FINFISH STUDY 2012

A.I.P.C.E.-C.E.P

EU Fish Processors and Traders Association
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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.

AIPCE-CEP and its members use the Finfish Study at EU and member state level to exemplify the need for imported seafood, particularly whitefish to produce added value seafood within Europe. These have been the lifeblood of the industry for many years and fulfill an essential role.

This study is prepared for the processing industry in Europe but other independent studies have validated the findings and conclusions making this relevant and valuable voice for our industry.

For over 20 years the annual report by AIPCE-CEP of the trends in supplies of whitefish/finfish has reflected the significance of growth in consumer demand for seafood products and how the market constantly adapts to the challenges it faces. These take many forms reflecting not just changing circumstances in EU supplies but also extending well beyond our boundaries.

Competition for fish and seafood is now on a global stage.

The emergence of major new species resources from both wild capture fisheries and aquaculture has transformed the markets and brought stability and reward for investment opportunities. Without these introductions the ability of the processing sector to grow and respond to consumer needs and expectations would have been considerably more difficult or likely not possible.

This diversification has created many new challenges that processors have had to respond to but that also concerns all stakeholders including consumers. Issues surrounding legality of supply and other matters of international trade have been addressed both voluntarily by the industry and through enhanced regulation and control.

Sustainability, ethical trading and the like are still largely addressed by private initiative but consumer, government and society maintain growing interest in these subjects.

AIPCE-CEP has been pro-active in leading the dialogue and taking the necessary actions to ensure our supply bases meets expectations of stakeholders and consumers whilst providing a regular, consistent and price competitive offering.

The Finfish Study provides insight into the effects of these changes and developments in the market.

2. Overview of the Study Findings

All figures in this study are calculated at Whole Fish Equivalent (WFE). Further details are outlined in chapter 3. Previous years figures are corrected following publication of official 2009 figures of FAO and EU.

Key Findings:

- **Total market supply has stayed static at 14.7 million tonnes**
- **Imported share has grown to 9.548 million tonnes and equals 65 %**
- **Whitefish import dependency has stayed level at 89 % for wild capture and > 91 % including aquaculture products**
- **EU catches estimated to have reduced to 4.821 million tonnes (inc. non-food use)**
- **Exports have moved down by 13.7 % to 1.870 million tonnes**
- **Cod is no. 1 whitefish species moving above 1 million tonnes**
- **Alaska pollock back to no. 2 with growth of 18 %**
- **Global quota trends are positive**

2.1 Data Base

This report is mainly based on statistics taken from Eurostat 2011 data and refers to the entire EU 27 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. All tables and figures presented refer to this unit of measure.

The main focus of the Finfish Study is whitefish and has sought to capture the emergence of alternative resources such as freshwater cultivated species of pangasius and tilapia. However, the fish industry relies on a much broader selection of species and types so we have expanded the data base to include salmon, tuna, pelagics and Surimi as well as shrimp and cephalopods.

The interaction between all of these species and formats is complex but by including the statistics we are hoping to demonstrate the scale and complexity of the fish and seafood industry and the important role that the EU market plays in global terms.

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.

We continue to refine the accuracy of the data presented in particular the estimates for non-food use catches and also aquaculture numbers. We are disadvantaged by the data not always being updated at the time of writing. The FAO global fishery product statistical publication is three years behind but does capture all activity. The EU member states are responsible for their individual submissions but again these are not always submitted promptly and so we try and estimate the contemporary numbers to help keep the meaning relevant. As a consequence we have had to revise last year's estimates and make comment on the effects of this.

2.2 Key Finding From Statistical Analysis

The study is looking back at the statistics of the previous complete year but wherever we can, we try and highlight the latest trends if there are significant changes happening.

After correcting for the allocation of captured fish to non-food uses and revising the aquaculture output for the last 3 years we see a flat supply of 14.671 million tonnes in 2011 all but identical to

2010 (previous years figures are adjusted following publication of official 2009 figures of FAO and EU). Net

consumption appears to have risen by just over 300,000 tonnes to 13 million tonnes representing a 2.4 % improvement (see tab. 4.1).

Contribution from the EU catch has marginally reduced although across the species complex there are quite significant positive and negative changes.

We have had to correct our estimated aquaculture figures from previous years and these now show less than we had previously published.

Imports continue to be the majority part of the market and have risen slightly to 9.548 million tonnes (up 1.5 %). Overall reliance has moved up slightly to 65 %.

Exports from the EU fell back by 300,000 tonnes reflecting the change in the species mix complex of which Northern Blue Whiting is probably the most significant indi-vidual change.

This ongoing dependence on imports has been stable since the expansion of the EU to 27 states at a level of 63 % +/- 2 %. After taking into account the export requirements for some product types (eg pelagics) the specific dependence of certain key sectors is actually much higher. Later in this study we highlight the self-sufficiency in several of the key species consumed in the EU.

2.3 Costs

2011 once again proved a difficult year for managing costs as a catcher or processor.

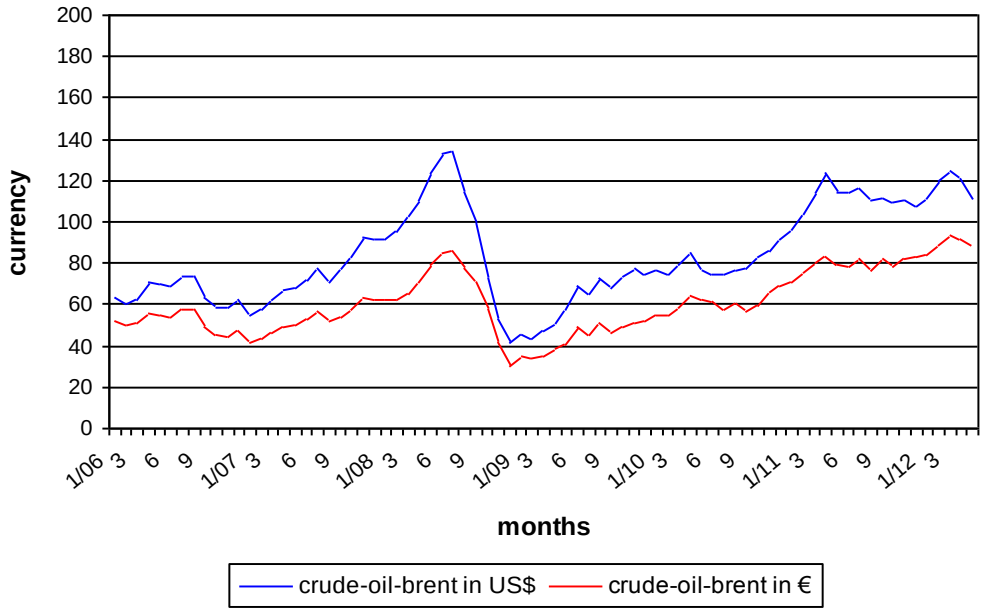
During 2011 the $/€ fluctuated in a range between 1.30-1.40 and more or less ended up as it began. However unlike 2010 the Euro was on average a stronger currency particularly in the two middle quarters of the year. Seasonal negotiations during this period were helped by this as buyers could manage their exposure against firm contracts.

As fish is a truly globally traded material we also need to be mindful of the exchange fluctuations of other major trading regions. Of particular importance is Japan where the Yen has been in an extended period of strength versus the Dollar and indeed most other currencies. For Japanese buyers this has been of great help in managing their costs.

China also had a strengthening currency in 2011, although the rate of improvement slowed in the year and in 2012 has actually not changed. For European buyers this had the potential of raising costs but conversely it has helped China to become a customer for some species thereby increasing competition for these.

Crude oil prices were at an elevated level all year peaking at > $120/barrel in April but stubbornly staying above $100 all year (see fig. 2.3). Fuel is one of the main operating costs for fishing vessels and these significantly higher costs can change behaviour especially at the fringes of the seasons when fish may be hard to find and the cost of burning fuel looking for fish is not worth the return.

Fig. 2.3 Comparison crude-oil-brent in US$ and €



Below we go into more details about the effects by individual species and country.

2.4 Labelling, Quality and Authenticity of Imports

We stand by our statements of previous Finfish Studies that AIPCE-CEP members invest heavily in ensuring that the fishery products they handle whatever their origin, comply to the highest standards of food safety, nutritional value and consumer appeal. Considerable time, effort and expense goes into the inspection and control of processing plants here in the EU and around the globe to meet these requirements.

How companies communicate their policies and activities in this arena varies but increasingly use of corporate websites and the like is developing. The use of trade associations is also helpful when communicating with institutions such as government and regulators where an industry wide issue is best solved together.

Trying to use consumer packaging or point of sale material to portray anything but the simplest of messages is extremely challenging and often impossible especially given the mandatory data that is already required.

AIPCE-CEP strongly refutes negative inference about products sourced from outside of the EU. With major reliance on imports acceptance by the market of these products is universal because they meet or surpass all relevant standards, provide the market with what it asks for and offers choices that would not otherwise be available.

Gaining consumer confidence in seafood products throughout the market has enabled sustained growth despite the challenges of supply and the economic climate.

Using technology to help provide this certainty is also a feature welcomed by AIPCE-CEP. For example the ability to use DNA checks to confirm species compliance helps to build confidence and also with future refinements will help in ensuring claims of sustainability and fishery provenance is accurate.

As cost pressures mount on businesses the use of additives and extenders in many products is happening. Fish is not immune from such development and it is important that all legal declarations and labelling requirements are met and that the competent authorities maintain their vigilance in monitoring such developments.

The EU and its industry are leaders in setting the standard for traceability and monitoring requirements that should be more widely adopted around the seafood world. Cooperation with other major seafood consuming and trading regions is noted as one of the ambitions of the EU-Commission and we welcome these efforts to enhance the focus on resources, responsibilities and reputation.

2.5 Ecolabelling

The EU through its reform proposals constantly refer to sustainability regarding fish and fishing. Although the pursuit of establishing and EU own standard for an eco-label appears to have waned again the Commission is discussing the provision of guidelines for eco-labelling particularly as voluntary labelling is permitted.

A number of schemes have been widely adopted in the industry as both B2B and with consumer communication. This is not just happening in Europe but on a global basis, applying to wild capture fisheries and aquaculture.

Efforts are being made to provide more formal 'benchmarking' between these schemes to help market understanding.

2.6 Regulatory Review

The regulatory environment is very active at the moment with the Commission working on several proposals and reviews of direct and potentially significant relevance to the fish processing sector and AIPCE-CEP members.

AIPCE-CEP continues its stance of being actively engaged in each of these and using its expertise and technical competences to provide coherent business feedback and suggestions that we believe will help make any regulation relevant, pragmatic and effective.

At the time of writing this report, several proposals are under active discussion in the Council of Ministers, the European Parliament and elsewhere. Consequently we do not intend to cover these proposals in great detail as the situation is constantly changing.

For those wanting to follow the debate many of the AIPCE-CEP documents are available on the website (www.aipce-cep.org).

In brief we highlight some of these below.

2.6.1 EU-IUU-Regulations

In the last two Finfish Studies the commentary has included the following statement:

'We fully endorse the efforts of the EU-Commission in impacting the trade in IUU fish but continue to express our concerns that this is a global issue and needs the adoption of similar standards of focus and control globally to have real effect. Whilst the EU is the biggest market for fish products it is not the only market and AIPCE-CEP urges all parties to ensure that these regulations do not simply displace any trade in IUU products.'

Having now had two years practical experience with the regulation in operation for products coming to the EU it seems the regulation has been successfully implemented and is achieving the intended purpose for EU trade.

AIPCE-CEP welcomes the initiative taken by the EU-Commission of instigating dialogue with other major seafood consuming regions and nations to explore the feasibility of creating a global scheme for ensuring all seafood is legally caught and traded.

AIPCE-CEP will continue their positive engagement in helping resolve issues that may arise and will draw on the experience of its members to ensure that supply chains are safeguarded.

2.6.2 EU-Control Regulation

Commission Regulation 404/11 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.

2.6.3 CFP and CMO Reform

This is the most significant regulatory review the fish industry is currently facing and in the last couple of years we have been working amongst our members to fully understand and help with ensuring that this reform achieves its intentions whilst enabling the industry to continue to meet the best needs of consumers and stakeholders within the industry.

The proposals have been modified and made clearer during the last 12 months and AIPCE-CEP is pleased to see that our original four concerns are still incorporated namely:

1. calling for the rebuilding of stocks through long term management plans
2. more effective and regionalised decision-making
3. maximising value from catch to consumer
4. ensuring that EU vessels operate to the same high standards wherever they fish.

In addition there remains a clear determination to tackle the extremely wasteful practice of "discarding" and we welcome that.

The Commission's proposals for reforming the CMO envisages a whole new raft of mandatory consumer information that took no account of the sophisticated global supply chains on which consumers depend and would have imposed significant new burdens on industry whilst adding information of no real value to consumers in making informed choices.

We recognise the benefit and need to ensure that consumer needs are fully reflected, since without customers the whole industry ceases to be economically viable.

However these requirements must add real consumer value and contribute to genuine consumer choice, not just increase cost and complexity or lead to confusion and mixed messages about what is truly sustainable. We also believe that the provision of information to consumers is a matter for horizontal food labelling legislation and as this was recently reviewed at some length leading up to the publication of the new Food Information Regulation 1169/2011, we regard this element of the Commission's proposals as unnecessary and not appropriate for a regulation concerned with the organisation of the market.

2.6.4 Tariff Regulation

Since the EU Commission tabled its proposals for CFP/CMO Reform in July 2011 we have been aware that the tariff control element had been dropped from under the CMO umbrella and was to be the subject of a new separate regulation of its own.

AIPCE-CEP had been cautiously welcoming of this suggestion especially given the crucial importance that our trade with countries outside of the EU plays.

On July 3rd 2012 the Commission published its draft proposals for this separation of the tariff regulations.

There are several key elements within this that concern us:

1. The dropping of the system of suspensions.
2. The total switch to an ATQ system with 3 yearly reviews.
3. Lack of clarity about how the process and recommendations were achieved.

As this document is now under active discussion in the Council of Ministers, AIPCE-CEP is very closely involved in the dialogue with the Commission and our respective member state authorities to share our views, concerns and recommendations.

At the time of writing, this is an extremely fluid negotiation and it would not therefore be appropriate to seek to cover all of the detail in this report.

However, as we have consistently said throughout the 20 year publication of the Finfish and Whitefish Study the processing industry is reliant on stable supply of raw materials. The primary purposes of publishing this report is to highlight the activity of the European processing industry and the reliance that we have on imported raw materials in order to fulfil that activity. Improving the business environment for a strong and sustainable processing industry and supporting the development of an innovative industrial base able to compete globally and create jobs in the EU is our key objective.

We repeat this message from last year's Study:

'The processing industry is reliant on stable supply of raw materials to meet the ever-growing needs of the EU community for a diverse range of nutritious, safe and appealing fish products. Indeed fish processors and retailers are already well ahead of policy makers in this respect, increasingly insisting that supplies come from certified fisheries and have full traceability, not just within the EU but also from the wider world market which supplies ***nearly two thirds of the fish which Europe eats****. Even if we succeed in making the EU's own waters more productive again locally caught fish is simply not going to be available in enough volume to satisfy the market and imports will still have an essential role to play in meeting consumer demand and offering a wider range of choice.*

The belief of AIPCE-CEP is that a successful market for fish in the EU is best served by having a vibrant and sustainable fishing sector here in the EU in parallel to allowing the use of resources from all around the world that are safe, sustainable and properly regulated'.

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. 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). Official conversion factors enable some consistency but in our opinion do not accurately reflect the differences between major processing methodologies and regions around the world so we have catalogued the experience of our members to try and improve the relevance. Changes to the global patterns in fish trade, fishery management practices and processing capabilities require these to be monitored so we review these for each study but try not to change them frequently in order to maintain valid comparison.

In the first 16 years of the Whitefish Study, conversion factors used by AIPCE-CEP to back-calculate were those officially adopted by the German Government. It was only as recently as 2008 that a common set of factors was agreed across the EU. Whilst AIPCE-CEP considered that these are generally relevant for fresh primary catching/conversion purpose from the experience of our member associations we saw consistent evidence that processing yields for semi-prepared fishery products, especially frozen, were often significantly better than the officially adopted yields. Accordingly, AIPCE-CEP agreed alternative conversion factors, which result in greater fish utilisation from

less whole weight equivalent of fish processed. We must re-iterate that there is an element of approximation that comes from this process but we believe the factors used are a far more accurate reflection of the reality of fish processing in today's global supply network.

Justification for use of alternative factors was explained in the 2009 Finfish Study and exemplified the impact of these changes. Factors used in this report can be found in Table 4.17. If not separately mentioned all import figures are expressed in Whole Fish Equivalent (WFE).

4. Import Supply Trends of Whitefish

This report discusses the fish supply to the EU. During its history the EU has enlarged in several stages and now comprises 27 member states. Collectively this grouping has now become the largest consumer for fish and seafood products although there is a wide variation of per capita consumption across each state.

Since this enlarged EU came into being (2006 = EU 27) the proportion of imported products as part of the total supply for consumption has remained at 63 % +/- 2 %. There has been absolute growth in the market for fish products reflecting population growth and also an increase in per capita consumption (see tab. 4.1).

In total imports (at WFE) have grown by around 500,000 tonnes since 2006 reaching a new peak in 2011 of 9.548 million tonnes.

Within these numbers are a multitude of species but a few have established themselves as essential to the market and underpin many of the major consumer product lines sold across Europe. Also there are certain formats (eg industrial blocks and surimi base) that have only limited primary manufacturing capacity in Europe but are the key base raw materials for many products where significant EU investment has taken place in converting these to consumer products. In these specific areas imported materials are paramount to running these operations and have always been the fundamental source of raw material.

Where this dependence is on wild captured fish stocks the availability of individual species varies from year to year dependent on the quotas set by the flag state responsible for the fishery. Quotas tend to be cyclical and move through periods of higher and lower levels that are governed by natural

factors. For example the current status of the Atlantic cod fishery in the Barents Sea shows a spawning biomass at the highest level for 60 years+ (ICES data) so the scope for quota increase is at its maximum after recovering from a relatively low stock situation. Similarly we have seen a recovery in US Alaska pollock quotas in the last three years after a cyclical dip.

Consequent to these variations the EU processing industry has become adept at being able to switch between species when supply variations require it. However, there is less freedom to do this between formats as equipment investments limit flexibility.

Large scale market developments have taken place across the EU in response to the improving availability of stable long term fish resources from around the globe, including where available EU fish. The long term expansion of aquaculture is helping drive some of these particularly when large supplies of individual species create certainty and scale that warrants investment in both capital equipment and market development.

Improvements to logistics services have also helped create different market opportunities by making fish more accessible and affordable.

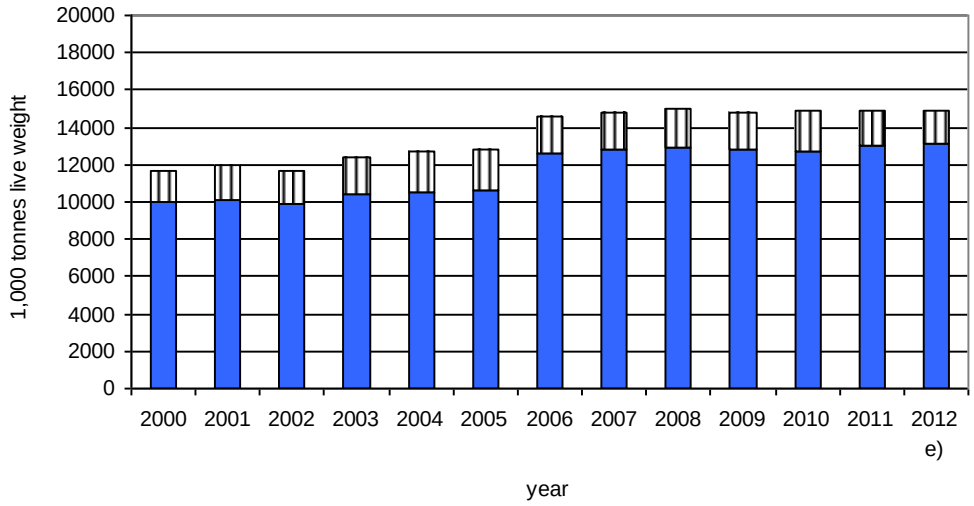
So we have seen the traditional species maintain a strong and viable presence in the markets but these have been supplemented and in some cases surpassed by fish species and formats that offer greater scale and availability.

