

Existing EU trade policy instruments and their impacts on the EU market for fish and fishery products

Report



Initial Focus Group on Trade¹

¹ Established under Working Group 2: EU Markets

This report was prepared by the Initial Focus Group of Trade, which was established under the Terms of Reference² adopted by the Working Group 2 (WG2) of the Market Advisory Council (MAC) per decision at its November 2020 meeting to develop a review of available information on existing trade policy instruments and their impacts on the EU market of fisheries and aquaculture products.

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Initial Focus Group on Trade

Brussels, December 2021

² <https://marketac.eu/wp-content/uploads/2021/11/WG2-ToR-FG-on-Trade-20.01.2021.pdf>



Foreword

The EU seafood market is heavily dependent on imported supplies to meet consumer demand³. The MAC has continuously monitored developments on offensive and defensive opportunities in relation to the various ongoing EU negotiations with third countries on possible new (or revised) trade deals⁴. There are also other policy instruments that affect the market, such as the Generalized Scheme of Preferences (Standard GSP), Everything but Arms, GSP+) and the ATQ's regulation.

The Initial Focus Group (FG) decided for a report structure by providing available information on existing trade policy instruments and their impacts on the EU market in 3 parts: First part to describe the EU market for seafood and the food balance⁵ for the overall seafood group and for (at least) 8 species given priority by the FG; second part to group and map all current EU trade instruments affecting import and third part to demonstrate how individual trade instruments are utilized and affects the import of fish and fishery products in total and for the 8 selected individual species (*tuna, salmon, herring, cod, Alaska pollock, shrimp, squid/octopus and mackerel*).

The aim for the FG is at this stage not to make policy advice, however, to provide an informed basis for later work on policy advice. We have, in the conclusions, pointed to limits in the available data and calculations.

³ AIPCE-CEP had calculated a 68,7 pct. EU import dependance in its Finfish Study 2021.

⁴ Latest in the form of advice on EU-Ukraine Free Trade Agreement. Available on the MAC's website: <https://marketac.eu/en/mac-advice-eu-ukraine-fta/>

⁵ The food balance defined as EU domestic supply (fisheries and aquaculture) + import – Export = EU consumption.



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Part 1

1.1 EU seafood balance (input based on AIPCE-CEP Finfish Study 2021)

Demand for seafood in the EU draws on 3 sources: EU fishing, EU aquaculture, and imports from third countries. The EU fishing fleet and the EU aquaculture provides for the EU total domestic supply. The domestic supply cannot fulfill the EU consumer demand and EU industry's need for raw material on its own, either in volume or species diversity. The market is therefore highly dependent on imported products and species.

In 2020 EU (27) domestic supply amounted to 5.3 mill. tons of seafood; 4.2 mill. came from EU catches, whereas aquaculture production reached 1.1 million tons. Part of EU catches are intended for non-food uses (fishmeal, fish oil – 1,250 thousand tons), which make the total EU domestic supply for food uses 4.1 million tons in 2020.

On the other hand, the total third country imports amounted to 8.947 thousand tons in 2020 which is over twice as high as EU domestic supply in 2020. This brings the total seafood supply in EU to 13,019 mill. tons in 2020.

The net result of domestic supply, import and export gives a calculated seafood consumption of total 13,019 million tons in 2020. The rest is used for non-food consumption (1,250 mill. tons) and export (2,517 mill. tons).

The above-mentioned categories can be implemented in the EU food balance sheet that gives more insight into the European seafood supply chain (EU (27)).



Category	EU landings	EU aquaculture	EU imports	Total EU supply	EU exports	Non-food use ⁶	EU consumption
<i>Total</i>	4.204	1.118	8.947	13.019	2.517	1.250	10.502
Tuna	56	-	1.223	1.391	-	0	
Salmon	-	97	1.303	1.587	225	0	
Herring	712	-	303	1015	244	-	
Cod	109	-	674	918	135	0	
Alaska Pollock	-	-	836	837	25	0	
Shrimp	9	-	625	789	-	0	
Mackerel	443	-	176	619	-	0	
Squid/octopus	203	-	266	469	-	0	

Sources: Finfish Study 2021, Eurostat, EU catch report

⁶ Note: Volumes on indicated species are based on quota utilization. There is a lack of information for those species that are not quoted.



1.2 Comparison/difference between EUMOFA and AIPCE-CEP Finfish study

The AIPCE-CEP report (finfish study) is mainly based on statistics from Eurostat 2020 data and refer to the EU (27). Eurostat provides information by fishery product, species and/or category. To ensure consistency and to make a common comparison, all information in the study have been converted to Whole Fish Equivalent (WFE).

Prior to 2009, the study used the official conversion factors of the German government as the basis of these calculations. Using such official data enables consistency but in the AIPCE-CEP opinion was poorly recognizing some increasingly significant differences in regional processing and product formats that in some instances have become key influencers in the EU and indeed global markets.

AIPCE-CEP methodology adopts an own set of conversion factors based on expressed processing yields gleaned from the experience of AIPCE-CEP members. AIPCE-CEP believes this approach more accurately reflects the differences between major processing methodologies now being employed because of both technical innovation as well as regional shifts around the world. This allows us to assess more realistically how much of the global resources are used in the EU market.

The EU Market Observatory (EUMOFA) regularly publishes trade data and has itself established conversion factors for all CN code through its own research. In most cases these are the same or very closely match those used by AIPCE-CEP and are helping to improve the accuracy of official reporting.

There will always be gaps and anomalies in the official statistics when they are first published and there is a long-established process to correcting these retrospectively. Consequently, historical numbers are adjusted in the Finfish study as later versions become available, but these changes are normally minor.

Trade balances, data, and graphics for the 8 selected species are found in annex.



1.3 Live weight conversion rates

The application of correct live weight conversions rates for calculation of trade balances are critical for arriving at exact, right, and comparable figures. Correct and consistent conversion factors are needed to compare EU catching and aquaculture production data with data on external trade. AIPCE-CEP in its Finfish study base its calculations on WFE (whole fish equivalents).

The live weight conversions factor values need to be regularly assessed and re-evaluated to avoid under- or over-estimation of trade and catches and to adjust to new processing techniques. The EU IUU Coalition prepared a factsheet on live weight conversion factors (attached) and point out that there is substantial variability in conversion factors between Member States which, indeed, would make data for trade balances less reliable. The FG consider that the question on live weight conversion rates deserves its own attention and a discussion, however, goes too far for further elaboration in this report. It is proposed as a subject for further work within MAC. Improved transparency and consistency on conversion factors is generally recommended.

1.4 DG Mare, DG Trade and EUMOFA data and reports on trade balances

The Commission services in DG Trade and DG Mare has provided statistics for the 8 selected species on import and export in the 10 years period from 2011-2020, based on volume and value (*annex*). The trade data are based on actual net weight and specified on a CN-8 level for all product variants within the selected 8 species.

This data set does now allow for calculation of trade balances on a WFE-basis: the data set for EU production are based on live weight (in the Electronic Reporting System (ERS)) while the data set for trade (import and export) are based on actual net weight. This does not allow for adding data to establish trade balances for the 8 selected species.

The production data are up to 2019 at EU-28 level. Trade data are up to 2020 at EU-27 level. This means that UK is not among reporting countries but it is considered each year as a country of origin of EU-27 imports (and destination of EU-27 exports). This is the approach adopted by DG MARE for post-Brexit publications. For each CN-8 item belonging to the different species of interest, the volumes and values of exports and imports are attached.



“The EU fish market” 2021 edited by the European Market Observatory for Fisheries and Aquaculture Products (EUMOFA) aims at providing an economic description of the whole European fisheries and aquaculture industry (link beneath). It replies to questions such as what is produced/exported/imported, when and where, what is consumed, by whom and what are the main trends. A comparative analysis allows to assess the performance of fishery and aquaculture products in the EU market compared with other food products. In this report, value, and price variations for periods longer than five years are analyzed by deflating values using the GDP deflator (base=2015); for shorter periods, nominal value and price variations are analyzed.

EUMOFA EU fish market 2021

1.5 Import data limitation

EU trade statistics for import does not allow for discerning aquaculture and wild caught fish and fishery products which is a limitation for many calculations and for comparing trade data with EU production for aquaculture and wild fisheries. It also does not allow for establishing trade balances specifically for aquaculture and wild caught categories respectively.



Part 2

2.1 Trade policy instruments: 5 overall groups

The supply of fish and fishery products from outside the EU to meet consumer demand and businesses need for raw material are mitigated and facilitated by a significant number of EU trade instruments with differing aims and scope and both to facilitate more imports or as defensive instruments. An overview is provided in *Annex*.

EU trade instruments are here listed in five overall groups. The most comprehensive group are ***preferential trade agreements*** providing for mutual access between the EU and a 3rd country or a group of 3rd countries – based on the principle of preferential originating status of the products. The Trade and Cooperation Agreement between the EU and UK of December 24th, 2020 is the latest of this type of agreement. Other such trade instruments open for unilateral, preferential access to the EU market such as the standard GSP, GSP+ and Everything but Arms.

Another group of instruments are administered ***erga omnes*** (=towards all 3rd countries on equal terms) and therefore with no applied criteria of origin. These are multilateral agreements or admissions given by the EU to third countries, also including agreements with individual countries obliging EU to make the same access available to all other 3rd countries to meet the Most Favored Nations principle in the WTO rules.

The Autonomous Tariff Quotas are also based on the *erga omnes* principle and serves to supply the EU processing industry with raw material where supplies from EU aquaculture and fisheries are insufficient to meet the need for input. The aim is also to provide for equal terms with the same processing steps outside the EU. Erga omnes' and preferential trade instrument's main objective is to make access easier to the EU market.

