Embassy of India
Belgium, Luxembourg & the European Union

AGRI WATCH

Vol. 2 & 3, Sept.- Oct. 2020

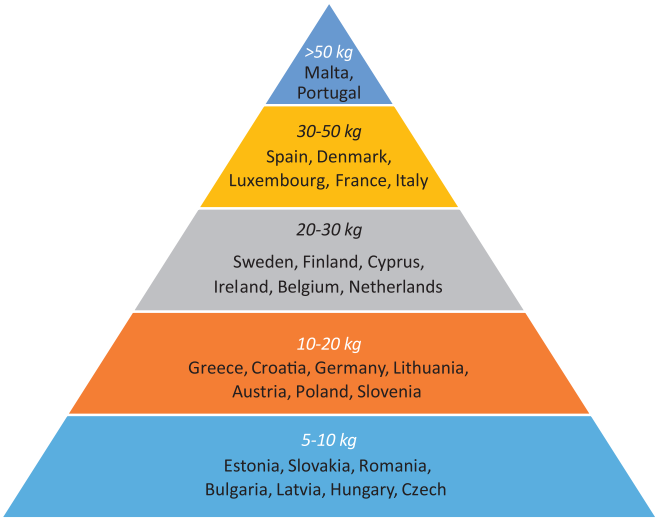
Special Issue : *Fisheries and Aquaculture*

Market Scenario

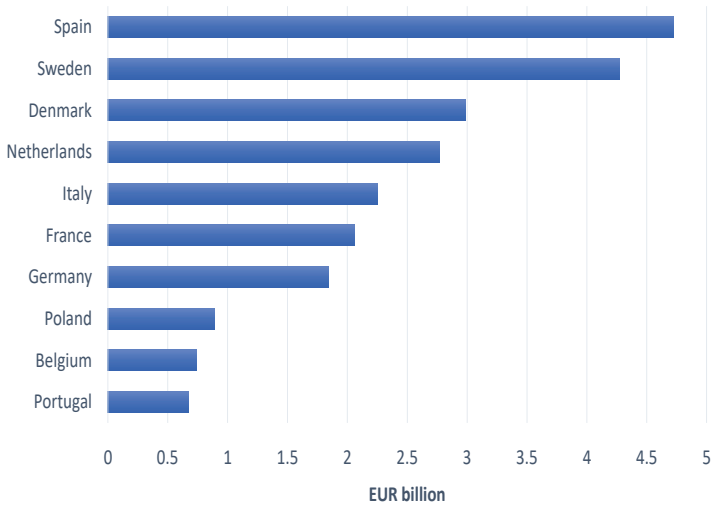
Aqua-food is an important source of animal protein supply in European diets. The EU (EU-28) reported the highest expenditure on fish in the world (over € 54 billion in 2017). As the demand far outstrips the domestic production, EU-27 is world's top import market for fisheries and aquaculture, with the average import volume of 5.37 million tonnes (2017-2019), equivalent to € 25.66 billion.

Spain, Sweden, Denmark, the Netherlands and Italy are the leading destinations of extra-EU imports of fishery and aquaculture products.

Per-capita apparent annual consumption (kg liveweight) of fishery and aquaculture products in EU: 2018[1]



Top 10 Member States: value of extra-EU imports (2019)[2]