4.1 Total Fish Supply (all species)

The 14.671 million tonnes is only very slightly higher than 2010 but suggests the market is stabilised after the problems of 2009 and maintains the importance that fish products play in the food consumption within the EU (see fig. 4.1 A).

Fig. 4.1 A Actual supply for consumption and export

(from 1997 to 2003 EU (15), 2004-2005 EU (25), from 2006 EU (27))



Source: Tab. 4.1food balance for fish;
e) = estimation
Chart: AIPCE 2012

The 14.671 million tonnes comprised 5.123 million tonnes of national landings (excluding non-food use) and aquaculture products plus 9.548 million tonnes of imports. Exports amounted to 1.870 million tonnes. The food balance between EU origin fish supply and imports resulted in an EU dependency on imports to the extent of 65 %, the highest figure since the EU 27 was formed (see fig. 4.1 B).

We base our data on Eurostat figures for trade flows and there are retrospective adjustments that can affect previous numbers. For internal EU catches we glean our data from the EU websites and also use the FAO database for verifying previous year's data. Unfortunately in both of these cases the data is not live and results in estimations for the most recent two years. Consequently following the publication of FAO Statistics for 2009 we have revised the aquaculture numbers downwards and also the EU catches estimates for 2010 and 2011. This partly explains the apparent increase in import dependence.

However, if we focus on the import numbers we see this has increased by 140,000 tonnes since 2010 and is the highest since measuring against EU 27. The key contributors to this change are discussed in detail later but in summary are:

- Wild captured whitefish species increased by 159,000 tonnes
- Freshwater species down by 110,000 tonnes
- Salmon up by 28,000 tonnes
- Surimi base up by 16,000 tonnes

Pelagic species are more or less constant:

- Herring down 57,000 tonnes
- Mackerel up by 21,000 tonnes
- Tuna up by 73,000 tonnes

For the first time we are including tables for shrimps and cephalopods and to try and provide a fuller understanding of the trade flows. Our preliminary estimates for these categories show the following changes:

- Shrimps slight decline of 12,000 tonnes
- Cephalopods decline of 38,000 tonnes

In our estimates (after adjusting for the historical corrections from 2009 data) we think there is a further decline in EU total catches of 2.7 % to 4.821 million tonnes (including non-food uses). Our analysis for the quoted species complex shows a reduction of 4.9 % in those species to 2.598 million tonnes. For the 7 major whitefish species there was an increase of 2627 tonnes or +0.7 % (see chapter 5).

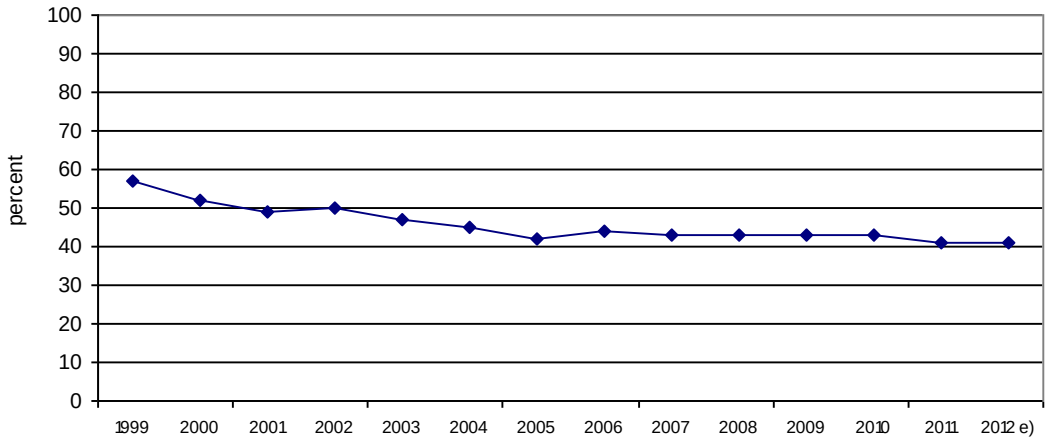
We have revised our estimates for EU aquaculture downwards in line with the FAO 2009 statistics.

Export volumes declined to 1.870 million tonnes after a promising recovery in 2010.

So total fish availability for consumption within the EU we estimate to have grown to 12.8 million tonnes representing a per capita of 25.5 kg/year (WFE).

Presenting our other chart expressing self-sufficiency where it is assumed that all edible fish caught in the EU is utilised within the EU we can see this has decreased to 40 % the lowest seen since EU 27 formed. The retrospective correction from official statistics explains some of this but the growth in imports maintains a trend we have seen for a long time.

Fig. 4.1 B Changes in EU catch and self sufficiency in relation to third country supply from 1998 to 2003 EU (15), from 2004 EU (25), from 2006 EU (27)



Source: Tab. 4.1food balance for fish;
e) = estimation.- Chart: AIPCE 2012

4.2 Wild Captured Whitefish Supply

The total supply of wild captured whitefish grew by just under 6 % to 2.936 million tonnes bringing it back to the levels pre the global economic turmoil (see tab. 4.2).

Imports dominate this category and have edged above 89 % again. EU catches advanced slightly as well in the major groundfish species. This is summarised in table 4.2.

The key reasons for this positive trend may be explained by the following:

- As reported last year the global quota trends for major whitefish species are generally upwards. Some of this is cyclical as we see in Barents Sea cod and US Alaska pollock but there is no doubt that the precautionary approach and greater focus on long term sustainability goals is contributing to the improvement in supplies. EU catches held stable in most species and saw modest growth in saithe and plaice.

- Prices across the whitefish complex were broadly flat and the Euro/$ rate was actually quite favourable for importers during the middle part of the year.

- Consumer demand was growing

Throughout the history of the Finfish Study we have highlighted the dependence of AIPCE-CEP members on whitefish and the significance of imports in the category. Amongst this group of species are a few that are particularly important either across the EU (eg Alaska pollock) or specifically to certain member state markets where historical consumption and preference drives demand (eg cod in Portugal and UK). Below is a commentary about these key species:

- **Cod** retains the no.1 status of preferred species in the EU in 2011 and has gone above 1 million tonnes net consumption reflecting growth of 5.8 %.

  EU catches grew by 1 % to just under 139,000 tonnes but still does not reflect the full potential of quota availability (see chapter 6).

  Imports grew by 6 %. This was fuelled by the opportunities created by major quota increases in the Barents Sea resource of 100,000 tonnes (primarily shared by Norway and Russia), improved Icelandic quotas (+ 10,000 t) and US Pacific cod (+ 65,000 t).

  Since the last report the share of all cod certified as sustainable (MSC) has grown to about 60 % of the supply and this is helping underpin both consumer and industry confidence in sustaining demand for this iconic species.

  Growth came in all sectors of supply with whole frozen up by 3 %, salted/dried by 2 %, fresh by 2 % and frozen fillets by 12 %.

  It is important to note that considerable value is still added in the EU when processing cod. The import of whole frozen of 120,000 tonnes represents a key sector with the material used for salting and fillet production. When adding the fresh whole import of 42,000 tonnes to this total the total imports of whole cod are almost as much as the total catch of EU cod.

  EU self-sufficiency remains low in the species at 14 % and as a region the EU is by far the major global market for the species accounting for around 70 % of consumption.

- **Alaska pollock** has surged forward in volumes in 2011 increasing by 18 % to 854,000 tonnes but is still below the peak year of 2008 when it was above 900,000 tonnes.

  The primary driver of this change was the sharp increase of quota in the US fishery of 50 % which quickly translated into much improved availability for fillet blocks and mince (note: surimi increased as well but is separate from the above figures). Russian catches increased slightly.

  This is reflected in the share growth for imports between the key supply countries. US products went up by 40 %, Russia was stable and China moved up 10 %. Note that due to the seasonal nature of Alaska pollock fishing that not all the extra products from the USA arrived in Europe for sale before the end of 2011.

  As the North Pacific Alaska pollock stocks are the largest human food stock fishery these dynamics are hugely important to global whitefish market. Europe is the largest buyer but competition for this species is strong around the world and the US and Japan in particular are large consumers of the species.

  There were some unusual circumstances around the trade in this species in 2011 notably the impact that the tragic twin disasters of earthquake and tsunami that devastated the north eastern seaboard of Japan in March had on the global trade of certain seafood items. In the case of Alaska pollock the surimi producers reduced their volumes in the second half of the year in anticipation of less demand and fillet output was favoured. This extra fillet production in part found its way to Europe but did not all arrive before 2012. In 2012 the demand for surimi has recovered and will re-balance the market.

  The vast majority of Alaska pollock imported into Europe is in the form of industrial blocks. Large investments have been made in processing facilities for everyday iconic products such as fish sticks that form the core of activity for most member state markets. It is on the back of these types of efficiently manufactured products that further investment and variety are based. Currently no other whitefish species produces anything approaching enough blocks to adequately satisfy this sector.

- **Saithe** volume again declined by 16 % to 185,000 tonnes directly reflecting the reduced availability of the species due to quota cuts in all the North Atlantic fisheries offset slightly by improved EU landings.

  As pointed out in last years study the competitive set for saithe has changed and it now

trades as it now trades at a higher value than historically. Some of this comes from developments of non-EU markets where saithe is seen as an attractive alternative due to its

size and suitability for products (eg salted). It also is resulting in less industrial block production compared to historical levels thereby triggering substitution of other material sources eg Alaska pollock.

In fact the only sector to hold onto volume was whole frozen fish with all other fresh and frozen formats seeing reductions of 20 %.

The EU share of global trade hovers around 55 % but self-sufficiency has improved slightly to 29 %. This is because the EU landings have actually increased since 2010 despite a quota cut of 14 %. In total landings came to an estimated 53,549 tonnes meaning more than 87 % of quota was landed, a good improvement on the 70 % estimated for 2010.

Redfish volumes declined for the second year this time by 7 %. Import levels remained stable but cuts to quota and catches in EU waters of around 20 % reduced availability. Of the EU quota only 67 % is estimated to have been landed for 2011. Consequently self-sufficiency slipped back to 25 % from 30 % in 2010.

Haddock volume grew by 4 % to 222,000 tonnes and is the highest figure seen in the Finfish Study with the enlarged EU25/27.

Last year was also the year when global quotas peaked above 400,000 tonnes in the current cycle primarily due to a very high level set for the Barents Sea (Norway/Russia). It now looks likely that this trend is changing and quotas will fall for a few years something which has already begun in Iceland and the Faroes.

The EU is the major global market for haddock products although this has slipped back below 60 % in 2011 due to the expansion of the domestic Russian market.

Catches in the EU slipped back slightly (-1 %) even though the quota was modestly increased by 2 % meaning that only 87 % of the quota opportunity was caught.

Frozen products have been the driver of the growth and Russian fillets in particular have seen strong growth of 71 %.

Hake remained static at 533,000 tonnes although the EU catch rose increasing share to 11 % the highest seen since EU 25/27.

After a long period of variability the global hake situation has levelled out and supplies are stabilising. The EU accounts for about 50 % of global consumption and has some catching agreements beyond its borders that continue to influence product formats and market access.

Across the sectors the decline of fresh imports, mainly into southern Europe appears to have stopped and whilst not growing it remains an important sector in value especially as it is more favourably disposed to the use of European hakes for which the absolute catch increased to 61,000 tonnes in line with the quota increase of 11 %. Quota left in the water amounted to 19 %.

- **Hoki (New Zealand caught)** saw positive growth of 21 % to just under 50,000 tonnes. This opportunity has been created by the increased quota in the NZ fishery after a period of cautious management that held back on pushing to higher levels of catch until more certainty was felt in the recovery. The sustainability credentials for the NZ hoki fishery have been key to its ability to so quickly recover market share and acceptance. Catching has continued to improve in 2012 and it now looks that this fishery is in an upward trend cycle and scope exists for expansion.

  (We have not yet made a separate analysis for the South American hoki fisheries of Argentine and Chile which have become well established).

  Obviously there is no EU self-sufficiency in this species. In the case of the New Zealand fishery the EU market accounts for approx 40 % of the global market share.

- **Plaice** has improved slightly with volumes up around 2 %. However, it is disappointing that this is not more as the quota increase in the EU was close to 10 % but catches only advanced by an estimated 3 %. The EU catch accounts for 93 % of the market and we are close to self-sufficiency.

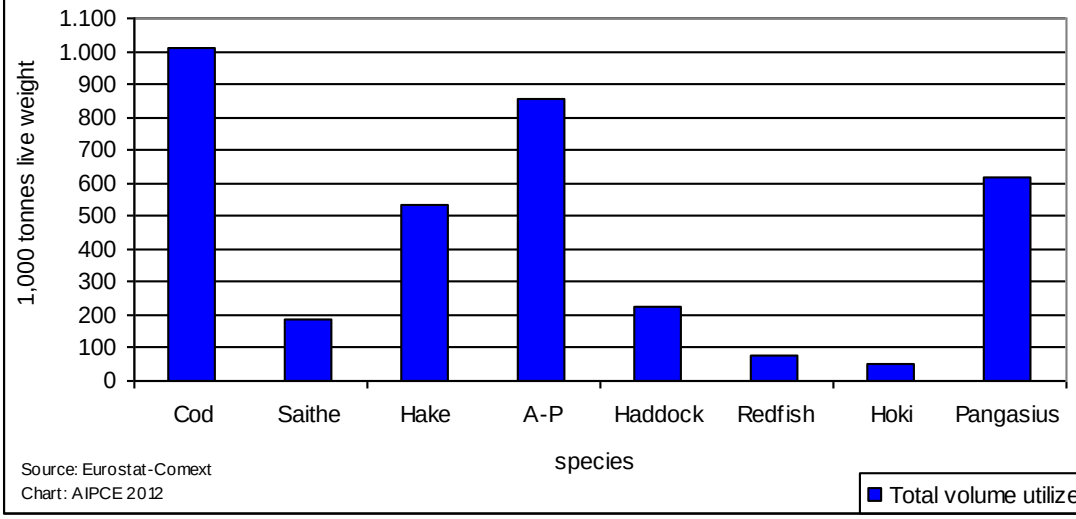
  There is some competition for plaice from a complex of alternative flatfish species which this study does not yet analyse in any detail.

In total the 6 % growth in imported volumes of wild capture whitefish shows the market is expanding again after the wobbles and uncertainty during the global economic turmoil of 2008/2009.

It is encouraging that this growth is coming from consumer demand but is also being supported by greater global catches of many of the key species of whitefish. Whilst the whole species complex shows variation in the strength of recovery the reality that several of the globe's major resources are improving bodes well for the future.

Within the EU catches have grown slightly although there is still a lot to achieve before their full potential can be genuinely understood. There is considerable degree for EU fish to expand its role in the market not just by taking more share but also by supporting growth.

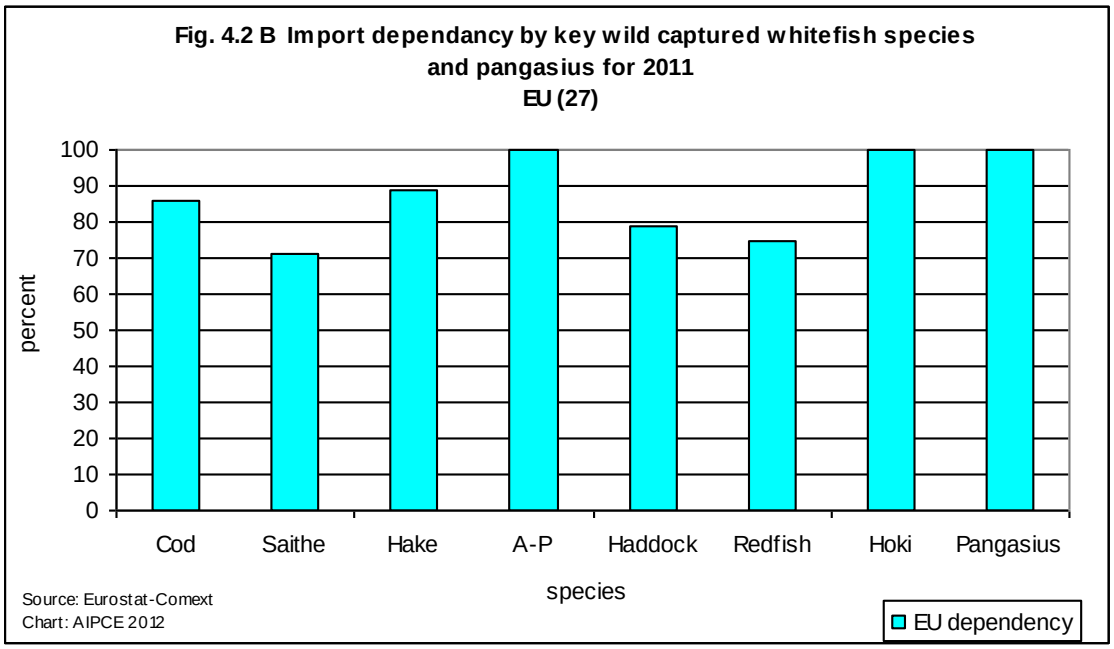
Fig. 4.2 A Total volumes utilized by key wild capturesd whitefish species and pangasius for 2011
EU (27)



Source: Eurostat-Comext
Chart: AIPCE 2012

With the reliance on imports being close to 90 % in this sector it is imperative to recognise that they are essential to the long term interests of the consumers, the processing industry and also the catching sector in maintaining a viable and vibrant future.

Fig. 4.2 A shows the total volumes used for each of the key species and fig. 4.2 B illustrates the reliance on imports in meeting that demand.



4.2.1 Principle Supplying Third Countries for Whitefish

Developing the data beyond the key species we also analyse the third countries that are supplying the EU in the multiple presentational formats. Table 4.3 summarises this for key species of wild captured fish and 4.13 for cultivated freshwater fish. Tables 4.4 through 4.16 give this at a detailed species level.

The previous chapter discusses some of the changes and their reasons and in this chapter we expand on this to consider the specific circumstances that are affecting individual sources of supply.

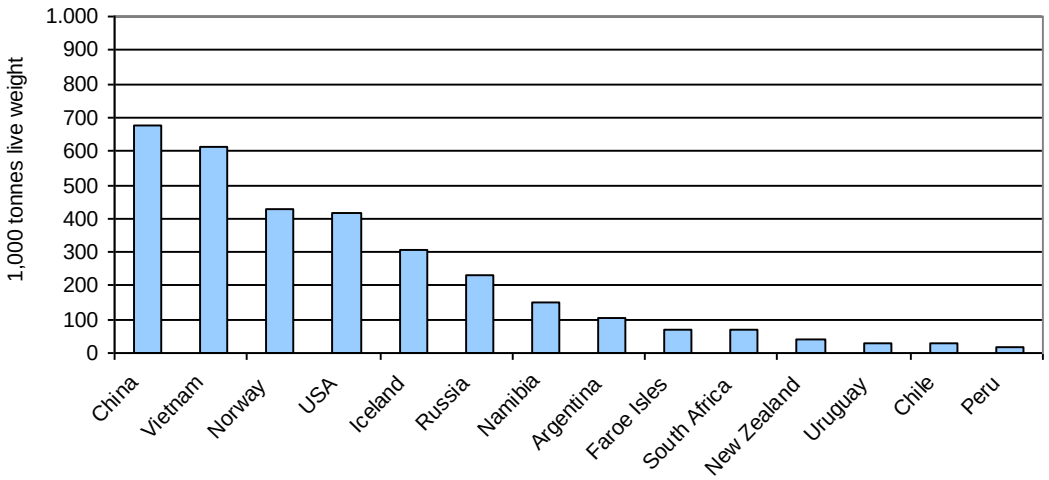
One major feature of the seafood industry of the last 10-15 years has been the relocation of primary processing away from the catching nation/quota holders to other countries with infrastructure and labour opportunities that have transformed the ability to present fish and seafood products in a more diverse way. The biggest of these is China particularly in Shandong and Liaoning provinces where processing hubs are now well established that cater for handling a wide range of species and formats. More recently we have seen other Asian countries creating similar hubs albeit with a narrower range of species so far. One common feature for these facilities is their flesh recovery rates that are significantly better than those achieved by the current and previous generations of filleting technology alongside the flexibility for cutting patterns and portioning that hand cutting allows.

