products





TROUT

TROUT



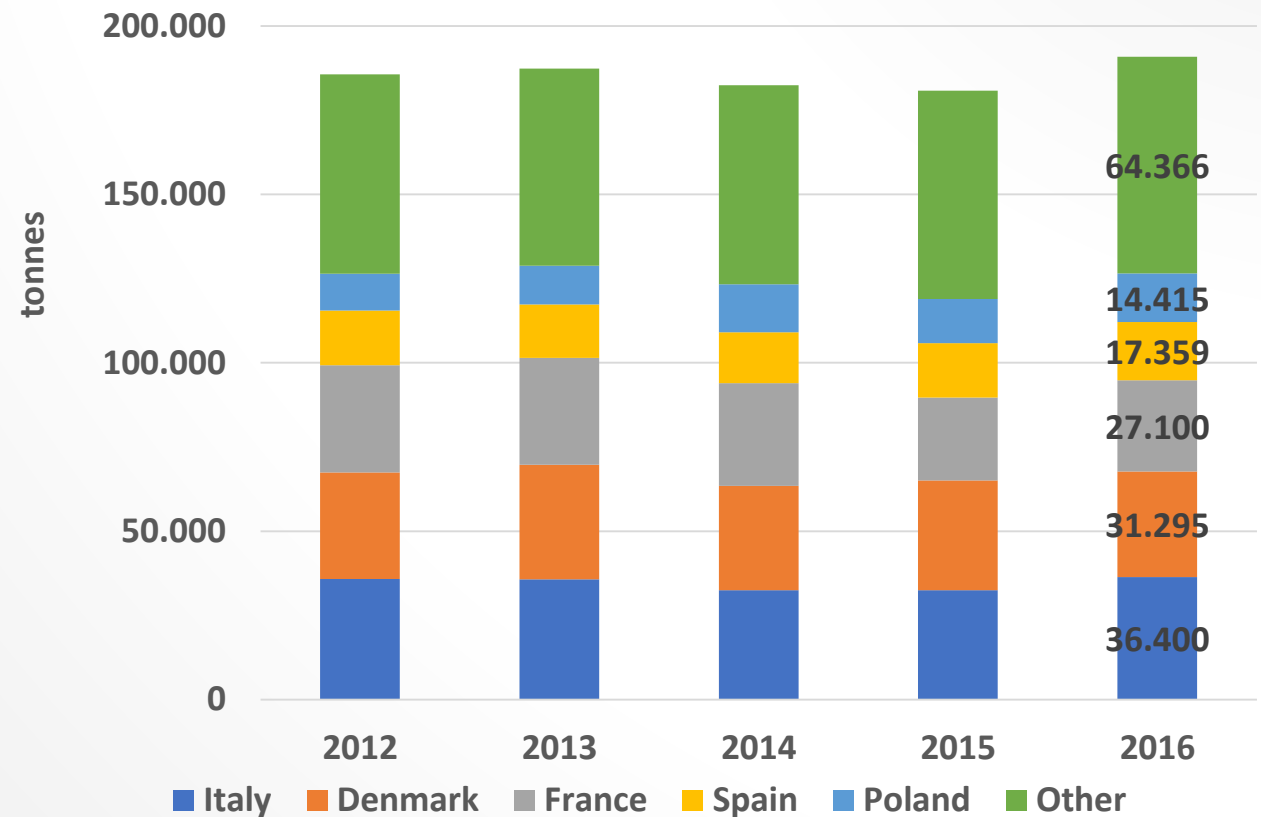
Rainbow trout
97%

Sea trout
2%

Brook trout
1%

2016: 190 900 t

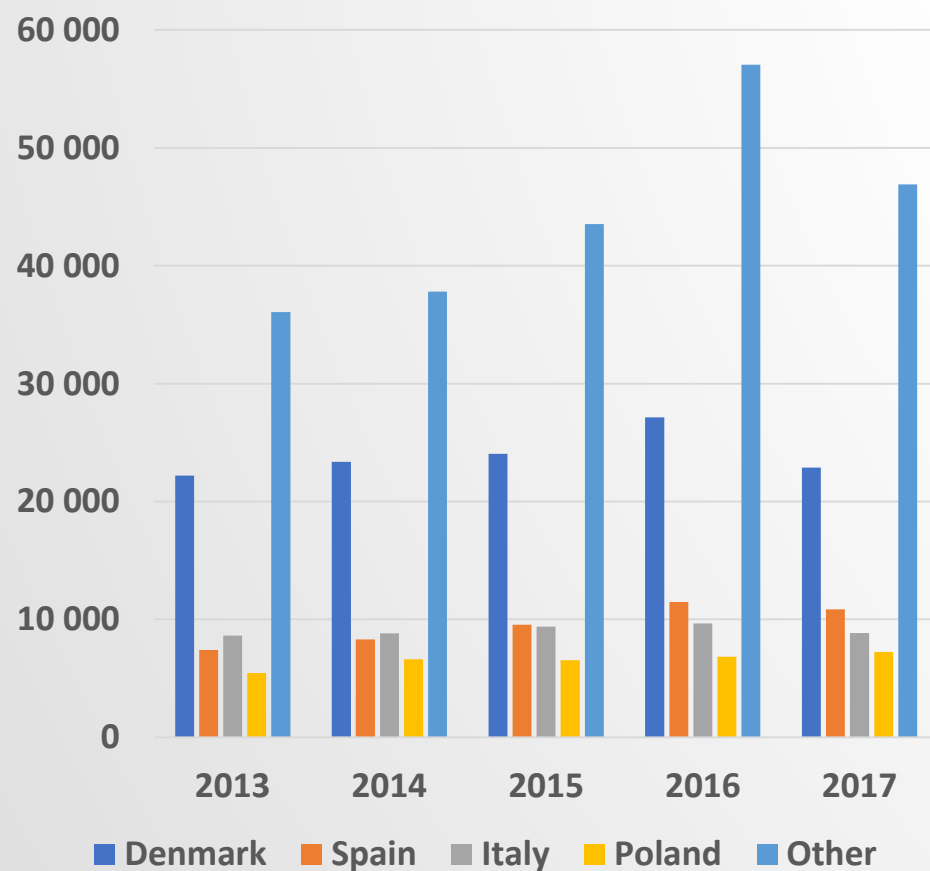
Production of farmed trout in the EU



Source: FishSTATJ, FAO, 2018

TROUT

Main exporting countries of rainbow trout in the EU (tonnes)

