

The EU Seafood market



Mike Turenhout
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- Visfederatie is member of AIPCE-CEP



30 Billion turnover



3,900 enterprises



128,000 direct employees



9.4 million tonnes/year EU import



2.2 million tonnes/year EU export

- >25 years preparing the finfish study

EU food balance



- Supply seafood in the EU:

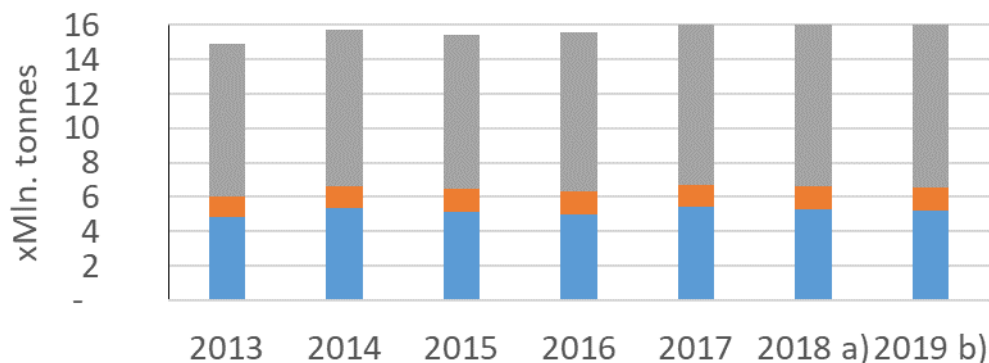
EU domestic supply



EU import



EU seafood supply



Supply 2018:

Import: 9.4 Mln. tonnes
 EU Aquaculture: 1.3 Mln. tonnes
 EU Fisheries: 5.3 Mln. tonnes

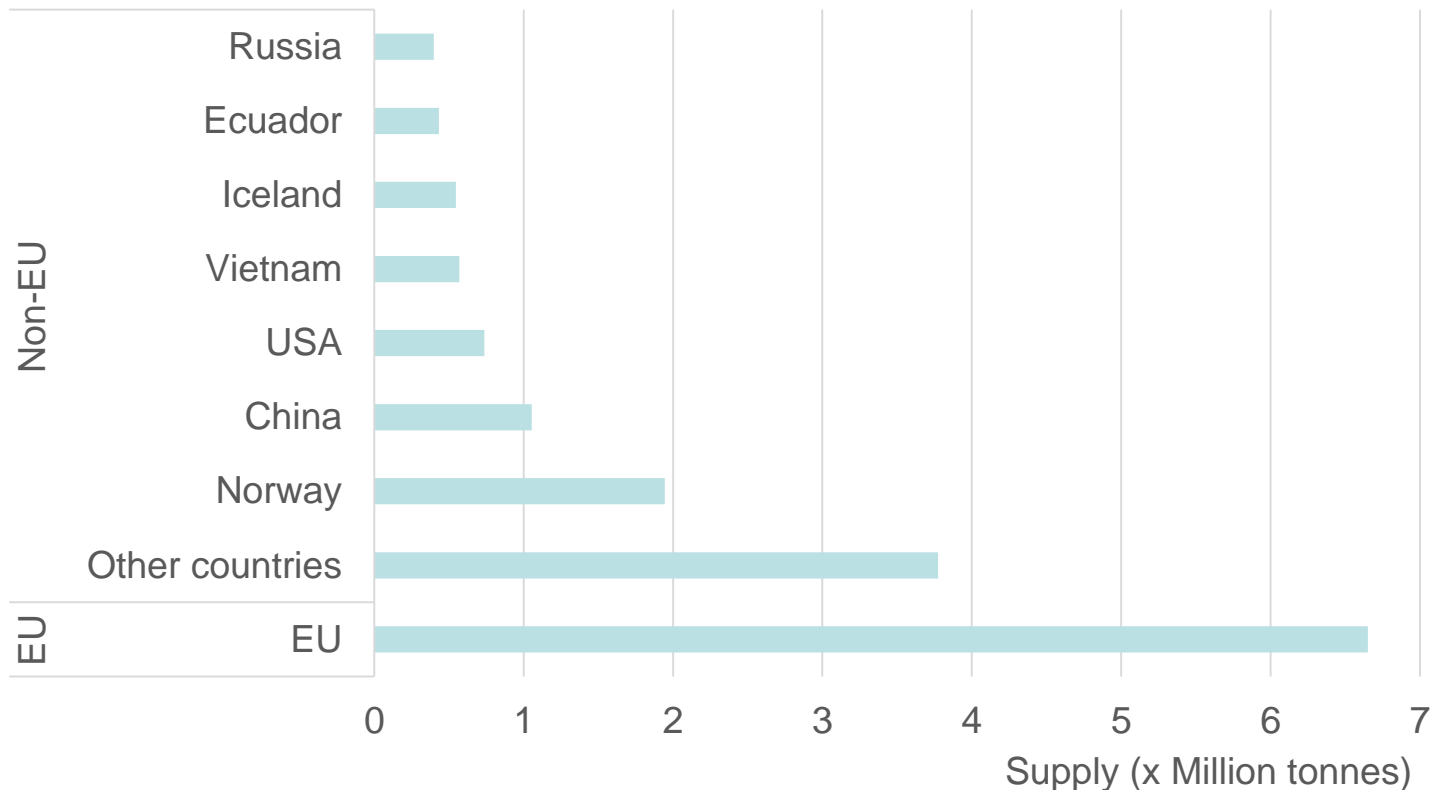
Total: 16.1 Mln. tonnes

■ EU Fisheries ■ EU Aquaculture ■ EU Import (third countries)

