



*EU Fish Processors and Traders Association
Association des Industries du Poisson de l'UE*

*EU Federation of National Organisations of Importers and Exporters of Fish
Comité des Organisations nationales des importateurs et exportateurs de
poisson de l'UE*

A.I.P.C.E./C.E.P

FINFISH STUDY 2009

A.I.P.C.E./C.E.P

EU Fish Processors and Traders Association

Brussels, October 2009

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1. The Purpose of the Finfish Study

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

There have been significant changes in both the sources and conditions of supply in fish raw materials since the first AIPCE/CEP annual whitefish report was issued nineteen years ago. Since that time, there have been enormous developments in the added value market, both in volume and product sophistication. Coupled with this, sources of the raw material supply and of location of primary processing have moved out of Europe to a large extent. Newer species to Europe have been introduced into the market, both to grow the overall market, but also to compensate for the decline of some traditional species from national waters. Important developments in the utilisation of tuna into the chill and frozen markets has led to the inclusion of catch and import data for this group of species into the report for the first time. Salmon species were incorporated two studies ago, along with an appraisal of the ever-growing importance of aquaculture products, including Pangasius. As a result, the report has been renamed this year as the Finfish Study.

Such significant changes in supply and demand bring with them new challenges, some which are not only of direct concern to processors, but to all stakeholders, most important of whom are the consumers. Among these challenges can be included sustainable fisheries, ethical and legal supply, including the growing demand for ecolabelled products, plus of course international trade and tariff considerations.

Supply statistics in this report are based on analysis and interpretation of EU Eurostat data. Key developments highlighted in the report that are impacting supply, are based on the experience of AIPCE/CEP members and the proactive steps that they have taken to either enable supply or to mitigate potential supply issues. The aim is to ensure a regular, consistent and price competitive supply base that meets stakeholder and consumer expectations.

2. Overview of the Study Findings

2.1 Data Base

This report is largely based on statistics taken from Eurostat 2008 data and refers to the entire EU 27 group of member states. Other data is ascribed to source. Eurostat provide information by fishery product, species and/or category. Since the intent of this study is to understand the actual quantities of fish utilised, conversion factors are used to back-calculate to live weight equivalent of the fish (WFE). Accordingly, all tables and figures in the study refer to whole weight of fish.

Whilst this is primarily a whitefish report, fish supply fluctuations, product innovations and added value developments utilising a wider range of species, have resulted in a gradual broadening of the scope of the document. Fresh water aquaculture species, such as pangasius were initially included in 2006, followed by salmon species, surimi-base and surimi presentations in 2008, whilst this year, tuna species have been included, reflecting the growing interest in tuna loins for further processing.

Eurostat and Customs codes do not identify certain species individually, so that, for example, species such as pangasius, Nile perch, and tilapia are all classified together. Such species are increasingly important to the processing economy in Europe, so AIPCE/CEP has been seeking to rectify these data deficiencies with the EU Commission. A separate evaluation of pangasius has again been completed to demonstrate the growing importance of this species.

2.2 Conversion Factors to Calculate Live Weight of Fish

Eurostat data for fishery products do not estimate the amount of whole fish from which the fishery products are derived. In order to estimate live weight from these data, AIPCE/CEP previously back-calculated these values by using official German Government conversion factors, but from the previous 2008 report, new conversion factors were adopted which are based on actual processing yields derived from AIPCE/CEP members.

Primary processing fishery product yields have increased significantly over recent years. This can be attributed to a number of changes including improved on-board vessel handling systems through to hand filleting in China and other third countries. For cod, this leads to a conservative estimated increase in fillet yield of 7 %, (18 % when expressed as a yield efficiency gain) based on 2007 data.

2.3 Key Finding From Statistical Analysis

Whilst the data is for 2008, discussion and comment within the report takes account of the changing supply and political developments up until September 2009.

The overall supply trends are following those of previous years with declining supplies from EU waters and huge reliance on third country imports. Additionally, there is also a growing reliance on aquaculture imports, some of which are replacements for the declining marine-capture white fish supplies.

Total fish supply from both EU landings and imports declined slightly in 2008 leading to an overall available volume of 14.5 million tons. When exports of 2 million tons are subtracted, this left an available volume for consumption in the EU of 12.5 million tons.

The overall reliance on fishery product imports was 65 % in 2008.

For the whitefish species, which are of particular importance to AIPCE, reliance on imports continued to be at the level of 90 %.

Cod imports declined to 849 thousand tons (WFE), whilst Alaska pollock imports rose to 906 thousand tons. This is the first time that cod has not featured as the main white fish species when measured at whole fish equivalent.

The NEAFC (North East Atlantic Fisheries Commission) Port State Control mechanism came into force on first May 2007, which had a positive impact in the fight to reduce cod and haddock IUU fish from the Barents Sea. This, along with controls brought into force in the eastern Baltic Sea, coupled with specific AIPCE supply control measures, contributed to the reduced cod imports.

All salmon species, both wild and aquaculture now account for almost 1 million tons of fish with a significant part of the wild fish being canned.

Pangasius from aquaculture continues to rise in importance, both to compensate for declining marine-capture whitefish species, but also for market development. 224 thousand tons of glazed fillets; equivalent to 688 thousand tons whole fish was imported.

2.4 Costs

Like every other industrial and economic activity, the global economic crisis has impacted the whole fishing and supply sector in many ways. Fuel and energy costs; feed costs for aquaculture and volatile currency exchange rates dominate. Consumers have also been down trading across the whole food sector.

Other factors impacting price realisation include changing fishing quotas, ability to land fish to meet demand and processing capabilities as well as the welcome positive progress in IUU controls.

2.5 Labelling, Quality and Authenticity of Imports

Very much linked to costs and flat pricing for fish raw materials, concerns have been expressed by sectors of the industry that quality and labelling of some imports do not match that of nationally EU caught fish and aquaculture products. AIPCE/CEP members invest heavily to ensure that imported fishery products comply with the highest standards and many of the third country processing plants producing semi-processed products are comparable to the best to be found anywhere.

Obviously all third country processing plants and imports are subject to audit by EC, DG Sanco veterinarians, both on site and at ports of entry, but they also have to meet the rigorous specifications, standards and audit/third party audit of their customers.

Mislabelling and misrepresentation is a potential problem that can occur in both imported and nationally prepared products. It is an issue that affects all sectors of the fishing industry and AIPCE/CEP certainly supports enforcement action to ensure that its member organisations and their members are not disadvantaged.

2.6 Ecolabelling

Final proposals for minimum criteria for third party EU ecolabelling requirements for fishery products are anticipated from DG Mare before the end of 2009. Future developments within this initiative are anticipated to include extensions of scope beyond that of fish stock sustainability. However, many AIPCE/CEP members, brand owners along with their retailing and food service customers are committed to the MSC label, which asserts to be FAO minimum criteria compliant. There is evidence of consumer fatigue/confusion over the proliferation of green claims on-pack, so there will be marketing reluctance to create further labels beyond current available choices.

MSC fishery certifications are now accounting for over 4 % of the world's fisheries with a further 3 % in process. Key AIPCE/CEP fish species, including USA Alaska pollock, Pacific cod, S. African hake, New Zealand hoki and Alaska salmon are already MSC certified. It is particularly pleasing, however, to see the interest and successful MSC certifications within EU waters.

2.7 Carbon Footprint

Carbon footprint and food miles within the fishing industry and in particular, the processing sector has received much attention over the past 2 years. This has been linked, in particular to the practice of carrying out primary processing in third countries in S.E. Asia. A number of studies are now being published that demonstrate that the bulk transport is only a small part of the energy cycle. This is a subject of considerable complexity and is for each supply chain to consider.

2.8 EC IUU Regulations

DG Mare launched the consultation on their proposed IUU legislation in October 2007, with a final text agreed in June 2008, coming into force on 1st January 2010. Additionally, implementing regulations are required, the final version of which, along with an accompanying guidance document, are expected in the autumn of 2009. This whole process, including consultation, will therefore have taken less than 3 years, an impressive achievement for such major and complex legislation, but with the final implementing regulations being published so close to the enforcement date, there may be some potential teething problems in the early months of 2010.

AIPCE/CEP has worked with DG Mare, as have member organisations with their governments, to reach a practical approach towards implementation of these regulations. Whilst being pleased with changes made to ease the application, but without compromising intent, AIPCE/CEP still has a number of concerns over final implementation. First among these is that there still seems to be a lack of clarity and understanding in third countries, despite training workshops carried out by DG Mare. Secondly, it still seems to be unclear as to which authorities in member states will be enforcing the regulations.

With only 3 months implementation, a period of pragmatism is essential whilst problems are resolved.

2.9 Control Regulation

The control regulation, applying to EU fishing activities and distribution of resulting fishery products, has been brought to final consultation in an even shorter period than were the IUU regulations. However, they have yet to be finalised, which means that the January 2010 timetable is even more ambitious. AIPCE accepts that they are essential to complement the IUU regulations, but remains concerned about the labelling and traceability requirements in the regulation. These requirements are currently covered in detail in existing regulations, so that to include them in the control regulation using different descriptions can only serve to confuse and complicate smooth implementation.

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

3.1 Explanation of Derivation of Factors for Calculating Live Weight (WFE) of Fish From Fishery Products

When publishing fishery product statistics Eurostat does not include a back-calculation to estimate the weight of whole live weight fish utilised (WFE).

During the first 16 years of the Whitefish Study, for comparative consistency, the conversion factors used by AIPCE/CEP to back-calculate the equivalent amount of whole live weight equivalent of fishery product imports have been those adopted by the German Government. Each EU member state and third country has its own official conversion factors that will have been based on scientific observation of the captured fish and preparation technique used. They will have been pertinent, to a large extent to the fishing grounds and size of the fish species targeted. Likewise, the processing of the prepared fish, for example from headed and gutted (H&G) format into fillets and portions, or for salting, will have generated further conversion factors, dependent on the processing techniques used and final form of the fillets and portions.

There have been very significant changes in the sourcing of white fish over the 19 years of publication and more importantly, in the methods and locations of processing into fillets and portions. As a result, many of the official conversion factors in use no longer accurately reflect the reality.

Taking cod as an example, capture has very much moved towards the Russian, Norwegian, Icelandic and Polish fleets, whilst Pacific cod from the USA and Russian fleets has grown in importance as alternative supply sources.

Likewise, final processing of frozen H&G cod into filets and portions is now largely carried out in S.E. Asia, predominantly, in China. It is this final processing where the greatest changes in yield have occurred and hence in the conversion factors to be applied.

In Europe, frozen H&G cod is typically fully defrosted and processed via Baader type equipment, followed by 'V' cutting to remove pin bones. The 'V' cut fish is then recovered mechanically to generate mince that is typically made into blocks.

This can be contrasted with China, where the H&G cod is hand filleted in a semi-frozen state, when the pin bones are carefully removed, again by hand, so that there is very little wastage of prime fish or generation of lower value mince.

3.2 Impacts of Variable Conversion Factors on Apparent Volumes of Live Weight Fish Processed

As indicated above, there are significant differences in the official conversion factors used by EU member states and third countries for calculating live weight from both fresh landed and H&G fish. These differences are listed in Table 4.16 in the tables section, but examples are illustrated below to show the impact on apparent live weight of fish caught based on 1,000 tons H&G cod landed.

	Conversion Factor	Frozen H&G Cod Tons	Live Weight Equivalent Tons (WFE)
Belgium	1.5	1,000	1,500
France	1.38	1,000	1,380
Germany	1.71	1,000	1,710
Norway	1.5	1,000	1,500
Poland	1.64	1,000	1,640
Portugal	1.4	1,000	1,400
Russia	1.5	1,000	1,500
EU Proposed	1.4	1,000	1,400

*From FAO Handbook, Circular No 847, rev. 1

Taking the extremes of the above factors, it is evident that for every 1,000 tons of H&G cod, the back calculation of the live weight of cod from which it was derived could vary by up to 330 tons.

The EU Commission, DG Mare member state Fisheries Management Committee began a harmonisation process during 2007 to try to reconcile these different factors and new regulations come into effect on first January 2010 for landings of fresh fish into the EU. The regulation proposal of 1.4 for an H&G cod factor is maybe slightly too low, but for the purposes of AIPCE/CEP calculations, bearing in mind that Russia and Norway are the principle suppliers, all calculations have now been based on a 1.5 factor for the 2008 and 2009 reports, instead of the German 1.71 factor used previously. This has been retrospectively applied to previous years, so that live cod utilisation will be lower than shown in earlier reports. This 1.5 factor now applied translates to an H&G yield of 66.7 % and a difference of 210 tons of live cod weight equivalent for every 1,000 tons of H&G utilised, Note that no attempt has been made to modify the official EU landed statistics for fresh fish landed in the EU, so only import statistics are altered in this process.

As already discussed, the major movement of the primary processing of H&G fish into fillets and portions has been from Europe to China over recent years. This has led to very significant yield improvements of fillet type products, hence the need to make a change to the conversion factors.

The German official conversion factor from skinless cod fillets to whole fish is 2.95, which translates to an overall 33.4 % yield. However, there is also a 5 % arising of cod mince in addition to the fillet meaning an overall yield of 38.4 %.

In China, a typical yield of skinless fillets from H&G cod is up to 70 %, but a value of 68.2 % has been used for the purposes of these calculations, translating to a conversion factor of 2.2 back to live fish weight equivalent. As also explained above, there is no arising of mince, but there will be a small arising of trimmings that would be utilised elsewhere.

Overall yield in China from live weight equivalent of cod can therefore be assumed to be 45.5 %. When compared to mechanically processing fish in Europe, this is an overall gain of 7 % based on the live weight equivalent of cod. Another way to express this would be 18 % efficiency and yield improvement. Additionally, the overall potential commercial value of the derived products is higher because more fillet products will be generated without an arising of lower value mince.

The suggested yield of 45.5 % is probably on the conservative side; since one large integrated company in China is claiming that they can achieve a 50 % overall yield from their fish. However, this may well include by-product recovery as well.

Clearly, applying the more appropriate cod factor for imported fillets from China has a very significant impact on the apparent amount of live cod being utilised.

Interestingly, increased factors result for Alaska pollock, where the USA and Russia process fresh fish mechanically into fillets and mince or surimi-base material on board their integrated factory vessels. However, in China, a significantly reduced factor is calculated for hand processing block frozen H&G, which is largely derived from Russian caught fish. An increased calculated usage of live weight fish therefore results for American and Russian processed A. pollock, but reduced usage for Chinese

processed fish. In terms of EU import statistics for previous years; this translates into very little overall change because the increase in live weight equivalent usage in the USA and Russia is offset by the yield improvements in China.

Some of the factors now applied are as outlined below (also see table 4.15):

Species	Product Type	Original Factor	New Factor
Cod	H&G	1.71	1.50
Cod	Frozen fillet	2.95	2.20
Cod	Fresh fillet	3.48	2.90
A. pollock	H&G	1.51	1.70
A. pollock	Frozen fillet (USA)	2.95	3.70
A. Pollock	Frozen fillet (Russia)	2.95	3.70
A. Pollock	Frozen fillet (China)	2.95	2.38
Salmon	Frozen fillets	2.50	2.27

3.3 Justification for Use of New Conversion Factors in the Report

Obviously there is always a reluctance to alter a long running statistical appraisal, but as an example from the 2007 report, the back-calculated volumes of whole cod utilised in 2005 and 2006 were 1,116 and 1,113 million tons. These volumes were considerably above all internationally calculated legal quotas and were set against a background where it was clearly evident that the actions being taken to reduce or eliminate IUU cod were having a positive impact.

The official German factor for H&G cod was on the high side of those typically applied across Europe, but Germany, the instigator of the Whitefish Study, was also a significant cod fishing nation at the time. Now that so little cod is processed in Europe, it is no longer necessary to attempt to apply proportionate yields between European and Chinese processed fish. Accordingly, the revised factors have been applied for imported fish as discussed above.

This detailed explanation of changes made to the back-calculations of live fish equivalent translates into an apparent 48,000 tons less utilisation of live cod in 2006. However, for the other significant imported species, Alaska pollock, whilst a reduced factor has been applied to Chinese processed fish, an increased factor has been applied to USA and Russian processed fish, where one balanced out the other.

The overall cod usage calculated represents a 5 % reduction in apparent IUU fish.

4. Supply Trends

This section provides an appraisal of the total fish supply and highlights the relative dependence on imports. (The next chapter details EU national quotas and catches).

The AIPCE Whitefish Study has traditionally reflected the proportional dependence of the EU total supply base on imported fish of all types, which is discussed below in 4.1.

Over the past 3 years, the scope of the report has been expanded to include salmon species, freshwater white fish species, surimi and now tuna this year for the first time.

All of the import data, origin and degree of semi processing of imports can be found in tables 4.1 to 4.15, but key features are discussed below.

4.1 Total Fish Supply (all species)

From Table 4.1, which is expressed graphically in Fig. 4.1 A below, the total seafood supply, including EU landings and aquaculture products for human consumption plus imports has been relatively stable in the EU 27 over the past 3 years, peaking at 14.87 million tons in 2007, but decreasing slightly to 14.56 million tons in 2008. This comprised of 9.42 million tons of imports and 5.134 million tons of national landings and aquaculture products. Hence the relative food balance between the EU origin fish supply and imports indicates that the EU was dependent on imports to the extent of 65 % in 2008. However, current estimates are that for 2009, volumes will rise slightly again up to 14.80 million tons.

