



FINFISH STUDY 2013

A.I.P.C.E.-C.E.P
EU Fish Processors and Traders Association
Brussels, December 2013

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1. The Purpose of the Finfish Study

The European fish and seafood added value processing industry relies on a consistent and sustainable supply of raw materials to satisfy consumer demand for fish and seafood products, both for domestic and out-of-home markets.

The EU Fish Processors and Traders Association (AIPCE-CEP) and its members use the Finfish Study at EU and member state level to exemplify the need for imported seafood to produce added value seafood within Europe.

We recognise that much of our focus continues to be in whitefish but the diversity of what the European fish processing and trading sectors use is actually much wider yet in all varieties the dependence on imported material is considerable.

These imports have been the lifeblood of the industry for many years and fulfil an essential role.

This study is prepared by and for the processing industry in Europe for more than 20 years and has been a very useful tool in explaining the activities of the processing industry.

On occasion other independent studies have validated its findings and conclusions. It's relevance as a voice for our industry remains compelling and of considerable value.

Competition for fish and seafood is now on a global stage and represents one of the largest sectors of all in international trade. The need to conduct this trade responsibly has never been greater and within AIPCE-CEP we have been engaged in several initiatives to ensure our role in this is properly fulfilled and understood.

We take an active role in helping shape regulatory matters to achieve their aims but within a pragmatic framework that ensures proper implementation and effect.

AIPCE-CEP is pro-active in leading the dialogue and we have taken actions within our supply chains ahead of regulatory controls to meet the expectations of stakeholders and consumers. Achieving this needs to be done whilst maintaining a consistent, regular and competitive offering.

Our sources of supply are very diverse and reflect the changing availability from both wild-capture and cultivated fisheries. Although many challenges remain we are increasingly confident that the efforts going into precautionary management, resource allocation and sustainability are paying off in many parts of the world.

The Finfish Study is intended to provide insight into some of these developments and how the supply and consumption are changing.

This study is for information purpose and has been written in full conformity with the legal framework established by existing legislation regarding the defense of competition.

2. Overview of the Study Findings

All figures in the study have been converted to Whole Fish Equivalent (WFE) as we believe this is the fairest means of comparison (please see chapter 3 which explains how we do this).

The commentary will highlight these as appropriate:

Key Findings:

- Total market supply 13.7 million t * down 3 %
- Imported share stable at just over 64 % (8.8 million t) *
- Whitefish dependency unchanged at 89 % for wild-capture species
- EU catches continue to decline and quota utilisation has deteriorated
- Exports recovered by 2.3 % *
- Tuna has become the No 1 species overall and cod is favourite whitefish
- Supply for per capita availability is down by 1 kg at WFE
- Competition is intensifying from other countries and regions

**After restating with revised Conversion Factors*

2.1 Data Base

This report is mainly based on statistics taken from Eurostat 2012 data and refers to the entire EU27 group of member states (any other data is ascribed to source). Eurostat provides information by fishery product, species and/or category. We have undertaken to provide a common comparison base by converting these products back into the actual quantities of whole fish equivalent (WFE) which is consistent with quota and allocation data and we believe is the fairest means of comparison. All tables and figures presented refer to this unit of measure (please see chapter 3 which explains how we do this).

Our final database check is the FAO official figures which are now incorporated for the latest release of 2010 statistics.

When we compile the figures for use in this study there can be gaps/anomalies in the official statistics that are corrected retrospectively. Consequently we adjust previous year's numbers when the final versions become available. Normally these are very minor adjustments but this year we have had to make some more significant corrections to previous figures in line with new data and refinements from the data sources we use. To maintain consistency these have been backdated to 2006 which allows us to keep the comparison since EU25/27 was created (the commentary will highlight these as appropriate).

The main focus of the Finfish Study is whitefish including freshwater cultivated species like pangasius and tilapia. The fish industry is far more diverse than this and we are trying to recognise this by including data about shrimp, cephalopods, large and small pelagics as well as imported prepared products. This is an area in which

we would like to expand our commentary for future years as we compare the data. In total we now believe that our database covers 98.5 % of all the trade flow in fish across the EU.

Generally the global trends for fish supplies whether from wild-capture or aquaculture have been stabilising or increasing with certain key species now forming the backbone of international trade and processing investment.

The scale behind some of these is considerable and has unlocked substantial growth in the markets as investment in improving yields and efficiency fuels further growth and opportunity.

When aggregating the data it becomes apparent just how large and complex the fish trade is within the EU markets and how important the EU markets are in global trade context. It also shows that other regions and countries are potentially competitors for the same fish species and we must be mindful of maintaining access to these global supplies.

We continue to refine the accuracy of the data presented in particular the estimates for non-food use catches and also aquaculture numbers. For example this year we have made a 300,000 t change to non-food fish because of the changes to sandeel catches.

2.2 Key Finding From Statistical Analysis

After making the adjustments to conversion factors for tuna the restatement of numbers for previous years has changed quite significantly but the relativity stays the same.

For 2012 fish consumption in Europe appears to have fallen by nearly 4 % to a level that is the lowest we have seen since the formation of EU25/27.

We will look at the individual species in more detail in later chapters but the summation says that the EU is catching less, importing less but exporting slightly more.

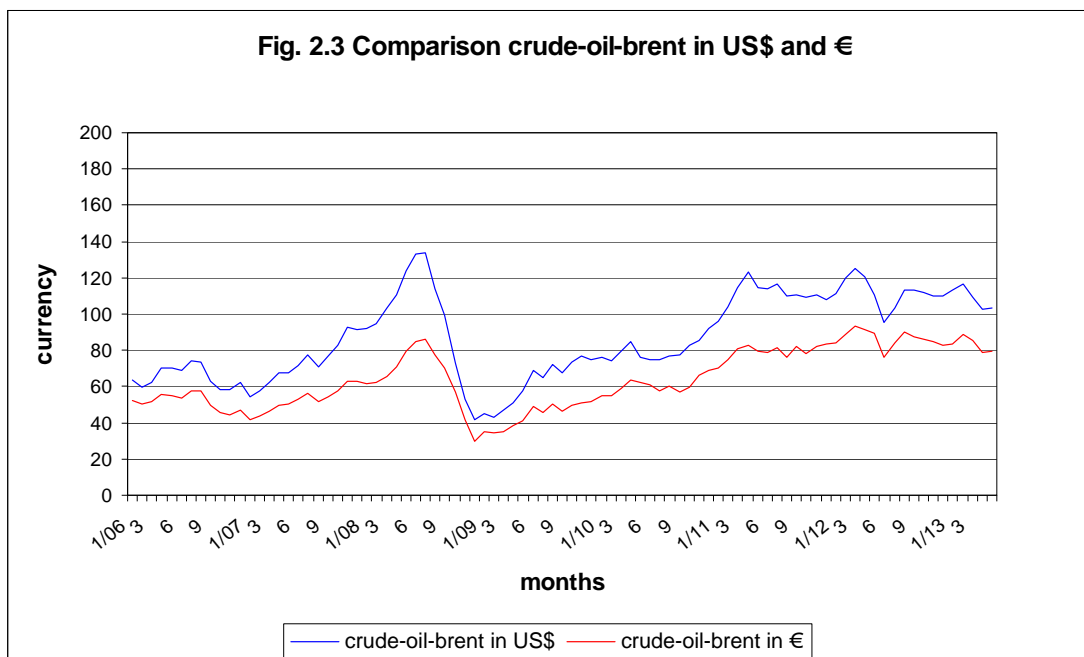
Reliance on imports remains stable just above 64 %.

2.3 Costs

During 2012 the \$/€ fluctuated in a range from 1.20-1.35 with the Euro at it's weakest in the middle third of the year which was the absolute reverse of the previous year.

Other key currencies to fish trading, notably the Japanese Yen remained strong throughout the year (although this has changed in 2013) and enabled these countries to manage costs for dollar traded species.

Oil prices stayed at an elevated level throughout 2012 (see fig. 2.3 next page) and continue to pose a real challenge to vessel operators. However, we are now in the third year of these consistently higher levels.



2.4 Regulatory Review

Summary

As foreshadowed in last year’s report, this has been a very busy year on the regulatory front for AIPCE-CEP and its members. Effective representation of our members’ interests has been at the forefront of our activities and we have been successful in ensuring that our key objectives have been met. On the reform of the Common Fisheries Policy we have played an active role in ensuring that the final outcome will bring about real change in EU fisheries management policy.

Of particular relevance to AIPCE-CEP members were the Commission’s original proposals for reform of the EU Common Organisation of the Market in Fishery Products (CMO) which would have added unnecessary cost to business and caused confusion for consumers. The final outcome of these discussions is reported in more detail in subsequent paragraphs.

EU IUU Regulations

The EU’s IUU regulation is now a firmly established feature of the international trading environment. At the end of 2012 the European Commission published a decision announcing that a number of countries (Belize, the Kingdom of Cambodia, the Republic of Fiji, the Republic of Guinea, the Republic of Panama, the Democratic Socialist Republic of Sri Lanka, the Togolese Republic and the Republic of Vanuatu) supplying the European Market did not have effective control measures in place to detect or deter IUU fishing.

This served as a formal notification to those countries that they were being considered as “non-cooperating third countries in fighting illegal, unreported and unregulated fishing”.

AIPCE-CEP remains fully supportive of the EU’s determination to stop IUU fish being supplied to the European market and will continue to work closely with Commission and member state officials to resolve any issues that may arise in order to safeguard the industry’s supply chains.

EU Control Regulation

Commission Regulation 404/2011 set out the detailed rules for applying the EU-Control Regulation 1224/2009. Within these provisions for fish originating in the EU AIPCE-CEP and its members believe that the requirements for traceability follow the normal “one up, one down” principle rather than for complete traceability to be available at every stage of the process. However this interpretation is not shared by all and is an example of how the implementation of new regulations can be difficult and confusing. AIPCE-CEP continues to work with the Commission and member states to ensure consistency of application.

Common Fisheries Policy/CMO Reform

The main Common Fisheries Policy reform negotiations have now been successfully concluded, decisions are still awaited on accompanying financial measures under the EMFF proposal. These are due to be considered by the European Parliament in October at which point it is hoped that the package as a whole will be adopted for entry into force on 1st January 2014.

The aim of the reformed policy is to end overfishing and make fishing sustainable environmentally, economically and socially. The reforms aim to support sustainable growth of the fishing sector, create job opportunities in coastal areas and ultimately provide EU citizens with a healthy and sustainable supply of fish.

Of particular interest to AIPCE-CEP members is the provision for a Markets Advisory Council. This had been a key objective for the processing industry which had been pressing strongly for a formal framework to consider horizontal supply chain issues that would not be adequately covered by the RACs and their successor regional management bodies. We will be working closely with the Commission to develop a suitable structure for this body.

The original Commission proposals for CMO reform failed to recognise that the EU market for seafood products is supplied through sophisticated global supply chains which bring together products from a wide range of sources in order to supply consumers with the products that they have come to expect. We fully support the need for meaningful consumer information but it must be proportionate and contribute to genuine consumer choice. The Commission’s proposals would have led to confusion and increased waste.

Through effective engagement with member states’ Council representatives, key MEPs, permanent representations and others, the final agreement addressed our concerns and we believe represents a satisfactory outcome for consumers and industry alike.

Once the new CMO regulation comes into force it will require more specific catch area information i.e. at least at FAO sub area level (rather than FAO area as at present) for fish caught in the Northeast Atlantic (FAO Fishing Area 27), the Mediterranean and Black Sea (FAO Fishing Area 37).

Providing information to consumers about gear type-category for wild capture fisheries will also become mandatory.

Tariff Regulation

As the figures in successive AIPCE-CEP studies have demonstrated, EU processors are heavily dependent on third country supplies to meet consumer demand. For many years the EU operated a system of open ended tariff suspensions for products of particular importance to the processing sector. These were supplemented by a number of autonomous tariff quotas (ATQs) which were subject to both time and quantitative limits. If adopted as originally proposed, the Commission's intention to replace this mixed system with a single one based solely on ATQs would have meant that industry would have lost the certainty that tariff quotas had historically provided.

Whilst it proved impossible to secure an agreement which would have retained the suspension system, we did achieve significant improvements both in terms of lower duties and/or increased volumes for certain products as well as a safeguard measure to ensure that adequate supplies of key raw materials would continue to be available to processors at competitive prices.

The current regime runs for three years from 1st January 2013 and AIPCE-CEP will continue to work actively with the Commission and member states to ensure that the supply of key raw materials is maintained.

Free Trade Agreements

At the time of writing, the EU is in active negotiations with several important trading partners with a view to concluding reciprocal free trade arrangements. AIPCE-CEP members hope that these agreements are balanced between their need for raw material and the sensitivity of certain products for the EU processing industry. We will continue to monitor progress closely and ensure that the potential benefits for EU are achieved.

Eco-labelling

In previous studies we have highlighted the development of independent certification across key fisheries around the world. The majority of these schemes have been adopted for use by processors, brands and retailers as a means to demonstrate their commitment and support towards sustainable practices in fisheries. We recognise that such schemes must be able to demonstrate proper rigour and process to maintain their credibility. We also believe that good public management of fishery resources is essential.

Within AIPCE-CEP we have a working group focused on sustainability and this has published our 'Expectations from Seafood Environmental Standards' on the AIPCE website (www.aipce-cep.org).

3. Methods of Back-calculation to Whole Live Fish Weight (WFE) Utilised for Imported Headed and Gutted Fish, Fillets and Portions

Eurostat data is for fishery products in their imported form. It does not estimate the amount of whole fish from which the fishery products are derived.

Since the 2009 Finfish Study AIPCE-CEP has adopted its own set of conversion factors based on actual processing yields gleaned from the experience of its members (see tab. 4.17). In doing this we are trying to more accurately reflect the differences between major processing methodologies and regions around the world

As a consequence of the many changes to CN codes affected in 2012 we have used the opportunity to review some of the conversion factors for certain species and formats, especially tuna (the most significant change was to prepared tuna [canned] where we adjusted this from 2.79 to 1.74 after a more extensive analysis by members of the AIPCE-CEP group with experience of processing the species) and prepared surimi.

Where we have adjusted conversion factors we have restated the numbers back to 2006 (i.e. the formation of EU25 and moving on to EU27) to keep comparisons valid.

We must reiterate that there is an element of approximation that comes from this process but we believe the factors now used are a far more accurate reflection of the reality of fish processing in today's global supply network.

It is also worth noting that the EU Market Observatory (EUMOFA) is now publishing trade data and has itself established conversion factors for all CN codes. In the majority of cases these match or are very similar to those used by AIPCE-CEP. However, there are some notable differences that we will investigate further after the publication of this year's study.

4. Import Supply Trends of Whitefish

This report covers the trade activity in fish products for the EU27 up to 2012. Across these member states there is a wide diversity of consumption in both quantity and species driven by long term tradition and more recent introductions of 'new' species or formats that have opened up the number of occasions when fish is eaten.

One of the key messages we deliver in this report is the dependence that the EU market has on imported materials for its processing sector. Since the formation of EU25/27 in 2006 this dependence as share of the market has hardly varied remaining within the range of 63 % +/-2 %. For 2012 we see this is at 64 % so no material change.

In absolute terms the sum of all imports (at WFE) has declined by 406,000 t (4.4 %) which is a reversal of the growth in 2011 (see table 4.1).

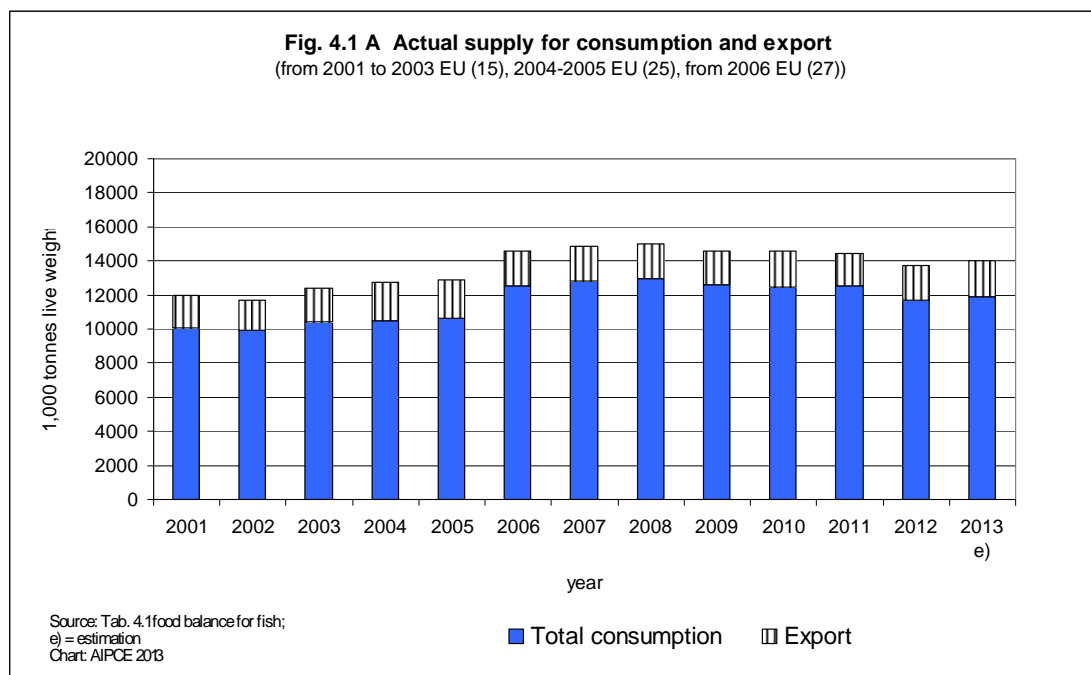
Traditionally we have used this Study to focus on the trade in the 7 key whitefish species that underpin the majority of member state markets consumer markets and in general provide the raw materials that undergo the most transformation within EU factories.

Previously amongst these whitefish species the reporting was exclusively about wild-capture species such as cod and Alaska-pollock but in recent years the advent of large scale aquaculture has seen the introduction and development of new species most notably pangasius. Consequently the markets have been able to increase the choices and ranges of products on offer and develop new and significant category growth.

It is not our intention to imply that of other categories of fish such as salmon, shellfish and tuna are not equally important and we hope to address these in more depth as a future development of this Study.

4.1 Total Fish Supply (all species)

After restating the calculations for previous years with the adjusted conversion factors we see a decline in total supply of 422,000 t to a level of 13.7 million t which is the lowest since EU27 was formed (see table 4.1).



This 13.7 million t of supply is broken down as follows:

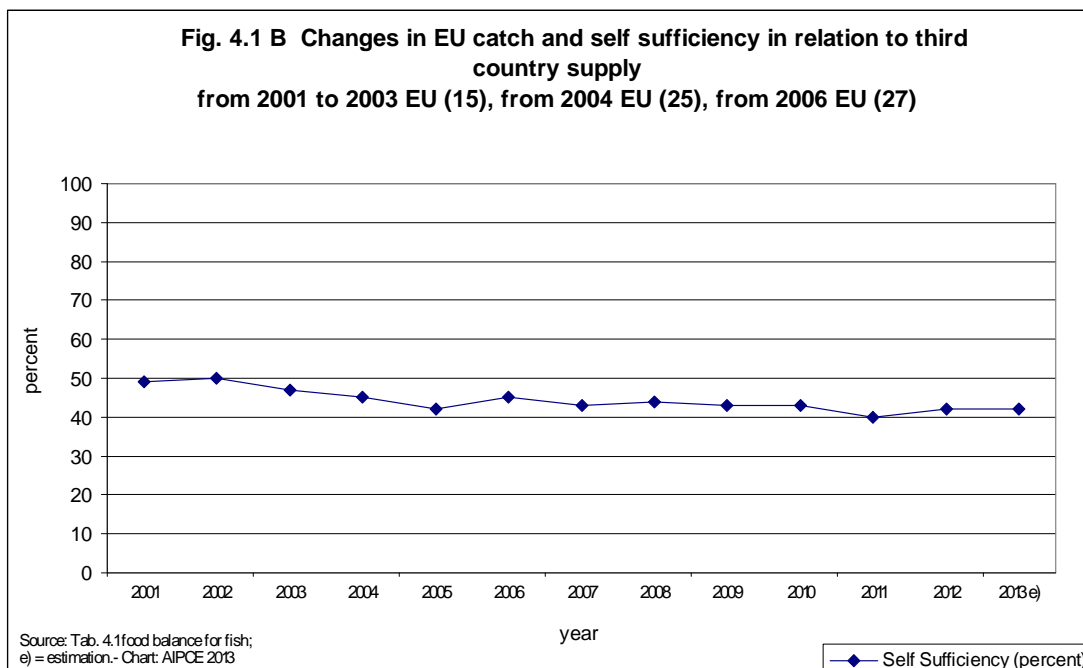
- EU national landings 4.3 million t less 700,000 t for non-direct food use gives a net 3.61 million t (which is almost identical to 2011) for direct human consumption.
- EU aquaculture generated 1.26 million t – a volume we think has barely changed for 3 years.

So EU domestic supply amounts to 4.87 million t which if entirely consumed within the EU would give a self-sufficiency level of 41.7 % as demonstrated in chart fig. 4.1 B (see next page).

In reality quite a large proportion of this material is exported. For 2012 our estimates show this to amount to 2.00 million t which is higher than 2011 by 2.3 % (see table 4.1).

Imported materials comprised of 8.815 million t a reduction of 406,000 t or 4.4 %.

This is representing 64.4 % of the total available supply of 13.7 million t which is down year on year by close to 1 % (at WFE). Since the extension of the EU to 27 member states this number has barely changed remaining in range of 63 % +/- 2 %.



When measuring against the total consumption of 11.69 million t the share of imported fish rises to 75.4 % (assuming none of the imports are reexported). Again it is worth repeating that this share has remained more or less at this figure since the EU27 came together.

Now we can break this down into the key species sectors supply helping us understand the dynamics:

- Wild-capture whitefish species down by 107,000 t (-3.7 %)
- Freshwater species (mainly aquaculture) down by 167,000 t (-23 %)
- Salmon up by 128,000 t (+14 %)
- Surimi base and products down by 17,000 t (-6 %)
- Tuna down 54,000 t (-4 %)
- Small pelagics down by 35,000 t (herring and mackerel) (- 2.5 %)
- Shrimp down by 92,000 t (-9 %)
- Cephalopods down also by 33,000 t (-7 %)

In a subsequent chapter there will be greater discussion about each of these.

Adding together all these items we see a decline of around 377,000 t which accounts for 89 % of the total change we estimate for all supply. This validates our inclusion for the statistics of the species beyond our original 'Whitefish Study' and reinforces the AIPCE-CEP voice as representative of a key and very large sector for EU food supply.

These changes represent the effect to total supply. Our dataset further analyses this to the split between EU caught/grown and import movements.

For EU 'Quota Species' there has been a decline of catches of 316,000 t or 12.2 %. Within this the reduction of sandeel is responsible for 325,000 t for which we have adjusted the non-food category so actually the rest of the complex shows increase.