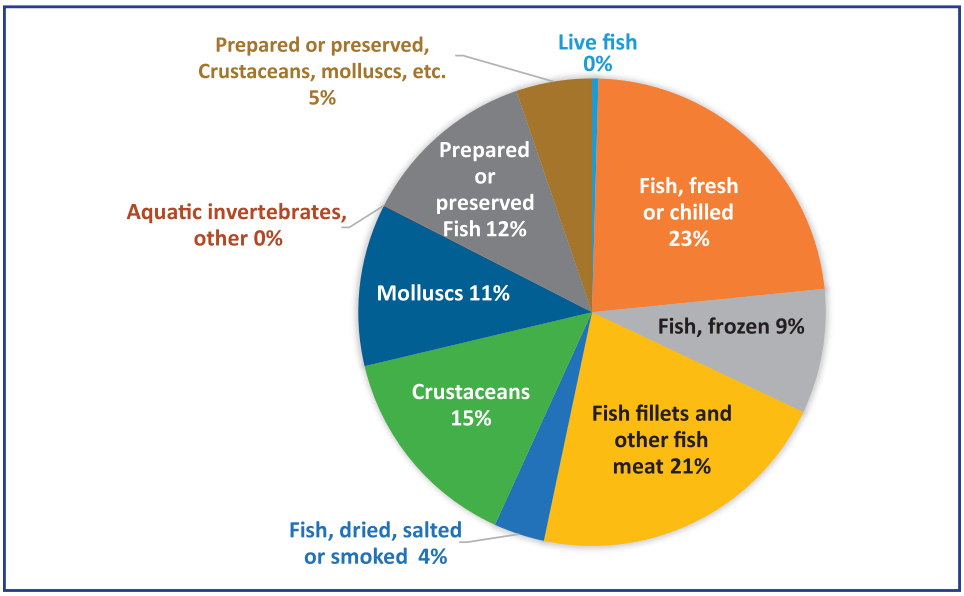
Possible impact of Covid-19

EU-27 imports	World	India
Jan.-Sept2020 vs Jan.-Sept. 2019[2]	↓ €1.6 billion (-8.7%)	↓ €73.5 million (-14.5%)

[1] Source: EUMOFA
https://www.eumofa.eu/documents/20178/415635/EN_The+EU+fish+market_2020.pdf/fe6285bb-5446-ac1a-e213-6fd6f64d0d85?t=1604671147068

[2] Data source: EUROSTAT

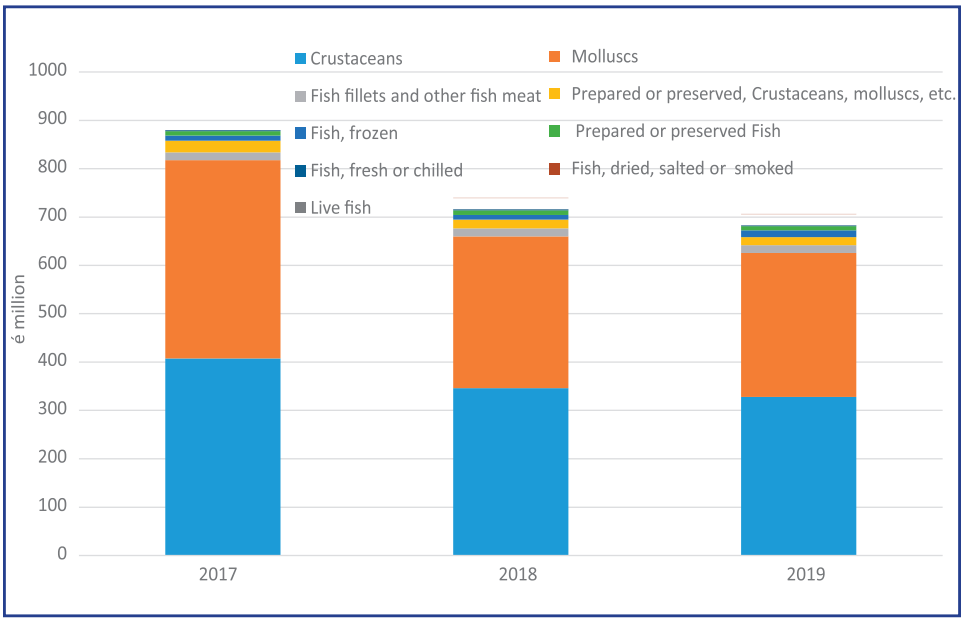
Share of product groups (HS 4 digit) in extra-EU value of imports: TE 2019[3]



India in EU Markets

India has about 3% share in the EU markets, comprising of mostly crustaceans and molluscs. The total value of exports from India has declined during past 3 years although import demand in EU has been rising.

