



Crab Market Developments

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Focus Group on Brown Crab Draft agenda Thursday, 21
January 2021 10:00 - 12:30 CET Zoom online meeting

Outline

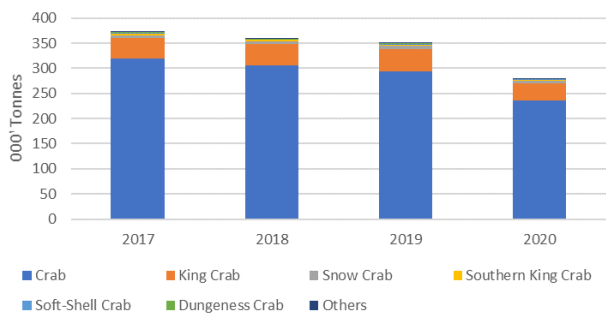
- Analysis of trade data via GTIS database
- Overview global crab trade
- 'Atlantic' crab trade
- 'Brown' crab trade
- Conclusion

Methodology

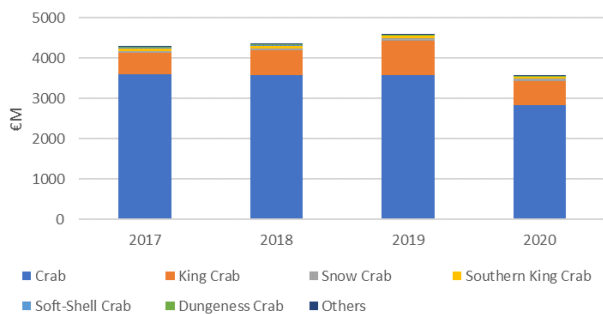
- Species
 - Products assessed at 8-digit tariff code level
 - International variation
 - Global level codes consistent at 6-digit level
 - (Crabs, Including In Shell, Frozen HS Code 030614)
 - Exact species detailed at 8-10-digit level
 - Here, brown crab not specified, assumptions required
- Exports vs imports
 - Sum exports doesn't always = sum imports
 - Variations in methodologies within national statistical agencies
 - Export data used to assess exports and imports
- Double counting
 - Data counts all exports so intermediate trading inflated total values
 - Net exports calculated subtracting imports from exports
- 2020
 - Data for 10 months only – up to October