Here the key messages about EU supply show that for each of the relevant human food sectors the changes are:

- Wild-capture whitefish* growth of 3,000 t (+1 %)
- Tuna no change
- Small pelagics (herring and mackerel) up by 28,000 t (+2.5 %)

**EU species included are cod, haddock, redfish, saithe & hake. Non-EU additions are Alaska-pollock and hoki.*

Coupled with the growth in export activity (2.3 %) this results in a slightly more favourable position for EU caught/grown fish to 35.6 % of total supply (up from 34.6 % last year).

When taken at per capita level (WFE) the total supply appears to have reduced by 1 kg to 27 kg.

Taken to consumption level this has dropped by 1 kg to 23.2 kg which appears to be the lowest figure since EU27. This number has shown volatility previously and may be subject to a statistical deviation so we should be careful in reading too much into a single year's data. More positively and early analysis of available 2013 data suggests this may be only a temporary reversal.

To repeat from earlier our data is based on Eurostat figures for trade flows. Whilst these are generally up to date with all member state submissions by the time of writing the study this is not always the case and we make estimates where there are data gaps. The setting up of the Market Observatory (EUMOFA) will hopefully provide us another data base for future comparison and may help in explaining some of the anomalies we see in the annual data trawl, something we can more fully utilise in next year's study. At the moment the new data base is lacking in time and full covering of the main data.

At a final level we also take the FAO Statistics and make correction for these where appropriate, However, these are not available until 2-3 years later (this year we are looking back at 2010 data) so we are careful when backdating these and considering anything meaningful in the commentary.

As a consequence of these reviews we have reduced our estimates for 2010 EU catches by 10,000 t and EU aquaculture by 42,000 t following the FAO Statistics.

However, for 2011 the adjustment to EU catches has been more dramatic as we have revised these downwards by 192,000 t based on some revised calculations of EU data.

4.2 Wild Captured Whitefish Supply

Total supply of wild-capture whitefish slipped back 107,000 t to 2.825 million t in 2012 more or less the average of the last 5 years (see tables 4.2 and 4.3).

Imports are by far the dominate supply to this category but have slipped back to 88.6 % due to them falling back by 110,000 t. Once again there was a very modest increase in the EU catch for the species we incorporate in this category.

Seeking to explain this change can be challenging as there are many factors at play but we would make the following observations:

- In the last two reports we have explained how the general trend and catches in global whitefish have been positive and this has helped create additional supply. When looking at last year's imports most of the change has occurred in one species, hake, where the catches of eastern South America did fall back quite substantially.
- Competition from other regions and countries with major populations was quite considerable in 2012.

In some cases these markets are finding their feet in whitefish products and the demand is not yet fully established so can ebb and flow (e.g. Brazil) according to prevailing economic conditions and the success of new products unproven in the respective markets. In the long term we must be mindful that the improvement of income and living standards in these countries will likely result in increased fish consumption and the competition for fish will intensify as the right products establish themselves in the markets.

Others are reacting to shortages of other species they traditionally consume and using the increased availability of whitefish to plug that gap (e.g. Africa for whole round fish) so the demand here is more unpredictable. However, the fact that wild-capture whitefish can compete and be successfully substituted in these markets reflects the same point above about increasing competition.

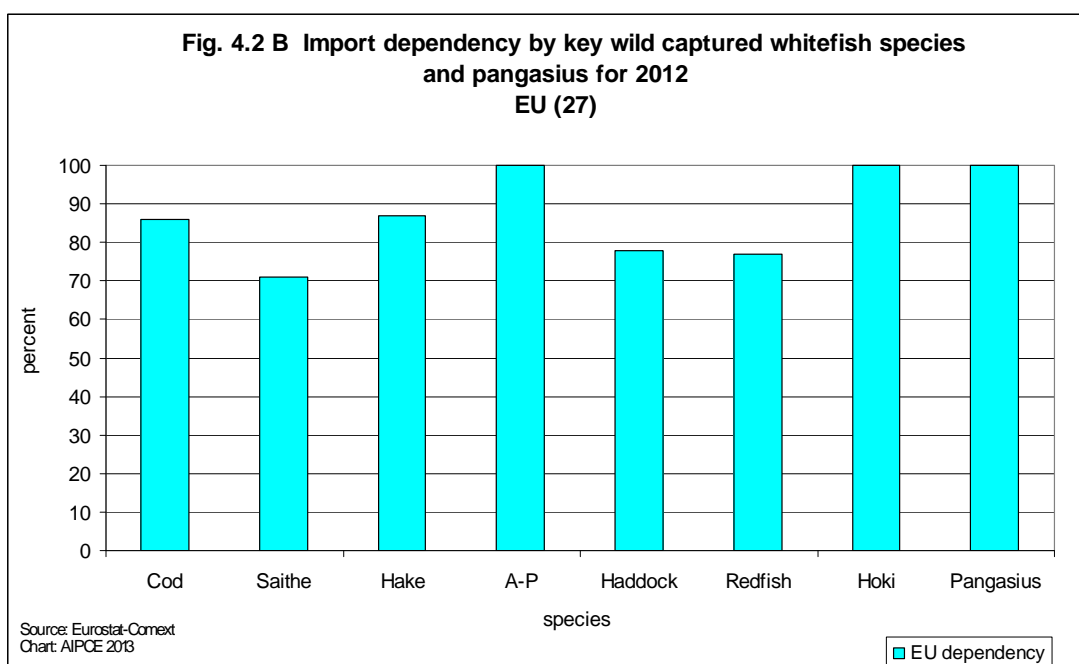
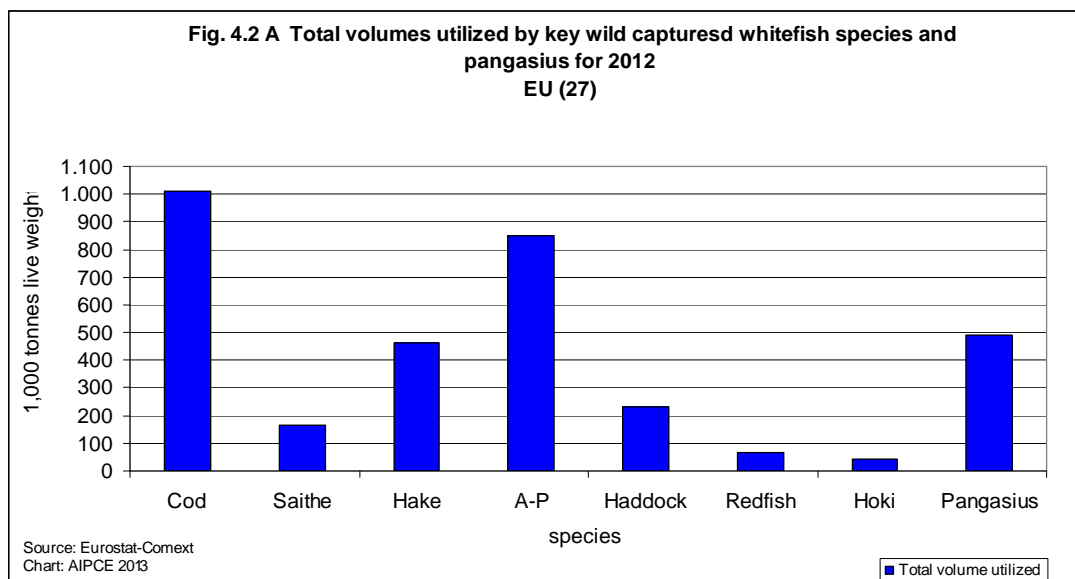
- There is another factor potentially contributing to this which revolves around the strategy many other populous regions and countries are developing towards food security. In some cases (e.g. Russia) there is clear intent to retain the catches in country for consumption or for further processing and value addition before export. There are also incentives to increase options for consumption for larger populations. For example we have seen China reducing import duties on some species, including whitefish, to stimulate the domestic markets.

With policies such as these that are intended to increase imports we must contrast this to some other regions where the bureaucratic burden is increasing on supplying countries and for importers. Making trade more difficult may result in less trade and choice. (AIPCE-CEP was pleased to see the adoption of a new tariff regulation for this year which took some of the concerns into account that the European processing industry has around the imbalance of availability in several key species).

- Using some nationally published data available to us we can observe that prices for key species and the major product formats started higher in 2012 but tended to trend slightly downwards as the year progressed. Coupled with the major quota announcements for key Atlantic species made mid-year this may have impacted buying and stocking decisions that will reflect in this year's figures.

The focus of wild-capture whitefish is actually on the 7 key species that form the vast majority of trade in this category. As we pointed out last year some of these are in formats that are universally accepted across the EU and form the industrial materials for certain key products (e.g. Alaska-pollock blocks) or they are traditionally skewed towards certain member states because of historical preference (e.g. haddock in the UK).

The graph below shows the relative importance of each of these (at WFE) with the addition of pangasius (separately discussed later in this chapter). The second graph shows the level of import dependency we have for each species.



Species Commentary:

- **Cod** retains the No 1 status of preferred whitefish species in the EU maintaining the same volume as last year at 1.01 million t.

EU catches grew by 6,000 t (4 %) which offers some encouragement but is still well short of the historical levels and the potential that the species could deliver with the implementation of successful management plans. Against quota the utilisation has deteriorated to 78 % compared to 85 % in 2011 which is disappointing.

Imports actually declined very slightly by 7,000 t. When we break down the categories for this activity we see growth of 11 % in whole frozen and fresh fillets (14 %) but some reduction in frozen fillets (-2 %), in the meat category, mainly mince blocks (-17 %) and salted/dried (-4 %). Perhaps this suggests that more processing of cod is taking place in the EU as the reliability of supply improves due to the large quota increases in the Barents Sea (Norway and Russia) announced in the middle of 2012 and the associated confidence in being able to access fish.

The mix profile of supplying countries showed some interesting changes. Russia was the biggest gainer growing by some 14 % split between frozen fillets and whole. Norway and Iceland were more or less stable, the Faroese losing 20 % of their volume. Perhaps the most important factor behind this is the structural alteration to the fishing fleets of Norway and Russia. In recent years the switch away from 'at sea' processing by Norway sees it land more frozen whole fish whilst the Russian sector has increased its capacity for 'at sea' filleting.

After several years of growth China appears to have reversed volumes by 12 % and its share has slipped back to 16 %. Some of this may be accounted for by species substitution as cod is still relatively more expensive than Alaska-pollock and haddock (at least in 2012). Another factor could be the effect of de-stocking due to the mid-year announcement of a 33 % quota increase in the Barents Sea (=250,000 t fish) that led the market to anticipate lower prices ahead. Therefore there may be some rebound in 2013.

However we look at the numbers the importance of cod processing in Europe is still evident. Importing 133,000 t of H&G (WFE) and 39,000 t of fresh whole fish is providing valuable work in Europe and supported by an EU catch of 144,000 t represents one of the core seafood materials for our industry.

Whilst EU landings share just under half of the whole fish sector the total self-sufficiency across all cod remains low at 14 %.

We should not see this in a negative context as the EU is still the biggest market for the cod species and we estimate accounts for around 70 % of all global consumption.

There is obviously room for expansion in the EU supply and with the efforts going into long term management and stock recovery we can be optimistic that this will happen. We should not lose sight of the fact that other depleted and pressured cod stocks have and are making substantial and sustained recoveries and that the overall availability of the species is improving dramatically. In the new tariff regulation the AIPCE-CEP requests for maintaining competitive access to imported Cod were recognised and we hope this continues.

There are many positive stories to be told about cod fisheries. For example today close to two thirds of Atlantic cod is independently certified as sustainable (MSC) and for Pacific cod this nearer four fifths (MSC and Alaska RFMCP). We need to ensure that these stories get exposure so we can rebuild a strong consumer base in the EU.

- **Alaska-pollock** has been more or less stable shrinking only by 1 %. This follows a surge in 2011 in response to the major upward adjustment of the USA quota which was not repeated last year.

2012 saw catches decline very slightly in the Bering Sea but we are towards the top end of the resource cycle, especially in the USA.

In our commentary last year we noted the change in imports between the key supplying countries. In particular we felt that the USA had not delivered all of the extra production from the 2011 quota increase and that there would be a catch up in 2012. The figures seem to bear this out as USA advanced by 11 % (38,000 t at WFE) and saw their share grow to 43 %. However, the effect of this levelled off in the second half of the year.

Russian volume fell back by 15 % possibly part displaced by US products but also probably due to increased competition for the use of Russian fish into other markets (e.g. whole round to Africa).

China also had reversal of 6 % (27,000 t WFE) despite a lowering of twice frozen block prices in the early part of the year. One of the consequences of this may be a contraction in processing capacity.

We also made comment last year about some unusual circumstances around the global trade in Alaska-pollock due to the twin disasters in Japan and the impact on surimi production. Whilst these effects are now overcome other factors continue to influence this species disproportionately to others. The long run of a strong Yen began to change at the end of 2012 and will affect the activity in 2013.

There has also been a long running process to reach MSC Certification for the Russian Alaska-pollock fishery that has not been a smooth progression but is now completed. Alaska-pollock fisheries are the biggest when it comes to wild-capture contribution to global supply used for human food and their products, notably fillet and mince blocks, are the key industrial material for many processing plants in Northern Europe. We were pleased that the EU recognised this in the tariff regulations and the concessionary allowances. For the considerable and long term investments made by the processing sector this was an important signal.

- **Saithe** is going through a phase in the resource cycle when catches and supplies are lower. In 2012 volumes slipped back by 12 % with EU catches down 10 % and imports 13 %.

After enjoying a run of 'premiumisation' some of that gloss has begun to come off the saithe prices and we are perhaps seeing it fall back into a more normal competitor set. Having said that saithe is still a popular choice for salting & drying due to its physical attributes and finds a market in the Caribbean, Brazil and Africa.

By sector in the EU there were declines in whole fresh (-12 %), whole frozen (-35 %) and frozen fillets (-14 %). Two sectors showed growth – fresh fillets up 64 % albeit a small category and 'meat' (mince blocks) where the increase in Faroese catches have been responsible for the gains.

The context of saithe supply is a little poorer with Norway and Iceland cutting quotas in 2012 but the catching has not been as easy as in recent years and not all the allocations has been taken the exception being the Faroes where a 20 % uplift occurred.

The EU catch also fell by 10 % (to 47,986 t) but against a quota cut of 13 % (to 53,451 t) resulting in slightly better quota utilisation of 89 % versus 87 % last year and continuing a positive trend since 2008.

Consequently EU catches maintained their share of market at 29 %. Our view is that the EU share of the global market has slipped back to nearer 50 % in 2012.

- **Redfish** is the smallest volume species in our whitefish category but it plays an important role in some member states notably Germany. Total market volume declined for 3rd year in a row and now sits around 66,000 t. EU quotas remained unchanged from 2011 but catches fell back again to the extent that only 52 % of the available quota was caught.

Imports also fell back by 16 % probably in part reflecting lower catches in Norway and Iceland fisheries.

EU catch accounted for 23 % of the market in 2012.

- **Haddock** volume grew by 4 % to reach a WFE of 233,000 t which makes it the highest figure in the history of the Finfish Study for this species.

As we reported last year the current cycle of global haddock quotas had reached a peak of around 400,000 t and we began to see this reversing albeit only with relatively small changes in Iceland and the Faroes. We must take note that this process has now accelerated with a major cut to the 2013 quota for the Barents Sea region (-118,000 t) that will have a dramatic impact when we report next year.

However focusing back on 2012 we see the EU is the biggest market for haddock with a share of around 60 %. With the improved availability of the last few years the price for haddock has been generally lower particularly against cod. This has helped demand remain strong in the traditional haddock markets (EU, specifically UK and Northeast America) but has opened the door to new entrants of which Russia has been a willing buyer (quite how this will play out for 2013 with the major quota reductions remains to be seen).

EU catches improved by 12.7 % to 52,200 t but the quota advanced by 26.1 % so disappointingly the utilisation was down to 78 % from 87 % last year (based on our preliminary figures).

Imports only grew by 2 % reflecting the lesser momentum of global quotas and the EU catch accounts for 22 % of the EU consumption.

By each format there was relatively change with whole fresh imports showing the biggest change at -6 % (but that is only 2,000 t of fish) perhaps because of the increase in EU supply but also offset by a slightly larger increase in whole frozen.

In the tariff regulation review we note that our requests to introduce some concessionary benefits on haddock were turned down. With the significant reduction in global quotas for 2013 (more than 100,000 t) the increase in EU quotas are only very partially addressing the shortfall that will be created and those that have a major dependency on the species may struggle.

- **Hake** saw the most significant decline of our wild-capture species set which can almost be entirely explained by change in availability from the South American fisheries where catch rates have been unsettled. At WFE the decline is 13 % dropping to 462,000 t. EU catches remained static at 62,000 t (+1 %) and the utilisation of quota was 81 % as last year.

Having said in last year's report that we thought hake was stabilising the statistics for 2012 have shown the opposite. Once again the imports of whole fresh has gone into reversal showing a 17 % drop which probably reflects more on the economic conditions of the Southern European markets that take this format.

The EU remains the most important market on the global stage for the collective hake species but this share has now slipped below 50 %. As EU catches have remained stable the domestic share has increased to 13 % which exceeds this measure against any year since EU27. Whether other markets in the world now prefer hake and become more attractive than the EU for suppliers remains to be seen but some signs are there.

- **Hoki** (New Zealand only as we do not yet analyse South American supply) has also lost ground in 2012 which is something of a surprise given the improvement in availability from New Zealand where a long term period of precautionary management is finally resulting in positive trends to quota and catching. Overall imports fell back by 15 % to 42,000 t WFE which reverses all the growth of 2011. This is still the second highest total since EU27 so reading too much into one year's trade statistics is not recommended.

The EU remains a key market for all hoki materials and accounts for 35 %+ of all consumption.

The sustainability credentials for NZ hoki are well established and have contributed to hoki becoming known as a 'name' species in the whitefish complex but it does compete against Alaska-pollock where the increase of availability may have caused a temporary setback for hoki.

- **Plaice** is not a species included in our wild-capture set but it is worth mentioning because it represents one of the few species and formats of wild fish where the EU is close to self-sufficiency.

Encouragingly the market grew by 6% to around 88,000 t and 93% of that came from EU caught fish. The recovery of biomass in the North Sea has been substantial and we now see a quota being set above 100,000 t making plaice one of the most important food fish in the EU quota species complex.

It may take some time for the market to catch up with this growth in availability as the increase in quota for 2012 was 12% and the catch only advanced by 6% resulting in utilisation of 81%.

Plaice sits in a competitive set of other flatfish for which we do not have analysis. Given the majority of plaice is sold in fillet format (i.e. not industrial blocks) it may be that this set could be broadened to include some of the farmed species as well such as pangasius and tilapia.

Whitefish Summary:

After the growth of market in 2011 it was disappointing for us to see a reversal of 4% in 2012. How much of this can be attributed to the ongoing economic challenges faced to varying degrees across all EU member states is not easy to establish.

As we have mentioned in several of the commentaries the recovery of stocks and consequently quotas is increasing availability of some familiar species quite markedly. In the short term this can create bursts of activity where that species gains favouritism over another for example due to price difference encouraging substitution. However as the general situation stabilises and improves in many of the key global whitefish species each of them find opportunity for growth and we can hope that rather than trying to just maintain our markets we have genuine scope for more substantial growth.

The involvement in EU caught fish in such growth is important and very welcome but we still must recognise that imports will contribute substantially. If we add together the total EU catch for the species we have made commentary on above (excluding plaice) this came to 322,000 t which is only 11% of the market we have described. It is in the interests of the processing industry which AIPCE-CEP represents to be able to have access to global fisheries that allow us to grow the market and increase consumer choice and confidence in the sector.

After some initial reservations and concerns with the proposals for the new tariff regulation introduced by the EU AIPCE-CEP was pleased to be involved in much dialogue with our member state representatives that listened to our concerns and helped us achieve a fair result that recognised the necessity for keeping the EU processing sector competitive not just internally but also on a global stage where other countries and regions have been developing policies to encourage consumption.

4.2.1 Principle Supplying Third Countries for Whitefish

Having consistently demonstrated the reliance on imported fish the other dimension we consider is the countries from which these supplies are coming. This is summarised for wild-capture whitefish in tab. 4.3 and then detailed in tab 4.12 and for cultivated fish in tab. 4.13 to 4.16.

We have touched on some of the reasons for change in the previous chapter but here we go into more discussions where these issues are to do with more general changes.

To reiterate the point we made in last year's Study a major feature of the seafood industry for the last 10-15 years has been the relocation of primary processing away from catching nations to third countries. The initial advantages of yield, hand-cutting, multiple choices for product formats have led to the establishment of substantial infrastructure in some of these countries that has in turned fuelled even further switching. Perhaps the most important region has been North Eastern China (Liaoning and Shandong provinces) but smaller hubs have developed in other countries, mainly in Asia. Industry in catching regions and closer to the markets has not stood still and are developing technology and processing techniques that are better matching the utilisation rates of hand-cutting.

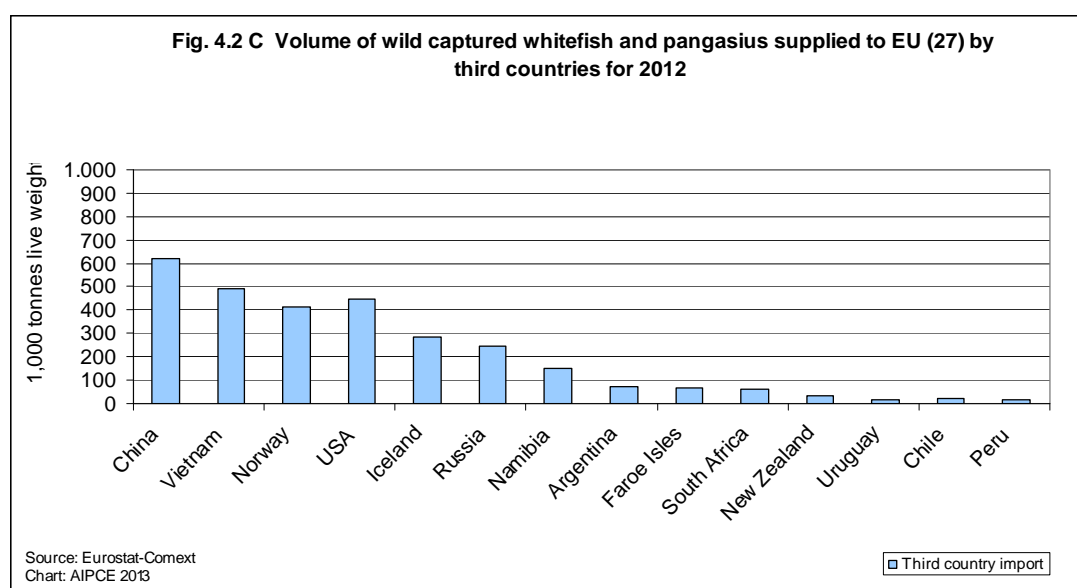
Of course where fish is landed mainly fresh then supplying the local market is far more effective in both quality and efficiency terms. As this is the case for the majority of fisheries within EU borders then most of these are processed to their primary stage locally. Additionally for some niche markets and raw materials (e.g. line caught

fish) the ability to respond to demanding service requirements is helping support or in some instances create further local EU based opportunities.

Where we are able to recognise yield differences by region we have tried to reflect this within our calculations back to Whole Fish Equivalent (WFE) but there will always be room for error as we use the CN code for the basis of quantity. Unfortunately these do not make differentiation between final formats e.g. skin on v. skin off but we believe it is worth trying to allow for these differences as they can be quite material.

