



OUTLOOK FOR EUROPEAN SEAFOOD MARKET – FOCUS ON CENTRAL AND EASTERN EUROPE

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V4 Freshwater Aquaculture Conference

26 April 2018, Szarvas, Hungary

Eurofish
INTERNATIONAL ORGANISATION

EUROPEAN TRADE OF FISHERIES PRODUCTS (2017)



Extra-EU import:
5.9 million tonnes (-1% to 2016)
EUR 25.3 billion (+4% to 2016)



Extra-EU export:
2 million tonnes (+6% to 2016)
EUR 5 billion (+7% to 2015)



Intra-EU export:
6.4 million tonnes (+4% to 2016)
EUR 26.6 billion (+6% to 2016)

CENTRAL AND EASTERN EUROPEAN COUNTRIES

Extra-EU import

355 820 tonnes

EUR 915 million



Extra-EU export

172 440 tonnes

EUR 381 million



Intra-EU export

809 000 tonnes

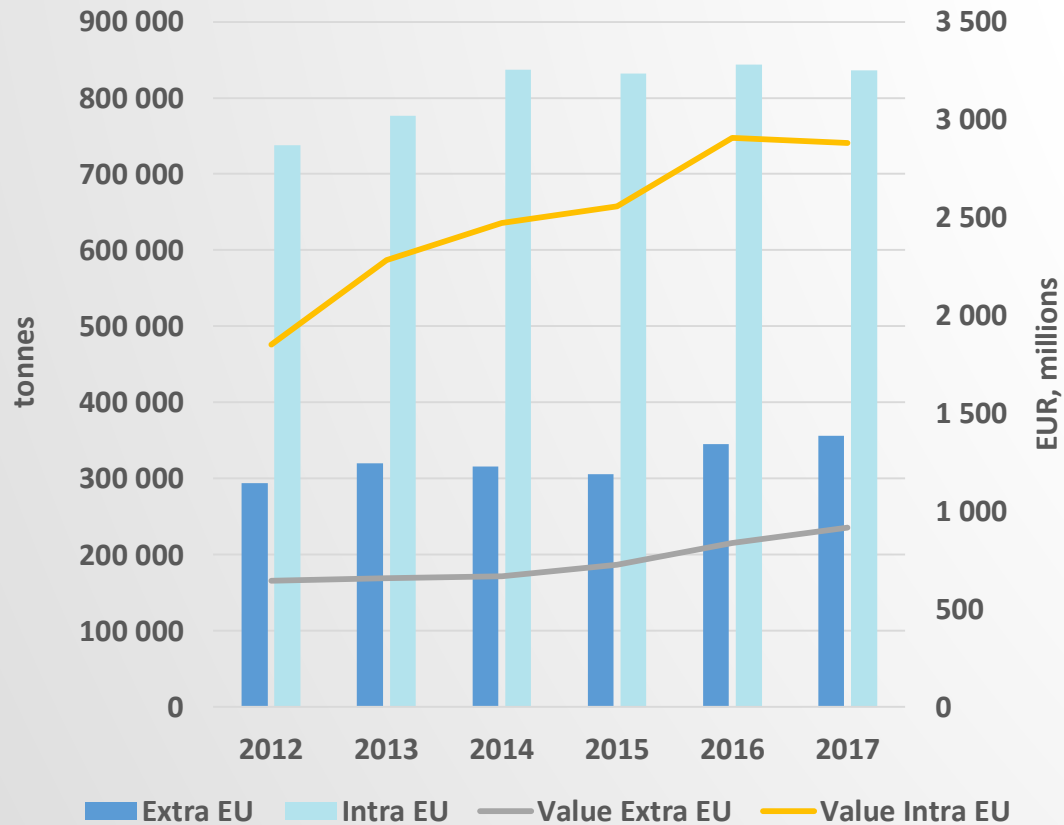
EUR 3.2 billion



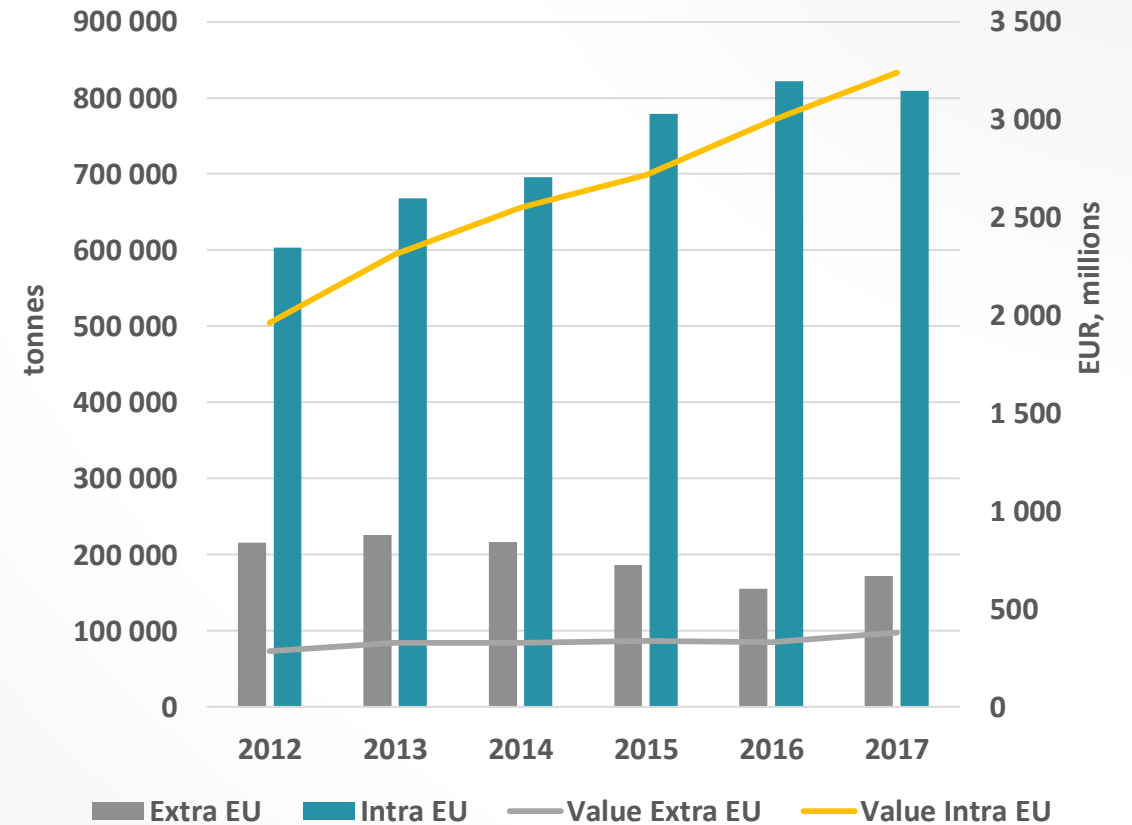
- Bulgaria
- Croatia
- Czech Republic
- Estonia
- Hungary
- Latvia
- Lithuania
- Poland
- Romania
- Slovakia
- Slovenia

CEE TRADE OF FISH AND SEAFOOD

Import into CEE countries

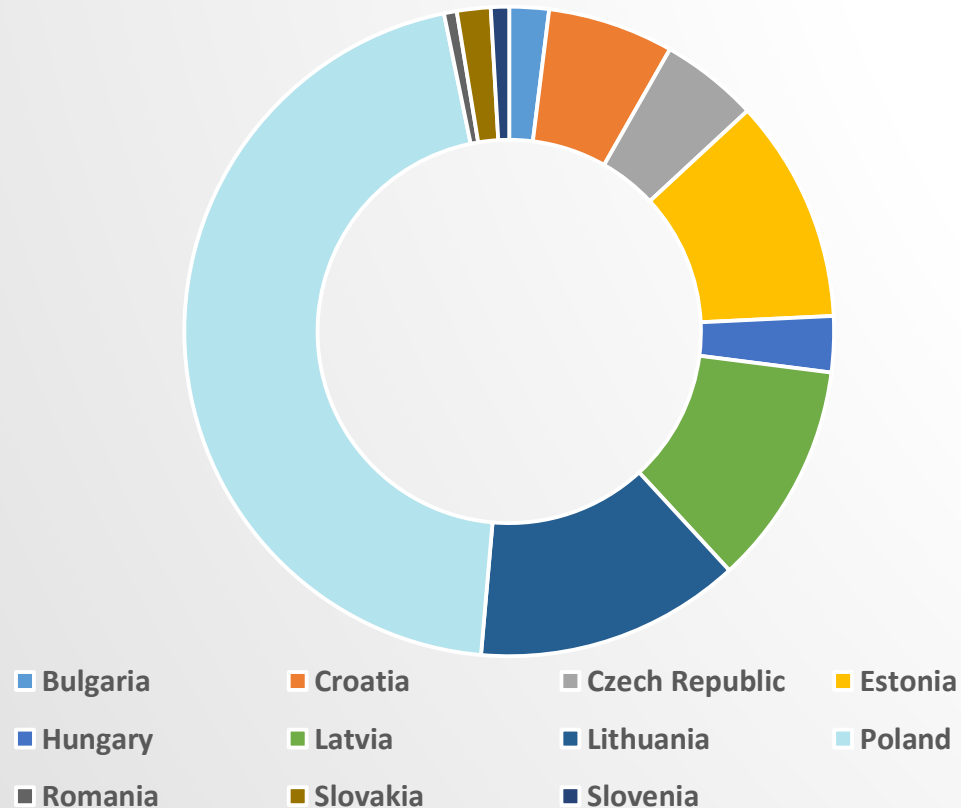


Export from CEE countries



CENTRAL AND EASTERN EUROPEAN COUNTRIES

Export of fish and seafood products from selected CEE countries in 2017 (% , volume)