EU food balance



EU Seafood supply 2018 (16.1 Million tonnes)



EU supply: 6.7 Mln. tonnes

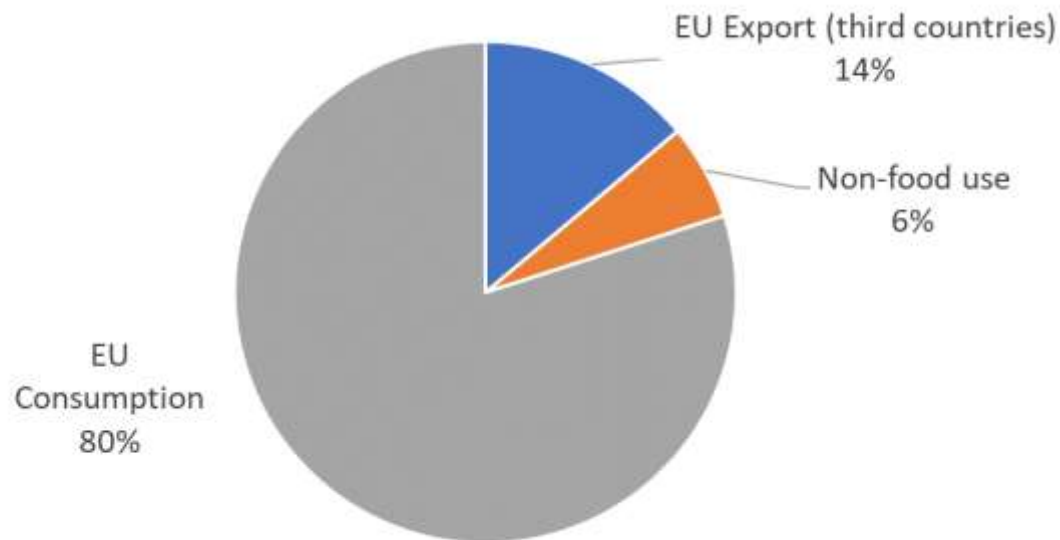
Non-EU supply: 9.4 Mln. tonnes

- Norway: 1.9 Mln. tonnes
- China: 1.1 Mln. tonnes
- USA: 0,7 Mln. tonnes

EU food balance



- Seafood use in the EU:



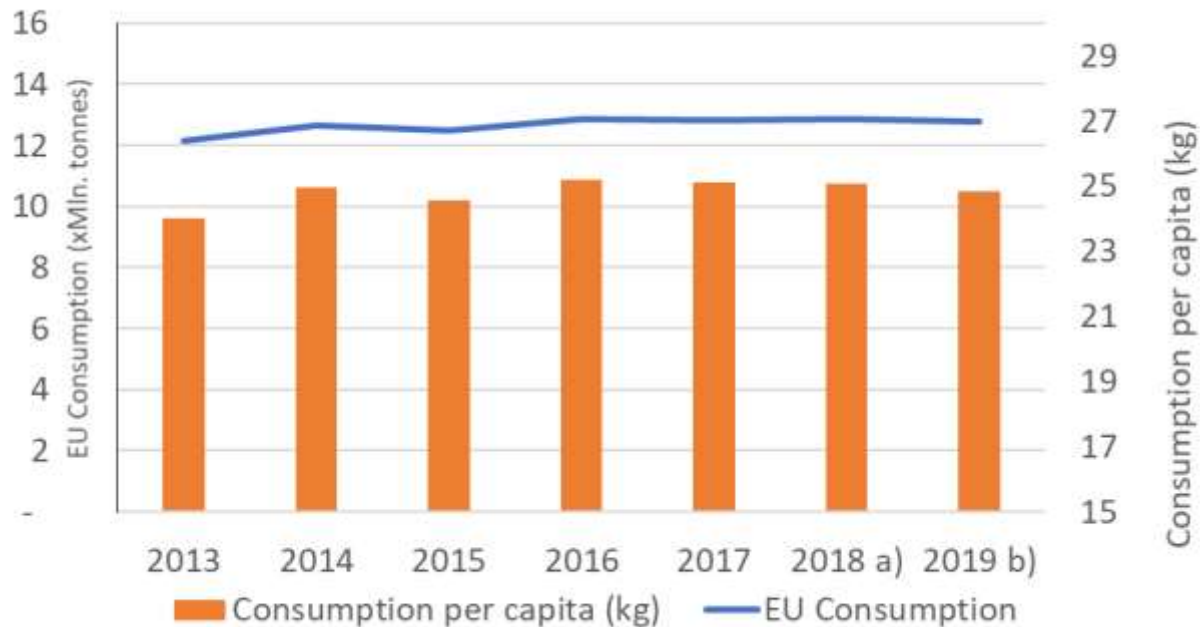
EU Consumption: 12.9 Mln. tonnes
 Non food use: 1.0 Mln. tonnes
 Export: 2.2 Mln. tonnes