Finally because of this global movement of fish it is difficult to use the statistical formats available to us when we prepare this Study to trace the fish back to country of catch. Of course in day to day transactions the industry is very adept at this because of the sophistication of bespoke traceability systems used by individual companies to comply with legislation and also to provide complete re-assurances to its customers and consumers.

Fig. 4.2 C below shows the ranking of each country for whitefish at WFE:



- **China** is still the largest supplying nation but 2012 saw a significant reduction by our WFE measure to 620,000 t (-8.3 %) which represents 24.8 % of wild-capture whitefish imports (in addition there is around 40,000 t of cultivated whitefish, tilapia mainly, that comes to the EU).

Except for a very minor fraction this wild-capture fish originates in other countries.

Every species in our complex saw reduction in volume from China in 2012.

China is facing challenges to its fish processing industry that may begin to erode its overall capacity. Attracting labour to the fish processing sector is becoming harder and the advantage of processing by hand, whilst still crucial to many products, is being eroded by the development of improved technology and efficiencies in EU factories for certain formats.

Even with this pressure it will probably be sometime before China loses its pre-eminence in fish processing because of the strong infrastructure and investment in the sector.

There is also much debate about when (rather than if) China will become a consumer of the same species we eat so much of in the EU. There is no doubt that the influence of China is being felt in some types of fish, particularly high end shellfish and whole fish where the head is still attached and at values beyond other markets.

For whitefish species the impact so far has been quite limited although we are seeing some more day to day uses as the fast-food restaurant industry expands rapidly. This rate of expansion counts new openings in days - if not hours - and may provide significant competition in future. Moves to reduce the duty on certain imported raw materials, including some familiar whitefish species, may accelerate this trend.

- **Vietnam** is suffering significant setbacks in the pangasius industry that have hugely reduced volumes in 2012 adding to the already significant reduction of 2011. Compared to 2010 we now estimate that the trade in this species has shrunk by 30 % in volume.

There are several contributory factors such as:

- production costs have been challenging;
 - competitor sets to pangasius have seen recovery in quotas and scope for re-asserting themselves in the market;
 - resistance to ready acceptance of the species in some markets, especially in some EU member states, that have inhibited the ability of pangasius to establish itself.
- **Norway** slipped back slightly in 2012 seeing the whitefish volumes shrink by 3 %. Saithe was the principle contributor to this decline and only haddock saw any increase. Altogether Norway contributes around 17 % of all wild-capture whitefish imports but the proportion of this that requires further processing is increasing. This is due to the changing profile of the Norwegian freezing fleet that has moved away from 'at sea' fillet processing to producing H&G (headed and gutted fish) that can then be processed elsewhere.

Several EU member states have factories that have benefited from this additional and reliable availability particularly in Southern Europe for salting and Northern Europe for refresh.

In the middle of 2012 the announcement about 2013 quotas in the Barents Sea was extremely positive for cod with a 33 % increase to 1 million t (of which Norway has greater than 40 % share). This had some impact on buying patterns in the latter half of 2012 in the anticipation of improving availability and adjusting the market to the opportunity.

Conversely other important species had quota cuts, notably haddock at 37 %, but the aggregate of the whitefish catch is much bigger in 2013 and will probably enhance Norway's share in the future.

It is of note that the Atlantic cod biomass in the Barents Sea which is a resource primarily shared between Norway and Russia is at the highest level since the 1940's. Although not yet to the same extent improvements are seen also in other North Atlantic cod fisheries and we are potentially facing a challenge to match this enhancement to supply with an equal increase to demand.

Norway is a vitally important partner for the EU fish processing industry as it is the largest when all species are taken into account. Farmed salmon sales powered ahead in 2012 growing by 19 %. Pelagics saw some shrinkage (herring and mackerel) but the accumulated activity for Norway accounts for more than 1.5 million t WFE into the EU.

- **Iceland** reduced by 6 % at WFE reflecting changes in saithe and redfish. Whilst saithe catches did not reduce those of redfish did and probably explain the adjustment, haddock also saw shrinkage of 2,000 t probably caused by lower catches in 2012.

Cod also fell back nominally by 4,000 t WFE. Within the mix of commodity types fresh fillets actually expanded by 19 % reflecting the strategic position Iceland has put itself in for this type of trade.

However, both salted cod (-5 %) and frozen fillets (-12 %) reduced. Whether this is a consequence of competition from processing in the EU in the case of salted fish or other nations for frozen fillets is unclear.

The EU region is the most important trading area for products from Iceland. In broad terms we take around 80 % of their cod, 60 % of the haddock and redfish and 70 % of the saithe.

Icelandic whitefish fisheries are undergoing growth at the moment as the long term objective for meeting more robust management targets appears to be paying off. So it should be expected that Iceland will be offering and selling more fish to the EU in coming years.

- **USA** expanded volume at WFE by 8 % to 448,000 t. The key driver was Alaska-pollock which went up by 11 % and as we discussed in our species commentary in the previous chapter this appeared to be caused by the legacy of 2011 product (generated after the large quota increase that year) arriving in the EU in the early part of 2012. The key products affected were fillets and mince blocks.

Surimi was largely unchanged (-3 %) as the stock carryover from 2011 was not affected in the same way as blocks.

Quotas for Alaska-pollock were largely unchanged in 2012 and 2013 so it would seem likely that volumes will stabilise. However the sustainability credentials of US Alaska-pollock may encourage further growth.

It is also worth observing how the changes to capacity in China may affect this species.

The other main whitefish species from USA are Pacific cod and Productus hake which both saw some contraction in 2012 by 2 % and 8 % respectively. The Pacific cod quota is stable in Alaska so the slight shrinkage here probably reflects the competition from Atlantic cod that can be utilised for salting. For hake the change is as a consequence of a quota cut (which has been reversed in 2013).

- **Russia** continued to build on last year's growth with whitefish volume up 5 % to 243,000 t.

There are three contributors to this change:

Cod whole frozen is up by 36 % (9,000 t) which may be due to EU processors in both salting and frozen increasing their volumes. The increasing availability and stability in this species is helping justify investment in both production and markets that will improve efficiency and improve the competitiveness of EU processing.

Cod frozen fillets are also up 25 % to 56,000 t WFE. With the change to the fleet capabilities to include 'at sea' filleting Russian catchers are taking more of this market. This may simply be displacement as this category does not appear to be growing overall.

Saithe frozen fillets increased for the same reason – the absolute increase not that significant at 1,000 t WFE but a new sector for Russia.

As we mentioned last year Russia seems to have become a major market buyer in whole frozen cod and haddock (H&G) over the last 3-4 years. After initial views that their activity was only significant when prices were low it is the case now that for these two whitefish species and several other key commodities (e.g. farmed salmon) Russia is becoming a major consumer at price levels matching or even exceeding those of traditional markets. This follows a strategy of encouragement by the Russian government to retain domestic catches for local consumption and also to review inward tariff rates on some commodities to more favourable levels.

However, the increase in quotas for cod in the Barents Sea are considerable and the rate of market growth in Russia may not yet be matching the supply growth but we need to be mindful of the key role Russia has played in EU supplies and how this could be affected in the future by these policies.

- **Other nations** were commented about in the previous chapter. In general the South American region had a less favourable time with their hake and hoki fisheries albeit there has been some improvement in the utilisation of quotas.

New Zealand's hoki also went backwards in market share in 2012 despite one of its best recent years in fishing.

It is too early to read anything into these changes as trends based on one year's statistics especially where the fishery activity may be temporarily affected.

4.2.2 Importance of Semi-Prepared Fish Imports

In our definition these are fish materials that have been through a primary processing stage such as filleting but are then used as a raw material for added value in the EU processing sector. The most important of these are industrial blocks used for consumer items such as fish sticks and salted & dried material.

As can be seen from fig. 4.2 D these semi-prepared products represent 2.04 million t of the imported volumes (82 %) but their volume has declined by 5.1 % since 2011 which is a slightly greater rate of reduction than the whole category. We try to explain this below by looking at each of the key formats and the interaction between them.

Fig. 4.2 D An analysis of the volume of unprocessed and processed important whitefish species imported into EU from third countries for 2012 (tonnes live weight)

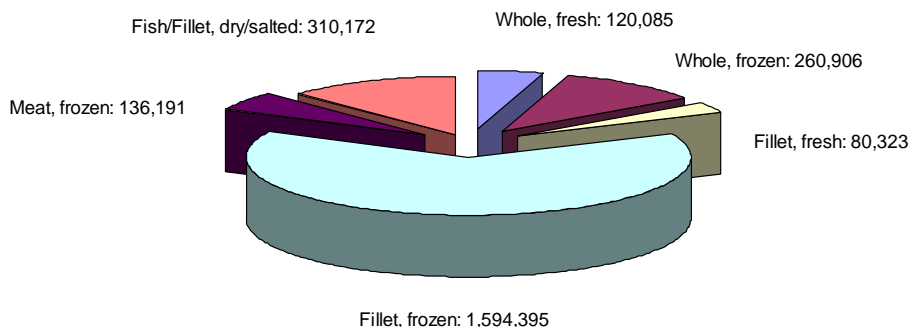


Chart: AIPCE 2013

- Whole fresh continues a trend of decline falling 10 % to 120,000 t. The most likely explanation it is more relevant that the catching nation is trying to maintain the primary stage of processing (which is usually the least labour intensive and easy to manage) in their domestic economy thereby gaining some advantage from their own fisheries beyond the base value of fishing. Certainly we have seen disincentive when political policy sets conversion factors and quota allocations to favour vessels and operators that land the fresh fish locally and provide security to local communities and employment that would easily be lost by transferring those efforts overseas.
- To support the above argument is the growth in fresh fillet imports of 18 % to 80,000 t WFE which counters almost exactly the decline mentioned above for whole fresh. In particular this is noticed for imports from Iceland and the Faroes whose economies are so dependent on fishery based activity.

Investment by logistics companies has resulted in improvements to frequency and reliability of services to major EU fresh fish markets such as UK and France that allow this fish to reach the retail chain in peak condition and with maximum shelf-life duration.

- Whole frozen remains unchanged from 2011 at 261,000 t. Within this there is positive change for cod of 11 % which is likely due to more ready availability of fish from the Barents Sea a trend set to continue into 2013 and 2014.

It also probably reflects that more processing for the salted market is now taking place within the EU (as discussed in the previous chapters). Additionally it may be that the improved availability is encouraging investment that improves efficiency in certain key products that can be repatriated from processing in Asia.

Haddock has also seen a similar uplift which reflects the high quotas of 2012, something we would now expect to reverse as the cycle of lower quota levels kicks in for the East Atlantic.

Hake imports in all of these categories fell in 2012 due to the issues with catches mentioned previously and also probably due to the continuing economic circumstances in the southern European markets where this species is the most popular.

- The Frozen fillet format represents the most important for the European processing sector as this includes industrial blocks which for many factories in Northern Europe form the backbone of their operations.

Volumes overall declined by 6% to 1.59 million t. The key drivers have been the fisheries where catch rates have been poorer notably redfish in NE Atlantic and Hakes from South America so these should recover as the fisheries stabilise.

For the other key species such as cod and pollock the changes are only minor (-2 %) and seem to reflect the reasons outlined in our earlier commentary - such as destocking in anticipation of future supply developments e.g. major improvement for Atlantic cod quotas for 2013.

This could have been exacerbated by the addition of new secondary processing capacity into the Northern European sector that has intensified competition but not necessarily created increased consumption resulting in greater uncertainty in buying decisions for key items such as Alaska-pollock blocks.

The effect of any destocking should be a one-off and not repeated in 2013.

- Salted and dried product went down by 4% to 310,000 t. This is still a hugely important sector for cod and shows remarkable resilience even in the face of tough economic conditions in the Southern European markets that dominate in this trade. With the problems such economic tightening has caused for credit availability there is bound to be some element of reduced stocking that has contributed to this decline but on the other hand the additional import of whole frozen cod may be contributing to this sector processing more products locally.
- Freshwater species have seen the biggest falling away all attributable to pangasius imports reducing by 20%. What is not clear is where, or if, this loss of volume has been replaced by other whitefish species. Notably nearly all pangasius is imported in the form of IQF fillets so it's competitor set probably does not directly include Alaska-pollock or hake where blocks are the major format. It seems unlikely that higher value species such as cod or haddock are taking up this slack but species where IQF fillets are the major presentational format could be benefiting.

4.3 Total Supply of Surimi Base

Surimi base is the insoluble protein of minced fish derived from a number of species. The preparation is in a frozen industrial block form and is extremely versatile as a raw material and can make many added value presentations the most common of which in the EU are crabsticks and the like. Most of the final products are sold from the chilled cabinets of retailers.

EU production of surimi base is very small - less than 4,000 t - all of which comes out the Northern Blue Whiting fishery. This represents less than 10 % of the overall supply and current capacity is a limitation to future growth regardless of quota availability.

However, there are some very significant secondary processing operations in the EU that use surimi base as their raw material and in recent years there has been considerable consolidation in the sector. The largest consumer markets are France (circa 60,000 t of finished product), Spain (25-30,000 t) and Italy (circa 20,000 t).

In the immediate aftermath of the economic crisis of 2008 the demand for surimi products slumped and the industry suffered several casualties. However up to 2011 the market had made up about half of this lost ground and is now more viable.

2012 started well with the growth rates seeming to sustain from 2011 (i. e. double digit) but then from mid-year there was a sharp slowdown which resulted in the whole year being more or less equal to 2011.

The principle cause of the abrupt change is likely attributed to the following:

- In the first half of the year surimi production increased in the USA after a poor performance in 2011 which required a catch up on existing contracts.
- The price for surimi rose in \$ terms as the main global player, Japan, had an extremely strong currency at this time. The euro was also quite strong hovering around the 1.30-1.35/\$ range.
- Negotiations for the second season production from the US coincided with a sharp deterioration of the Euro/\$ exchange rate which moved down to 1.20-1.25 and the processors found themselves facing higher raw material prices and the challenge of to pass this onto the consumer market at that time.
- Demand from Japan remained strong during this period although it subsequently dropped off. However, Eastern European markets such as Ukraine and Belarus became very active and helped underpin demand.
- Supplies from tropical species were OK but not prolific and prices held firm. Competition for this material was also stronger for domestic Asian demand, especially China, and from the aforementioned eastern European countries.

All in all this limited the scope for growth in the sector in 2012 but the view is that the underlying development in the market should be positive, It is certainly a market where innovation can help and with the consolidation the processors are better resourced to exploit this. Given the versatility of surimi base it can meet all tiers of the fish market from high end products to very good value offerings.

AIPCE was pleased with the final outcome of the tariff regulation that recognised the importance of surimi base by retaining the concessionary status and allowed for reasonable growth in the market over the next three years.

4.4 Total Supply of Surimi Seafood Preparations

Here the news has been for further shrinkage in the market which seems to be the long term trend. Last year's reduction of 13 % was the sharpest since 2010 since when we estimate a total drop of 22 %.

We can assume that the exchange rate change in the middle of 2012 contributed to this but no doubt the long term trend is primarily caused by the capacity now available across the EU to manufacture consumer products based on surimi. This may well be of limited concern to the suppliers of these finished products in Asia (i. e. in China and Thailand) where rapid growth in their local markets is occupying the factories more and more.

Within the EU regulatory review the GSP arrangements of several countries that are significant in surimi processing are affected. Depending on the final outcome of these changes and whether any Free Trade Agreements are concluded instead it seems

that the scope for further expansion of EU processing is realistic. There is no doubt EU processors find it easier to match European tastes and preferences in the ever shortening time frame these are demanded.

4.5 Total Supply of Freshwater Fish

We have already commented on some of the changes that have happened in this sector but below are the cumulative impacts across all the species.

This is the third year that we have had separate statistics for the three key species and this is helping us understand more of the supply dynamics.

The key observation from the figures is that the overall supply of freshwater whitefish is down dramatically with an accumulated 661,000 t compared to 830,000 t in 2011, a fall of 20 %. These are our more detailed comments:

- **Pangasius** is the predominant change with 125,000 t WFE less. We have discussed some of the reasons earlier but it is not just the EU that has suffered this decline. However, it has been more sharply felt in this market and the EU share of trade in this species we now estimate to be 24 % substantially down from its peak of >40 % in 2009.

What is not apparent to us just yet is which species, if any, are picking up this loss of volume. Pangasius has not had universal acceptance across EU member states but where it is used there may be different preferences for alternatives.

Of course Vietnam is saying it would like to address this reversal and stabilise and then re-build some of the lost demand. This does not yet appear to be happening but we wait and see.

- **Nile Perch** achieved 7 % growth in 2012 due to improved volumes from Uganda. This still appears to be some way off the peaks seen before 2010. The majority of the volume is supplied fresh (>70 %) and volume has remained stable over the last 3 years. Frozen fillets showed recovery in 2012 but are not yet back to the levels of 2010.
- **Tilapia** appears to have reduced again by 16 % largely due to lower supply from China. The EU is a very minor player in the global Tilapia market at around 1 % of the total.

5. Import Supply Trends of Non-Whitefish Species

As said in our introduction to this report we have historically focused on whitefish species in the Finfish Study because these have provided the principal raw material base for members of AIPCE-CEP. However, the competitor set for fish is much broader and from a consumer point of view the ability to interchange between species has never been greater.

Within this choice the wild-capture is still a major contributor especially in the pelagic sector. For large pelagics such as tuna the relationship between the EU and other countries/regions is quite complex but provides substantial employment and fishing activity for EU vessels and processors.

For smaller pelagics such as herring and mackerel these form quite large parts of the tonnages caught in the EU.

The other key change in the non-whitefish supply has been the escalation of aquaculture that is creating ever increasing opportunity and is underpinning certain key markets and investments across the EU.

Farmed salmon is now a huge item in the EU and our calculations suggest that imports are very close to the 1 million t threshold at live weight. This product has become the category driver for Chilled fish sales in many EU markets.

Warm water prawns (*Penaeus* spp.) are now also very significant in western EU markets.

The whole category of shellfish and cephalopods has been very substantial across the EU for many years but is dominated by imported product.

Below are some brief commentaries about each of these sectors.

5.1 Total Supply of Salmon (Farmed and Wild)

The rise of salmon, especially farmed Atlantic was considerable in 2012 with imports increasing by 16 % using our measure at WFE. When adding in the volume grown within the EU salmon now appears to be the largest single 'finfish' species at live weight having surpassed both cod and tuna.

By far the vast majority of salmon is sold in fresh distribution and has become the key category driver for that sector of the retail and food service trade across Europe.

In last year's study we highlighted that the lower prices in 2011 had helped to improve the growth rate and clearly this continued into 2012. In fact prices throughout 2012 stay more or less constant and this enabled farmed Atlantic salmon to feature again in promotional and campaign strategies. In the very latter part of the year and continuing into 2013 Farmed salmon prices have been rising again it remains to be seen how much impact these will have on volumes.

The biggest contributor to imports is Norway and of course it is also the largest grower of Atlantic salmon. Norwegian share of the farmed imports is around 90 % but we also saw growth from Faroes (+14 %) and Chile (+33 %) on the back of additional harvesting in those regions.

In contrast the supply for wild Pacific salmon mainly from Alaska or via processing in China had a much more difficult year falling back by 20 %.

The harvests in the North Pacific of both USA and Russia were not up to forecasted expectation last year and for certain key product sectors competition to secure raw material intensified. In particular this appears to have affected smoked wild salmon products where frozen H&G is brought to Europe and then prepared locally. This supply has reduced by 35 % reflecting these tricky market conditions.

In some product categories it will have been possible to substitute farmed Atlantic salmon but for others this is not an option so demand has had to be cut back – the most important of these being canned products.

2013 will be better for harvests of wild salmon but there are several species involved and it may not be a uniform result.

Fig. 5.1 A An analysis of the volume (1,000 tonnes) of unprocessed and processed salmon imported into EU from third countries for 2012

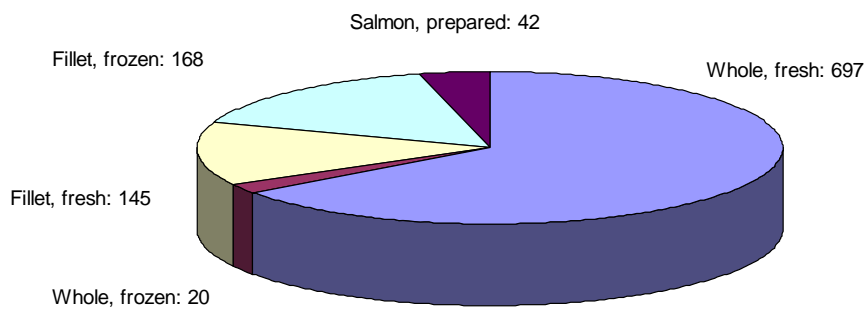


Chart: AIPCE 2013

Fig. 5.1 B An analysis of the volume (tonnes) of frozen salmon fillet import by country into EU for 2012

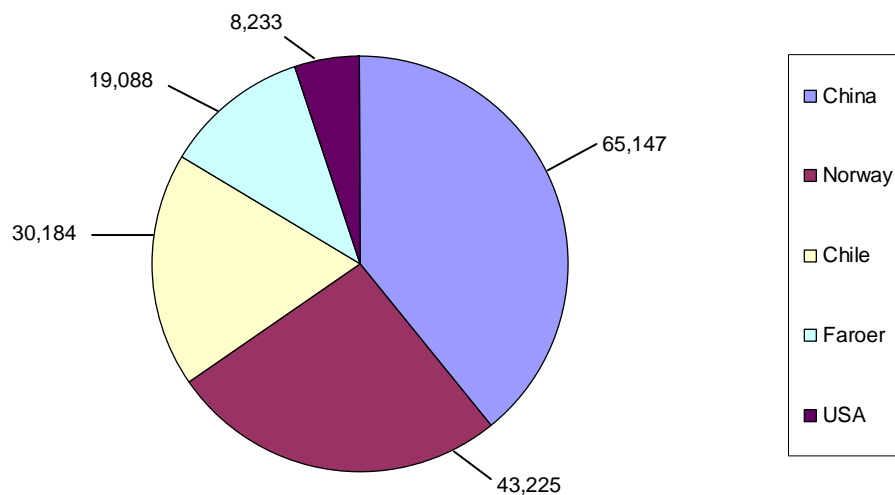


Chart: AIPCE 2013

5.2 Total Supply of Tuna

This is the fourth year we have included the statistics for tuna in our Study (tab. 5.2) and we have reviewed all the conversion factor we have been using after better input from AIPCE-CEP members. In particular the change to the CF for canned tuna was most notable reducing to 1.74 after this broader input (we have backdated this to 2009 to be able to keep our year on year comparisons valid).

For 2012 we show a slight decline in the market by 4 %. Overall we estimate that the EU is consuming a little over 25 % of the aggregated global supply of tuna species.

Imported canned products represent about half of the volume at WFE. A significant part of this is caught by EU registered vessels that land the tuna for preparation and canning in local processing facilities in distant water fisheries (e. g. Indian Ocean) before the products are exported to the EU.