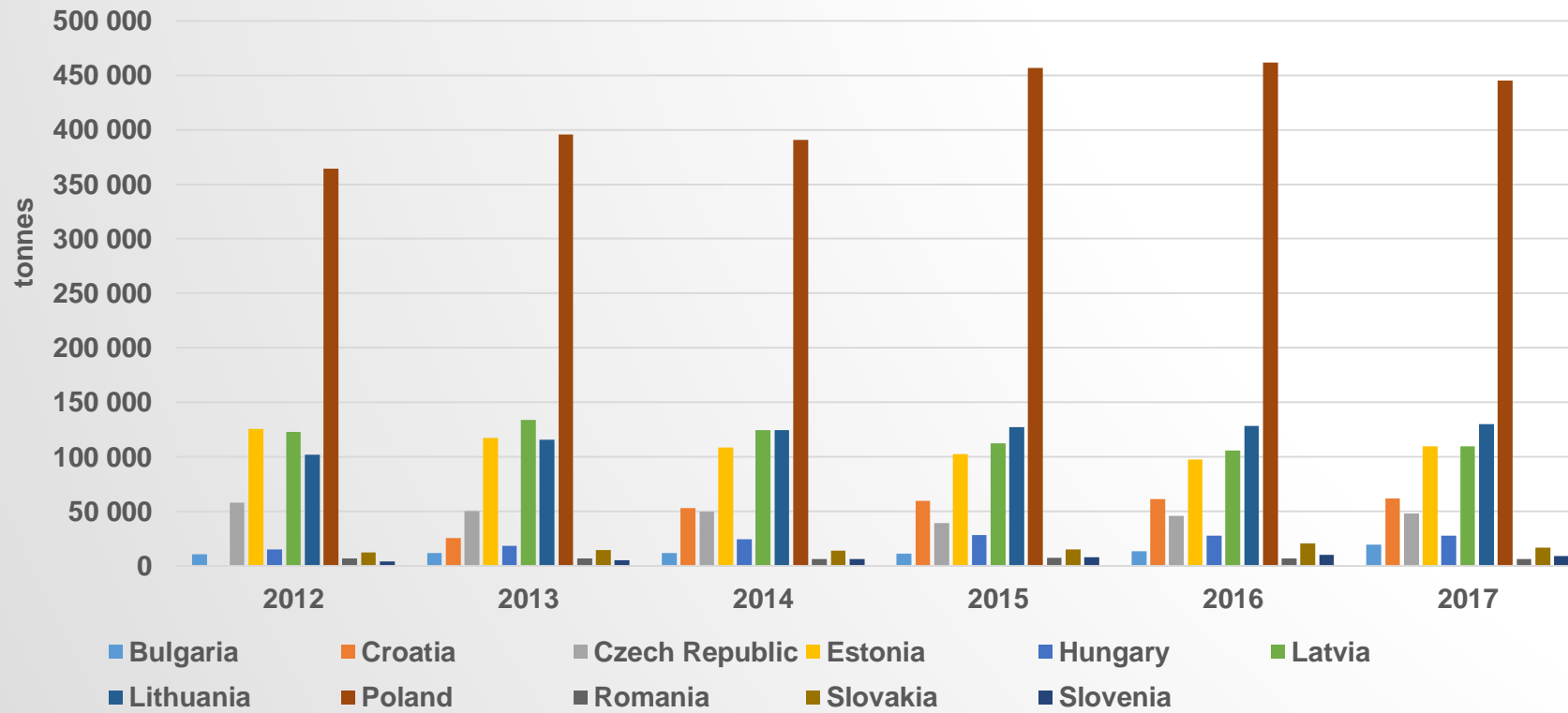


	2017 (tonnes)	% (share)
Bulgaria	19 304	2%
Croatia	61 546	6%
Czech Republic	47 758	5%
Estonia	109 254	11%
Hungary*	8 474	1%
Latvia	109 260	11%
Lithuania	129 862	13%
Poland	445 449	46%
Romania	6 264	1%
Slovakia	16 455	2%
Slovenia	8 921	1%
Total	962 547	100%

Source: EUMOFA, 2018, Hungary data for 2017 based on the national statistics (KSH)