Total: 16.1 Mln. tonnes

EU food balance



- EU Seafood consumption:

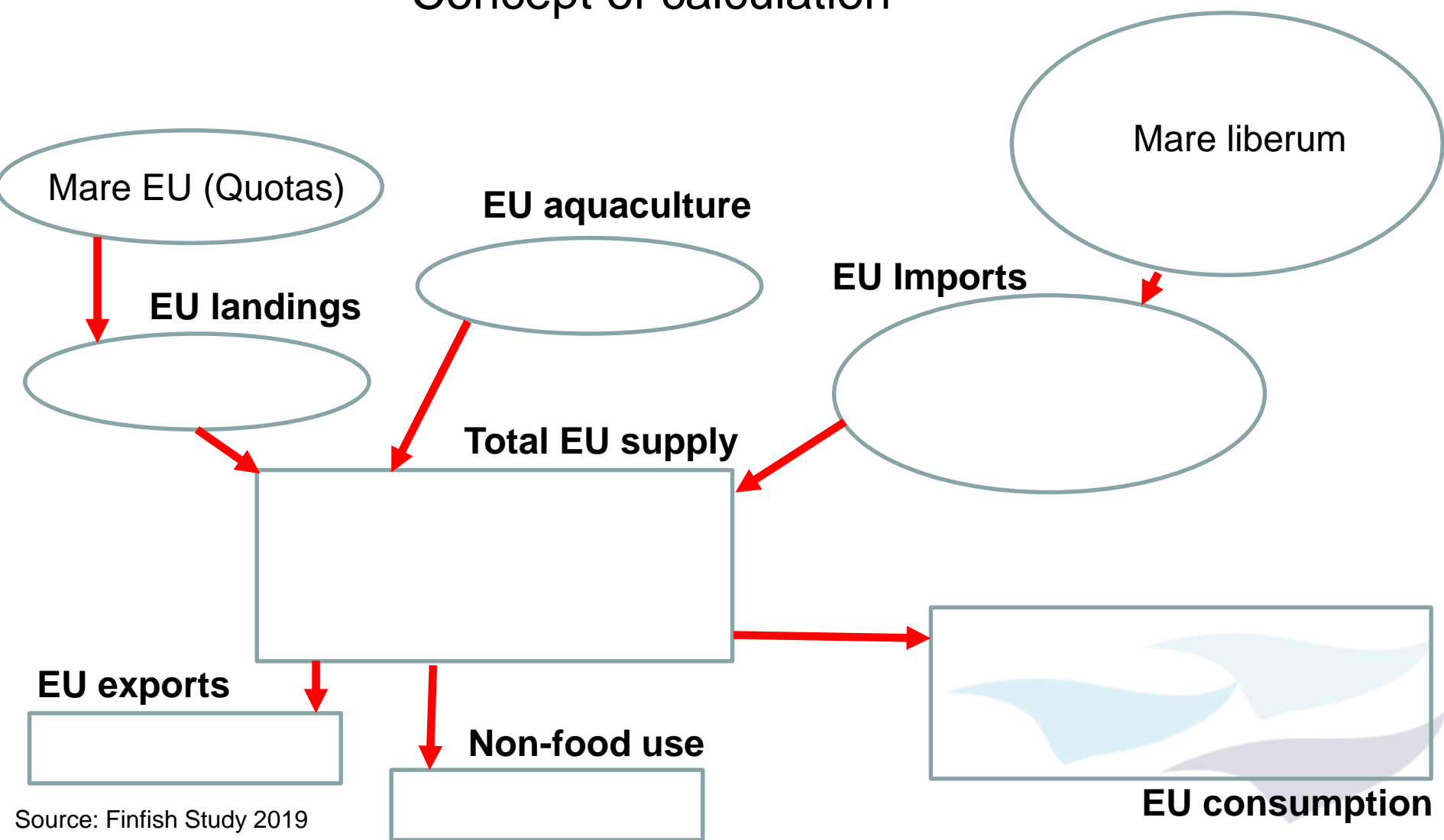


EU Seafood consumption: 12.9 Mln. tonnes
 Consumption per capita: 25,1 kg

Growing competition on seafood worldwide

EU-food balance

- Concept of calculation



Example seafood



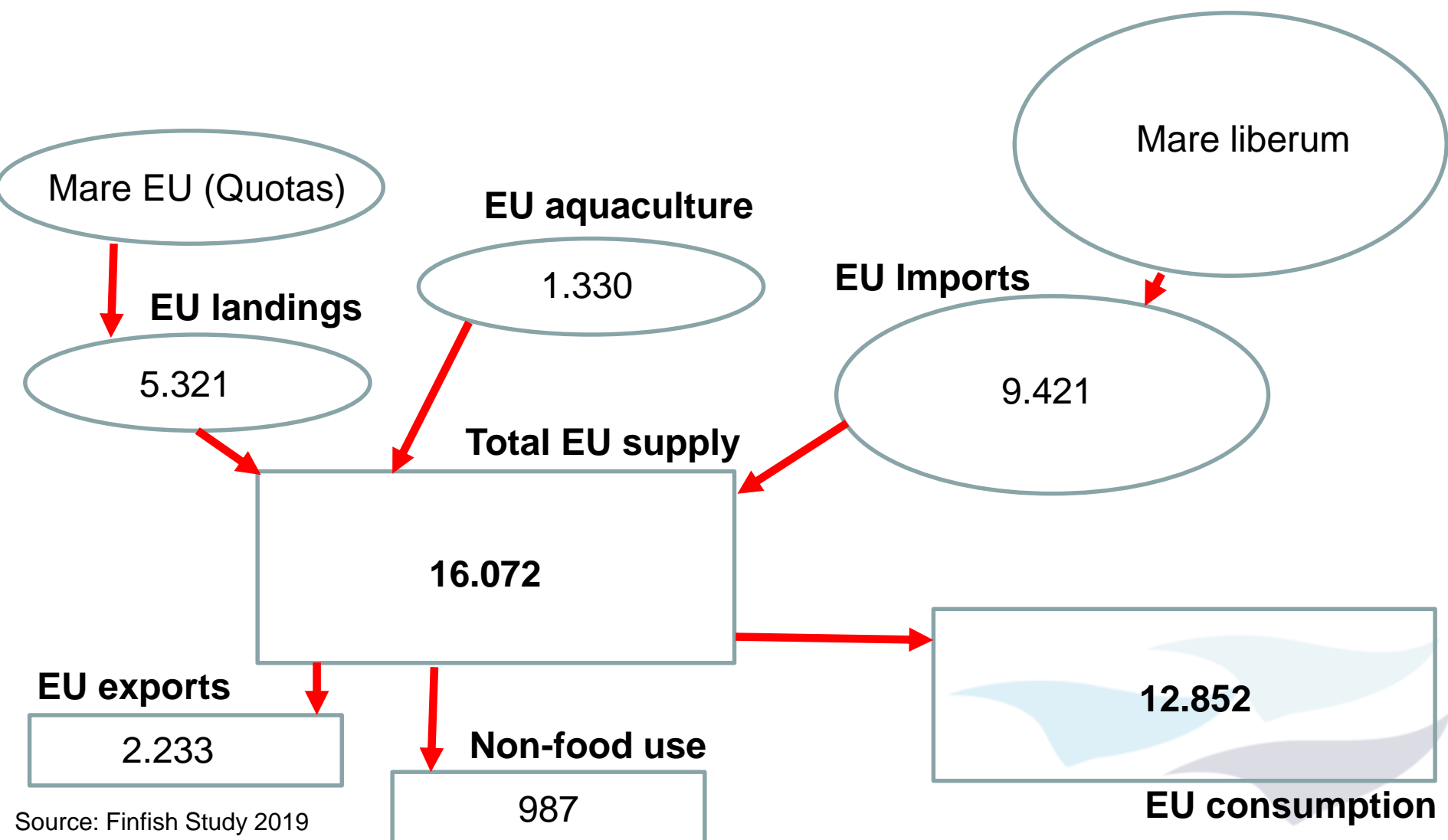
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EU-food balance seafood