There is also a large canning industry based in the EU (mainly Spain and Italy) that is importing whole frozen tunas and frozen fillets (loins) of tuna as their raw material. The importance of this sector is considerable in certain locales and we were pleased to see some recognition of this with an addition of a preferred duty status under the Autonomous Tariff Quota (ATQ) system for a part of the raw materials imported for use in this sector.

A small proportion of imports are fresh loins and fillets (circa 5 % of the total) that are used to service a premium sector for retail counters and restaurants across the EU.

5.3 Total Supply of Herring and Mackerel

Small pelagics are recent additions to our statistics pack but they represent considerable volume of live weight fish.

The popularity for consuming these species in more EU member states has been growing in recent years following well documented research explaining the specific health benefits that can be gained from eating these species alongside whitefish.

We estimate the herring market to have grown by 5 % with EU domestic catches increasing by 24 % and now taking a two thirds share of the supply. Imports have shrunk by 19 %.

The EU quota was increased by 23 % and utilisation has also improved to 85.3 % (from 83.8 % in 2011) although this is not uniform across all fishing regions. Within the herring complex the North Sea area seems to be in quite good shape and quota was increased for 2013 but other areas had more mixed recommendations.

For mackerel we estimate that the overall supply has slipped back by 18 % mainly as a consequence of the lower catches in the EU. The reasons behind this are contentious and well documented elsewhere and we will not make comment about the specifics of those issues in this Study.

5.4 Total Supply of Shrimp/Prawns

Last year was the first time we had included any data about the shrimp trade flows in the EU but as can be seen in tab. 5.5 the sector is still quite large accounting for nearly 900,000 t of shrimp at WFE.

Our calculations suggest the market has reduced by 9 % in 2012.

This reduction appears to be mainly in warm water species where supply problems were beginning to hit several of the key growing regions during 2012 a trend that has become more widespread in 2013. A key cause of these problems was the occurrence of disease outbreaks in several important shrimp farming regions. Once established such outbreaks affect supplies extremely quickly but take time to overcome.

This has driven prices up considerably for warm water prawns across the globe.

Coldwater prawns are wild caught and here we too see a market decline of 8 % principally with reduced supply from Greenland and Iceland. The prices in this commodity have also been rising on the back of weaker catches and fewer active processing operations.

In the new tariff regulation we were pleased to see the Commission respond to our requests to provide improved duty concessions for both coldwater and warm water

prawns for the product formats that require considerable added processing in the EU and have created significant investments and employment opportunities in several member states. We consider this was a very sensible step.

5.5 Total Supply of Cephalopods

General imports and trade of fresh or chilled cephalopods are negligible, therefore the analysis focuses on frozen products (see tab. 5.6). Cephalopods are very important to Mediterranean countries, notably Spain and Italy and, to a lesser extent, Greece and Portugal.

Among the different groups to be analyzed it is very relevant for the processing industry to distinguish squid (*Loligo* spp) from "pota" (*Illex* spp, *Ommastrephes*, *Notodarus* spp, *Todarodes* spp.) and from "potón" (*Dodisicus* spp). The anatomical differences of these groups significantly determine the way in which these products are processed.

- **Loligo:** The major sources of loligo are the Falkland Islands' fishing waters (*Loligo patagónico*), India (*Loligo duvauceli*), Thailand, China (*Loligo chinensis*), the USA (*Loligo opalescens* and *Loligo pelaeii*) Vietnam and South Africa (*Loligo reynaudi*).

The EU supply of 2012 was slightly higher than that of the previous year, mainly due to the higher catches of *Loligo patagonico* in Falkland Islands' fishing waters: the imports increased from 20,891 t in 2011 to 38,240 t in 2012.

In the European market, Spain's imports of loligo increased almost 14 % in 2012 (91,132 t), whereas Italy's purchases decreased 13 %: around 65,134 t compared to 73,451 t in 2011.

- **Pota:** It is important to distinguish between raw material and processed product. In this respect, statistics and EU tariff codes do not make any distinction between the "pod of squid" (body of the cephalopod headless and without tentacles, but with skin, fins and the offcuts of the viscera) from the "tube", which is the pod without skin and fins. This is very relevant information to operators which should be reflected in statistics, as the import of the whole animal or the pod of squid represent a higher added value to European industry.

The major sources of pota for the EU are Argentina (*Illex Argentinus*) and China (*Illex Argentinus* and *Todarodes pacificus*). Both countries accounted for 74 % (Spain 58 % and Italy 16 %) of total imports of pota in the EU in 2011.

Spain is the EU's largest importer of pota, notably of *Todarodes pacificus* from China and *Illex Argentinus* from the Falkland Islands' fishing waters (32 %) and Argentina (68 %). As for species, re-exports are negligible since all the raw material is processed in that country. In the case of Italy, there are no re-exports of these species.

China's exports to Europe include mainly products processed on land, such as rings and tube and some pod of squid from jiggers which fish in joint ventures between companies of both countries or in international waters. Argentina exports mainly whole pota and pod.

Landings of pota in Argentina, the major source of *Illex Argentinus*, reached 94,720 t in 2012 (+27.5 %).

- **Poton:** (*Dodisicus gigas* - giant squid). Peru is by far the major supplier of *Dodisicus gigas* - giant squid for the European market, followed by Chile.

Imports declined slightly in 2012 (3.4 %) compared with 2011. This fall has been more significant in imports from Peru than in those from Chile.

Peru's artisanal fleet landed 450,554 t of whole *Dodisicus gigas* - giant squid in the course of 2012, 13.7 % more than the previous year. Landings were irregular throughout the year and prices followed a downward trend due to a weaker and weaker demand, notably in the last quarter of 2012.

China, Spain and South Korea remain the major importers of *Dodisicus gigas* - giant squid from Peru with a share of 36 %, 18 % and 15 % respectively. Within the EU, Spain imports 83 % of total imports followed by Italy (7 %), France (4 %) and Portugal (3 %).

Exports to the European Union mainly include raw tentacles (ES), raw fillets (ES) and, specially, raw rings (ES). Imports of pulp (PT, DE), pieces and offcuts are slightly lower. Exports have decreased significantly in economical terms compared with 2012, notably as far as concerns raw tentacles and fillets, with reductions of 13 % and 29 %, whereas raw rings have had a slighter decline, 8 %.

Broadly speaking, the Peruvian market is increasing its exports of higher added value products, such as rings, mainly intended for the European market. As far as China is concerned, this country imports some raw products, such as tentacles, wings or fillets, but the most important products are precooked fillets and wings, which account for 63 % and 94 % respectively of total Peruvian exports of these products.

Regarding Chile, the landings of whole *Dodisicus gigas* - giant squid amounted to 144,511 t, 10 % less than in 2011. The European demand hardly decreased (1.4 %). Spain, which accounts for 86 % of European imports of giant squid from Chile, reduced its imports 9 %.

- **Jibias/Cuttlefishes:** As far as the imports of these products are concerned, it is necessary to distinguish the so-called sepias belonging to the Sepiidae family from sepiolas of the Sepiariidae family.

The major suppliers for Europe are India (*Sepia pharaonis*), Morocco (*Sepia officinalis*, *Sepioloa rondeleti*), Senegal (*Sepia officinalis*), China and Mauritania (*Sepia officinalis*).

Sepia officinalis, coming mainly from Morocco and Tunisia, and *Sepia pharaonis*, mainly from India and China, accounted for 93 % of total imports (including sepiolas). In 2012 the imports of sepiolas were not important with respect to the total amount, 4.5 %.

In 2012, the European demand for cuttlefish (*sepia*) dropped and important markets such as Spain and Italy reduced their imports, however this drop occurred at the expense of *Sepia pharaonis* from India, which has experienced a fall of 36 %. The reason for this is a dramatical decrease in this country's catches due to a stock reduction which is put down to overfishing. As far as *Sepia officinalis* is concerned, there has been a rise of 10 %, mainly at the expense of the Morocco.

In Spain, the imports of cuttlefish of the two main species have decreased steadily over the last six years, but for a slight increase in 2009 and 2010. In particular,

imports dropped 10 % in 2012, partly because of the decrease of the imports from India (-35 %): from 14,426 t in 2011 to 9,349 t in 2012.

Regarding Italy, this country imported almost 10,212 t and increased its purchases from France and Spain 60 % and 5 % respectively.

France also has important cuttlefish fishing, whose landings reached 11,472 t in 2012, half of which were intended for the Spanish and Italian markets for processing.

Sepiola EU imports declined by 42 % in 2012 due to a decrease in imports from both Morocco and India.

- **Octopus:** Within this category, statistics and customs tariff do not discriminate appropriately the different species, which is a most important consideration because quality varies considerably and provides a major source of information for operators.

In 2012 the European demand for frozen octopus decreased 15 %; this decline was concentrated in the summer months and was very weak the rest of the year. The low demand and the increase in catches in Morocco and Mauritania (*Octopus vulgaris*) accounted for a price fall up to 30 %.

It is notable that the lesser volume of octopus imported from Mexico (*Octopus maya*), from 13,627 t in 2011 to 6,502 t last year, led to a considerable price rise.

European purchases of octopus from Chile (*Octopus mimus*), Peru (*Octopus mimus*), India (*Octopus mebranaceus* and *Octopus globosus*) and Vietnam (*Octopus ocellatus* and *Octopus vulgaris*) also declined.

Spain reduced its imports of octopus 12.3 %, due to tighter supply and the economic situation. This country increased its buys from Morocco, Mauritania and Portugal, its major suppliers, whilst the volume of imports from India, Mexico and Vietnam declined.

Italy also saw a reduction on imports (-16.7 %); there was a notable increase in purchases from Morocco (43 %) and a reduction from Spain (-22 %).

Prices seem to have stabilized and this situation is expected to continue for some time.

As far as octopus processing is concerned, much of it is sold cooked, both as flower octopus or as octopus tentacles.

6. EU Supply Base

6.1 Overview of EU Fish Stocks

When we prepare this Study the ICES advice has been made available but the summary presentations and final agreements are some way from completion.

The way ICES prepares its advice is evolving to achieve the transition to MSY (Maximum Sustainable Yield) by 2015. This will go onto include an ecosystem approach

as this becomes better defined whilst still maintaining the 'precautionary approach' principle.

Within some of the stock advice now being issued a number of important fisheries have signed up to multi-annual plans and others are progressively getting closer.

The advice can be found at the ICES website www.ices.dk

Continuing the focus that this Study has towards whitefish species below we comment on the EU fisheries in the context of our supplies. Inevitably there is no constancy when discussing activity in wild fisheries but we are optimistic that the long term intent to improve EU fisheries can be matched to market opportunities by the fishing and processing sector working together to develop these.

6.1.1 EU Quota by Species

Of the 7 main species we have extended commentary about in chapter 4 five are subject to EU quo-tas (the exceptions being hoki and Alaska-pollock). In this section we will also add Atlantic pollock and whiting to our discussions as these form part of the EU whitefish fishery complex and in the mixed fishery areas are often caught in some combination.

These EU quotas include shares under agreements with RFMOs such as NAFO and in the Barents Sea under third country arrangements with Norway and Russia.

Between 2011 and 2012 this grouping of quotas saw a cumulative increase of 9 % to 471,000 t. Within this cod was up to 24,000 t (+15 %), haddock 14,000 t (+26 %), saithe down 8,000 t (13 %), whiting up 6,000 t (+17 %) and the others remaining the same as 2011 (extracted from tab. 6.1).

The cumulative total contributes about 11 % to the wild-capture supply in the EU so is important and we are very encouraged to see a positive movement in the total quota. But these volumes cannot credibly sustain all but a fraction of the secondary processing sector.

Our summary in this chapter is the same as last year:

- a. **The EU processing industry for whitefish must rely on imports to be able to meet the demand for these products.**
- b. **The scope for the EU fishermen to increase share in the market is considerable as is their opportunity to contribute to its expansion.**

6.1.2 EU Catches by Quota Species

We find it very difficult to fully reconcile all catches made by EU vessels as the final confirmation of figures does not have to happen until 3 years later and with some activity being in non-EU waters this can complicate matters further.

However we believe our estimates to be quite close.

Quotas are the total allowable catch and the catch is rarely the same number. Within the EU many of the fishery regions, especially in whitefish species, are mixed fisheries where targeting one species results in by-catch of others. All this fish would count against quota when landed but this does not happen as it is presently allowed to discard fish before landing.

However, this and other factors more often than not result in catches very rarely achieving the full potential of quota within the EU.

Taking what statistics are available to us we estimate that for the grouping we outline above total landings actually decreased by 2,000 t leaving approximately 25 % of the quota as not landed - which is a marked deterioration over 2011 when we estimated this to be 17 %. Cod and haddock were each down to utilisation of 78 % against available quota.

Hopefully as a result of the regulatory and management review this type of issue can be addressed and enable the potential of EU fisheries to be more properly met.

6.2 Overview of selected fish Quotas in the World

Being reliant on imports for 90 % of our whitefish supply we are of course very interested in what is happening to quotas in other parts of the world. We include tab. 6.3 to give an overview of some of the key fisheries we rely on and their relative performance. Where we can use official data from the websites of the respective fishery managers but if these are elusive then AIPCE-CEP members will provide credible estimates from their commercial contacts.

The basis for establishing quota levels in all these fisheries is scientific advice and review and increasingly the extent of other stakeholders' inputs is expanding.

For those fisheries that have independent certification claims for sustainability this part of the process is well documented and important to them receiving certification.

Quotas are not constant and go up and down depending on many factors of which fishing activity is only one. Wild-capture fisheries are subject to the natural variation that comes from recruitment fluctuation, changing environmental conditions, weather and host of influences well beyond human control. Management regimes have become more precautionary around the world in response to market pressures to demonstrate responsible and sustainable practices but such market demands are not unique to the EU.

We have discussed some of these global quota changes in our earlier commentary but here is a summary of the key trends:

- The Barents Sea cod fishery is expected to reach an all time peak in 2013 with total quota exceeding 1m tonnes. Biomass are at the highest level in the ICES time series (60+ years).
- However the saithe and haddock fisheries are entering a decline that appears to be cyclical and is expected to trend like this for the next couple of years.
- Iceland has also been seeing increases in the biomass for cod for several years. They are increasing quota for this species. They have also adjusted the fishing effort (F) to reflect a more precautionary approach and it seems they can be confident of further long term improvement.
- USA Alaska-pollock went up slightly (4%) this year and is around the top of the quota cycle - regulatory control limits the absolute catch of all groundfish in the Bering Sea to 2 million t. The other key Alaska fishery is stable with Pacific cod holding around 320,000 t.

- Russian Alaska-pollock catches are expected to be largely unchanged this year.
- Collectively the North Pacific Alaska-pollock fishery is 3 million t + and is the biggest single species consumed as human food.
- New Zealand after several years of caution about increasing its hoki quota is now seeing good fishing and easing the quota up 130,000 t.
- Hakes across the South Atlantic have had mixed performance. In Southern Africa there are some downward pressures in Namibia but largely the quota remains quite stable.

In South America catch rates have become more volatile for a combination of reasons but it seems most of these fisheries are capable of rebounding quite quickly.

These fisheries are the key areas for supplying the EU whitefish processing industry.

They have been able to demonstrate leadership in providing fish that is safe, sustainable and compliant with all the regulatory and market demands.

They have also been able to do this for other key markets around the world and we increasingly feel the effect from this global competition.

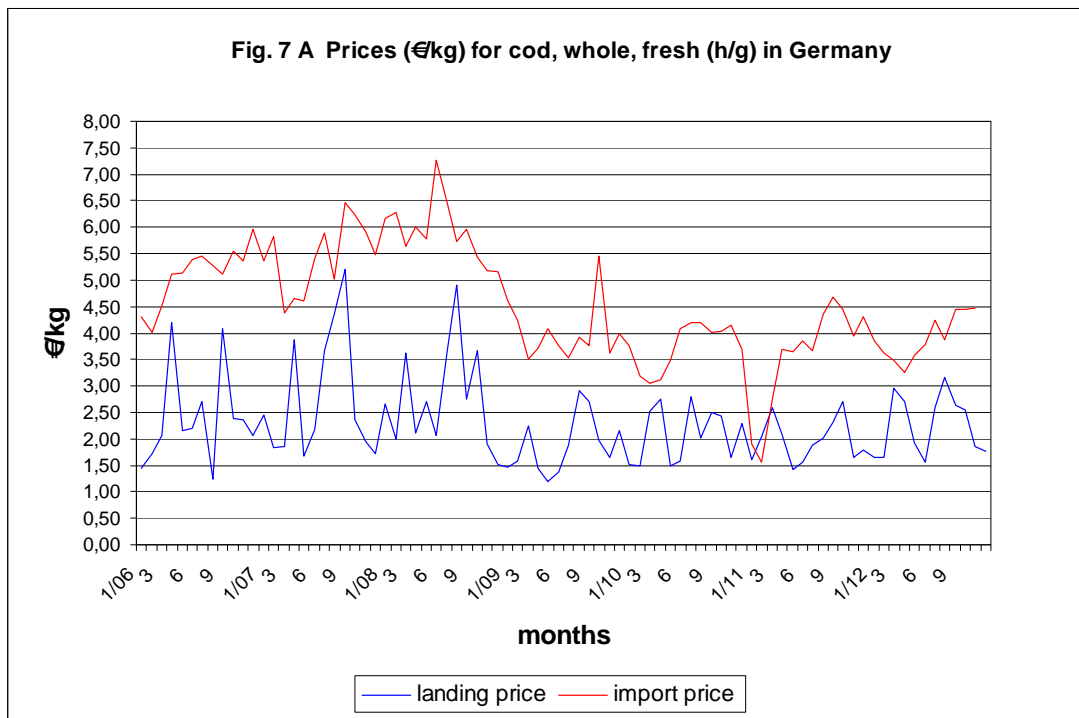
7. National Landed Prices versus Import Prices

It is difficult for AIPCE-CEP to carry out national landing price analysis across the EU because of the wide variations in price, both at member state and then at local level.

This becomes even more complex when trying to compare prices for imported products against local supplies as there are few common presentational formats that stand up. For example industrial blocks are a key material for the frozen processing industry but very few of these are now processed in the EU because we lack the concentration of fish landings to warrant block production.

Similarly most fish landed in the EU is in a fresh state so it should be able to service this market advantageously over imported fish because of the quicker supply time.

So we have continued using the chart from previous years in fig. 7 A that shows data from Germany for cod whole fresh. Again taking aside the usual fluctuations of seasonal supplies this appears to demonstrate that imported product is at a higher price than locally landed fish. Whilst different interpretations can be made of this the gap does seem to be narrower on average in 2012. It does not appear that imports are undercutting local values.



Supply for cod is higher now than we have seen for many years so it is probably natural to expect prices to be trending down. For 2012 the graph does not appear to show this but we are only looking at a very specific item in a very specific market.

The announcement of expectations for huge quota increases in the Barents Sea came in June last year and began to impact ordering activity for frozen cod relatively quickly as companies prepared for the anticipated effect of the increased supply.

The fresh market could not avail itself of any such opportunity and prices continued to respond to daily supply and demand foibles.

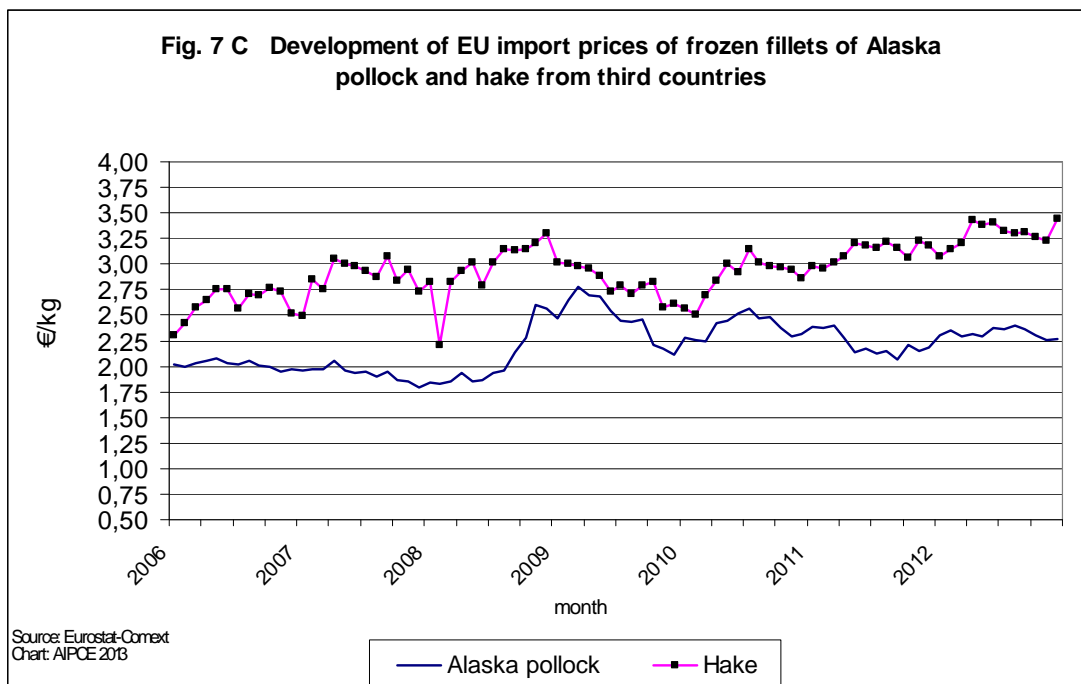
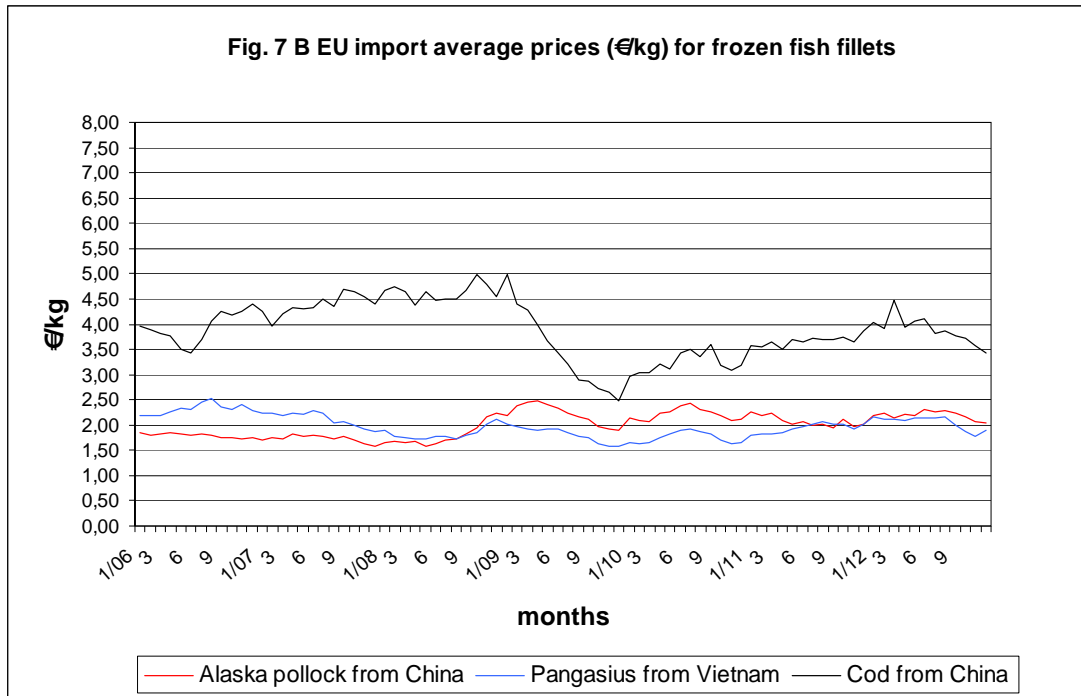
Prices for other key whitefish products were slightly higher in 2012. Single frozen Alaska-pollock block prices were higher in the first two thirds of 2012 by around 5% in € as the legacy stock from 2011 cleared to be replaced by new season fish at a higher \$ cost coupled with the effect of a substantially weaker Euro. However, that trend reversed in the last third of the year as both the dollar price of pollock blocks fell and the Euro strengthened.