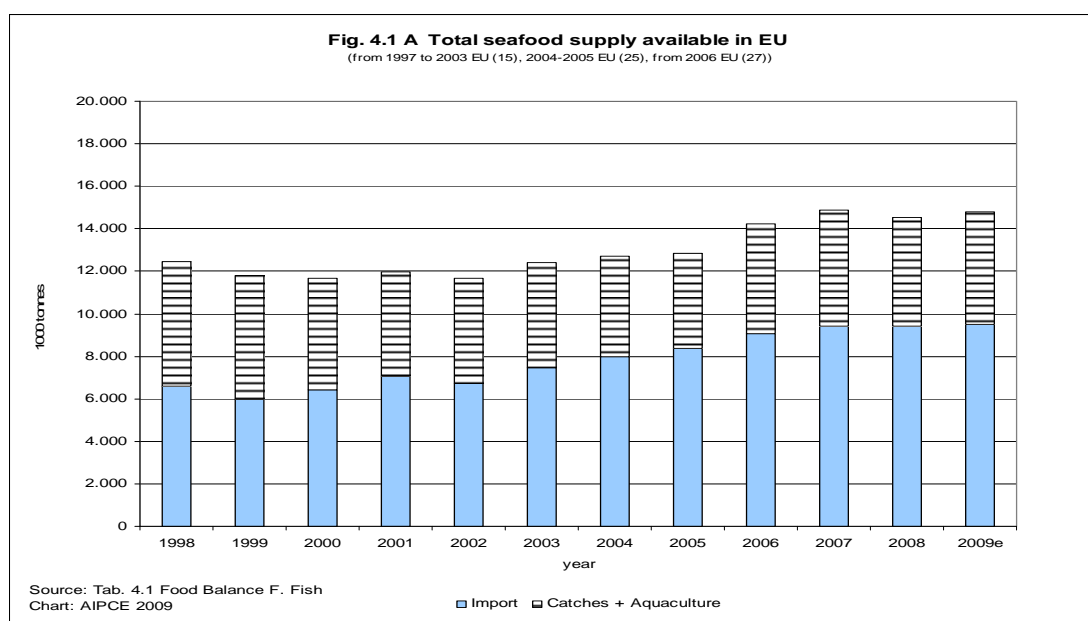
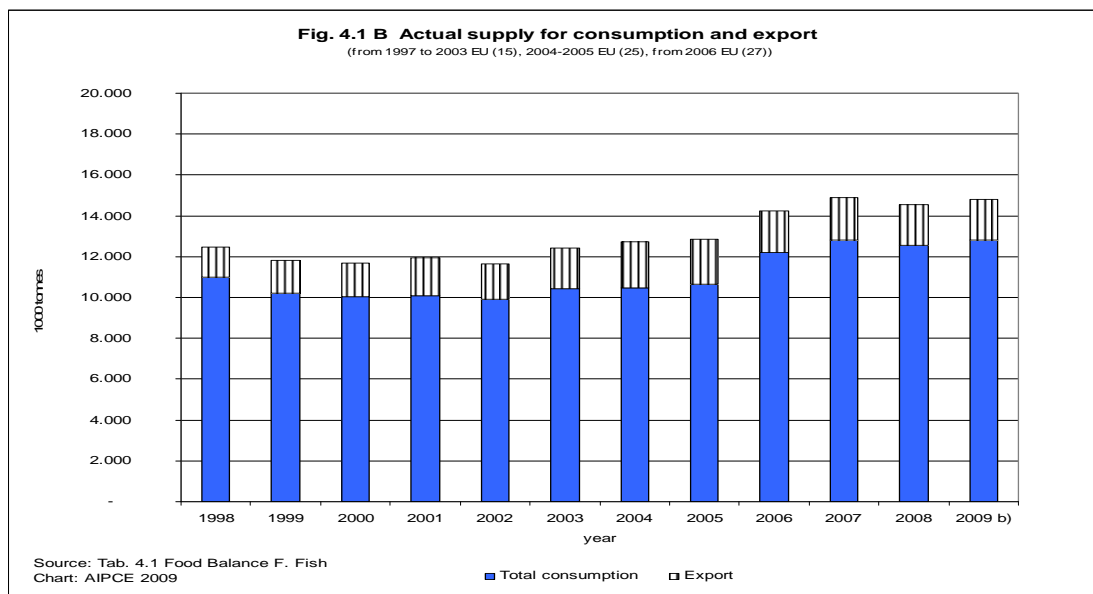
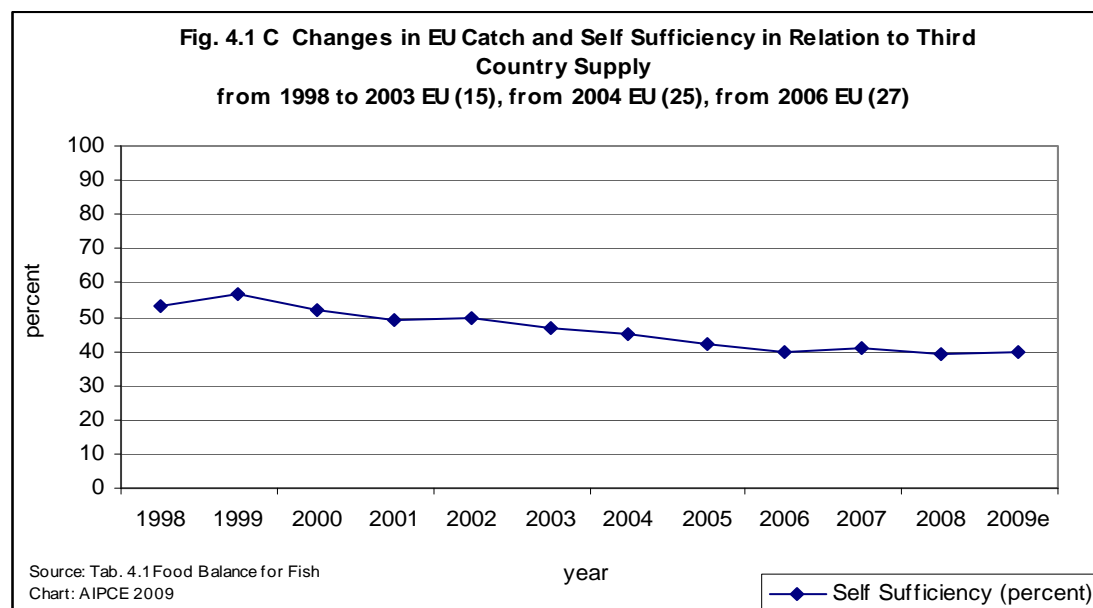


Fig 4.1 B (see next page) illustrates total fish for consumption within the EU, after deduction of exports. This fell slightly to 12.55 million tons in 2008.

Whilst there is a relatively steady state of available fish for consumption across the EU 27, it is interesting that the last consumption rate against population calculated for the EU 15 in 2003 was 27.2 kg/caput, falling to 23.1 for the EU 25 in 2005, but rising to 25.6 across the EU 27. Clearly these figures hide significant differences in consumption rates across the member states.



An alternative way of expressing the EU dependency on imports is to express it in terms of self-sufficiency, where it is assumed that all fish caught in the EU is utilised within the EU, so there would be no exports. From Fig. 4.1 C, it can be seen that self-sufficiency has declined to 41 %.



4.2 Total White Fish Supply

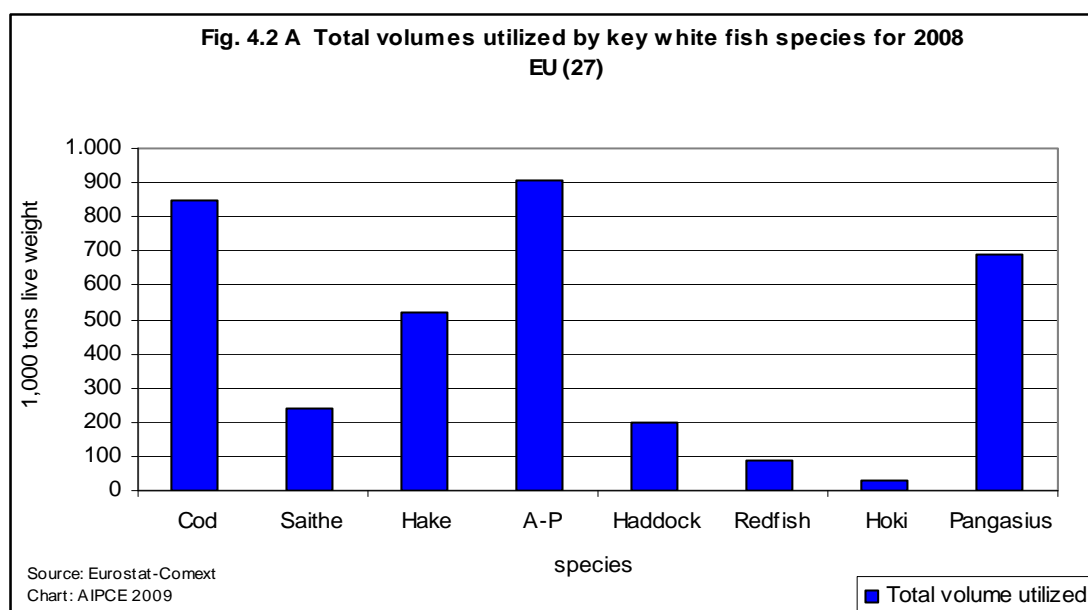
Whilst the overall fishery product supply base is reliant on imports to a level of 65 %; marine white fish dependency remains much higher at 90 % for 2008, as indicated in Table 4.2 in the tables section.

Overall, the total supply volumes of marine white fish decreased slightly for the third successive year to 2.84 million tons, which is 100 thousand tons less for the EU 27 in 2008 than for the EU 25 in 2004. Cod was usurped by Alaska pollock in 2008 as the principle whitefish species. Cod volumes declined from 945 to 849 thousand tons, which although including a 13 thousand ton fall in EU catch, reflected mainly in import volumes. High prices earlier on and adverse consumer reaction to cod on sustainability and environmental grounds are principle reasons for this decline.

Reductions in cod volumes may be viewed negatively, but behind this lies a potentially positive situation. Declines no doubt in part reflect the significant efforts to bring the Barents Sea fishery under effective management control. In some key cod fisheries rises in the water temperature are anticipated to result in larger quotas in the short and medium term with double digit increases in quota for 2008 and 2009. The outlook for the eastern Baltic cod is also very positive with significant quota increases proposed for 2010.

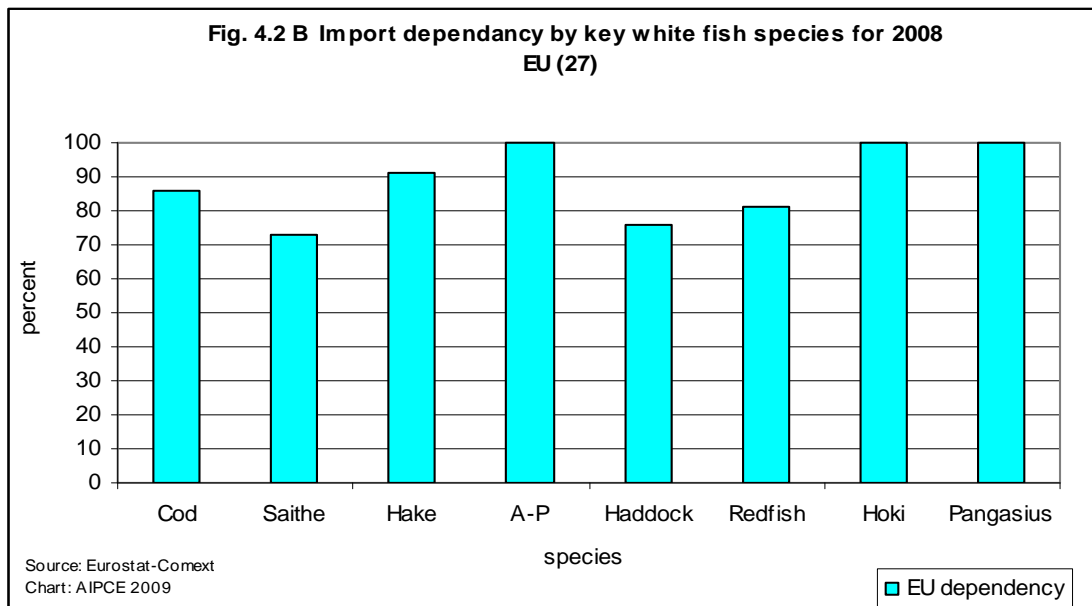
Alaska pollock import volumes have risen steadily over recent years and from 746 in 2004 to 906 thousand tons in 2008 even though the US quota reduced from 1.5 million tons to less than 1 million tons over the same period. The Eastern Russian A. pollock sector quota is faring better in the Sea of Okhotsk, but as with the USA, this is being offset by more difficult conditions in the Bering Sea.

All other important white fish supplies, including saithe, hake, haddock, Atlantic redfish and hoki showed little change in supply over 2007 and are shown by volume. As will be discussed later, the development of aquaculture, in particular pangasius from Vietnam, is helping to offset gaps that have occurred and will continue to occur in whitefish supply and will support the underlying growth for seafood consumption in Europe.



Figs 4.2 A above illustrates the total whole weight volumes of the key white fish species utilised in 2008.

Overall percentage reliance on imports for these key white fish species is shown in Fig 4.2 B below.

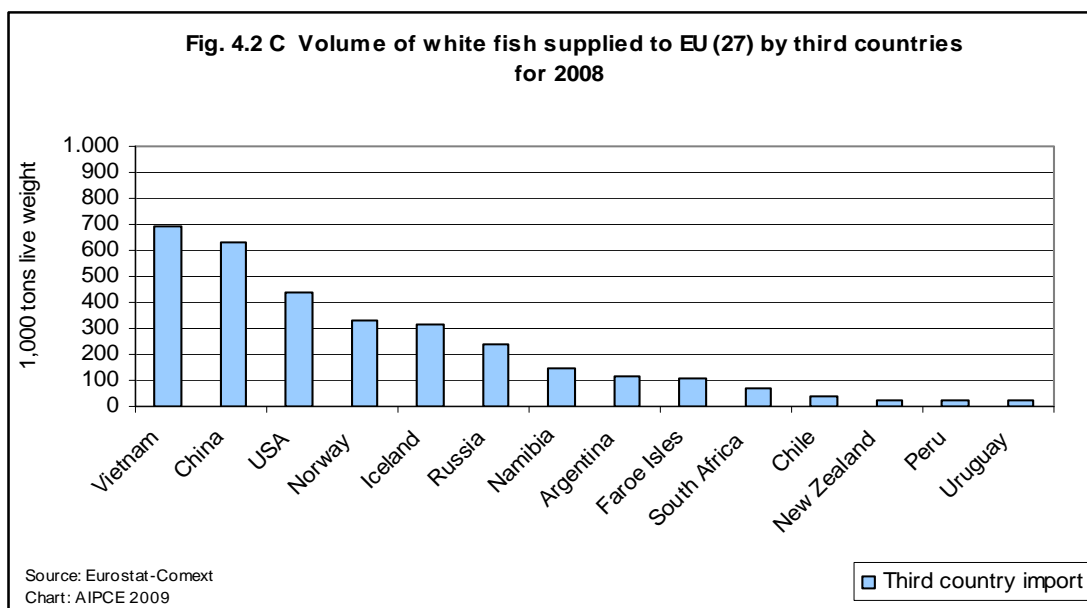


4.2.1 Principle Supplying Third Countries

Table 4.3 provides an analysis of the third countries supplying the EU with white fish in its various presentation formats of fresh, frozen, whole fillet, meat etcetera. The subsequent Tables to 4.4 to 4.14 provide a detailed breakdown by species.

From the analysis in Table 4.3, the Fig 4.2 C indicates the volumes supplied by each third country. Once again, China is the clear leader, but due to the re-appraisal of conversion factors, as of 2007, the USA featured ahead of Iceland and Norway as the second most important supplying country.

China's volume increased significantly by 9 % in 2008 to 626.5 thousand tons, which seems to reflect volume declines of whole frozen fish from Russia into the EU and frozen fillets out of Iceland and New Zealand. No doubt China is carrying out more added value processing for these countries. There was a change in place between Iceland and Norway as a consequence. Argentina also dropped one down the list as the supply of frozen hake fillets also continued the significant year on year decrease.



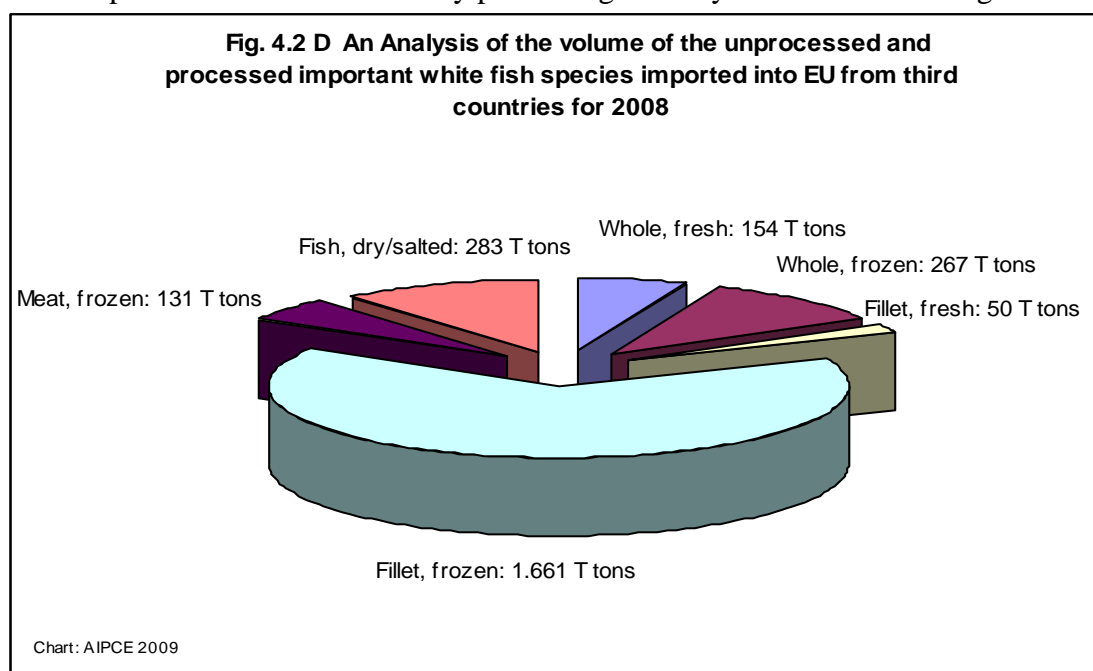
Under China's Customs and tariffs systems, all primary processing undertaken on imported and subsequently re-exported fishery products, results in a reclassification of these to Chinese origin. However, since virtually all of the processed white fish from China is supplied by other third countries, Table 4.3 does not reflect catch and country source, but final primary processing source. Obviously, since Russia supplies a very significant amount of the cod from the Barents Sea, as well as Alaska pollock and salmon from the Pacific that is processed in China, then Russia would rise close to the top of the supplying countries if originating source was being reflected. Norway also supplies cod, haddock, redfish, saithe and Greenland halibut to China for processing. Whilst Iceland also sends similar species to China, this country is a major supplier of cod to the southern European salt fish processing industry, as well as supplying large quantities of both fresh and frozen product into Europe. The USA processes the vast majority of its Alaska pollock domestically on board its factory vessel fleet and in shore based plants but it is a major supplier to China of Pacific cod and Pacific salmon species.

Concerns have been raised within the NGO communities over the role of some aspects of the activities of the Chinese fishing fleet with respect to IUU fishing in the southern oceans and the African coast. Whether this is a major issue or not has nothing to do with the processing of white fish as is covered by this study of EU imports, other than by national associations. This white fish has its catch origins in quite different international regions and is predominantly caught by vessels flagged to other countries.

Traceability of any fish source is essential, however and this has to be from catch to factory carrying out any semi-processing operation onto the final processor and added value product. Whilst AIPCE/CEP members have traceability systems already in place, the introduction of the EC IUU regulations in 2010 will bring similar systems into place for all importers.

4.2.2 Importance of Semi-Prepared Fish Imports

Based on Table 4.3, the ever-growing importance of semi-prepared processed fish for the European value added secondary processing industry could be seen in Fig. 4.2 D.



Whilst there was an overall slight decrease in imports of 3 %, whole fish imports, both fresh and frozen, continued the steady decline by a further 3 % and 6 % respectively in 2008 compared to 2007. To some extent, this reflects the declining primary processing facilities within the EU, as national white fish landings also decline.

Interestingly, after remaining high and steady for several years, the import of fresh fillets from Norway, Iceland and Faeroes also showed significant declines by 18 % to 49.8 thousand tons overall. This no doubt reflected the economic climate and the earlier imposition of minimum import prices from Norway. The frozen market has experienced a significant return to growth in some EU member state countries in 2008.

Whilst China dominated the frozen fillet import at 605,483 tons whole fish equivalent, the USA was second with 342,151 tons, followed by Iceland, Russia, Namibia and Argentina, all with between 135,000 and 84,000 tons each. That Norway only supplied some 55,000 tons of fillet, based on whole fish equivalent, reflects the importance of China as a primary processing country, as discussed above.