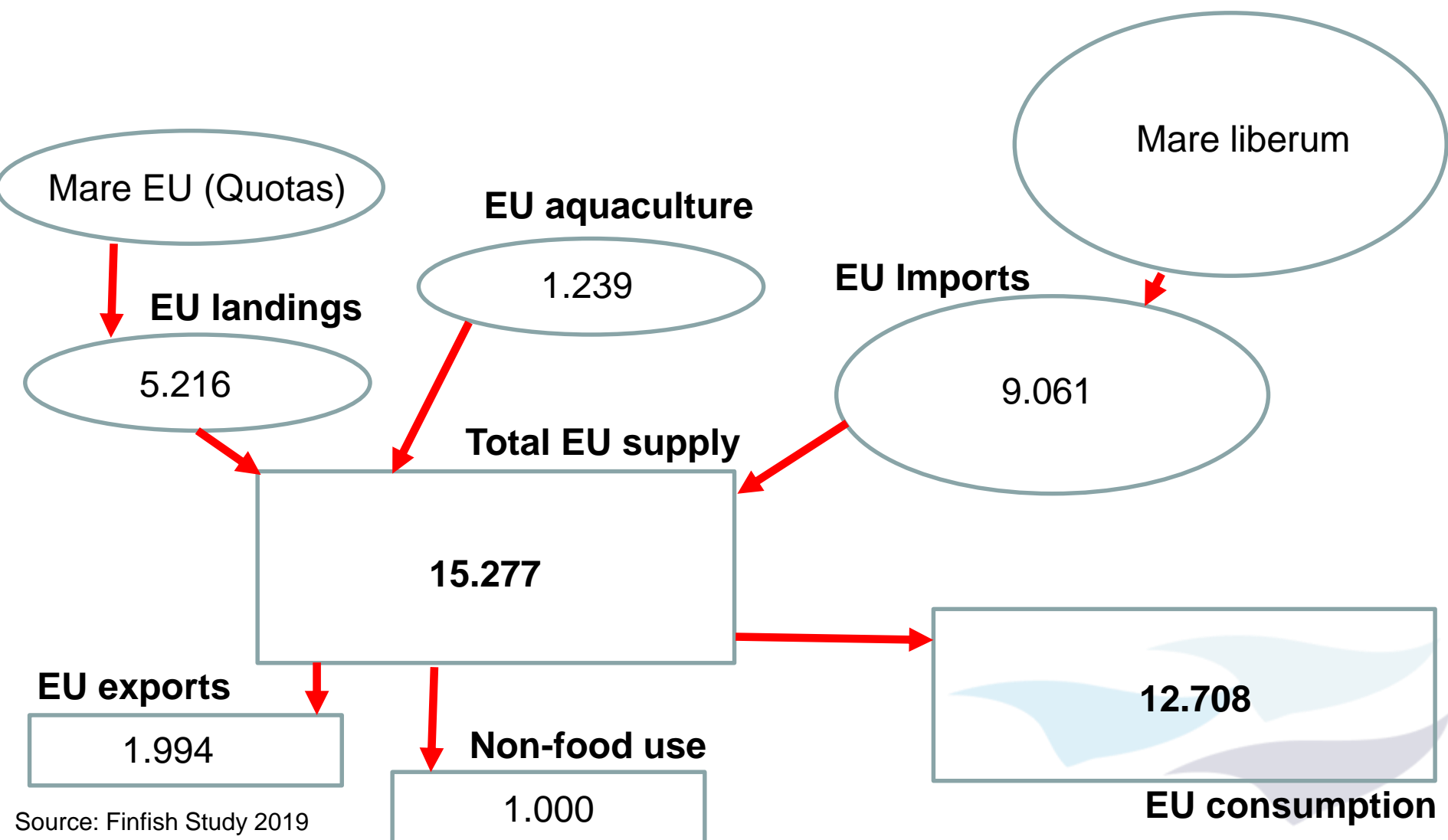
EU-food balance seafood 2018

x1,000 tonnes WFE



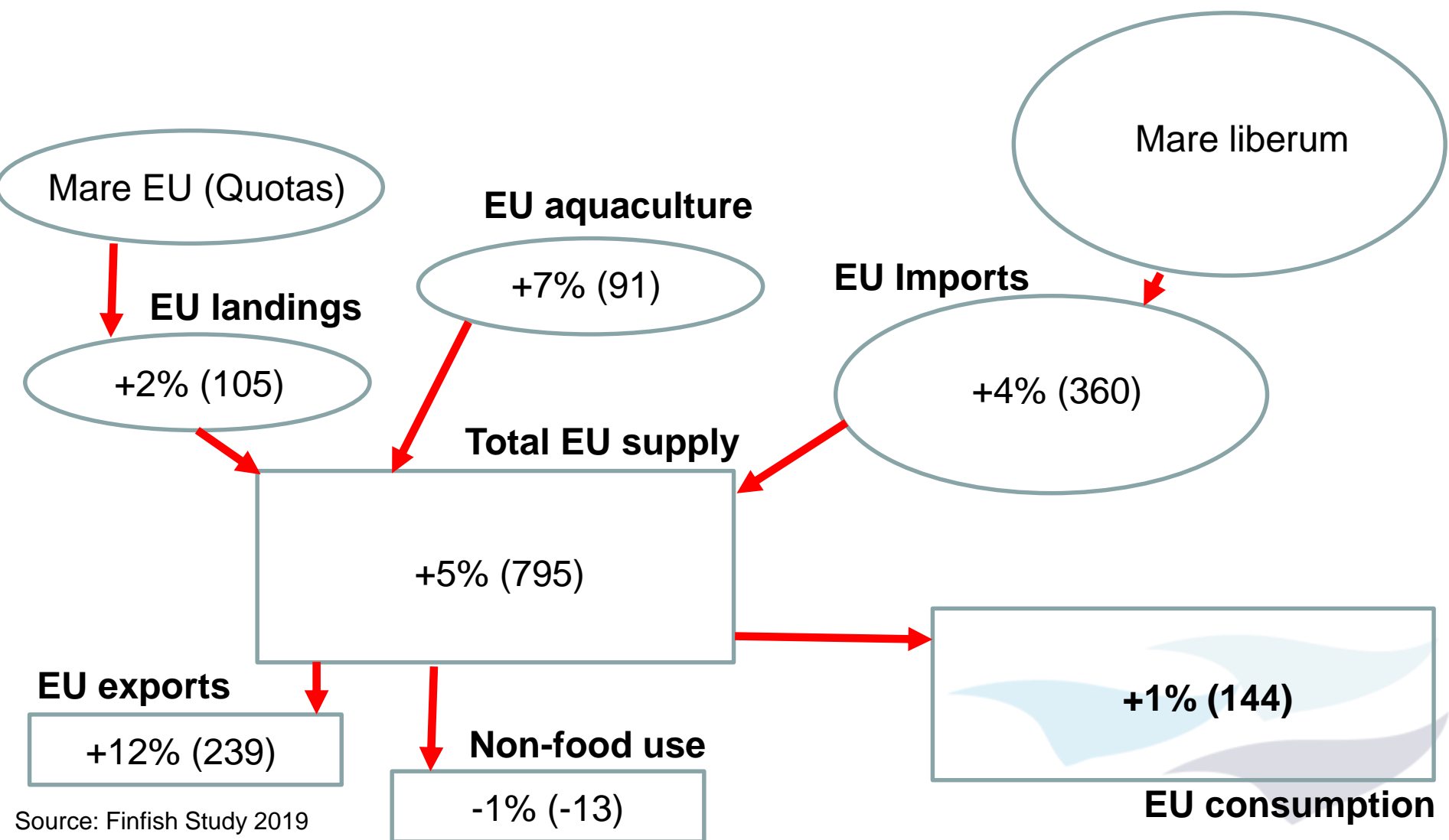
EU-food balance seafood 2008

x1,000 tonnes WFE



EU-food balance seafood 2018/2008

x1,000 tonnes WFE



Example cod



EU-food balance cod



EU-food balance cod



Cod

EU-supply

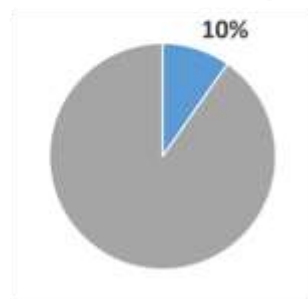
2018
1,173k tonnes (WFE)