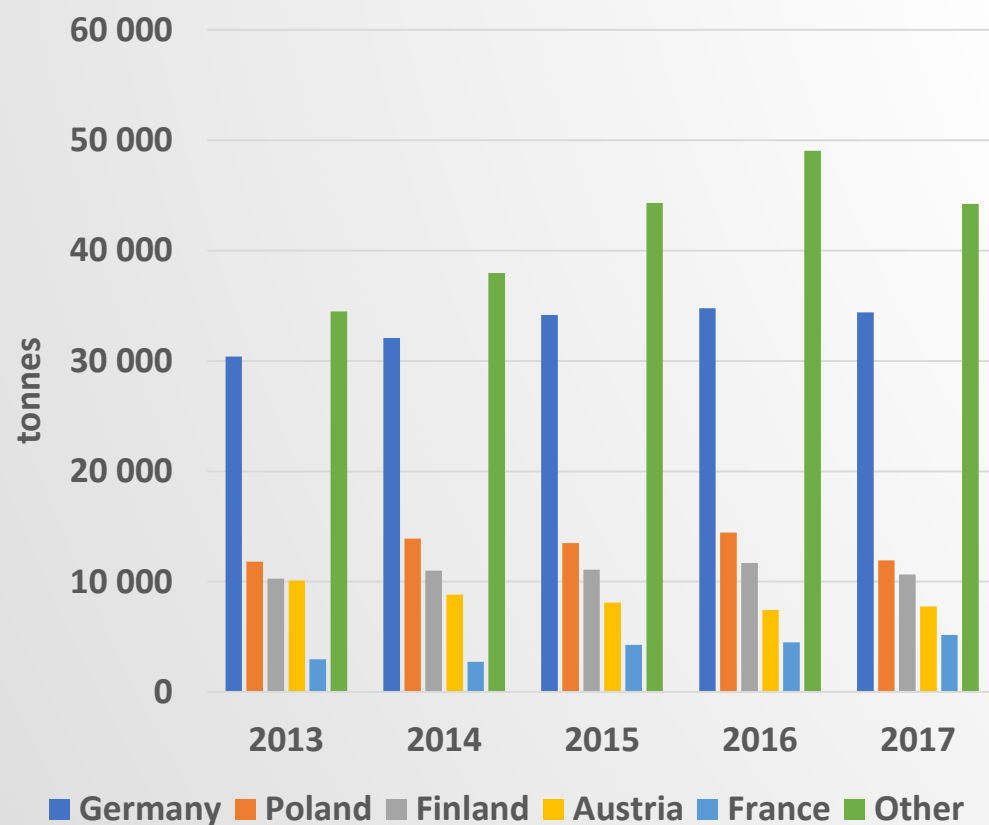


	2013	2014	2015	2016	2017	2017/2013
Denmark	22 211	23 368	24 050	27 152	22 871	3%
Spain	7 412	8 309	9 544	11 489	10 843	46%
Italy	8 624	8 822	9 401	9 650	8 843	3%
Poland	5 455	6 624	6 526	6 832	7 243	33%
Other	36 060	37 800	43 541	57 053	46 899	30%
Totals	79 761	84 923	93 061	112 175	96 698	21%

Source: EUMOFA, 2018

TROUT

Main importing countries of rainbow trout in the EU (tonnes)