Global Crab Trade

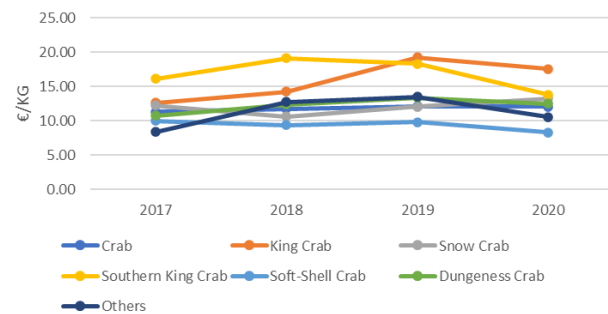
Total Crab Export Volumes - Species



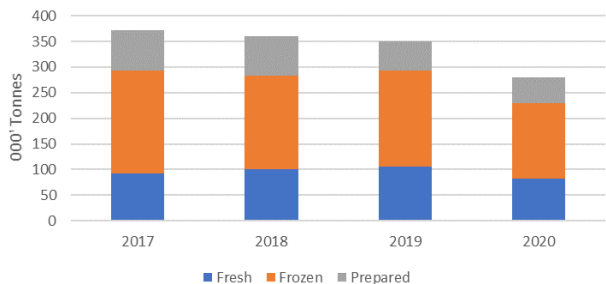
Total Crab Export Values - Species



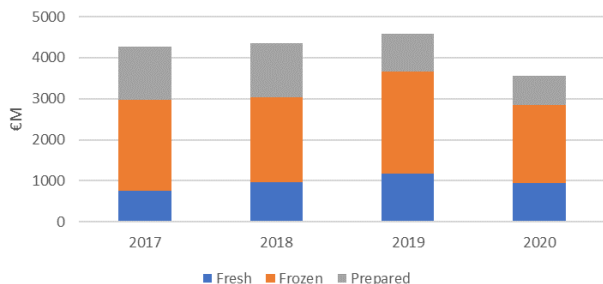
Crab Export Prices - Species



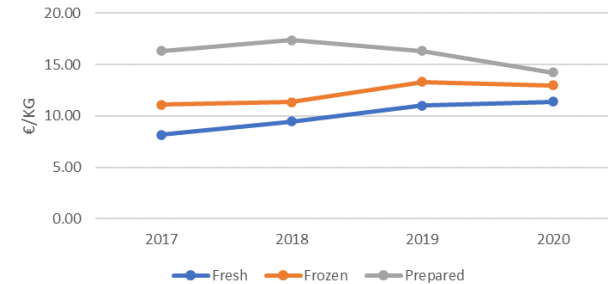
Total Crab Export Volumes - Form



Total Crab Export Values - Form

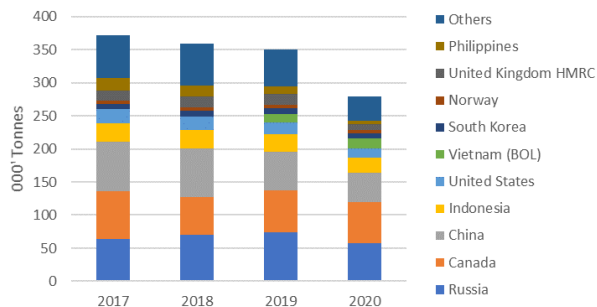