This statement does not apply to all fisheries and many maintain much of the primary activity within their borders (eg the amount of EU caught whitefish fish exported for further processing and subsequent re-importation still remains quite small). Also as technology develops that can respond to closing the yield gap and improve flexibility for cutting patterns it may be that this trend will begin to be reversed and the nation catching the fish processes more.

For now, at least, the imports shown from a country are not easily ascribed to the original catching nation. This does distort the figures and disguises some of the rate of progress being made in fisheries.

As much as possible we have tried to reflect these differences in calculating the Whole Fish Equivalents (WFE) so we have a comparable unit of measurement but recognise there will be margins of error in doing so.

Fig. 4.2 C Volume of wild captured whitefish and pangasius supplied to EU (27) by third countries for 2011



Source: Eurostat-Comext
Chart: AIPCE 2012

- **China** is the largest supplier of products of wild captured whitefish accounting for 26 % of all import volume (675,000 tonnes +11 %). Except for a tiny fraction this processing utilises fish caught elsewhere than China (China's customs regulations require that any imported fish destined for primary processing and re-export has to be re-designated as Chinese origin, hence its leading supplier status).

China has also re-asserted itself as the biggest supplier of whitefish products when including cultivated species with a total in excess of 700,000 tonnes.

Whilst China faces challenges to its competitiveness from other countries (in Asia) there was overall growth in the amount of fish processed by China last year with the ultimate market being the EU. Alaska pollock is the most abundant species supplied accounting for around 60 % of all volume but most of the key whitefish species feature significantly as part of global supply.

The infrastructure and skillsets supporting fish processing in China (particularly the Northeast) remains very strong and provides this country with ample capabilities to maintain its volume leadership.

- **Vietnam** slipped back to second in overall whitefish volume as supplies of pangasius into the EU shrunk by 12 % to 183,000 tonnes of fillets (615,000 WFE). The key reason appears to have been the rising cost of production for the species where the economic sustainability of the previous model has been challenging. This trend received some publicity in 2011 but appears to have accelerated further in the first half of 2012.

  There are also a few EU member states that have resisted pangasius preventing it becoming established in their market.

  This is the second year of separate analysis of freshwater imports under the new customs codes and is enabling us to see the trends by the three key species of pangasius, Nile perch and tilapia.

- **Norway** grew by only 1 % in wild whitefish to 427,000 tonnes. Fresh in total accounted for just under 21 % of whitefish import volume very slightly down on 2010.

  Atlantic cod is the dominant item at around 50 % of volume and surprisingly given the growth in quotas cod remained static with advances in whole round volume offset by declines in both fresh and frozen fillets.

  Saithe reduced by 12 %. Since achieving MSC Certification the price for Norwegian saithe has been elevated to very high levels and it now appears to have established a new benchmark for the species. Haddock volume increased by 14 %.

In the case of these latter species the trend of increasing resources and quotas has now peaked and it looks like they are moving into a cyclical reduction that will impact quotas for a while. However, cod remains extremely strong with the spawning biomass of Arctic cod at a 60 year high.

For the purpose of this Study we are only detailing the whitefish market but it is always worth noting that Norway is also a major trading partner in several other finfish species, notably farmed Atlantic salmon and pelagics such as herring and mackerel. Taking these into account makes Norway the largest trading partner of the EU in live fish weight equivalent with a number close to 1.5 million tonnes.

- **Iceland** has slipped back to no. 5 with a slight decline in volume of whitefish to 305,000 tonnes WFE. Quota cuts in haddock and saithe are the principal causes. Cod is now reflecting the upward movement of catching levels. The resource has recovered enough to allow the management targets for harvest rules to be met. Redfish has stabilised after the problems of 2010.

  Fresh volumes from Iceland held up well with the exception of whole haddock.

  Fresh accounts for 23 % of Icelandic activity with the EU. This reflects the strategy that Iceland has in place to be a key player in this sector of the market.

- The **USA** regained no. 4 in whitefish activity on the back of a significantly increased Alaska pollock import (up 40 % to 328,000 tonnes) on the back of a corresponding quota jump of 50 % in 2011. This figure only allows for fillet and mince imports where there is species segregation. Surimi imports for US also increased by 48 % in 2011 of which pollock is the main contributor.

  Pacific cod declined by 6,000 tonnes (12 %) probably due to the greater availability of Atlantic cod and substitution.

  Given the sustainability credentials associated with products sourced from Alaska momentum is easily regained in the market as availability improves.

  US Alaska pollock along with Russian pollock forms the largest human food fishery in the world totalling some 3 million tonnes. For the European seconddary processing industry the industrial block has become the cornerstone of much investment in Northern Europe and Alaska pollock (from US producers and Chinese processors) has been by far the major source.

Current regulations allow all these blocks that are used for *added value* processing to come into the EU under a full duty suspension. Retaining competitive access to this key raw material is essential to the ongoing viability of this key sector.

- **Russia** recovered the lost ground of 2010 with 16 % increase in volumes to 232,000 tonnes.

  We explained last year that some of the 2010 decline could have been due to the distortion created by the delay in gaining EU approval for issuing IUU catch certificates for a period of 6 weeks. Obviously this is not a factor for 2011.

  We also made reference to the clear strategic intent of the authorities in Russia to prioritise preference for domestic consumption of fish improving self-sufficiency.

  Although volumes to the EU have grown in the key species so did the quota for each of them. Consequently it may well be that the catch increases (cod up 15 %, haddock 25 %) of these key species was at a greater rate than the domestic market growth but it does not necessarily mean that the Russian strategy for greater self-sufficiency has been changed. Indeed indications from Russia regarding tariffs etc. suggest they are determined to become a key buyer of certain fish products and will be a competing force in the future.

- **Other nations** have remained in similar position to last year although changes from individual regions have been quite significant. Close to home the Faroe Islands have struggled with their saithe catches with volumes down 49 % compared to 2010.

  Hakes from Southern Africa (Namibia and South Africa) showed a modest recovery of about 10 k tonnes but the South American fisheries offset this with matching decline.

  New Zealand has done well with hoki and this species is finding the EU a responsive market to increasing availability. The long held sustainability credentials have eased acceptance.

4.2.2 Importance of Semi-Prepared Fish Imports

The EU added value processing relies on imported semi-processed fillet and portion supplies of wild captured whitefish species, both fresh and frozen. Much of the frozen fish is in block form as is the 'meat' category detailed in table 4.3 and illustrated in fig. 4.2 D. (Note: these figures do NOT include Pangasius).

Fig. 4.2 D An analysis of the volume of unprocessed and processed important whitefish species imported into EU from third countries for 2011 (tonnes live weight)

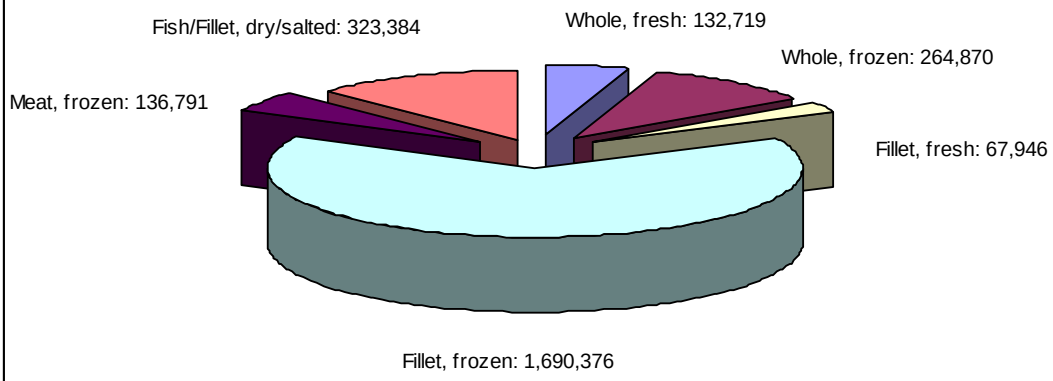


Chart: AIPCE 2012

Trends that we saw in last years Study seem to have continued into 2011:

- Whole fresh fish imports have again declined by 6 % to 132,000 t. Iceland and Faroes are the biggest changes. In part this mirrors quota and catch declines but probably also reflects that where it can the catching country is trying to hold onto the processing value of converting whole fresh fish to fillets.
  The decline of southern hemisphere species has stabilised but given the high cost of transporting these to the market, which is also principally in southern European member states it may well be that current economic conditions will suppress activity for some time yet.

- Fresh fillet volumes are again stable but Iceland has grown supporting the argument of keeping the added value locally. The Faroes decline is as a consequence of their catch reductions. Surprisingly Norway also reduced by 11 % and probably is a consequence of the greater availability of cod from Iceland although the Norwegian share is only about 40 % of the Icelandic volume.

- Whole frozen recovered slightly attributable to the higher Barents Sea quotas shared between Norway and Russia. With this greater availability prices for H&G Atlantic cod were lower in the early part of 2011 and helped stimulate volume. Pacific Cod suffered declines during this time with imports from the US down 5,000 tonnes likely as Atlantic cod gained share. This mainly happened in the salted product sector.

- All frozen fillet formats appear to have grown with Alaska pollock blocks and A. cod leading the way. Since we began using the updated conversion factors in 2009 this is the highest

level of imports seen (+9 % @ 1.69 million tonnes) and is showing the market to have recovered from the impacts of the economic crises.

- An early analysis of first half imports for 2012 suggests this may be slowing again although the level of change is quite varied by member state. Short term factors such as the Euro/$ exchange rate may be distorting levels of activity.

- Salted and dried volumes are stable edging up only 2 %. All of the increase comes from greater availability of cod in Iceland where the larger fish is most commonly used for this product type. Considering the current economic climate in southern Europe this stability is good to see.

- Freshwater species have seen curtailment in 2011 with a significant drop of 12 % since 2010. Pangasius takes the brunt of this as it is down 26,000 tonnes of fillets (88,000 tonnes WFE) in the statistical analysis.

4.3 Total Supply of Surimi Base

Surimi is the insoluble minced fish protein derived from a number of species by a multiple washing and separation process. The resulting preparation is for distributed in frozen block form, typically used as the base for added value product preparations such as crab flavoured seafood sticks and similar analogues.

The EU has some particularly important processing companies converting imported surimi-base material into consumer ready Surimi-preparations in member state countries such as France, Lithuania, Spain, Italy and Poland.

In last years Study we recognised a return to double digit growth after a wobble induced by the global recession effects of 2009. This trend has continued well into 2011 with added volumes of 16 % (and is indicated as the same in the first half of 2012 as well) suggesting that EU processors have found an attractive and commercially viable model for consumers throughout Europe. There has been some consolidation in the industry that is helping drive this further.

The global availability of surimi base is showing the usual fluctuation from region to region. Tropical surimis from Asia have grown from Vietnam and India but correspondingly reduced from Thailand and China. In part this is happening because more of the SE Asia region, especially China, is now becoming a major user of surimi base for internal consumption.

The greatest increase in supply has come from the US Alaska pollock industry due to the 50 % increase in quota. This source of material moved up by 8,000 tonnes (37,000 tonnes WFE) in the year.

The EU processors handled 47,000 tonnes of surimi base in 2011 and in total the market has grown by close to 50 % since the low point of 2009 and shows little sign of slowing down.

4.4 Total Supply of Surimi Seafood Preparations

Surimi preparation imports, such as crab flavoured seafood sticks, also contribute an important fish resource, but in this instance they are fully prepared added value products and subject to significantly higher tariff bands unless they come from countries with GSP arrangements.

In contrast to the surimi base situation this sector is continuing its decline. 2011 saw another 7 % come off the already reduced volumes of the last few years.

The effect of the growth of the SE Asia market for consumer products may well be absorbing capacity that was previously used for Europe but this change also confirms that European processors who rely on importing surimi base are very capable of being able to meet consumer demands successfully and competitively given a competitive and ready access to their base raw material.

4.5 Total Supply of Freshwater Fish

Following AIPCE-CEP requests the data for three of the major species of freshwater fish has been sub-divided in Eurostat since January 2010 with the introduction of separate CN codes. Now we have two years of data for pangasius, Nile perch and tilapia (see tables 4.14 – 4.16).

The first observation from the figures is that the cumulative imports of freshwater fish are down quite substantially by around 12 % from the 925,000 tonnes of 2010. This is almost entirely down to activity change with Vietnam.

- Pangasius fillet imports dropped by 12 % to 183,000 tonnes confirming that the rapid expansion of this species in Europe has come to a halt, at least for now. Problems within the industry in Vietnam have contributed to this and seem to be continuing on into 2012 with the first five months statistics showing another decline particularly in Q2.

The EU share of global trade has dropped back in this species which not only comes from the shrinkage in Europe but also the expansion of pangasius into other markets notably US and Brazil.

- Nile perch also reduced by 4,000 tonnes of fillets almost all in the frozen state. Sales of fresh fillets held up at 21,000 tonnes suggesting the market may be stabilising after taking a hit during the global recession.

- Tilapia held on to the recovered volumes of 2010 at 19,000 tonnes of fillets. In general the challenging supply conditions encountered in major growing regions such as China were not as adverse in 2011 so supplies were more predictable. The EU is still a minor player in this species on a world scale.

5. Import Supply Trends of Non-Whitefish Species

As we have said earlier this Study primarily focuses on the EU activity in whitefish species which form the principal raw materials for the members of AIPCE-CEP as processors. However, the improved access to a whole range of fish species from either wild capture or aquaculture means we are seeing greater interchangeability between species and formats than ever before. Within the tables of statistics at the end of this report we now include salmon, tuna, herring, mackerel and for this first time this year shrimp and cephalopods. Our commentary is limited on these for this year but we feel it important to continuously put in context the scale of our industry and the diversity and dynamism that comes along with it. As is the case for whitefish the dependence on materials sourced from outside of the EU is dominant but final processing in preparation for the consumer market is still a considerable generator of value, employment and choice within the EU.

In many cases the EU supply of materials within these categories is a feature but the absolute amounts available are inadequate for a hungry market. There are many instances where this turns to an advantage for the EU supply as it can select the most valuable market sector as its outlet eg fresh or local.

The market for fish and seafood products in Europe can continue to expand and locally caught and imported fish can work in a complementary way to achieve this.

5.1 Total Supply of Salmon (Farmed and Wild)

When the 2010 Finfish Study was published in September we commented on the key changes that were happening in the salmon markets at that time:

a. Prices had just started to fall after a sustained period of higher levels that had slowed the rate of growth.

b. The global supply pattern had also been heavily disrupted due to the disease problems in Chile of 2008/9.

During 2011 the overall demand for salmon increased by 3 % across all formats. This was better growth than 2010 (1 %) and because salmon is one of the top 3 finfish species sold in the EU any volume change is quite impactful. Our estimate is of an EU market that uses 936,000 tonnes of imported salmon (see table 5.1).

The price development from mid-2011 onwards has been at the lower level. The impact of this was not immediately felt by the consumer as large quantities of farmed Atlantic salmon were bought against long term contracts and these deals had various exhaustion dates some of which carried well into 2012.

One of the principal causes for the marked change in salmon pricing was the rapid recovery of Chilean supply over the last 12 months. Although not a big source of salmon for the EU the alternative markets for Chilean salmon, notably US fresh demand, were able to more economically source from Chile and this displaced significant quantities of fresh salmon from Norway back into the global market.

In EU supply Norway dominates accounting for >75 % of all imported salmon material and for farmed salmon 90 %. Faroes come a distant second with <6 % of total imports. Chile is only around 2.5 %.

Whole fresh is by far the biggest sector at 64 % of the total (see fig. 5.1 A). This is because most processing capacity exists in the EU and the advantage of being close to the market sale point helps in cost efficiency and shelf-life maximisation.

Fig. 5.1 A An analysis of the volume (1,000 tonnes) of unprocessed and processed salmon imported into EU from third countries for 2011

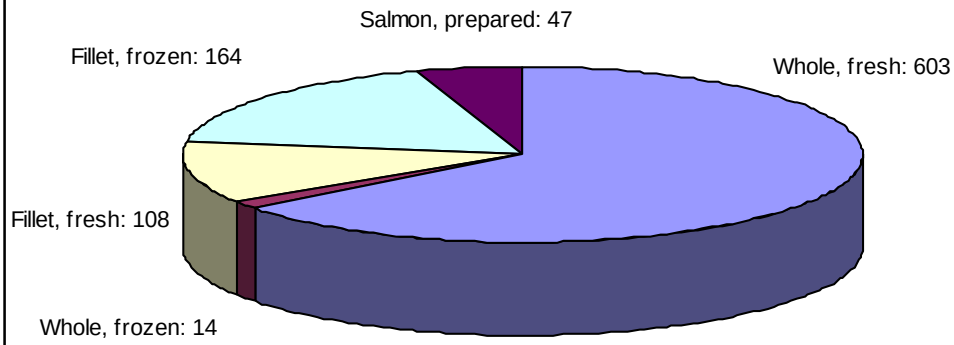


Chart: AIPCE 2012

Wild captured salmon from the North Pacific saw a relatively low year for imports. This is partly a reflection of the catching in 2010 season which was a 'low year' (wild salmon catches for the most abundant Pink salmon species tends to be in a two year cycle of which the even year is low and the odd year high) and this fish comes to market during the last quarter of the year of catch and the first three quarters of the subsequent year.

Table 5.1 B shows a decline in volumes from China were much of the Pacific salmon is processed into fillet formats down by 11 % although there is 10 % increase in whole salmon directly from the US. Wild Pacific salmon has accounted for approx. half of the frozen fillet market in the EU for the last two years as Chilean farmed volumes have reduced and it will be interesting to see how this adjusts in future.

The prevailing market conditions for pricing of farmed Atlantic salmon as discussed above has had some impact on the Pacific salmon market which has its price sent once a year during the summer catching season. This worked to the favour of Pacific salmon at the beginning of the season perhaps explaining the small increase in whole salmon from the US but has worked against it in late 2011 and early 2012.

A major use for Pacific salmon is into canning and the UK is the key market in the EU. During 2011 prices in this sector were very high and stocks of product unusually low which can result in a production mix shift that overlaps between years.