Hake block prices were an average 2.5 % higher mainly due to the exchange rate. The poorer supply will have influenced prices but there is some opportunity to switch between hake species that may have offset some of the cost change.

When we look at these trends over a longer period we see that hake has reached the highest Euro level in this time series whereas pollock was back below 2009/10 prices.

Year	Hake fillets	Alaska-pollock fillets
2005	2.10 €/kg	1.84 €/kg
2006	2.62 €/kg	2.02 €/kg
2007	2.87 €/kg	1.93 €/kg
2008	2.95 €/kg	2.04 €/kg
2009	2.82 €/kg	2.47 €/kg
2010	2,87 €/kg	2,39 €/kg
2011	3,13 €/kg	2,21 €/kg
2012	3,29 €/kg	2,32 €/kg

Surimi prices started the year at the same levels as late 2011 but increased sharply due to the combination of hardening \$ prices with strong demand from Asia partly fuelled by a strong Yen at the same time as the Euro/\$ exchange took effect in the opposite direction. The seasonality of this market means any changes here take longer to take effect.



The Euro versus \$ exchange behaved in very much the opposite way to 2011 when the strongest period was in the middle part of the year reaching a peak of 1.46/\$. In 2012 that peak occurred in December but was only at 1.35/\$.

8. In conclusion

This AIPCE-CEP study is compiled for the benefit and use of AIPCE-CEP members and to help others understand the activities of the organisation AIPCE-CEP.

AIPCE-CEP is not liable for any errors in the accuracy of the data or in its representation.

The current regulatory review process in the EU is now coming to its conclusion and we will be able to report in next year's study the full impact of the changes.

In 2012 AIPCE-CEP were successful in contributing to the new Tariff Regulation and helping to maintain or increase the concessionary benefits on several of our key raw materials.

The study has been published for more than 20 years and provides a valuable insight into the changes that have occurred to the seafood market during that time. Whilst the figures in this year's study tell us that available supply in the market declined for the first time since the EU27 came together we remain confident in AIPCE-CEP that the fish and seafood market across the EU can support a successful and vibrant industry. Imports remain the more prominent part of supply but the opportunity for EU fisheries is substantial. We will continue to work on developing the use of resources from around the globe that are safe, sustainable and properly regulated.

AIPCE-CEP would welcome comments and suggestions about additional topics the reader wishes to see covered in further detail (aipce@agep.eu). There are also further publications and commentaries at our website: www.aipce-cep.org.

Appendix Reference Tables

Tab. 4.1 Food balance for fish and fishery products

1,000 tonnes live weight

	EU (15)			EU (25)		EU (27)							
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013 b)
Catches a)	7.414	7.922	7.536	7.230	6.905	5.200	5.136	5.216	5.068	4.944	4.629	4.313	4.356
+ Aquaculture production	-	-	-	-	-	1.336	1.308	1.373	1.302	1.260	1.260	1.260	1.323
- Non-food uses b)	2.500	3.000	2.600	2.500	2.400	1.000	1.000	1.000	1.000	1.000	1.000	700	700
= Supply for consumption	4.914	4.922	4.936	4.730	4.505	5.536	5.444	5.589	5.370	5.204	4.889	4.873	4.979
+ Imports (Third countries) c)	7.050	6.735	7.477	7.993	8.355	8.741	9.061	9.247	8.928	8.894	9.221	8.815	8.991
= Total supply	11.964	11.657	12.413	12.723	12.860	14.277	14.505	14.836	14.298	14.098	14.110	13.688	13.970
- Exports (Third countries) c)	1.879	1.752	1.995	2.239	2.196	1.925	1.944	1.994	1.905	2.104	1.951	1.996	2.096
= Total consumption	10.085	9.905	10.418	10.484	10.664	12.352	12.561	12.842	12.393	11.994	12.159	11.692	11.875
Total supply (kg/caput) d)	32	31	32	28	28	29	29	30	29	28	28	27	28
by catches for consumption in %	41	42	40	37	35	39	38	38	38	37	35	36	36
by third countries imports in %	59	58	60	63	65	61	62	62	62	63	65	64	64
Supply for consumption (kg/caput) e)	26,6	26,0	27,2	22,8	23,1	26,6	25,4	25,8	24,8	23,9	24,2	23,2	23,6
Self-sufficiency (%) f)	49	50	47	45	42	45	43	44	43	43	40	42	42

Notes: a) Incl. Aquaculture production untio 2005.- b) Estimation.- c) Without fishmeal (feed) and fishoil, product weight converted into live weight. Data from 2006 to 2011 are calculated with conversion rates of the year 2012.-

d) Total supply / EU-population * 1000 = kg/caput/year.- e) Supply for consumption / EU-population * 1000.- f) Total consumption / supply for consumption*100 = Rate of self-sufficiency in %.-

Source: FAO, Eurostat-Comext, EU catch report, estimations

Published by: AIPCE 2013

Tab. 4.2 Results of the tables "Origin of imports of important wild captured whitefish into EU from third countries"

calculated on the basis of tonnes live weight

Species	Catches of quoted species					Third countries imports					Total supply (catches + import)				
	1000 tonnes					1000 tonnes					1000 tonnes				
	Year	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011
Total a)	292	298	317	320	321	2.564	2.446	2.452	2.613	2.504	2.856	2.744	2.769	2.933	2.825
Cod	117	126	138	139	144	746	799	822	873	866	863	925	960	1.012	1.010
Saithe	65	53	52	54	48	176	191	168	132	115	241	244	220	186	163
Hake	46	49	55	61	62	479	468	471	468	400	525	517	526	529	462
Alaska-Pollock	-	-	-	-	-	907	719	723	854	850	907	719	723	854	850
Haddock	47	50	47	46	52	153	164	166	176	180	200	214	213	222	232
A. Redfish	17	20	25	20	15	73	75	61	60	51	90	95	86	80	66
Hoki	-	-	-	-	-	30	30	41	50	42	30	30	41	50	42
Plaice b)	62	65	75	77	82	9	7	6	6	6	71	72	81	83	88

Species	Total supply:										Third countries imports:				
	by catches					by third countries imports					by imports from China				
	Year	2008-2012					2008-2012					2008-2012			
Total a)	10	11	11	11	11	90	89	89	89	89	24	21	22	23	25
Cod	14	14	14	14	14	86	86	86	86	86	19	14	16	18	16
Saithe	27	22	24	29	29	73	78	76	71	71	9	11	13	18	16
Hake	9	9	10	12	13	91	91	90	88	87	1	1	2	2	2
Alaska-Pollock	-	-	-	-	-	100	100	100	100	100	45	55	54	50	47
Haddock	24	23	22	21	22	77	77	78	79	78	17	18	20	21	20
A. Redfish	19	21	29	25	23	81	79	71	75	77	26	21	25	20	18
Hoki	-	-	-	-	-	100	100	100	100	100	28	37	32	24	23
Plaice b)	87	90	93	93	93	13	10	7	7	7	25	11	9	5	1

Notes: a) Total of the 7 listed species without plaice.- b) Listed for reason of comparison.-

Source: Eurostat-Comext; EU catch report.-
Published by: AIPCE 2013

**Tab. 4.3 Origin of imports into EU from third countries
for important wild captured white fish species a)**

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh	155.767	141.570	132.823	120.085	100	-10
of it from Norway	52.867	69.324	71.391	67.988	57	-5
Iceland	48.327	28.132	22.641	21.904	18	-3
Faroe Isles	11.466	11.419	7.241	4.433	4	-39
Russia	442	807	952	557	0	-
South Africa	15.041	12.069	11.316	8.273	7	-27
Namibia	6.700	4.089	4.843	4.564	4	-6
Whole, frozen	280.309	250.736	260.829	260.906	100	0
of it from Norway	69.453	71.126	80.781	84.600	32	5
Iceland	21.894	13.161	13.870	11.638	4	-16
Faroe Isles	1.483	1.198	1.198	1.381	1	15
Russia	65.952	49.040	55.290	57.800	22	5
South Africa	14.557	14.552	17.555	19.334	7	10
Argentina	19.559	16.870	13.977	10.386	4	-26
Namibia	15.310	11.027	8.724	9.912	4	14
Fillet, fresh c)	67.881	67.442	67.985	80.323	100	18
of it from Norway	22.605	19.769	17.589	18.179	23	3
Iceland	39.921	42.334	46.186	53.166	66	15
Faroe Isles	5.320	5.145	4.055	7.764	10	91
Fillet, frozen	1.499.629	1.545.829	1.690.482	1.594.395	100	-6
of it from Norway	69.325	68.112	61.975	55.891	4	-10
Iceland	155.335	133.460	127.432	109.397	7	-14
Faroe Isles	58.817	59.007	37.976	37.113	2	-2
Russia	140.640	133.177	156.329	159.174	10	2
South Africa	33.950	35.334	39.173	35.180	2	-10
Argentina	89.306	90.326	83.884	58.321	4	-30
Namibia	105.194	112.751	117.263	118.761	7	1
USA	208.867	239.466	319.339	344.618	22	8
New Zealand	18.719	27.589	36.893	30.988	2	-16
China	565.911	589.392	649.685	592.931	37	-9
Meat, frozen	135.760	130.305	136.983	137.191	100	0
of it from Norway	2.659	2.740	3.358	2.782	2	-17
Iceland	11.139	13.347	10.916	10.271	7	-6
Faroe Isles	14.013	7.390	2.510	3.327	2	33
Russia	26.777	23.088	27.723	24.827	18	-10
USA	22.434	44.623	40.773	51.673	38	27
Argentina	11.214	10.519	6.548	4.687	3	-28
Namibia	23.009	19.412	20.400	15.730	11	-23
China	13.391	11.839	17.357	17.418	13	0
Fish and Fillet, dry/salted	306.912	317.061	324.072	310.172	100	-4
of it from Norway	171.898	192.238	192.599	186.897	60	-3
Iceland	90.731	82.202	84.102	79.758	26	-5
Supply (Catches + Import)	2.744.955	2.770.982	2.932.604	2.825.278	100	-4
of it catches of quoted species	298.697	318.038	319.431	322.206	11	1
import from third countries	2.446.258	2.452.944	2.613.173	2.503.072	89	-4
of it from China d)	589.324	611.800	679.601	619.481	25	-9
USA d)	280.229	324.174	413.834	447.940	18	8
Norway	388.808	423.309	427.691	416.338	17	-3
Iceland	367.405	312.637	305.147	286.135	11	-6
Russia d)	229.730	200.526	232.419	243.397	10	5
Namibia d)	150.213	147.280	151.229	148.966	6	-1
Argentina d)	120.793	118.445	104.709	73.394	3	-30
Faroe Isles d)	105.990	102.842	71.492	66.995	3	-6
South Africa d)	65.948	63.449	69.491	63.787	3	-8
New Zealand d)	22.778	31.784	40.155	33.664	1	-16
Chile d)	37.537	34.436	28.374	24.967	1	-12
Uruguay d)	17.101	26.333	30.914	16.416	1	-47
Peru d)	21.706	21.800	20.040	15.557	1	-22

Notes: a) Cod, saithe, redfish, haddock, hake, alaska-pollock and hoki.- b) Selected countries, which are most important for EU supply with white fish.- c) Cod, saithe and redfish.- d) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.- Published by: AIPCE 2013

Tab. 4.4 Origin of imports into EU from third countries for cod a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh	39.162	41.143	41.852	39.347	100	-6
of it from Argentina	-	-	-	-	-	-
Faroe Isles	2.560	3.822	2.610	1.504	4	-42
Iceland	9.934	4.681	4.772	5.629	14	18
USA	-	-	-	-	-	-
Norway	26.577	32.552	34.455	32.204	82	-7
Russia	24	-	-	-	-	-
South Africa	-	11	-	-	-	-
Whole, frozen	127.521	116.684	120.550	133.799	100	11
of it from Argentina	-	-	-	-	-	-
Faroe Isles	123	372	236	598	0	153
Iceland	1.254	845	443	860	1	94
USA	38.148	43.430	38.419	37.986	28	-1
Norway	19.764	20.859	24.932	33.807	25	36
Russia	59.048	41.592	47.273	50.501	38	7
South Africa	-	-	-	-	-	-
Fillet, fresh	55.758	55.014	56.277	63.967	100	14
of it from Faroe Isles	1.096	1.029	1.146	1.110	2	-3
Iceland	33.378	35.487	38.226	45.475	71	19
Norway	21.249	18.306	16.754	17.374	27	4
Fillet, frozen	249.197	271.807	303.601	296.578	100	-2
of it from Argentina	45	-	13	-	-	-
Chile	-	-	-	-	-	-
China	97.122	115.705	137.293	122.986	41	-10
Faroe Isles	12.494	13.254	14.409	13.430	5	-7
Iceland	70.058	65.216	67.723	59.320	20	-12
USA	109	1.441	670	933	0	39
New Zealand	9	4	-	-	-	-
Norway	28.387	35.296	31.573	28.896	10	-8
Russia	28.814	32.879	44.543	55.890	19	25
South Africa	-	-	-	-	-	-
Meat, frozen	20.794	20.987	26.391	21.946	100	-17
of it from Argentina	-	-	-	-	-	-
China	6.418	4.501	8.971	7.016	32	-22
Faroe Isles	233	304	211	116	1	-45
Iceland	6.632	8.555	7.573	7.253	33	-4
USA	2.970	3.500	3.237	2.859	13	-12
Norway	2.426	2.128	3.141	2.405	11	-23
South Africa	-	-	-	-	-	-
Fish and Fillet, dry/salted	306.912	317.061	324.072	310.172	100	-4
of it from Iceland	90.731	82.202	84.102	79.758	26	-5
Norway	171.898	192.238	192.599	186.897	60	-3
Supply (Catches + Import)	925.578	961.144	1.011.370	1.010.430	100	0
of it catches of quoted species	126.234	138.449	138.629	144.620	14	4
import from third countries	799.344	822.695	872.741	865.810	86	-1
of it from Norway	270.303	301.379	303.454	301.584	35	-1
Iceland	211.986	196.986	202.838	198.295	23	-2
China c)	113.268	130.492	158.598	138.960	16	-12
Russia c)	97.593	82.765	105.900	125.476	14	18
USA c)	43.143	50.014	43.920	42.973	5	-2
Faroe Isles c)	31.320	37.010	37.033	29.655	3	-20
Vietnam c)	1.172	1.043	521	5.723	1	-
Canada c)	9.268	7.001	4.170	2.471	0	-41
Argentina c)	45	-	13	-	-	-

Notes: a) Gadus morhua, ogac and macrocephalus.- b) Selected countries, which are most important for EU supply with white fish.- c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2013

Tab. 4.5 Origin of imports into EU from third countries for saithe a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh	14.363	13.029	10.346	9.077	100	-12
of it from Argentina	-	-	-	-	-	-
Faroe Isles	3.705	1.309	759	276	3	-64
Iceland	1.238	789	1.045	767	8	-27
Namibia	-	-	-	-	-	-
Norway	9.420	10.931	8.543	8.034	89	-6
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	28.276	22.593	24.122	15.746	100	-35
of it from Argentina	-	-	-	-	-	-
Faroe Isles	22	27	1	50	0	-
Iceland	402	400	425	137	1	-68
Namibia	-	-	-	-	-	-
Norway	26.767	22.171	23.450	14.541	92	-38
Russia	69	46	514	1.018	6	98
South Africa	-	-	-	-	-	-
Fillet, fresh	7.244	7.539	5.928	9.749	100	64
of it from Faroe Isles	4.122	4.038	2.909	6.653	68	129
Iceland	1.809	2.067	2.204	2.313	24	5
Norway	1.313	1.434	815	783	8	-4
Fillet, frozen	123.891	115.219	87.724	75.229	100	-14
of it from Argentina	-	-	-	-	-	-
Chile	-	-	13	17	0	-
China	20.305	22.246	23.591	17.878	24	-24
Faroe Isles	43.133	43.004	22.169	22.335	30	1
Iceland	45.598	36.781	33.006	26.043	35	-21
Namibia	-	-	-	-	-	-
New Zealand	-	-	-	-	-	-
Norway	14.212	12.200	8.357	7.186	10	-14
Russia	113	308	51	1.026	1	-
South Africa	-	-	-	-	-	-
Meat, frozen	16.652	9.617	4.091	4.986	100	22
of it from Argentina	-	-	-	-	-	-
China	382	116	134	397	8	197
Iceland	2.456	2.495	1.594	1.482	30	-7
Faroe Isles	13.603	6.831	2.208	2.928	59	33
Namibia	-	-	-	-	-	-
Norway	203	175	155	179	4	15
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	243.673	220.360	185.760	162.773	100	-12
of it catches of quoted species	53.247	52.362	53.549	47.986	29	-10
import from third countries	190.426	167.998	132.211	114.787	71	-13
of it from Faroer Islands	64.585	55.210	28.045	32.243	28	15
Iceland	51.502	42.532	38.274	30.742	27	-20
Norway	51.916	46.910	41.321	30.723	27	-26
China c)	20.747	22.368	23.742	18.275	16	-23
Russia c)	182	353	565	2.044	2	262

Notes: a) Pollachius virens.- b) Selected countries, which are most important for EU supply with white fish.-

c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.6 Origin of imports into EU from third countries for redfish a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh	18.429	16.626	13.217	11.782	100	-11
of it from Argentina	-	-	-	-	-	-
Faroe Isles	936	1.718	601	477	4	-21
Iceland	13.712	11.351	10.087	9.043	77	-10
Namibia	-	-	-	-	-	-
Norway	3.622	3.398	2.470	2.208	19	-11
Russia	8	-	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	22.949	15.242	20.263	14.501	100	-28
of it from Argentina	66	-	1	-	-	-
Faroe Isles	1.183	413	410	84	1	-80
Iceland	19.480	11.698	12.726	10.479	72	-18
Namibia	-	-	-	-	-	-
Norway	1.079	1.103	994	558	4	-44
Russia	1.002	1.724	2.351	1.164	8	-50
South Africa	-	-	-	-	-	-
Fillet, fresh	4.879	4.889	5.780	6.606	100	14
of it from Faroe Isles	102	78	-	-	-	-
Iceland	4.734	4.780	5.756	5.378	81	-7
Norway	42	30	20	22	0	14
Fillet, frozen	28.446	23.786	20.552	17.342	100	-16
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	15.611	14.923	11.789	9.143	53	-22
Faroe Isles	243	92	163	86	0	-47
Iceland	12.017	8.711	8.343	7.544	44	-10
Namibia	-	-	-	-	-	-
New Zealand	-	7	6	-	-	-100
Norway	5	54	35	26	0	-25
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Meat, frozen	234	318	413	367	100	-11
of it from Argentina	-	-	-	-	-	-
China	-	59	73	69	19	-
Faroe Isles	-	-	-	-	-	-
Iceland	219	259	304	297	81	-2
Namibia	-	-	-	-	-	-
Norway	-	-	-	-	-	-
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	95.136	86.047	80.081	66.055	100	-18
of it catches of quoted species	20.199	25.186	19.856	15.458	23	-22
import from third countries	74.937	60.861	60.225	50.597	77	-16
of it from Iceland	50.161	36.799	37.217	32.741	65	-12
China c)	15.742	15.065	11.904	9.212	18	-23
Norway	4.749	4.585	3.519	2.814	6	-20
Russia c)	1.010	1.724	2.351	1.164	2	-50
Faroe Isles	2.465	2.301	1.174	646	1	-45
USA	287	11	98	582	1	-
India c)	24	45	30	116	0	281
New Zealand c)	-	7	6	-	-	-
Argentina c)	66	-	1	-	-	-
South Africa c)	-	-	-	-	-	-
Chile c)	-	-	-	-	-	-

Notes: a) Sebastes species.- b) Selected countries, which are most important for EU supply with white fish.-

c) Incl. quantities not listed above.-

Tab. 4.7 Origin of imports into EU from third countries for haddock a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh	38.620	36.055	34.310	32.391	100	-6
of it from Argentina	-	-	-	-	-	-
Faroe Isles	4.257	4.567	3.268	2.176	7	-33
Iceland	23.430	11.311	6.736	6.466	20	-4
Namibia	-	-	-	-	-	-
Norway	10.933	20.177	24.306	23.749	73	-2
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	26.502	32.870	35.724	40.748	100	14
of it from Argentina	-	-	-	-	-	-
Faroe Isles	154	747	552	649	2	18
Iceland	758	218	275	162	0	-41
Namibia	-	-	-	-	-	-
Norway	21.170	26.482	30.599	35.290	87	15
Russia	4.326	5.221	4.257	4.521	11	6
South Africa	-	-	-	-	-	-
Fillet, frozen	95.339	92.902	103.018	104.117	100	1
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	27.633	31.710	36.580	35.465	34	-3
Faroe Isles	2.947	2.656	1.235	1.262	1	2
Iceland	27.658	22.752	18.359	16.490	16	-10
Namibia	-	-	-	-	-	-
New Zealand	-	-	-	-	-	-
Norway	25.953	20.545	21.797	19.679	19	-10
Russia	9.761	13.335	22.777	28.649	28	26
South Africa	-	-	-	-	-	-
Meat, frozen	3.373	4.346	2.977	2.828	100	-5
of it from Argentina	-	-	-	-	-	-
China	1.334	1.608	1.116	1.087	38	-3
Faroe Isles	177	255	92	283	10	208
Iceland	1.832	2.039	1.445	1.240	44	-14
Namibia	-	-	-	-	-	-
Norway	29	437	61	198	7	226
Russia	-	8	190	20	1	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	213.951	212.883	222.320	232.299	100	4
of it catches of quoted species	50.117	46.711	46.291	52.215	22	13
import from third countries	163.834	166.172	176.029	180.084	78	2
ot it from Norway	58.085	67.640	76.763	78.916	44	3
China c)	29.017	33.409	37.696	36.587	20	-3
Russia c)	14.087	18.564	27.223	33.190	18	22
Iceland	53.679	36.319	26.816	24.357	14	-9
Faroe Isles	7.535	8.224	5.146	4.370	2	-15
South Africa c)	-	-	-	-	-	-