China's two principle fillet species were A. pollock at 406 thousand tons and cod at 125,587 tons, whilst the USA was essentially Alaska pollock at 313 thousand tons with 30,000 tons hake, Russia was Alaska pollock at 128 thousand tons plus cod and haddock fillets, with Argentina, Namibia and S.Africa as hake.

4.3 Total Supply of Surimi

Surimi was included into the Whitefish Study for the first time in 2008 since it is an important fish supply source and so should be covered. It should be understood that surimi is not a product preparation for direct consumption.

Surimi is the insoluble minced fish protein derived from a number of species by a multiple washing and separation process. The resulting preparation is typically distributed in frozen block form. It is used as the base for further added value product preparations, but can also be as a protein enhancer in meat products. However, it is predominantly for surimi preparations such as crab flavoured seafood sticks and similar analogues.

From Table 4.14, it can be seen that there had been a steady rise in imports of surimi over the previous 3 years to 189,038 tons of whole fish equivalent in 2007, declining slightly to 184,749 tons in 2008.

The most frequently used species for surimi for the European market used to be white fish, such as Alaska pollock, but as flesh separation techniques have improved, substitution with alternative tropical and pelagic species has occurred. For instance, in China it is believed that most surimi is generated from red threadfin bream, which globally is one of the higher volume caught species, whilst in Chile it will be from pelagic species. Here in European waters, the pelagic blue whiting was a common source of raw material for national production, but recent quota cuts have been responsible for the rapid decline of the Faeroes as a surimi-base supplier.

There are particularly important processing companies converting imported and nationally derived surimi-base material into surimi preparations in member state countries such as France, Lithuania and Poland.

Almost 185,000 tons of whole fish equivalent of surimi is imported into the EU. The USA dominates with 80 thousand tons. In 2007, Chile followed at 51,000 tons, but this volume halved in 2008 to 25,000 tons. However, Vietnam increased its exports to the EU by 30,000 tons to 52,000 tons. Thailand, Malaysia and Peru, in descending order are the other principle suppliers. From the earlier species utilisation explanation, it can be assumed that the USA fish source will be Alaska pollock, Chile and Peru pelagic mackerel/sardine types and Vietnam local tropical fish species.

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.

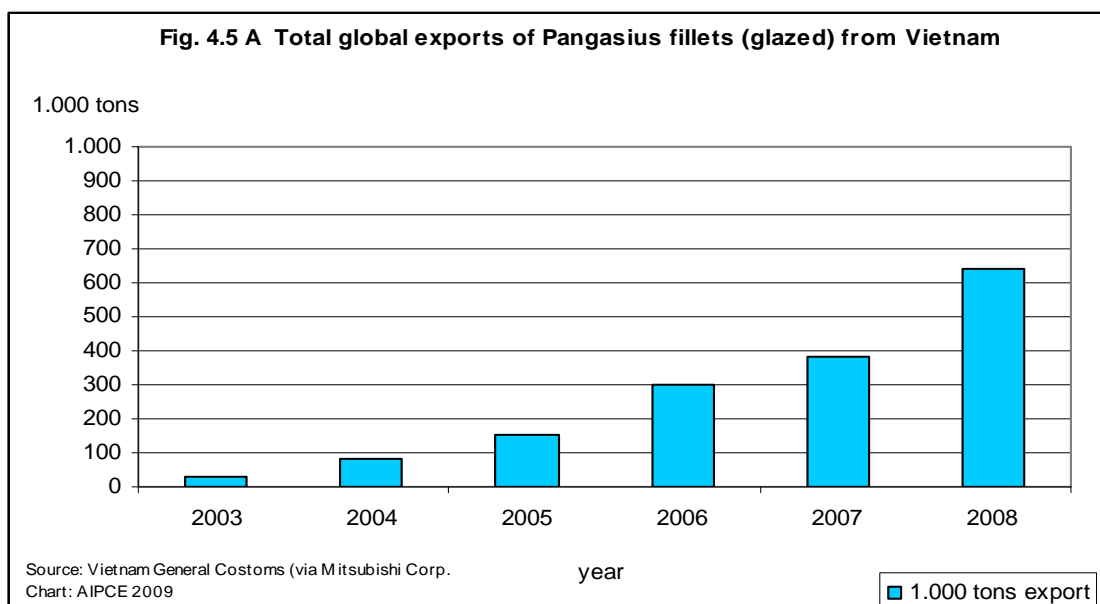
Imports had been rising slightly, but declined by 6 % to 212,000 tons of whole fish equivalent of fish. Here, it is the low cost producers who can overcome barrier tariff duties, whilst still remaining competitive, that dominate the market. China leads this market supply with 81 thousand tons, being closely followed by Thailand at 73 thousand tons and then India at 33 thousand tons.

4.5 Total Supply of Freshwater Fish

Freshwater species are not sub-divided in Eurostat, but total imports can be seen in Table 4.13.

The growing importance to the processing industry of alternative species to marine white fish species was highlighted for the first time in the 2007 report. These are predominantly aquaculture sourced.

Pangasius is the most significant of these aquaculture species, which was a relatively small scale Mekong caged river grown aquaculture species, but is now raised in pond-based operations alongside the river. The supply was described as growing exponentially in our 2008 report and this has continued with a 30 % year on year growth, as can be seen in Fig. 4.5 A (which is based on figures from the Vietnam General Dept. of Customs, courtesy Mitsubishi Corporation).



The total global export volume from Vietnam for ready prepared fillets, with protective glaze, for 2008 is quoted at 640 thousand tons, estimated to be 1.45 million tons whole fish equivalent. Of this total volume, 224 thousand tons of glazed fillets, which is approximately 688 thousand tons whole fish equivalent (WFE), were exported to the EU. This exceeds the third most important imported marine white fish species, hake. The Netherlands is a principle receiving destination into Europe and whilst Poland and Spain appear to be the 2 largest consumers of the species, it has become very popular across the whole of the EU.

In 2007, the EU accounted for 40 % of the pangasius production, but this decreased to 35 % in 2008 against a significantly increased production. This reflects the growing demand for the species in the rest of the world.

Significant quantities of the freshwater white fish species are sold into the food service and retail sectors as fillet products for direct marketing. These species, whilst dominated by pangasius, include significant quantities of Nile perch and tilapia.

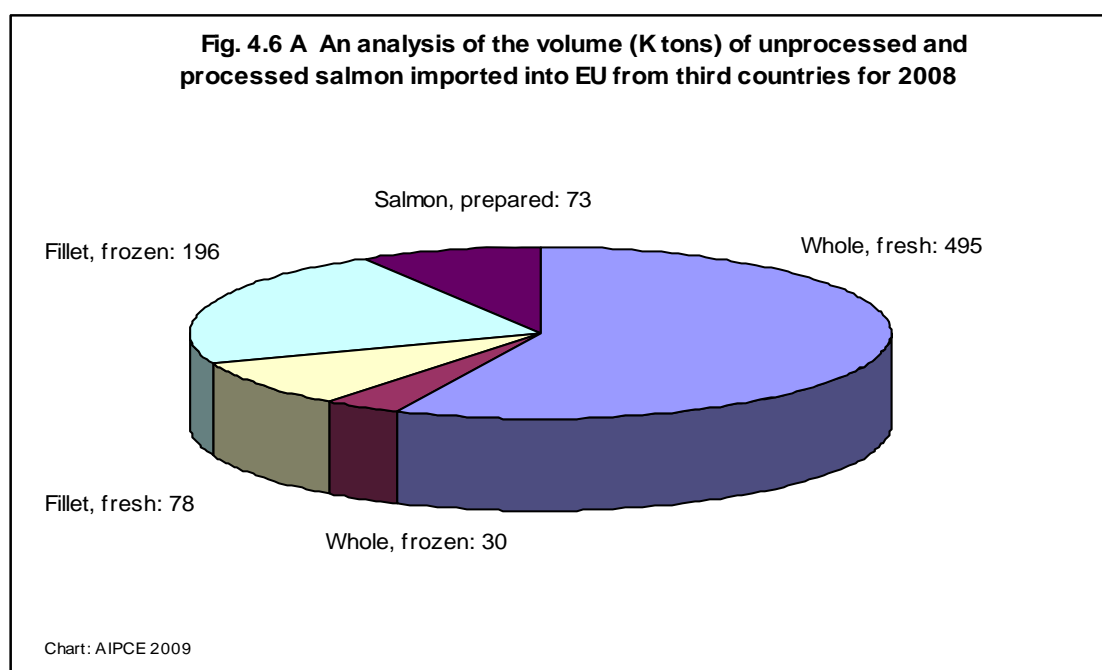
Whilst AIPCE-CEP members will be involved in this supply chain, pangasius has also become a very important species for use in secondary processing within the EU for added value products.

From Table 4.13, total whole fish equivalent imports for fresh water species rose by 20 % in 2008 to 896 thousand tons. Of this, 688 thousand tons was accounted for by frozen pangasius fillets from Vietnam, representing almost 78 % of all freshwater imports. Pangasius imports rose by 34 % over the previous year, significantly contributing to overall growth of this sector. Nile perch, principally as fresh fillet imports, from Tanzania and Uganda accounted for almost 11 % of the remaining volume. Tilapia is the third most important species, principally from China, Indonesia and Bangladesh.

4.6 Total Supply of Salmon

Whilst salmon is not a white fish species, as availability has increased and prices have fallen/stabilized at lower levels over the years, there has been an appreciable level of competition to white fish from salmon.

Table 4.12 and Fig. 4.6 A indicate an overall year on year increase in imports based on whole fish weight equivalent to 794,880 tons of all salmon species for 2008, an increase of 5 % on 2007. To this has to be added the 190,000 tons of production within the EU, principally from Scotland. So the total available volume of all salmon species in the EU is now approaching 1 million tons and now exceeds that of either Alaska pollock or cod volumes.



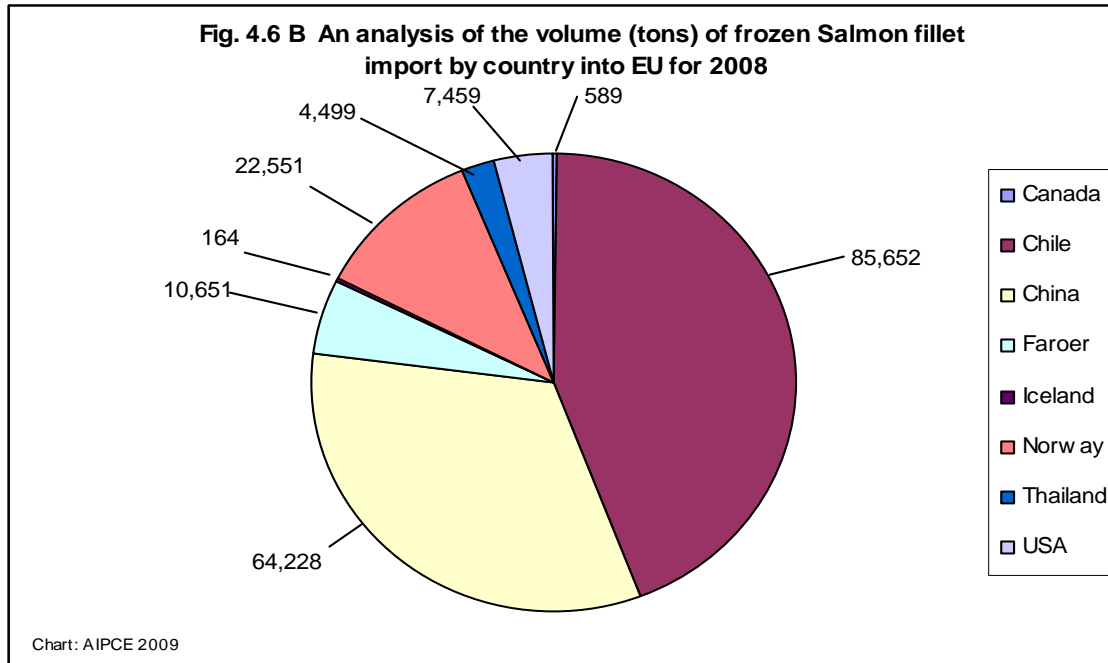
Norway dominates imports of both whole salmon fresh at 471,000 tons, being 95 % of the total and fresh fillets at 76,285 tons, or 97 % of the totals into the EU.

However, the position is quite different for frozen whole salmon, fillet and frozen prepared salmon products. For frozen fillets, as can be seen in Table 4.12 and Fig. 4.6 B, Chile still dominates at 85,652 tons whole weight equivalent, having dropped by 1 % from the previous year, but China rose by 4 % to 64,228 tons whole weight equivalents, followed by Norway at 22,551 tons and the USA at 7,459 tons and Thailand 4,499 tons.

Whilst Chile was able to take advantage of the confusion that reined during the EU imposition of salmon import safeguard measures, more recent disease problems have caused an export slow down and this will become more apparent in the coming years. Imports of salmon fillets from Chile have fluctuated from 48,367 tons in 2004, to a high of 103,340 tons in 2005.

Import of salmon fillets from China at tons equivalent whole fish, will also include a significant proportion of wild Alaska Pacific salmon species. Whilst Russia does not appear as a supplier of Pacific salmon, it is known that China processes Russian origin Pacific salmon.

Since wild Alaska salmon was MSC certified, an EU market for ecolabelled salmon has developed, so that in addition to the whole fish equivalent of 19,875 tons of frozen tons of whole salmon, 7,459 tons fillets and 42,872 tons preparations imported from the USA can be added a significant proportion of the 64,228 tons of frozen salmon fillets originating from China, probably putting the USA second to Norway overall, with Chile third.



Wild Alaska Salmon Processing China, courtesy Trident Seafood's USA

4.7 Total Supply of Tuna

Tuna has been included into this report for the first time this year and the volume statistics can be seen in table 4.15. Many AIPCE/CEP members process tuna either within member state territories, or more often in third countries, where they have invested in processing facilities, often via local partnership agreements.

Tuna catches and import supplies amount to over 1.75 million tons and therefore constitute a similar volume of fish to all the cod and Alaska pollock consumed in the EU. This is supplied predominantly in canned form. However, a valuable trade has also developed in fresh and frozen tuna loins in some EU countries including France and the UK. This is derived from yellow-fin tuna, principally from Sri Lanka and Indonesia.

5. EU Supply Base

5.1 EU Quota by Species

Reference Table 5.1 in tables section:

Of the 5 white fish species important to AIPCE/CEP that are caught within EU waters (cod, haddock, hake, saithe and Atlantic redfish), the overall annual drop in cumulative quota continued yet again in 2008. This time, it was only by only 1.1 % giving a total potential catch cumulative quota for the year of 390,585 tons. On a positive note, saithe and hake experienced a quota rises of 6.6 % and 6.8 % respectively. However, the steady reduction in cod quota continued by 2.2 % and Atlantic redfish quota fell by 7 %. The significant increase in haddock quota seen the previous year was lost, with an 11.5 % decline to its lowest quota volume for many years. This is counter to increases in quota across much of the rest of the north Atlantic.

5.2 EU Catches by Quota Species

Reference Table 5.2 in tables section:

Taking the 5 important whitefish species important to AIPCE/CEP and comparing actual landed cumulative catch weights of 292,544 tons against potential catch quota of 390,585 tons, this represents a lost commercial opportunity of 25 % of quota.

Atlantic redfish landings, at 17,071 tons were only 53 % of quota, whilst at the other end of the spectrum; 117,396 tons of cod were landed, representing 92.3 % of quota.

No doubt there are a number of reasons why catch quotas are not achieved, including price realisation, but the impacts of the cod recovery plan, for example and general effort restrictions are bound to play an important part in reducing overall catch efficiency. Whilst cod is no longer targeted as a primary species by elements of the fleet, cod avoidance will also have a significant impact. On the other hand, the estimated discard volumes of cod and many other species are extremely concerning.

Obviously, whilst fishermen will be gravely concerned about the mismatch between quota and landings, such disparities and low landings make business planning by processors very difficult indeed. In fact, low daily landing volumes and irregularity of

supply mean that much of the fish can no longer be utilised into the major processing streams.

6. Carbon Footprint

There has been yet more concern voiced with respect to shipping frozen fish to S.E. Asia for primary processing and returning to Europe for final value added processing. In the previous year's reports, reference was made to the new super container vessels with up to 16,000 container unit capacities and how these now burn cleaner fuels more efficiently. It was suggested that whilst being counter-intuitive, hand processing fish in China, with the increased yields and quality advantages could well off set the food miles concerns. Independent studies recently undertaken by Seafish in the UK have confirmed this view and have demonstrated that the shipping element is actually a small proportion of the overall energy input into the fishing and processing cycle. A new addition to the website will also be a carbon dioxide calculator by species. Reference www.seafish.org. It should be noted however, that carbon dioxide calculators cannot be applied generically and need to be applied to specific supply chains according to catching methods for the fish, processing and supply chain.



Primary Processing White Fish China

7. Illegal, Unreported and Unregulated Fish, Confidence in the Supply Chain, the DG Mare IUU Regulations and the Control Regulations

7.1 IUU regulations

October 2007 saw the publication of the EU consultation on a 'Proposal for a Council Regulation to deter and eliminate illegal unreported and unregulated fishing'. Whilst the proposal was aimed at both national and international supply, the emphasis moved towards third country fishing vessels landing at EU designated ports, but with particular emphasis on the potential for IUU fish being included in the imported fish. At the heart of the proposal was a requirement for all fish to be linked to a catch certificate verified by the flag state of the fishing vessel. Further there had to be an unbroken traceability confirmation for all fish that had to be verified by competent authorities in all third countries through which the fish passed or in which it was processed.

Through effective lobbying by AIPCE/CEP and its partner organisations in member states, several key amendments have been incorporated that have produced a more workable final proposal that has retained the full intent of the regulation. The final version was agreed by the EU Council on 23rd June 2008, coming into effect on 1st January 2010.

However, implementing regulations are required to effect the IUU regulations and as of September 2009, the draft of these was still under review for finalisation and the anticipated guidance notes were still awaited.

With only 3 months to introduction of the regulations, AIPCE/CEP is becoming increasingly concerned that there will not be a smooth introduction, which could seriously impact available supplies for processors.

DG Mare has undertaken a well-attended series of workshops around the world and has had bilateral discussions with major exporting countries. However, at ground level, AIPCE/CEP is becoming increasingly aware that both the exporters and authorities are still unsure about the due procedures to be adopted.

AIPCE/CEP is also concerned that at member state level, there is still a lack of clarity as to which particular authorities will carry out checks at border inspection posts. Some countries seem to be more advanced than others in this, but even so, it can be anticipated that there will be many issues still left unresolved by 1st January 2010.

AIPCE/CEP therefore calls for a degree of pragmatism to be exercised by authorities in the first few months of 2010.

Recalling the introduction of the EC Hygiene Regulations, a three-tier categorisation of exporting countries to the EU was introduced, according to their ability to fully comply with the regulations and completion of compliance documentation. Perhaps a similar approach could be adopted for the IUU regulation.



7.2 Control Regulation

The proposed control regulations, also coming into effect on 1st January 2010, which are for EU national compliance, have been progressed to an even more ambitious timetable than that for the IUU regulations. There are concerns over implementation by January being expressed by EU fishermen's organisations. Whilst AIPCE/CEP accepts the need for both to be introduced to the same timetable, there is grave concern over the impact of traceability and labelling proposals within this regulation. The wording appears to go beyond that in other hygiene and traceability regulations, which should take precedence. This has the potential to create significant legal confusion and it is questioned whether such requirements should be included in a fishing control regulation at this stage.