Crab Export Prices - Form

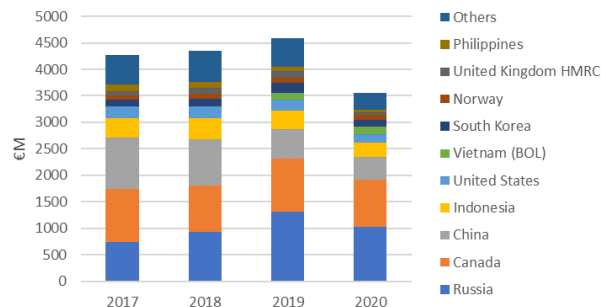


Global Crab Trade

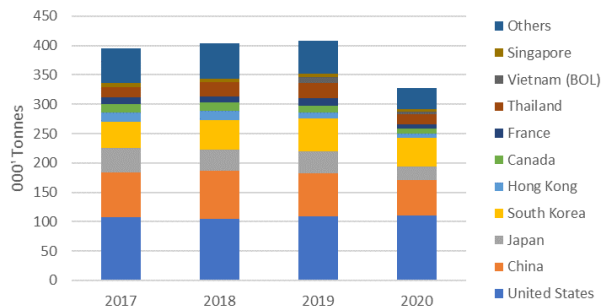
Top 10 Exporters Crab Volume



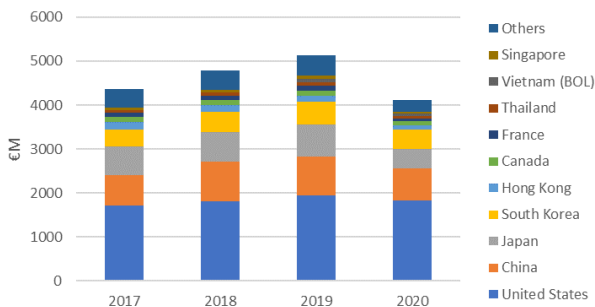
Top 10 Exporters Crab Value



Top 10 Importers Crab Volume



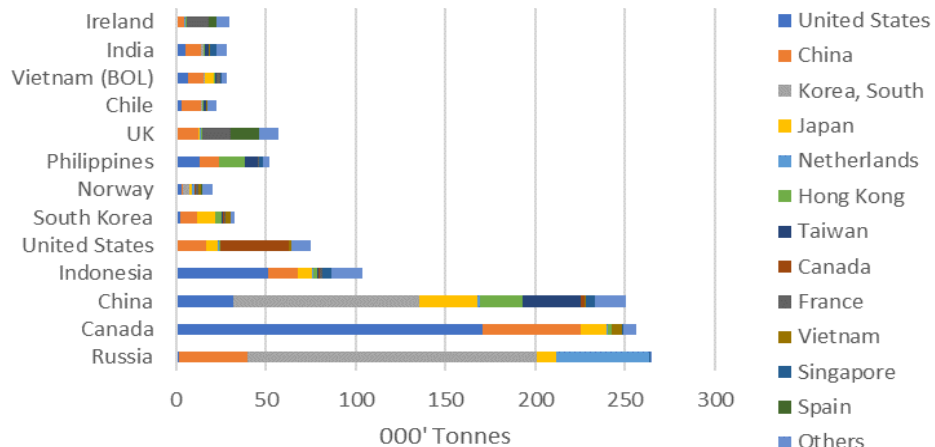
Top 10 Importers Crab Value



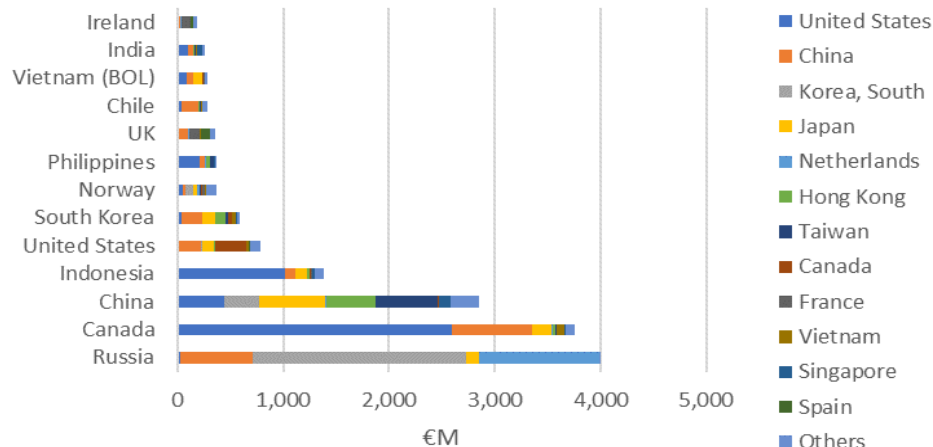