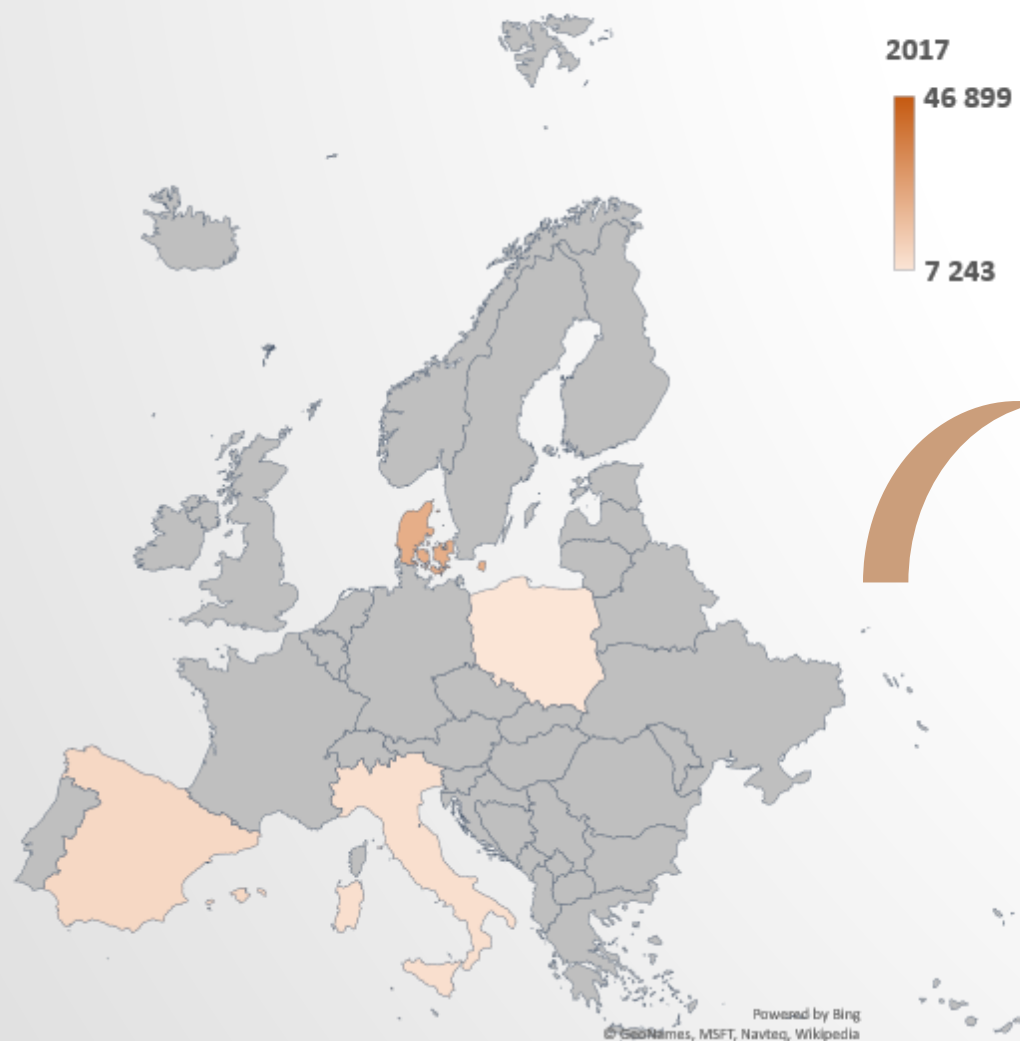


	2013	2014	2015	2016	2017	2017/2013
Germany	30 401	32 091	34 164	34 790	34 400	13%
Poland	11 804	13 881	13 503	14 440	11 933	1%
Finland	10 275	11 006	11 081	11 706	10 645	4%
Austria	10 107	8 828	8 089	7 421	7 744	-23%
France	2 967	2 732	4 265	4 488	5 177	74%
Other	34 484	37 980	44 323	49 043	44 223	28%
Totals	100 039	106 517	115 425	121 889	114 123	14%