Notes: a) *Melanogrammus aeglefinus*. - b) Selected countries, which are most important for EU supply with white fish.-

c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2013

Tab. 4.8 Origin of imports into EU from third countries for hake a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh	44.097	33.651	32.352	26.884	100	-17
of it from Argentina	715	730	301	-	-	-100
Chile	11.248	9.427	7.300	5.230	19	-28
Namibia	6.700	4.089	4.843	4.564	17	-6
Norway	1.255	1.224	907	1.196	4	32
Peru	-	-	-	-	-	-
USA	411	807	952	557	2	-42
South Africa	15.041	12.058	11.316	8.273	31	-27
Uruguay	-	-	-	-	-	-
Whole, frozen	73.252	62.091	58.840	55.003	100	-7
of it from Argentina	19.493	16.870	13.976	10.386	19	-26
Chile	14.573	11.049	8.855	7.937	14	-10
Namibia	15.310	11.027	8.724	9.912	18	14
Norway	243	259	499	404	1	-19
Peru	-	-	11	-	-	-
USA	1.508	457	894	490	1	-45
South Africa	14.557	14.552	17.555	19.334	35	10
Uruguay	-	42	-	-	-	-
Fillet, frozen	295.095	321.425	325.936	276.567	100	-15
of it from Argentina	89.261	90.325	83.863	58.185	21	-31
Chile	3.746	6.223	5.547	4.613	2	-17
China	3.238	7.519	8.569	7.284	3	-15
Namibia	105.194	112.751	117.263	118.761	43	1
Peru	18.528	18.498	17.251	13.258	5	-23
Russia	4	-	-	-	-	-
South Africa	33.950	35.334	39.173	35.180	13	-10
Uruguay	13.588	20.530	25.054	13.736	5	-45
USA	26.884	29.707	28.613	27.429	10	-4
Meat, frozen	55.525	53.547	51.252	41.130	100	-20
of it from Argentina	11.214	10.519	6.548	4.687	11	-28
Chile	7.904	7.524	6.471	7.169	17	11
China	321	66	-	-	-	-
Namibia	23.009	19.412	20.400	15.730	38	-23
Norway	-	-	-	-	-	-
Peru	2.582	2.994	1.893	1.003	2	-47
USA	5.465	8.117	11.144	9.990	24	-10
South Africa	2.358	1.472	1.408	980	2	-30
Uruguay	2.003	3.265	3.253	1.545	4	-52
Supply (Catches + Import)	516.868	526.044	529.487	461.511	100	-13
of it catches of quoted species	48.900	55.330	61.106	61.927	13	1
import from third countries	467.968	470.714	468.381	399.584	87	-15
of it from Namibia c)	150.213	147.280	151.229	148.966	37	-1
Argentina c)	120.683	118.445	104.688	73.258	18	-30
South Africa	65.948	63.439	69.491	63.787	16	-8
USA	34.267	39.519	41.604	38.466	10	-8
Chile c)	37.471	34.223	28.173	24.949	6	-11
Uruguay	17.101	26.333	30.914	16.416	4	-47
Peru	21.706	21.800	20.040	15.557	4	-22
China c)	3.559	7.628	8.569	7.395	2	-14
Norway	1.498	1.491	1.476	1.612	0	9
Russia c)	16	2	1	7	0	-

Notes: a) Merluccius spp. and urophycis spp.- b) Selected countries, which are most important for EU supply with white fish.- c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2013

Tab. 4.9 Origin of imports into EU from third countries for Alaska-pollock and pollock a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh c)	1.096	1.066	746	605	100	-19
or it from Argentina	-	-	-	-	-	-
Faroe Isles	9	2	3	0	0	-96
Iceland	13	1	-	-	-	-
Norway	1.059	1.041	710	596	99	-16
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
USA	-	-	-	-	-	-
Whole, frozen d)	1.719	1.158	1.185	1.016	100	-14
of it from Argentina	-	-	-	-	-	-
Faroe Isles	-	-	-	-	-	-
Iceland	-	-	-	-	-	-
Namibia	-	-	-	-	-	-
Norway	431	253	306	-	-	-100
Russia	-	-	2	106	10	-
South Africa	-	-	-	-	-	-
USA	1.160	816	662	849	84	28
Fillet, frozen e)	677.303	679.666	800.068	782.447	100	-2
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	390.702	384.310	419.754	390.648	50	-7
Faroe Islands	-	-	-	-	-	-
Iceland	-	-	-	-	-	-
Namibia	-	-	-	-	-	-
Norway	767	8	142	41	0	-
Russia	101.949	86.655	88.959	73.609	9	-17
South Africa	-	-	-	-	-	-
USA	181.874	208.319	289.993	316.256	40	9
Meat, frozen e)	39.183	41.491	51.859	65.935	100	27
of it from Argentina	-	-	-	-	-	-
China	4.936	5.490	7.064	8.850	13	25
Faroes Islands	-	-	-	-	-	-
Iceland	-	-	-	-	-	-
Norway	-	-	-	-	-	-
Russia	14.894	10.462	7.418	7.801	12	5
South Africa	-	-	-	7	-	-
USA	19.464	25.495	37.537	48.814	74	30
Supply (Catches + Import)	719.301	723.381	853.857	850.003	100	0
of it catches of quoted species	-	-	-	-	-	-
import from third countries	719.301	723.381	853.857	850.003	100	0
of it from China f)	395.666	389.853	426.949	399.527	47	-6
USA	202.498	234.630	328.192	365.918	43	11
Russia	116.843	97.117	96.379	81.516	10	-15
South Korea	1.840	463	177	2.068	0	-
Norway	2.257	1.302	1.158	638	0	-45
Vietnam	140	63	563	120	0	-79
Canada	60	60	182	71	0	-61
South Africa	-	-	-	7	0	-
Faroe Isles	9	2	3	0	0	-96
Namibia f)	-	-	-	-	-	-

Notes: a) Theragra chalcogramma and Pollachius pollachius.- b) Selected countries, which are most important for EU supply with white fish.- c) Pollock (Pollachius pollachius).- d) Alaska-Pollock and pollock (Theragra chalcogramma and Pollachius pollachius until 2011.- e) Alaska-Pollock (Theragra chalcogramma).- f) Incl. quantities not listed above.-

Tab. 4.10 Origin of imports into EU from third countries for hoki a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh	d)	d)	d)	d)		
of it from Argentina	d)	d)	d)	d)		
Faroe Isles	d)	d)	d)	d)		
Iceland	d)	d)	d)	d)		
Norway	d)	d)	d)	d)		
Russia	d)	d)	d)	d)		
South Africa	d)	d)	d)	d)		
Thailand	d)	d)	d)	d)		
USA	d)	d)	d)	d)		
Whole, frozen	90	98	146	94	100	-35
of it from Argentina	-	-	-	-	-	-
French South. Territ.	62	88	91	81	86	-
Iceland	-	-	-	-	-	-
China	-	-	-	-	-	-
New Zealand	4	5	21	13	14	-40
Norway	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Thailand	-	-	-	-	-	-
USA	-	-	-	-	-	-
Fillet, frozen	30.359	41.025	49.583	42.114	100	-15
of it from Argentina	-	0	8	136	0	-
Chile	57	213	188	-	-	-100
China	11.300	12.979	12.110	9.526	23	-21
Faroe Isles	-	-	-	-	-	-
Iceland	4	-	-	-	-	-
Namibia	-	-	-	-	-	-
New Zealand	18.710	27.577	36.887	30.988	74	-16
Norway	-	1	-	50	0	-
South Africa	-	-	-	-	-	-
Thailand	-	-	-	71	0	-
USA	-	-	64	-	-	-
Meat, frozen	d)	d)	d)	d)		
of it from Argentina	d)	d)	d)	d)		
Faroe Isles	d)	d)	d)	d)		
Iceland	d)	d)	d)	d)		
Norway	d)	d)	d)	d)		
Russia	d)	d)	d)	d)		
South Africa	d)	d)	d)	d)		
Thailand	d)	d)	d)	d)		
USA	d)	d)	d)	d)		
Supply (Catches + Import)	30.448	41.123	49.729	42.208	100	-15
of it catches of quoted species	-	-	-	-	-	-
import from third countries	30.448	41.123	49.729	42.208	100	-15
of it from New Zealand c)	18.714	27.582	36.908	31.000	73	-16
China c)	11.325	12.983	12.144	9.526	23	-22
Argentina c)	-	0	8	136	0	-
Faroe Isles	62	88	91	81	0	-11
Thailand c)	-	-	-	71	0	-
Norway	-	1	-	50	0	-
Chile c)	57	213	188	-	-	-
USA c)	-	-	64	-	-	-
South Africa c)	-	-	-	-	-	-
Iceland	4	-	-	-	-	-
Namibia c)	-	-	-	-	-	-

Notes: a) *Macruronus novaezealandiae*.- b) Selected countries, which are most important for EU supply with white fish.- c) Incl. quantities not listed above.- d) Not available.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.11 Origin of imports into EU from third countries for plaice a)

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh	4.533	3.849	3.261	3.676	100	13
of it from Faroe Isles	169	193	219	237	6	8
Iceland	2.820	2.126	1.350	2.021	55	50
Norway	1.540	1.529	1.692	1.418	39	-16
Russia	-	-	-	-	-	-
USA	0	-	-	-	-	-
Whole, frozen	518	313	297	232	100	-22
of it from Faroe Isles	1	-	5	25	11	-
Iceland	208	149	47	17	7	-63
Norway	17	16	0	3	1	-
Russia	131	-	4	2	1	-
USA	-	-	0	-	-	-
Fillet, frozen	2.354	1.989	1.997	1.944	100	-3
of it from China	791	531	204	42	2	-79
Faroe Isles	2	1	3	1	0	-64
Iceland	1.560	1.449	1.791	1.901	98	6
Norway	2	9	-	-	-	-
Russia	-	-	-	-	-	-
Supply (Catches + Import)	72.060	81.287	82.769	87.833	100	6
of it catches of quoted species	64.655	75.136	77.214	81.981	93	6
import from third countries	7.405	6.151	5.555	5.852	7	5
of it from Iceland	4.588	3.724	3.188	3.940	67	24
Norway	1.559	1.554	1.693	1.421	24	-16
Faroe Isles	172	194	227	263	5	16
China	819	576	305	64	1	-79
Russia	131	-	4	2	0	-44
USA	0	-	0	-	-	-

Notes: a) Pleuronectes Platessa.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.12 Origin of imports into EU from third countries for surimi a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Surimi, frozen	144.752	183.425	212.531	204.013	100	-4
of it from USA	64.262	77.666	115.162	111.430	55	-3
Chile	21.074	16.618	5.636	4.895	2	-13
Vietnam	36.599	49.428	58.047	61.647	3	6
Thailand	11.253	16.914	10.859	7.295	4	-33
Argentina	3.079	6.280	2.476	4.157	2	68
India	3.333	10.586	12.568	12.849	6	2
China	3.314	1.891	688	327	0	-52
Faroe Isles	-	-	614	529	0	-
Russia	1.874	89	172	-	-	-100
Surimipresentation, frozen	70.574	68.117	63.739	55.494	100	-13
of it from China	28.225	26.828	24.442	21.639	39	-11
Thailand	21.310	21.164	19.034	16.433	30	-14
India	14.917	14.484	14.826	12.681	23	-14
South Korea	3.551	3.445	3.705	3.180	6	-14
Malaysia	4	495	416	583	1	40
Japan	302	261	392	288	1	-26
USA	196	125	263	109	0	-58
Peru	1.348	680	34	-	-	-100
Russia	150	-	-	-	-	-
Supply (Catches + Import)	217.199	253.046	277.560	260.250	94	-6
of it catches of quoted species	-	-	-	-	-	0
import from third countries	217.199	253.046	277.560	260.250	94	-6
of it from USA	64.458	77.791	115.425	111.539	42	-3
Vietnam c)	37.714	50.431	59.041	62.437	21	6
China c)	31.539	28.719	25.130	21.966	9	-13
Thailand	32.563	38.078	29.893	23.728	11	-21
India	18.250	25.069	27.394	25.530	10	-7
South Korea c)	3.552	3.445	3.705	3.180	1	-14
Chile c)	21.074	16.618	5.636	4.895	2	-13
Argentina c)	3.079	6.280	2.476	4.157	1	68
Peru c)	2.114	3.561	5.732	3.058	2	-47
Malaysia c)	4	495	416	583	0	40
Japan c)	302	261	392	288	0	-26
Singapore	409	217	209	210	0	1

Notes: a) Surimi and surimi presentations.- b) Selected countries, which are most important for EU supply with surimi and surimi presentation.-
c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.13 Origin of imports into EU from third countries for freshwater fish a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010 d)	2011 d)	2012 d)	2012	12/11
Whole, fresh	2.568	2.413	2.736	758	100	-72
of it from Kenya	3	6	244	-	-	-100
Norway	1	1	1	2	0	36
Russia	66	46	50	69	9	37
Tanzania	132	96	193	12	2	-94
Uganda	2.268	2.168	1.993	556	73	-72
Whole, frozen	35.338	33.692	41.364	17.012	100	-59
of it from Bangladesh	3.640	2.856	4.268	2.254	13	-47
China	8.255	9.901	13.532	2.587	15	-81
Indonesia	1.404	862	1.629	180	1	-89
Kenya	644	856	794	30	0	-96
Tanzania	997	991	1.098	42	0	-96
Thailand	6.494	4.847	3.899	835	5	-79
Uganda	1.407	1.841	1.158	120	1	-90
Vietnam	2.159	2.077	2.473	654	4	-74
Fillet, fresh	59.774	4.824	3.439	5.070	100	47
of it from Kenya	4.848	361	30	-	-	-100
Russia	1.136	921	628	-	-	-100
Tanzania	26.401	737	851	59	1	-93
Uganda	24.744	1.606	1.067	-	-	-100
Vietnam	1.077	397	-	4.101	81	-
Fillet, frozen	793.145	65.464	50.707	34.931	100	-31
of it from China	24.925	6.401	11.875	9.878	28	-17
Indonesia	4.022	625	73	40	0	-45
Kenya	1.967	120	-	2	0	-
Kasachstan	17.613	15.570	13.766	14.965	43	9
Russia	5.382	5.842	6.993	5.068	15	-28
Tanzania	13.290	1.033	748	214	1	-71
Uganda	2.974	547	233	-	-	-100
Vietnam	718.008	32.217	14.764	2.441	7	-83
Meat, fresh	3.997	2.821	3.223	1.722	100	-47
of it from Norway	282	435	658	32	2	-95
Sri Lanka	926	636	401	418	24	4
USA	1.374	614	648	351	20	-46
Meat, frozen	13.730	9.771	8.353	8.034	100	-4
of it from Chile	3.544	1.542	1.708	2.548	32	49
Norway	984	1.215	834	212	3	-75
Vietnam	5.666	3.479	2.364	2.107	26	-11
Supply (Catches + Import)	908.551	118.986	109.821	67.526	100	-39
of it catches of quoted species	-	-	-	-	-	-
import from third countries	908.551	118.986	109.821	67.526	100	-39
of it from Kasachstan c)	17.875	15.893	14.104	15.221	23	8
China c)	34.526	17.824	27.132	13.339	20	-51
Vietnam c)	726.910	38.170	19.601	9.303	14	-53
Russia c)	6.719	6.982	7.865	5.404	8	-31
Chile c)	3.568	1.610	1.883	2.563	4	36
Bangladesh c)	3.640	2.856	4.268	2.254	3	-47
Thailand c)	7.387	4.940	3.962	1.017	2	-74
Uganda c)	31.455	6.185	4.451	735	1	-83
USA c)	2.088	1.109	1.280	660	1	-48
Iceland c)	1.167	673	1.059	553	1	-48

Notes: a) Different species of freshwater fish other than salmon, trout and carp.-

b) Selected countries, which are most important for EU supply with freshwater fish other than salmon, trout and carp.-

c) Incl. quantities not listed above.- d) Not comparable with previous years due to change of CN-Code and new coverage of fish species (without pangasius, Nile perch and tilapia).-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.14 Origin of imports into EU from third countries for pangasius

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009 a)	2010	2011	2012 b)	2012	12/11
Fillet, fresh	-	7.000	5.885	16.664	100	183
of it from Bangladesh	-	-	-	-	-	-
China	-	-	-	-	-	-
Ecuador	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-
Kenya	-	-	-	-	-	-
Thailand	-	22	-	13	0	-
Tanzania	-	-	-	-	-	-
Uganda	-	-	-	-	-	-
Vietnam	-	6.978	5.885	16.395	98	179
Zimbabwe	-	-	-	-	-	-
Fillet, frozen	-	696.961	611.192	476.008	100	-22
of it from Bangladesh	-	222	130	146	0	12
China	-	593	1.235	987	0	-20
Ecuador	-	-	-	-	-	-
Indonesia	-	-	49	-	-	-
Kenya	-	-	-	-	-	-
Thailand	-	97	98	44	0	-56
Tanzania	-	-	-	-	-	-
Uganda	-	31	-	-	-	-
Vietnam	-	695.942	609.648	474.532	100	-22
Zimbabwe	-	-	-	-	-	-
Supply (Catches + Import)	-	703.961	617.077	492.672	100	-20
of it catches of quoted species	-	-	-	-	-	-
import from third countries	-	703.961	617.077	492.672	100	-20
of it from Vietnam	-	702.920	615.533	490.927	100	-20
China	-	593	1.235	987	0	-20
Bangladesh	-	222	130	146	0	12
Thailand	-	119	98	57	0	-42
Uganda	-	31	-	-	-	-

Note: a) No separate import figures are available.-b) Including other catfish species.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2013

Tab. 4.15 Origin of imports into EU from third countries for Nile perch

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009 a)	2010	2011	2012	2012	12/11
Fillet, fresh	-	47.589	46.804	47.005	100	0
of it from Bangladesh	-	-	-	-	-	-
China	-	-	-	-	-	-
Ecuador	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-
Kenya	-	4.463	5.137	5.190	11	-
Thailand	-	-	-	-	-	-
Tanzania	-	21.249	22.717	20.386	43	-
Uganda	-	21.872	18.944	21.382	45	-
Vietnam	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-
Fillet, frozen	-	22.649	14.827	18.922	100	28
of it from Bangladesh	-	-	-	-	-	-
China	-	22	-	-	-	-
Ecuador	-	-	-	-	-	-
Indonesia	-	-	47	-	-	-
Kenya	-	3.446	1.094	1.588	8	45
Thailand	-	11	-	-	-	-
Tanzania	-	14.917	10.625	13.556	72	28
Uganda	-	4.142	2.953	3.777	20	28
Vietnam	-	111	107	-	-	-100
Zimbabwe	-	-	-	-	-	-
Supply (Catches + Import)	-	70.238	61.631	65.926	100	7
of it catches of quoted species	-	-	-	-	-	-
import from third countries	-	70.238	61.631	65.926	100	7
of it from Tanzania	-	36.166	33.342	33.942	51	2
Uganda	-	26.014	21.897	25.159	38	15
Kenya	-	3.446	1.094	1.588	2	45
Vietnam	-	111	107	-	-	-100
Indonesia	-	-	47	-	-	-
China	-	22	-	-	-	-
Zimbabwe	-	5	-	-	-	-

Note: a) No separate import figures are available.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2013

Tab. 4.16 Origin of imports into EU from third countries for tilapia

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009 a)	2010	2011	2012	2012	12/11
Whole, fresh	-	75	85	2	100	-98
of it from Bangladesh	-	-	-	-	-	-
China	-	22	56	-	-	-100
Ecuador	-	8	8	1	33	-94
Indonesia	-	-	-	-	-	-
Kenya	-	-	-	-	-	-
Thailand	-	14	10	-	-	-100
Tanzania	-	-	-	-	-	-
Uganda	-	-	-	-	-	-
Vietnam	-	30	11	-	-	-100
Zimbabwe	-	22	56	-	-	-100
Fillet, frozen	-	42.139	42.008	35.429	100	-16
of it from Bangladesh	-	-	-	-	-	-
China	-	37.159	36.206	31.049	88	-14
Ecuador	-	142	147	116	0	-21
Indonesia	-	3.380	3.774	2.976	8	-21
Kenya	-	-	-	-	-	-
Thailand	-	937	699	389	1	-44
Tanzania	-	-	13	-	-	-
Uganda	-	-	-	160	0	-
Vietnam	-	362	944	332	1	-65
Zimbabwe	-	3	-	-	-	-
Supply (Catches + Import)	-	42.214	42.093	35.430	100	-16
of it catches of quoted species	-	-	-	-	-	-
import from third countries	-	42.214	42.093	35.430	100	-16
of it from China	-	37.181	36.262	31.049	88	-14
Indonesia	-	3.380	3.774	2.976	8	-21
Thailand	-	951	709	389	1	-45
Vietnam	-	393	955	332	1	-65
Uganda	-	-	-	160	1	-
India	-	-	-	118	0	-
Ecuador	-	150	154	116	0	-25
Tanzania	-	-	13	-	-	-

Note: a) No separate import figures are available.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2013

Tab. 4.17 Overview of the adjusted rates of conversion

	COD		POK		RED		AP		SAL		Freshwater fish		PANGASIU		SURIMI		TUNA		
	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	
Whole, fresh		1,17		1,19		1,07		1,16		1,15		1,00							
Whole, frozen	1,50	1,71		1,51		1,93	1,71	1,51		1,15		1,00							
Fillet, fresh of it from China Vietnam	2,90	3,48		2,73		3,37				2,50		2,22		2,22					
									2,27										
											3,33			3,33					
Fillet, frozen of it from China Russia USA Vietnam	2,20	2,95		2,43		3,00		2,95		2,50		2,22		2,22					
			2,22		2,78				2,27			2,02							
							2,38												
							3,70												
							3,70												
											3,33			3,33					
Meat, fresh of it from Vietnam												2,22							
											3,33								
Meat, frozen of it from China Vietnam	2,40	2,64		2,12		2,34		2,64				2,22							
												2,02							
												3,33							
Fillet, dry / salted	4,31	4,31																	
Fish, dry / salted	6,60	8,33																	
Fish, dry / salted	3,65	4,00																	
Fish, salted	2,55	2,74								2,55									
Fillet, salted										4,00									
Whole, smoked										1,70									
Piece, prepared										2,55									
Prepared										2,00								1,74	2,00
Surimi																4,55	7,50		
Surimi, prepared																4,55	6,33		