Global Crab Trade

Total Trade Jan 2017- Oct 2020

Main Exporters by Partner - Volume

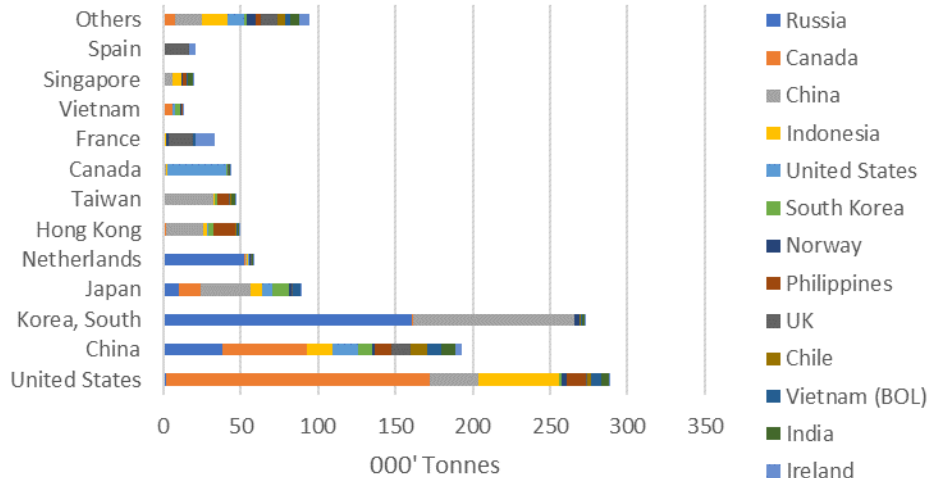


Main Exporters by Partner - Value

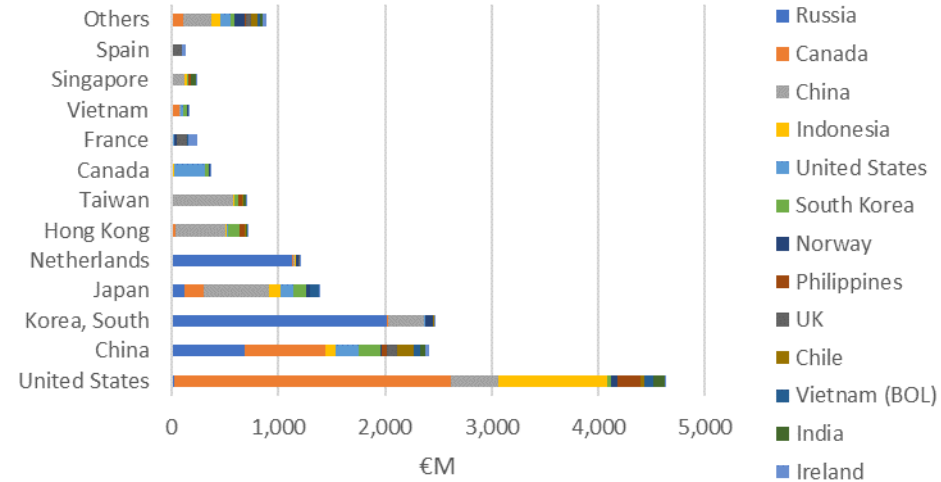


Global Crab Trade

Main Importers by Supplier - Volume

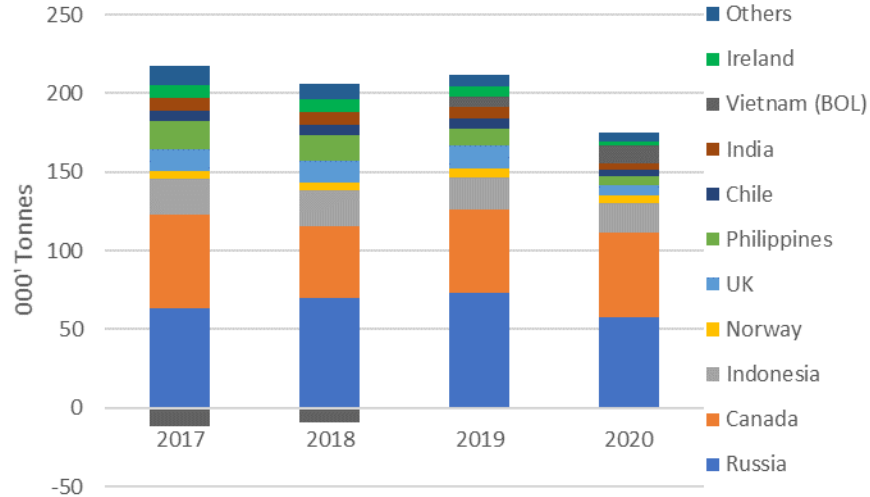


Main Importers by Supplier - Value

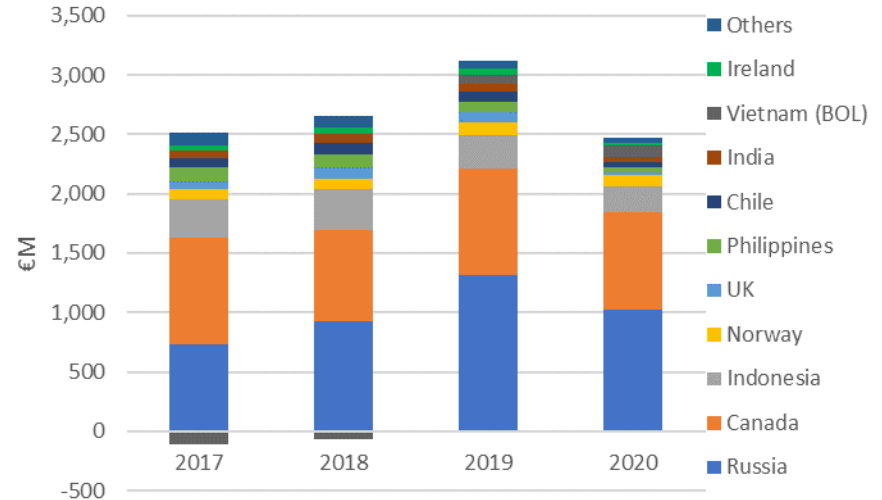