Fig. 5.1 B An analysis of the volume (tonnes) of frozen salmon fillet import by country into EU for 2011

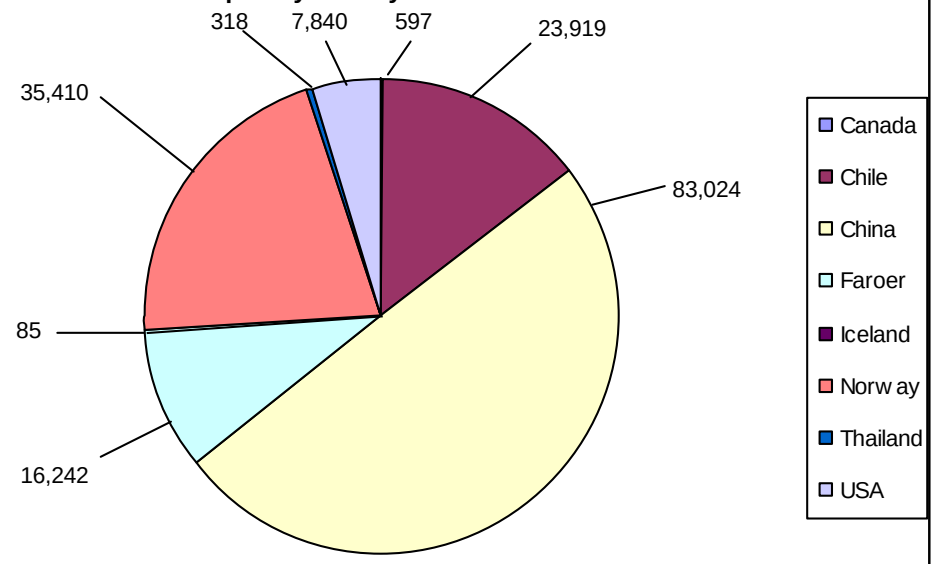


Chart: AIPCE 2012

5.2 Total Supply of Tuna

We have only included tuna statistics since 2010 and are yet to expand our dialogue about this species in this report but recognise that it is an important source of food for EU consumers and provide significant employment in several member states where added value processing goes on (see table 5.2).

Much of the tuna is imported in cans and often from countries where EU countries and companies have invested in processing facilities and have local partnerships including catching agreements.

Around 4 % of tuna imports come to the EU as fresh for sale to consumers as a premium item.

The cumulative volume of tuna makes it a very large species grouping, important not just to the EU choice and fish market but also making the EU the largest market area for tuna species.

The whitefish category is still bigger but tunas and salmons combined are of similar size.

5.3 Total Supply of Herring and Mackerel

As with tuna the inclusion of statistics for pelagic species (see tables 5.3 and 5.4) has only happened for the last couple of years in this study. AIPCE-CEP believes that the interchangeability within the fish species complex has increased and successful marketing campaigns and product developments are encouraging consumers to eat a wider variety of fish species than before. The specific characteristics of pelagic fish that contribute to personal well-being have been well documented and have increased the demand and values for species in this category.

After the falling away of catches in 2010 it appears that the supply side for herring saw improvement in 2011 with catches estimated to be up by 19 % as a greater proportion of the quota has been taken and utilisation is estimated to be up to 84 %.
Due to the delay in completion of the official statistical database these estimates may prove to be wrong but the trend seems positive.

2012 quota levels have increased by 23 % suggesting this will improve again.

Mackerel is in a less fortunate position although utilisation does appear to have improved to around 93 % from 80 %. There are many complexities around the mackerel situation and these are extremely contentious. In this study we will not make comment on these matters.

5.4 Total Supply of Shrimp

For the first time the import trade flows of shrimp into the EU have been documented (see tab. 5.5). A detailed description will follow in next years report.

5.5 Total Supply of Cephalopods

General imports and trade of fresh or chilled cephalopods are negligible, therefore the analysis focuses on frozen products.

It is very relevant to the processing industry to distinguish squid (*Loligo spp*) from other genus, *the so called "potas or poton"* such *as Illex spp, Ommastrepes, Notodarus spp, Todarodes spp*. *or Dodisicus*

spp. The anatomic differences of these two groups change significantly as for the way of processing these products.

The major sources of loligo are Falkland Islands (*Loligo patagónico*), India (*Loligo duvauceli*), Thailand, China (*Loligo chinensis*), USA (*Loligo opalescens*) Vietnam and South Africa (*Loligo reynaudi*). The supply of 2009 was improved in 2010, but the same levels were not reached in 2011, imports for *Loligo spp.* declined 10 % in 2011. Falkland Islands and India exported almost 107 % and 56 % to Europe in 2010, more than in 2009. In 2011 the landings in South America were good in the first semester but disappointing at the end of the year, so the imports reached levels slightly higher than in 2009 but they did not reach the levels of 2010. The lack of sufficient supply from Malvinas and India in 2011 was compensated to some extent by imports from USA and Morocco.

The major sources of squid (*potas-poton*) are Argentina (*Illex Argentinus*) and China (*Illex Argentinus* and *Todarodes pacificus*), which accounted for 62 % of total imports in 2011. Peru (*Dodisicus gigas - poton*) and New Zealand (*Notodarus sloanii*) are becoming more and more relevant as alternative sources due to the lack of sufficient supply from Argentina and China, which reduced their exports dramatically in 2011.

The trend observed for the last three years is similar to the case of loligo, 2010 was a good year, especially as for imports from Argentina and China; however imports declined by 13 % in 2011.

The major importers of squid (*Loligo spp*) and other genus (*potas-poton*) are Spain and Italy. Spain saw the most drastic reduction in 2011, reaching the lowest level for many years, mainly because of the significant reduction of imports from India, Argentina and China. Italy's imports of squid were not so dramatic compared to 2010. The main suppliers in Italy, Spain and Thailand, held ground while India, South Africa, Argentina and Peru experienced decline.

Cuttlefish imports have fallen over the last three years, in 2011 they declined 10 %, compared with 2010. The major suppliers are India (*Sepia pharaonis)*, Morocco (*Sepia officinalis, Sepiola rondeleti* and *Rossia macrosoma*), Senegal (*Sepia officinalis* and *Rossia macrosoma*), China and Mauritania (*Sepia officinalis* and *Rossia macrosoma*).

The major reduction of imports is probably due to the fact that the two major importers, Spain and Italy, have followed a negative trend in 2011. Regarding Spain, the reduction occurred with imports from India, China and Mauritania while those from Morocco kept stable. As it is the case for other types of cephalopods, Italy is dependent on intracommunity trade from Spain. The shortage in Spain affected Italian market, which has slightly reduced his supply from external markets.

India is now looking at China not only for processing and re-exporting but as a consumer as well. This may explain why imports from India are declining, not only in squid but also in cuttlefish.

The main suppliers of octopus in 2011 were Morocco, Mexico, Senegal, Mauritania, Indonesia, Vietnam, India and Tunisia. In 2011 imports increased 8 % compared with 2010.

The largest importers of octopus are Spain and Italy. Import of frozen octopus had a peak in 2009 due mainly to the increase of Mauritania imports. Morocco, who was the main supplier by far, is now reducing its share dramatically, while Mexico is doubling from 2009 to 2011. Spain, the major importer, saw a very slight reduction on imports but there was a significant shift among the main suppliers. Imports from Morocco fell 29 % in 2010 while Mauritania, Mexico, Senegal and India increased the share. On the Italian market imports increased. Spain is still the main supplier to Italy, although Mexico is approaching first position. There are also significant increases from Indonesia, Senegal and Tunisia while Morocco and Mauritania suffered declines. In Mauritania the situation of the European vessels and, in particular Spanish vessels, which hold 24 out of 32 licences, remains uncertain, as the agreement UE-Mauritania expired in July 2012.

6. EU Supply Base

6.1 Overview of EU Fish Stocks

At the time of writing this report the full suite of advice from ICES is available but the summary presentations have not yet taken place. ICES is now framing its advice towards MSY by 2015. Several fisheries within the EU are now signed up for multi-annual actions plans and others are in a process of gradual adaptation towards achieving this goal.

The ICES website (www.ices.dk) has all of the species and regions reports and recommendations available and also now has one-page non-technical summaries for each of these.

In the next section is some analysis of key whitefish species that members of AIPCE-CEP have greatest reliance on. Whenever looking at quotas and resources there are ups and downs. We believe that the long term intent to improve the EU fisheries will help in developing new market opportunities going forward and that it is paramount for the processing industry and catching sector to work together in delivering the best outcome for everyone.

6.1.1 EU Quota by Species

Of the 7 major whitefish species (cod, haddock, hake, saithe, whiting, pollack and Atlantic redfish) important to AIPCE-CEP that are caught by EU vessels (these quotas include shares under agreements in NAFO and the Barents Sea (ie non-EU waters) with other countries), the overall annual cumulative quotas decreased by 20,000 tonnes (-5.0 %) from 2010 to 2011 giving a potential total catch of 404,000 tonnes (see tab. 6.1). Cod was marginally up at 159,000 tonnes (+1 %), haddock came down the same amount, saithe fell by 11,000 tonnes to 60,000 and redfish just about halved to 17,000 tonnes. (The 2012 cumulative quotas for these species show a 10 % increase over 2011 to a potential of 444,000 tonnes and we will report on the impact of this in next years study).

It is worth observing that this cumulative quota of around 400,000 for these 7 whitefish species still represents less than half the EU consumption of Alaska pollock and is less than the individual species consumption for either hake or pangasius.

This demonstrates two key points:

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

The ability to accurately reconcile catches is actual surprisingly difficult. In general the EU figures are confirmed about 3 years behind (so we rely on the 2009 confirmed figures and estimations for the years 2010 and 2011 in our tables 6.1 and 6.2). With some EU vessels catching in non-EU waters this makes it problematic to reconcile all the component parts of the catch.

Quotas are potential catches. Within the EU most of the catching activity takes place in mixed fisheries which presents a host of challenges when it comes to management controls. The most obvious of these is the generation of discards under the current method.

As a consequence of this and other factors the potential of quotas is very rarely met in EU mixed fisheries.

Our ability to estimate this is quite poor but we attempted this last year and felt that around 17 % of quota had been left in the water for the 5 key species. This looks to have improved in 2011 as the individual catches for these species we estimate to have increased ahead of quota changes. We will look to refine this data in future reports as it is an important issue for the industry.

6.2 Overview of selected fish Quotas in the World

With the reliance on imports for finfish being as high as 90 %, we now include table 6.3 to track the quota trends in a number of the key commercial species on a worldwide basis broken down regionally. As much as possible we use the websites of the fishery managers/advisors to confirm these numbers but in the absence of the AIPCE-CEP members will provide estimates from their contacts.

It is important to note that the basis for setting quotas in all of these fisheries is based on scientific advice and more often than not extensive stakeholder participation.

We remind everyone that constancy is not a feature of any of the major fisheries analysed in this table. Natural variation in recruitment, changing environmental conditions and greater understanding of the impact of fishing activity all play roles. Management regimes have as a rule become more precautionary around the globe as the ability to demonstrate sustainable and responsible practices becomes a condition for being able to sell to the market. The EU is no different to many other regions that are asking for tangible demonstration of better practices in fishery management and compliance.

During this study we have highlighted many if the key changes to species and regional quotas so we do not intend to repeat these here. However, it is worth just capturing the key trend messages:

- The important Barents Sea stocks are in an extremely healthy condition and ICES advice shows biomass levels at the highest levels in the time series available (60 years+) for cod and haddock. Within this the precautionary approach has resulted in lowering the fishing effort (F) and revising the spawning biomass measure more conservatively.

By nature the biomass, recruitment and survival levels for fish are cyclical and though we have seen quota increases for cod and haddock in 2011 and 2012 this is no guarantee of this happening in the future. Indeed the advice for 2013 is recommending that haddock and saithe be cut in line with these revised limits.

- Saithe catches have generally been weakening across the North Atlantic including in EU waters after peaking in 2008.

- Icelandic cod quota is well below historical peaks but after agreeing new harvest control rules confidence is returning and quota is recovering. As with the Barents Sea other species are tracking downwards. The cod and haddock fisheries are now fully certified to MSC.

- American quotas for Alaska pollock are in an upward part of their cycle and reaching towards the upper limits that the current regulatory ceilings allow (2 million tonnes cap on the cumulative catches of groundfish species in the Bering Sea)

- Russia pollock is stable to marginally increasing.

- New Zealand hoki is benefiting from the extremely cautious approach towards quota setting of the last few years. Catching rates have been very strong in the last two seasons and the expectation is that this fishery will be able to sustain progressively higher activity levels (in context of a fishery of circa 120,000 tonnes).

- Other Southern hemisphere fisheries show varying degrees of improvement. The Southern Africa hake fisheries are gently increasing and Argentinian hake shows the potential to rebound relatively quickly.

- Although not a whitefish within the bounds of this report it is worth mentioning Northern Blue whiting (NBW) as an example of how quickly a fishery can recover given chance. After dramatic decline from more than 2 million tonnes to 500,000 by 2010 the quota was then reduced by 90 % to only 40,000 of which EU vessels had about 15 % share for last year. In 2012 it rebounded to 381,000 of which the EU has 73,464 tonnes. During 2011 the vastly reduced availability did displace some other species into markets such as Africa and China where NBW is consumed directly as a human food source.

The EU remains collectively the largest market for fish. Our 90 % reliance on imports in the whitefish sector should offer encouragement that the EU's role in being able to improve its self-sufficiency has considerable potential.

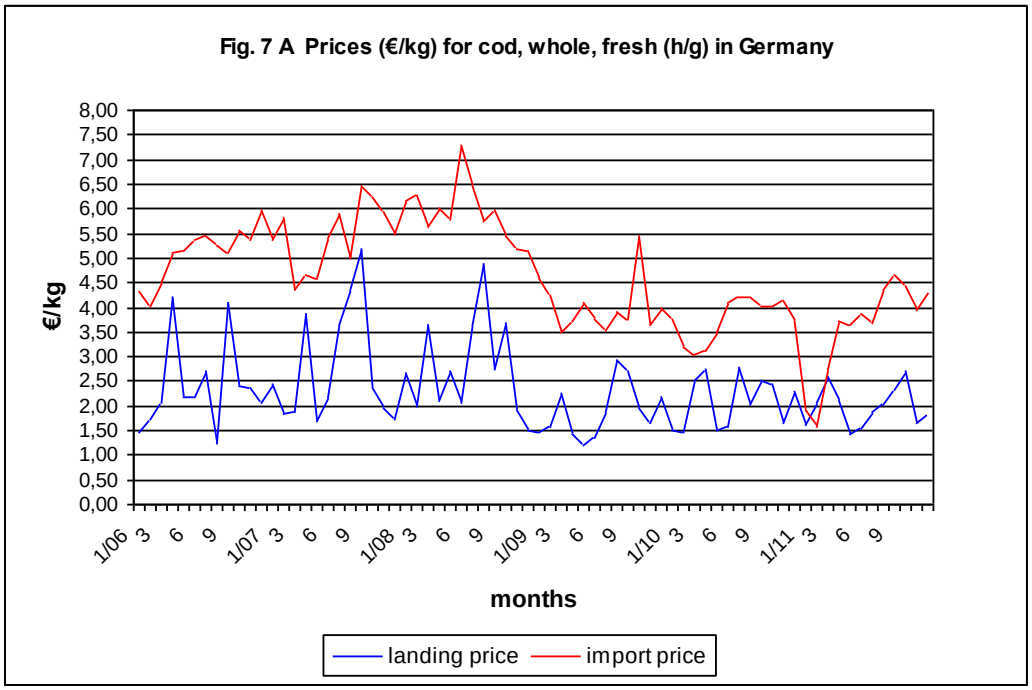
However, it also underlines the need to maintain competitive access to global resources if the processing industry is to be viable and therefore be able to support consumer demand and local supply.

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 there are only a few places in the EU left where there is sufficient concentration of fish landings to warrant block production. In the rare cases where this is the case the species imported differ completely invalidating any direct comparison.

So we have continued using the chart from last year 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 often at a higher price than locally landed fish. Whilst different interpretations can be made of this the gap does seem to have widened again in 2011 other than a short term blip in Q1 and it does not appear that imports are undercutting local values.



Despite the global quota for cod increasing appreciably in 2011 (+12 %) we also do not see a reduction in the per kilogram value of cod in this chart. EU demand grew by 6 % but this means the rest of the world grew faster. As we touched on in last years study it seems that new markets are finding an appetite for fish and cod has been one of the beneficiaries of this new interest. Russia is keeping more product for domestic consumption (although as we pointed out in chapter 4.2.1 the rate of growth has slowed in 2011) and Brazil with its major population (5th biggest) and wealth creation is becoming a magnet for growth in fish consumption.

Quota growth has been at a lesser pace in 2012 but it seems we are seeing the market taking pause and prices are easing back. The news of where quotas are headed in 2013 will probably be key to the next phase of development.

Prices for other whitefish products had differing stories. Alaska pollock price on average was 7 % less in Euros compared to 2010. The greater availability and the unusual product mix of the pollock catchers are key contributors.

Hake prices on the other hand were an average 9 % higher. This is probably explained by the change in the mix of supplies away from the cheaper productus and gayi species from USA and Peru due to quota changes in those regions.

Pangasius prices drifted upwards throughout the year as did cod pricing.

Fig. 7 B EU import average prices (€/kg) for frozen fish fillets

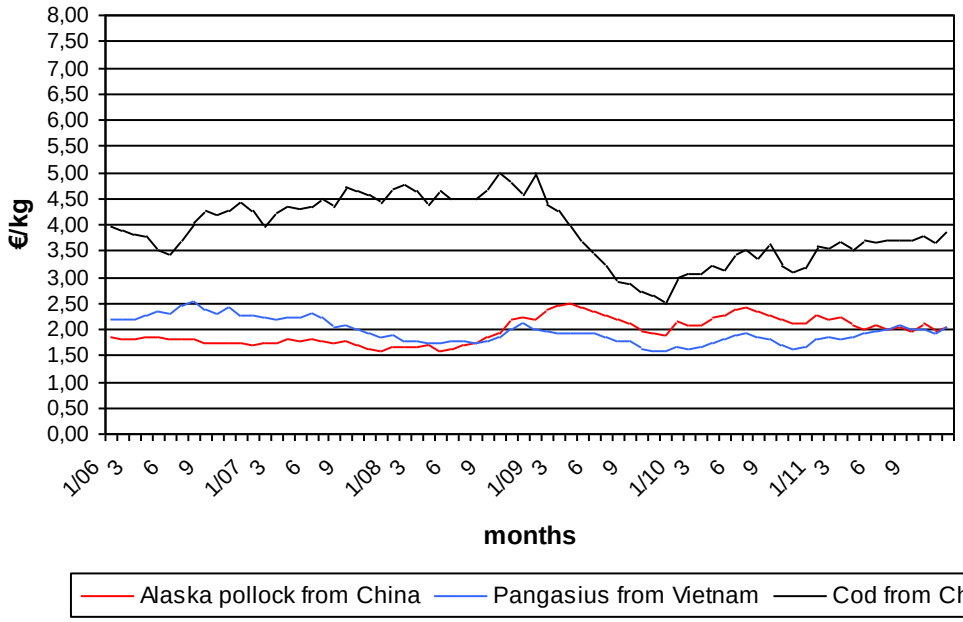
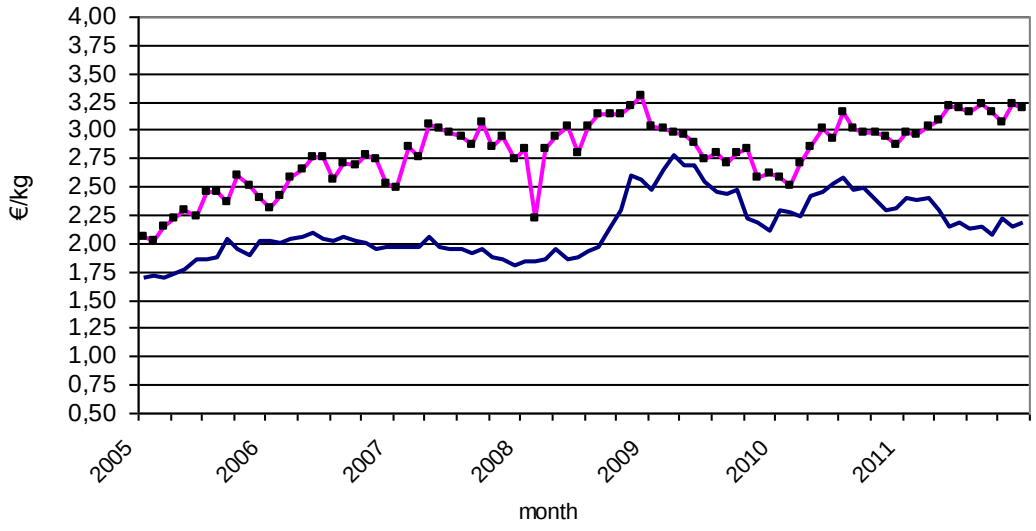


Fig. 7 C Development of EU import prices of frozen fillets of Alaska pollock and hake from third countries



Source: Eurostat-Comext
Chart: AIPCE 2012

The *Euro* versus $ exchange was also a key factor due to the reverse behaviour of the Euro rate in comparison to the previous 12 months. In 2011 the Euro was at its strongest during the middle third of the year reaching a peak of 1.46/$ in June. At the same point in 2010 this rate was at 1.20/$.