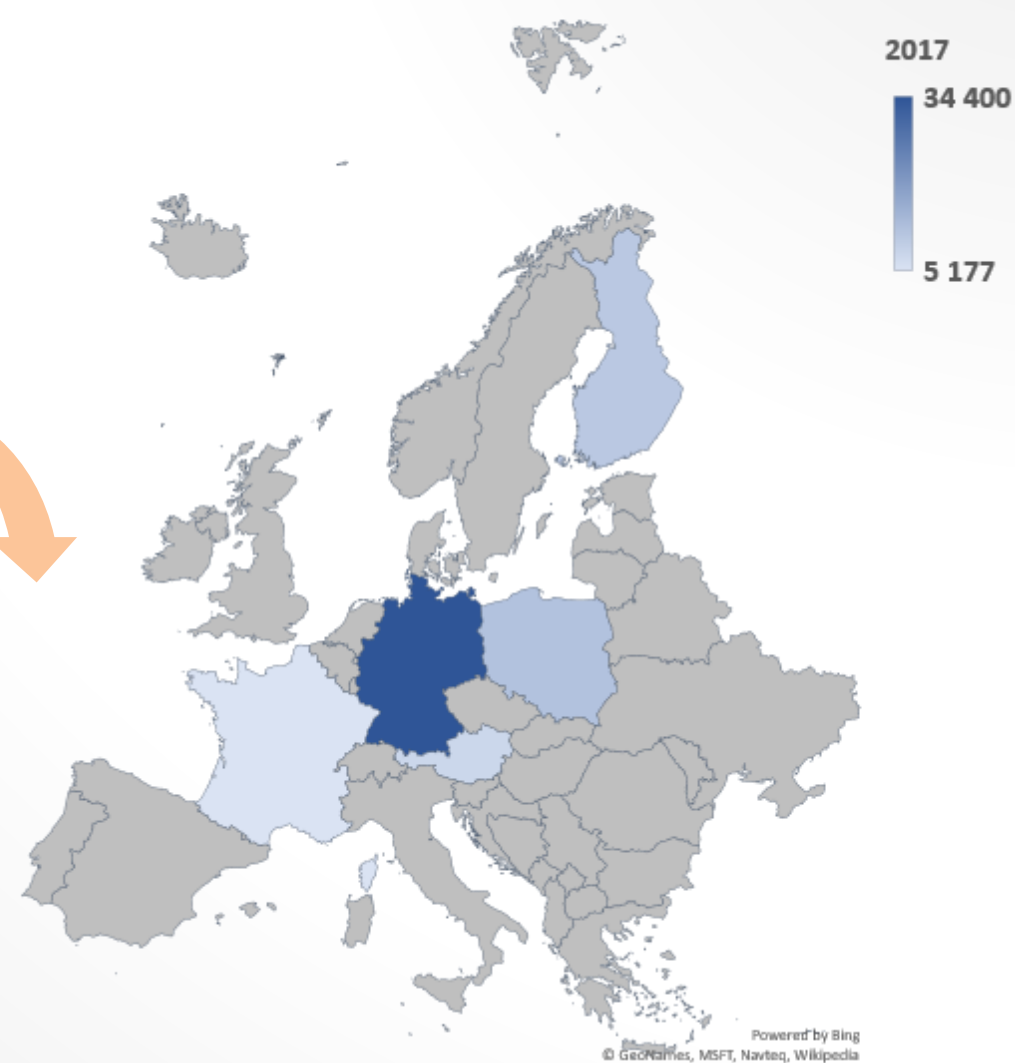
Source: EUMOFA, 2018

KEY TRADING COUNTRIES OF TROUT IN THE EU

Export of trout products



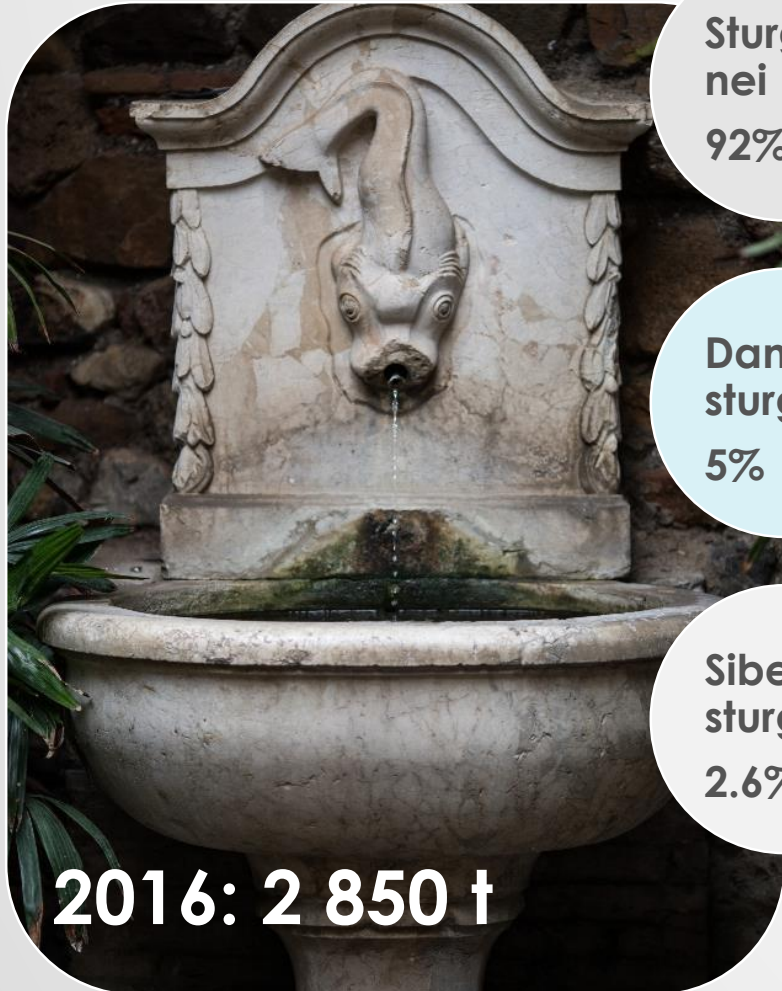
Import of trout products



STURGEON



STURGEON



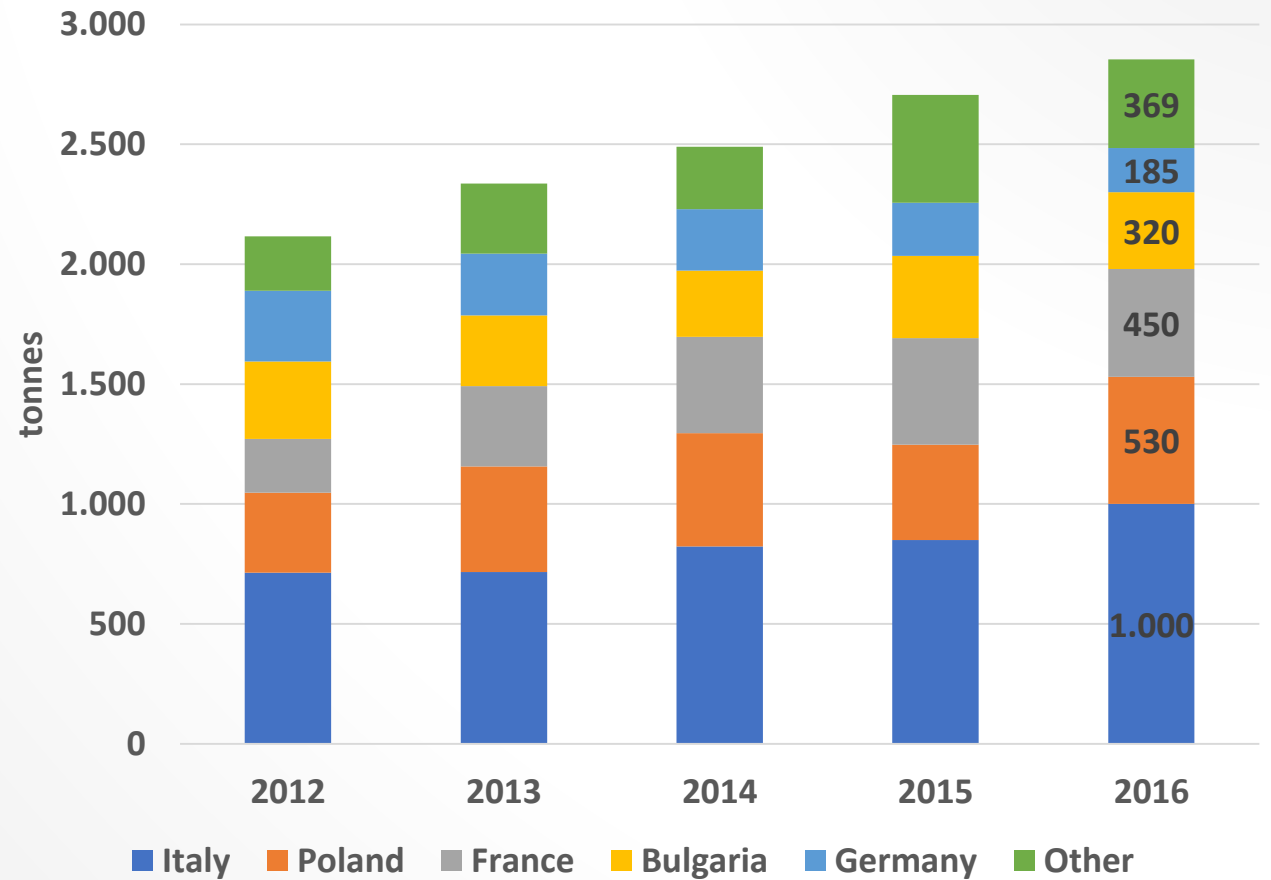
Sturgeons
nei
92%

Danube
sturgeon
5%

Siberian
sturgeon
2.6%

2016: 2 850 t

Production of farmed sturgeon in the EU



Source: FishSTATJ, FAO, 2018

STURGEON



**Sturgeon, live or
processed**

International trade of sturgeon meat (tonnes):

Main importing country	2012	2013	2014	2015	2016
Russia	1 075	1 391	1 457	992	675
Ukraine	-	-	-	-	22

Source: FishSTATJ, FAO, 2018