Global Crab Trade

Net Export Volumes Crab

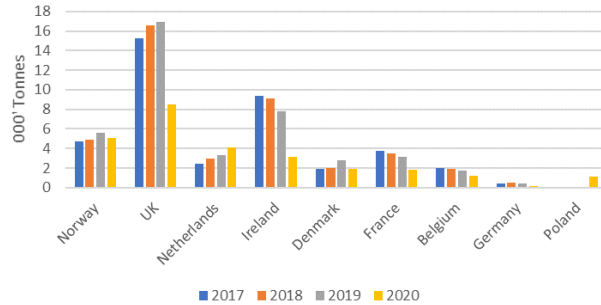


Net Export Values Crab

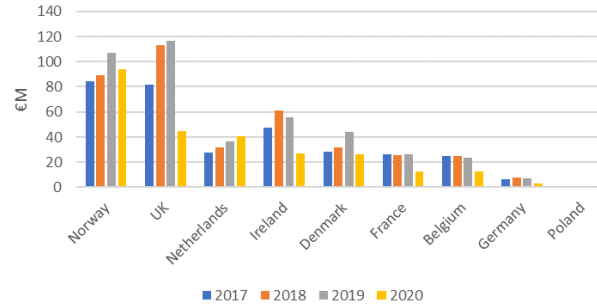


'Atlantic' Crab Trade

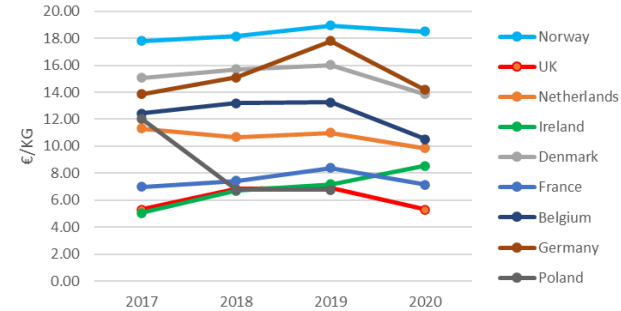
Total Export Volumes 'Atlantic' Crab



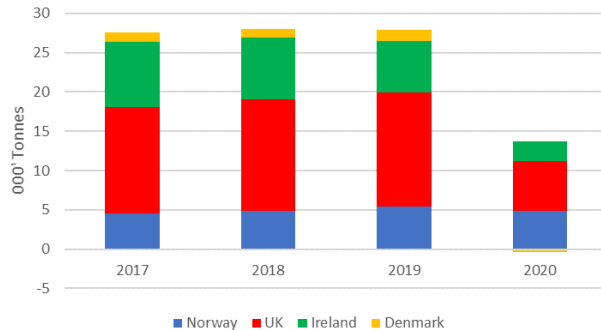
Total Export Values 'Atlantic' Crab



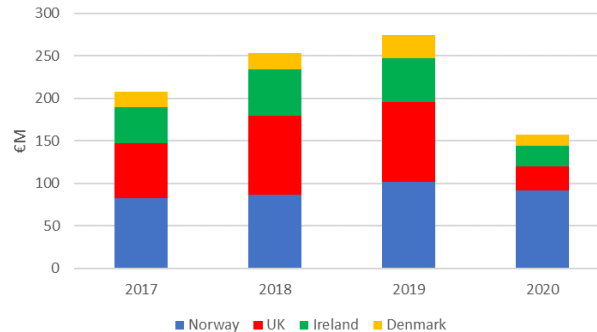