7.3 IUU Comment

In previous Whitefish Studies, the implementation of the AIPCE 'Purchase Control Documents' was explained. These were adopted to ensure that IUU white fish from the Barents Sea and also the eastern Baltic Sea was avoided.

At the Brussels Seafood Show in April 2008, WWF International recognised the good work by NEAFC, Norwegian Government, Russian Government, DG Mare and AIPCE in reducing the estimated IUU cod catch in the Barents Sea from as estimated 160,000 tons to 40,000 tons in 2007. It has been estimated that IUU cod could well be less than 15,000 tons for 2008 which has full year on NEAFC implementation.

In 3.2 above it was explained how the cod utilisation figures had been recalculated and reduced by approximately 48,000 tons of whole fish equivalent. It is interesting that based on these recalculated tonnages; third country imports of cod were 919,000 tons in 2003 and 836,000 tons in 2008. This supports AIPCE views that the steps being taken to control IUU are effective.

Some major companies within AIPCE/CEP member organisations had been contemplating withdrawing from the eastern Baltic cod fishery because of the ongoing IUU issues. However, by exercising strict purchasing control and exerting political influence, it is tremendously satisfying to note that the Danish part of the fishery has entered MSC assessment in 2009 and that quotas will increase in 2010.

AIPCE/CEP intends to continue working towards reducing IUU wherever it arises and feels sure that the new IUU regulations will be effective. However, they stress that the current DG Mare and member state implementation team should strive to ensure workable solutions.

8. Ecolabelling, EU Proposals and MSC Developments

Following the activities on ecolabelling in 2005/6 by DG Fish and the Parliament, there was very little progress during 2007, but DG Mare (Fish) reopened the dossier during the first half of 2008. It will be recalled that initially DG Fish had suggested three options: 1. Do nothing and let the existing market develop, 2. Develop an EU standard and 3. Develop minimum standards to which private schemes must comply.

AIPCE/CEP view was that the third option was most favoured, since several ecolabelling standards already exist, many more are in development and at least one group, the MSC, assert they meet the FAO ecolabelling guidelines and are well established.

DG Mare proposals would logically have to meet the FAO guidelines as a minimum standard, since DG Mare had been an active member of the FAO developing group.

DG Mare latest proposals are to develop minimum standards for ecolabelling in partnership with sector groups within the fishing industry. AIPCE/CEP has been involved in exploratory discussions and a new proposal is expected to be available by November 2009. This being described as 'ecolabelling plus' and will probably include other aspects than fish stock sustainability and traceability.

This is an interesting concept, but the number of international fisheries that have met MSC standards and certification has grown enormously over the past two years, with many European retailers and brand owners now committed to this ecolabel.

There is evidence that consumers are becoming confused with the plethora of labels already on the market across the food industry as a whole, so it will be interesting to note how this new initiative will develop.

9. Import Tariffs

The current legislation, Council Regulation EC No. 824/2007, covering autonomous tariff quotas ATQs for certain fishery products for the period 2007-2009 is now coming towards completion.

During the current period, there have been a number of products where imports have, of necessity, consistently exceeded the volumes of the tariff relief quota, but DG Mare

has been reluctant to open further discussions. This has added cost to the processing industry without there being any benefit to the EU fishing community.

Discussions have been completed between AIPCE/CEP and DG Mare for the next 3-year period, 2010-2012 and the AIPCE common proposal has been submitted. Where there has not been complete agreement at AIPCE, further proposals have been put forward at member state level.

The proposals have also been discussed at the ACFA (Advisory Committee on Aquaculture and Fisheries) where, as might be predicted at a time of global economic turn down and low profitability across all sectors, questions have been asked about reduced tariffs and increased volumes for concession.

The final ATQ proposals are eagerly anticipated by AIPCE/CEP and it hopes that the final agreements are in place in prior to the first January 2010.

Additionally, the over-arching legislation covering import tariffs, the Common Market Organisation for Fisheries, Council Regulation (EC) No. 104/2000 is currently undergoing a full review by DG Mare. AIPCE is actively participating in the review and potential reform discussions. A key area for debate will have to include the most appropriate way to handle both tariff suspensions and the recurring 3-year tariff quota discussions and agreements. There may well be a case to consider independent legislation from the CMO to handle these trade matters in order to avoid the ongoing implementation delays and difficulties experienced in the current review process.

10. Background to Challenges Concerning the Integrity of the Import Supply Base

An explanation of the recent challenges concerning the integrity of fishery product imports raised by sectors of the EU seafood and aquaculture is explored in this section. It is considered further in terms of labelling and supply costs for the EU added value industry in sections 12 and 13.

The EU catching sector and aquaculture organisations are experiencing rapidly rising operating costs, due mainly to rises in fuel and feed prices respectively. This is at a time when their selling prices are said to have either stagnated or are falling. They are suggesting that the problems of low price realisation can be linked to lower prices and quality (both organoleptic and nutritional) of imports when compared to EU nationally caught fish.

Consequently, there are proposals that DG MARE completes its review of the Common Marketing Organisation for Fishery Products as quickly as possible and that it then reviews tariff structures and rates for imports along with potential aid for the EU fleet.

The CMO review is now expected to be completed and recommendations implemented in line with the timetable for reform of the CFP by 2013. However, preliminary reports on the CMO progress recognise both the need for continued support for the processing sector through provision of imports and the need to aid market development of the fishing sector.

Historically much of the cod caught in the N. Atlantic and Barents Sea originally came to Europe for primary processing. However, countries such as Norway and Iceland began to develop their own primary processing facilities, principally after the introduction of the 200-mile EEZs in 1976. They subsequently refined their processing away from commodity fillets and frozen blocks towards added value portions and loins for export to the USA and Europe. Whilst this kind of added value processing (particularly for the fresh trade is still very important for Iceland) these countries, along with Russia, now send much of their frozen fish to S.E. Asia, particularly China for primary processing. By doing this, there have been market gains from yield improvements and flexibility of product presentation, although with the loss of employment opportunities at home. There has therefore been a consequential loss in primary processing opportunities in the EU over many years, which when coupled with the rapid declines in domestic catches has led to loss of much of primary processing capacity.

Given the very large volume demands of the secondary processing sector and their consistent supply requirements for primary processed fish, local EU purchasing of intermittent supplies at ports without adequate primary processing facilities is rarely a viable option. However, many added value producers in the EU are working with the fishing sector to develop specific lower volume, higher value, origin branded niche fishery products to take advantage of the marketing opportunities for locally caught fish.

11. Nutritional Values of Fish Species

Pangasius, from Vietnamese aquaculture, has been cited as a nutritionally inferior and inadequately monitored species of fish that is unfairly competing against both marine and aquaculture white fish species caught or grown in the EU.

Obviously, all imports, but particularly aquaculture species are monitored at EU Border Inspection Posts on a frequent and regular basis in order to ensure safety and compliance with EU veterinarian drugs treatments.

The larger importing companies also regularly monitor their imports of fish to ensure that they are not adulterated and typical of the species. The results from one company for untreated fishery product imports using accredited analytical methods and laboratories are set out in below:

Analysis	Atlantic cod	Pacific cod	Pangasius	Plaice
Moisture %	84.4	81.6	82.2	78.3
Protein %	14.7	18.1	16.4	20.1
Carbohydrate %	0.1	0.1	0.1	0.1
Fat %	0.4	0.3	1.3	1.7
Energy kcal/100g	63	75	77	96

As can be seen from these results, white fish flesh tends to comprise protein with low amounts of fat and carbohydrates. It can also be seen that pangasius is not untypical of other white fish species, directly challenging the claims of inferior nutritional benefits alleged in this species.

12. Food Labelling Requirements and Declarations

EU labelling regulations require that any water addition to products in excess of 5 % has to be declared on-pack in the ingredients declaration. Also, that there is both a gross and net weight declaration when a glazed product is offered for sale. Any QUID (quantitative ingredient declarations) for fish should also reflect actual weight of fish used.

Sodium polyphosphates have been used for a long time to increase succulence in fishery products. Use is in compliance with EC regulations, provided of course that they are within specified limits and they are appropriately declared. However, new additives are now being offered for use in primary fish processing, often by European companies. These can be sold under the guise of one purpose, but have side benefits of increasing water up-take in fishery product by 6-12 %. There is therefore the potential for abuse through labelling since these additives can be difficult to detect analytically. Polyphosphates, on the other hand, can be identified relatively easily and on-pack declarations monitored. For those companies and authorities regularly monitoring products, any additional undeclared moisture addition can be detected.

Protein extracts can be injected directly into fish flesh to accord with anticipated analytical protein contents for the species, but which would mask additional added water, which may well be the purpose of the protein use. This type of addition is more difficult to detect, but can be done by profiling the amino acids within the protein components.

The described treatments have been used in the meat industry in Europe for some time and where inappropriate, are constantly challenged by enforcement authorities. There is evidence of use, both internally within Europe and also within some imported fishery products as well. It is essential that importers and manufacturers in Europe are both aware and ensure that the treated products are both legally permitted and appropriately labelled in order to ensure a fair and legally compliant cost base. It must be emphasised however, that this is not just potentially an import issue, but it can equally apply to nationally supplied fish and fishery products.

AIPCE/CEP supports transparency of labelling of all fishery products and believes that there needs to be enforcement to ensure both fair competition and consumer choice.

13. Costs and Import Price Trends

13.1 Oil Prices

2008 was an extraordinary year for the **crude oil market**. From mid-2007 a trend of higher pricing had been running that at the beginning of 2008 saw oil prices approaching the \$100 level. They finally broke through this level in February and then continue running up to a record high of \$145/barrel by end of June. This then turned around completely with prices dropping back to \$100 by end of September and then further collapsing to below \$40 by the end of the year.

For fishermen fuel represents one of their highest operating costs and with such rapid changes at the beginning of the year it was an extremely turbulent and troubling time

for that sector of the industry (in common with many sectors of global industry of course).

For fishermen, who are governed by seasonal catching limits, weather and other factors that do not necessarily allow them to smooth out catching patterns, much of their 2008 activity was based around the time of the highest fuel costs and it was almost impossible for them to find relief from the challenges this gave them.

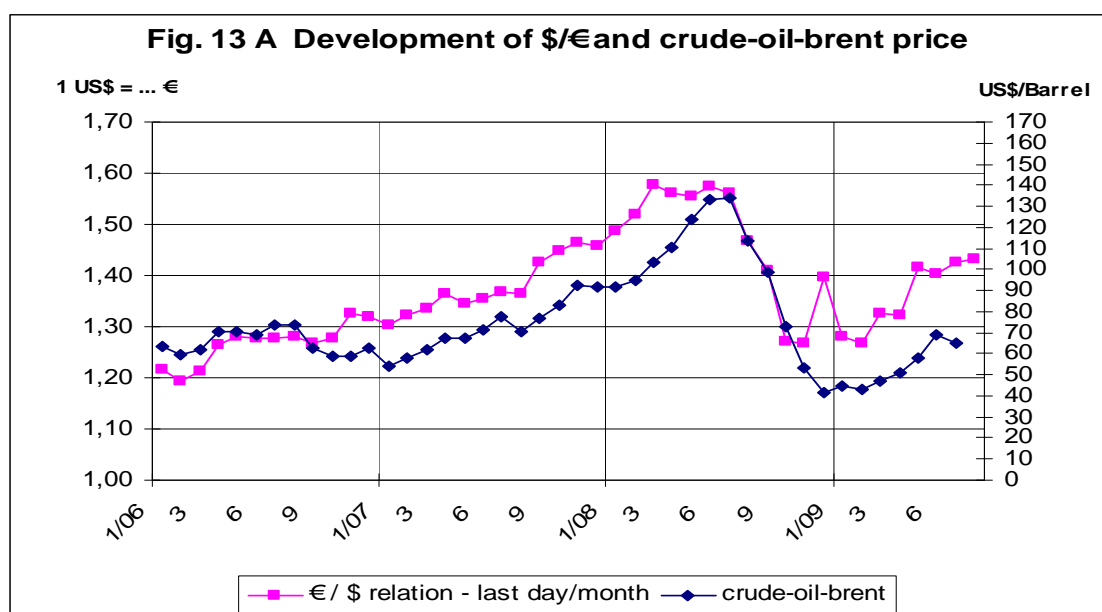
Opportunities for introducing new technologies and adaptation of catching methods may help in the future but the severity and suddenness of these cost changes in 2008 provided a tough environment for all to operate in.

By late in the year the lower prices perhaps offered some scope for improvement in 2009, but since the spring oil prices have begun to rise again.

Whilst the EU fishing sector is able to advantage of fuel tax reductions, there are no such benefits for the processing industry, where energy and transport cost rises have been very significant.

13.2 Currency Exchange Rates

Volatility was not unique to the oil market as can be seen in Fig. 13 A. Currency exchange rates also became unstable during 2008. The strong run of the US\$ finally turned around and over the second half of 2008 the Euro (€) saw as much as 25 % of its value lost against the \$. The UK£ saw even greater change.



In the early months of 2009 some stability has returned but in general the \$ is stronger by 10-15 % than in late 2008.

Fishery products are often traded internationally in the US\$. With the reliance on imports of all seafood products and in particular finfish, the effect of such volatility has been very challenging to the market. In general a weak dollar was helpful to EU importers but challenging for exporters. The shift that happened in the latter part of

2008 may have helped the exporters (assuming they had fish to export) but posed a very different scenario for importers.

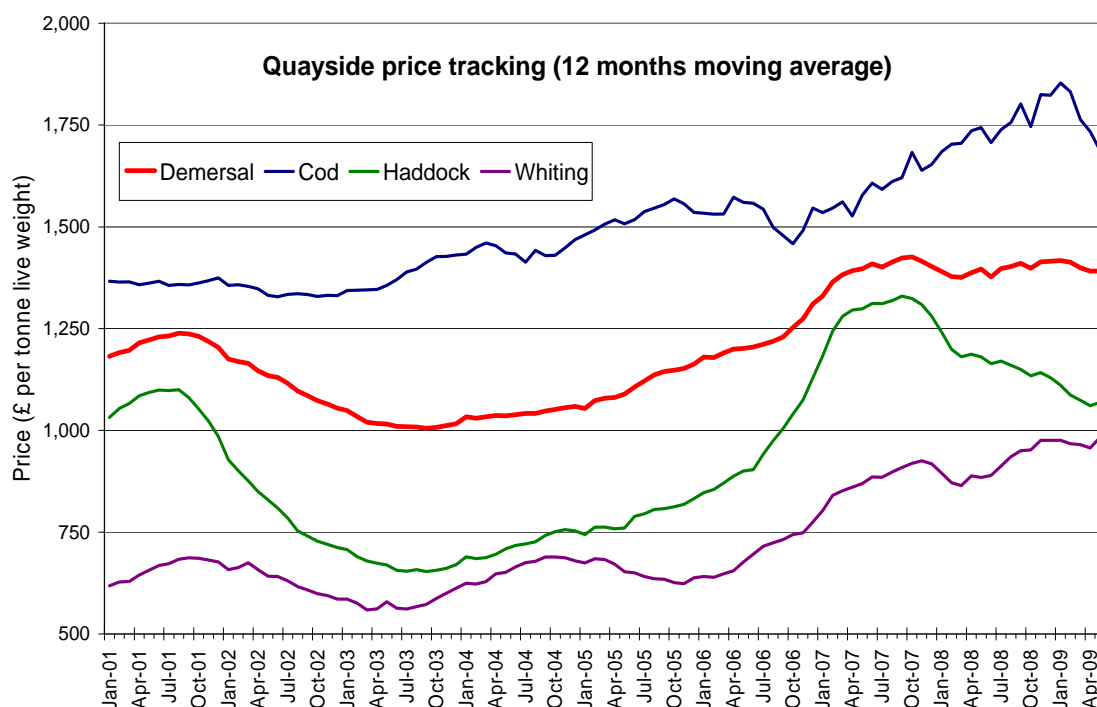
13.3 Market Place Cost-Quality Comparisons

Authenticity and transparent labelling is vital, as previously discussed. There has been a number of quoted cost-quality comparisons undertaken and used to demonstrate that imported products are undercutting national landed or cultured fishery products, but they have not necessarily been compared. Where such comparisons are undertaken, it is essential that all label declarations and compositional parameters are completed.

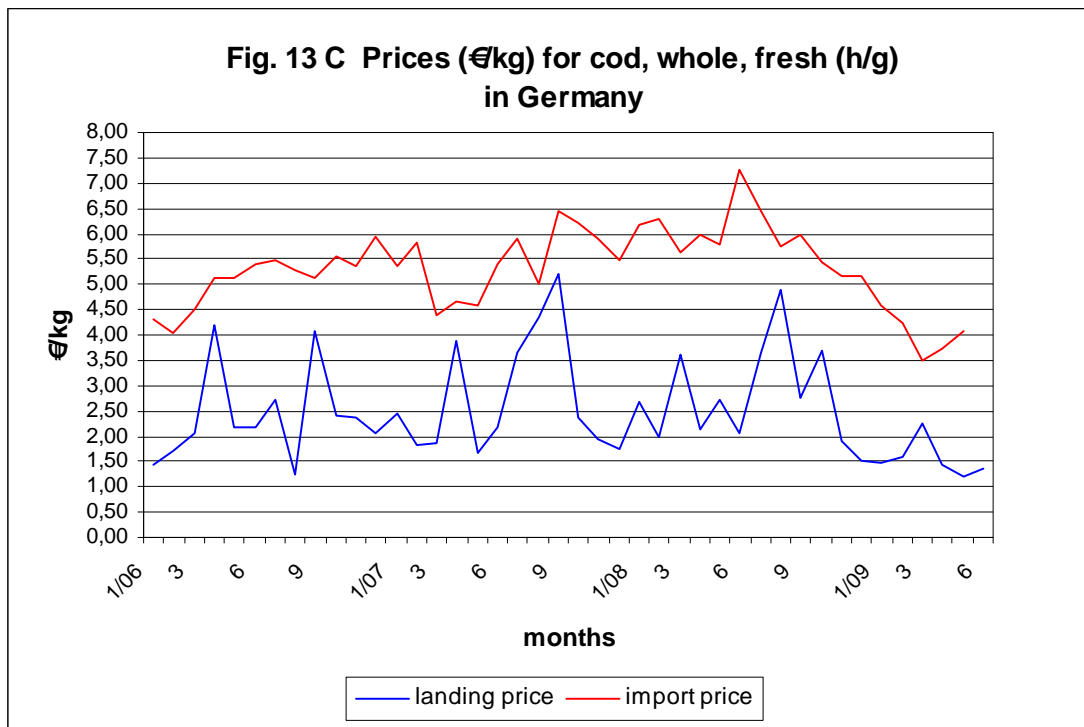
13.4 National Landed Prices versus Import Prices

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. However, Fig. 13 B shows for the period January 2001 to April 2009, which was extracted from a UK Seafish report based on the UK Government Marine Fisheries Agency, statistics for the prices of key landed species across all ports. These prices were divided by total landed volume, so giving a national average price. This indicates that prices have generally been rising over recent years, only showing a dip for cod in the first quarter of 2009.