EXPORT FROM CEE COUNTRIES

Export of fisheries and aquaculture products from CEE countries

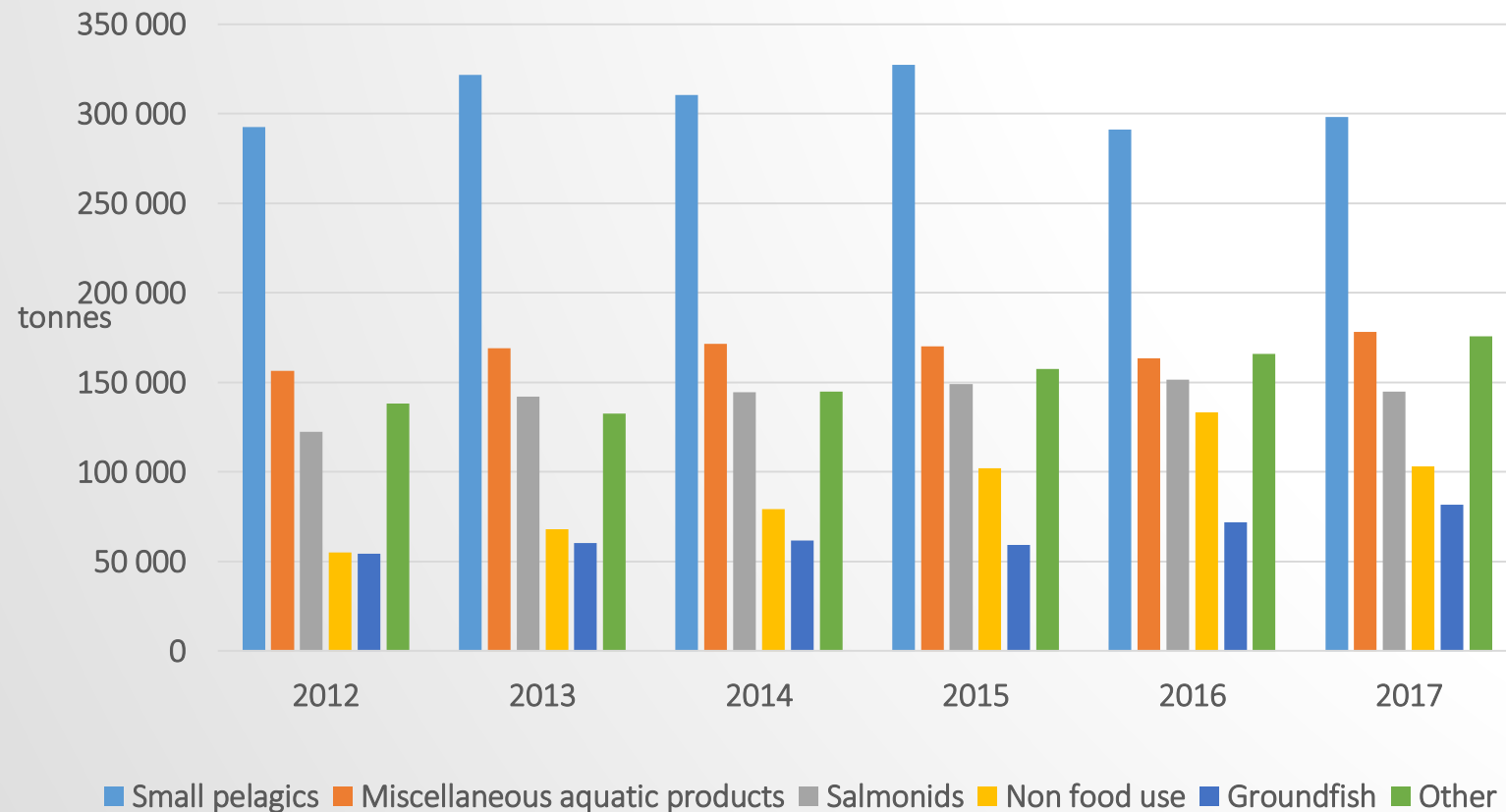


	2017/2012 (%)
Bulgaria	+87%
Croatia	+144%
Czech Republic	-17%
Estonia	-13%
Hungary	+20%
Latvia	-11%
Lithuania	+28%
Poland	+22%
Romania	-1%
Slovakia	+39%
Slovenia	+117%
Total	+20%

Source: EUMOFA, 2018

EXPORT FROM CEE COUNTRIES

Export by commodity groups



	2017 (tonnes)	2017/2012
Small pelagics	298 092	+2%
Miscellaneous aquatic products	178 146	+14%
Salmonids	144 822	+18%
Non food use	103 223	+88%
Groundfish	81 536	+50%
Other	175 581	+27%
Totals	981 400	+20%