Source: Own estimations of AIPCE experts.-

Published by: AIPCE 2013

Tab. 5.1 Origin of imports into EU from third countries for salmon a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh	544.576	555.809	602.806	696.891	100	16
of it from Canada	201	67	124	124	0	0
Chile	-	-	7	50	0	-
Faroe Isles	24.850	22.967	38.421	42.615	6	11
Iceland	3	13	-	192	0	-
Norway	519.196	532.596	564.159	653.804	94	16
USA	288	126	95	71	0	-26
Whole, frozen	15.184	14.886	14.201	20.348	100	43
of it from Canada	1.593	703	738	992	5	34
Chile	2.194	430	334	1.355	7	306
China	767	1.622	1.330	735	4	-45
Faroe Isles	693	144	24	-	-	-100
Iceland	-	6	-	15	0	-
Norway	2.377	3.634	3.203	4.988	25	56
Thailand	76	168	24	-	-	-100
USA	20.741	21.619	18.733	12.258	60	-35
Fillet, fresh	91.801	105.649	108.272	145.357	100	34
of it from Canada	257	100	171	118	0	-31
Chile	267	55	310	1.206	1	289
China	426	604	344	1.603	1	366
Faroe Isles	71	1	-	495	0	-
Iceland	2	2	-	8	0	-
Norway	90.689	104.835	107.393	141.808	98	32
USA	90	51	51	58	0	13
Fillet, frozen	191.912	181.025	170.214	167.756	100	-1
of it from Canada	666	619	597	474	0	-21
Chile	53.652	17.176	24.061	30.184	18	25
China	74.380	92.826	83.231	65.147	39	-22
Faroe Isles	14.401	16.624	16.242	19.088	11	18
Iceland	215	168	85	2	0	-98
Norway	40.258	41.585	35.545	43.225	26	22
Thailand	626	641	309	218	0	-29
USA	5.140	7.602	7.840	8.233	5	5
Salmon prepared	47.354	57.018	48.761	41.783	100	-14
of it from Canada	8.761	13.541	8.285	9.258	22	-
Chile	1.551	354	161	268	1	67
China	1.046	3.319	3.921	3.582	9	-9
Färöer	-	13	-	-	-	-
Iceland	28	16	14	99	0	-
Norway	2.084	1.617	1.313	1.092	3	-17
Thailand	3.137	3.527	1.907	1.767	4	-7
USA	30.199	34.092	32.929	24.998	60	-24
Supply (Catches + Import)	891.556	915.003	944.823	1.072.715	100	14
of it catches of quoted species	730	616	569	579	0	2
import from third countries	890.826	914.387	944.254	1.072.136	100	14
of it from Norway c)	654.603	684.266	711.612	844.917	79	19
China c)	76.620	98.392	88.826	71.066	7	-20
Faroe Isles	40.014	39.748	54.687	62.197	6	14
USA	56.456	63.489	59.648	45.617	4	-24
Chile c)	57.664	18.015	24.873	33.063	3	33
Canada	11.477	15.031	9.915	10.966	1	11
Thailand	3.840	4.336	2.240	1.985	0	-11
Russia c)	554	2.675	1.951	853	0	-56

Notes: a) Salmon salar and other salmon species.- b) Selected countries, which are most important for EU supply with white fish.- c) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 5.2 Origin of imports into EU from third countries for tuna

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Live b)	515	1.179	-	402	100	-
Whole, fresh	6.368	5.200	5.683	4.720	100	-17
of it White Tuna (Th. alalunga)	1.415	952	830	354	100	-57
of it from Ecuador	-	-	-	-	-	-
of it Yellow Tuna (Th. albacares)	4.419	3.688	4.367	3.942	100	-10
of it from Maldives	1.282	972	3.128	3.250	82	4
of it Bonito	111	32	125	21	100	-84
of it Big-eye Tuna (Th. obesus)	17	50	39	29	100	-27
of it Red Tuna b)	324	428	147	216	100	47
of it other Tuna species	82	50	174	158	100	-9
Whole, frozen	162.663	195.584	205.870	200.490	100	-3
of it White Tuna (Th. alalunga)	27.940	21.657	30.038	20.610	100	-31
of it from South Africa	6.663	8.631	5.244	5.733	28	9
USA	8.030	5.747	4.501	5.461	26	21
Thailand	1.033	-	1.070	144	1	-
of it Yellow Tuna (Th. albacares)	102.603	123.979	125.034	125.702	100	1
of it from Thailand	31.285	1.638	3.496	5.655	4	62
Phillipines	8.183	23.215	17.405	12.145	10	-30
Panama	8.999	5.518	8.731	6.889	5	-21
Mexico	4.365	20.736	28.593	25.344	20	-11
Kap Verde	4.209	6.608	5.562	4.532	4	-19
of it Bonito	27.404	41.615	40.303	45.972	100	14
of it from Panama	198	7.449	10.559	8.257	18	-22
Guatemala	4.264	4.336	2.986	3.928	9	32
Kap Verde	3.467	5.062	5.407	6.117	13	13
of it Big-eye Tuna (Th. obesus)	4.266	7.822	9.863	7.589	100	-23
of it from Seychelles	1.716	950	1.772	1.072	14	-40
of it Red Tuna b)	-	37	1	-	-	-100
of it other Tuna species	449	473	631	347	100	-45
of it from Panama	45	183	138	-	-	-100
Fillets, fresh d)	59.166	57.694	57.593	39.088	100	-32
of it from Sri Lanka	15.167	14.136	14.136	8.033	21	-43
Fillets, frozen	19.915	19.923	24.308	26.335	100	8
of it from Sri Lanka	4.826	3.228	3.228	-	-	-100
Vietnam	5.377	7.593	9.523	9.277	35	-3
Tuna, loins	296.027	276.532	288.865	269.475	100	-7
of it from Ecuador	119.312	98.236	96.252	90.384	34	-6
Thailand	44.666	32.148	43.343	20.928	8	-52
Mauritius	34.952	33.197	30.947	30.867	11	0
Tuna, prepared	659.565	646.772	677.748	647.206	100	-5
of it from Ecuador	111.409	108.127	124.417	128.182	20	3
Thailand	109.552	116.631	130.290	80.936	13	-38
Phillipines	94.036	79.006	61.959	53.758	8	-13
Mauritius	61.902	77.125	76.610	81.513	13	6
Supply (Catches + Import)	1.187.334	1.176.066	1.244.070	1.190.040	100	-4
of it catches of EU quoted tuna	42.282	30.876	41.596	41.413	3	0
import from third countries	1.145.052	1.145.190	1.202.474	1.148.627	97	-4
of it from Ecuador c)	233.751	213.513	231.207	225.382	20	-3
Mauritius c)	97.582	111.162	113.588	119.034	10	5
Thailand c)	187.060	150.992	178.577	107.728	9	-40
Seychelles c)	88.278	79.162	80.983	81.678	7	1
Phillipines c)	103.254	103.639	83.594	69.765	6	-17
Ivory Coast c)	57.942	58.890	48.657	65.112	6	34
Ghana c)	58.952	59.846	54.573	56.031	5	3
Vietnam c)	26.805	23.151	28.762	34.633	3	20
Columbia c)	31.610	27.090	32.718	25.805	2	-21
Guatemala c)	24.523	32.587	26.115	32.337	3	24

Notes: a) Selected countries, which are most important for EU supply with tuna.- b) Thunnus thynnus, orientalis and Thunnus maccoyii.-
c) Incl. quantities not listed above.- d) Estimation.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 5.3 Origin of imports into EU from third countries for herring a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh	72.582	59.549	24.980	28.130	100	13
of it from Faroe Isles	13.290	20.702	3.349	309	1	-91
Norway	59.292	38.847	21.631	27.819	99	29
Whole, frozen	53.245	60.235	55.794	43.243	100	-22
of it from Canada	1.107	449	905	282	1	-69
China	-	-	-	-	-	-
Faroe Isles	1.048	5.822	9.751	4.708	11	-52
Iceland	2.505	3.914	1.918	1.506	3	-21
Norway	48.190	49.050	40.130	33.463	77	-17
USA	394	902	2.457	3.078	7	25
Herring flaps, fresh	3.088	3.568	4.373	4.074	100	-7
of it from Norway	3.088	3.567	4.373	4.070	100	-7
Herring fillets, frozen	100.795	106.540	109.548	90.882	100	-17
of it from Canada	45	-	-	86	0	-
Faroe Isles	90	1.598	1.141	2.521	3	121
Iceland	21.865	29.390	30.012	23.161	25	-23
Norway	78.766	75.539	78.349	65.112	72	-17
Herring flaps, frozen	173.744	185.596	164.529	123.306	100	-25
of it from Canada	13.003	2.902	7.490	2.339	2	-69
Faroe Isles	11.070	13.907	9.959	6.372	5	-36
Iceland	47.835	47.902	37.167	27.084	22	-27
Norway	101.835	120.822	109.913	87.511	71	-20
Herring, smoked	1.809	1.501	1.447	865	100	-40
of it from Canada	1.615	1.309	1.299	771	89	-41
China	96	118	10	-	-	-100
Norway	89	73	93	93	11	-1
Herring, salted	2.017	1.984	1.187	1.206	100	2
of it from Canada	26	56	-	-	-	-
Norway	1.990	1.927	1.187	1.206	100	-
Herring presentations, others	34.654	40.564	39.625	32.160	100	-19
of it from Iceland	1.966	1.583	600	906	3	51
Norway	32.680	39.091	38.820	31.382	98	-19
Russia	39	-	3	-	-	-
Supply (Catches + Import)	1.024.727	909.107	937.782	986.559	100	5
of it catches of EU quoted herring	582.794	449.570	536.298	662.693	67	24
import from third countries	441.933	459.537	401.484	323.866	33	-19
of it from Norway	325.929	328.916	294.496	250.656	77	-15
Iceland	74.172	82.788	69.697	52.657	16	-24
Faroe Isles	25.498	42.029	24.201	13.911	4	-43
Canada	15.796	4.717	9.693	3.479	1	-64
USA	394	902	2.457	3.078	1	25
China	96	118	10	-	-	-100
Russia	39	-	3	-	-	-

Notes: a) Clupea harengus and clupea pallasii.- b) Selected countries, which are most important for EU supply with herring.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 5.4 Origin of imports into EU from third countries for mackerel a)

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Whole, fresh	7.104	11.605	3.776	18.035	100	378
of it from Faroe Isles	514	866	1.111	-	-	-100
Norway	6.555	10.723	2.653	18.021	100	-
Whole, frozen	42.931	41.945	66.322	72.135	100	9
of it from Argentina	515	2	6	-	-	-100
Canada	2.692	4.643	2.865	318	0	-89
China	776	886	2.429	2.470	3	2
Ecuador	379	55	24	-	-	-100
Faroe Isles	1.100	10.958	34.137	35.833	50	5
Iceland	164	2.696	9.981	8.402	12	-16
Morocco	1.500	930	2.575	3.031	4	18
Norway	20.633	19.180	12.514	19.798	27	58
Peru	6.889	118	466	197	0	-58
Thailand	193	20	1	-	-	-
USA	4.103	1.211	25	930	1	-
Fillets, frozen c)	5.174	6.935	7.769	7.350	100	-5
of it from China	1.217	1.461	1.779	1.347	18	-24
India	27	34	8	0	0	-95
Norway	3.826	5.196	4.484	4.658	63	4
Vietnam	39	41	39	5	0	-88
Smoked	45	123	5	7	100	30
of it from China	44	106	-	2	23	-
Norway	1	5	3	2	27	-30
Prepared d)	26.028	23.224	30.634	29.257	100	-4
of it from Albania	37	11	19	7	0	-64
Chile	1.022	161	-	-	-	-
China	1.023	2.110	3.085	2.650	9	-14
Kap Verde	1.740	2.261	5.460	4.409	15	-19
Ecuador	628	611	631	721	2	14
Morocco	15.869	15.123	18.729	18.827	64	1
Norway	9	9	8	12	0	49
Peru	3.042	515	915	911	3	0
Thailand	2.362	2.195	1.442	1.548	5	7
Supply (Catches + Import)	498.447	488.112	463.026	378.762	100	-18
of it catches of EU quoted mackerel	417.164	404.280	354.521	251.978	67	-29
import from third countries	81.283	83.832	108.505	126.784	33	17
of it from Faroe Islands	1.614	11.869	35.275	35.833	28	2
Norway	24.468	24.385	17.006	24.468	19	44
Morocco	17.389	16.109	21.427	21.914	17	2
China	3.060	4.562	7.292	6.468	5	-11
Kap Verde	1.740	2.261	5.460	4.409	3	-19
Thailand	2.555	2.227	1.442	1.548	1	7
Peru	9.931	633	1.419	1.108	1	-22
USA	4.103	1.211	25	930	1	-
Ecuador	1.018	665	860	852	1	-1
Taiwan	1.227	312	681	321	0	-53
Canada	2.692	4.643	2.865	318	0	-89
Chile	1.172	161	-	-	-	-

Notes: a) *Scomber scombrus*, *S. australasicus* and *S. japonicus*.- b) Selected countries, which are most important for EU supply with mackerel.- c) Including frozen fillets of the species *Orcynopsis unicolor*.- d) Not including CN Code 1604 20 50.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 5.5 Origin of imports into EU from third countries for shrimp

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
Shrimp (Pandalidae), frozen	72.301	69.820	59.387	58.797	100	-1
of it from Greenland	56.088	55.213	51.469	45.567	77	-11
Shrimp (Crangon), frozen	105	222	39	6	100	-85
Rose Shrimp (Parapenaeus), frozen	7.456	8.267	11.611	12.111	100	4
of it from Morocco	4.484	3.440	4.584	3.908	32	-15
Senegal	593	1.466	3.367	4.829	40	43
Shrimp (Penaeus spp.), frozen	350.298	361.127	339.655	308.259	100	-9
of it from Ecuador	75.367	85.858	94.923	90.544	29	-5
India	39.781	37.509	42.176	46.696	15	11
Bangladesh	28.562	30.972	32.212	33.310	71	3
Shrimp, other species, frozen	125.900	122.469	144.717	132.457	100	-8
of it from Argentina	21.680	30.522	52.992	53.735	41	1
China	36.332	33.086	31.528	28.109	21	-11
Shrimp (Pandalidae), not frozen	1.555	890	735	12	100	-98
of it from Morocco	97	101	101	1	12	-99
Shrimp (Crangon), fresh or cooked	161	234	22	1	100	-93
of it from Morocco	130	216	21	-	-	-100
Shrimp (Crangon) other than ¹⁾	0	1	11	-	-	-100
of it from Morocco	-	-	11	-	-	-100
Shrimp, other species, not frozen	319	418	381	289	100	-24
of it from China	61	26	58	74	26	27
Shrimp, prepared/preserved	376.462	391.519	390.061	361.624	100	-7
of it from Thailand	65.689	75.783	74.087	72.573	100	-2
Greenland	67.596	66.751	63.379	59.605	16	-6
Canada	67.264	63.762	62.219	63.413	87	2
Vietnam	26.432	31.917	38.300	33.060	46	-14
Morocco	25.339	28.734	28.541	25.096	42	-12
Shrimp, smoked	-	-	-	468	100	-
of it from China	-	-	-	134	29	-
Supply (Catches + Import)	948.889	965.713	974.609	883.080	100	-9
of it catches of EU quoted shrimp ²⁾	14.332	10.747	27.990	9.057	1	-68
import from third countries	934.557	954.966	946.619	874.023	99	-8
of it from Greenland b)	123.683	121.964	115.203	105.172	12	-9
Ecuador b)	82.725	92.865	108.084	103.525	12	-4
Thailand b)	98.417	121.672	112.922	101.682	12	-10
Canada b)	76.993	71.694	67.333	70.221	8	4
India b)	81.674	74.715	72.063	69.845	8	-3
Argentina b)	55.504	65.380	72.580	64.250	7	-11
Vietnam b)	56.386	64.139	71.627	56.810	6	-21
Bangladesh b)	43.397	45.069	47.264	47.340	5	0
China b)	50.774	55.091	53.005	42.127	5	-21
Morocco b)	30.957	33.491	34.245	29.673	3	-13
Indonesia b)	47.340	41.858	33.996	15.853	2	-53
Iceland b)	30.094	30.341	25.119	15.036	2	-40
Nicaragua b)	10.159	9.743	10.934	12.959	1	19
Honduras b)	16.448	11.962	12.223	10.672	1	-13
Madagascar b)	10.293	9.764	9.332	9.170	1	-2
USA b)	1.865	3.084	7.190	7.741	1	8
Senegal b)	3.374	3.855	5.870	6.466	1	10
Nigeria b)	5.100	4.771	4.713	4.192	0	-11
Mozambique b)	6.561	7.665	6.543	2.466	0	-62
Venezuela b)	10.019	8.313	9.949	288	0	-97

Notes: a) Selected countries, which are most important for EU supply with shrimp.- b) Incl. quantities not listed above.-

1) Fresh, chilled or cooked.- 2) Only quota for Pandalus borealis.-

Source: Eurostat-Comext; EU catch report.-

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Tab. 5.6 Origin of imports into EU from third countries for cephalopods

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2009	2010	2011	2012	2012	12/11
SQUID total	185.845	221.222	202.827	205.327	44	1
of it Loligo, frozen	149.078	182.431	163.016	165.340	100	1
of it L. patagonico	21.257	40.304	24.245	42.166	100	74
of it from Falkland Isles	18.140	37.628	20.891	38.240	91	83
of it L. vulgaris	12.030	9.441	9.799	6.787	100	-31
of it from Morocco	3.073	3.066	4.447	3.745	55	-16
of it L. pealei	963	726	1.332	1.399	100	5
of it from USA	951	726	1.291	1.374	98	6
of it other loligo	114.827	131.961	127.640	114.989	100	-10
of it from India	27.446	42.840	38.256	36.988	32	-3
Thailand	26.165	24.061	24.433	21.249	18	-13
of it other squid (Pota and Poton) c)	24.877	26.304	34.598	34.347	100	-1
of it from China	5.924	11.263	14.817	14.025	41	-5
Squid, fresh	2.343	1.612	1.087	1.162	100	7
Squid, prepared	9.547	10.876	4.126	4.478	100	9
ILLEX frozen total	51.277	57.509	38.732	42.118	9	9
of It from Argentina	33.110	27.571	18.821	23.836	57	27
China	11.384	23.832	12.472	7.949	19	-36
CUTTLE FISH total	71.699	67.885	60.963	49.132	11	-19
of it sepiola, frozen	69.508	66.767	59.938	47.973	100	-20
of it S. rondeleti	145	91	197	368	1	87
of it excluding S. rondeleti	10.926	8.859	6.578	1.820	4	-72
of it from Morocco	3.678	5.301	3.704	364	20	-90
of it other species	58.438	57.817	53.163	45.785	100	-14
of it from India	24.421	20.749	16.899	10.738	23	-36
Morocco	12.126	9.888	11.653	16.403	36	41
Cuttle fish, fresh	760	653	770	920	100	20
Cuttle fish, prepared	1.432	465	255	239	100	-6
OCTOPUS total	104.530	84.175	90.806	77.004	17	-15
of it octopus frozen	103.662	83.700	90.353	76.553	100	-15
of It from Morocco	39.191	28.629	20.544	22.828	30	11
Mexico	6.623	12.427	13.603	6.502	8	-52
Senegal	7.466	4.429	8.437	8.465	11	0
of it octopus, fresh	777	344	269	417	100	55
of it octopus, prepared	92	131	183	34	100	-81
Other frozen Cephal. , frozen d)	65.963	79.855	103.704	90.923	20	-12
of It from Peru	32.029	36.590	44.694	40.886	45	-9
India	13.730	15.971	19.126	18.503	20	-3
Supply (Catches + Import)	479.315	510.646	497.032	464.505	100	-7
of it catches of EU quoted cephalopods	-	-	-	-	-	-
import from third countries	479.315	510.646	497.032	464.505	100	-7
of it from India b)	74.140	87.278	83.731	72.638	16	-13
Peru b)	51.543	57.217	59.739	65.764	14	10
China b)	45.684	73.029	63.460	55.360	12	-13
Falkland Isles b)	34.344	51.438	36.743	52.617	11	43
Morocco b)	63.818	50.234	43.881	46.909	10	7
Thailand b)	39.414	33.775	32.715	29.040	6	-11
Argentina b)	33.369	27.983	19.078	24.029	5	26
Vietnam b)	23.606	25.692	26.464	23.641	5	-11
Chile b)	1.735	5.651	16.662	15.710	3	-6
USA b)	11.926	9.878	15.145	13.641	3	-10
Mauretania b)	24.162	10.654	10.838	12.943	3	19
Senegal b)	11.329	8.173	12.952	11.375	2	-12
Indonesia b)	7.245	10.107	13.118	11.347	2	-13
Tunisia b)	5.434	9.036	12.992	10.084	2	-22
Mexico b)	10.119	14.814	14.017	7.172	2	-49

Notes: a) Selected countries, which are most important for EU supply with cephalopods.- b) Incl. quantities not listed above.-

c) Pota= i.e. Todarous pacificus, Poton=i.e. Dosidicus gigas.- d) includ. Pota and Poton.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2013

Tab. 6.1 EU-Quota by species

Species	Code-name	EU (25)		EU (27)			Change 12/11	Quota '12 by species
		2008	2009	2010	2011	2012 a)		
		tonnes						
Herring	HER	784.620	617.041	600.720	639.533	776.656	21,4	24,5
Sprat	SPR	705.066	617.725	584.427	513.762	441.462	-14,1	13,9
Anchovy	ANE	8.000	8.000	30.600	38.142	28.696	-24,8	0,9
Atl. Salmon	SAL	1.899	1.626	1.548	1.328	690	-48,1	0,0
Cod	COD	127.245	138.779	158.351	162.310	186.398	14,8	5,9
Haddock	HAD	69.179	60.501	52.239	53.331	67.258	26,1	2,1
Saithe	POK	90.310	83.429	71.250	61.351	53.451	-12,9	1,7
Pollack	POL	17.980	17.980	16.211	15.887	15.835	-0,3	0,5
Norway pout	NOP	115.000	117.750	76.000	4.500	75.750	-	2,4
Blue whiting	WHB	420.784	146.593	130.014	22.912	80.272	250,4	2,5
Greater forkbeard	GFB	2.551	2.380	2.380	2.560	2.547	-0,5	0,1
Whiting	WHG	40.496	34.836	30.275	35.608	41.703	17,1	1,3
Hake b)	HKE	71.646	64.604	67.934	75.386	76.939	2,1	2,4
Jack&horse macke.	JAX	286.125	264.219	263.717	274.609	267.066	-2,7	8,4
Mackerel	MAC	374.063	492.851	500.551	381.467	391.993	2,8	12,4
Europ. Plaice	PLE	72.202	75.239	81.912	90.016	100.563	11,7	3,2
Common sole / Sole	SOL	31.834	28.406	27.509	29.575	31.942	8,0	1,0
Megrim	LEZ	26.418	26.251	26.548	26.441	28.000	5,9	0,9
Anglerfish nei	ANF	58.166	56.222	61.348	63.193	63.474	0,4	2,0
Penaeus shrimps	PEN	4.108	4.108	4.108	-	3.317	-	0,1
North deep prawn	PRA	26.814	25.187	23.362	21.924	20.722	-5,5	0,7
Norway lobster	NEP	90.229	79.348	73.884	77.042	76.767	-0,4	2,4
Atl. Redfish	RED	32.205	33.414	36.348	29.444	29.579	0,5	0,9
Greenland halibut	GHL	17.848	17.706	17.601	17.355	16.329	-5,9	0,5
Atl. Halibut	HAL	1.200	1.150	1.075	1.150	1.275	10,9	0,0
other species	OTH	6.110	6.110	6.110	5.350	5.350	0,0	0,2
Sandeels	SAN	360.000	346.920	346.920	354.380	58.923	-83,4	1,9
Blue ling & ling	B/L	3.065	3.065	2.700	-	-	-	-
Blue ling	BLI	2.315	2.088	1.799	2.642	3.013	14,0	0,1
Ling	LIN	14.661	14.656	11.266	12.268	12.530	2,1	0,4
Flat fish	FLX	300	300	300	-	-	-	-
Capelin	CAP	-	-	-	56.364	56.364	0,0	1,8
Catfish	CAT	-	-	-	-	-	-	-
Witch flunder	WIT	-	-	-	-	-	-	-
American plaice	PLA	-	-	-	-	-	-	-
Yellow tail flounder	YEL	-	-	-	-	-	-	-
Roundnose grenad.	RNG	12.221	9.974	9.388	8.313	7.709	-7,3	0,2
Industry fish	I/F	800	800	800	800	800	0,0	0,0
Skates (NAFO)	SKA	-	-	-	-	5.352	-	0,2
Turbot / Brill	T/B	5.263	5.263	4.737	4.642	4.642	0,0	0,1
Skates (ICES)	SRX	10.143	33.427	28.744	27.756	18.297	-34,1	0,6
Dab / Flunder	D/F	18.810	18.810	18.810	18.434	18.434	0,0	0,6
Lemon Sole/Witch Flunder	L/W	6.793	6.793	6.521	6.391	6.391	0,0	0,2
Northern blue fin tuna	BFT	16.211	11.907	7.087	5.748	5.756	0,1	0,2
Albacore	ALB	38.965	40.108	29.832	29.832	28.479	-4,5	0,9
Bigeye tuna	BET	31.350	31.200	31.200	29.867	29.867	0,0	0,9
Swordfish	SWO	12.767	13.949	15.274	14.315	13.737	-4,0	0,4
Picked dogfish	DGS	2.585	1.372	142	5	-	-	-
Black scabbardfish	BSF	12.448	10.635	10.192	10.432	9.944	-4,7	0,3
Greater argentine	ARU	6.758	6.758	6.489	5.970	6.090	2,0	0,2
Tusk (=Cusk)	USK	887	888	705	732	734	0,3	0,0
Orange roughy	ORY	214	97	-	1	-	-	-
Blackspot(=red)seabream	SBR	2.629	2.307	2.131	2.318	2.355	1,6	0,1
Deep Sea Sharks	DWS	1.927	859	86	-	-	-	-
unserted species	VFF	-	-	-	-	-	-	-
Total:		4.043.210	3.583.631	3.481.145	3.235.386	3.173.452	-1,9	100,0