Fig. 13 B

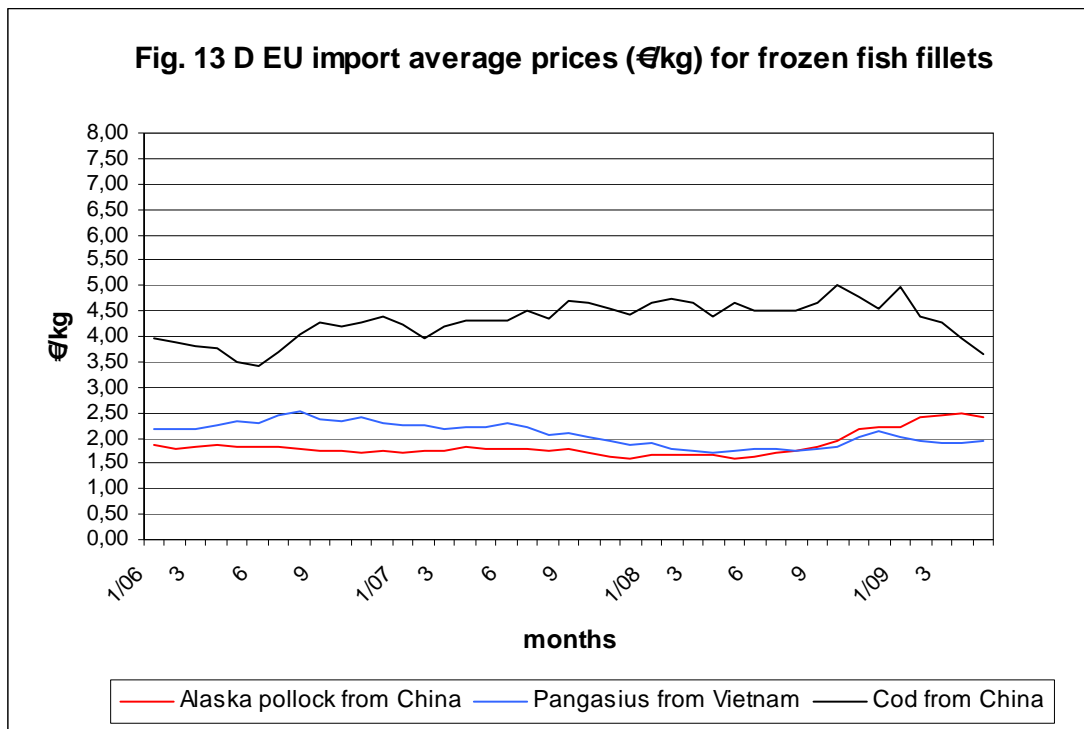


Similar data from Germany for cod (see Fig. 13 C), whilst not showing the rising trend, does show a steady state and what is more, when compared to fresh imports, demonstrates that imports are typically more costly. Note that the UK prices are moving averages smoothing out the peaks and troughs seen in the German data.

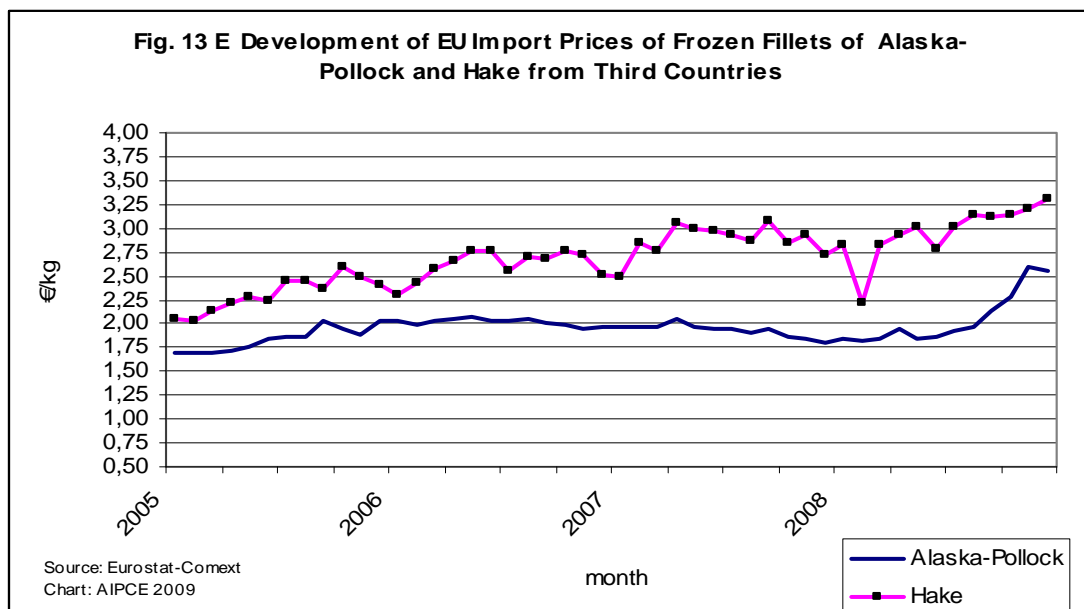


As is understood, the processing industry is heavily reliant on imported primary processed fish and the chart below, based on Eurostat figures for Germany, demonstrates that prices, with the exception of cod, have been relatively stable. Cod prices started a dramatic fall in very late 2008 seemingly because EU consumers were no longer prepared to pay the high prices at a time of recession. As previously discussed, cod lost its prime volume position to Alaska pollock in 2008. So, lower import prices for cod are also reflected in lower EU landing prices. However, at the national level, the concerns over long-term sustainability of cod stocks in EU waters are also an issue influencing price with consumers and other stakeholders opting for alternative sources showing better recovery and stock health.

Whilst Alaska pollock is the principle species of choice for further processing across much of the EU, again as discussed, supplies may become limited as quota reductions in the USA are implemented. Fig. 13 D shows the price trend for Alaska pollock in comparison to pangasius fillets, where until recently, pangasius fillets for processing have been higher than Alaska pollock. This fact tends to counter the argument that pangasius is depressing fish prices generally.



Purchase prices for imported frozen fillets of frozen fillets and meat of Alaska pollock and hake have been published in the AIPCE/CEP report for a number of years, but have not been highlighted in this written section. Monthly purchase costs for the past 3 years 2005 to 2008 can be seen in Tables 13.1 to 13.3 and are represented in the following Fig. 13 E:



The average annual prices for the Alaska pollock and the hake fillets have been calculated from these tables and presented in the text below. From this it can be seen that there is in fact there is an overall price increase for imported hake over the past 4 years, not a deflation, whilst Alaska pollock price has risen overall over this time period although there was a slight drop in 2007.

One word of caution when attempting to compare the EU landed hake prices with the imported hake prices – these are essentially different species and destined for different market sectors to the fresh European hake (*Merluccius merluccius*).

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

Hake species from Argentina, Chile and Peru tends to be less white, softer fleshed and with much more pronounced fat line than European hake and so command a lower price. These hakes will often be labelled as generic white fish in coated products and would therefore not be traded against fresh hake fillets.

Import prices for cod have not been tracked in a similar way in the AIPCE reports, but prices have continued to rise year on year as well, rising significantly in 2008 for the reasons of reduced availability as previously described. However, the fall back that began at the end of 2008 has accelerated in 2009 as the species reached price levels that were no longer sustainable relative to consumer demand.

14. The End

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.

Neither AIPCE/CEP nor any person acting in its name may guarantee the accuracy of the information contained in this study or assume any responsibility for use which may be made of it.

AIPCE/CEP would welcome comments and suggestions (aipce@agep.eu) about additional topics the reader wishes to see covered in further detail.

* * *

Tab. 4.1 FOOD BALANCE FOR FISH AND FISHERY PRODUCTS

1000 tons live weight

	EU (15)						EU (25)		EU (27)			
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009 b)
Catches a)	8.009	7.628	7.357	7.414	7.922	7.536	7.230	6.905	5.632	5.576	5.032	4.982
+ Aquaculture production	-	-	-	-	-	-	-	-	1.336	1.402	1.402	1.402
- Non-food uses b)	2.146	1.822	2.100	2.500	3.000	2.600	2.500	2.400	1.800	1.500	1.300	1.100
= Supply for consumption	5.863	5.806	5.257	4.914	4.922	4.936	4.730	4.505	5.168	5.478	5.134	5.284
+ Imports (Third countries) c)	6.595	6.007	6.422	7.050	6.735	7.477	7.993	8.355	9.066	9.395	9.421	9.515
= Total supply	12.458	11.813	11.679	11.964	11.657	12.413	12.723	12.860	14.234	14.873	14.555	14.799
- Exports (Third countries) c)	1.459	1.610	1.654	1.879	1.752	1.995	2.239	2.196	2.039	2.048	2.010	1.990
= Total consumption	10.999	10.203	10.025	10.085	9.905	10.418	10.484	10.664	12.195	12.825	12.545	12.809
Total supply (kg/caput) d)	33	31	31	32	31	32	28	28	29	30	30	30
by catches for consumption in %	47	49	45	41	42	40	37	35	36	37	35	36
by third countries imports in %	53	51	55	59	58	60	63	65	64	63	65	64
Supply for consumption (kg/caput) e)	29,5	27,1	26,6	26,6	26,0	27,2	22,8	23,1	26,3	25,9	25,2	25,6
Self-sufficiency (%) f)	53	57	52	49	50	47	45	42	42	43	41	41

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 2009

Tab. 4.2 RESULTS OF THE TABLES "ORIGIN OF IMPORTS OF IMPORTANT WHITE FISH INTO EU FROM THIRD COUNTRIES"

calculated on the basis of tons live weight

Species	Catches of quoted species					Third countries imports					Total supply (catches + import)				
	1000 tons					1000 tons					1000 tons				
	Year	2004 c)	2005 c)	2006 d)	2007 d)	2008 d)	2004 c)	2005 c)	2006 d)	2007 d)	2008 d)	2004 c)	2005 c)	2006 d)	2007 d)
Total a)	324	311	320	297	292	2.617	2.547	2.644	2.633	2.545	2.941	2.858	2.964	2.930	2.837
Cod	139	125	131	133	117	801	836	824	812	732	940	961	955	945	849
Saithe	51	55	68	58	65	154	169	177	168	175	205	224	245	226	240
Hake	41	44	41	38	46	628	563	560	512	477	669	607	601	550	523
Alaska-Pollock	-	-	-	-	-	746	707	811	875	906	746	707	811	875	906
Haddock	62	60	52	48	47	140	143	142	156	152	202	203	194	204	199
A. Redfish	31	27	28	20	17	111	95	89	73	73	142	122	117	93	90
Hoki	-	-	-	-	-	37	34	41	37	30	37	34	41	37	30
Plaice b)	77	68	71	64	62	15	13	12	11	9	92	81	83	75	71

Species	Total supply:														
	by catches					by third countries imports					by imports from China				
	Year	(%)				(%)					(%)				
	2004 c)	2005 c)	2006 d)	2007 d)	2008 d)	2004 c)	2005 c)	2006 d)	2007 d)	2008 d)	2004 c)	2005 c)	2006 d)	2007 d)	2008 d)
Total a)	11	11	11	10	10	89	89	89	90	90	17	20	25	22	21
Cod	15	13	14	14	14	85	87	86	86	86	11	15	18	18	12
Saithe	25	25	28	26	27	75	75	72	74	73	1	2	4	7	9
Hake	6	7	7	7	9	94	93	93	93	91	-	-	-	1	1
Alaska-Pollock	-	-	-	-	-	100	100	100	100	100	45	48	56	41	45
Haddock	31	30	27	24	24	69	70	73	76	76	8	9	14	16	18
A. Redfish	22	22	24	22	19	78	78	76	78	81	29	36	30	31	26
Hoki	-	-	-	-	-	100	100	100	100	100	1	3	6	10	28
Plaice b)	84	84	86	85	87	16	16	14	15	13	29	27	25	33	25

Notes: a) Total of the 7 listed species without plaice.- b) Listed for reason of comparison.- c) EU (25).- d) EU (27).-

Source: Eurostat-Comext; EU catch report.-
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**Tab. 4.3 Origin of imports into EU from third countries
for important white fish species a)**

Origin b)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 e)	2006 f)	2007 f)	2008 f)	2008	08/07
Whole, fresh	192.162	170.215	158.042	153.514	100	-3
of it from Norway	54.206	49.282	50.071	44.587	29	-11
Iceland	47.383	48.483	47.256	54.212	35	15
Faroe Isles	32.860	20.595	15.160	9.748	6	-36
Russia	2.262	1.316	106	43	0	-60
South Africa	19.731	19.499	16.600	16.185	11	-2
Namibia	7.187	5.564	4.846	6.183	4	28
Whole, frozen	260.717	307.367	283.144	267.242	100	-6
of it from Norway	31.921	46.989	48.369	49.823	19	3
Iceland	14.344	19.369	15.942	16.297	6	2
Faroe Isles	1.098	2.176	859	865	0	1
Russia	85.256	86.508	60.934	48.934	18	-20
South Africa	21.543	18.204	14.468	14.163	5	-2
Argentina	17.039	26.404	21.107	19.959	7	-5
Namibia	17.199	19.177	11.203	13.797	5	23
Fillet, fresh c)	63.874	61.653	60.910	49.799	100	-18
of it from Norway	18.347	18.905	19.211	17.238	35	-10
Iceland	38.494	34.781	32.065	26.076	52	-19
Faroe Isles	6.723	7.558	9.496	6.297	13	-34
Fillet, frozen	1.563.129	1.643.610	1.686.255	1.660.725	100	-2
of it from Norway	77.933	66.767	55.004	55.844	3	2
Iceland	165.297	157.899	157.115	135.837	8	-14
Faroe Isles	53.826	55.779	58.879	60.400	4	3
Russia	126.912	155.983	137.967	160.448	10	16
South Africa	37.255	25.242	31.619	34.452	2	9
Argentina	127.640	138.761	108.617	85.481	5	-21
Namibia	111.795	96.537	107.524	107.750	6	0
USA	358.394	310.042	392.424	342.151	21	-13
New Zealand	31.118	36.608	32.534	20.870	1	-36
China	415.212	535.703	550.203	605.483	36	10
Meat, frozen	129.260	154.272	134.673	130.580	100	-3
of it from Norway	4.146	2.373	2.281	1.842	1	-19
Iceland	14.143	12.905	11.615	11.504	9	-1
Faroe Isles	9.779	15.246	12.872	13.481	10	5
Russia	14.030	23.703	23.850	22.304	17	-6
USA	24.400	44.728	27.750	27.732	21	0
Argentina	7.904	12.747	8.185	8.231	6	1
Namibia	23.753	25.445	16.486	18.054	14	10
China	10.572	15.970	16.049	12.821	10	-20
Fish and Fillet, dry/salted	336.592	307.134	310.148	283.262	100	-9
of it from Norway	162.035	159.062	173.145	161.182	57	-7
Iceland	113.910	94.979	87.351	73.715	26	-16
Supply (Catches + Import)	2.859.194	2.963.991	2.930.277	2.837.668	100	-3
of it catches of quoted species	313.460	319.741	297.106	292.545	10	-2
import from third countries	2.545.734	2.644.250	2.633.171	2.545.123	90	-3
of it from China d)	433.406	561.543	575.936	626.512	25	9
USA d)	437.533	396.308	498.785	441.970	17	-11
Norway	348.587	343.377	348.081	330.517	13	-5
Iceland	393.571	368.416	351.344	317.640	12	-10
Russia d)	244.041	276.820	223.893	234.510	9	5
Namibia d)	159.935	146.723	140.058	145.784	6	4
Argentina d)	153.747	178.868	138.815	114.577	5	-17
Faroe Isles	126.179	119.676	114.730	108.458	4	-5
South Africa d)	86.927	67.532	67.843	69.570	3	3
Chile d)	39.041	41.387	42.663	37.794	1	-11
New Zealand d)	37.714	44.252	40.271	25.343	1	-37
Peru d)	17.906	19.234	16.704	24.561	1	47
Uruguay d)	34.940	37.158	29.921	22.518	1	-25

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.- e) EU (25).- f) EU (27).-

Source: Eurostat-Comext; EU catch report.- Published by: AIPCE 2009

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

Origin b)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 d)	2006 e)	2007 e)	2008 e)	2008	08/07
Whole, fresh	43.625	37.071	31.242	28.464	100	-9
of it from Argentina	30	22	27	20	0	-27
Faroe Isles	6.814	4.108	2.048	2.106	7	3
Iceland	10.392	9.915	8.133	7.983	28	-2
USA	-	-	-	23	0	-
Norway	23.961	21.667	20.767	18.202	64	-12
Russia	2.210	1.002	22	-	-	-100
South Africa	-	-	-	-	-	-
Whole, frozen	136.228	143.899	136.990	124.426	100	-9
of it from Argentina	-	25	37	-	-	-
Faroe Isles	446	1.114	112	63	0	-44
Iceland	376	712	1.423	1.037	1	-27
USA	37.216	42.148	53.162	50.065	40	-
Norway	14.672	13.501	15.802	16.250	13	3
Russia	78.951	80.147	56.656	43.981	35	-22
South Africa	-	-	-	-	-	-
Fillet, fresh	40.501	43.349	42.259	35.064	100	-17
of it from Faroe Isles	150	376	796	644	2	-19
Iceland	27.276	28.122	27.302	20.657	59	-24
Norway	12.852	14.510	14.025	13.616	39	-3
Fillet, frozen	258.012	266.923	266.598	240.122	100	-10
of it from Argentina	35	95	25	-	-	-
Chile	-	46	-	94	0	-
China	102.890	114.524	125.610	125.721	52	0
Faroe Isles	10.708	11.863	12.888	13.374	6	4
Iceland	70.596	71.447	69.628	49.343	21	-29
USA	529	214	964	644	0	-
New Zealand	201	136	30	58	0	93
Norway	35.318	30.583	26.911	21.770	9	-19
Russia	34.393	32.658	26.321	25.656	11	-3
South Africa	46	-	-	-	-	-
Meat, frozen	21.402	25.708	24.599	20.348	100	-17
of it from Argentina	-	-	-	-	-	-
China	5.079	9.237	11.164	6.624	33	-41
Faroe Isles	119	207	236	113	1	-52
Iceland	9.654	7.972	7.258	6.687	33	-8
USA	2.224	3.294	1.723	3.416	17	-
Norway	2.686	1.791	1.936	1.445	7	-25
South Africa	-	-	-	-	-	-
Fish and Fillet, dry/salted	336.592	307.134	310.148	283.262	100	-9
of it from Iceland	113.910	94.979	87.351	73.715	26	-16
Norway	162.035	159.062	173.145	161.182	57	-7
Supply (Catches + Import)	961.494	955.233	944.962	849.082	100	-10
of it catches of quoted species	125.135	131.149	133.126	117.396	14	-12
import from third countries	836.359	824.084	811.836	731.686	86	-10
of it from Norway	251.523	241.114	252.587	232.465	32	-8
Iceland	232.204	213.147	201.095	159.422	22	-21
China c)	115.524	133.009	146.129	140.204	19	-4
Russia c)	136.205	132.289	95.193	79.042	11	-17
USA c)	47.529	51.184	61.567	59.861	8	-3
Faroe Isles c)	40.127	35.985	33.545	33.907	5	1
Chile c)	3	47	-	94	0	-
New Zealand c)	201	143	31	58	0	89
Argentina c)	65	142	89	20	0	-77
South Africa c)	46	-	-	-	-	-

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.- d) EU (25).- e) EU (27).-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2009