Average Prices Crab Exports



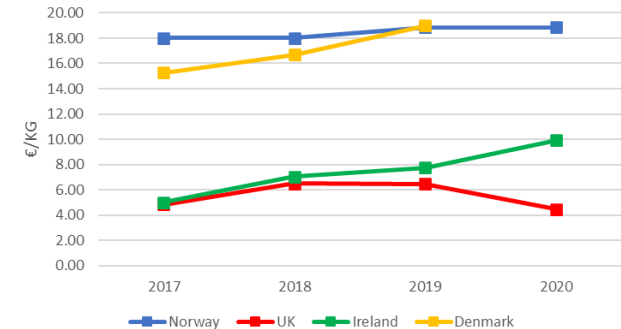
Net Export Volumes Crab



Net Export Values Crab

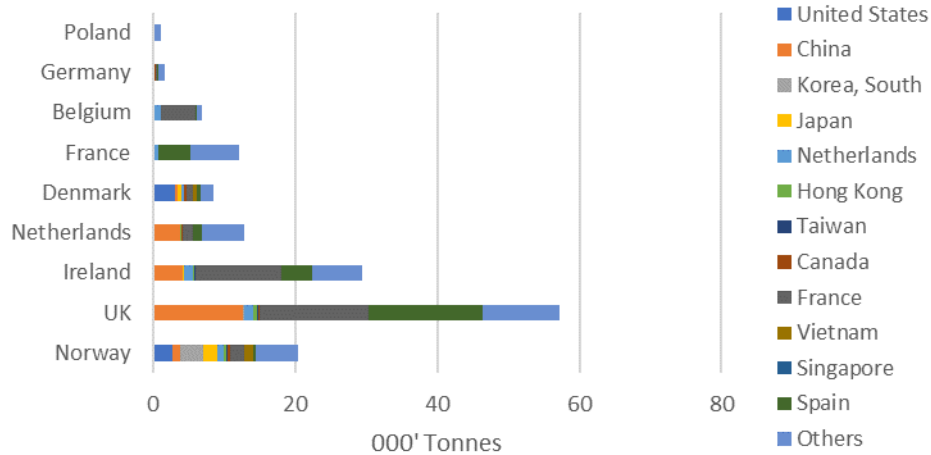


Average Price Net Exports Crab

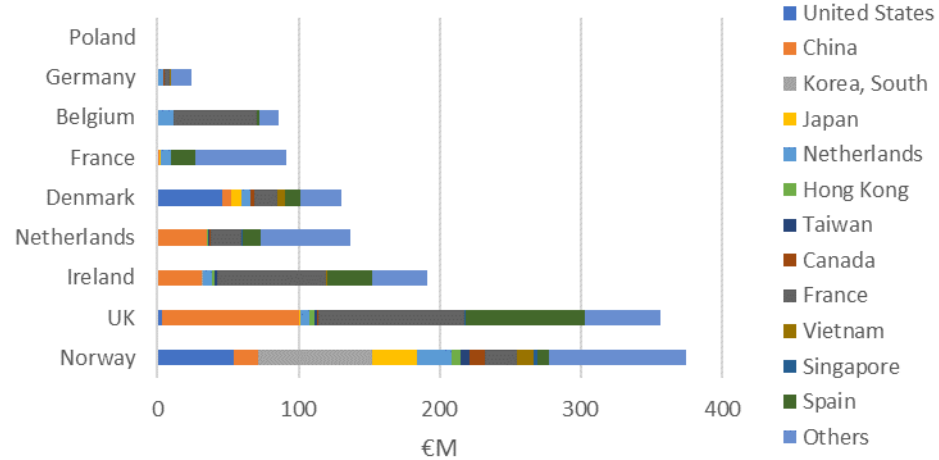


'Atlantic' Crab Trade

Atlantic Exporters Main Partners Vol.

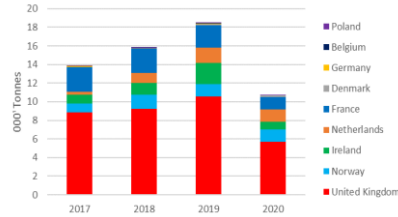


Atlantic Exporters Main Partners Val.