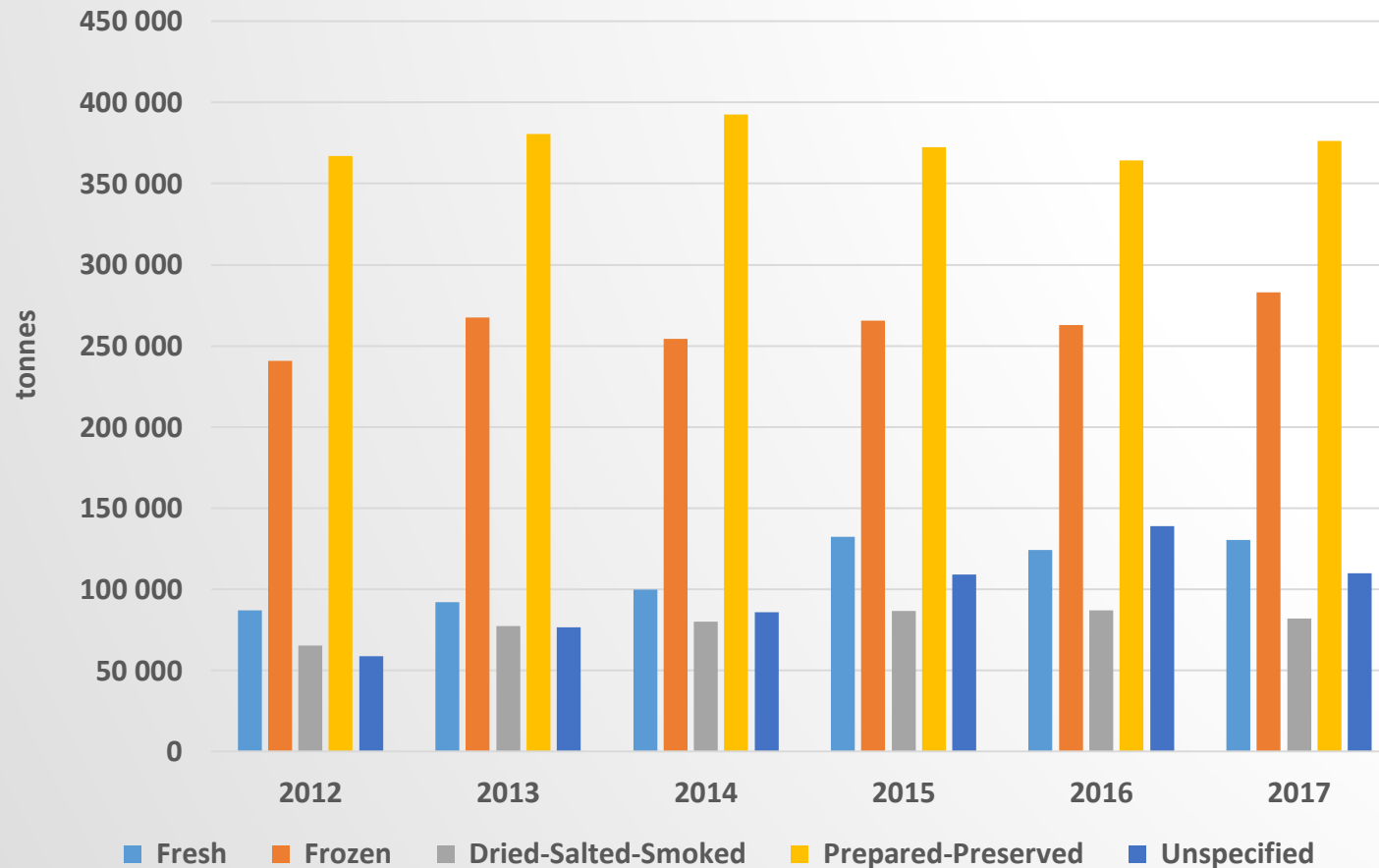
EXPORT FROM CEE COUNTRIES

	2012	2013	2014	2015	2016	2017	2017/2012
Other products	122 899	134 472	132 313	128 671	121 421	132 481	+8
Salmon	104 572	123 196	124 044	128 343	128 073	121 825	+16
Herring	98 813	101 829	109 238	128 367	119 308	118 328	+20
Sprat	103 545	106 002	77 552	95 910	82 396	87 343	-16%
Other marine fish	71 970	66 508	73 443	79 645	82 719	88 456	+23%
Other non-food use	32 090	38 384	49 121	74 479	109 152	76 574	+139%
Cod	28 155	30 207	31 911	31 445	37 778	45 744	+62%
Sardine	6 468	17 781	29 219	27 359	30 616	29 468	+356%
Surimi	31 540	33 391	37 876	39 797	40 289	43 195	+37%
Other	218 778	242 322	247 885	231 217	225 370	237 987	+8%
Totals	818 830	894 091	912 601	965 233	977 122	981 400	+20%

Source: EUMOFA, 2018

EXPORT FROM CEE COUNTRIES

Export by preservation state



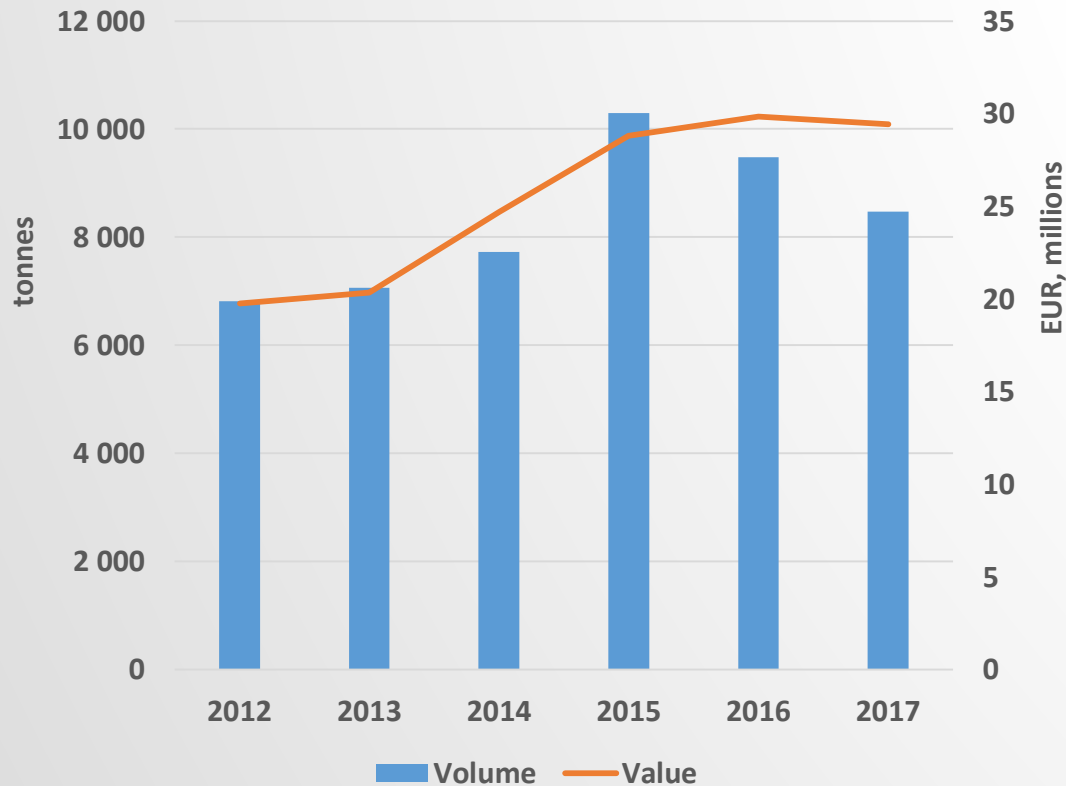
	2017	2017/2012
Prepared-Preserved	376 279	+3%
Frozen	282 864	+18%
Fresh	130 507	+50%
Unspecified	109 901	+87%
Dried-Salted-Smoked	81 847	+25%
Totals	981 400	+20%