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

Origin b)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 d)	2006 e)	2007 e)	2008 e)	2008	08/07
Whole, fresh	22.348	15.246	13.556	11.702	100	-14
of it from Argentina	-	-	-	-	-	-
Faroe Isles	11.698	4.949	4.615	2.144	18	-54
Iceland	1.010	930	1.325	1.360	12	3
Namibia	-	-	-	-	-	-
Norway	8.585	8.415	7.566	8.193	70	8
Russia	2	-	-	-	-	-
South Africa	-	-	-	-	-	-
Whole, frozen	6.004	22.734	20.170	22.518	100	12
of it from Argentina	-	-	-	-	-	-
Faroe Isles	237	245	358	64	0	-82
Iceland	115	285	292	295	1	1
Namibia	-	-	-	-	-	-
Norway	5.643	22.061	19.438	21.875	97	13
Russia	10	116	34	213	1	534
South Africa	-	-	-	-	-	-
Fillet, fresh	17.037	12.658	13.478	9.187	100	-32
of it from Faroe Isles	4.942	4.876	7.506	4.673	51	-38
Iceland	6.639	3.426	829	950	10	15
Norway	5.454	4.357	5.143	3.563	39	-31
Fillet, frozen	111.352	109.501	106.607	116.124	100	9
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	2.283	5.366	11.740	14.511	12	24
Faroe Isles	33.109	35.667	38.406	42.046	36	9
Iceland	48.503	48.170	41.976	40.446	35	-4
Namibia	-	-	-	-	-	-
New Zealand	-	-	-	-	-	-
Norway	27.227	20.120	13.743	18.822	16	37
Russia	242	130	720	217	0	-70
South Africa	-	-	-	-	-	-
Meat, frozen	12.032	16.404	14.819	15.426	100	4
of it from Argentina	-	-	-	-	-	-
China	135	45	403	394	3	-2
Iceland	2.143	2.336	2.381	1.988	13	-16
Faroe Isles	8.606	13.576	11.868	12.679	82	7
Namibia	-	-	-	-	-	-
Norway	1.126	447	144	328	2	127
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	224.234	244.284	226.258	239.861	100	6
of it catches of quoted species	55.461	67.741	57.629	64.904	27	13
import from third countries	168.773	176.543	168.629	174.957	73	4
of it from Faroe Isles	58.592	59.313	62.754	61.605	35	-2
Norway	48.034	55.399	46.034	52.781	30	15
Iceland	58.411	55.147	46.802	45.039	26	-4
China c)	2.417	5.478	12.364	15.092	9	22
Russia c)	254	246	754	430	0	-43
South Africa c)	-	-	-	-	-	-
Namibia c)	-	-	-	-	-	-
Argentina c)	-	-	-	-	-	-
Chile c)	-	-	-	-	-	-
New Zealand c)	-	-	-	-	-	-

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

c) Incl. quantities not listed above.- d) EU (25).- e) EU (27).-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2009

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

Origin b)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 d)	2006 e)	2007 e)	2008 e)	2008	08/07
Whole, fresh	20.288	19.949	19.103	19.138	100	0
of it from Argentina	-	-	-	-	-	-
Faroe Isles	1.529	937	662	440	2	-33
Iceland	15.025	15.834	15.556	15.541	81	0
Namibia	-	-	-	-	-	-
Norway	3.643	3.078	2.871	3.145	16	10
Russia	4	26	4	2	0	-59
South Africa	-	-	-	-	-	-
Whole, frozen	16.853	23.288	15.625	15.895	100	2
of it from Argentina	4	122	265	45	0	-83
Faroe Isles	380	786	376	722	5	92
Iceland	13.755	18.135	12.712	12.909	81	2
Namibia	45	-	-	-	-	-
Norway	2.203	2.143	1.680	1.059	7	-37
Russia	290	1.877	455	1.014	6	123
South Africa	-	-	-	-	-	-
Fillet, fresh	6.336	5.646	5.173	5.549	100	7
of it from Faroe Isles	1.630	2.305	1.194	980	18	-18
Iceland	4.578	3.233	3.934	4.468	81	14
Norway	40	38	43	59	1	37
Fillet, frozen	50.802	39.299	33.417	31.977	100	-4
of it from Argentina	110	77	-	20	0	-
Chile	37	6	-	-	-	-
China	32.812	25.548	23.599	19.059	60	-19
Faroe Isles	198	490	863	164	1	-81
Iceland	15.779	12.659	7.958	12.473	39	57
Namibia	-	-	-	-	-	-
New Zealand	3	13	-	-	-	-
Norway	373	126	144	116	0	-19
Russia	895	-	8	-	-	-
South Africa	-	112	42	-	-	-
Meat, frozen	273	359	256	439	100	72
of it from Argentina	-	-	-	-	-	-
China	-	7	-	99	23	-
Faroe Isles	-	-	-	-	-	-
Iceland	272	340	254	329	75	30
Namibia	-	-	-	-	-	-
Norway	-	-	-	-	-	-
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	123.923	116.570	93.405	90.069	100	-4
of it catches of quoted species	29.371	28.030	19.832	17.071	19	-14
import from third countries	94.552	88.540	73.573	72.998	81	-1
of it from Iceland	49.410	50.201	40.414	45.721	63	13
China c)	32.812	25.568	23.599	19.158	26	-19
Norway	6.260	5.385	4.738	4.378	6	-8
Faroe Isles	3.737	4.519	3.094	2.306	3	-25
Russia c)	1.189	1.903	468	1.016	1	117
Argentina c)	113	199	265	66	0	-75
South Africa c)	-	112	42	-	-	-100
New Zealand c)	10	41	1	-	-	-100
Chile c)	37	18	-	-	-	-
Namibia c)	45	-	-	-	-	-

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

c) Incl. quantities not listed above.- d) EU (25).- e) EU (27).-

Source: Eurostat-Comext; EU catch report.-

Published by: AIPCE 2009

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

Origin b)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 d)	2006 e)	2007 e)	2008 e)	2008	08/07
Whole, fresh	49.640	45.989	46.091	46.558	100	1
of it from Argentina	-	-	-	-	-	-
Faroe Isles	12.813	10.602	7.832	5.057	11	-35
Iceland	20.954	21.800	22.241	29.326	63	32
Namibia	-	-	-	-	-	-
Norway	15.828	13.299	15.936	12.134	26	-24
Russia	45	288	80	41	0	-48
South Africa	-	-	-	-	-	-
Whole, frozen	15.143	13.206	16.354	15.814	100	-3
of it from Argentina	-	-	-	-	-	-
Faroe Isles	34	26	12	17	0	42
Iceland	99	237	1.515	2.056	13	36
Namibia	-	-	-	-	-	-
Norway	8.981	8.551	11.129	9.973	63	-10
Russia	5.971	4.288	3.698	3.721	24	1
South Africa	-	-	-	-	-	-
Fillet, frozen	74.519	78.531	89.611	85.235	100	-5
of it from Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	12.661	19.836	24.131	25.448	30	5
Faroe Isles	9.811	7.759	6.721	4.817	6	-28
Iceland	30.198	25.584	37.547	33.575	39	-11
Namibia	-	-	-	-	-	-
New Zealand	-	-	-	-	-	-
Norway	14.992	15.874	14.189	15.125	18	7
Russia	6.733	9.399	6.939	6.144	7	-11
South Africa	-	42	-	-	-	-
Meat, frozen	3.669	4.708	3.514	4.604	100	31
of it from Argentina	-	-	-	-	-	-
China	204	784	821	1.345	29	64
Faroe Isles	1.054	1.462	768	690	15	-10
Iceland	2.074	2.257	1.723	2.500	54	45
Namibia	-	-	-	-	-	-
Norway	334	134	200	70	2	-65
Russia	2	7	-	-	-	-
South Africa	-	-	-	-	-	-
Supply (Catches + Import)	202.779	194.161	204.008	199.343	100	-2
of it catches of quoted species	59.808	51.727	48.439	47.133	24	-3
import from third countries	142.971	142.434	155.569	152.210	76	-2
of it from Iceland	53.325	49.879	63.026	67.457	44	7
Norway	40.135	37.858	41.454	37.302	25	-10
China c)	12.900	20.721	24.952	26.824	18	7
Faroe Isles	23.712	19.849	15.333	10.581	7	-31
Russia c)	12.752	13.982	10.717	9.906	7	-8
South Africa c)	-	42	-	-	-	-
Argentina c)	-	-	-	-	-	-
Namibia c)	-	-	-	-	-	-
Chile c)	-	-	-	-	-	-
New Zealand c)	-	-	-	-	-	-

Notes: a) *Melanogrammus aeglefinus*.- b) Selected countries, which are most important for EU supply with white fish.-
c) Incl. quantities not listed above.- d) EU (25).- e) EU (27).-

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

Origin b)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 d)	2006 e)	2007 e)	2008 e)	2008	08/07
Whole, fresh	54.747	50.167	46.146	46.016	100	0
of it from Argentina	1.135	934	879	885	2	1
Chile	13.499	12.937	12.877	11.152	24	-13
Namibia	7.187	5.564	4.846	6.183	13	28
Norway	761	1.049	1.044	1.303	3	25
Peru	-	-	-	-	-	-
Russia	-	-	-	-	-	-
South Africa	19.731	19.499	16.600	16.185	35	-2
Uruguay	-	-	-	-	-	-
Whole, frozen	83.488	98.654	83.385	78.309	100	-6
of it from Argentina	17.001	25.960	20.805	19.914	25	-4
Chile	12.709	14.847	16.508	14.705	19	-11
Namibia	17.154	19.177	11.203	13.797	18	23
Norway	116	526	97	167	0	73
Peru	5	3	-	70	0	-
Russia	3	80	14	-	-	-100
South Africa	21.543	18.204	14.468	14.163	18	-2
Uruguay	-	50	51	77	0	-
Fillet, frozen	367.488	343.864	333.752	307.497	100	-8
of it from Argentina	126.676	137.131	108.186	85.267	28	-21
Chile	7.294	7.569	6.999	5.770	2	-18
China	954	3.404	6.741	6.231	2	-8
Namibia	111.716	96.437	107.524	107.750	35	0
Peru	16.456	17.047	15.388	21.474	7	40
Russia	19.133	54	-	-	-	-
South Africa	37.209	25.089	31.477	34.410	11	9
Uruguay	26.889	30.755	23.775	18.136	6	-24
USA	19.518	24.061	31.371	27.927	9	-11
Meat, frozen	57.055	67.357	48.600	45.395	100	-7
of it from Argentina	7.904	12.747	8.185	8.231	18	1
Chile	5.406	5.966	6.159	6.074	13	-1
China	58	111	140	-	-	-100
Namibia	23.753	25.445	16.486	18.054	40	10
Norway	-	1	-	-	-	-
Peru	1.325	2.050	1.173	2.173	5	85
Russia	1.398	-	4	-	-	-
South Africa	8.369	4.576	5.252	4.740	10	-10
Uruguay	3.192	3.373	2.570	1.873	4	-27
Supply (Catches + Import)	606.463	601.136	549.962	523.258	100	-5
of it catches of quoted species	43.685	41.094	38.080	46.041	9	21
import from third countries	562.778	560.042	511.882	477.217	91	-7
of it from Namibia c)	159.810	146.623	140.058	145.784	31	4
Argentina c)	152.716	176.772	138.055	114.297	24	-17
South Africa	86.882	67.378	67.797	69.570	15	3
Chile c)	38.908	41.320	42.543	37.700	8	-11
USA	27.312	35.641	41.215	34.587	7	-16
Peru	17.906	19.234	16.704	24.561	5	47
Uruguay	34.940	37.158	29.921	22.518	5	-25
China c)	1.021	3.515	6.881	6.231	1	-9
Norway	878	1.579	1.145	1.470	0	28
Russia c)	20.533	134	17	-	-	-100

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.- d) EU (25).- e) EU (27).-

Source: Eurostat-Comext; EU catch report.-

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

Origin b)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 d)	2006 e)	2007 e)	2008 e)	2008	08/07
Whole, fresh	1.515	1.794	1.905	1.637	100	-14
or it from Argentina	-	-	-	-	-	-
Faroe Isles	6	-	3	0	0	-
Iceland	2	4	2	2	0	13
Norway	1.428	1.773	1.887	1.611	98	-15
Russia	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
USA	-	-	-	-	-	-
Whole, frozen	2.640	4.938	10.484	10.272	100	-2
of it from Argentina	21	-	-	-	-	-
Faroe Isles	-	2	-	-	-	-
Iceland	-	-	-	-	-	-
Namibia	-	-	-	-	-	-
Norway	306	208	224	499	5	123
Russia	31	-	78	5	0	-
South Africa	-	-	-	-	-	-
USA	2.151	4.172	9.889	9.419	92	-5
Fillet, frozen	667.670	764.706	819.485	850.149	100	4
of it from Argentina	99	86	220	-	-	-100
Chile	-	-	71	-	-	-
China	262.522	364.325	354.634	406.074	48	15
Faroe Isles	-	-	-	-	-	-
Iceland	221	38	2	-	-	-100
Namibia	56	45	-	-	-	-
Norway	17	62	11	7	0	-34
Russia	65.517	113.741	103.978	128.432	15	24
South Africa	-	-	-	-	-	-
USA	338.346	285.767	360.027	313.571	37	-13
Meat, frozen	34.830	39.736	42.885	44.368	100	3
of it from Argentina	-	-	-	-	-	-
China	5.097	5.787	3.520	4.359	10	24
Faroe Isles	-	-	-	-	-	-
Iceland	-	-	-	-	-	-
Norway	-	-	-	-	-	-
Russia	7.551	14.458	12.682	15.679	35	24
South Africa	-	-	-	-	-	-
USA	22.175	19.478	26.027	24.316	55	-7
Supply (Catches + Import)	706.654	811.174	874.759	906.426	100	4
of it catches of quoted species	-	-	-	-	-	-
import from third countries	706.654	811.174	874.759	906.426	100	4
of it from China c)	267.641	370.552	358.263	410.563	45	15
USA c)	362.672	309.417	395.943	347.307	38	-12
Russia c)	73.098	128.199	116.738	144.116	16	23
Norway	1.751	2.042	2.122	2.117	0	0
Iceland	222	42	4	2	0	-52
Faroe Isles	6	2	3	0	0	-87
Argentina c)	120	86	220	-	-	-
Chile c)	-	-	71	-	-	-
Namibia c)	56	45	-	-	-	-
South Africa c)	-	-	-	-	-	-

Notes: a) Theragra chalcogramma.- b) Selected countries, which are most important for EU supply with white fish.-
c) Incl. quantities not listed above.- d) EU (25).- e) EU (27).-

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

Origin b)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 e)	2006 f)	2007 f)	2008 f)	2008	08/07
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	362	648	137	9	100	-94
of it from Argentina	13	297	-	-	-	-
Faroe Isles	-	2	1	-	-	-
Iceland	-	-	-	-	-	-
Namibia	-	-	-	-	-	-
New Zealand	30	143	127	9	100	-
Norway	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Thailand	0	-	-	-	-	-
USA	-	-	-	-	-	-
Fillet, frozen	33.286	40.785	36.785	29.621	100	-19
of it from Argentina	719	1.373	186	194	1	4
Chile	93	3	49	-	-	-100
China	1.090	2.700	3.748	8.439	28	125
Faroe Isles	-	-	-	-	-	-
Iceland	-	-	2	-	-	-
Namibia	23	55	-	-	-	-
New Zealand	30.914	36.460	32.504	20.811	70	-36
Norway	6	-	1	4	0	-
South Africa	-	-	101	42	0	-
Thailand	124	101	62	69	0	12
USA	1	-	61	8	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)	33.648	41.434	36.922	29.629	100	-20
of it catches of quoted species	-	-	-	-	-	-
import from third countries	33.648	41.434	36.922	29.629	100	-20
of it from New Zealand c)	30.944	36.603	32.631	20.820	70	-36
China c)	1.090	2.700	3.748	8.439	28	125
Argentina c)	732	1.670	186	194	1	4
Thailand c)	124	101	62	69	0	12
South Africa c)	-	-	101	42	0	-
USA c)	1	-	61	8	0	-
Norway	6	-	1	4	0	-
Chile c)	93	3	49	-	-	-100
Faroe Isles	-	2	1	-	-	-
Iceland	-	-	2	-	-	-
Namibia c)	23	55	-	-	-	-

Notes: a) *Macrurus novaezealandiae*.- b) Selected countries, which are most important for EU supply with white fish.- c) Incl. quantities not listed above.- d) Not available.- e) EU (25).- f) EU (27).-

Source: Eurostat-Comext; EU catch report.-

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

Origin	Quantity (tons live weight)				Share (%)	Change (%)
	2005 b)	2006 c)	2007 c)	2008 c)	2008	08/07
Whole, fresh	4.715	5.209	4.171	4.708	100	13
of it from						
Argentina	-	-	-	-	-	-
Faroe Isles	346	322	264	200	4	-24
Iceland	1.923	2.520	2.042	2.869	61	40
Norway	2.443	2.363	1.860	1.636	35	-12
Panama	-	-	-	-	-	-
Russia	1	1	1	0	0	-78
South Africa	-	-	-	-	-	-
USA	-	-	-	-	-	-
Whole, frozen	750	771	865	570	100	-34
of it from						
Argentina	-	-	-	-	-	-
Faroe Isles	6	14	38	7	1	-82
Iceland	117	90	155	214	37	38
Namibia	-	-	-	-	-	-
Norway	36	65	42	13	2	-70
Panama	-	-	-	-	-	-
Russia	411	514	287	65	11	-78
South Africa	-	-	-	-	-	-
USA	-	27	5	6	1	-
Fillet, frozen	7.664	6.367	6.372	3.841	100	-40
of it from						
Argentina	-	-	-	-	-	-
Chile	-	-	-	-	-	-
China	3.547	3.129	3.756	2.257	59	-40
Faroe Isles	132	13	4	2	0	-53
Iceland	3.807	3.139	2.507	1.563	41	-38
Namibia	-	-	-	-	-	-
Norway	-	-	-	-	-	-
Panama	-	-	-	-	-	-
Russia	157	45	77	17	0	-78
South Africa	-	-	-	-	-	-
USA	-	-	2	-	-	-
Supply (Catches + Import)	81.187	83.417	75.842	71.216	100	-6
of it catches of quoted species	68.058	71.071	64.434	62.098	87	-4
import from third countries	13.129	12.346	11.408	9.118	13	-20
of it from						
Iceland	5.846	5.750	4.704	4.646	51	-1
China	3.574	3.136	3.924	2.257	25	-42
Norway	2.479	2.428	1.902	1.648	18	-13
Faroe Isles	484	349	306	209	2	-32
Russia	569	561	365	82	1	-78
USA	-	27	7	6	0	-
Argentina	-	-	-	-	-	-
South Africa	-	-	-	-	-	-
Namibia	-	-	1	-	-	-
Chile	-	-	-	-	-	-
Panama	-	-	-	-	-	-