EU also applies instruments based on ***origin derogations***. The EU custom rules apply a general “wholly obtained” criterion for the origin of fish and fishery products relevant for preferential trade instruments. EU has in place instruments based on derogations from this criterion, eventually as a ‘global sourcing’ provision or derogations in the FTA’s product lists conferring preferential origin



status to otherwise non-originating products when these meet certain processing criteria. The pan-Euro-Mediterranean cumulation convention provides for a comprehensive agreement between 23 party countries allowing for bilateral and diagonal cumulation between the parties. The EEA partner countries (Norway, Iceland, EU, Liechtenstein) allows for full cumulation between the parties.

Finally, EU **trade defense instruments** serves to counteract harm to EU business caused by dumping or subsidy practices by 3rd countries or serves as measures against 3rd countries allowing non-sustainable fishing of common stocks or defend against IUU-fishing products entering the EU (See 2.2.).

In annex trade measures for fish and fishery products are listed in the five main groups and within each agreement the individual quotas and products are listed together with the size of the quota and the duty rates.

EU trade instruments are overlapping. A specific product from a specific 3rd country could be imported into the EU sometimes via 2-4 different trade instruments all providing for easier access to the EU. A product, say, frozen herring from Norway could be imported into the EU via 6 different quotas/instruments. This fact makes it difficult to disentangle and quantify the exact significance of each individual trade instrument. 3rd country exporters could often choose between more alternatives for easier access to the EU.

2.2. IUU and IUU-related instruments

The EU IUU regulation provides the EU with an instrument for controlling fish and fishery import into the European Union and applies to products across trade other instruments. Import of wild caught fish and the products thereof are at the EU border subject to control for *illegal, unreported, and unregulated* (IUU) fishing (IUU). Consignments are to be accompanied by a catch certificate in which the competent flag state authority validates the fish and fishery products. EU sanctions against non-complying countries follow a system of “green”, “yellow” and “red” cards. This provides the EU with an *de facto* trade defensive instrument as import from “red” countries are not allowed for entry into the EU (against fish caught by vessels from that country).



EU also dispose of another IUU-related trade defense instrument in the form of a legal base for deciding on measures against import and/or landings from countries allowing non-sustainable fishing. These measures can take the form of quantitative restrictions on importation of fish from stocks of common interest or/and fish of any associated species (Regulation (EU) 1026/2012 of the European Union and of the Council). No such measures currently apply.

2.3 Fishing outside EU waters and Sustainable Fishing Partnership Agreements

EU Sustainable Fishing Partnership Agreements are not considered as trade instruments; however, the FG considers these agreements important to include to provide a complete picture of the sourcing of seafood to the EU market.

EU vessels fishing outside EU waters provides for a significant supply - also to the EU market, however the exact quantities and how it is accounted for within EU trade and landing statistics is difficult if not impossible to disentangle. These supplies would pr. definition have EU-originating status ('wholly obtained'), however we do not know how much supplies local markets outside EU and how much enter the EU market by direct landing or via 3rd countries. More than 20 pct. of Union vessels catches are taken outside Union waters, providing for a significant sourcing. Calculations of the significance of this source (and how it is accounted for in EU statistics) are not carried out by this Focus Group but would provide for a valuable insight and knowledge on the total EU seafood balance. To our knowledge EU Commission do not dispose of ready calculations or statistics in this respect.

Annex part 2 with trade instruments overview, attached



Part 3

3.1. Trade instruments and import of seafood to the EU

The aim of part 3 is to describe the significance of EU trade policy instruments on the import and supply of fish and fishery products to the EU market.

Besides providing information of the trade instruments for the total import of fish and fishery products the FG identified 4 criteria by which to select individual species/products for information on the utilization of trade instruments. The 4 criteria are:

- Quantity of imports
- Quantity of added value
- Conflict with EU production
- Risk of IUU fishing

With these criteria the following list of species were selected by the FG:

- *Tuna*
- *Salmon*
- *Herring*
- *Cod*
- *Alaska pollock*
- *Shrimp*
- *Squid/octopus*
- *Mackerel*



3.2. Utilization of preferential trade instruments (“PURs”)

DG Mare has provided insight via calculations on the group of *preferential* trade instruments (GSP + other preferential trade instruments, see section 2). There is data for total imports via *preferential* instruments and total imports via Most Favored Nation tariffs. When compared to the import which is exclusively eligible for MFN then the Preferential Utilization rate (PUR) is calculated⁷.

The PUR is thus calculated to arrive at a figure for the share of import benefiting from available preferential trade instruments. *The PUR calculations are attached in annex.*

The calculation system of the PUR provides insight into the utilization exclusively for the group of preferential trade instruments. The system has some limits in relation to the aim of this part. Most importantly, the trade in preferential tariff rate quotas (TRQ’s) is considered as eligible even if the quota is exhausted, quota sizes being not considered in the equation. To take one example: In the case of CN 0302 14 00 (fresh, whole salmon) all imports are considered eligible for preferential access to the EU even though only a small fraction is covered by TRQ’s. For individual tariff lines and products this can become very significant while such discrepancies are usually acceptable at aggregated level.

Also, for the purpose of this section we would have needed inclusion in the calculation of *non-preferential market access* to the EU (*erga omnes*) as these trade instruments plays an important role for import of fish and fishery products (see section 2 on *erga omnes* trade instruments). It is not quite clear as to how imports based on *erga omnes* instruments eventually are included in the calculation models.

The goal of this part 3 is to show how imports of the 8 selected species – and the aggregated group of all fish and fishery products (Chapter 3, heading 1604 + 1605) - are facilitated by ALL trade

⁷ The “PUR” is calculated as the ratio between 1 and 2:

1. The preferential imports (Usage GSP + Usage Other prefs)
= Total imports – Usage MFN (i.e. MFN tariff applied)

2. The imports eligible for preferences (Eligible All prefs)
= Total imports – Eligible MFN only (i.e. products MFN0 + products not covered by the pref. agreements)



instruments. What is the utilization of all listed trade instruments (part 2) for import of, say, herring? How much are imported via which trade instruments and how much are imported outside any instrument to 'normal' tariff rates (*MFN-based*).

A complete picture needs to take account of all kinds of trade instruments and would also need to take account of TRQ's setting limits for preferential access to the EU. This would need further work and calculations and would need data bases for import where individual import transactions are registered by exact applied trade instruments.

For individual species and products defined by HS codes all trade instruments are listed for these in the TARIC database⁸. Another comprehensive instrument for consulting for available trade instruments (and procedures and rules of origin etc.) for individual products are the access2markets database.

Access2Markets Welcome home page (europa.eu)

3.3. Implementation of EU trade agreements

The latest DG Trade yearly report on *implementation and enforcement of EU trade agreements* has been published October 27th, 2021. This report provides for valuable insight in the overall significance of EU trade instruments for export and import with relatively high focus on exports (market access to third countries). This report provides for information across all sectors. The report provides no specific analysis of trade in fish and fisheries products.

Implementation and enforcement of EU trade agreements

Available information for this part 3 has not allowed for illustrating the exact significance of individual EU trade policy instruments on the import and supply of fish and fishery products to the EU market. We are thus not able to answer questions such as "which trade instruments are used when importing mackerel products to the EU? More detailed calculations would be needed to provide for answers.

⁸ TARIC Consultation (europa.eu)



Conclusions

Within this report the FG has collected information and described existing trade instruments and their significance for the EU seafood market. We also have found limits in the information, data and the statistical sources:

- *The official EU trade statistics do not readily allow for establishing trade balances for the EU seafood market because it would need to be based on conversion rates and whole fish equivalents (WFE) also for import categories,*
- *There are more problems with conversions rates. They should be transparent and consistent between member countries and between import data and EU production,*
- *EU trade data do not allow for differentiation between aquaculture and wild caught categories,*
- *The sourcing of seafood from EU vessels fishing activity within Sustainable Fishing Partnership Agreements to the EU market are not to be found in any data source,*
- *There are limits to demonstrating the exact significance of individual trade instruments on the import and supply of specific products,*
- *The DG Trade yearly report on implementation and enforcement of EU trade agreements does not provide for specific analysis of fish and fisheries products.*



Annex 1. Trade balances, data and graphics for 8 selected species

Cod

Cod

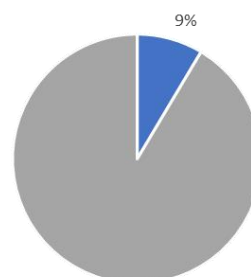
EU-supply

2020
918k tonnes (WFE)

Of which imported:

- **dried/salted:**
268k tonnes (WFE)
- **Fillet, frozen:**
209k tonnes (WFE)
- **Whole, frozen:**
197k tonnes (WFE)

Self-sufficiency



Country of origin

840k tonnes (WFE)

	Norway	34%
	Iceland	24%
	Russia	17%



Source: Eurostat/Comext; EU Catch Report; FEAP
Edited by AIPCE-CEP 2021

Europe is the largest single market for all species of cod. Around 70% of the total cod volume is consumed on this continent.

The total EU cod supply in 2020 was 918 million tonnes. Most of the caught Atlantic cod comes from the Barents Sea. Quotas in the Barents Sea increased in 2020 (+2% to 738,000 tonnes) and 2021 (+20% to 885,600 tonnes), which is important for the future EU cod supply.

The mid-Atlantic region around Iceland is another important source for Atlantic cod. This area shows an increasing quota for 2020 (to 270,411 tonnes) but a decreasing quota in 2021 (to 254,273 tonnes) due a shortfall of cod. The total share of Icelandic cod was 24% in 2020. It is expected that the share



of Icelandic cod will decrease in 2021. 9% of the Atlantic cod supply came from EU fisheries, 79 thousand tonnes in 2020.

Pacific cod are mainly caught by USA/Canada, Russia, Japan and Korea. Pacific cod supply is expected to decline in 2021, where the most of this decline is accounted for by reduced US and Canadian landings.