HUNGARY



HUNGARY

Hungarian export of fish and seafood products



Export from Hungary

2017 Live fish

• 5 723 tonnes (+54% to 2012)



2017 Fresh or chilled fish

• 928 tonnes (+310% to 2012)



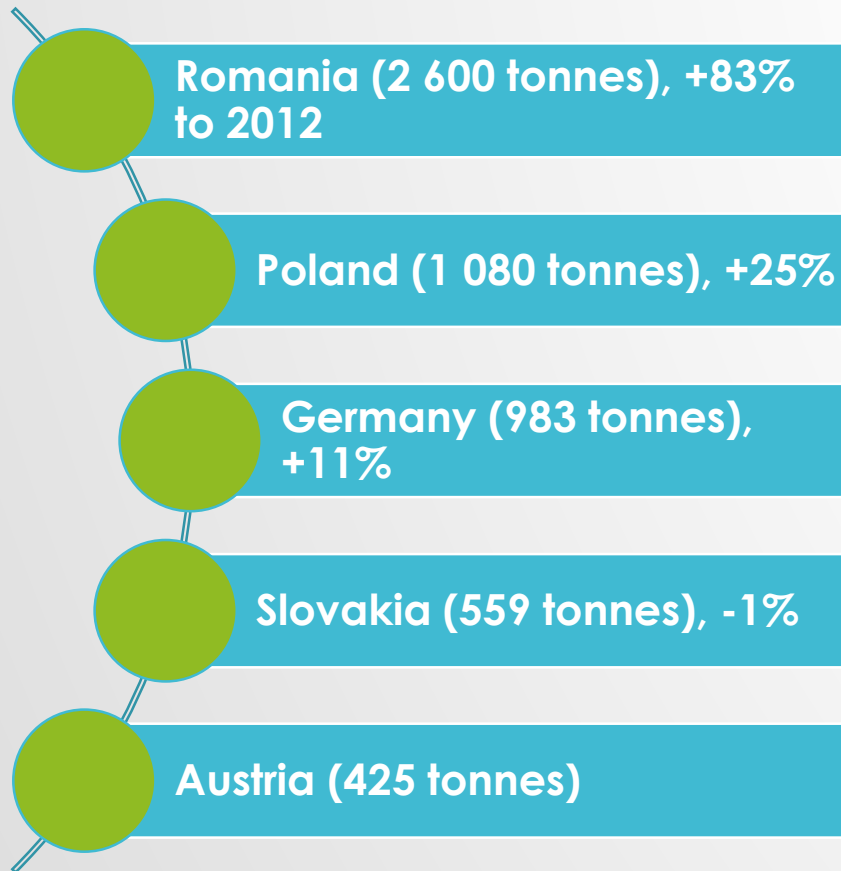
2017 Fish fillets

• 660 tonnes (-15% to 2012)