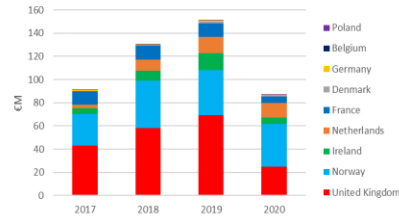


'Atlantic' Crab Trade

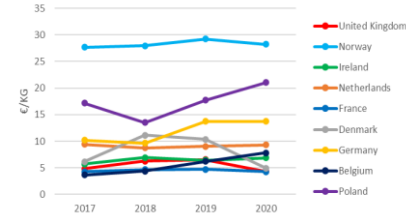
Volume Fresh Crab Exports



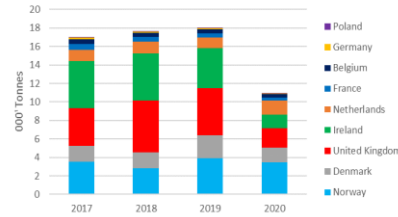
Value Fresh Crab Exports



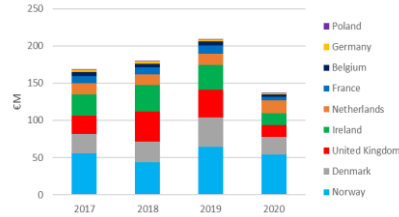
Average Price Fresh Crab Exports



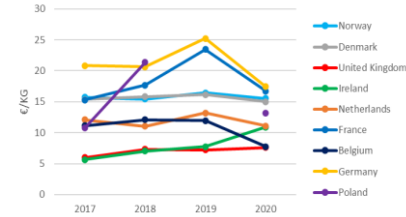
Volume Frozen Crab Exports



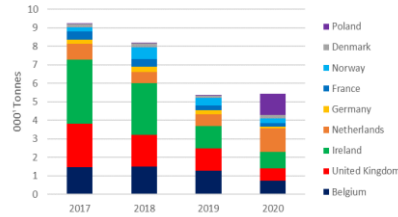
Value Frozen Crab Exports



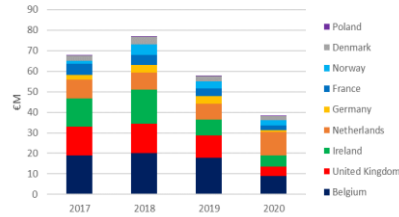
Average Price Frozen Crab Exports



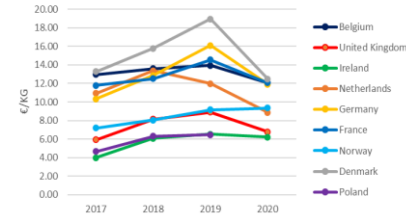
Volume Prepared Crab Exports



Value Prepared Crab Exports

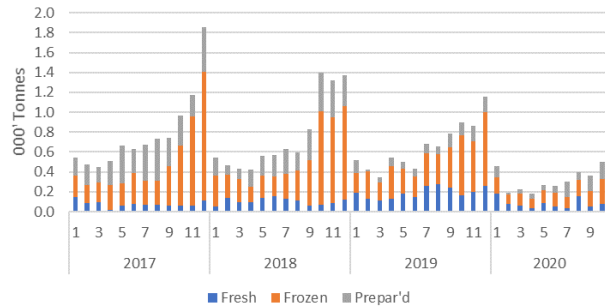


Average Price Prepared Crab Exports

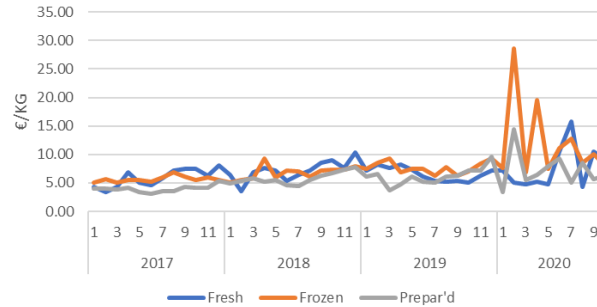


Brown Crab Trade

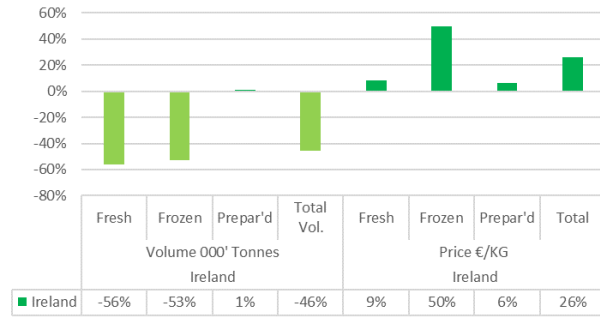
Irish Monthly Exports Brown Crab



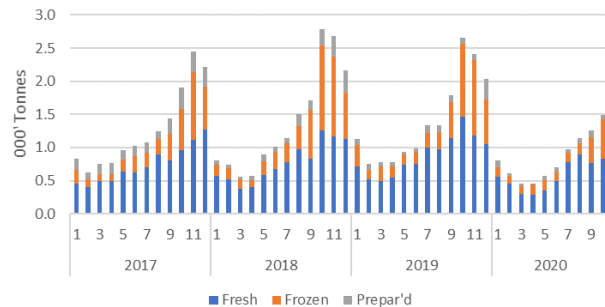
Price Monthly Irish Exports



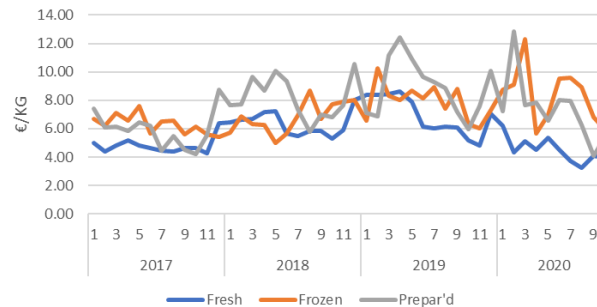
Impact Irish Exports Crab 2020-2019



