

Conxemar Congress  
„Analysis of the European ports“

„The trade flows of white fish and the  
role of ports in the EU“



Speaker: Dr. Matthias Keller

# The trade flows of white fish and the role of ports in the EU

## FOOD BALANCE FOR FISH AND FISHERY PRODUCTS

1000 tonnes live weight

	EU (15)							EU (25)			
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Catches	8.146	8.009	7.628	7.357	7.414	7.922	7.536	7.430	7.033	6.974	6.940
- Non-food uses	2.172	2.146	1.822	2.100	2.500	3.000	2.600	2.600	2.600	2.600	2.500
= Catches for consumption	5.974	5.863	5.806	5.257	4.914	4.922	4.936	4.830	4.433	4.374	4.440
+ Imports (Third countries)	5.963	6.595	6.007	6.422	7.050	6.735	7.477	7.993	8.355	8.993	9.712
= Total supply	11.937	12.458	11.813	11.679	11.964	11.657	12.413	12.823	12.788	13.367	14.152
- Exports (Third countries)	1.545	1.459	1.610	1.654	1.879	1.752	1.995	2.239	2.196	2.040	1.856
= Supply for consumption	10.392	10.999	10.203	10.025	10.085	9.905	10.418	10.584	10.592	11.327	12.296
Total supply (kg/caput)	32	33	31	31	32	31	33	34	28	29	31
by catches for consumption in %	50	47	49	45	41	42	40	38	35	33	31
by third countries imports in %	50	53	51	55	59	58	60	62	65	67	69
Supply for consumption (kg/caput)	28,0	29,5	27,2	26,7	26,7	26,2	27,4	27,7	23,0	24,4	26,5
Self-sufficiency (%)	57	53	57	52	49	50	47	46	42	39	36

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

## "ORIGIN OF IMPORTS OF IMPORTANT WHITE FISH 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	2005	2006	2005	2006	2005	2006
<b>Total</b>	<b>311</b>	<b>320</b>	<b>2.691</b>	<b>2.787</b>	<b>3.002</b>	<b>3.107</b>
Cod	125	131	991	982	1.116	1.113
Alaska-Pollock	-	-	687	811	687	811
Hake	44	41	566	553	610	594
Saithe	55	68	170	165	225	233
Haddock	60	52	144	143	204	195
A. Redfish	27	28	98	92	125	120
Plaice	68	71	13	13	81	84
Hoki	-	-	35	41	35	41

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

## Overview of the Findings of the AIPCE White Fish Study 2007

### Trends of the development of important fish species

Ranking	Species	Supply (t)	Total (%)	EU (%)	Third country (%)
1	Cod	1.113.689	0	5	-1
2	Alaska-Pollock	810.846	18	-	18
3	Salmon	705.948	5	?	5
4	Hake	593.789	-3	-6	-2
5	Saithe	232.725	3	22	-3
6	Pangasius	228.993	56	-	56

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

## Overview of the Findings of the AIPCE White Fish Study 2007

### Trends of the development of important fish species

Ranking	Species	Supply (t)	Total (%)	EU (%)	Third country (%)
7	Haddock	194.815	-4	-14	-1
8	Nile perch	123.193	-9	-	-9
9	Redfish	120.019	-6	-5	-6
10	Plaice	82.832	3	4	-3
11	Hoki	41.325	19	-	19
12	Pike-perch	29.632	-13	-	-13