Notes: a) Pleuronectes Platessa.- b) EU (25).- c) EU (27).-

Source: Eurostat-Comext; EU catch report.-

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

Origin b)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 d)	2006 e)	2007 e)	2008 e)	2008	08/07
Whole, fresh	373.128	393.110	459.920	494.915	100	8
of it from Canada	243	398	329	195	0	-41
Chile	48	-	-	-	-	-
Färöer	10.324	4.741	10.080	23.575	5	134
Iceland	3.572	2.899	540	1	0	-100
Norway	358.864	384.937	448.861	471.069	95	5
USA	75	135	108	74	0	-32
Whole, frozen	28.306	34.863	30.941	30.370	100	-2
of it from Canada	3.016	3.073	1.820	1.498	5	-18
Chile	770	1.244	1.700	2.006	7	18
China	446	821	919	1.000	3	9
Färöer	600	187	144	939	3	552
Iceland	15	1	2	-	-	-100
Norway	3.195	3.487	3.454	3.413	11	-1
Thailand	2	15	6	101	0	1700
USA	19.356	24.851	22.519	19.875	65	-12
Fillet, fresh	61.131	61.393	78.414	78.405	100	0
of it from Canada	292	453	301	240	0	-20
Chile	1.493	159	786	1.189	2	51
China	172	490	1.711	381	0	-78
Färöer	135	168	25	-	-	-100
Iceland	11	6	3	4	0	17
Norway	58.028	59.718	74.724	76.285	97	2
USA	970	355	847	186	0	-78
Fillet, frozen	184.348	200.386	195.043	196.091	100	1
of it from Canada	1.392	1.816	797	589	0	-26
Chile	103.340	98.133	86.371	85.652	44	-1
China	37.915	56.492	61.763	64.228	33	4
Färöer	8.112	7.253	7.524	10.651	5	42
Iceland	710	200	183	164	0	-11
Norway	22.036	22.581	21.186	22.551	12	6
Thailand	2.545	3.837	5.424	4.499	2	-17
USA	8.087	9.992	11.616	7.459	4	-36
Salmon prepared	82.934	73.777	69.882	72.899	100	4
of it from Canada	-	-	-	-	-	-
Chile	2.043	1.947	2.082	3.152	4	51
China	1.176	583	434	1.462	2	237
Färöer	41	53	46	16	0	-66
Iceland	83	42	29	27	0	-4
Norway	4.814	3.221	3.566	4.080	6	14
Thailand	5.223	5.190	5.421	5.263	7	-3
USA	47.557	43.171	45.397	42.872	59	-6
Supply (Catches + Import)	669.786	702.985	756.549	794.880	100	5
of it catches of quoted species	1.071	849	763	606	0	79
import from third countries	668.715	702.136	755.786	794.274	100	5
of it from Norwegen c)	446.936	473.944	551.792	577.398	73	5
Chile c)	107.693	101.483	90.938	91.999	12	1
USA	76.045	78.504	80.487	70.466	9	-12
China c)	39.710	58.443	64.828	67.140	8	4
Färöer	19.213	12.402	17.844	35.319	4	98
Canada	27.394	25.941	16.128	17.898	2	11
Thailand	7.775	9.041	10.851	9.864	1	-9
Iceland c)	4.391	3.148	757	196	0	-74

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.- d) EU (25).- e) EU (27).-

Source: Eurostat-Comext; EU catch report.-

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

Origin b)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 c)	2006 d)	2007 d)	2008 d)	2008	08/07
Whole, fresh	3.653	3.861	3.210	3.018	100	-6
of it from Kenia	230	336	261	221	7	-15
Norway	12	3	4	3	0	-33
Russia	1.562	916	39	2	0	-95
Tansania	203	155	89	113	4	27
Uganda	1.561	2.351	2.736	2.620	87	-4
Whole, frozen	27.631	35.737	33.725	36.679	100	9
of it from Bangladesh	3.597	3.761	2.319	4.692	13	102
China	1.886	3.412	5.983	5.988	16	0
Indonesia	1.592	1.733	850	1.462	4	72
Kenia	473	1.085	1.160	985	3	-15
Tansania	1.118	1.716	604	876	2	45
Thailand	6.797	9.409	8.844	9.275	25	5
Uganda	1.794	1.912	1.056	1.771	5	68
Vietnam	1.468	1.708	1.530	1.674	5	9
Fillet, fresh	111.802	93.335	94.029	73.842	100	-21
of it from Kenia	8.234	6.758	6.513	5.491	7	-16
Russia	3.120	2.156	1.182	921	1	-22
Tansania	47.171	39.512	44.032	36.705	50	-17
Uganda	46.632	41.112	37.052	29.865	40	-19
Vietnam	3.004	2.456	3.416	499	1	-85
Fillet, frozen	190.431	412.687	595.388	762.521	100	28
of it from China	2.446	8.398	17.293	22.818	3	32
Indonesia	1.854	2.725	1.956	4.447	1	127
China	2.446	8.398	17.293	22.818	3	32
Kenia	3.468	2.796	5.248	3.391	0	-35
Kasachstan	12.166	11.462	12.858	15.293	2	19
Russia	16.247	13.912	13.823	8.270	1	-40
Tansania	18.246	19.659	18.713	15.111	2	-19
Uganda	6.256	6.651	7.937	3.523	0	-56
Vietnam	126.594	343.655	513.525	688.010	90	34
Meat, fresh	1.983	2.746	6.056	4.868	100	-20
of it from Norway	171	295	69	128	3	87
Sri Lanka	3	253	2.974	1.669	34	-44
USA	1.191	1.278	1.193	1.342	28	12
Meat, frozen	7.404	8.463	13.572	15.459	318	14
of it from Chile	2.303	2.174	3.852	5.247	34	36
Norway	978	1.592	1.475	902	6	-39
Vietnam	1.106	1.790	3.963	6.244	40	58
Supply (Catches + Import)	342.904	556.829	745.980	896.387	100	20
of it catches of quoted species	-	-	-	-	-	0
import from third countries	342.904	556.829	745.980	896.387	100	20
of it from Vietnam	132.171	349.609	522.434	696.426	78	33
Tanzania	66.938	61.043	63.606	52.805	6	-17
Uganda	56.299	52.168	48.782	37.881	4	-22
China	2.908	9.114	18.388	23.856	3	30
Kasachstan	12.405	11.697	13.180	15.614	2	18
Thailand	7.634	10.331	10.227	10.398	1	2
Kenia	12.416	10.974	13.182	10.238	1	-22
Russia	21.618	17.956	15.438	9.502	1	-38

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

b) Incl. quantities not listed above.- c) EU (25).- d) EU (27).-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.14 Origin of imports into EU from third countries for surimi a)

Origin b)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 c)	2006 d)	2007 d)	2008 d)	2008	08/07
Surimi, frozen	164.124	175.082	189.726	184.749	100	-3
of it from USA	90.552	81.268	82.396	77.952	42	-5
Chile	36.996	46.576	51.643	25.733	14	-50
Vietnam	380	7.831	22.561	52.243	28	132
Thailand	5.544	9.369	8.586	11.880	6	38
Argentina	5.474	3.304	4.531	3.841	2	-15
India	1.426	3.220	1.104	5.796	3	425
China	4.378	5.282	2.949	5.930	3	101
Surimipresentation, frozen	219.259	222.003	225.163	212.028	100	-6
of it from China	74.566	87.228	86.765	81.075	38	-7
Thailand	73.422	69.271	76.751	72.590	34	-5
India	19.860	23.111	21.494	33.043	16	54
South Korea	26.996	17.133	15.733	11.654	5	-26
Malaysia	17.046	16.651	13.951	6.460	3	-54
Russia	87	524	3.410	386	0	-89
Peru	1.424	3.078	2.829	3.620	2	28
Japan	1.350	1.295	1.344	984	0	-27
Supply (Catches + Import)	382.971	396.871	414.652	396.649	96	-4
of it catches of quoted species	-	-	-	-	-	0
import from third countries	382.971	396.871	414.652	396.649	96	-4
of it from China b)	78.943	92.510	89.714	87.006	22	-3
Thailand	78.966	78.640	85.337	84.470	21	-1
USA b)	91.940	82.308	83.207	78.590	20	-6
Vietnam	380	7.934	22.589	52.475	5	132
India	21.285	26.331	22.598	38.840	5	72
Chile	37.223	46.678	51.643	25.733	12	-50
South Korea	27.297	17.378	15.733	11.700	4	-26
Malaysia	17.342	17.002	14.192	6.588	3	-54
Peru b)	1.538	3.967	3.357	4.444	1	32
Argentina	5.474	3.304	4.636	3.841	1	-17
Russia	171	524	3.674	643	1	-82
Faroe Isles	15.006	13.571	14.786	-	4	-100

Notes: a) Selected countries, which are most important for EU supply with surimi and surimipresentation.-

b) Incl. quantities not listed above.- c) EU (25).- d) EU (27).-

Source: Eurostat-Comext; EU catch report.-

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

Origin a)	Quantity (tons live weight)				Share (%)	Change (%)
	2005 e)	2006 f)	2007 f)	2008 f)	2008	08/07
Live b)	-	-	647	222	100	-66
Whole, fresh	23.631	8.674	9.233	8.168	100	-12
of it White Tuna (Th. alalunga)	1.071	1.066	1.310	1.296	100	-1
of it from Ecuador	-	-	647	222	17	-66
of it Yellow Tuna (Th. albacares)	21.085	6.535	6.728	6.058	100	-10
of it from Sri Lanka	427	691	926	1.669	28	80
of it Bonito	323	279	180	45	100	-75
of it Big-eye Tuna (Th. obesus)	223	175	122	64	100	-48
of it Red Tuna b)	665	561	819	566	100	-31
of it other Tuna species	265	58	74	140	100	89
Whole, frozen	222.726	206.723	238.574	220.708	100	-7
of it White Tuna (Th. alalunga)	21.443	13.558	31.129	30.346	100	-3
of it from South Africa	4.360	2.461	4.876	9.047	30	86
USA	5.380	1.869	7.099	7.085	23	0
Thailand	261	-	6.302	3.170	10	-50
of it Yellow Tuna (Th. albacares)	127.148	119.058	148.570	135.156	100	-9
of it from Thailand	3.638	15.132	26.286	22.817	17	-13
Phillipines	3.502	2.877	17.881	15.351	11	-14
Panama	15.636	17.599	13.835	13.837	10	0
Mexico	7.896	775	7.428	11.458	8	54
Kap Verde	3.791	10.516	23.207	7.306	5	-69
of it Bonito	62.353	65.753	48.340	42.154	100	-13
of it from Panama	16.951	19.636	20.140	9.254	22	-54
Guatemala	7.138	7.809	8.426	9.246	22	10
Kap Verde	2.503	3.534	4.440	4.116	10	-7
of it Big-eye Tuna (Th. obesus)	6.919	4.509	7.475	10.518	100	41
of it from Ecuador	2.793	515	2.355	5.132	49	118
of it Red Tuna b)	3	0	9	63	100	585
of it other Tuna species	4.859	3.844	3.051	2.471	100	-19
of it from Panama	1.594	898	1.305	1.345	54	3
Fillets, fresh d)	16.698	26.089	23.667	27.687	100	17
of it from Sri Lanka	12.007	18.524	16.983	18.399	66	8
Fillets, frozen	21.767	18.745	25.864	23.246	100	-10
of it from Sri Lanka	3	754	4.910	5.521	24	12
Vietnam	726	1.480	4.792	4.828	21	1
Tuna, prepared	1.342.465	1.410.960	1.417.515	1.420.195	100	0
of it from Ecuador	235.424	264.187	285.646	357.383	25	25
Thailand	196.375	250.455	213.908	199.825	14	-7
Phillipines	113.566	133.370	145.408	151.749	11	4
Mauritius	90.624	127.191	133.575	131.638	9	-1
Seychelles	161.366	169.720	134.341	119.817	8	-11
Ivory Coast	86.250	89.691	103.993	106.857	8	3
Ghana	87.094	77.458	82.385	90.221	6	10
Columbia	37.175	29.215	40.060	61.748	4	54
Supply (Catches + Import)	1.654.274	1.686.197	1.729.913	1.718.580	100	-1
of it catches of EU quoted tuna	43.685	41.094	38.080	46.041	3	21
import from third countries	1.610.589	1.645.103	1.691.833	1.672.539	97	-1
of it from Ecuador c)	243.111	268.463	289.533	367.964	22	27
Thailand c)	203.437	270.816	248.249	226.531	14	-9
Phillipines c)	117.303	136.891	163.553	167.362	10	2
Mauritius c)	91.274	129.215	136.181	134.093	8	-2
Seychelles c)	218.614	208.514	151.214	131.375	8	-13
Ivory Coast c)	89.650	91.119	108.283	110.507	7	2
Ghana c)	101.266	88.683	86.898	100.417	6	16
Columbia c)	42.217	31.482	42.611	63.695	4	49
Vietnam c)	10.276	20.288	32.088	36.185	2	13
Indonesia c)	40.335	27.032	31.016	27.859	2	-10

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.- e) EU (25).- f) EU (27).-

Source: Eurostat-Comext; EU catch report.-

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Tab. 4.16 Overview of the adjusted rates of conversion

	COD		POK		RED		AP		SAL		Freshwater fish		SURIMI	
	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.	adj.	reg.
Whole, fresh		1,17		1,19		1,07		1,16		1,15		1,00		
Whole, frozen	1,50	1,71		1,51		1,93	1,71	1,51		1,15		1,00		
Fillet, fresh of it from China Vietnam	2,90	3,48		2,73		3,37			2,27	2,50		2,22		
Fillet, frozen of it from China Russia USA Vietnam	2,20	2,95	2,22	2,43	2,78	3,00	2,38 3,70 3,70	2,95	2,27	2,50	2,02	2,22		
Meat, fresh												1,92		
Meat, frozen of it from China Vietnam	2,40	2,64		2,12		2,34		2,64			2,02 3,33	2,22		
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 2009

Tab. 5.1 EU-QUOTA BY SPECIES

Species	Code-name	EU (25)		EU (27)				
		2004 t	2005 t	2006 t	2007 t	2008 a) t	Change 08/07 %	Quota '08 by species %
Herring	HER	809.693	962.027	879.145	781.371	784.620	0,4	19,4
Sprat	SPR	671.515	794.566	636.884	655.764	705.066	7,5	17,4
Anchovy	ANE	41.000	38.000	13.000	8.000	8.000	0,0	0,2
Atl. Salmon	SAL	2.415	2.333	2.333	2.221	1.899	-14,5	0,0
Cod	COD	147.201	138.252	142.927	130.461	127.245	-2,5	3,1
Haddock	HAD	82.417	78.535	71.678	78.152	69.179	-11,5	1,7
Saithe	POK	125.171	97.265	85.596	84.708	90.310	6,6	2,2
Pollack	POL	20.154	19.859	17.988	17.980	17.980	0,0	0,4
Norway pout	NOP	223.000	5.000	75.250	5.000	115.000	2200,0	2,8
Blue whiting	WHB	757.500	901.257	488.138	409.613	420.784	2,7	10,4
Greater forkbeard	GFB	-	2.394	2.390	2.143	2.551	19,0	0,1
Whiting	WHG	47.651	48.653	48.511	50.861	40.496	-20,4	1,0
Hake b)	HKE	45.050	53.568	57.961	67.065	71.646	6,8	1,8
Jack&horse macke.	JAX	236.055	235.239	242.775	250.765	286.125	14,1	7,1
Mackerel	MAC	365.924	320.768	313.800	139.687	374.063	167,8	9,3
Europ. Plaice	PLE	84.089	79.775	78.744	73.545	72.202	-1,8	1,8
Common sole	SOL	30.426	32.668	34.357	32.804	30.618	-6,7	0,8
Soles	SOX	1.520	1.216	1.216	1.216	1.216	0,0	0,0
Megrim	LEZ	27.026	27.456	28.704	28.618	26.418	-7,7	0,7
Anglerfish nei	ANF	39.540	49.957	56.019	59.723	58.166	-2,6	1,4
Penaeus shrimps	PEN	4.000	4.000	4.000	4.108	4.108	0,0	0,1
North deep prawn	PRA	25.338	21.726	26.702	24.661	26.814	8,7	0,7
Norway lobster	NEP	56.267	63.096	81.369	90.214	90.229	0,0	2,2
Atl. Redfish	RED	60.176	79.764	54.468	34.620	32.205	-7,0	0,8
Greenland halibut	GHL	18.803	17.196	16.965	16.146	17.848	10,5	0,4
Atl. Halibut	HAL	1.200	1.200	1.200	1.200	1.200	0,0	0,0
other species	OTH	12.210	8.210	8.210	8.210	6.110	-25,6	0,2
Sandeels	SAN	902.200	665.960	300.000	178.238	360.000	102,0	8,9
Blue ling & ling	B/L	3.240	3.240	3.065	3.065	3.065	0,0	0,1
Blue ling	BLI	3.850	3.281	3.226	2.628	2.315	-11,9	0,1
Ling	LIN	19.867	20.161	20.160	16.338	14.661	-10,3	0,4
Flat fish	FLX	1.000	600	450	300	300	0,0	0,0
Capelin	CAP	95.985	50.050	16.170	-	-	-	-
Catfish	CAT	-	-	-	-	-	-	-
Witch flunder	WIT	-	-	-	-	-	-	-
American plaice	PLA	-	-	-	-	-	-	-
Yellow tail flounder	YEL	290	-	-	-	-	-	-
Roundnose grenad.	RNG	10.576	15.373	15.701	12.000	12.221	1,8	0,3
Industry fish	I/F	800	800	800	800	800	0,0	0,0
Skates (NAFO)	SKA	-	-	-	-	-	-	-
Turbot / Brill	T/B	4.877	4.550	4.229	5.263	5.263	0,0	0,1
Skates (ICES)	SRX	3.503	11.720	11.237	10.690	10.143	-5,1	0,3
Dab / Flunder	D/F	19.551	18.000	17.100	17.100	18.810	10,0	0,5
Lemon Sole/Witch Flunder	L/W	7.023	6.500	6.175	6.175	6.793	10,0	0,2
Northern blue fin tuna	BFT	18.450	18.331	18.301	16.780	16.211	-3,4	0,4
Albacore	ALB	43.043	51.967	42.735	44.983	38.965	-13,4	1,0
Bigeye tuna	BET	35.937	44.475	46.508	31.500	31.350	-0,5	0,8
Swordfish	SWO	12.691	14.666	12.540	13.598	12.767	-6,1	0,3
Picked dogfish	DGS	4.472	-	961	3.619	2.585	-28,6	0,1
Black scabbardfish	BSF	7.383	11.357	7.220	7.351	12.448	69,3	0,3
Greater argentine	ARU	7.813	-	6.641	6.758	6.758	0,0	0,2
Tusk (=Cusk)	USK	1.155	996	996	809	887	9,6	0,0
Orange roughy	ORY	1.437	1.338	1.338	314	214	-31,8	0,0
Blackspot(=red)seabream	SBR	2.757	2.514	2.514	2.515	2.629	4,5	0,1
Deep Sea Sharks	DWS	-	-	-	2.637	1.927	-26,9	0,0
inserted species	VFF	-	-	-	-	-	-	-
Total:		5.143.241	5.029.859	4.008.397	3.442.317	4.043.210	17,5	100,0

Tab. 5.1 EU-QUOTA BY SPECIES

Species	Code-name	EU (25)		EU (27)				
		2004 t	2005 t	2006 t	2007 t	2008 a) t	Change 08/07 %	Quota '08 by species %
of which: (COD, POK, HAD, HKE, RED)		460.015	447.384	412.630	395.006	390.585	-1,1	9,7