When looking at the long term price trends for the two key species of hake and Alaska pollock we can see that hake has reached the highest euro level in this time series probably due to the mix within the species complex. Alaska pollock on the other hand has come back to lower levels. Of course this is a contributory factor in the differing performance of these species within 2011.

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

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.

We are currently in an important phase for the fish/seafood industry here in Europe. The reform of the CFP and CMO will provide the framework for the industry for the years ahead and AIPCE-CEP will continue to offer the benefit if its members experience and knowledge to help in influencing these changes to be pragmatic and effective. AIPCE-CEP represents a key sector of European trade, employment and consumer interaction. Using our authoritative and respected position to best effect is an opportunity we must take full advantage from.

The Finfish Study has now been published for over 20 years against a background of considerable change in the industry here in Europe and globally. Imported fish accounts for close to two thirds of all the raw materials used in the EU but the opportunity for the EU fisheries remains considerable and AIPCE-CEP believes a successful market is best served by having a vibrant and sustainable fishing sector here in the EU working in parallel with 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).

Tab. 4.1 Food balance for fish and fishery products

1000 tonnes live weight

					EU (25)		EU (27)						
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012 b)
Catches a)	7.357	7.414	7.922	7.536	7.230	6.905	5.200	5.136	5.216	5.068	4.954	4.821	4.869
+ Aquaculture production	-	-	-	-	-	-	1.336	1.308	1.373	1.302	1.302	1.302	1.315
- Non-food uses b)	2.100	2.500	3.000	2.600	2.500	2.400	1.000	1.000	1.000	1.000	1.000	1.000	1.000
= Supply for consumption	5.257	4.914	4.922	4.936	4.730	4.505	5.536	5.444	5.589	5.370	5.256	5.123	5.184
+ Imports (Third countries) c)	6.422	7.050	6.735	7.477	7.993	8.355	9.066	9.395	9.440	9.191	9.408	9.548	9.070
= Total supply	11.679	11.964	11.657	12.413	12.723	12.860	14.602	14.839	15.029	14.561	14.664	14.671	14.254
- Exports (Third countries) c)	1.654	1.879	1.752	1.995	2.239	2.196	2.039	2.048	2.068	1.947	2.167	1.870	1.776
= Total consumption	10.025	10.085	9.905	10.418	10.484	10.664	12.563	12.791	12.961	12.614	12.497	12.801	12.478
Total supply (kg/caput) d)	31	32	31	32	28	28	30	30	30	29	29	29	28
by catches for consumption in %	45	41	42	40	37	35	38	37	37	37	36	35	36
by third countries imports in %	55	59	58	60	63	65	62	63	63	63	64	65	64
Supply for consumption (kg/caput) e)	26,6	26,6	26,0	27,2	22,8	23,1	27,1	25,8	26,0	25,2	24,9	25,5	24,8
Self-sufficiency (%) f)	52	49	50	47	45	42	44	43	43	43	42	40	42

Notes: a) Incl. Aquaculture production until 2005.- b) Estimation.- c) Without fishmeal (feed) and fishoil, product weight converted into live weight.-
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 2012

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	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011
Total a)	297	292	298	317	320	2.649	2.564	2.448	2.457	2.616	2.946	2.856	2.746	2.774	2.936
Cod	133	117	126	138	139	822	746	799	822	872	955	863	925	960	1.011
Saithe	58	65	53	52	54	170	176	191	168	132	228	241	244	220	186
Hake	38	46	49	55	61	515	479	471	476	472	553	525	520	531	533
Alaska-Pollock	-	-	-	-	-	875	907	718	723	854	875	907	718	723	854
Haddock	48	47	50	47	46	156	153	164	166	176	204	200	214	213	222
A. Redfish	20	17	20	25	20	74	73	75	61	60	94	90	95	86	80
Hoki	-	-	-	-	-	37	30	30	41	50	37	30	30	41	50
Plaice b)	64	62	65	75	72	12	9	7	6	6	76	71	72	81	78

Species	Total supply: by catches (%)					Total supply: by third countries imports (%)					Total supply: by imports from China (%)				
Year	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011
Total a)	10	10	11	11	11	90	90	89	89	89	22	21	24	25	26
Cod	14	14	14	14	14	86	86	86	86	86	18	12	14	15	18
Saithe	25	27	22	24	29	75	73	78	76	71	7	9	11	13	18
Hake	7	9	9	10	11	93	91	91	90	89	1	1	1	2	2
Alaska-Pollock	-	-	-	-	-	100	100	100	100	100	41	45	55	54	50
Haddock	24	24	23	22	21	76	77	77	78	79	16	18	18	20	21
A. Redfish	21	19	21	29	25	79	81	79	71	75	31	26	21	24	20
Hoki	-	-	-	-	-	100	100	100	100	100	10	28	38	32	24
Plaice b)	84	87	90	93	92	16	13	10	7	8	33	25	11	9	5

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 2012

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 (%)
	2008	2009	2010	2011	2011	11/10
Whole, fresh	**154.916**	**155.792**	**141.541**	**132.719**	**100**	**-6**
of it from Norway	44.588	52.867	69.324	71.344	54	3
Iceland	54.230	48.326	28.132	22.584	17	-20
Faroe Isles	9.748	11.466	11.419	7.235	5	-37
Russia	387	442	802	952	1	-
South Africa	16.185	15.041	12.069	11.316	9	-6
Namibia	6.183	6.700	4.089	4.843	4	18
Whole, frozen	**269.911**	**283.910**	**255.464**	**264.870**	**100**	**4**
of it from Norway	49.823	69.453	71.126	80.785	30	14
Iceland	16.297	21.894	13.161	13.870	5	5
Faroe Isles	865	1.559	1.559	1.196	0	-23
Russia	51.680	65.952	49.040	55.290	21	13
South Africa	14.163	14.557	14.552	17.482	7	20
Argentina	19.994	19.559	16.870	14.003	5	-17
Namibia	13.808	15.310	11.027	8.767	3	-20
Fillet, fresh c)	**49.376**	**67.884**	**67.442**	**67.946**	**100**	**1**
of it from Norway	17.238	22.605	19.769	17.561	26	-11
Iceland	26.524	39.924	42.334	46.175	68	9
Faroe Isles	5.313	5.320	5.145	4.055	6	-21
Fillet, frozen	**1.672.279**	**1.497.890**	**1.545.422**	**1.690.376**	**100**	**9**
of it from Norway	55.986	69.325	68.112	61.941	4	-9
Iceland	135.888	155.335	133.460	127.390	8	-5
Faroe Isles	60.486	58.863	59.007	37.976	2	-36
Russia	160.496	140.640	133.177	156.225	9	17
South Africa	34.452	33.900	35.334	39.158	2	11
Argentina	85.418	89.306	90.326	83.923	5	-7
Namibia	107.857	105.194	112.751	117.209	7	4
USA	342.136	208.867	239.466	319.339	19	33
New Zealand	20.884	18.719	27.589	36.893	2	34
China	606.127	565.854	584.827	645.301	38	10
Meat, frozen	**130.703**	**135.719**	**130.229**	**136.791**	**100**	**5**
of it from Norway	1.894	2.659	2.740	3.358	2	23
Iceland	11.553	11.139	13.347	10.833	8	-19
Faroe Isles	13.481	13.973	7.390	2.510	2	-66
Russia	26.366	25.940	23.088	27.723	20	20
USA	27.732	33.445	28.995	40.773	30	41
Argentina	8.232	11.214	10.519	6.548	5	-38
Namibia	18.054	23.009	19.412	20.400	15	5
China	12.821	13.391	11.839	17.303	13	46
Fish and Fillet, dry/salted	**287.660**	**306.942**	**317.061**	**323.384**	**100**	**2**
of it from Norway	160.736	171.929	192.238	192.019	59	0
Iceland	73.715	90.731	82.202	84.102	26	2
Supply (Catches + Import)	2.857.389	2.746.834	2.775.197	2.935.300	100	6
of it catches of quoted species	292.545	298.697	318.038	319.213	11	0
Import from third countries	2.564.844	2.448.137	2.457.159	2.616.087	89	6
of it from China d)	627.026	589.274	607.236	675.066	26	11
Norway	330.266	388.639	423.309	427.008	16	1
USA d)	442.209	279.392	324.168	413.696	16	28
Iceland	318.207	367.407	312.637	304.955	12	-2
Russia d)	235.208	229.730	200.526	232.351	9	16
Namibia d)	145.903	150.213	147.280	151.176	6	3
Argentina d)	114.548	120.794	118.445	104.775	4	-12
Faroe Isles d)	107.561	106.014	102.868	71.512	3	-30
South Africa d)	69.586	65.898	63.449	69.348	3	9
New Zealand d)	25.357	22.779	31.786	40.162	2	26
Uruguay d)	22.559	17.085	26.333	30.859	1	17
Chile d)	38.019	37.537	34.436	28.375	1	-18
Peru d)	24.566	21.706	21.800	20.040	1	-8

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 2012

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

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
Whole, fresh	**28.463**	**39.167**	**41.146**	**41.823**	**100**	**2**
of it from Argentina	19	-	-	-	-	-
Faroe Isles	2.106	2.560	3.822	2.610	6	-32
Iceland	7.983	9.933	4.681	4.772	11	2
USA	23	-	-	-	-	-
Norway	18.202	26.577	32.552	34.419	82	6
Russia	-	24	-	-	-	-
South Africa	-	-	11	-	-	-
Whole, frozen	**125.311**	**127.521**	**116.684**	**120.356**	**100**	**3**
of it from Argentina	-	-	-	-	-	-
Faroe Isles	63	123	372	236	0	-37
Iceland	1.037	1.254	845	443	0	-48
USA	50.313	38.148	43.430	38.281	32	-12
Norway	16.250	19.764	20.859	24.876	21	19
Russia	44.473	59.048	41.592	47.273	39	14
South Africa	-	-	-	-	-	-
Fillet, fresh	**35.568**	**55.753**	**55.014**	**56.239**	**100**	**2**
of it from Faroe Isles	639	1.096	1.029	1.146	2	11
Iceland	21.104	33.372	35.487	38.216	68	8
Norway	13.616	21.249	18.306	16.726	30	-9
Fillet, frozen	**248.632**	**249.171**	**271.806**	**303.384**	**100**	**12**
of it from Argentina	-	45	-	13	0	-
Chile	94	-	-	-	-	-
China	125.967	97.096	111.241	132.779	44	19
Faroe Isles	13.374	12.494	13.254	14.409	5	9
Iceland	49.394	70.058	65.216	67.681	22	4
USA	644	109	1.441	670	0	-53
New Zealand	58	9	4	-	-	-
Norway	21.912	28.387	35.296	31.377	10	-11
Russia	25.704	28.814	32.879	44.451	15	35
South Africa	-	-	-	-	-	-
Meat, frozen	**20.400**	**20.794**	**20.987**	**26.374**	**100**	**26**
of it from Argentina	-	-	-	-	-	-
China	6.624	6.418	4.501	8.971	34	99
Faroe Isles	113	233	304	211	1	-31
Iceland	6.687	6.632	8.555	7.556	29	-12
USA	3.416	2.970	3.500	3.237	12	-8
Norway	1.497	2.426	2.128	3.141	12	48
South Africa	-	-	-	-	-	-
Fish and Fillet, dry/salted	**287.660**	**306.942**	**317.061**	**323.384**	**100**	**2**
of it from Iceland	73.715	90.731	82.202	84.102	26	2
Norway	160.736	171.929	192.238	192.019	59	0
Supply (Catches + Import)	863.431	925.581	961.148	1.010.188	100	5
of it catches of quoted species	117.396	126.234	138.449	138.629	14	0
Import from third countries	746.035	799.347	822.699	871.559	86	6
of it from Norway	232.214	270.334	301.379	302.559	35	0
Iceland	159.920	211.980	196.986	202.770	23	3
China c)	140.386	113.243	126.028	153.976	18	22
Russia c)	79.740	97.593	82.765	105.845	12	28
USA c)	60.109	43.143	50.014	43.782	5	-12
Faroe Isles c)	33.905	31.320	37.010	37.033	4	0
Chile c)	94	9	-	-	-	-
New Zealand c)	58	9	4	-	-	-
Argentina c)	19	45	-	13	0	-

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 2012

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

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
Whole, fresh	**11.702**	**14.363**	**13.029**	**10.341**	**100**	**-21**
of it from Argentina	-	-	-	-	-	-
Faroe Isles	2.144	3.705	1.309	759	7	-42
Iceland	1.360	1.238	789	1.039	10	32
Namibia	-	-	-	-	-	-
Norway	8.194	9.420	10.931	8.543	83	-22
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	**22.856**	**28.303**	**22.593**	**24.182**	**100**	**7**
of it from Argentina	-	-	-	-	-	-
Faroe Isles	64	22	27	1	0	-97
Iceland	295	402	400	425	2	6
Namibia	-	-	-	-	-	-
Norway	21.875	26.767	22.171	23.511	97	6
Russia	213	69	46	514	2	1027
South Africa	-	-	-	-	-	-
Fillet, fresh	**9.238**	**7.241**	**7.539**	**5.928**	**100**	**-21**
of it from Faroe Isles	4.673	4.122	4.038	2.909	49	-28
Iceland	950	1.806	2.067	2.204	37	7
Norway	3.563	1.313	1.434	815	14	-43
Fillet, frozen	**117.058**	**124.017**	**115.219**	**87.649**	**100**	**-24**
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	13	0	-
China	14.565	20.305	22.246	23.517	27	6
Faroe Isles	42.132	43.178	43.004	22.169	25	-48
Iceland	40.448	45.598	36.781	33.006	38	-10
Namibia	-	-	-	-	-	-
New Zealand	-	-	-	-	-	-
Norway	18.822	14.212	12.200	8.357	10	-31
Russia	217	113	308	51	0	-83
South Africa	-	-	-	-	-	-
Meat, frozen	**15.475**	**16.612**	**9.617**	**4.052**	**100**	**-58**
of it from Argentina	-	-	-	-	-	-
China	394	382	116	134	3	16
Iceland	2.037	2.456	2.495	1.555	38	-38
Faroe Isles	12.679	13.563	6.831	2.208	54	-68
Namibia	-	-	-	-	-	-
Norway	328	203	175	155	4	-11
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	241.232	243.783	220.360	185.703	100	-16
of it catches of quoted species	64.904	53.247	52.362	53.549	29	2
Import from third countries	176.328	190.536	167.998	132.154	71	-21
of it from Norway	52.781	51.916	46.910	41.382	31	-12
Iceland	45.088	51.499	42.532	38.231	29	-10
Faroer Islands	61.691	64.591	55.210	28.045	21	-49
China c)	15.080	20.747	22.368	23.668	18	6
Russia c)	430	182	353	565	0	60

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.-
Published by: AIPCE 2012

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

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
Whole, fresh	**19.340**	**18.450**	**16.602**	**13.161**	**100**	**-21**
of it from Argentina	-	-	-	-	-	-
Faroe Isles	440	936	1.718	596	5	-65
Iceland	15.559	13.712	11.351	10.036	76	-12
Namibia	-	-	-	-	-	-
Norway	3.145	3.622	3.398	2.470	19	-27
Russia	2	8	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	**16.766**	**22.949**	**15.231**	**20.263**	**100**	**33**
of it from Argentina	45	66	-	1	0	-
Faroe Isles	722	1.183	413	410	2	-1
Iceland	12.910	19.480	11.698	12.726	63	9
Namibia	-	-	-	-	-	-
Norway	1.059	1.079	1.103	994	5	-10
Russia	1.014	1.002	1.724	2.351	12	36
South Africa	-	-	-	-	-	-
Fillet, fresh	**4.570**	**4.890**	**4.889**	**5.779**	**100**	**18**
of it from Faroe Isles	-	102	78	-	-	-
Iceland	4.470	4.745	4.780	5.755	100	20
Norway	59	42	30	20	0	-34
Fillet, frozen	**32.166**	**28.415**	**23.792**	**20.549**	**100**	**-14**
of it from Argentina	20	-	-	-	-	-
Chile	-	-	-	-	-	-
China	19.065	15.580	14.837	11.752	57	-21
Faroe Isles	164	243	92	163	1	76
Iceland	12.472	12.017	8.711	8.343	41	-4
Namibia	-	-	-	-	-	-
New Zealand	-	-	7	6	0	-17
Norway	116	5	54	35	0	-35
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Meat, frozen	**439**	**234**	**318**	**413**	**100**	**30**
of it from Argentina	-	-	-	-	-	-
China	99	-	59	73	18	-
Faroe Isles	-	-	-	-	-	-
Iceland	329	219	259	304	74	17
Namibia	-	-	-	-	-	-
Norway	-	-	-	-	-	-
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	90.352	95.138	86.017	80.020	100	-7
of it catches of quoted species	17.071	20.199	25.186	19.856	25	-21
Import from third countries	73.281	74.939	60.831	60.164	75	-1
of it from Iceland	45.740	50.173	36.799	37.165	62	1
China c)	19.165	15.711	14.979	11.867	20	-21
Norway	4.378	4.749	4.585	3.519	6	-23
Russia c)	1.016	1.010	1.724	2.351	4	36
Faroe Isles	1.326	2.465	2.301	1.169	2	-49
New Zealand c)	-	-	7	6	0	-
Argentina c)	66	66	-	1	0	-
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.-

Source: Eurostat-Comext; EU catch report.-
Published by: AIPCE 2012

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

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
Whole, fresh	**46.567**	**38.620**	**36.055**	**34.299**	**100**	**-5**
of it from Argentina	-	-	-	-	-	-
Faroe Isles	5.057	4.257	4.567	3.268	10	-28
Iceland	29.326	23.430	11.311	6.736	20	-40
Namibia	-	-	-	-	-	-
Norway	12.134	10.933	20.177	24.295	71	20
Russia	41	-	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	**15.867**	**26.502**	**32.870**	**35.724**	**100**	**9**
of it from Argentina	-	-	-	-	-	-
Faroe Isles	17	154	747	552	2	-26
Iceland	2.056	758	218	275	1	26
Namibia	-	-	-	-	-	-
Norway	9.973	21.170	26.482	30.599	86	16
Russia	3.722	4.326	5.221	4.257	12	-18
South Africa	-	-	-	-	-	-
Fillet, frozen	**86.291**	**95.339**	**92.902**	**103.017**	**100**	**11**
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	25.448	27.633	31.695	36.360	35	15
Faroe Isles	4.817	2.947	2.657	1.235	1	-54
Iceland	33.575	27.658	22.752	18.359	18	-19
Namibia	-	-	-	-	-	-
New Zealand	-	-	-	-	-	-
Norway	15.125	25.953	20.545	21.959	21	7
Russia	6.144	9.761	13.335	22.777	22	71
South Africa	-	-	-	-	-	-
Meat, frozen	**4.604**	**3.373**	**4.346**	**2.950**	**100**	**-32**
of it from Argentina	-	-	-	-	-	-
China	1.345	1.334	1.608	1.116	38	-31
Faroe Isles	690	177	255	92	3	-64
Iceland	2.500	1.832	2.039	1.418	48	-30
Namibia	-	-	-	-	-	-
Norway	70	29	437	61	2	-86
Russia	-	-	8	190	6	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	200.462	213.951	212.884	222.280	100	4
of it catches of quoted species	47.133	50.117	46.711	46.291	21	-1
Import from third countries	153.329	163.834	166.173	175.989	79	6
of it from Norway	37.302	58.085	67.640	76.914	44	14
China c)	26.824	29.017	33.394	37.476	21	12
Russia c)	9.906	14.087	18.564	27.223	15	47
Iceland	67.457	53.679	36.319	26.788	15	-26
Faroe Isles	10.581	7.535	8.225	5.146	3	-37
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 2012