Trend in supply from India to EU-27[3]



Key products in extra-EU import basket[4]

- Among imports of salmonids, salmon represents 98% of the total and about one quarter of the extra-EU imports of fishery and aquaculture products (2019) in value terms.
- In crustaceans, shrimps represented close to 90% of total value, mostly including frozen warm water shrimps of the genus Penaeus.
- Also there is market of about € 1.89 billion for shrimps and prawns not related to "Pandalidae", "Crangon", deep-water rose shrimps "Parapenaeus longirostris" and "Penaeus"
- Groundfish imports in the EU are driven by cod and Alaska pollock.
- Tunas imports worth € 3.17 billion (2019) almost entirely consist of processed products, 72% canned and 28% frozen. Skipjack is the main tuna species that is imported followed distinctly by yellowfin tuna.

Main Competitors: Ecuador, Vietnam, Morocco, China, Argentina

[3] Data source: EUROSTAT
[4] Data source: EUMOFA

India's export potential to EU: top 12 product groups[5]

Product Groups	US$ million
Shrimps & prawns, frozen	1700.0
Fish meat, frozen	80.0
Fish nes, whole, frozen	12.8
Fish nes, cured	19.1
Octopus, frozen, smoked, frozen, dried, salted or in brine	7.2
Fish nes, whole, fresh	10.3
Fish fillets, frozen	7.0
Other crustaceans, frozen	2.9
Crabs, fresh or chilled, dried, salted, smoked or in brine	3.9
Shrimps & prawns, live, fresh/chilled, cured	1.7
Ornamental fish	1.4
Lobster	1.4

Regulatory Framework

- Only EU approved countries and accredited processing facilities can export fish and aquaculture products to EU.
- Each shipment of seafood products must be accompanied by a Catch (for sea caught products) and a Sanitary Certificate.
- Catch certificate is to prove that exported fish and seafood comes from legal sources in compliance with the EU Regulation to prevent, deter and eliminate illegal, unreported and unregulated (IUU) fishing.
- Sanitary certificate is to certify that exported consignment is as per the EU food and feed safety standards.
- The EU has strict and complex regulations on maximum residue levels (MRL) for fish and seafood. Maximum levels are set for residues of pharmacologically active substances in food of animal origin, such as antibiotics, certain environmental contaminants such as arsenic, cadmium, lead and mercury; substances classified as "feed additives" in the European Union (coccidiostats and histomonostats).
- Inspections of consignments (documentary, identity and physical check) originating from third countries is carried out on all consignments, at the first point of entry into the EU territory and at approved border inspection posts.
- Products that are found to be non-compliant with EU standards are reported in the Rapid Alert System for Food and Feed (RASFF). There are different types of offences under RASFF, including border rejection and destruction of consignment.
- Labelling regulations must be strictly followed. Mandatory particulars such as the name of the food, the list of ingredients, t he quantity of the food, the date of minimum durability or the 'use by date', nutrition declaration and many others, should be included in the label.

Useful Links

1. The European Market Observatory for fisheries and aquaculture (EUMOFA) https://www.eumofa.eu/
2. AIPCE (EU Fish Processors and Traders Association) and CEP (European Federation of National Organizations of Importers and Exporters of Fish) https://www.aipce-cep.org/
3. Compliance of Imports of Fishery and Aquaculture Products in the EU - https://www.europarl.europa.eu/RegData/etudes/etudes/join/2013/513968/IPOL-PECH_ET(2013)513968_EN.pdf
4. Centre for the Promotion of Imports from developing countries (CBI) https://www.cbi.eu/market-information/fish-seafood.

[5] Source https://exportpotential.intracen.org/

Compilation:
Dr. Smita Sirohi, Adviser (Agri. & Marine Products)
Ms. Ridhima Shrivastava, Marketing Assistant