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

Source: EU, TAC regulations.-

Published by: AIPCE 2009

Tab. 5.2 EU-CATCHES BY QUOTED SPECIES

Species	Code-name	EU (25)		EU (27)			Change 08/07 %	Quota'08 by spec. % b)
		2004 t	2005 t	2006 t	2007 t	2008 a) t		
Herring	HER	727.994	838.966	754.227	612.452	559.044	-8,7	71,3
Sprat	SPR	589.517	649.235	483.869	458.193	430.007	-6,2	61,0
Anchovy	ANE	21.826	5.514	5.812	5.571	3.298	-40,8	41,2
Atl. Salmon	SAL	1.644	1.071	849	763	606	-20,6	31,9
Cod	COD	139.213	125.135	131.149	133.126	117.396	-11,8	92,3
Haddock	HAD	61.850	59.808	51.727	48.439	47.133	-2,7	68,1
Saithe	POK	50.811	55.461	67.741	57.629	64.904	12,6	71,9
Pollack	POL	5.959	6.230	6.229	5.914	5.581	-5,6	31,0
Norway pout	NOP	11.468	40	38.667	87	30.963	35.489,7	26,9
Blue whiting	WHB	345.849	434.714	399.764	315.708	227.444	-28,0	54,1
Greater forkbeard	GFB	-	1.855	1.777	1.621	1.882	16,1	73,8
Whiting	WHG	27.725	30.187	31.478	31.483	25.839	-17,9	63,8
Hake c)	HKE	40.753	43.685	41.094	38.080	46.041	20,9	64,3
Jack&horse macke.	JAX	227.101	208.297	203.199	183.455	191.936	4,6	67,1
Mackerel	MAC	423.277	285.771	272.934	170.054	320.946	88,7	85,8
Europ. Plaice	PLE	76.703	68.058	71.071	64.434	62.098	-3,6	86,0
Common sole	SOL	28.560	27.107	23.242	25.029	24.353	-2,7	79,5
Soles	SOX	820	888	687	493	532	8,0	43,8
Megrim	LEZ	18.013	17.282	15.563	14.959	14.997	0,3	56,8
Anglerfish nei	ANF	38.459	43.989	42.580	46.550	43.986	-5,5	75,6
Penaeus shrimps	PEN	3.325	2.943	2.229	2.362	1.496	-36,7	36,4
North deep prawn	PRA	13.874	8.708	12.675	11.884	11.612	-2,3	43,3
Norway lobster	NEP	50.798	56.346	62.081	67.468	65.554	-2,8	72,7
Atl. Redfish	RED	31.261	29.371	28.030	19.832	17.071	-13,9	53,0
Greenland halibut	GHL	15.370	14.351	13.406	15.116	15.191	0,5	85,1
Atl. Halibut	HAL	143	72	78	65	53	-18,3	4,4
other species	OTH	7.223	4.273	4.445	4.928	4.915	-0,3	80,4
Sandeels	SAN	336.276	164.658	292.389	179.344	277.313	54,6	77,0
Blue ling & ling	B/L	2.374	2.082	1.765	2.643	1.723	-34,8	56,2
Blue ling	BLI	3.586	3.094	2.878	2.396	1.866	-22,1	80,6
Ling	LIN	10.367	10.158	9.543	8.148	8.406	3,2	57,3
Flat fish	FLX	160	123	141	89	89	-0,4	29,5
Capelin	CAP	-	-	-	-	-	-	-
Catfish	CAT	437	436	223	71	170	138,9	-
Witch flunder	WIT	1.178	626	1.073	280	386	37,8	-
American plaice	PLA	1.146	818	833	949	984	3,6	-
Yellow tail flounder	YEL	357	353	445	666	677	1,6	-
Roundnose grenad.	RNG	4.587	9.969	10.283	7.812	5.337	-31,7	43,7
Industry fish	I/F	558	799	84	422	757	79,4	94,6
Skates (NAFO)	SKA	8.184	785	495	152	136	-10,5	-
Turbot / Brill	T/B	4.339	4.263	3.949	4.576	3.804	-16,9	72,3
Skates (ICES)	SRX	2.044	5.616	6.475	6.700	8.063	20,3	79,5
Dab / Flunder	D/F	12.874	13.779	13.918	12.890	10.848	-15,8	57,7
Lemon Sole/Witch Flunder	L/W	3.617	3.551	3.501	3.716	3.550	-4,5	52,3
Northern blue fin tuna	BFT	17.176	22.053	19.393	22.513	11.153	-50,5	68,8
Albacore	ALB	17.069	35.115	29.592	17.873	18.492	3,5	47,5
Bigeye tuna	BET	13.111	17.667	9.247	8.238	6.550	-20,5	20,9
Swordfish	SWO	9.971	11.752	11.956	11.996	10.146	-15,4	79,5
Picked dogfish	DGS	1.137	-	251	1.956	790	-59,6	30,6
Black scabbardfish	BSF	5.983	9.563	5.077	5.771	9.716	68,4	78,1
Greater argentine	ARU	5.791	-	1.287	4.043	3.026	-25,1	44,8
Tusk (=Cusk)	USK	534	579	635	552	620	12,2	69,8
Orange roughy	ORY	530	387	585	372	104	-72,0	48,7
Blackspot(=red)seabream	SBR	1.507	1.772	1.376	1.619	1.553	-4,1	59,1
Deep Sea Sharks	DWS	-	-	-	1.745	1.342	-23,1	69,6
unserted species	VFF	333	333	333	44	132	199,8	-
Total:		3.182.878	3.339.688	3.194.330	2.643.271	2.722.608	3,0	67,3

Tab. 5.2 EU-CATCHES BY QUOTED SPECIES

Species	Code-name	EU (25)		EU (27)				
		2004 t	2005 t	2006 t	2007 t	2008 a) t	Change 08/07 %	Quota'08 by spec. % b)
of which: (COD, POK, HAD, HKE, RED)		323.888	313.460	319.741	297.106	292.544	-1,5	74,9

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

Source: EU catch report
Published by: AIPCE 2009

Tab. 13.1 IMPORT OF FROZEN FILLETS AND MEAT OF ALASKA-POLLOCK AND HAKE FROM THIRD COUNTRIES INTO EU (25)

Average import price €/KG; without duty) in 2006

Month	1	2	3	4	5	6	7	8	9	10	11	12
Alaska-Pollock												
Fillets a), frozen: Total import	2,02	1,99	2,03	2,06	2,08	2,03	2,02	2,04	2,01	1,99	1,95	1,97
from it: Germany	2,00	2,01	2,07	2,10	2,12	2,07	2,04	2,08	2,04	2,03	2,03	2,06
France	2,14	2,09	2,17	2,16	2,09	2,02	1,97	2,03	2,05	2,14	2,08	2,03
UK	2,22	2,20	2,20	2,10	2,25	2,09	2,05	2,30	2,18	2,38	2,03	2,28
NL	2,26	2,27	2,29	2,28	2,27	2,23	2,30	2,25	2,23	2,17	2,23	2,13
Spain	2,06	1,80	1,89	2,10	2,00	1,83	2,47	1,98	1,93	1,98	1,81	1,69
Denmark	2,26	2,34	2,11	2,26	2,27	2,45	2,40	2,56	2,29	2,38	2,56	2,33
Belgium	2,04	2,16	2,02	2,07	2,14	2,11	2,09	2,01	2,02	2,15	2,09	1,99
Sweden	2,20	2,00	2,18	2,21	2,30	2,03	1,92	2,08	2,10	2,08	2,27	2,20
Poland	1,63	1,60	1,57	1,60	1,55	1,47	1,57	1,47	1,49	1,42	1,47	1,40
Meat b), frozen: Total import	1,38	1,30	1,39	1,53	1,51	1,43	1,50	1,45	1,45	1,43	1,45	1,45
from it: Germany	1,40	1,29	1,39	1,53	1,45	1,42	1,46	1,40	1,43	1,38	1,47	1,45
France	1,42	1,43	1,53	1,64	1,51	1,42	1,48	1,40	1,44	1,45	1,39	1,45
UK	1,29	1,24	1,29	1,42	1,42	1,40	1,46	1,32	1,39	1,40	1,47	1,45
NL	-	1,42	1,38	0,72	-	1,40	-	1,60	1,57	1,61	1,56	1,56
Spain	-	2,01	-	-	2,28	2,61	2,13	2,58	2,61	1,87	2,48	1,48
Denmark	-	-	-	-	-	-	-	0,53	-	-	-	-
Poland	1,47	1,27	1,43	0,90	1,55	1,52	-	1,22	1,17	-	1,22	1,19
Hake												
Fillets c), frozen: Total import	2,30	2,42	2,58	2,65	2,76	2,76	2,56	2,71	2,69	2,77	2,73	2,52
from it: Germany	1,85	2,21	2,08	2,27	2,26	2,22	2,10	2,20	2,15	2,30	2,15	2,08
France	2,22	2,42	2,30	2,61	2,73	2,50	2,50	2,91	2,72	2,63	2,77	2,46
UK	3,45	3,45	2,49	3,16	3,26	3,23	2,91	3,20	3,09	3,12	3,25	2,95
NL	2,67	2,55	2,69	2,69	2,58	2,74	2,84	2,76	2,93	2,57	3,12	2,79
Spain	2,21	2,38	2,55	2,60	2,67	2,79	2,56	2,59	2,63	2,89	2,89	2,59
Poland	1,95	1,88	2,01	1,96	2,14	1,62	1,93	1,69	1,74	1,90	1,90	1,96
Italy	2,86	2,85	3,24	3,40	3,36	3,39	3,25	3,70	3,56	3,43	3,13	3,16
Meat d), frozen: Total import	1,55	1,76	1,74	1,89	1,98	1,98	1,83	1,63	1,90	1,87	1,69	1,71
from it: Germany	1,16	1,15	1,12	1,09	1,15	1,03	1,04	1,19	1,13	1,31	1,18	1,34
France	1,12	1,30	0,98	1,08	1,89	1,25	0,98	1,05	1,20	1,44	1,45	1,23
UK	1,17	1,14	1,13	1,16	-	0,78	0,83	1,16	1,23	0,85	0,86	1,64
NL	1,17	-	-	-	-	-	0,99	-	-	1,22	1,00	-
Spain	2,02	1,91	2,01	2,01	2,16	2,22	2,31	1,91	2,11	2,22	1,81	2,07
Poland	-	1,26	-	1,43	-	-	-	1,31	1,34	-	1,39	1,30
Italy	1,83	1,70	1,70	2,34	2,02	1,48	1,89	1,43	1,58	1,64	1,49	1,54

Note: a) CN: 03042085 (pinbone in and boneless).- b) CN: 03049061.- c) CN: 03042055, 03042056 and 03042058 (pinbone in and boneless).- d) CN: 03049048.-

Source: Eurostat-Comext; Published by: AIPCE 2009

Tab. 13.2 IMPORT OF FROZEN FILLETS AND MEAT OF ALASKA-POLLOCK AND HAKE FROM THIRD COUNTRIES INTO EU (27)

Average import price €/KG; without duty) in 2007

Month	1	2	3	4	5	6	7	8	9	10	11	12
Alaska-Pollock												
Fillets a), frozen: Total import	1,96	1,97	1,97	2,05	1,96	1,94	1,95	1,90	1,95	1,87	1,85	1,79
from it: Germany	2,03	2,02	2,04	2,06	1,99	1,97	2,00	1,97	1,98	1,92	1,91	1,87
France	2,03	2,03	2,02	2,07	1,98	1,97	1,92	1,94	2,00	1,94	1,94	1,85
UK	2,07	2,12	2,08	2,33	2,16	2,03	2,13	2,17	2,07	1,96	2,06	2,05
NL	2,17	2,11	2,22	2,10	2,09	2,12	2,09	2,04	2,10	1,97	2,01	1,96
Spain	1,75	1,87	1,98	1,58	1,80	1,65	1,97	1,45	1,50	1,56	1,63	1,64
Denmark	2,20	2,34	2,33	2,25	2,35	2,16	2,53	2,02	2,44	2,44	2,25	2,30
Belgium	1,96	2,11	2,08	2,02	1,78	1,88	1,86	1,94	2,05	1,86	1,88	1,76
Sweden	1,96	2,10	2,12	2,09	2,12	2,06	1,98	2,00	2,03	2,04	1,91	1,89
Poland	1,31	1,34	1,39	1,68	1,41	1,59	1,39	1,33	1,47	1,37	1,36	1,30
Meat b), frozen: Total import	1,41	1,44	1,42	1,44	1,42	1,37	1,35	1,39	1,34	1,31	1,37	1,27
from it: Germany	1,32	1,46	1,40	1,43	1,41	1,40	1,34	1,43	1,35	1,34	1,31	1,30
France	1,38	1,46	1,47	1,42	1,40	1,32	1,35	1,26	1,29	1,25	1,24	1,18
UK	-	-	1,05	1,44	1,67	1,37	1,37	1,33	1,40	1,27	1,52	1,24
NL	-	1,45	1,68	1,61	-	1,63	-	1,67	1,34	1,47	1,37	1,44
Spain	-	1,69	-	-	1,62	1,63	1,51	1,58	1,43	1,68	1,75	-
Denmark	-	-	-	-	-	-	-	1,29	-	-	-	-
Poland	1,04	1,13	1,36	-	0,97	1,04	-	1,42	1,27	-	-	-
Hake												
Fillets c), frozen: Total import	2,49	2,85	2,76	3,05	3,00	2,98	2,93	2,87	3,07	2,84	2,94	2,73
from it: Germany	2,12	2,15	2,16	2,28	2,20	2,26	2,03	1,97	2,18	2,24	2,40	1,98
France	2,67	3,14	2,82	2,62	3,11	2,71	2,79	3,06	2,95	2,67	2,79	3,02
UK	4,08	2,88	3,63	3,62	4,11	3,89	3,60	3,55	3,73	2,69	3,80	3,66
NL	1,88	3,29	2,97	2,95	1,79	2,35	2,99	2,84	2,00	2,47	3,56	2,82
Spain	2,79	2,94	2,86	3,27	3,24	3,17	3,29	3,05	3,28	3,00	3,02	2,89
Poland	1,94	1,93	1,84	2,23	2,36	2,27	2,61	2,01	2,86	2,55	2,27	2,08
Italy	3,17	3,47	3,24	3,72	3,30	3,29	3,46	3,72	3,81	3,43	3,51	3,13
Meat d), frozen: Total import	1,87	1,89	1,86	1,91	2,17	1,87	2,14	2,12	2,17	2,05	2,44	2,24
from it: Germany	1,28	1,33	1,32	1,25	1,21	1,26	1,24	1,22	1,17	1,16	0,98	1,20
France	1,24	1,13	1,27	1,37	1,34	1,26	1,38	1,29	1,23	1,34	1,12	-
UK	-	0,57	1,86	1,05	-	1,04	1,04	1,01	-	1,02	-	-
NL	1,07	-	-	-	-	-	-	-	-	-	-	-
Spain	2,53	2,19	2,08	2,15	2,40	2,30	2,47	2,37	2,62	2,61	3,03	2,56
Poland	-	1,28	-	1,28	-	-	-	1,33	-	-	1,33	1,31
Italy	1,50	1,92	1,69	1,79	2,36	1,71	1,25	2,19	2,47	1,97	3,42	2,07

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 2009

Tab. 13.3 IMPORT OF FROZEN FILLETS AND MEAT OF ALASKA-POLLOCK AND HAKE FROM THIRD COUNTRIES INTO EU (27)

Average import price €/KG; without duty) in 2008

Month	1	2	3	4	5	6	7	8	9	10	11	12
Alaska-Pollock												
Fillets a), frozen: Total import	1,84	1,83	1,85	1,94	1,85	1,87	1,93	1,96	2,14	2,28	2,60	2,56
from it: Germany	1,85	1,86	1,86	1,92	1,92	1,94	2,01	1,99	2,17	2,33	2,63	2,74
France	1,92	1,85	1,94	1,88	1,93	1,94	1,86	2,03	2,35	2,33	2,63	2,70
UK	1,96	1,96	2,08	2,10	2,11	1,98	1,99	1,95	2,16	2,52	2,75	2,36
NL	1,99	1,87	2,11	2,17	2,02	2,16	2,19	2,33	2,63	2,63	3,03	2,92
Spain	1,81	1,84	1,69	1,65	1,61	1,52	1,64	1,77	1,74	1,92	1,98	2,22
Denmark	2,35	2,25	2,23	2,30	2,12	2,35	2,51	2,23	2,53	2,31	2,79	3,02
Belgium	1,82	1,99	1,98	1,90	1,82	1,90	1,77	1,67	2,00	2,02	2,36	2,21
Sweden	1,83	1,90	1,79	1,99	1,92	1,79	1,91	2,06	2,11	2,44	2,79	2,66
Poland	1,39	1,45	1,36	1,67	1,25	1,26	1,37	1,44	1,59	1,57	1,86	1,71
Meat b), frozen: Total import	1,06	1,08	1,00	1,06	0,96	0,86	1,26	1,26	1,35	1,37	1,48	1,59
from it: Germany	1,27	1,24	1,30	1,22	1,26	1,21	1,23	1,27	1,23	1,55	1,59	1,71
France	1,24	1,24	1,18	1,13	1,18	1,31	1,37	1,27	1,68	1,93	2,07	1,89
UK	-	-	-	-	-	-	-	-	-	-	-	-
NL	-	1,29	1,43	1,29	-	1,43	-	1,28	1,22	1,61	1,78	1,94
Spain	-	1,77	-	-	3,23	1,39	1,52	1,75	2,18	2,29	-	-
Denmark	-	-	-	-	-	-	-	-	-	-	-	-
Poland	1,30	1,27	-	-	1,25	1,28	-	1,28	1,25	-	-	-
Hake												
Fillets c), frozen: Total import	2,82	2,21	2,83	2,93	3,02	2,79	3,02	3,14	3,13	3,14	3,21	3,30
from it: Germany	2,16	2,10	2,02	2,31	2,55	2,25	2,40	2,44	2,54	2,61	2,72	2,80
France	2,66	2,66	3,21	3,18	3,05	2,89	3,19	3,29	3,31	3,62	3,76	3,58
UK	3,51	0,25	3,61	3,33	3,50	3,01	3,11	3,73	3,50	3,25	3,27	2,51
NL	3,16	2,79	3,01	3,11	3,42	3,09	3,22	3,31	3,08	3,06	3,51	3,50
Spain	3,01	3,15	3,04	3,02	2,99	2,80	3,10	3,14	2,98	2,94	2,95	3,12
Poland	1,80	2,46	2,14	2,26	2,16	2,05	2,49	2,52	3,03	2,83	2,94	2,76
Italy	3,37	3,35	3,29	3,30	3,55	3,59	3,89	3,81	4,04	3,90	4,15	4,08
Meat d), frozen: Total import	1,94	2,54	2,40	2,55	2,06	2,16	2,13	2,13	2,31	2,17	2,19	2,27
from it: Germany	1,07	1,24	1,20	1,16	1,14	1,19	1,24	1,24	1,30	1,37	1,62	1,58
France	1,04	1,29	1,38	2,65	-	2,71	1,41	2,13	3,04	1,44	1,42	-
UK	-	0,77	-	0,95	-	1,09	1,01	1,12	-	1,08	-	-
NL	-	-	-	-	-	-	-	-	-	-	-	-
Spain	2,77	2,82	2,85	2,85	2,66	2,34	2,50	2,50	2,59	3,04	2,38	2,71
Poland	-	-	-	0,59	-	-	-	-	-	-	2,21	1,45
Italy	2,05	2,41	1,52	2,22	1,99	1,99	2,29	2,62	3,41	1,54	3,16	2,79

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 2009