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

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
Whole, fresh	**47.206**	**44.096**	**33.643**	**32.350**	**100**	**-4**
of it from Argentina	885	715	730	301	1	-59
Chile	11.152	11.248	9.427	7.300	23	-23
Namibia	6.183	6.700	4.089	4.843	15	18
Norway	1.303	1.255	1.224	907	3	-26
Peru	-	-	-	-	-	-
USA	344	411	802	952	3	19
South Africa	16.185	15.041	12.058	11.316	35	-6
Uruguay	-	-	-	-	-	-
Whole, frozen	**78.819**	**76.837**	**66.837**	**62.974**	**100**	**-6**
of it from Argentina	19.948	19.493	16.870	14.002	22	-17
Chile	14.930	14.573	11.049	8.855	14	-20
Namibia	13.808	15.310	11.027	8.724	14	-21
Norway	167	243	259	499	1	93
Peru	70	-	-	11	0	-
USA	2.254	1.508	457	894	1	96
South Africa	14.163	14.557	14.552	17.482	28	20
Uruguay	77	-	42	-	-	-
Fillet, frozen	**307.685**	**295.029**	**321.425**	**325.854**	**100**	**1**
of it from Argentina	85.204	89.261	90.325	83.903	26	-7
Chile	5.770	3.746	6.223	5.547	2	-11
China	6.259	3.238	7.519	8.569	3	14
Namibia	107.857	105.194	112.751	117.209	36	4
Peru	21.474	18.528	18.498	17.251	5	-7
Russia	-	4	-	-	-	-
South Africa	34.410	33.900	35.334	39.158	12	11
Uruguay	18.177	13.572	20.530	24.999	8	22
USA	27.927	26.884	29.707	28.613	9	-4
Meat, frozen	**45.418**	**55.525**	**53.547**	**51.197**	**100**	**-4**
of it from Argentina	8.232	11.214	10.519	6.548	13	-38
Chile	6.074	7.904	7.524	6.471	13	-14
China	-	321	66	-	-	-
Namibia	18.054	23.009	19.412	20.400	40	5
Norway	-	-	-	-	-	-
Peru	2.179	2.582	2.994	1.893	4	-37
USA	4.062	4.628	8.117	11.144	22	37
South Africa	4.757	2.358	1.472	1.353	3	-8
Uruguay	1.873	2.003	3.265	3.253	6	0
Supply (Catches + Import)	525.170	520.387	530.782	533.262	100	0
of it catches of quoted species	46.041	48.900	55.330	60.888	11	10
Import from third countries	479.129	471.487	475.452	472.374	89	-1
of it from Namibia c)	145.903	150.213	147.280	151.176	32	3
Argentina c)	114.269	120.683	118.445	104.753	22	-12
South Africa	69.586	65.898	63.439	69.348	15	9
USA	34.587	33.430	39.513	41.604	9	5
Uruguay	22.559	17.085	26.333	30.859	7	17
Chile c)	37.926	37.471	34.223	28.173	6	-18
Peru	24.566	21.706	21.800	20.040	4	-8
China c)	6.259	3.559	7.628	8.569	2	12
Norway	1.470	1.498	1.491	1.476	0	-1
Russia c)	-	16	2	1	0	-18

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 2012

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 (%)
	2008	2009	2010	2011	2011	11/10
Whole, fresh c)	**1.637**	**1.096**	**1.066**	**745**	**100**	**-30**
of it from Argentina	-	-	-	-	-	-
Faroe Isles	0	9	2	3	0	26
Iceland	2	13	1	-	-	-
Norway	1.610	1.059	1.041	710	95	-32
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
USA	-	-	-	-	-	-
Whole, frozen d)	**10.283**	**1.682**	**1.123**	**1.184**	**100**	**5**
of it from Argentina	-	-	-	-	-	-
Faroe Isles	-	-	-	-	-	-
Iceland	-	-	-	-	-	-
Namibia	-	-	-	-	-	-
Norway	499	431	253	306	26	21
Russia	5	-	-	2	0	-
South Africa	-	-	-	-	-	-
USA	9.419	1.160	816	662	56	-19
Fillet, frozen e)	**850.456**	**675.560**	**679.251**	**800.341**	**100**	**18**
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	406.381	390.702	384.310	420.215	53	9
Faroe Islands	-	-	-	-	-	-
Iceland	-	-	-	-	-	-
Namibia	-	-	-	-	-	-
Norway	7	767	8	142	0	100
Russia	128.432	101.949	86.655	88.947	11	3
South Africa	-	-	-	-	-	-
USA	313.557	181.874	208.319	289.993	36	39
Meat, frozen e)	**44.368**	**39.181**	**41.414**	**51.806**	**100**	**25**
of it from Argentina	-	-	-	-	-	-
China	4.359	4.936	5.490	7.010	14	28
Faroes Islands	-	-	-	-	-	-
Iceland	-	-	-	-	-	-
Norway	-	-	-	-	-	-
Russia	15.679	14.894	10.462	7.418	14	-29
South Africa	-	-	-	-	-	-
USA	24.316	19.464	25.495	37.537	72	47
Supply (Catches + Import)	906.744	717.519	722.854	854.076	100	18
of it catches of quoted species	-	-	-	-	-	-
Import from third countries	906.744	717.519	722.854	854.076	100	18
of it from China f)	410.870	395.666	389.853	427.357	50	10
USA	347.292	202.498	234.630	328.192	38	40
Russia	144.116	116.843	97.117	96.366	11	-1
Norway	2.117	2.257	1.302	1.158	0	-11
Iceland	2	13	1	-	-	-100
Faroe Isles	0	9	2	3	0	26
Argentina	-	-	-	-	-	-
Chile f)	-	-	-	-	-	-
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.- e) Alaska-Pollock (Theragra chalcogramma).- f) Incl. quantities not listed above.-

Source: Eurostat-Comext; EU catch report.-
Published by: AIPCE 2012

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

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
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	**9**	**116**	**126**	**188**	**100**	**49**
of it from Argentina	-	-	-	-	-	-
French South. Territ.	-	80	114	117	62	-
Iceland	-	-	-	-	-	-
China	-	-	-	44	23	-
New Zealand	9	5	7	27	14	312
Norway	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Thailand	-	-	-	-	-	-
USA	-	-	-	-	-	-
Fillet, frozen	**29.990**	**30.359**	**41.025**	**49.583**	**100**	**21**
of it from Argentina	194	-	0	8	0	-
Chile	-	57	213	188	0	-12
China	8.442	11.300	12.979	12.110	24	-7
Faroe Isles	-	-	-	-	-	-
Iceland	-	4	-	-	-	-
Namibia	-	-	-	-	-	-
New Zealand	20.826	18.710	27.577	36.887	74	34
Norway	4	-	1	-	-	-
South Africa	42	-	-	-	-	-
Thailand	69	-	-	-	-	-
USA	8	-	-	64	0	-
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)	29.999	30.474	41.151	49.771	100	21
of it catches of quoted species	-	-	-	-	-	-
Import from third countries	29.999	30.474	41.151	49.771	100	21
of it from New Zealand c)	20.834	18.715	27.584	36.914	74	34
China c)	8.442	11.332	12.985	12.153	24	-6
Chile c)	-	57	213	188	0	-12
Faroe Isles	-	80	114	117	0	-
USA c)	8	-	-	64	0	-
Argentina c)	194	-	0	8	0	-
Thailand c)	69	-	-	-	-	-
South Africa c)	42	-	-	-	-	-
Norway	4	-	1	-	-	-
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.-
Published by: AIPCE 2012

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

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
Whole, fresh	**4.708**	**4.533**	**3.849**	**3.261**	**100**	**-15**
of it from Faroe Isles	200	169	193	219	7	13
Iceland	2.869	2.820	2.126	1.350	41	-36
Norway	1.636	1.540	1.529	1.692	52	11
Russia	0	-	-	-	-	-
USA	-	0	-	-	-	-
Whole, frozen	**570**	**518**	**313**	**297**	**100**	**-5**
of it from Faroe Isles	7	1	-	5	2	-
Iceland	214	208	149	47	16	-69
Norway	13	17	16	0	0	-97
Russia	65	131	-	4	1	-
USA	6	-	-	0	0	-
Fillet, frozen	**4.091**	**2.354**	**1.989**	**1.997**	**100**	**0**
of it from China	2.257	791	531	204	10	-62
Faroe Isles	2	2	1	3	0	450
Iceland	1.774	1.560	1.449	1.791	90	24
Norway	-	2	9	-	-	-
Russia	17	-	-	-	-	-
Supply (Catches + Import)	71.466	72.060	81.287	82.769	100	2
of it catches of quoted species	62.098	64.655	75.136	77.214	93	3
Import from third countries	9.368	7.405	6.151	5.555	7	-10
of it from Iceland	4.857	4.588	3.724	3.188	57	-14
Norway	1.648	1.559	1.554	1.693	30	9
China	2.344	819	576	305	5	-47
Faroe Isles	209	172	194	227	4	17
Russia	82	131	-	4	0	-
USA	6	0	-	0	0	-

Notes: a) Pleuronectes Platessa.-

Source: Eurostat-Comext; EU catch report.-
Published by: AIPCE 2012

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

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
Surimi, frozen	**184.749**	**144.752**	**183.425**	**212.441**	**100**	**16**
of it from USA	77.952	64.262	77.666	115.050	54	48
Chile	25.733	21.074	16.618	5.636	3	-66
Vietnam	52.243	36.599	49.428	58.047	3	17
Thailand	11.880	11.253	16.914	10.859	5	-36
Argentina	3.841	3.079	6.280	2.476	1	-61
India	5.796	3.333	10.586	12.568	6	19
China	5.930	3.314	1.891	802	0	-58
Faroe Isles	-	-	-	614	0	-
Russia	257	1.874	89	172	0	94
Surimipresentation, frozen	**212.238**	**191.084**	**182.314**	**169.961**	**100**	**-7**
of it from China	81.163	75.337	71.803	65.199	38	-9
Thailand	72.564	57.036	56.644	50.831	30	-10
India	33.106	39.882	38.766	39.459	23	2
South Korea	11.653	9.504	9.220	9.804	6	6
Malaysia	6.460	12	1.325	1.114	1	-16
Japan	1.071	809	699	1.048	1	50
USA	637	524	335	704	0	110
Peru	3.620	3.609	1.819	91	0	-95
Russia	386	400	-	-	-	-
Supply (Catches + Import)	396.859	336.596	370.082	386.241	104	4
of it catches of quoted species	-	-	-	-	-	0
Import from third countries	396.859	336.596	370.082	386.241	104	4
of it from USA	78.590	64.786	78.001	115.754	21	48
China c)	87.094	78.651	73.694	66.001	20	-10
Thailand	84.444	68.288	73.558	61.690	20	-16
Vietnam c)	52.475	39.585	52.113	60.708	14	16
India	38.903	43.215	49.351	52.027	13	5
South Korea c)	11.699	9.506	9.220	9.804	2	6
Peru c)	4.444	4.374	4.700	5.789	1	23
Chile c)	25.733	21.074	16.618	5.636	4	-66
Argentina c)	3.841	3.079	6.280	2.476	2	-61
Malaysia c)	6.588	12	1.325	1.114	0	-16
Japan c)	1.071	809	699	1.048	0	50
Russia	643	2.274	89	172	0	94

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.-
Published by: AIPCE 2012

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

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010 d)	2011	2011	11/10
Whole, fresh	**3.197**	**2.568**	**2.413**	**2.736**	**100**	**13**
of it from Kenia	221	3	6	244	9	3832
Norway	3	1	1	1	0	120
Russia	2	66	46	50	2	10
Tansania	113	132	96	193	7	101
Uganda	2.620	2.268	2.168	1.993	73	-8
Whole, frozen	**39.078**	**35.331**	**33.668**	**41.364**	**100**	**23**
of it from Bangladesh	4.692	3.640	2.856	4.268	10	49
China	5.988	8.248	9.901	13.511	33	36
Indonesia	1.484	1.404	862	1.629	4	89
Kenia	985	642	856	794	2	-7
Tansania	876	997	991	1.098	3	11
Thailand	9.273	6.494	4.847	3.899	9	-20
Uganda	1.795	1.407	1.817	1.158	3	-36
Vietnam	1.730	2.159	2.077	2.468	6	19
Fillet, fresh	**76.892**	**59.774**	**4.824**	**3.439**	**100**	**-29**
of it from Kenia	5.684	4.848	361	30	1	-92
Russia	921	1.136	921	628	18	-32
Tansania	37.086	26.401	737	851	25	15
Uganda	29.917	24.744	1.606	1.067	31	-34
Vietnam	499	1.077	397	-	-	-
Fillet, frozen	**766.277**	**792.858**	**65.314**	**46.745**	**100**	**-28**
of it from China	22.914	24.925	6.401	8.078	17	26
Indonesia	4.447	4.022	625	73	0	-88
China	22.914	24.925	6.401	8.078	17	26
Kenia	3.391	1.967	120	-	-	-
Kasachstan	15.293	17.613	15.570	13.767	29	-12
Russia	8.270	5.382	5.842	6.972	15	19
Tansania	15.164	13.290	1.033	748	2	-28
Uganda	3.580	2.974	547	233	0	-57
Vietnam	688.650	718.008	32.217	14.757	32	-54
Meat, fresh	**5.110**	**3.997**	**2.821**	**3.222**	**100**	**14**
of it from Norway	128	282	435	658	20	51
Sri Lanka	1.669	926	636	401	12	-37
USA	1.342	1.374	614	648	20	6
Meat, frozen	**16.171**	**13.743**	**9.771**	**8.309**	**258**	**-15**
of it from Chile	5.247	3.544	1.542	1.708	21	11
Norway	902	997	1.215	834	10	-31
Vietnam	6.244	5.666	3.479	2.371	29	-32
Supply (Catches + Import)	906.726	908.271	118.811	105.815	100	-11
of it catches of quoted species	-	-	-	-	-	-
Import from third countries	906.726	908.271	118.811	105.815	100	-11
of it from Vietnam c)	697.122	726.910	38.170	19.596	19	-49
Kasachstan c)	15.614	17.875	15.893	14.106	13	-11
China c)	23.952	26.272	7.924	9.748	9	23
Russia c)	9.501	6.719	6.982	7.855	7	13
Uganda c)	38.015	31.455	6.161	4.451	4	-28
Bangladesh c)	4.692	3.640	2.856	4.268	4	49
Thailand c)	10.396	7.387	4.940	3.959	4	-20
Tansania c)	53.239	40.821	2.875	2.890	3	1
Kenia c)	10.431	7.460	1.343	1.067	1	-21

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 (%)
	2008 a)	2009 a)	2010	2011	2011	11/10
Fillet, fresh	-	-	**7.000**	**5.885**	**100**	**-16**
of it from Bangladesh	-	-	-	-	-	-
China	-	-	-	-	-	-
Ecuador	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-
Kenya	-	-	-	-	-	-
Thailand	-	-	22	-	-	-
Tanzania	-	-	-	-	-	-
Uganda	-	-	-	-	-	-
Vietnam	-	-	6.978	5.885	100	-16
Zimbabwe	-	-	-	-	-	-
Fillet, frozen	-	-	**696.961**	**610.602**	**100**	**-12**
of it from Bangladesh	-	-	222	130	0	-41
China	-	-	593	1.235	0	108
Ecuador	-	-	-	-	-	-
Indonesia	-	-	-	49	0	-
Kenya	-	-	-	-	-	-
Thailand	-	-	97	98	0	1
Tanzania	-	-	-	-	-	-
Uganda	-	-	31	-	-	-
Vietnam	-	-	695.942	609.058	100	-12
Zimbabwe	-	-	-	-	-	-
Supply (Catches + Import)	-	-	703.961	616.487	100	-12
of it catches of quoted species					-	-
Import from third countries	-	-	703.961	616.487	100	-12
of it from Vietnam	-	-	702.920	614.942	100	-13
China	-	-	593	1.235	0	108
Bangladesh	-	-	222	130	0	-41
Thailand	-	-	119	98	0	-17
Uganda	-	-	31	-	-	-

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

Source: Eurostat-Comext; EU catch report.-
Published by: AIPCE 2012

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

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008 a)	2009 a)	2010	2011	2011	11/10
Fillet, fresh	-	-	**47.703**	**46.718**	**100**	**-2**
of it from Bangladesh	-	-	-	-	-	-
China	-	-	-	-	-	-
Ecuador	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-
Kenya	-	-	4.463	5.124	11	-
Thailand	-	-	-	-	-	-
Tanzania	-	-	21.249	22.645	48	-
Uganda	-	-	21.986	18.944	41	-
Vietnam	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-
Fillet, frozen	-	-	**22.649**	**14.827**	**100**	**-35**
of it from Bangladesh	-	-	-	-	-	-
China	-	-	22	-	-	-
Ecuador	-	-	-	-	-	-
Indonesia	-	-	-	47	0	-
Kenya	-	-	3.446	1.094	7	-68
Thailand	-	-	11	-	-	-
Tanzania	-	-	14.917	10.625	72	-29
Uganda	-	-	4.142	2.953	20	-29
Vietnam	-	-	111	107	1	-4
Zimbabwe	-	-	-	-	-	-
Supply (Catches + Import)	-	-	70.352	61.546	100	-13
of it catches of quoted species					-	-
Import from third countries	-	-	70.352	61.546	100	-13
of it from Tansania	-	-	36.166	33.270	54	-8
Uganda	-	-	26.128	21.897	36	-16
Kenya	-	-	3.446	1.094	2	-68
Vietnam	-	-	111	107	0	-4
Indonesia	-	-	-	47	0	-
China	-	-	22	-	-	-
Zimbabwe	-	-	5	-	-	-

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

Source: Eurostat-Comext; EU catch report.-
Published by: AIPCE 2012

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

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008 a)	2009 a)	2010	2011	2011	11/10
Whole, fresh	-	-	**75**	**85**	**100**	**14**
of it from Bangladesh	-	-	-	-	-	-
China	-	-	22	56	66	152
Ecuador	-	-	8	8	9	-1
Indonesia	-	-	-	-	-	-
Kenya	-	-	-	-	-	-
Thailand	-	-	14	10	12	-30
Tanzania	-	-	-	-	-	-
Uganda	-	-	-	-	-	-
Vietnam	-	-	30	11	13	-64
Zimbabwe	-	-	22	56	66	152
Fillet, frozen	-	-	**42.135**	**41.913**	**100**	**-1**
of it from Bangladesh	-	-	-	-	-	-
China	-	-	37.159	36.206	86	-3
Ecuador	-	-	142	147	0	3
Indonesia	-	-	3.360	3.681	9	9
Kenya	-	-	-	-	-	-
Thailand	-	-	932	699	2	-25
Tanzania	-	-	-	13	0	-
Uganda	-	-	-	-	-	-
Vietnam	-	-	362	942	2	160
Zimbabwe	-	-	3	-	-	-
Supply (Catches + Import)	-	-	42.210	41.998	100	-1
of it catches of quoted species					-	-
Import from third countries	-	-	42.210	41.998	100	-1
of it from China	-	-	37.181	36.262	86	-2
Indonesia	-	-	3.360	3.681	9	9
Vietnam	-	-	393	953	2	143
Thailand	-	-	947	709	2	-
Ecuador	-	-	150	154	0	3
Tanzania	-	-	-	13	0	-