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

Origin of imports into EU from third countries for important white fish species

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2003	2004	2005	2006	2006	06/05
<b>Whole, fresh</b>	<b>201.595</b>	<b>205.511</b>	<b>195.898</b>	<b>171.922</b>	<b>100</b>	<b>-12</b>
of it from Norway	67.959	61.063	54.206	49.274	29	-9
Iceland	31.418	45.540	47.383	47.769	28	1
Faroe Isles	41.517	35.479	32.860	20.595	12	-37
Russia	1.136	813	2.262	1.316	1	-42
South Africa	21.815	19.144	19.731	18.309	11	-7
Namibia	5.899	6.793	7.187	5.551	3	-23
<b>Whole, frozen</b>	<b>329.711</b>	<b>306.844</b>	<b>280.874</b>	<b>309.568</b>	<b>100</b>	<b>10</b>
of it from Norway	23.757	26.328	33.939	36.143	12	6
Iceland	19.430	16.889	14.397	19.469	6	35
Faroe Isles	2.233	2.353	1.160	2.331	1	101
Russia	118.061	101.352	96.306	97.298	31	1
South Africa	26.066	25.322	21.543	18.204	6	-15
Argentina	41.298	32.985	17.036	24.185	8	42
Namibia	27.957	29.904	17.199	19.177	6	12

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

Origin of imports into EU from third countries for important white fish species

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2003	2004	2005	2006	2006	06/05
<b>Fillet, fresh</b>	<b>45.335</b>	<b>62.735</b>	<b>71.974</b>	<b>70.351</b>	<b>100</b>	<b>-2</b>
of it from Norway	9.451	15.438	20.917	21.796	31	4
Iceland	29.361	40.474	43.949	40.393	57	-8
Faroe Isles	5.886	6.579	6.753	7.633	11	13
<b>Fillet, frozen</b>	<b>1.606.871</b>	<b>1.631.693</b>	<b>1.644.927</b>	<b>1.741.859</b>	<b>100</b>	<b>6</b>
of it from Norway	102.759	96.643	89.973	75.889	4	-16
Iceland	164.922	186.350	189.364	181.855	10	-4
Faroe Isles	47.644	53.286	57.477	59.820	3	4
Russia	183.850	126.490	125.357	144.071	8	15
South Africa	37.840	34.421	37.270	25.200	1	-32
Argentina	163.144	151.316	127.617	136.092	8	7
Namibia	140.164	117.119	111.795	96.467	6	-14
USA	185.132	288.693	289.990	252.174	14	-13
New Zealand	52.359	34.346	31.187	36.671	2	18
China	437.307	463.727	515.962	656.870	38	27

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

Origin of imports into EU from third countries for important white fish species

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2003	2004	2005	2006	2006	06/05
<b>Meat, frozen</b>	<b>136.800</b>	<b>141.889</b>	<b>131.400</b>	<b>156.674</b>	<b>100</b>	<b>19</b>
of it from Norway	6.868	4.850	4.415	2.530	2	-43
Iceland	14.507	14.103	15.109	13.667	9	-10
Faroe Isles	9.408	11.292	9.791	15.266	10	56
Russia	19.008	11.825	14.538	24.626	16	69
USA	29.195	34.360	27.578	28.044	18	2
Argentina	10.998	12.499	7.904	12.797	8	62
Namibia	25.792	29.257	23.753	25.445	16	7
China	4.170	6.050	11.080	16.796	11	52
<b>Fish and Fillet, dry/salted</b>	<b>370.042</b>	<b>376.580</b>	<b>366.263</b>	<b>336.091</b>	<b>100</b>	<b>-8</b>
of it from Norway	177.982	187.582	182.676	184.628	55	1
Iceland	109.897	111.224	119.769	99.772	30	-17
Supply (Catches + Import)	3.014.242	3.049.140	3.004.797	3.106.208	100	3