The most important import countries for cod in 2020 were Norway (34%), Iceland (24%) and Russia (17%). Where the biggest share of cod from Norway consists of salted/dried cod, Icelandic Cod are exported as fresh and frozen fillets/blocks mainly and Russian cod as frozen headed and gutted.

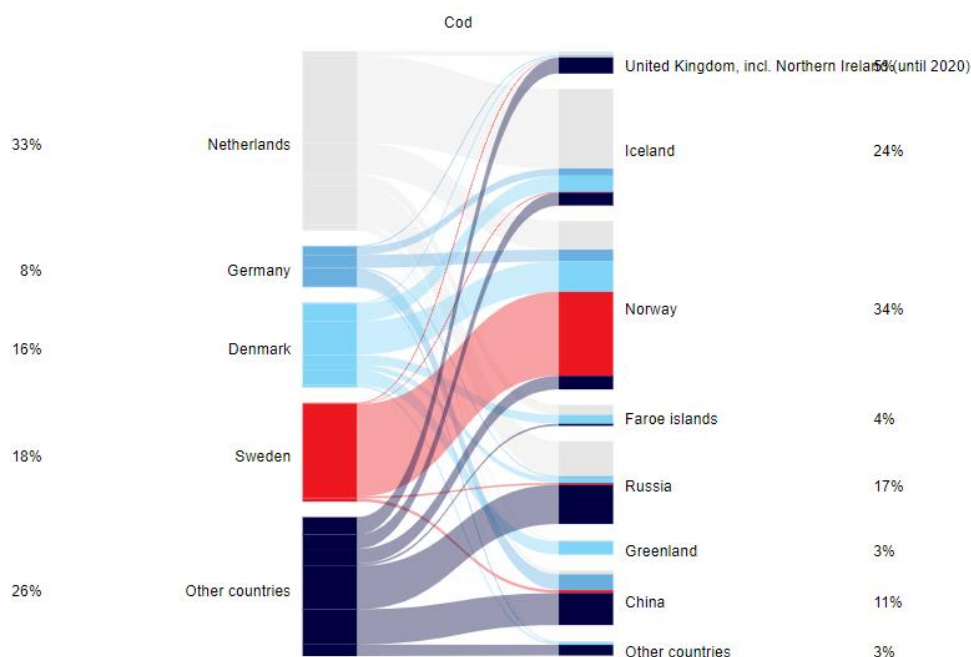


Figure 5.2.1: EU-27 importers (left) and countries of origin outside the EU-27 (right) for cod. Source: Eurostat, edited by WUR/AIPCE-CEP.

Cod enters the EU mainly via the border control posts of Netherlands, Denmark and Sweden. Most of the cod imports in 2020 consisted of dried/salted cod (32%), frozen fillets (25%) and frozen whole cod (23%). Cod is re-exported within the EU - either or not processed - to especially France, Portugal and Spain.



Around 135 thousand tonnes of cod were exported to third countries in 2020. A significant amount of frozen whole cod (headed and gutted) was re-exported from especially the harbour of Rotterdam to China. The disrupting logistics and shipping to China due to corona have a negative impact on whole cod re-export via the EU in 2021. Other important third countries the EU exports cod to are the UK, Brazil, and Norway.

Industry benefits from two significant Autonomous Tariff Quota (ATQ) allowances in cod. These ATQs are the basis for raw materials in the EU fish processing industry. H&G cod (09.2759) has a limit of 110,000 tonnes and cod fillets (09.2776) have a 50,000 tonnes duty free import allowance in 2020. Another ATQ for cod is salted cod for processing (09.2765) with a 2,000 tonnes duty free import allowance in 2020. All quotas are there to stimulate growth, employment and investment in EU fish processing industry.

Alaska Pollock

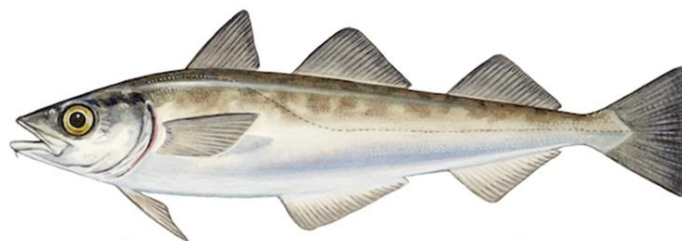
Alaska Pollock

EU-supply

2020
837k tonnes (WFE)

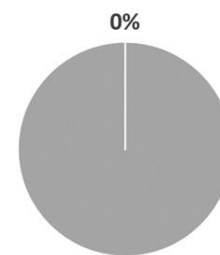
Of which imported:

- **Fillet, frozen:**
781k tonnes (WFE)
- **Meat, frozen:**
53k tonnes (WFE)
- **Whole, frozen:**
2k tonnes (WFE)



Source: Eurostat/Comext; EU Catch Report; FEAP
Edited by AIPCE-CEP 2021

Self-sufficiency



Country of origin

837k tonnes (WFE)

	USA	44%
	China	37%
	Russia	19%



The total supply of Alaska Pollock is expected to increase slightly to 3.6 million tonnes in 2021. All of this growth will be accounted for by the Russian Federation.

The EU is fully depending on third country imports of Alaska Pollock, self-sufficiency is 0%. The total supply – and thereby third country imports – accounted to 837 thousand tonnes in 2020.

The EU represents a significant and key market for both USA and Russian Alaska pollock. The most important countries for Alaska pollock in 2020 were USA (44%), China (37%) and Russia (19%).

Russian Federation pollock producers increased their focus on EU. Especially MSC certified Alaska pollock finds its way to the EU.

The industry benefits from a significant Autonomous Tariff Quota (ATQ) allowance in Alaska pollock (09.2777), which is the largest single ATQ assignment. The total ATQ quantity is 340,000 tonnes and was 64% used at the end of October 2021 (93% utilization in 2020).

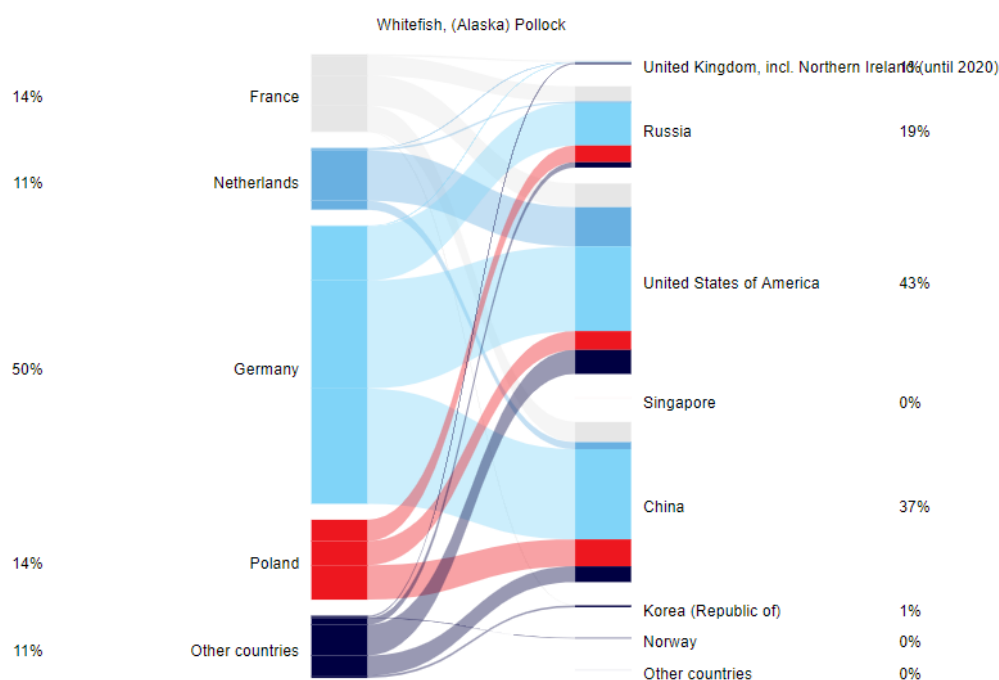


Figure 5.2.4: EU-27 importers (left) and countries of origin outside the EU-27 (right) for Alaska Pollock. Source: Eurostat, edited by WUR/AIPCE-CEP.



93% of the Alaska pollock imports in 2020 consisted of frozen fillets, followed by frozen Alaska pollock meat (6%).

Germany is the main importer of Alaska Pollock, followed by Poland, France and the Netherlands. Alaska pollock is an important source for surimi. Import volumes for surimi are not mentioned in this chapter.

Only a small amount of Alaska Pollock is exported outside the EU, around 25 thousand tonnes in 2020. Importing third countries are especially the surrounding European countries like Switzerland, UK and Norway.

36% of the haddock imports in 2020 consisted of frozen fillets and 36% of frozen whole haddock.

Most of the haddock is imported via a border control post of the Netherlands, Denmark, Sweden or Poland.

Around 42 thousand tonnes of haddock were (re-)exported outside the EU to mainly the UK (62%) and in lesser amount China (36%) in 2020. This corresponds to 41% of total haddock supply in the EU.

There is a modest ATQ for haddock available for EU industry. An ATQ of 3,500 tonnes of H&G haddock (09.2824) was available for a 0% import duty allowance. In 2021 (until the end of October) 43% of this quatum was utilised (93% utilisation in 2020). It is questionable if the amount of 3,500 tonnes is high enough for covering the industry demand when growth is factored in.