Δ (2017-18)
-4%

4 yr-trend



Self-sufficiency



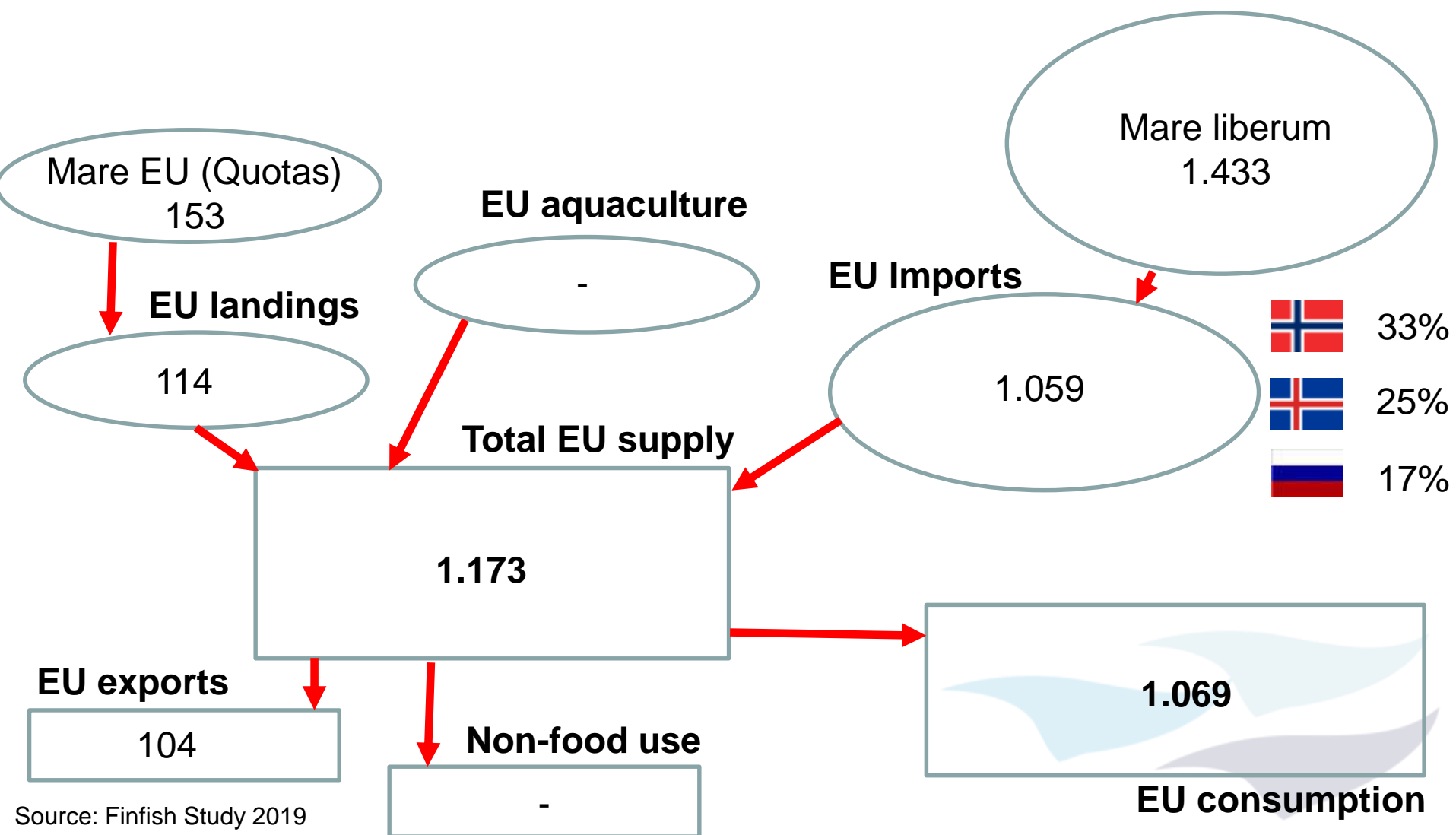
Country of origin

1,059k tonnes (WFE)