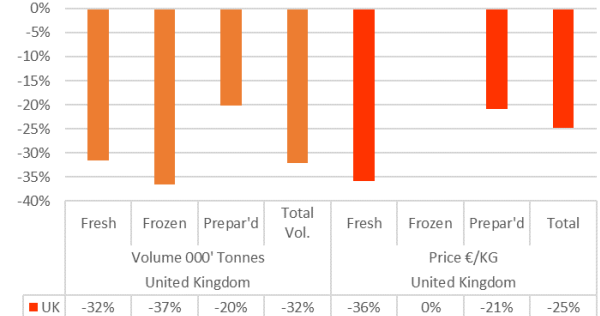
UK Monthly Exports Brown Crab



Price Monthly UK Exports

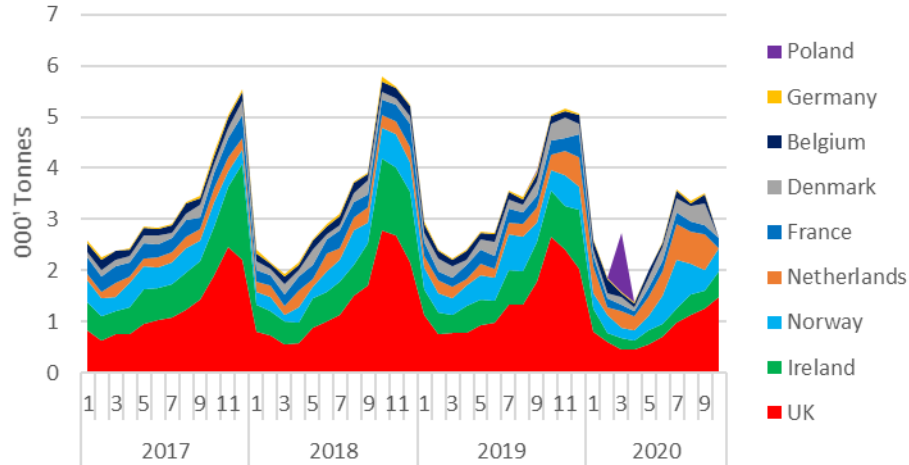


Impact UK Exports Crab 2020-2019

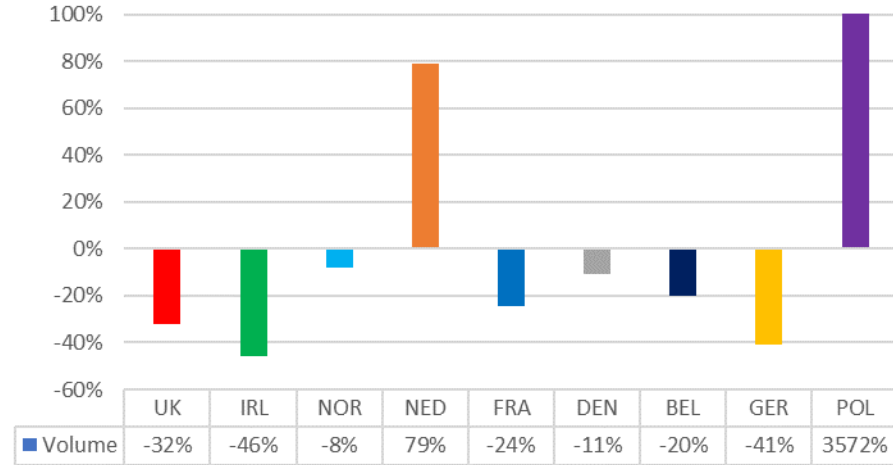


Brown Crab Trade

Monthly Export Volumes Crab



Volume Impact Crab Exports 2020



Conclusion

- Global exports ~ 350KT p.a. + €4bn
 - Frozen and fresh forms increasing, prepared decreasing (volume, value & price)
 - Russia, China, U.S. main exporters
 - U.S., China, Japan main importers
 - Russia and Canada main net exporters
 - UK & IRL 5th and 10th net exporters
- COVID impact Jan-Oct 2020 vs Jan-Oct 2019
 - Volume UK -32%; IRL -46%;
 - Value UK -49%; IRL -31%;
 - Price UK -25%; IRL +26%;
- Ireland
 - FRA main driver ↓21% Fresh, ↓47% Frozen, ↑55% Prepared;
 - ESP 2nd driver ↑83% Fresh, ↓72% Frozen, ↓52% Prepared;
- UK
 - FRA main driver ↑27% Fresh, ↓46% Frozen, ↓44% Prepared;
 - CHI 2nd driver ↓91% Fresh, ↑79% Frozen, ↓13% Prepared;
- Netherlands exports up 80% in 2020 YTD