Salmon

Salmon (all species)

EU-supply

2020
1, 578k tonnes (WFE)

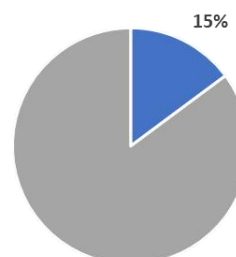
Of which imported:

- **Whole, fresh:**
988k tonnes (WFE)
- **Fillet, frozen:**
187k tonnes (WFE)
- **Fillet, fresh:**
128k tonnes (WFE)



Source: Eurostat/Comext; EU Catch Report; FEAP
Edited by AIPCE-CEP 2021

Self-sufficiency



Country of origin

1,374k tonnes (WFE)

	Norway	78%
	UK	7%
	China	5%

Salmon is the most consumed seafood specie in the EU. From all salmon species, Atlantic salmon is the most important one. The total EU salmon supply keeps increasing and reached 1,587 thousand tonnes in 2020. From this supply 85% percent comes from outside the EU-27.

Fresh whole salmon is responsible for 72% of the total salmon imports, followed by frozen salmon fillets (14%) and fresh salmon fillets (9%).

An increasing number of salmon is imported as raw material for processing in the EU-27. Most of the raw materials come from EFTA regions, like Norway, Iceland and Faroe Islands. Especially imports from Norway are of high importance, accounting for 78% of total salmon supply in 2020 (and 90% of the total whole fresh salmon supply in 2020). Norwegian salmon creates more jobs in the EU than it does in Norway. The import of 1,071 tonnes of Norwegian salmon to the EU-27 is good for then thousands of direct jobs for the EU seafood processing industry.



Salmon from Norway enters the EU-27 especially by road via border control posts of Sweden, Denmark and Poland, where the fish are processed and/or further distributed throughout the EU-27. Processing in the EU-27 is an interesting option for Norway, where labor in the EU is much lower, the import of unprocessed products will cost less import duty compared to processed products, and whole skin on salmon retains its quality better than processed products. Traditional EU wild caught processing plants are forced to diversify their processing assortment to stay solvent due to shortage of EU production. Salmon has become an essential processing species for these plants in especially Poland, Netherlands, Belgium, Denmark and France. Filleting and cold/warm smoking are the most important processing steps.

UK became an important new third country in 2020 where salmon products were imported from into the EU-27. Materials are mainly originated from Scotland mariculture of Atlantic salmon. 66% of the total imports of 97 thousand tonnes consisted of whole, fresh salmon.

COVID-19 didn't affect the consumption of salmon that much because salmon has the benefits of being part of a stable well established retail assortment. Consumers were still able to buy salmon during lockdown and prepare it at home.

For 2021 it is expected that the import of salmon from the US will be significantly lower than the years before. At the end of 2020 an implementing regulation on compensatory measures in the Boeing/Airbus dispute entered into force where frozen whole salmon, fileted salmon and smoked salmon originated from the US received an additional duty of 25%. Additional duties ended in July 2021.



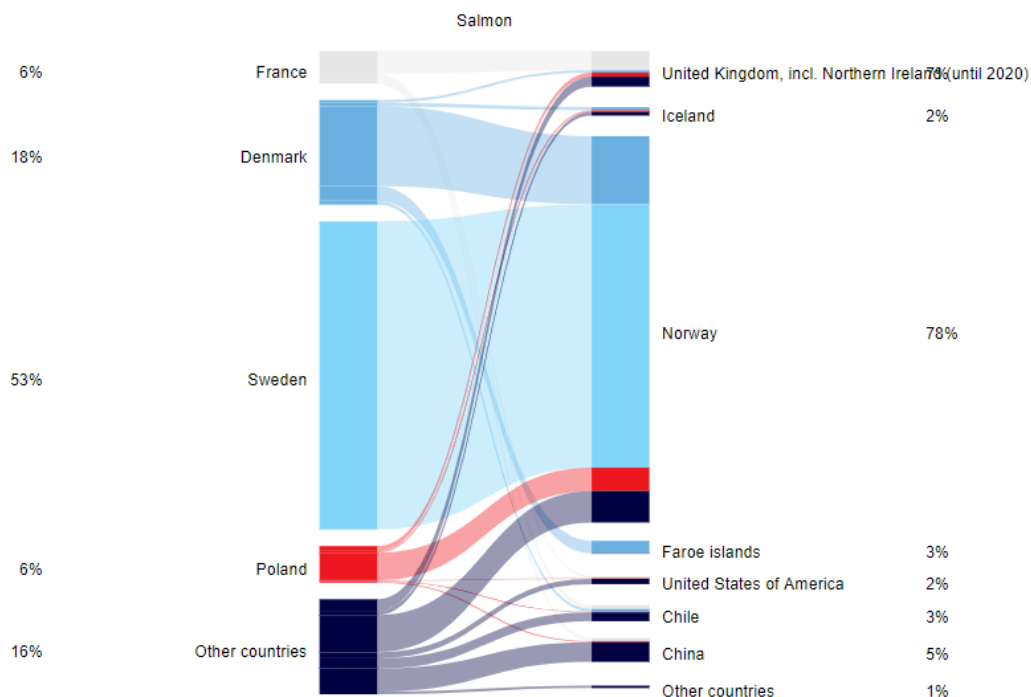


Figure 5.3.1: EU-27 importers (left) and countries of origin outside the EU-27 (right) for salmon.

Source: Eurostat, edited by WUR/AIPCE-CEP.

There is an ATQ allowance available for frozen wild caught pacific salmon H&G, and fillets (Council Regulation (EU) 2020/1706). The total quota volume is 10.000 tonnes. However, utilization was low in 2020, around 24%.

Around 225 thousand tonnes of available (processed) salmon products in the EU-27 were exported to third countries. UK (39%), USA (25%) and Switzerland (7%) were the most important importers.



Shrimp

Shrimps

EU-supply

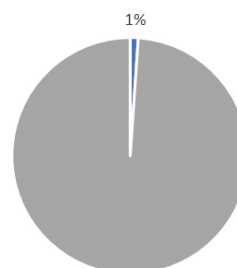
2020
789k tonnes (WFE)

Of which imported:

- **Frozen (*Panaeus*) shrimp:**
318k tonnes (WFE)
- **prepared, preserved:**
234k tonnes (WFE)
- **Frozen (*Pandalidae*) shrimp:**
73k tonnes (WFE)



Self-sufficiency



Country of origin

780k tonnes (WFE)

	Ecuador 19%
	Greenland 15%
	Vietnam 12%

Source: Eurostat/Comext; EU Catch Report; FEAP
Edited by AIPCE-CEP 2021

The total shrimp supply accounted to 789 thousand tonnes in 2020. From this supply, 780 thousand tonnes of shrimp were imported from third countries and 9 thousand tonnes came from quoted shrimp fisheries in the EU. This shows that the EU is heavily depending on imports for shrimp.

Most of the shrimp were imported from Ecuador (19%; Pacific white shrimp), Greenland (15%; Borealis shrimp), Vietnam (12%; Pacific white shrimp & black tiger shrimp), Argentina (10%; Argentine red shrimp) and India (8%; Pacific white shrimp & black tiger shrimp).

Most of the shrimp producing third countries that export to the EU do have a GSP or a free trade agreement (Ecuador, Vietnam and Canada) in force where shrimp are imported under reduced or zero import tariffs.



For cold water shrimp there are three ATQs available for the key *pandalus* species of *borealis*, *montagui* and *jordani* in 2019 (09.2794, 09.2798, 09.2800). Total allowance decreased to 8,5 thousand tonnes due to the introduction of CETA.

Warm water prawns have a separate ATQ (09.2802). In recent years quota was 30 thousand tonnes, that was used up in the first half of the years. For 2019 40 thousand tonnes was agreed and since 2021 there is a quota allowance of 48,000 tonnes. At the end of October 75% of the quota was utilised.

Frozen *Penaeus* shrimp was responsible for 41% of total import in 2021, followed by prepared and preserved (cooked) shrimp (30%).

Shrimp products from India and Vietnam are exported into both Southern and Northern Europe as both prepared as whole products. Shrimp from Ecuador are imported into especially the South of Europe as whole raw and unpeeled.

Argentine red shrimp are imported mainly by Spain and Italy for the Southern European market.

Borealis shrimp from Greenland and Canada are mainly imported via Denmark and (re-)exported into the rest of the EU.



Tuna

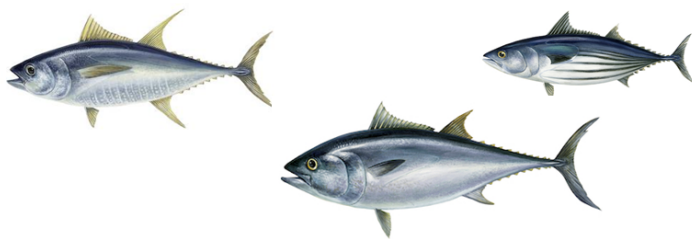
Tuna

EU-supply

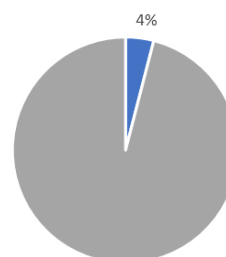
2020
1,391k tonnes (WFE)

Of which imported:

- **Prepared tuna:**
554k tonnes (WFE)
- **Frozen tuna loins:**
450k tonnes (WFE)
- **Whole frozen tuna:**
219k tonnes (WFE)






Self-sufficiency



Country of origin

1,335k tonnes (WFE)

	Ecuador	22%
	China	10%
	Philippines	8%

Source: Eurostat/Comext; EU Catch Report; FEAP
Edited by AIPCE-CEP 2021

Tuna is one of the top 3 species consumed in the EU. Skipjack tuna and yellowfin tuna are the most important tuna species in terms of volume. Other important species are bigeye tuna, albacore tuna and bluefin tuna.

Total supply of tuna products from third countries accounted to 1,391 thousand tonnes in 2020. From this total EU fisheries landed in total 56 thousand tonnes of tuna in 2020, which realizes a self-sufficiency of 4%.

Most important country for tuna in 2020 was Ecuador (22%), followed by China (10%) and Philippines (8%). Ecuadorian tuna benefit from a free trade agreement between EU and Ecuador.