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

Origin of imports into EU from third countries for important white fish species

Origin	Quantity (tonnes live weight)				Share (%)	Change (%)
	2003	2004	2005	2006	2006	06/05
Supply (Catches + Import)	3.014.242	3.049.140	3.004.797	3.106.208	100	3
of it catches of quoted species	323.888	323.888	313.460	319.741	10	2
import from third countries	2.690.354	2.725.252	2.691.337	2.786.467	90	4
of it from China	445.406	474.088	535.329	684.376	25	28
Iceland	369.576	414.620	429.972	402.925	14	-6
Norway	388.776	387.797	386.126	361.711	13	-6
USA	256.199	371.151	374.874	343.107	12	-8
Russia	342.578	261.751	255.313	277.218	10	9
Argentina	216.893	198.735	153.722	174.030	6	13
Namibia	199.812	183.073	159.935	146.640	5	-8
Faroe Isles	146.107	141.111	130.963	124.686	4	-5
South Africa	93.543	88.584	86.943	66.300	2	-24
Chile	68.873	50.169	39.041	41.253	1	6
New Zealand	58.575	40.244	37.783	44.168	2	17
Uruguay	35.209	39.593	34.940	37.000	1	6
Peru	4.326	13.634	17.906	19.234	1	7

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

Origin of imports into EU from third countries for freshwater fish

Origin	Quantity (tonnes live weight)			Share (%)	Change (%)
	2004	2005	2006	2006	06/05
<b>Whole, fresh</b>	<b>3.954</b>	<b>3.654</b>	<b>3.901</b>	<b>100</b>	<b>7</b>
of it from Kenia	224	230	336	6	46
Norway	13	12	3	0	-72
Russia	2.274	1.562	910	43	-42
Tansania	215	203	155	6	-24
Uganda	1.091	1.561	2.351	43	51
<b>Whole, frozen</b>	<b>25.344</b>	<b>28.741</b>	<b>37.308</b>	<b>100</b>	<b>30</b>
of it from Bangladesh	2.673	3.597	3.761	13	5
China	547	1.886	3.412	7	81
Indonesia	2.523	1.592	1.733	6	9
Kenia	482	473	1.085	2	130
Tansania	1.219	1.118	1.716	4	54
Thailand	4.270	6.797	9.393	24	38
Uganda	1.376	1.794	1.912	6	7
Vietnam	2.620	1.468	1.708	5	16

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

Origin of imports into EU from third countries for freshwater fish

Origin	Quantity (tonnes live weight)			Share (%)	Change (%)
	2004	2005	2006	2006	06/05
<b>Fillet, fresh</b>	<b>110.719</b>	<b>110.857</b>	<b>92.555</b>	<b>100</b>	<b>-17</b>
of it from Kenia	12.653	8.234	6.758	7	-18
Russia	2.880	3.120	2.157	3	-31
Tansania	56.298	47.171	39.505	43	-
Uganda	36.816	46.632	41.051	42	-12
Vietnam	698	2.003	1.636	2	-18
<b>Fillet, frozen</b>	<b>95.399</b>	<b>150.485</b>	<b>300.252</b>	<b>100</b>	<b>100</b>
of it from China	118	2.689	9.229	2	243
Indonesia	3.710	2.863	3.446	2	20
China	118	2.689	9.229	2	243
Kenia	2.368	3.468	2.710	2	-22
Kasachstan	8.031	12.166	11.462	8	-6
Russia	14.870	16.247	13.895	11	-14
Tansania	12.998	18.246	19.390	12	6
Uganda	4.467	6.256	6.083	4	-3
Vietnam	44.451	84.396	228.993	56	171

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

Origin of imports into EU from third countries for freshwater fish

Origin	Quantity (tonnes live weight)			Share (%)	Change (%)
	2004	2005	2006	2006	06/05
<b>Meat, fresh</b>	<b>3.208</b>	<b>2.476</b>	<b>2.980</b>	<b>100</b>	<b>20</b>
of it from Norway	246	171	295	7	-
Sri Lanka	12	3	256	0	8231
USA	866	1.191	1.272	48	7
<b>Meat, frozen</b>	<b>4.258</b>	<b>7.215</b>	<b>8.122</b>	<b>291</b>	<b>13</b>
of it from Chile	431	2.303	2.174	32	-6
Norway	671	978	1.592	14	63
Vietnam	238	737	1.193	10	62
Supply (Catches + Import)	242.882	303.427	445.118	100	47