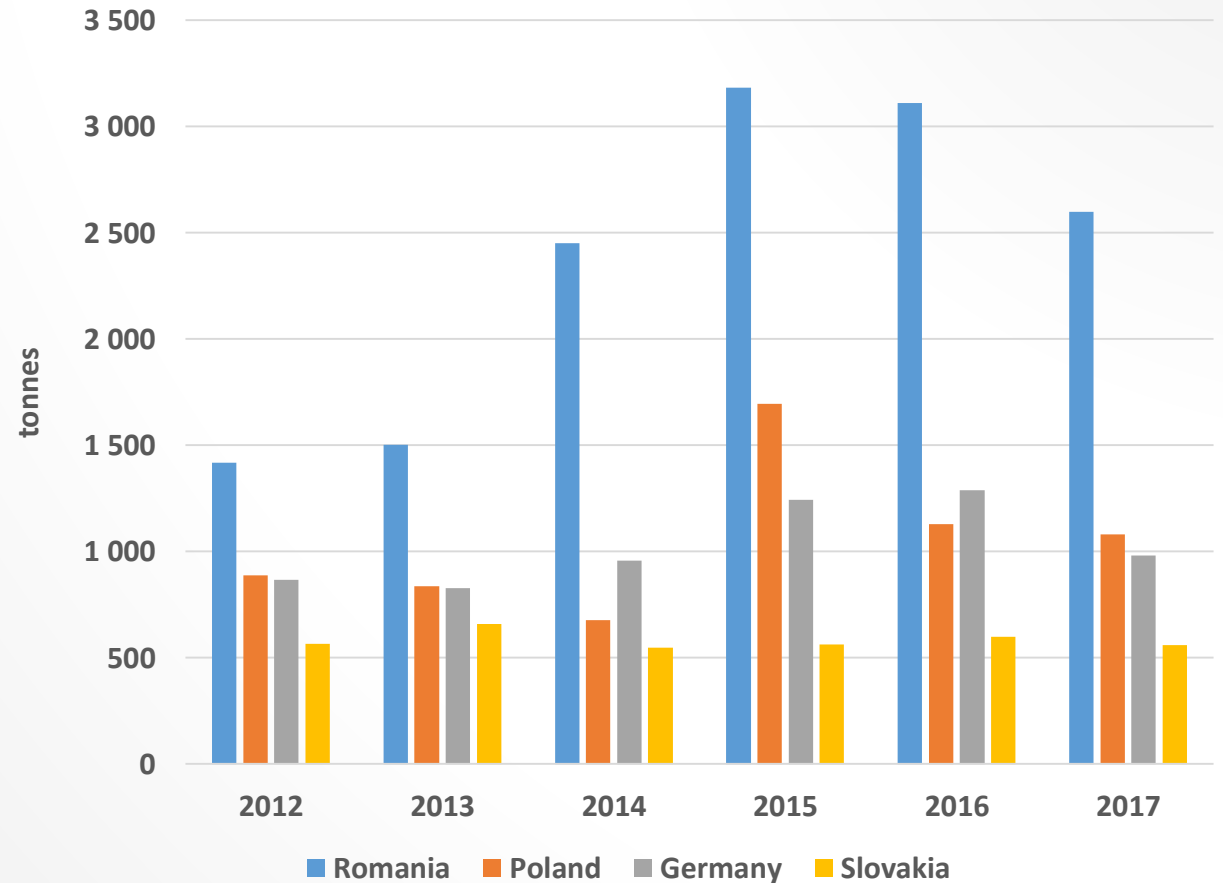


Total exports (2017): 8 474 tonnes (+20% to 2012)

HUNGARY



Top-5 markets for Hungarian export

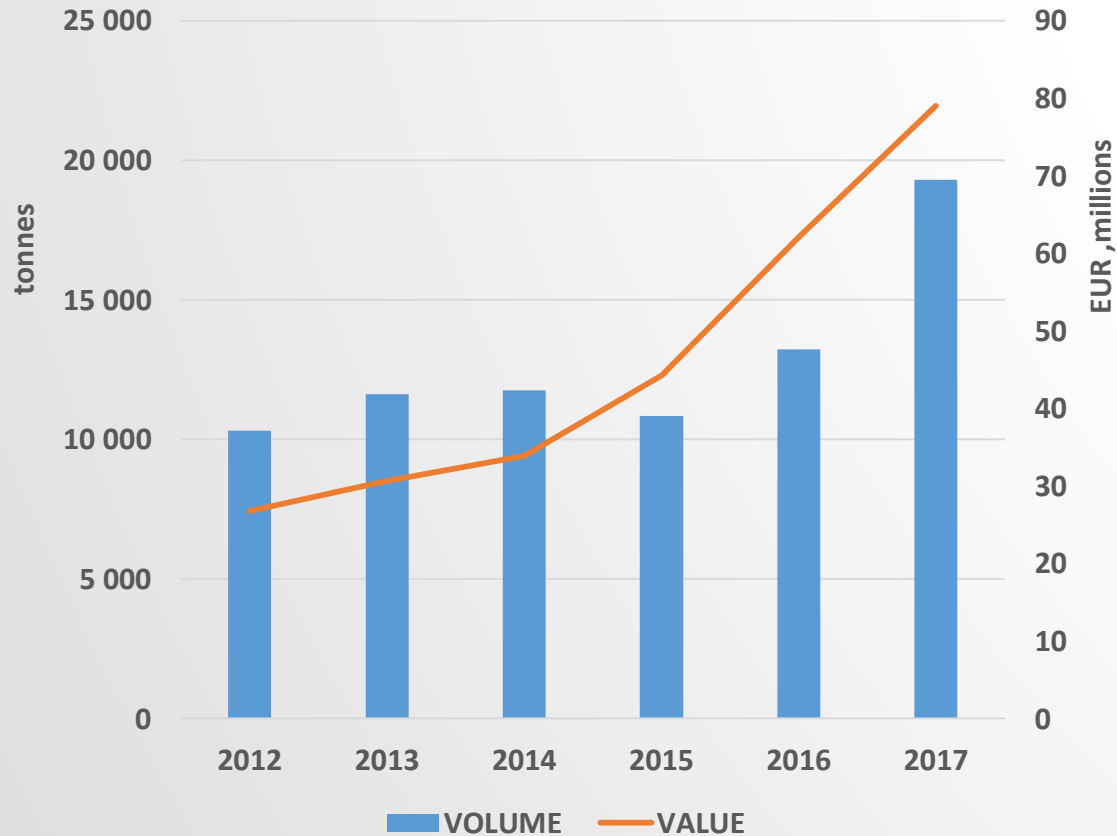


BULGARIA



BULGARIA

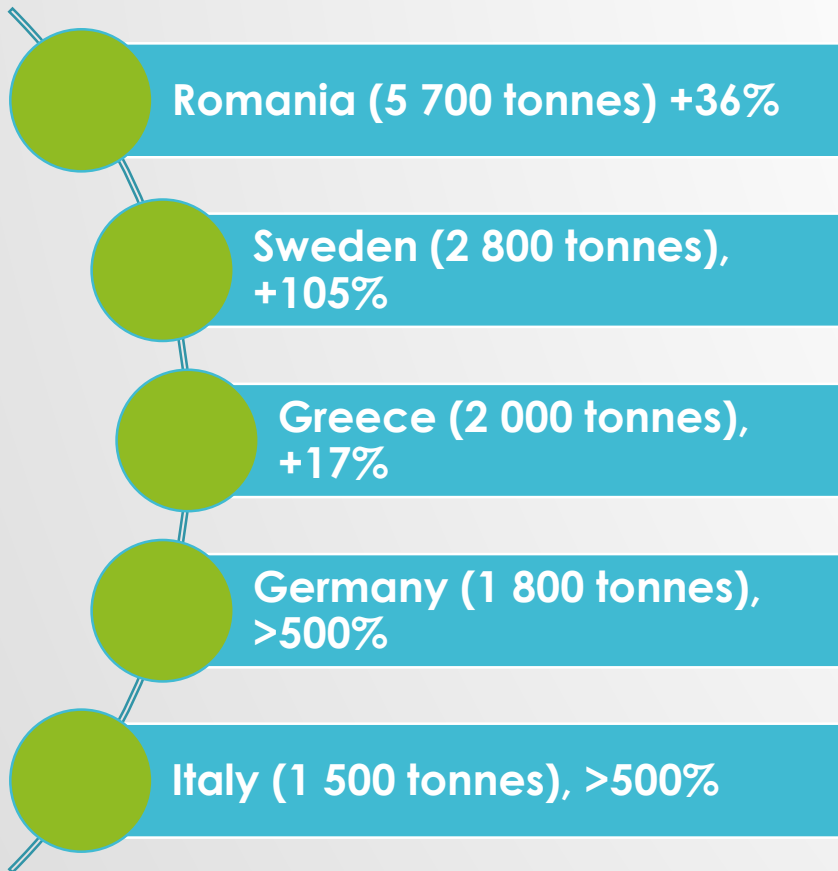
Bulgarian export of fish and seafood products