However, the supply of large pelagics such as tuna are governed by complex relationships between the EU and the locale of catch. EU flagged vessels operating under licence in many distant water



fisheries which in itself provides substantial employment and fishing activity for EU vessels and processors.

With an average annual production of more than 370,000 tonnes, the EU canned tuna industry supplies only 46% of the EU market, with Spain, Italy, Portugal and France as main producers. It provides 20,140 direct jobs in the EU and 60,660 indirect jobs in the supporting sectors. This industry is located in areas highly dependent on fisheries and fish processing. As the recently EUMOFA report exposed, tuna loins have allowed the canning industry to maintain its competitiveness and its activity in the EU, which otherwise would have faced difficulties competing with factories located near the fishing areas. So, it avoided the risk of a delocalization of production facilities outside EU.

There is a modest ATQ (09.2790) of 35 thousand tonnes for tuna loins for further processing that is exhausted very quickly – within days of opening – but in total represents only a small fraction of the total trade.

Most tuna is imported in a prepared format (cans), 42% in 2020. Tuna loins (for canning) represent 34% of total import.



Mackerel

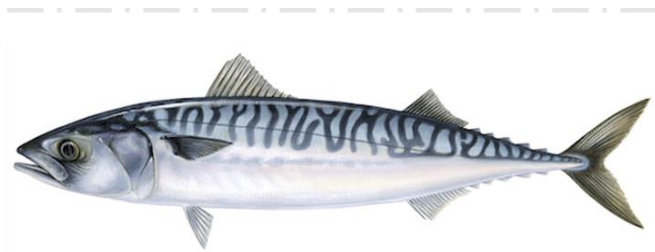
Mackerel

EU-supply

2020
619k tonnes (WFE)

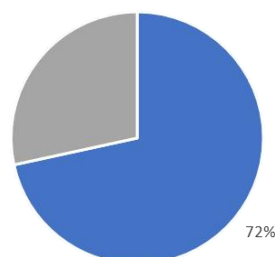
Of which imported:

- **Whole frozen:**
119k tonnes (WFE)
- **Frozen fillets:**
29k tonnes (WFE)
- **Whole fresh:**
13k tonnes (WFE)



Source: Eurostat/Comext; EU Catch Report; FEAP
Edited by AIPCE-CEP 2021

Self-sufficiency



Country of origin

176k tonnes (WFE)

	UK	29%
	Norway	21%
	Iceland	19%

Mackerel is one of the most important small pelagic commercial species in the world. The global annual catches of mackerel have totalled around one million tonnes in recent years, with the main catching nations being the EU, UK, the Faroe Islands, Greenland, Iceland, Norway and Russia.

Small pelagics such as mackerel are important species in the EU fishery complex and comprise the largest proportion of the tonnages taken in EU waters under quota species. The EU supplied in total 443 thousand tonnes of Mackerel in 2020.

With a percentage of 72% self-sufficiency in the EU is high. The 176 thousand tonnes of mackerel that is imported into the EU comes from especially UK (29%; 51 thousand tonnes in 2020), Norway (21%; 36 thousand tonnes in 2020) and Iceland (19%; 34 thousand tonnes in 2020).

Mackerel from the Northeast Atlantic Fisheries is of high importance for the EU seafood market. In 2019 there was a lack of agreement between coastal states about the fishing rights for 2020 showing



the complexity of a multi-national management of fish stocks. This meant that the mackerel stock in this area was being fished at levels beyond the scientific advice and couldn't be sold under the MSC label at this moment.

Early 2021, Norway and Faroe Islands unilaterally increased their share in mackerel fisheries, which led to new disagreements about fishing rights.

At the end of 2021 a delegation of the EU, Faroe Islands, Greenland, Iceland, Norway, Russian Federation and UK reached an agreement on the management measures for mackerel for 2022. The TAC (794,920 tonnes) has been set according to the scientific advice from ICES. It is important to reach an agreement regarding quota allocation to prevent having disruptive consequences that will affect the rest of the supply chain.

EU TAC in 2020 was 447 thousand tonnes and almost fully used in that year. The total TAC for the Northeast Atlantic mackerel in 2020 reached 1,090 thousand tonnes. For 2021 it is expected that this mackerel TAC will be higher (1,199 thousand tonnes), keeping in mind that the quota is not internationally agreed.

Almost all the supplying countries for mackerel are all in the EFTA region. However, there is an ATQ of 5 thousand tonnes (under 5% import tariff) available for chub mackerel (whole, fillets and flaps).

Frozen mackerel whole accounts for 68% of the mackerel imports, followed by frozen mackerel fillets (17%).

188 thousand tonnes of mackerel were exported outside the EU27. Especially as whole frozen or prepared and preserved. Nigeria (19%), Egypt (15%) and UK (13%) were most important third countries the EU27 exported to.



Herring

Herring

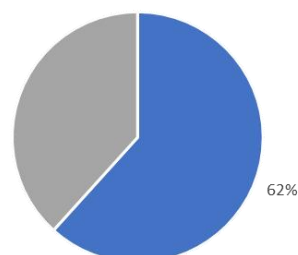
EU-supply

2020
1,015k tonnes (WFE)

Of which imported:

- **Herring flaps, frozen:**
120k tonnes (WFE)
- **Frozen fillets:**
118k tonnes (WFE)
- **Herring preparations:**
65k tonnes (WFE)

Self-sufficiency



Source: Eurostat/Comext; EU Catch Report; FEAP
Edited by AIPCE-CEP 2021

Country of origin

389k tonnes (WFE)

	Norway	76%
	UK	9%
	Iceland	7%

Small pelagics such as herring are important species in the EU fishery complex and comprise the largest proportion of the tonnages taken in EU waters under quota species. The total herring EU supply reached 1,015 thousand tonnes in 2020.

With a TAC of 657 thousand tonnes in 2020 herring is the largest individual species tonnage caught under EU management and in its waters. The EU self-sufficiency for herring is high with a percentage of 62% in 2020.

At the end of 2021 a delegation of the EU, Faroe Islands, Greenland, Iceland, Norway, Russian Federation and UK reached an agreement on the management measures for Atlanto-Scandian herring in the Northeast Atlantic for 2022. The TAC (598,588 tonnes) has been set according to the scientific advice from ICES.



There are several ATQs available for herring. A quota of 10 thousand tonnes is available for herrings, of a weight exceeding 100 g per piece or flaps of a weight exceeding 80 g per piece, excluding livers and roes, for processing. Another ATQ of 5 thousand tonnes (under 10% import tariff) is available for herrings, spiced and/or vinegar-cured, in brine, preserved in barrels of at least 70 kg net drained weight, for processing.

In order to remedy the consequences of the withdrawal of the UK from the EU as regards the loss of preferential status of the British overseas countries and territories and to remedy the consequences of the expiry of the additional protocols with Norway and Iceland, a new ATQ regulation entered into force and applied from 1 January 2021. In these amending ATQs a quota of 22.5 thousand tonnes of herrings, spiced and/or vinegar-cured, in brine, for processing was added. Other herring quota added were frozen herring for processing (15 thousand tonnes) and fillets (25 thousand tonnes) or flaps (12.5 thousand tonnes) of herring.

Frozen herring flaps were responsible for 31% of the herring imports in 2020, followed by frozen fillets (30%). Norway is the most import third country for herring imports (76%: 295 thousand tonnes in 2020), followed by UK (9%; 35 thousand tonnes) and Iceland (7%; 29 thousand tonnes).

244 thousand tonnes of herring were exported to third countries in 2020 containing especially whole frozen herring. The most important exporting third countries are Nigeria (32%), Egypt (22%) and Ukraine (17%).



Cephalopods

Cephalopods

EU-supply

2020
469k tonnes (WFE)

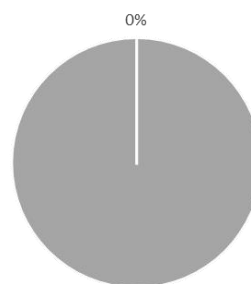
Of which imported:

- **Frozen Loligo:**
145k tonnes (WFE)
- **Frozen octopus:**
85k tonnes (WFE)
- **Frozen sepiola:**
36k tonnes (WFE)



Source: Eurostat/Comext; EU Catch Report; FEAP
Edited by AIPCE-CEP 2021

Self-sufficiency



Country of origin

469k tonnes (WFE)

	Morocco	20%
	Peru	18%
	India	13%

The main products that fall under cephalopods are squid, cuttlefish, and octopus. The total cephalopods EU supply in 2020 was 469 thousand tonnes. Important cephalopod species are loligo squid and common octopus. The most important countries for cephalopods in 2018 were Morocco (20%), Peru (18%) and India (13%).

Frozen Loligo squid was responsible for 34% of total import in 2020 (162 thousand tonnes), followed by frozen octopus (18%). Most of the cephalopods are consumed in the Southern European countries. These countries are familiar with cephalopods.

Cephalopods caught in the EU do not fall under a quota system (and thereby not included in the info-graphic above). However, there is a significant fishery on cephalopods (squid, cuttlefish and octopus), catching around 200 thousand tonnes of cephalopods yearly.

Main exporting countries for cephalopods are USA, Morocco, Switzerland, and UK.



Source: AIPCE-CEP, Brussels, November 2021.

Turenhout, M.N.J., Keller M., Schimke A., Rilatt S., Melgaard Jensen P., Short M., Sipic K., 2021. Finfish Study 2021. AIPCE-CEP report, Brussels

The full report is publicly available via the AIPCE-CEP website:

<https://www.aipce-cep.org/aipce-cep/white-fin-fish-study/>



Annex 2. Overview of trade instruments

Preferential Agreements

EU has concluded a series of free trade agreements ('preferential agreements') with 3rd countries implying reduced or zero duty (reciprocally). Other arrangements provide for unilateral preferential access to the EU (GSP, GSP+, EBA). For all arrangements rules of origin apply and proof of origin should accompany consignments to the EU. Hereunder *serial numbers* are only set when a quota is defined by setting a limitation on amount with preferential access.