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

Origin of imports into EU from third countries for freshwater fish

Origin	Quantity (tonnes live weight)			Share (%)	Change (%)
	2004	2005	2006	2006	06/05
Supply (Catches + Import)	242.882	303.427	445.118	100	47
of it catches of quoted species	-	-	-	-	
import from third countries	242.882	303.427	445.118	100	47
of it from Vietnam	48.007	88.603	233.531	52	164
Tanzania	71.040	66.938	60.766	14	-9
Uganda	43.826	56.299	51.538	12	-8
Russia	20.957	21.618	17.935	4	-17
Kasachstan	8.209	12.405	11.697	3	-6
Kenia	15.727	12.416	10.889	2	-12
China	606	3.195	10.017	2	213
Thailand	4.270	6.797	9.393	2	38

Source: AIPCE White Fish Study 2007

# The trade flows of white fish and the role of ports in the EU

## The most important seafood import products from third countries

CN-Code	Product	2004	2005	2006
		Tons (product weight)		
0302 1200	Salmon, fresh	306.415	324.467	340.890
0306 1350	Shrimps, frozen (Penaeus)	211.675	226.413	276.184
0304 2085	Alaska-Pollock, fillet, frozen	228.593	219.902	259.352
1604 1418	Tuna, prepared	232.372	243.362	236.652
1604 1411	Tuna, in oil	126.329	144.439	150.733
0304 2019	Freshwater fillet, frozen	42.973	67.786	135.174
0307 4938	Calmar, Loglio, frozen	112.407	123.844	129.597
0304 2029	Cod fillet, frozen	93.006	104.900	110.852
0306 1380	Shrimps, other, frozen	91.557	102.994	106.234
0307 9911	Calmar, Illex, frozen	50.024	69.807	103.929

Source: EUROSTAT

# The trade flows of white fish and the role of ports in the EU

## The most important seafood import products from third countries

CN-Code	Product	2004	2005	2006
		T€		
0306 1350	Shrimps, frozen (Penaeus)	1.136.722	1.196.919	1.510.074
0302 1200	Salmon, fresh	846.852	1.094.953	1.398.936
0306 1380	Shrimps, other, frozen	474.523	547.622	599.230
1604 1418	Tuna, prepared	486.802	510.697	545.034
0304 2029	Cod fillet, frozen	394.359	469.751	543.646
0304 2085	Alaska-Pollock, fillet, frozen	383.479	402.896	519.611
0304 2019	Freshwater fillet, frozen	127.703	193.328	376.171
1604 1411	Tuna, in oil	270.483	328.328	361.799
0307 4938	Calmar, Loglio, frozen	238.843	276.126	310.195
0307 9911	Calmar, Illex, frozen	95.888	151.087	137.130
	10 listed products	4.455.654	5.171.707	6.301.826

Source: EUROSTAT

# The trade flows of white fish and the role of ports in the EU

## The most important seafood imports from third countries per species and EU-countries

Product	2005	2006	06/05	2005	2006	06/05
	tons		(%)	T€		(%)
<b><u>0306 1350/1380: Shrimps</u></b>						
<b>EU</b>	<b>329.407</b>	<b>382.733</b>	<b>16,2</b>	<b>1.744.541</b>	<b>2.109.304</b>	<b>20,9</b>
Spain	113.943	141.542	24,2	594.023	776.424	30,7
France	61.585	75.713	22,9	344.646	421.560	22,3
Italy	38.979	44.617	14,5	218.597	253.187	15,8
United Kingdom	31.544	34.111	8,1	160.316	190.082	18,6
Netherlands	30.839	24.438	-20,8	144.596	132.309	-8,5