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

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2012

Tab. 4.17 Overview of the adjusted rates of conversion

	COD		POK		RED		AP		SAL		Freshwater fish		PANGASIUS		SURIMI	
	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	2,90	3,48		2,73		3,37				2,50		2,22		2,22		
of it from China									2,27							
Vietnam											3,33		3,33			
Fillet, frozen	2,20	2,95		2,43		3,00		2,95		2,50		2,22		2,22		
of it from China			2,22		2,78		2,38		2,27		2,02					
Russia							3,70									
USA							3,70									
Vietnam											3,33		3,33			
Meat, fresh												1,92				
Meat, frozen	2,40	2,64		2,12		2,34		2,64				2,22				
of it from China											2,02					
Vietnam											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						
Surimi															4,55	7,50
Surimi, prepared															4,55	6,33

Source: Own estimations of AIPCE experts.-
Published by: AIPCE 2012

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

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
Whole, fresh	**494.938**	**544.087**	**555.689**	**602.647**	**100**	**8**
of it from Canada	195	201	67	124	0	85
Chile	-	-	-	7	0	-
Faroe Isles	23.575	24.850	22.967	38.421	6	67
Iceland	1	3	13	-	-	-
Norway	471.077	519.142	532.597	564.110	94	6
USA	74	288	126	95	0	-25
Whole, frozen	**17.513**	**15.131**	**14.732**	**13.987**	**100**	**-5**
of it from Canada	1.498	1.495	634	707	5	11
Chile	2.006	2.194	430	334	2	-22
China	1.000	767	1.622	1.330	10	-18
Faroe Isles	939	693	144	24	0	-83
Iceland	-	-	-	-	-	-
Norway	3.413	2.377	3.634	3.203	23	-12
Thailand	101	-	132	24	0	-82
USA	6.831	6.657	7.644	8.376	60	10
Fillet, fresh	**78.712**	**91.470**	**104.699**	**107.922**	**100**	**3**
of it from Canada	240	257	100	171	0	71
Chile	1.189	267	55	310	0	463
China	381	426	604	333	0	-45
Faroe Isles	-	71	1	-	-	-
Iceland	4	2	2	-	-	-
Norway	76.286	90.682	104.835	107.342	99	2
USA	186	90	51	51	0	0
Fillet, frozen	**197.782**	**191.624**	**176.295**	**164.480**	**100**	**-7**
of it from Canada	589	666	619	597	0	-4
Chile	86.005	53.600	17.176	23.919	15	39
China	64.286	74.303	92.826	83.024	50	-11
Faroe Isles	10.651	14.401	16.624	16.242	10	-2
Iceland	164	215	168	85	0	-49
Norway	22.904	40.244	41.585	35.410	22	-15
Thailand	3.909	614	641	318	0	-50
USA	7.459	5.135	7.602	7.840	5	3
Salmon prepared	**73.610**	**46.833**	**56.286**	**47.371**	**100**	**-16**
of it from Canada	-	-	2	-	-	-
Chile	3.153	1.551	354	161	0	-55
China	1.462	895	3.293	3.778	8	15
Färöer	16	-	-	-	-	-
Iceland	27	21	16	14	0	-11
Norway	4.081	2.084	1.617	1.309	3	-19
Thailand	5.274	3.133	3.522	1.902	4	-46
USA	42.970	30.138	34.092	32.646	69	-4
Supply (Catches + Import)	863.161	889.874	908.318	936.976	100	3
of it catches of quoted species	606	730	616	569	0	92
Import from third countries	862.555	889.144	907.702	936.407	100	3
of it from Norway c)	577.760	654.528	684.267	711.374	76	4
China c)	67.199	76.542	98.392	88.608	9	-10
Faroe Isles	35.319	40.014	39.748	54.687	6	38
USA	57.520	42.307	49.514	49.008	5	-1
Chile c)	92.352	57.611	18.015	24.731	3	37
Canada	18.041	11.301	15.031	9.945	1	-34
Thailand	9.285	3.747	4.300	2.249	0	-48
Iceland c)	196	249	205	99	0	-52

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.-
Published by: AIPCE 2012

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

Origin a)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
Live b)	**1.483**	**602**	**1.380**	-	**100**	-100
Whole, fresh	**8.171**	**7.777**	**6.415**	**7.057**	**100**	10
of it White Tuna (Th. alalunga)	**1.296**	**1.380**	**928**	**809**	100	-13
of it from Ecuador	222	-	-	-	-	-
of it Yellow Tuna (Th. albacares)	**6.060**	**5.708**	**4.764**	**5.623**	**100**	18
of it from Maledives	-	1.656	1.256	4.025	72	220
of it Bonito	**45**	**144**	**42**	**162**	100	289
of it Big-eye Tuna (Th. obesus)	**64**	**22**	**64**	**51**	100	-21
of it Red Tuna b)	**566**	**418**	**553**	**190**	100	-66
of it other Tuna species	**140**	**105**	**64**	**223**	**100**	245
Whole, frozen	**220.727**	**224.484**	**252.962**	**265.686**	**100**	5
of it White Tuna (Th. alalunga)	**30.353**	**36.144**	**2.401**	**7.846**	**100**	227
of it from South Africa	9.047	8.626	11.149	6.773	86	-39
USA	7.085	10.372	7.424	5.814	74	-22
Thailand	3.170	1.335	-	1.362	18	-
of it Yellow Tuna (Th. albacares)	**135.113**	**132.879**	**160.140**	**161.551**	**100**	1
of it from Thailand	23.572	40.410	2.115	4.554	3	115
Phillipines	15.351	10.570	29.986	22.482	14	-25
Panama	13.837	11.624	14.878	11.278	7	-24
Mexico	11.458	5.638	26.785	36.933	23	38
Kap Verde	8.733	5.436	8.535	7.184	4	-16
of it Bonito	**42.200**	**45.572**	**53.753**	**52.058**	**100**	-3
of it from Panama	9.254	8.734	9.621	13.638	26	42
Guatemala	9.246	5.507	5.601	3.857	7	-31
Kap Verde	4.116	4.479	6.539	6.984	13	7
of it Big-eye Tuna (Th. obesus)	**10.525**	**8.903**	**10.103**	**11.859**	**100**	17
of it from Seychelles	697	3.145	1.227	2.289	19	87
of it Red Tuna b)	**63**	**78**	**48**	**2**	**100**	-97
of it other Tuna species	**2.474**	**908**	**944**	**1.417**	**100**	50
of it from Panama	1.345	78	271	322	23	19
Fillets, fresh d)	**76.125**	**73.673**	**71.840**	**70.531**	**100**	-2
of it from Sri Lanka	18.427	18.885	17.602	10.765	15	-39
Fillets, frozen	**23.346**	**23.355**	**28.495**	**28.939**	**100**	2
of it from Sri Lanka	5.521	5.658	3.784	1.628	6	-57
Vietnam	4.879	6.303	8.901	11.046	38	24
Tuna, loins	**246.654**	**312.816**	**292.244**	**304.998**	**100**	4
of it from Ecuador	100.309	122.525	103.818	101.721	33	-2
Thailand	20.363	47.203	33.974	45.806	15	35
Mauritius	30.146	32.748	35.084	32.705	11	-7
Tuna, prepared	**1.187.088**	**1.057.435**	**1.037.066**	**1.083.592**	**100**	4
of it from Ecuador	261.821	178.638	173.376	199.158	18	15
Thailand	179.452	175.660	187.011	208.417	19	11
Phillipines	151.960	150.782	126.683	98.506	9	-22
Mauritius	106.358	99.119	123.514	122.393	11	-1
Supply (Catches + Import)	**1.723.665**	**1.668.752**	**1.649.437**	**1.731.867**	**100**	**5**
of it catches of EU quoted tuna	36.195	42.282	30.876	41.596	2	35
Import from third countries	1.687.470	1.626.470	1.618.561	1.690.271	98	4
of it from Ecuador c)	372.711	304.944	285.987	312.107	18	9
Thailand c)	227.276	265.831	223.775	260.603	15	16
Mauritius c)	138.961	132.873	159.745	162.894	10	2
Seychelles c)	132.365	138.284	124.464	127.307	8	2
Phillipines c)	167.868	162.011	158.349	123.061	7	-22
Ghana c)	100.665	92.833	90.479	82.547	5	-9
Ivory Coast c)	110.507	92.526	88.500	76.266	5	-14
Columbia c)	67.023	43.995	39.816	46.386	3	17
Vietnam c)	36.273	33.340	32.711	39.951	2	22
Guatemala c)	25.630	28.354	36.803	29.342	2	-20

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

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2012

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

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
Whole, fresh	**82.875**	**72.582**	**59.549**	**24.980**	**100**	-58
of it from Faroe Isles	14.377	13.290	20.702	3.349	13	-84
Norway	68.496	59.292	38.847	21.631	87	-44
Whole, frozen	**46.348**	**53.245**	**60.235**	**55.794**	**100**	-7
of it from Canada	1.491	1.107	449	905	2	101
China	86	-	-	-	-	-
Faroe Isles	764	1.048	5.822	9.751	17	67
Iceland	2.328	2.505	3.914	1.918	3	-51
Norway	40.442	48.190	49.050	40.130	72	-18
USA	934	394	902	2.457	4	172
Herring flaps, fresh	**44**	**3.088**	**3.568**	**4.373**	**100**	23
of it from Norway	44	3.088	3.567	4.373	100	23
Herring fillets, frozen	**102.739**	**100.795**	**106.540**	**109.701**	**100**	3
of it from Canada	186	45	-	-	-	-
Faroe Isles	-	90	1.598	1.141	1	-29
Iceland	30.392	21.865	29.390	30.218	28	3
Norway	72.162	78.766	75.539	78.295	71	4
Herring flaps, frozen	**131.798**	**173.744**	**185.596**	**164.269**	**100**	-11
of it from Canada	15.985	13.003	2.902	7.490	5	158
Faroe Isles	1.781	11.070	13.907	9.959	6	-28
Iceland	42.004	47.835	47.902	36.961	23	-23
Norway	72.028	101.834	120.822	109.860	67	-9
Herring, smoked	**1.896**	**1.809**	**1.501**	**1.413**	**100**	-6
of it from Canada	1.734	1.615	1.309	1.265	90	-3
China	41	96	118	10	1	-91
Norway	103	89	73	93	7	28
Herring, salted	**31**	**28**	**23**	**3**	**100**	-89
of it from Canada	26	26	23	-	-	-100
Norway	4	2	-	2	89	-
Herring presentations, others	**33.904**	**34.633**	**40.564**	**39.743**	**100**	-2
of it from Iceland	4.881	1.966	1.583	600	2	-62
Norway	28.856	32.557	39.091	38.929	98	0
Russia	83	39	-	3	0	-
Supply (Catches + Import)	**958.679**	**1.022.718**	**907.146**	**936.574**	**100**	**3**
of it catches of EU quoted herring	559.044	582.794	449.570	536.298	57	19
Import from third countries	399.635	439.924	457.576	400.276	43	-13
of it from Norway	284.067	325.805	326.979	294.953	74	-10
Iceland	79.605	74.172	82.788	69.697	17	-16
Faroe Isles	16.922	25.498	42.029	24.201	6	-42
Canada	19.422	15.796	4.717	9.660	2	105
USA	934	394	902	2.457	1	172
China	127	96	118	10	0	-91
Russia	83	39	-	3	0	-

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.-
Published by: AIPCE 2012

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

Origin b)	Quantity (tonnes live weight)				Share (%)	Change (%)
	2008	2009	2010	2011	2011	11/10
Whole, fresh	**7.703**	**7.104**	**11.605**	**3.766**	**100**	**-68**
of it from Faroer Isles	1.213	514	866	1.111	29	28
Norway	6.299	6.555	10.723	2.652	70	-75
Whole, frozen	**46.852**	**42.931**	**41.945**	**66.296**	**100**	**58**
of it from Argentina	367	515	2	6	0	300
Canada	11.719	2.692	4.643	2.865	4	-38
China	360	776	886	2.429	4	174
Ecuador	57	379	55	24	0	-57
Faroe Isles	0	1.100	10.958	34.136	51	212
Iceland	330	164	2.696	9.981	15	270
Morocco	4.857	1.500	930	2.575	4	177
Norway	13.387	20.633	19.180	12.514	19	-35
Peru	7.873	6.889	118	466	1	295
Thailand	314	193	20	1	0	-97
USA	5.804	4.103	1.211	25	0	-98
Fillets, frozen c)	**5.280**	**5.174**	**6.935**	**6.460**	**100**	**-7**
of it from China	1.399	1.217	1.461	1.971	31	35
India	25	27	34	8	0	-77
Norway	3.612	3.826	5.196	2.986	46	-43
Vietnam	108	39	41	35	1	-16
Smoked	**29**	**45**	**123**	**5**	**100**	**-96**
of it from China	20	44	106	-	-	-
Norway	9	1	5	3	50	-52
Prepared d)	**27.969**	**49.427**	**48.125**	**53.456**	**100**	**11**
of it from Albania	54	3.080	3.168	3.407	6	8
Chile	793	1.022	161	-	-	-
China	106	1.394	2.698	3.575	7	32
Kap Verde	21	1.742	2.261	5.466	10	142
Ecuador	797	628	611	631	1	3
Morocco	16.066	30.915	30.018	30.822	58	3
Norway	116	9	9	8	0	-17
Peru	7.051	4.046	2.184	3.347	6	53
Thailand	2.595	2.375	2.205	1.443	3	-35
Supply (Catches + Import)	**408.779**	**521.846**	**513.012**	**484.504**	**100**	**-6**
of it catches of EU quoted mackerel	320.946	417.164	404.280	354.521	73	-12
Import from third countries	87.833	104.682	108.732	129.983	27	20
of it from Faroe Islands	1.214	1.614	11.869	35.275	27	197
Morocco	20.932	32.436	31.004	33.520	26	8
Norway	17.115	24.468	24.385	15.507	12	-36
China	1.885	3.431	5.151	7.974	6	55
Kap Verde	21	1.742	2.261	5.466	4	142
Peru	14.924	10.935	2.302	3.851	3	67
Canada	11.891	2.692	4.643	2.865	2	-38
Thailand	2.908	2.567	2.237	1.444	1	-35
Ecuador	864	1.018	665	860	1	29
Taiwan	1.480	1.227	312	681	1	118
USA	5.804	4.103	1.211	25	0	-98
Chile	837	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 (%)
	2008	2009	2010	2011	2011	11/10
Shrimp (Pandalidae), frozen	**83.190**	**72.301**	**69.820**	**59.387**	**100**	-15
of it from Greenland	60.778	56.088	55.213	51.469	87	-7
Shrimp (Crangon), frozen	**356**	**105**	**222**	**39**	**100**	-82
Rose Shrimp (Parapenaeus), frozen	**9.381**	**7.456**	**8.267**	**11.611**	**100**	40
of it from Morocco	5.531	4.484	3.440	4.584	39	33
Senegal	1.500	593	1.466	3.367	29	130
Tunisia	587	1.257	1.930	2.324	20	20
Shrimp (Penaeus spp.), frozen	**333.793**	**350.298**	**361.127**	**339.655**	**100**	-6
of it from Ecuador	80.900	75.367	85.858	94.923	28	11
India	31.788	39.781	37.509	42.176	12	12
Thailand	23.429	29.464	42.959	36.090	38	-16
Bangladesh	21.383	28.562	30.972	32.212	76	4
Shrimp, other species, frozen	**123.913**	**125.900**	**122.469**	**144.717**	**100**	18
of it from Argentina	17.048	21.680	30.522	52.992	37	74
China	32.234	36.332	33.086	31.528	22	-5
Shrimp (Pandalidae), not frozen	**2.065**	**1.555**	**890**	**735**	**100**	-17
of it from Morocco	105	97	101	101	14	0
Shrimp (Crangon), fresh or cooked	**3.205**	**161**	**235**	**32**	**100**	-86
of it from Morocco	3.192	130	216	31	95	-86
Shrimp (Crangon) other than [1)]	**355**	**319**	**418**	**381**	**100**	-9
of it from Vietnam	23	6	20	92	24	362
Shrimp, other species, not frozen	**748**	**1.242**	**1.720**	**2.004**	**100**	16
of it from Greenland	-	628	854	1.100	55	29
Shrimp, prep./pres. in airtight cont.	**108.897**	**108.250**	**102.318**	**97.118**	**100**	-5
of it from Greenland	37.785	29.560	28.524	28.508	29	0
Shrimp, prep./pres., less than 2 kg [2)]	**71.546**	**73.721**	**83.625**	**74.630**	**100**	-11
of it from Thailand	21.286	28.114	36.402	30.564	41	-16
Shrimp, prep./pres., more than 2 kg [2)]	**170.428**	**194.444**	**205.576**	**216.606**	**100**	5
of it from Canada	48.144	48.899	54.299	53.512	25	-1
Supply (Catches + Import)	**929.730**	**958.602**	**979.380**	**967.511**	**100**	**-1**
of it catches of EU quoted shrimp [3)]	21.853	22.849	22.694	20.595	2	-9
import from third countries	907.877	935.753	956.686	946.916	98	-1
of it from Greenland b)	132.808	124.311	123.122	116.314	12	-6
Thailand b)	71.316	98.523	121.704	112.902	12	-7
Ecuador b)	90.702	82.725	92.865	108.064	11	16
China b)	86.582	85.140	87.721	80.230	8	-9
Argentina b)	45.493	55.504	65.380	72.580	8	11
India b)	77.553	82.128	75.137	72.413	8	-4
Vietnam b)	48.017	56.504	64.352	71.771	8	12
Canada b)	72.295	76.981	71.699	67.119	7	-6
Bangladesh b)	38.173	43.397	45.069	47.281	5	5
Morocco b)	24.583	31.518	33.790	33.787	4	0
Indonesia b)	49.389	47.340	41.879	33.342	4	-20
Iceland b)	35.363	30.098	30.341	25.119	3	-17
Honduras b)	13.365	16.448	11.962	12.223	1	2
Nicaragua b)	8.260	10.159	9.752	10.936	1	12
Venezuela b)	10.319	10.019	8.313	9.949	1	20
Madagascar b)	12.018	10.293	9.764	9.318	1	-5
USA b)	2.811	1.865	3.116	7.191	1	131
Mozambique b)	7.554	6.561	7.665	6.543	1	-15
Senegal b)	4.128	3.384	3.840	5.876	1	53
Nigeria b)	4.472	5.100	4.771	4.713	0	-1