Trade measure	Serial number	Species/products	Conditions for market access
United Kingdom Trade and Cooperation Agreement "Brexit" ⁹	09.6002 09.6004	Chapter 03, heading 1604 + 1605 - Canned tuna (1604.14.00.00) - Canned tuna (1604.20.70.00)	0 % <u>Rules of origin apply:</u> 'Wholly obtained' Bilateral cumulation CC: Change in chapter from non-originating materials provides for preferential origin: - Canned tuna (3.000 tons (0 %)) - Canned tuna (4.000 tons (0 %))

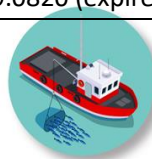
⁹ EUR-Lex - 22021A0430(01) - EN - EUR-Lex (europa.eu)

			<ul style="list-style-type: none"> - CN 1604.19 - Preparations of surimi <p>Tolerance rules apply (allowance for raw material from non-party countries)</p>
EEA (EU, Iceland, Norway, Liechtenstein)			
<i>Norway</i> (Reg. 992/95; rev. 1920/2004; rev. 2018/1607) ¹⁰	09.0702 (expired 30.4.2021) 09.0703 09.0710 (expired 30.4.2021) 09.0711 09.0712 (expired 30.4.2021) 09.0713 (expired 30.4.2021) 09.0714 (expired 30.4.2021) 09.0715 09.0716 09.0717 09.0718 09.0719 09.0720 09.0721 09.0722 09.0723 09.0724 09.0725 09.0726	Frozen Salmonidae Cod, dried, salted Herrings, whole, frozen Prepared fish, eels, shark fins Mackerel, whole, frozen Whole frozen fish, diff. species Herring, fillet and flaps Trout, whole frozen and fresh Pacific, atlantic salmon whole fresh Pacific, atlantic salmon frozen Salmon fillets Frozen and fresh <i>Salmonidae</i> Ling, fresh, whole Fish, whole, frozen or chilled Frozen meat of fish Herring, whole, frozen and fresh Mackerel, fresh Mackerel, frozen	3.000 (0) 13.250 (0) 39.750 (0) 400 (3% (10% prep. mackerel)) 37.500 (0 %) 3.300 (0 %) 83.400 (0 %) 500 (0 %) 6.100(0 %) 580 (0 %) 610 (0 %) 670 (0 %) 370 (0 %) 250 (0 %) 500 (0 %) 800 (0 %) 260 (0 %) 30.600 (0 %) 130 (0 %)

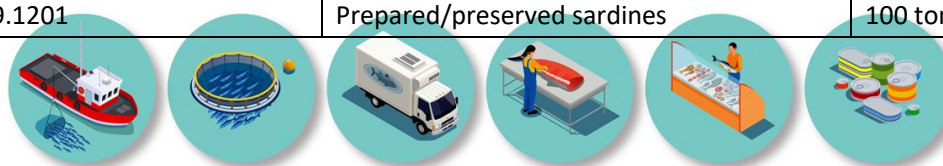
¹⁰ COMMISSION IMPLEMENTING REGULATION (EU) 2018/ 1607 - of 24 October 2018 - amending Council Regulation (EC) No 992/ 95 as regards Union tariff quotas for certain agricultural, processed agricultural and fishery products originating in Norway (europa.eu)



09.0727	Redfish, fresh and frozen	110 (0 %)
09.0728	Filets of freshwater fish	180 (0 %)
09.0729	Fresh or chilled fillets of diff. fish	130 (0 %)
09.0730	Fresh meat – flaps of herring, fresh	9.000 (0 %)
09.0731	Frozen fillets of fish	1.900 (0 %)
09.0732	Livers and roes, dried, salted or brined	450 (0 %)
09.0733	Smoked salmon	140 (0 %)
09.0734	Smoked fish (other than salmon)	250 (0 %)
09.0735	Fish, salted	1.440 (0 %)
09.0736	Herring, salted	950 (0 %)
09.0737	Frozen lobsters and shrimps	800 (0 %)
09.0738	Shrimps, shell-on	900 (0 %)
09.0739	Lobsters, fresh	170 (0 %)
09.0740	Prepared salmon meat	3.000 (0 %)
09.0741	Prepared/preserved herring	180 (0 %)
09.0742	Preserved sardinella, brislings, sprat	130 (0 %)
09.0743	Prepared/preserved Mackerel	5.500 (0 %)
09.0744	Prepared/preserved Eels, fish	300 (0 %)
09.0745	Prepared or preserved salmon meat	8.000 (0 %)
09.0746	Shrimps cooked/peeled	1.000 (0 %)
09.0748	Shrimps, otherwise prepared	50 (0 %)
09.0749 (expired 30.4.2021)	Prepared, preserved crab	10.500 (0 %)
09.0750 (expired 30.4.2021)	Shrimps, prepared/preserve	17.100 (0 %)
09.0752	Herring, spiced, cured in brine	44.000 (0 %)
09.0756	Herrings, whole, frozen	67.000 (0 %)
09.0818 (expired 30.4.2021)	Filets and flaps of herring, frozen	16.950 (0 %)
09.0819 (expired 30.4.2021)	Mackerel, filets and flaps, frozen	13.500 (0 %)
09.0820 (expired 30.4.2021)	Herring, filets, chilled	1.500 (0 %)

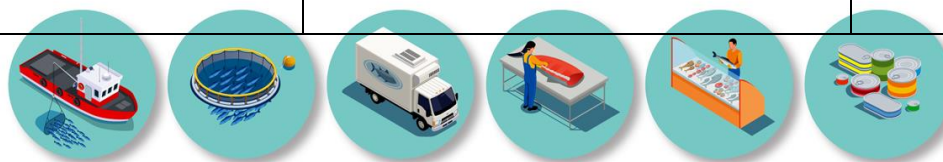


		Flours, meals and pellets (fit for human consumption)	
<i>Iceland</i> (Reg. 2016/1219)	09.0792 09.0812 (expired 30.4.2021) 09.0793 09.0794 09.0795 09.0796 09.0810 (expired 30.4.2021) 09.0797 09.0798 09.0700 (expired 30.4.2021)	Herring, frozen Herring, frozen Salmon, whole, fresh; filet Sole, turbot, Blue whiting Herring, salted, and in brine Norway lobster Norway lobster Prepared herring Prepared eel and fish (except herring and mackerel) Other prepared fish	950 (0 %) 1.400 (0 %) 50 (0 %) 250 (0 %) 1.750 (0 %) 50 (0 %) 1.474 (0 %) 2.400 (0 %) 50 (0 %) 3.685 (0 %)
EUR-MED			
<i>Turkey</i> (Decision 223/98)		Chapter 3, heading 1604 + 1605	0 %
<i>Lebanon</i> (Decision 356/2006)		Chapter 3, heading 1604 + 1605	0 %
<i>Egypt</i> (Decision 240/2010)		Chapter 3, heading 1604 + 1605	0 %
<i>Algeria</i> (Decision 690/2005)		Chapter 3, heading 1604 + 1605	0 %
<i>Morocco</i> (Decision 497/2012)		Chapter 3, heading 1604 + 1605	0 %
<i>Tunesia</i> (Decision 238/1998) (Reg. 747/2001)	09.1201	Chapter 3, heading 1604 + 1605 Prepared/preserved sardines	0 % 100 tons (0 %)

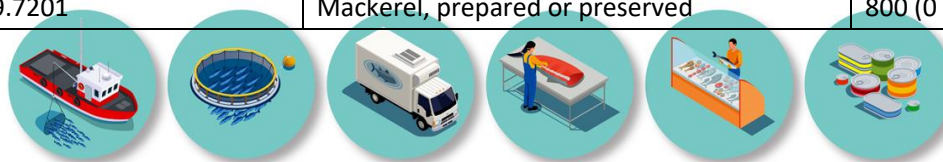


<i>Israel</i> (Decision 855/2009)		Chapter 3, heading 1604 + 1605	0 %
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Other agreements			
<i>Montenegro</i> (Decision 224/2010)	09.1516	Trout species/products	20 (0 %)
	09.1518	Carp products	10 (0 %)
	09.1520	Sea bream products	20 (0 %)
	09.1522	Sea bass products	20 (0 %)
	09.1524	Prep./preserved sardines	200 (6 %)
	09.1525	Prep./preserved anchovies	200 (12,5 %)
		Other Chapter 3, heading 1604 + 1605	(0 %)
<i>Albania</i> (Decision 332/2009)	09.1500	Trout species/products	50 (0 %)
	09.1501	Carp products	20 (0 %)
	09.1502	Sea bream products	20 (0 %)
	09.1503	Sea bass products	20 (0 %)
	09.1504	Prep./preserved sardines	100 (6 %)
	09.1505	Prep./preserved anchovies	1.000 (0 %)
		Other Chapter 3, heading 1604 + 1605	(0 %)
<i>Bosnia-Herzegovina</i> (Decision 474/2008)	09.1594	Trout species/products	500 (0 %)
	09.1595	Carp products	140 (0 %)
	09.1596	Sea bream products	30 (0 %)
	09.1597	Sea bass products	30 (0 %)
	09.1598	Prep./preserved sardines	50 (6 %)
	09.1599	Prep./preserved anchovies	70 (12,5 %)
		Other Chapter 3, heading 1604 + 1605	0 %