Source: EUROSTAT

# The trade flows of white fish and the role of ports in the EU

## The most important seafood imports from third countries per species and EU-countries

Product	2005	2006	06/05	2005	2006	06/05
	tons		(%)	T€		(%)
<b><u>0302 1200: Salmon, fresh</u></b>						
<b>EU</b>	<b>324.467</b>	<b>341.116</b>	<b>5,1</b>	<b>1.094.953</b>	<b>1.398.936</b>	<b>27,7</b>
Sweden	139.928	164.663	17,7	475.106	672.437	41,5
Denmark	116.980	111.100	-5,0	387.580	458.347	18,2
Germany	33.338	27.680	-17,0	114.856	115.915	0,9
United Kingdom	18.061	16.079	-11,0	64.121	69.180	7,8
Netherlands	311	4.672	1404,2	1.004	16.320	1526,1

Source: EUROSTAT

# The trade flows of white fish and the role of ports in the EU

## The most important seafood imports from third countries per species and EU-countries

Product	2005	2006	06/05	2005	2006	06/05
	tons		(%)	T€		(%)
<b><u>1604 1418: Tuna, prepared</u></b>						
<b>EU</b>	<b>234.362</b>	<b>237.016</b>	<b>1,1</b>	<b>510.697</b>	<b>545.034</b>	<b>6,7</b>
United Kingdom	93.231	91.120	-2,3	196.162	197.169	0,5
France	58.750	63.254	7,7	140.348	158.653	13,0
Spain	12.868	20.883	62,3	32.161	59.787	85,9
Germany	19.048	21.658	13,7	34.808	41.554	19,4
Netherlands	24.769	15.500	-37,4	51.099	33.561	-34,3

Source: EUROSTAT

# The trade flows of white fish and the role of ports in the EU

## The most important seafood imports from third countries per species and EU-countries

Product	2005	2006	06/05	2005	2006	06/05
	tons		(%)	T€		(%)
<b><u>0304 2029: Cod fillet, frozen</u></b>						
<b>EU</b>	<b>104.900</b>	<b>111.025</b>	<b>5,8</b>	<b>469.751</b>	<b>543.646</b>	<b>15,7</b>
United Kingdom	54.331	58.914	8,4	250.237	300.546	20,1
Netherlands	17.618	16.797	-4,7	73.992	76.770	3,7
Spain	7.856	10.440	32,9	31.110	43.290	39,1
Sweden	6.102	5.385	-11,8	34.716	34.217	-1,4
Germany	7.797	7.659	-1,8	30.757	32.033	4,1

Source: EUROSTAT

# The trade flows of white fish and the role of ports in the EU

## The most important seafood imports from third countries per species and EU-countries

Product	2005	2006	06/05	2005	2006	06/05
	tons		(%)	T€		(%)
<b><u>0304 2085: Alaska-Pollock, fillet, frozen</u></b>						
<b>EU</b>	<b>219.902</b>	<b>259.671</b>	<b>18,1</b>	<b>402.896</b>	<b>519.611</b>	<b>29,0</b>
Germany	120.546	154.761	28,4	222.911	317.820	42,6
France	24.669	29.533	19,7	46.536	61.475	32,1
Poland	26.598	29.938	12,6	40.040	44.851	12,0
Netherlands	19.022	12.796	-32,7	38.311	28.687	-25,1
United Kingdom	11.799	12.428	5,3	23.980	27.221	13,5

Source: EUROSTAT

# The trade flows of white fish and the role of ports in the EU

## The most important seafood imports from third countries per species and EU-countries

Product	2005	2006	06/05	2005	2006	06/05
	tons		(%)	T€		(%)
<b><u>0304 2019: Freshwater fillet, frozen</u></b>						
<b>EU</b>	<b>67.786</b>	<b>135.242</b>	<b>99,5</b>	<b>193.328</b>	<b>376.171</b>	<b>94,5</b>
Germany	16.692	21.093	26,4	56.072	72.138	28,6
Netherlands	11.436	26.198	129,1	31.072	71.032	128,6
Spain	11.659	24.810	112,8	29.424	64.003	117,5
Poland	4.444	24.873	459,6	10.294	53.513	419,8
Belgium	8.583	13.010	51,6	19.962	33.581	68,2