	Norway	33%
	Iceland	25%
	Russia	17%

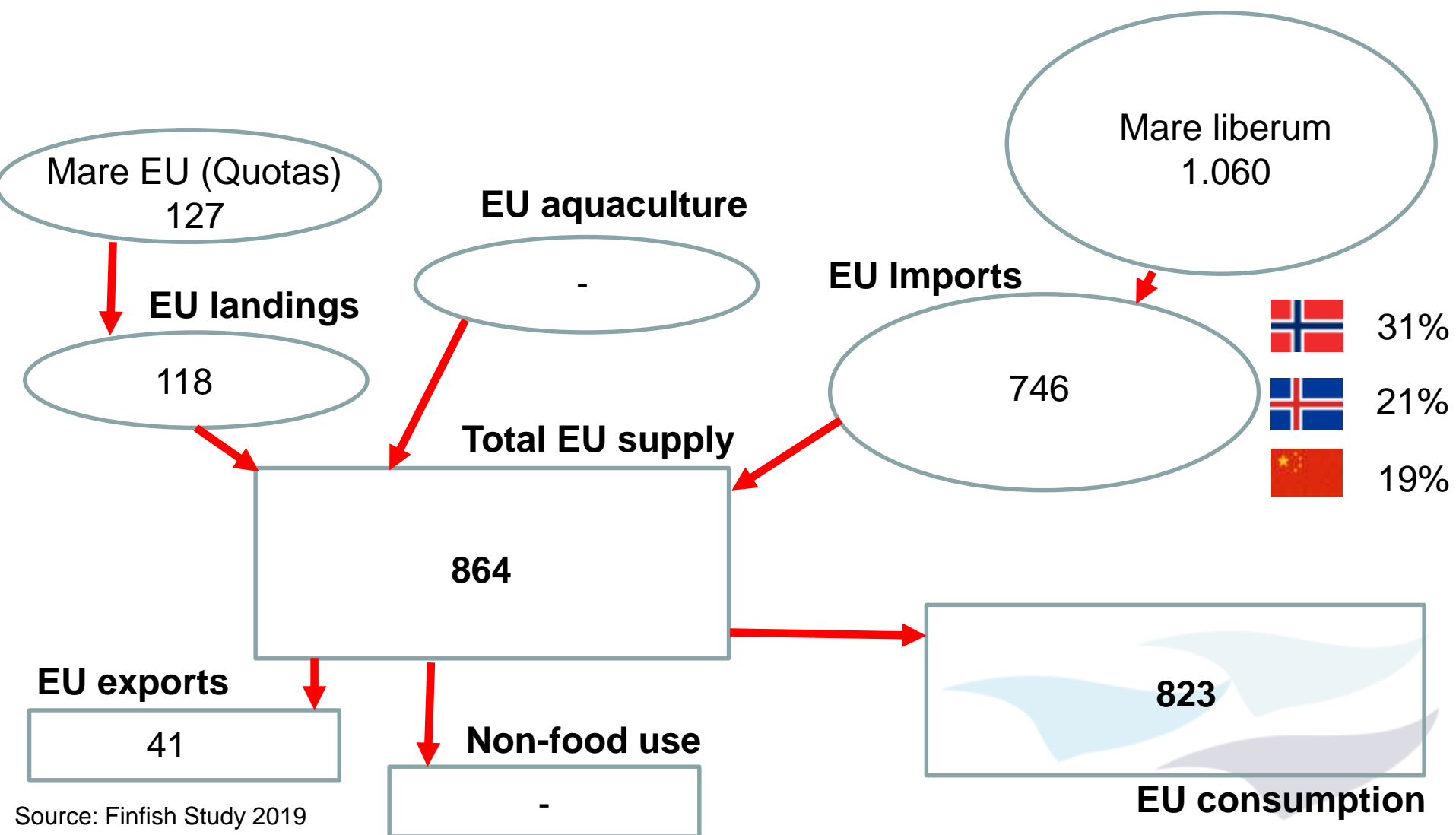
EU-food balance cod 2018

x1,000 tonnes WFE



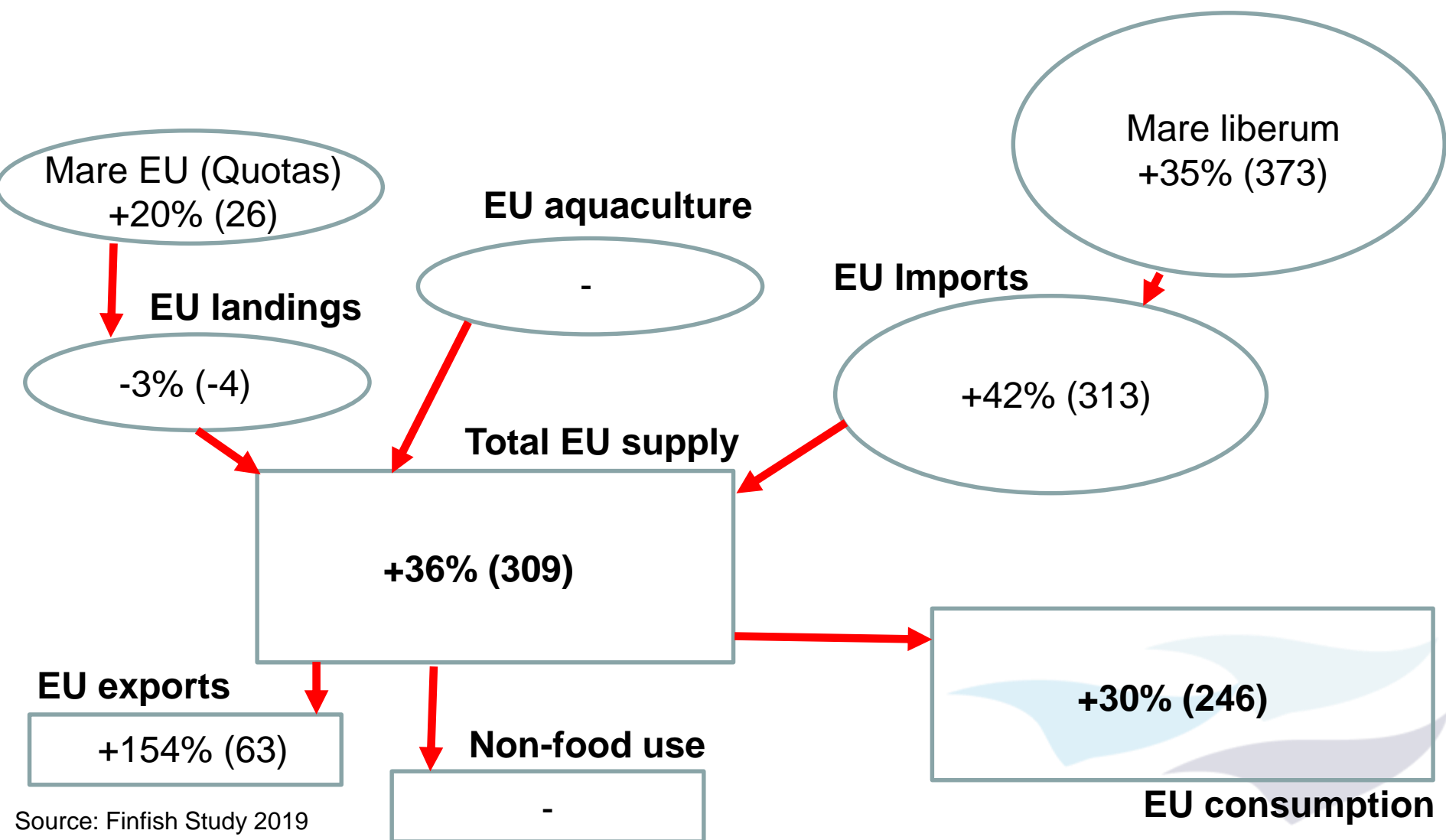
EU-food balance cod 2008

x1,000 tonnes WFE



EU-food balance cod 2018/2008

x1,000 tonnes WFE





An EU food-balance:

- Gives insights in the (changes in) EU-market for seafood product;
- Shows (changes in) EU-supply and consumption
- Gives insights on general level, but also on species level
- Can help in making policy decisions.



EU-food balance



However, there are some uncertainties/challenges

To get a better insight in the EU seafood market more information is desirable on:

- How non-food use is measured
- What the origin is of raw material
- How EU fisheries landings outside EU are included into the food balance
- If the EU conversion factors are still up-to-date
- Other?





MAC has the aim to get more insight in EU market of fish

- *Are we over/underestimating EU consumption?*
- *Do we know where all the fish originally come from?*
- *Are trade agreements effective?*
- *And what about fisheries agreements?*

Can we ask the Commission to give us more information about identified gaps using EUMOFA? If information is not there can we ask the Commission to do additional analyses via EUMOFA? Focus on main product categories?

Thank you for the attention