<i>Serbia</i> (Decision 36/2010)		Chapter 3, heading 1604 + 1605	0 %
<i>Kosovo</i> (Decision 342/2016)		Chapter 3, heading 1604 + 1605	0 %
<i>South Africa</i> (Decision 1623/2016)		Chapter 3, heading 1604 + 1605	0 %
<i>Chile</i> (Reg. 312/2003) (Decision 979/2002)	09.1934 09.1935 09.1936 09.1940	Hake, fresh or chilled Fish filets, dried, salted or brined Prepared or preserved fish Fish, whole and filets, frozen Other chapter 3, headings 1604 and 1606	5.000 (0 %) 40 (0 %) 50 (1/3 of MFN) 725 (0 %) (0 %)
<i>Mexico</i> (Reg. 1362/2000) (Dec. 415/2000)	09.1853 09.1854	Tuna, preserved/prepared (1604.14.21.00) Tunafilets ("loins") (1604.14.36.00) Other chapter 3, headings 1604 and 1606	12.500 (6,8 %) 6.000 (6 %) 0 pct.
<i>Peru</i> (Reg. 404/2013)	09.7195 09.7196 09.7197 09.7198 09.7199 09.7200 09.7201	Frozen mackerel Frozen anchovies Horse mackerel Frozen squid Squid, dried, salted or brined Filets of mackerel, prepared Mackerel, prepared or preserved	4.000 (0 %) 120 (0 %) 60 (0 %) 4.200 (0 %) 2.500 (0 %) 2.000 (0 %) 800 (0 %)



(Decision 735/2012)	09.7202 09.7203 09.7204 09.7205	Mackerel, prepared or preserved Anchovies, prepared or preserved Anchovies prepared or preserved (not whole) Molluscs, prepared or preserved Other chapter 3, headings 1604 and 1606	20 (0 %) 400 (0 %) 30 (0 %) 500 (0 %) 0 %
<i>Ecuador</i> (Decision 2369/2016)		Chapter 3, heading 1604 + 1605	0 %
<i>Central America (CAMER)</i> (Decision 734/2017)		Chapter 3, heading 1604 + 1605	0 %
<i>Moldova</i> (decision 492/2024), <i>Ukraine</i> (decision 295/2014), <i>Georgia</i> (decision 494/2014)		Chapter 3, heading 1604 + 1605	0 %
<i>OCT (28 Overseas Countries and Territories)</i> <i>Greenland</i> (Decision 2021/1764)		Chapter 3, headings 1604 + 1605	0 %
<i>African, Caribbean and Pacific</i> (ACP) Group of States Ca. 79 countries (Decision 196/12)		Chapter 3, headings 1604 + 1605	GSP-rates, reduced or zero rates by bilateral agreements, quotas



GSP (Reg. 978/2012, "GSP Regulation" ¹¹) Standard GSP 15 countries. Economic criteria (Level of income)		Chapter 3, headings 1604 + 1605	Reduced or zero rates
GSP+ (Reg. 978/2012) 8 countries Econ. criteria and 27 int. conventions ¹²		Chapter 3, headings 1604 + 1605	0 %
EBA (Reg. 978/2012) (‘Everything but arms’) 48 countries, least developed		Chapter 3, headings 1604 + 1605	0 %
<i>Ceuta and Melilla</i> (Reg. 1104/2004)		Chapter 3, headings 1604 + 1605	0 %
<i>Colombia</i> (Decision 735/2012)		Chapter 3, headings 1604 + 1605	0 %
<i>Madagascar, Mauritius, Seychelles, Zimbabwe</i> (Decision 2017/1923)	09.1618 (expire end 2022) 09.1619 (expire end 2022)	Preserved tuna Tuna loins	8.000 (0 %) 2.000 (0 %)

¹¹ **CL2012R0978EN0130010.0001.3bi_cp 1..1 (europa.eu)**

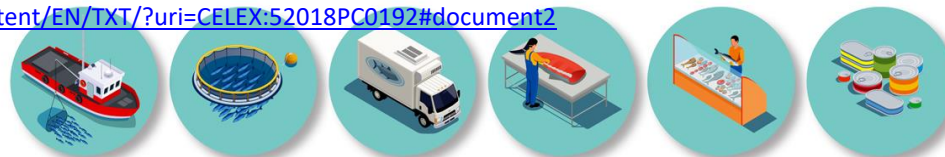
¹² Special incentive arrangement for sustainable development and good governance



Faroe Islands (Reg. 2471/1999; rev. 54/2009) ¹³ (Decision 456/99)	09.0671	Trout (live, whole, frozen filets)	700 (0 %)
	09.0675	Prepared or preserved <i>Salmonidae</i>	400 (0 %)
	09.0681	Prepared or preserved fish	1.200 (0 %)
	09.0679	Shrimps, prawns, <i>N. norvegicus</i>	2.000 (0 %)
	09.0672	Coalfish, salted and dried	750 (0 %)
	09.0674	Common whelk (<i>Buccinum Undatum</i>)	1.200 (0 %)
	09.0676	Crab (<i>Geryon affinis</i>), frozen	750 (0 %)
		Other Chapter 3, heading 1604 + 1605	0 %
Andorra (Dec. 680/1990)		Chapter 3, headings 1604 + 1605	0 %
San Marino (Reg. 245/2002)		Chapter 3, headings 1604 + 1605	0 %
Thailand (Decision 847/2006)	09.0704	Prep. of tuna, skipjack, other fish of genus <i>Euthynnus</i> (1604 20 70 00)	1816 (0 %)
	09.0706	Prep. of sardines, bonito, mackerel (<i>Scomber scombrus</i> ; <i>Scomber japonicus</i>), fish of species <i>Orcynopsis unicolor</i> (1604 20 50 00)	423 (0 %)
Other FTA's			
Japan ¹⁴		Chapter 3, heading 1604 + 1605	Tariff elimination in stages 0-16 years

¹³ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:31999R2471&from=EN>

¹⁴ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52018PC0192#document2>



<i>Canada</i> ¹⁵ (Decision 37/2017, “CETA”) (Provisionally into force until full ratification) (Reg. 1772/2017) (Reg. 1781/2017) (Reg. 1772/2017)	09.8404 09.8310 09.8403	Chapter 3, heading 1604 + 1605 Prepared/preserved shrimps Prepared/preserved shrimps Cod fillets, frozen	Tariff elimination 0 - 8 years in stages Product specific rules of origin 23.000 (0 %) 5.000 (7,5 %) 1.000 (0 %)
<i>Vietnam</i> ¹⁶ (Decision 753/2019) (Reg. 1024/2020)	09.8204 09.8205	Chapter 3, headings 1604 + 1605 Tuna products Surimi preparations	Tariff elimination in stages for Pangasius file; prep. shrimps; crangon crangon; tuna “loins” 11.500 (0 %) 500 (0 %)
<i>Singapore</i> (Decision 1875/2019)		Chapter 3, heading 1604 + 1605	Zero or reduced rates
<i>South Korea</i> ¹⁷ (Decision 265/2011)		Chapter 3, headings 1604 + 1605	0 %

¹⁵ [https://eur-lex.europa.eu/legal-content/DA/TXT/?uri=CELEX:22017A0114\(01\)](https://eur-lex.europa.eu/legal-content/DA/TXT/?uri=CELEX:22017A0114(01))

¹⁶ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L:2020:186:TOC>

¹⁷ [https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22011A0514\(01\)&from=DA](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22011A0514(01)&from=DA)



Erga Omnes: Quotas, eliminated duties and import ceilings ¹⁸

Quotas or unlimited import at zero or reduced rates. Set within the framework of GATT or WTO or bilaterally EU – third countries, while extended to all third countries at equal terms to comply to the provision of Most Favored Nation-treatment within the WTO.

Trade measure	Serial number	Species/products	Conditions for market access, tons (%)
GATT-bound (Reg. 32/2000)	09.0006 09.0007 09.0009 09.0045 09.0046 09.0047 09.0048	Herring (whole fresh/frozen; filets) Cod (dried or salted) Silver hake (whole, fresh or frozen) Fish, <i>Coregonus</i> (whole frozen) Crayfish, cooked with dill Shrimps (cooked, peeled) Fillets (<i>Alloctytus spp. Pseudocyttus maculatus</i>)	34.000 (0 %) (16.6.-14.2) 25.000 (0 %) 2.000 (8 %) 1.000 (5,5 %) 3.000 (0 %) 500 (0 %) 200 (0 %)
EU-US “Mini-deal” (Reg. 2020/2131) (Expiry at 31.7.2025)		Frozen rock lobster and other sea crawfish (0306 11 90) Frozen lobsters (whole) (0306 12 10) Frozen lobsters (excl. whole) (0306 12 90) Live lobsters (0306 32 10) Products of meat of crustaceans, molluscs and other aquatic invertebrates, prepared meals (1604 20 05)	(0 %) (0 %) (0 %) (0 %) (5 %)
Thailand			

¹⁸ Means ‘Towards all’ i.e. towards all third countries on equal terms



(Decision 847/2006 – part on <i>erga omnes</i> quotas)	09.0705	Prep. of tuna, skipjack, other fish of genus <i>Euthynnus</i> (1604.20.70.00)	742 (0 %)
	09.0707	Prep. of sardines, bonito, mackerel (<i>Scomber scombrus</i> ; <i>Scomber japonicus</i>), fish of species <i>Orcynopsis unicolor</i> (1604.20.50.00)	631 (0 %)
EU Common Customs Tariffs (Reg. 1577/2020)		Herring and products there-off	15.2.-15.6 (0 %)
		Mackerel species and products there-off	15.2.-15.6 (0 %)
		Brisling or Sprat and products there-off	15.2.-15.6 (0 %)

Autonomous Tariff Quotas (ATQ) *erga omnes*¹⁹ ('End use')

ATQ's are aiming at ensuring adequate supply of fish and fishery products to EU processing industry. Quotas are available at zero or reduced rates while restricted to qualifying operations within the EU (listed in Article 4, Reg. 2020/1706). Customs surveillance ('End use') and record keeping procedures after importation. Authorizations required for operators.