Tab. 6.1 EU-Quota by species

Species	Code-name	EU (25)			EU (27)			Change 12/11 %	Quota '12 by species %
		2008	2009	2010	2011	2012 a)			
		tonnes							
of which: (COD, POK, POL, HAD, WHB, HKE, RED)		829.349	545.300	532.347	420.621	509.732	21,2	16,1	

Notes: a) Preliminary figures.- b) Including red and white hake.-

Source: EU, TAC regulations.-
Published by: AIPCE 2013

Tab. 6.2 EU-Catches by quoted species

Species	Code-name	EU (25)		EU (27)			Change 12/11	Quota'12 by spec. % b)
		2008	2009	2010	2011	2012 a)		
		tonnes						
Herring	HER	559.044	582.794	449.570	536.298	662.693	23,6	85,3
Sprat	SPR	430.007	512.651	474.637	391.850	315.023	-19,6	71,4
Anchovy	ANE	3.298	2.725	12.777	23.255	21.803	-6,2	76,0
Atl. Salmon	SAL	606	730	616	569	579	1,8	84,0
Cod	COD	117.396	126.234	138.449	138.629	144.620	4,3	77,6
Haddock	HAD	47.133	50.117	46.711	46.291	52.215	12,8	77,6
Saithe	POK	64.904	53.247	52.362	53.549	47.986	-10,4	89,8
Pollack	POL	5.581	4.877	5.506	6.113	5.873	-3,9	37,1
Norway pout	NOP	30.963	18.633	66.924	3.733	23.181	521,0	30,6
Blue whiting	WHB	227.444	84.145	82.278	14.528	68.850	373,9	85,8
Greater forkbeard	GFB	1.882	1.607	1.621	1.630	1.526	-6,4	59,9
Whiting	WHG	25.839	26.792	28.604	29.231	28.400	-2,8	68,1
Hake c)	HKE	46.041	48.900	55.330	61.106	61.927	1,3	80,5
Jack&horse macke.	JAX	191.936	200.603	189.061	217.713	221.608	1,8	83,0
Mackerel	MAC	320.946	417.164	404.280	354.521	251.978	-28,9	64,3
Europ. Plaice	PLE	62.098	64.655	75.136	77.214	81.981	6,2	81,5
Common sole / Sole	SOL	24.885	24.214	24.032	21.168	22.733	7,4	71,2
Megrim	LEZ	14.997	16.537	17.275	15.438	16.899	9,5	60,4
Anglerfish nei	ANF	43.986	41.229	43.893	41.988	45.447	8,2	71,6
Penaeus shrimps	PEN	1.496	1.019	944	681	715	5,1	-
North deep prawn	PRA	11.612	14.332	10.747	27.990	9.057	-67,6	43,7
Norway lobster	NEP	65.554	62.242	58.107	37.555	51.978	38,4	67,7
Atl. Redfish	RED	17.071	20.199	25.186	19.856	15.458	-22,1	52,3
Greenland halibut	GHL	15.191	14.927	15.491	9.801	14.452	47,5	88,5
Atl. Halibut	HAL	53	96	-	124	2	-	0,1
other species	OTH	4.915	4.937	5.226	4.649	5.063	8,9	94,6
Sandeels	SAN	277.313	326.666	331.372	329.715	5.052	-98,5	8,6
Blue ling & ling	B/L	1.723	1.703	1.829	-	-	-	-
Blue ling	BLI	1.866	2.170	1.805	2.054	1.892	-7,9	62,8
Ling	LIN	8.406	8.560	9.608	9.492	9.556	0,7	76,3
Flat fish	FLX	89	84	275	-	-	-	-
Capelin	CAP	-	-	-	11.324	-	-	-
Catfish	CAT	170	197	-	198	-	-	-
Witch flunder	WIT	386	420	405	542	492	-9,3	-
American plaice	PLA	984	762	817	905	1.024	13,2	-
Yellow tail flounder	YEL	677	355	1.049	1.230	786	-36,1	-
Roundnose grenad.	RNG	5.337	4.543	5.885	5.959	4.730	-20,6	61,4
Industry fish	I/F	757	621	725	689	747	8,4	93,4
Skates (NAFO)	SKA	136	149	-	155	4.118	-	-
Turbot / Brill	T/B	3.804	4.001	3.918	3.714	4.257	14,6	91,7
Skates (ICES)	SRX	8.063	19.112	20.889	19.638	3.300	-83,2	18,0
Dab / Flunder	D/F	10.848	9.226	10.224	9.248	8.161	-11,8	44,3
Lemon Sole/Witch Flunder	L/W	3.550	2.595	2.515	3.100	2.866	-7,6	44,8
Northern blue fin tuna	BFT	11.153	11.043	6.047	5.673	5.682	0,2	98,7
Albacore	ALB	18.492	18.957	15.122	16.041	18.424	14,9	64,7
Bigeye tuna	BET	6.550	12.282	9.707	19.882	17.307	-13,0	57,9
Swordfish	SWO	10.146	11.419	11.168	10.544	11.362	7,8	82,7
Picked dogfish	DGS	790	1.244	263	15	14	-8,0	-
Black scabbardfish	BSF	9.716	8.646	7.716	8.030	6.615	-17,6	66,5
Greater argentine	ARU	3.026	1.827	2.998	3.062	2.360	-22,9	38,7
Tusk (=Cusk)	USK	620	479	435	464	371	-20,0	50,6
Orange roughy	ORY	104	37	-	1	0	-	-
Blackspot(=red)seabream	SBR	1.553	1.412	1.146	888	1.009	13,6	42,8
Deep Sea Sharks	DWS	1.342	793	165	56	12	-79,1	-
unserted species	VFF	132	94	-	143	-	-	-
Total:		2.722.611	2.845.003	2.730.846	2.598.242	2.282.183	-12,2	71,9

Tab. 6.2 EU-Catches by quoted species

Species	Code-name	EU (25)		EU (27)			Change 12/11	Quota'12 by spec.
		2008	2009	2010	2011	2012 a)		
		tonnes					%	% b)
of which: (COD, POK, POL, HAD, WHB, HKE, RED)		525.570	387.719	405.822	340.072	396.930	16,7	77,9

Notes: a) Preliminary figures.- b) % of utilization of the quota.- c) Including red and white hake.-

Source: EU catch report
Published by: AIPCE 2013

Tab. 6.3 Overview of selected fish quotas in the world

Species	2008	2009	2010	2011	2012	2013
	1.000 tonnes					
<u>Atlantic cod</u>						
Barents Sea / Norway / Russia	430	525	607	703	751	1.000
Norway Coast	21	21	21	21	21	21
Iceland	130	160	150	160	177	196
EU (27)	127	139	158	159	134 a)	167 a)
<u>Pacific cod</u>						
USA	220	218	228	293	326	321
Asia	132	135	135	125 b)	125 b)	125 b)
<u>Haddock</u>						
Barents Sea	155	194	243	303	318	200
Iceland	100	93	63	50	45	36
EU (27)	69	61	52	51	61	60
<u>Saithe</u>						
Barents Sea	247	225	204	173	164	140
Iceland	75	65	50	50	52	50
Faroes	57	58	44	29 b)	<40 c)	<30 c)
EU (27)	90	83	71	60	50 a)	56 a)
<u>Alaska pollock</u>						
Russia	1.420	1.441	1.652	1.620 b)	1.620 b)	1.600 b)
USA	1.071	884	915	1.367	1.336	1.387
<u>European hake</u>						
EU (27)	72	65	64	66	67	69
<u>Pacific hake</u>						
USA/Canada	365	184	262	393	255	365

Note: a) Adjusted for Barents Sea share.- b) Estimate.- c) Advised limit.-

Source: EU, ICES, NMFS, NCMC, PFMC.-

Published by: AIPCE 2013

Tab. 7.1 Import of frozen fillets and meat of Alaska-pollock and hake from third countries into EU (27)

Average import price €/KG; without duty) in 2010

Month	1	2	3	4	5	6	7	8	9	10	11	12
Alaska-Pollock												
Fillets a), frozen: Total import	2,28	2,26	2,24	2,42	2,44	2,52	2,57	2,47	2,48	2,38	2,29	2,31
from it: Germany	2,31	2,36	2,42	2,48	2,45	2,55	2,62	2,57	2,63	2,50	2,46	2,44
France	2,38	2,37	2,37	2,46	2,56	2,54	2,60	2,44	2,51	2,60	2,27	2,39
UK	2,26	2,27	2,28	2,55	2,46	2,63	2,47	2,47	2,38	2,27	2,28	2,22
NL	2,67	2,64	2,73	2,78	2,74	2,83	2,84	2,73	2,78	2,71	2,53	2,73
Spain	2,02	1,95	1,97	2,10	1,95	2,15	2,09	1,75	1,95	2,00	1,85	1,89
Denmark	2,34	2,52	2,46	2,86	2,64	2,90	2,98	2,88	2,77	2,79	2,66	3,09
Belgium	2,37	2,20	2,37	2,32	2,16	2,35	2,42	2,22	2,26	2,18	2,07	2,00
Sweden	2,54	2,36	2,34	2,71	2,66	2,71	2,66	2,58	2,69	2,49	2,33	2,52
Poland	1,63	1,48	1,49	1,66	1,97	1,92	1,91	1,71	1,68	1,52	1,50	1,56
Meat b), frozen: Total import	1,53	1,43	1,48	1,60	1,63	1,50	1,63	1,78	1,77	1,69	1,78	1,67
from it: Germany	1,52	1,31	1,15	1,42	1,37	1,31	1,33	1,55	1,62	1,65	1,68	1,56
France	1,36	1,42	1,54	1,61	1,61	1,70	1,73	1,67	1,70	1,63	1,64	1,72
UK	2,22	1,66	1,96	1,47	1,83	1,85	2,19	2,28	1,76	1,68	1,67	1,81
NL	1,25	1,49	2,80	2,13	-	1,78	-	2,47	3,02	2,07	2,39	1,75
Spain	1,68	1,58	1,71	1,80	1,48	1,76	1,92	1,74	1,80	1,76	1,42	1,53
Denmark	1,42	2,37	-	1,31	2,84	1,53	-	1,63	1,74	-	-	1,80
Poland	1,44	1,43	1,48	1,59	1,52	1,46	1,60	1,81	1,75	1,74	1,82	1,69
Hake												
Fillets c), frozen: Total import	2,57	2,50	2,70	2,84	3,00	2,92	3,15	3,01	2,98	2,97	2,94	2,86
from it: Germany	2,17	2,11	2,14	2,18	2,14	2,40	2,42	2,43	2,25	2,26	2,27	2,33
France	2,91	3,04	3,14	3,43	3,41	3,39	3,39	3,39	3,47	3,12	3,14	3,00
UK	2,76	2,88	2,57	2,63	3,89	2,72	2,99	3,46	3,20	2,90	3,03	3,27
NL	1,80	1,66	1,69	1,68	1,82	1,84	3,64	3,45	3,33	3,35	3,50	2,97
Spain	2,49	2,50	2,88	2,75	2,95	2,88	3,06	2,89	2,97	3,04	2,93	2,84
Poland	1,88	1,96	2,09	1,95	2,29	2,31	2,15	2,40	2,22	2,25	2,34	2,43
Italy	3,29	3,02	3,21	3,61	3,49	3,40	3,55	3,80	3,34	3,23	3,30	3,27
Meat d), frozen: Total import	1,73	1,86	1,89	1,98	1,86	1,78	1,84	1,88	1,92	1,99	1,78	1,75
from it: Germany	1,19	1,16	1,20	1,20	1,32	1,30	1,43	1,37	1,49	1,44	1,45	1,45
France	1,22	1,31	1,36	1,42	1,45	1,49	1,43	1,67	1,60	1,53	1,54	1,56
UK	-	0,97	-	-	-	-	0,93	-	1,37	1,02	1,07	-
NL	-	-	1,72	-	1,85	-	-	-	-	-	-	-
Spain	2,64	2,34	2,11	2,59	2,03	1,82	2,30	2,19	2,42	2,82	2,13	2,57
Poland	1,31	1,26	1,31	1,31	1,25	1,52	1,37	1,38	1,36	1,40	1,42	-
Italy	1,45	1,45	1,91	2,03	2,55	3,46	2,65	1,25	1,58	1,47	1,39	1,44

Note: a) CN: 03042985 (pinbone in and boneless).- b) CN: 03049975.- c) CN: 03042955, 03042956 and 03042958 (pinbone in and boneless).- d) CN: 03049951.-

Source: Eurostat-Comext; Published by: AIPCE 2013

Tab. 7.2 Import of frozen fillets and meat of Alaska-pollock and hake from third countries into EU (27)

Average import price €/KG; without duty) in 2011

Month	1	2	3	4	5	6	7	8	9	10	11	12
Alaska-Pollock												
Fillets a), frozen: Total import	2,39	2,38	2,40	2,28	2,14	2,17	2,13	2,15	2,07	2,21	2,15	2,18
from it: Germany	2,48	2,48	2,46	2,33	2,18	2,18	2,18	2,22	2,14	2,25	2,25	2,26
France	2,39	2,33	2,46	2,27	2,16	2,17	2,18	2,21	2,22	2,37	2,30	2,32
UK	2,42	2,33	2,25	2,24	2,20	2,26	2,24	2,22	2,14	2,20	2,14	2,34
NL	2,55	2,53	2,65	2,57	2,39	2,42	2,25	2,34	2,34	2,39	2,43	2,47
Spain	2,01	1,80	1,96	1,78	1,55	1,72	1,75	1,80	1,68	1,76	1,83	1,87
Denmark	2,45	2,83	2,93	2,64	2,62	2,44	2,70	2,52	2,46	2,54	2,49	2,51
Belgium	2,20	2,15	2,15	2,19	2,10	2,28	2,33	2,14	2,01	1,97	2,51	2,35
Sweden	2,65	2,62	2,57	2,35	2,38	2,43	2,29	2,40	2,45	2,59	2,58	2,58
Poland	1,84	1,83	1,67	1,71	1,56	1,67	1,60	1,51	1,40	1,74	1,48	1,54
Meat b), frozen: Total import	1,71	1,64	1,62	1,50	1,40	1,39	1,40	1,38	1,37	1,39	1,35	1,35
from it: Germany	1,62	1,67	1,63	1,51	1,37	1,35	1,33	1,33	1,32	1,32	1,29	1,28
France	-	-	-	-	-	-	1,28	1,35	1,21	1,35	1,28	1,36
UK	-	-	-	1,55	-	1,45	1,55	1,49	1,69	2,13	1,78	1,32
NL	-	2,13	-	1,48	-	1,45	-	1,39	1,66	-	1,30	1,50
Spain	-	1,68	-	-	1,62	1,50	1,63	-	-	1,57	-	-
Denmark	-	-	-	-	-	-	-	-	-	-	-	-
Poland	1,84	1,63	-	-	-	1,39	-	1,40	1,38	-	-	-
Hake												
Fillets c), frozen: Total import	2,98	2,95	3,02	3,08	3,20	3,18	3,16	3,22	3,16	3,06	3,23	3,18
from it: Germany	2,24	2,24	2,23	2,21	2,22	2,24	2,26	2,24	2,30	2,11	2,47	2,43
France	3,10	3,30	3,62	3,39	3,45	3,80	3,41	3,69	3,46	2,12	3,48	3,17
UK	3,71	3,48	2,80	3,04	3,17	3,14	3,04	3,05	3,68	3,03	3,61	3,61
NL	3,51	3,36	3,23	3,54	3,44	3,48	3,40	3,53	3,63	3,45	3,70	3,19
Spain	3,05	2,78	3,04	3,04	3,18	3,07	3,23	3,12	3,18	3,22	3,17	3,22
Poland	2,23	2,28	2,27	2,32	2,47	2,22	2,10	2,29	2,42	2,69	2,65	2,60
Italy	3,27	3,52	3,49	3,68	3,72	3,67	3,40	3,69	3,61	3,52	3,55	3,37
Meat d), frozen: Total import	1,89	1,81	1,91	2,21	1,82	1,92	1,69	2,08	1,94	2,11	2,30	2,36
from it: Germany	1,45	1,52	1,51	1,40	1,41	1,44	1,45	1,38	1,35	1,40	1,39	1,34
France	-	-	-	-	-	-	2,08	-	1,21	1,37	1,35	-
UK	-	-	-	-	-	-	1,11	-	-	1,15	-	-
NL	-	-	-	-	-	-	-	-	-	-	-	-
Spain	2,53	2,26	2,27	2,29	2,19	2,11	2,02	2,15	2,09	2,33	2,59	2,95
Poland	-	-	-	-	-	-	-	-	-	-	-	-
Italy	-	-	-	-	-	-	2,03	3,17	2,97	3,91	3,31	1,95

 Note: a) CN: 03042985 (pinbone in and boneless).- b) CN: 03049975.- c) CN: 03042955, 03042956 and 03042958 (pinbone in and boneless).- d) CN: 03049951.-
 Source: Eurostat-Comext; Published by: AIPCE 2013

Tab. 7.3 Import of frozen fillets and meat of Alaska-pollock and hake from third countries into EU (27)

Average import price €/KG; without duty) in 2012

Month	1	2	3	4	5	6	7	8	9	10	11	12
Alaska-Pollock												
Fillets a), frozen: Total import	2,30	2,35	2,29	2,31	2,29	2,38	2,36	2,40	2,36	2,30	2,26	2,27
from it: Germany	2,35	2,41	2,37	2,30	2,29	2,37	2,35	2,41	2,38	2,35	2,34	2,37
France	2,36	2,42	2,36	2,39	2,32	2,44	2,35	2,52	2,42	2,40	2,40	2,30
UK	2,39	2,35	2,38	2,40	2,31	2,48	2,51	2,58	2,37	2,31	2,31	2,26
NL	2,46	2,52	2,39	2,49	2,51	2,56	2,52	2,62	2,68	2,57	2,69	2,62
Spain	1,75	1,91	1,72	1,78	1,87	1,88	1,95	2,00	1,91	1,82	1,81	1,79
Denmark	2,74	2,70	2,62	2,64	2,69	2,69	2,72	2,94	2,82	2,66	2,91	3,04
Belgium	2,33	2,33	1,79	2,06	2,10	2,11	2,27	2,23	2,00	2,13	2,03	2,18
Sweden	2,70	2,60	2,47	2,45	2,57	2,78	2,79	2,75	2,31	2,74	2,85	2,63
Poland	1,74	1,77	1,65	1,84	1,92	2,20	2,03	1,96	1,85	1,73	1,61	1,47
Meat b), frozen: Total import	1,67	1,49	1,40	1,57	1,54	1,52	1,58	28,26	33,52	1,50	1,51	1,51
from it: Germany	1,29	1,30	1,32	1,32	1,36	1,50	1,43	1,45	1,45	1,38	1,50	1,36
France	-	-	-	-	-	-	1,64	1,68	1,60	1,52	1,48	1,48
UK	-	-	-	1,48	-	1,58	1,62	1,75	1,83	1,68	1,75	1,61
NL	-	1,56	1,52	1,50	-	1,57	-	-	1,57	1,46	1,42	1,42
Spain	-	1,77	-	-	1,84	1,54	1,47	-	-	1,47	-	-
Denmark	-	-	-	-	-	-	-	-	-	-	-	-
Poland	1,56	1,60	-	-	-	1,52	-	1,55	1,46	-	-	-
Hake												
Fillets c), frozen: Total import	3,08	3,15	3,21	3,43	3,38	3,41	3,32	3,30	3,31	3,27	3,23	3,44
from it: Germany	2,34	2,40	2,39	2,43	2,52	2,69	2,53	2,47	2,63	2,35	2,70	2,54
France	3,43	3,61	3,10	3,70	3,84	3,83	3,85	4,02	3,58	3,61	3,93	3,81
UK	2,97	3,12	3,69	3,95	3,29	3,45	3,24	3,29	2,28	3,22	2,88	3,27
NL	3,38	3,70	3,57	3,69	3,60	3,62	3,60	3,38	3,72	3,45	3,57	2,98
Spain	3,13	3,23	3,36	3,30	3,21	3,24	3,15	3,20	3,23	3,21	3,00	3,28
Poland	2,54	2,71	2,67	2,62	2,61	2,72	2,62	2,58	2,53	2,52	2,62	2,72
Italy	3,65	3,20	3,40	4,27	4,06	4,07	3,69	3,67	3,73	3,76	3,76	4,02
Meat d), frozen: Total import	1,67	1,75	1,95	1,94	2,34	2,51	2,15	2,26	2,26	2,06	1,90	2,08
from it: Germany	1,35	1,38	1,39	1,35	1,53	1,42	1,46	1,47	1,48	1,42	1,36	1,41
France	-	-	-	-	-	-	1,14	-	1,60	1,44	1,42	-
UK	-	-	-	-	-	-	0,94	-	-	2,14	-	-
NL	-	-	-	-	-	-	-	-	-	-	-	-
Spain	2,22	2,24	2,34	2,47	2,45	3,01	2,40	2,54	2,70	2,30	2,41	2,60
Poland	-	-	-	-	-	-	-	-	-	-	1,41	-
Italy	-	-	-	-	-	-	2,42	3,26	1,45	2,56	1,39	2,55

 Note: a) CN: 03047500 (pinbone in and boneless).- b) CN: 03049490.- c) CN: 03047411, 03047415 and 03047419 (pinbone in and boneless).- d) CN: 03049550.-
 Source: Eurostat-Comext; Published by: AIPCE 2013