STURGEON



Caviar (sturgeon roe)

Leading markets for the EU export of caviar (tonnes)

		2014	2015	2016	2017
European import of caviar from Extra-EU countries	EUR/kg	412	353	333	309
	tonnes	24.4	16.8	23.1	30.6

Source: EUROSTAT/EUMOFA, 2018

Intra-EU export of caviar from the EU		2014	2015	2016	2017
	EUR/kg	428	386	383	370
	tonnes	39.1	38.3	44.0	58.1
Extra-EU export of caviar from the EU	EUR/kg	443	431	416	396
	tonnes	29.2	30.9	32.2	37.3

Source: „The caviar market. Production, trade and consumption in and outside the EU”
EUROSTAT/EUMOFA, 2018

STURGEON



Caviar substitutes

Leading markets for the EU export of caviar substitute products (tonnes)

	2013	2014	2015	2016	2017
France	745	1 128	1 445	11 172	1 146
Italy	222	200	209	245	255
Spain	212	202	256	239	259
Germany	1 761	1 173	1 652	347	347
Other	4 554	4 239	4 670	3 702	3 614
<i>Subtotal Intra-EU</i>	4 594	4 564	5 531	14 201	4 069
<i>Subtotal Extra-EU</i>	1 138	1 204	1 048	1 156	1 205
TOTAL	5 733	5 768	6 579	15 357	5 275

European import of caviar substitute products		2013	2014	2015	2016	2017	2017/2013
16043200 Caviar substitutes prepared from fish eggs	EUR 1000	96 612	86 491	94 582	95 304	100 395	4%
	tonnes	10 246	10 227	10 750	10 083	9 319	-9%

Source: EUROSTAT, 2018

Thank you for your attention!