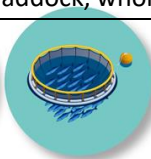
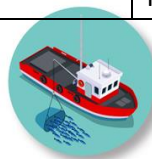
Trade measure	Serial number	Species/products	Conditions for market access
Autonomous Tariff Quotas ('ATQ') (Reg. 2020/1706) ²⁰	09.2503	Flatfish spp. whole, frozen	7.500 (0 %)
	09.2504	Trout, whole, fresh	10.000 (5 %)
	09.2505	Chub Mackerel, whole/fillets/flaps	5.000 (7,5 %)
	09.2746	Southern red snapper, whole, fresh	1.500 (0 %)

¹⁹ Erga omnes means 'Towards all' i.e., for all 3rd countries on equal terms

²⁰ EUR-Lex - 32020R1706 - EN - EUR-Lex ([europa.eu](https://eur-lex.europa.eu/))



For a 3 years period 2021-2023	09.2748	Hard fish roes, fresh or frozen, salted or brined	5.700 (0 %)
	09.2750	Hard fish roes for manufacture of caviar subst.	1.200 (0 %)
	09.2754	Anchovies, frozen	5000 (0 %)
	09.2759	Cod, fresh or frozen, whole	110.000 (0 %)
	09.2760	Hake, whole, frozen	10.000 (0 %)
	09.2761	Blue grenadier, frozen fillets	17.500 (0 %)
		Rock lobster/sea crawfish, live, chilled, frozen	200 (0 %)
	09.2762	Cod, salted or brined	2.000 (0 %)
	09.2765	Anchovies, salted or brined	1.500 (0 %)
	09.2770	Surimi, frozen	60.000 (0 %)
	09.2772	Pacific hake, fillets, frozen	40.000 (0 %)
	09.2774	Cod, frozen fillets	50.000 (0 %)
	09.2776	Alaska Pollack	340.000 (0 %)
	09.2777	Flatfish, frozen fillets	10.000 (0 %)
	09.2778	Pod of squid, frozen with skin and fins	20.000 (0 %)
	09.2785	Squid, frozen, whole or tentacles and fins	5.000 (0 %)
	09.2786	Herring, whole (frozen or fresh) or fillets	10.000 (0 %)
	09.2788	'Loins' of tunas and skipjack	35.000 (0 %)
	09.2790	Herrings, spiced and cured	5.000 (10 %)
	09.2792	Shrimps, cooked and peeled (cold water)	4.500 (0 %)
	09.2794	Shrimps, shell-on (cold water)	2.000 (0 %)
	09.2798	Shrimps, shell-on (cold water) <i>P. Jordani</i>	2.000 (0 %)
	09.2800	Shrimps, shell-on or raw/peeled (warm water)	48.000 (0 %)
	09.2802	Crayfish tails, cooked	2.500 (0 %)
	09.2804	Squid, <i>Loligo pealei</i> , frozen	1.000 (0 %)
	09.2821	Pacific salmon, whole frozen or fillets, frozen	10.000 (0 %)
	09.2822	Piked dogfish, whole and fillets, frozen	2.000 (0 %)
	09.2823	Haddock, whole, frozen or chilled	3.500 (0 %)



(Reg. 2021/1203) ²¹ Applies from May 1 st , 2021)	09.2824	Shrimps <i>pleoticus muelleri</i> , shell-on or raw/peeled	8.000 (0 %)
	09.2826	Squid (<i>Loligo gahi</i>) frozen	75.000 (0 %) 2021-2023
	09.2508	Herring, spiced in brine	15.000 (0 %) 1.5.2021-30.4.2022
	09.2509	Herring, whole, frozen	7.500 (0 %) 1.5.2022-31.10.2022
	09.2510	Chilean jack mackerel, whole, frozen	10.000 (0 %) 1.5.2021-30.4.2022
	09.2512	Fish of <i>Tranchurus</i> spp., whole, frozen	5.000 (0 %) 1.5.2022-31.10.2022
		Cobia, whole, frozen	1.650 (0 %) 1.5.2022-31.10.2022
		Rays and skates, whole, frozen	
		Gilt-head sea bream, whole, frozen	
		Filets of herring, frozen	25.000 (0 %) 1.5.2021-30.4.2022
	09.2513	Flaps of herring, frozen	12.500 (0 %) 1.5.2022-31.10.2022
	09.2514	Fillets of redfish (<i>Sebastes</i> spp.)	1.300 (0 %) 1.5.2021-30.4.2022
			650 (0 %) 1.5.2022-31.10.2022

²¹ Council Regulation (EU) 2021/1213 of 19 July 2021



Instruments based on derogations on origin (with or without quotas)

EU has granted individual countries or groups of countries derogation from rules of origin allowing for import to the EU duty free or at reduced rates also for products originating in other non-party states. The system of Pan-Euro-Mediterranean cumulation of origin allows for such derogations via the application of *diagonal cumulation* between the EU, EFTA States, Turkey, the countries which signed the Barcelona Declaration, the Western Balkans and the Faroe Islands. It is based on a network of Free Trade Agreements having identical origin protocols.

Trade measure	Serial number	Species/products	Conditions for market access, tons (%)
Quotas of products brought in free circulation and transshipped in <i>Greenland, St. Pierre and Miquelon</i> (Regulation 660/2002)	09.1641 (<i>Trans Sct. Pierre & Miquelon</i>)	Halibut (whole/filet) Lobsters and prawns/shrimps	2.000 (0 %)
	09.0692 (<i>Trans Greenland</i>)	Halibut (whole/filet) Prawns/shrimps	10.000 (0 %)
<i>South Korea</i> ²² (Reg. nr. 1093/2011)	09.2450	Preparations of surimi	3.500 (0 %)
<i>Capo Verde</i> (Reg. nr. 2021/966)	09.1602	Prepared/processed filet of tuna spp.	5.000 (0 %) 2021 3.500 (0 %) 2022

²² [https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22011A0514\(01\)&from=DA](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22011A0514(01)&from=DA)



	09.1647	Prepared/processed filet of mackerel spp.	2.500 (0 %) 2023 3.000 (0 %) 2021 2.500 (0 %) 2022
	09.1648	Prepared/processed filet of frigate tuna or mackerel	2.000 (0 %) 2023 1.000 (0 %) 2021 1.000 (0 %) 2022 1.000 (0 %) 2023
<i>Mauritius</i> (Decision 1/2021)	09.1611	Snoek (<i>barracoota</i>), salted	100 (0 %) 7.8.2021-6.8.2022
<i>Papa New Guinea, Fiji, Samoa, Solomon Islands</i> (Pacific States EPA)		Chapter 3, heading 1604 + 1605	0 % (Global sourcing)
<i>United Kingdom</i> Trade and Cooperation Agreement			<i>See notes in the section 2.1. on the TCA</i>
<i>Pan-Euro-Mediterranean rules on origin (PEM)</i> (Com. Notice 2021/C 418/12)		Chapter 3, heading 1604 + 1605	Export to EU on preferential terms depending on the exporting state



EU Trade defense instruments

Antidumping or countervailing duties are a trade policy instrument applicable to products to the EU to counteract harm to EU businesses due to third country dumping or subsidy practices. Currently only one case applies. Also, EU has in place an instrument to apply restrictive measures against countries allowing non-sustainable fishing.

Trade measure	Species/product	Conditions for market access
Countervailing duty on Rainbow trout from Turkey (aquaculture) (Reg. 2021/823)	<u>Rainbow trout:</u> ex 03019190 ex 03021180 ex 03031490 ex 03044290 ex 03054300	Countervailing duty rates of 1,5 %; 6,7 %; 6,9 %; 7,6 %; 8,0 %; 9,5 % (Individual rates specified for 34 producers based in Turkey)
Restrictive instruments applied against import from countries allowing non-sustainable fishing in a stock of common interest (Regulation 1020/2012)	None currently applies	None currently applies
Regulation (EC) No 1005/2008 and No 1010/2009 ("IUU-regulation")	Fish and fishery products covered by IUU-regulation	Red card. Import not allowed: <ul style="list-style-type: none"> • Cambodia since November 2013 • St Vincent and the Grenadines since May 2017 • Comoros since May 2017



SFPA's: Union vessels Fishing outside the EU

More than 20% of Union vessels catches are taken outside Union waters. 9.3% of EU catches (2014-18) are made in the EEZ of third countries engaged with the EU in **fishing agreements**, 2.2% in other third countries, while another 10% are taken in the high seas, mainly tropical tunas in regions managed by tuna **regional fisheries management organisations** (RFMOs). As a major fishing power, and the largest single market for fisheries products in the world, the EU also plays an important role in promoting better governance through a number of **international organisations**. It promotes developing and implementing policy on fisheries management and – more generally – the implementation of the Law of the Sea. The EU works closely with its partners from around the globe through the United Nations system, including the Food and Agriculture Organisation (FAO), as well as in other bodies, such as the Organisation for Economic Co-operation and Development (OECD). All the "external" fishing activities of Union vessels: in the EEZ of third countries whether or not covered by a bilateral agreement (direct authorisations regime), in RFMO areas, in the high seas not under RFMOs, must be specifically authorised by the Flag Member State. Authorisations are to be granted under predefined conditions (see Regulation on the sustainable management of external fishing fleets – “SMEFF Regulation” below) and have to be monitored constantly to check those conditions. Even outside Union waters, EU vessels continue to be submitted to EU Control rules.

Lists of authorisations:

Find **here** where and when EU vessels are authorised to fish in external waters (downloadable excel file updated weekly).

SMEFF Regulation 2017/2403): **EUR-Lex - 32017R2403 - DA - EUR-Lex (europa.eu)**



Annex 3. Additional external documentation

- **European Commission**
 - [Trade Data](#)
 - [Production Data](#)
 - [Utilisation of Preferential Trade Instruments](#)
- **EU IUU Coalition**
 - [Factsheet on Live Weight Conversion Factors](#)