Source: EUROSTAT

# The trade flows of white fish and the role of ports in the EU

## The most important seafood imports from third countries per species and EU-countries

Product	2005	2006	06/05	2005	2006	06/05
	tons		(%)	T€		(%)
<b><u>1604 1411: Tuna, in oil</u></b>						
<b>EU</b>	<b>144.439</b>	<b>150.992</b>	<b>4,5</b>	<b>328.328</b>	<b>361.799</b>	<b>10,2</b>
Italy	21.092	20.863	-1,1	68.939	78.200	13,4
Germany	34.390	38.390	11,6	58.817	71.285	21,2
United Kingdom	29.630	31.257	5,5	67.162	71.007	5,7
Spain	12.738	16.594	30,3	29.522	40.496	37,2
Netherlands	17.402	13.407	-23,0	38.489	30.835	-19,9

Source: EUROSTAT

# The trade flows of white fish and the role of ports in the EU

## The most important seafood imports from third countries per species and EU-countries

Product	2005	2006	06/05	2005	2006	06/05
	tons		(%)	T€		(%)
<b><u>0307 4938: Calmar, Loglio, frozen</u></b>						
<b>EU</b>	<b>123.844</b>	<b>129.895</b>	<b>4,9</b>	<b>276.126</b>	<b>310.195</b>	<b>12,3</b>
Italy	40.889	47.289	15,7	107.001	137.213	28,2
Spain	59.091	53.175	-10,0	120.595	105.310	-12,7
France	4.712	5.444	15,5	9.670	12.112	25,2
Portugal	2.109	3.425	62,4	4.710	8.530	81,1
Belgium	2.982	2.460	-17,5	7.401	5.851	-20,9

Source: EUROSTAT

# The trade flows of white fish and the role of ports in the EU

## The most important seafood imports from third countries per species and EU-countries

Product	2005	2006	06/05	2005	2006	06/05
	tons		(%)	T€		(%)
<b><u>0307 9911: Calmar, Illex, frozen</u></b>						
<b>EU</b>	<b>69.807</b>	<b>104.336</b>	<b>49,5</b>	<b>151.087</b>	<b>137.130</b>	<b>-9,2</b>
Spain	57.938	91.819	58,5	131.024	121.363	-7,4
Italy	8.964	9.217	2,8	13.268	9.585	-27,8
United Kingdom	816	945	15,8	2.124	2.035	-4,2
Netherlands	574	832	44,8	1.386	1.742	25,7
Belgium	297	389	31,0	614	727	18,4

Source: EUROSTAT

# The trade flows of white fish and the role of ports in the EU

## The 10 most important EU-countries with respect to the imports into EU of the 10 most important third country seafood products

Product	2005	2006	06/05	2005	2006	06/05
	tons		(%)	T€		(%)
<b>Total per country:</b>						
<b>EU</b>	<b>1.618.914</b>	<b>1.852.025</b>	<b>14,4</b>	<b>5.171.708</b>	<b>6.301.825</b>	<b>21,9</b>
Spain	277.744	361.426	30,1	971.039	1.214.971	25,1
United Kingdom	241.360	247.715	2,6	768.365	864.370	12,5
Sweden	157.943	183.490	16,2	536.939	739.178	37,7
Germany	246.838	287.695	16,6	592.465	736.105	24,2
France	163.630	189.643	15,9	581.136	702.750	20,9
Denmark	138.791	134.743	-2,9	461.455	541.089	17,3
Italy	117.841	134.608	14,2	428.422	510.521	19,2
Netherlands	124.522	117.467	-5,7	385.233	397.029	3,1
Poland	38.343	61.970	61,6	66.195	116.425	75,9
Belgium	47.462	55.376	16,7	57.831	68.099	17,8

Source: EUROSTAT