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) In immediate packings.- 3) 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 (%)
	2008	2009	2010	2011	2011	11/10
SQUID total	**203.273**	**185.845**	**221.222**	**202.722**	**41**	**-8**
of it Loligo, frozen	169.747	149.078	182.431	162.919	100	-11
of it L. patagonico	31.432	21.257	40.304	24.127	100	-40
of it from Falkland Isles	28.815	18.140	37.628	20.891	87	-44
of it L. vulgaris	12.989	12.030	9.441	9.805	100	4
of it from Morocco	2.419	3.073	3.066	4.447	45	45
of it L. pealei	1.323	963	726	1.332	100	84
of it from USA	1.305	951	726	1.291	97	78
of it other loligo	124.003	114.827	131.961	127.656	100	-3
of it from India	28.800	27.446	42.840	38.175	30	-11
Thailand	30.543	26.165	24.061	24.415	19	1
of it other squid (Pota and Poton) c)	24.042	24.877	26.304	34.422	100	31
of it from China	4.297	5.924	11.263	14.770	43	31
Squid, fresh	2.416	2.343	1.612	1.087	100	-33
Squid, prepared	7.068	9.547	10.876	4.293	100	-61
ILLEX frozen total	**76.403**	**51.277**	**57.509**	**38.618**	**8**	**-33**
of it from Argentina	65.476	33.110	27.571	18.769	49	-32
China	3.570	11.384	23.832	12.430	32	-48
CUTTLE FISH total	**65.443**	**71.699**	**67.885**	**60.963**	**12**	**-10**
of it sepiola, frozen	62.975	69.508	66.767	59.938	100	-10
of it S. rondeleti	138	145	91	197	0	115
of it excluding S. rondeleti	8.661	10.926	8.859	6.598	11	-26
of it from Morocco	3.107	3.678	5.301	3.704	56	-30
of it other species	54.176	58.438	57.817	53.143	100	-8
of it from India	19.761	24.421	20.749	16.899	32	-19
Morocco	9.399	12.126	9.888	11.653	22	18
Cuttle fish, fresh	1.017	760	653	770	100	18
Cuttle fish, prepared	1.451	1.432	465	255	100	-45
OCTOPUS total	**94.626**	**104.530**	**84.175**	**90.790**	**18**	**8**
of it octopus frozen	93.348	103.662	83.700	90.338	100	8
of it from Morocco	39.068	39.191	28.629	20.544	23	-28
Mexico	3.753	6.623	12.427	13.627	15	10
Senegal	5.028	7.466	4.429	8.437	9	90
of it octopus, fresh	929	777	344	269	100	-22
of it octopus, prepared	350	92	131	183	100	40
Other frozen Cephal. , frozen d)	**82.814**	**65.962**	**79.855**	**103.614**	**21**	**30**
of it from Peru	51.098	32.029	36.590	44.623	43	22
India	10.370	13.730	15.971	19.106	18	20
Supply (Catches + Import)	**522.559**	**479.313**	**510.646**	**496.706**	**100**	**-3**
of it catches of EU quoted cephalopods	-	-	-	-	-	-
import from third countries	522.559	479.313	510.646	496.706	100	-3
of it from India b)	66.645	74.054	87.126	83.576	17	-4
China b)	29.904	45.684	73.029	63.442	13	-13
Peru b)	69.226	51.543	57.206	59.652	12	4
Morocco b)	59.187	63.818	50.234	43.881	9	-13
Falkland Isles b)	45.963	34.344	51.438	36.743	7	-29
Thailand b)	41.476	39.414	33.775	32.697	7	-3
Vietnam b)	29.224	23.605	25.692	26.514	5	3
Argentina b)	66.378	33.369	27.983	19.026	4	-32
Chile b)	2.959	1.526	5.576	16.491	3	196
Mexico b)	5.907	10.119	14.814	14.041	3	-5
Indonesia b)	8.890	7.245	10.107	13.098	3	30
Tunisia b)	6.972	5.411	8.998	12.968	3	44
USA b)	7.694	9.053	7.613	12.875	3	69
Senegal b)	9.318	11.313	8.169	12.651	3	55
Mauretania b)	11.592	24.162	10.654	10.838	2	2

Notes: a) Selected countries, which are most important for EU supply with cephalopods.- b) Incl. quantities not listed above.-
c) Pota= i.e. Todadorus pacificus, Poton=i.e. Dosidicus gigas.- d) includ. Pota and Poton.-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2012

Tab. 6.1 EU-Quota by species

Species	Code-name	EU (25) 2007	EU (25) 2008	EU (27) 2009	EU (27) 2010	EU (27) 2011 a)	Change 11/10 %	Quota '11 by species %
		tonnes						
Herring	HER	781.371	784.620	617.041	600.720	639.533	6,5	19,8
Sprat	SPR	655.764	705.066	617.725	584.427	513.762	-12,1	15,9
Anchovy	ANE	8.000	8.000	8.000	30.600	38.142	24,6	1,2
Atl. Salmon	SAL	2.221	1.899	1.626	1.548	1.328	-14,2	0,0
Cod	COD	130.461	127.245	138.779	158.351	162.310	2,5	5,0
Haddock	HAD	78.152	69.179	60.501	52.239	53.331	2,1	1,6
Saithe	POK	84.708	90.310	83.429	71.250	61.351	-13,9	1,9
Pollack	POL	17.980	17.980	17.980	16.211	15.887	-2,0	0,5
Norway pout	NOP	5.000	115.000	117.750	76.000	4.500	-94,1	0,1
Blue whiting	WHB	409.613	420.784	146.593	130.014	22.912	-82,4	0,7
Greater forkbeard	GFB	2.143	2.551	2.380	2.380	2.560	7,6	0,1
Whiting	WHG	50.861	40.496	34.836	30.275	35.608	17,6	1,1
Hake b)	HKE	67.065	71.646	64.604	67.934	75.386	11,0	2,3
Jack&horse macke.	JAX	250.765	286.125	264.219	263.717	274.609	4,1	8,5
Mackerel	MAC	139.687	374.063	492.851	500.551	381.467	-23,8	11,8
Europ. Plaice	PLE	73.545	72.202	75.239	81.912	90.016	9,9	2,8
Common sole / Sole	SOL	34.020	31.834	28.406	27.509	29.575	7,5	0,9
Megrims	LEZ	26.618	26.418	26.251	26.548	26.441	-0,4	0,8
Anglerfish nei	ANF	59.723	58.166	56.222	61.348	63.193	3,0	2,0
Penaeus shrimps	PEN	4.108	4.108	4.108	4.108	-	-	-
North deep prawn	PRA	24.661	26.814	25.187	23.362	21.924	-6,2	0,7
Norway lobster	NEP	90.214	90.229	79.348	73.884	77.042	4,3	2,4
Atl. Redfish	RED	34.620	32.205	33.414	36.348	29.444	-19,0	0,9
Greenland halibut	GHL	16.146	17.848	17.706	17.601	17.355	-1,4	0,5
Atl. Halibut	HAL	1.200	1.200	1.150	1.075	1.150	7,0	0,0
other species	OTH	8.210	6.110	6.110	6.110	5.350	-12,4	0,2
Sandeels	SAN	178.238	360.000	346.920	346.920	354.380	2,2	11,0
Blue ling & ling	B/L	3.065	3.065	3.065	2.700	-	-	-
Blue ling	BLI	2.628	2.315	2.088	1.799	2.642	46,9	0,1
Ling	LIN	16.338	14.661	14.656	11.266	12.268	8,9	0,4
Flat fish	FLX	300	300	300	300	-	-	-
Capelin	CAP	-	-	-	-	56.364	-	1,7
Catfish	CAT	-	-	-	-	-	-	-
Witch flunder	WIT	-	-	-	-	-	-	-
American plaice	PLA	-	-	-	-	-	-	-
Yellow tail flounder	YEL	-	-	-	-	-	-	-
Roundnose grenad.	RNG	12.000	12.221	9.974	9.388	8.313	-11,5	0,3
Industry fish	I/F	800	800	800	800	800	0,0	0,0
Skates (NAFO)	SKA	-	-	-	-	-	-	-
Turbot / Brill	T/B	5.263	5.263	5.263	4.737	4.642	-2,0	0,1
Skates (ICES)	SRX	10.690	10.143	33.427	28.744	27.756	-3,4	0,9
Dab / Flunder	D/F	17.100	18.810	18.810	18.810	18.434	-2,0	0,6
Lemon Sole/Witch Flunder	L/W	6.175	6.793	6.793	6.521	6.391	-2,0	0,2
Northern blue fin tuna	BFT	16.780	16.211	11.907	7.087	5.748	-18,9	0,2
Albacore	ALB	44.983	38.965	40.108	29.832	29.832	0,0	0,9
Bigeye tuna	BET	31.500	31.350	31.200	31.200	29.867	-4,3	0,9
Swordfish	SWO	13.598	12.767	13.949	15.274	14.315	-6,3	0,4
Picked dogfish	DGS	3.619	2.585	1.372	142	5	-96,5	0,0
Black scabbardfish	BSF	7.351	12.448	10.635	10.192	10.432	2,4	0,3
Greater argentine	ARU	6.758	6.758	6.758	6.489	5.970	-8,0	0,2
Tusk (=Cusk)	USK	809	887	888	705	732	3,9	0,0
Orange roughy	ORY	314	214	97	-	1	-	0,0
Blackspot(=red)seabream	SBR	2.515	2.629	2.307	2.131	2.318	8,8	0,1
Deep Sea Sharks	DWS	2.637	1.927	859	86	0	-99,7	0,0
unserted species	VFF	-	-	-	-	-	-	-
Total:		3.442.317	4.043.210	3.583.631	3.481.145	3.235.385	-7,1	100,0

Tab. 6.1 EU-Quota by species

Species	Code-name	EU (25) 2007	EU (25) 2008	EU (27) 2009	EU (27) 2010	EU (27) 2011 a)	Change 11/10 %	Quota '11 by species %
		tonnes						
of which: (COD, POK, POL, HAD, WHB, HKE, RED)		822.599	829.349	545.300	532.347	420.621	-21,0	13,0

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

Source: EU, TAC regulations.-
Published by: AIPCE 2012

Tab. 6.2 EU-Catches by quoted species

Species	Code-name	EU (25) 2007	EU (25) 2008	EU (27) 2009	EU (27) 2010	EU (27) 2011 a)	Change 11/10 %	Quota'11 by spec. % b)
		tonnes						
Herring	HER	612.452	559.044	582.794	449.570	536.298	19,3	83,9
Sprat	SPR	458.193	430.007	512.651	474.637	391.850	-17,4	76,3
Anchovy	ANE	5.571	3.298	2.725	12.777	23.255	82,0	61,0
Atl. Salmon	SAL	763	606	730	616	569	-7,6	42,9
Cod	COD	133.126	117.396	126.234	138.449	138.629	0,1	85,4
Haddock	HAD	48.439	47.133	50.117	46.711	46.291	-0,9	86,8
Saithe	POK	57.629	64.904	53.247	52.362	53.549	2,3	87,3
Pollack	POL	5.914	5.581	4.877	5.506	6.113	11,0	38,5
Norway pout	NOP	87	30.963	18.633	66.924	3.733	-94,4	82,9
Blue whiting	WHB	315.708	227.444	84.145	82.278	14.528	-82,3	63,4
Greater forkbeard	GFB	1.621	1.882	1.607	1.621	1.630	0,6	63,7
Whiting	WHG	31.483	25.839	26.792	28.604	29.231	2,2	82,1
Hake c)	HKE	38.080	46.041	48.900	55.330	61.106	10,4	81,1
Jack&horse macke.	JAX	183.455	191.936	200.603	189.061	217.713	15,2	79,3
Mackerel	MAC	170.054	320.946	417.164	404.280	354.521	-12,3	92,9
Europ. Plaice	PLE	64.434	62.098	64.655	75.136	77.214	2,8	85,8
Common sole / Sole	SOL	25.522	24.885	24.214	24.032	21.168	-11,9	71,6
Megrims	LEZ	14.959	14.997	16.537	17.275	15.438	-10,6	58,4
Anglerfish nei	ANF	46.550	43.986	41.229	43.893	41.988	-4,3	66,4
Penaeus shrimps	PEN	2.362	1.496	1.019	944	681	-27,9	-
North deep prawn	PRA	11.884	11.612	14.332	10.747	27.990	160,4	127,7
Norway lobster	NEP	67.468	65.554	62.242	58.107	37.555	-35,4	48,7
Atl. Redfish	RED	19.832	17.071	20.199	25.186	19.856	-21,2	67,4
Greenland halibut	GHL	15.116	15.191	14.927	15.491	9.801	-36,7	56,5
Atl. Halibut	HAL	65	53	96	-	124	-	10,8
other species	OTH	4.928	4.915	4.937	5.226	4.649	-11,0	86,9
Sandeels	SAN	179.344	277.313	326.666	331.372	329.715	-0,5	93,0
Blue ling & ling	B/L	2.643	1.723	1.703	1.829	-	-	-
Blue ling	BLI	2.396	1.866	2.170	1.805	2.054	13,8	77,7
Ling	LIN	8.148	8.406	8.560	9.608	9.492	-1,2	77,4
Flat fish	FLX	89	89	84	275	-	-	-
Capelin	CAP	-	-	-	-	11.324	-	-
Catfish	CAT	71	170	197	-	198	-	-
Witch flunder	WIT	280	386	420	405	542	33,8	-
American plaice	PLA	949	984	762	817	905	10,7	-
Yellow tail flounder	YEL	666	677	355	1.049	1.230	17,2	-
Roundnose grenad.	RNG	7.812	5.337	4.543	5.885	5.959	1,3	71,7
Industry fish	I/F	422	757	621	725	669	-7,7	83,6
Skates (NAFO)	SKA	152	136	149	-	155	-	-
Turbot / Brill	T/B	4.576	3.804	4.001	3.918	3.714	-5,2	80,0
Skates (ICES)	SRX	6.700	8.063	19.112	20.889	19.638	-6,0	70,7
Dab / Flunder	D/F	12.890	10.848	9.226	10.224	9.248	-9,5	50,2
Lemon Sole/Witch Flunder	L/W	3.716	3.550	2.595	2.515	3.100	23,2	48,5
Northern blue fin tuna	BFT	22.513	11.153	11.043	6.047	5.673	-6,2	98,7
Albacore	ALB	17.873	18.492	18.957	15.122	16.041	6,1	53,8
Bigeye tuna	BET	8.238	6.550	12.282	9.707	19.882	104,8	66,6
Swordfish	SWO	11.996	10.146	11.419	11.168	10.544	-5,6	73,7
Picked dogfish	DGS	1.956	790	1.244	263	15	-94,2	304,0
Black scabbardfish	BSF	5.771	9.716	8.646	7.716	8.030	4,1	77,0
Greater argentine	ARU	4.043	3.026	1.827	2.998	3.062	2,1	51,3
Tusk (=Cusk)	USK	552	620	479	435	464	6,6	63,3
Orange roughy	ORY	372	104	37	-	1	-	-
Blackspot(=red)seabream	SBR	1.619	1.553	1.412	1.146	888	-22,5	38,3
Deep Sea Sharks	DWS	1.745	1.342	793	165	56	-65,9	18733,3
unserted species	VFF	44	132	94	-	143	-	-
Total:		2.643.271	2.722.611	2.845.003	2.730.846	2.598.219	-4,9	80,3

Tab. 6.2 EU-Catches by quoted species

Species	Code-name	EU (25) 2007	EU (25) 2008	EU (27) 2009	EU (27) 2010	EU (27) 2011 a)	Change 11/10 %	Quota'11 by spec. % b)
		tonnes						
of which: (COD, POK, POL, HAD, WHB, HKE, RED)		618.728	525.570	387.719	405.822	340.071	-16,2	80,8

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

Source: EU catch report
Published by: AIPCE 2012

Tab. 6.3 Overview of selected fish quotas in the world

Species	2007	2008	2009	2010	2011	2012
	1.000 tonnes					
Atlantic cod						
Barents Sea / Norway / Russia	424	430	525	607	703	751
Norway Coast	21	21	21	21	21	21
Iceland	193	130	160	150	160	177
EU (27)	130	127	139	158	159	134 a)
Pacific cod						
USA	222	220	218	228	293	326
Asia	110	132	135	135	125 b)	125 b)
Haddock						
Barents Sea	150	155	194	243	303	318
Iceland	105	100	93	63	50	45
EU (27)	78	69	61	52	51	61
Saithe						
Barents Sea	222	247	225	204	173	164
Iceland	80	75	65	50	50	52
Faroes	61	57	58	44	29 b)	<40 c)
EU (27)	85	90	83	71	60	50 a)
Alaska pollock						
Russia	1.300	1.420	1.441	1.652	1.620 b)	1.620 b)
USA	1.476	1.071	884	915	1.367	1.336
European hake						
EU (27)	67	72	65	64	66	67
Pacific hake						
USA/Canada	328	365	184	262	393	255

Note: a) Adjusted for Barents Sea share.- b) Estimate.- c) Advised limit.-
Source: EU, ICES, NMFS, NCMC, PFMC.-
Published by: AIPCE 2012

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 2009

Month	1	2	3	4	5	6	7	8	9	10	11	12
Alaska-Pollock												
Fillets a), frozen: Total import	2,47	2,65	2,78	2,69	2,68	2,54	2,44	2,43	2,46	2,21	2,17	2,11
from it: Germany	2,60	2,76	2,86	2,75	2,81	2,70	2,54	2,56	2,64	2,34	2,39	2,30
France	2,53	2,71	2,91	2,77	2,73	2,43	2,36	2,34	2,56	2,44	2,20	2,32
UK	2,33	2,73	2,81	2,43	2,37	2,28	2,15	2,18	2,17	2,11	2,03	1,94
NL	2,75	3,02	3,23	3,09	2,92	2,89	2,72	2,78	2,69	2,65	2,57	2,48
Spain	1,91	2,41	2,44	2,35	2,20	1,89	1,87	1,69	1,87	1,84	1,75	1,84
Denmark	2,95	2,98	2,71	2,86	3,08	2,61	2,28	2,68	2,62	2,52	2,33	2,38
Belgium	2,23	2,26	2,76	2,49	2,58	2,21	2,00	2,39	2,26	2,01	2,01	2,10
Sweden	2,54	2,71	2,80	2,93	2,85	2,73	2,52	2,54	2,66	2,37	2,27	2,16
Poland	1,74	1,94	2,02	1,95	1,92	1,85	2,06	1,69	1,63	1,34	1,36	1,36
Meat b), frozen: Total import	1,73	1,85	1,85	1,72	1,76	1,71	1,60	1,61	1,62	1,59	1,48	1,55
from it: Germany	1,73	1,88	1,80	1,55	1,71	1,64	1,52	1,52	1,53	1,43	1,49	1,49
France	1,68	1,73	1,98	1,77	1,81	1,75	1,47	1,48	1,54	1,45	1,34	1,28
UK	-	-	2,18	2,38	1,77	1,71	1,57	1,94	1,53	1,85	1,84	1,74
NL	-	2,06	1,30	1,68	-	1,60	-	2,16	2,69	2,01	1,83	2,16
Spain	-	2,01	-	-	1,79	1,94	1,84	-	-	1,56	-	-
Denmark	-	-	-	-	-	-	-	-	-	-	-	-
Poland	1,55	1,87	-	-	-	1,95	-	1,43	1,72	-	-	-
Hake												
Fillets c), frozen: Total import	3,02	3,00	2,98	2,95	2,88	2,73	2,79	2,71	2,79	2,82	2,58	2,61
from it: Germany	2,68	2,84	2,98	2,78	2,53	2,75	2,79	2,48	2,38	2,25	2,27	2,31
France	3,36	3,44	3,47	3,10	2,99	3,31	2,84	3,35	3,30	2,96	2,90	2,83
UK	2,78	3,22	3,05	3,10	2,91	3,23	3,12	2,95	3,17	3,01	3,72	2,61
NL	3,26	3,29	3,16	3,02	3,15	3,15	3,18	3,16	3,27	3,17	3,12	2,97
Spain	2,65	2,74	2,75	2,57	2,68	2,36	2,57	2,44	2,78	2,94	2,65	2,70
Poland	1,97	2,87	2,38	2,74	2,02	1,76	1,98	1,89	1,94	1,89	1,75	2,03
Italy	4,14	3,95	3,60	3,79	3,51	3,29	3,36	3,35	3,28	3,40	3,17	2,68
Meat d), frozen: Total import	2,66	1,96	2,26	2,09	1,85	1,88	1,68	1,81	1,81	1,67	1,61	1,74
from it: Germany	1,42	1,50	1,59	1,40	1,48	1,34	1,46	1,35	1,40	1,00	1,25	1,18
France	-	-	-	0,71	-	1,21	1,37	1,32	2,53	1,25	1,19	-
UK	-	1,58	-	0,90	-	1,21	1,23	1,17	-	1,13	-	-
NL	-	-	-	-	-	-	-	-	-	-	-	-
Spain	3,17	2,38	2,56	2,38	2,07	2,22	1,94	2,05	2,04	1,99	2,28	1,85
Poland	-	-	-	1,56	-	-	-	-	-	-	1,12	1,23
Italy	3,46	-	3,46	2,40	1,92	-	1,25	1,13	1,41	1,20	1,43	3,76

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 2012

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 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: 03042965 (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 2012

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 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	2,26	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 2012