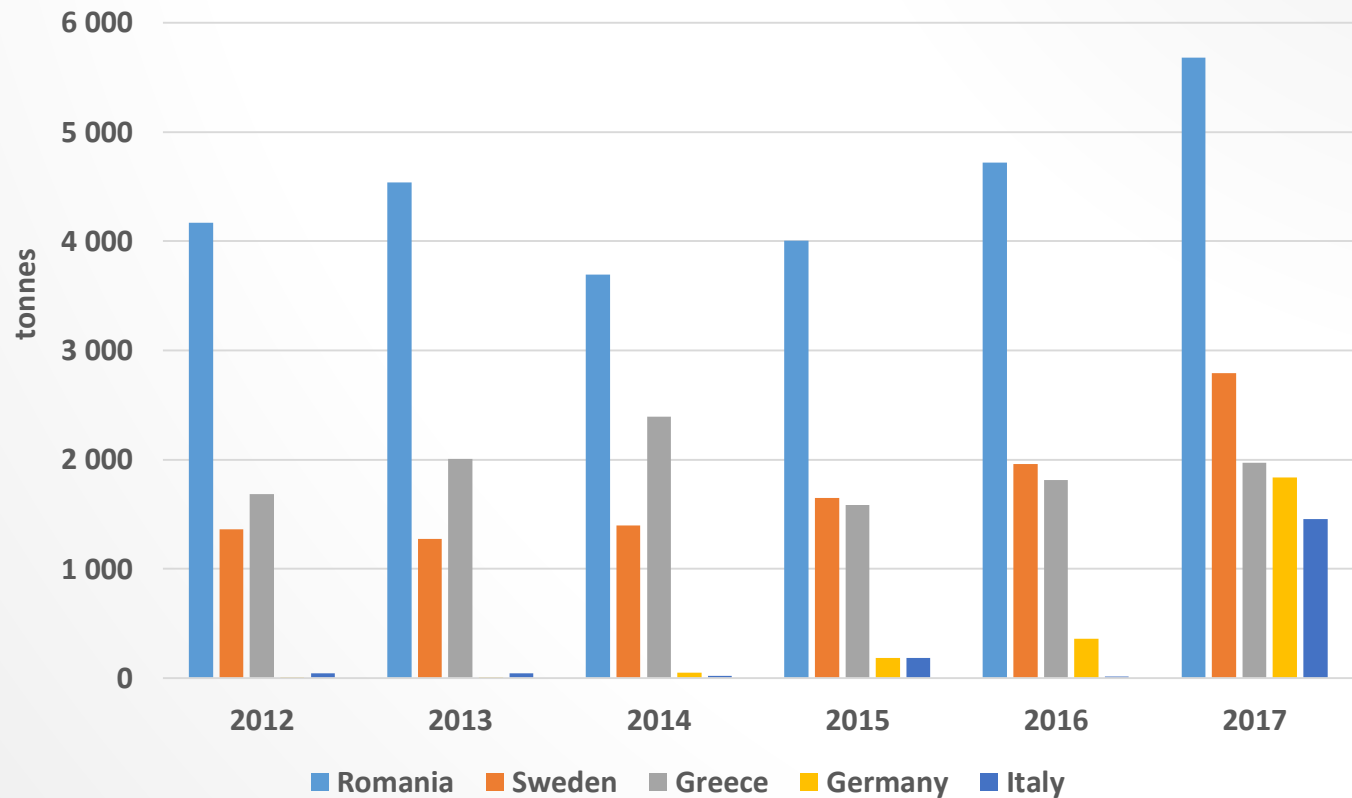
Source: EUMOFA, 2018

- 2017 Other molluscs**
 • 2 490 tonnes (+57% to 2012)
 
- 2017 Other shrimps**
 • 2 400 tonnes (+92% to 2012)
 
- 2017 Mussels**
 • 1 120 tonnes (>500% to 2012)
 
- 2017 Clams**
 • 1 450 tonnes (+180% to 2012)
 
- 2017 Carp**
 • 2 000 tonnes (>500% to 2012)
 
- 2017 Total**
 • 19 300 tonnes (+87% to 2012)
 

BULGARIA



Top-5 markets for Bulgarian export

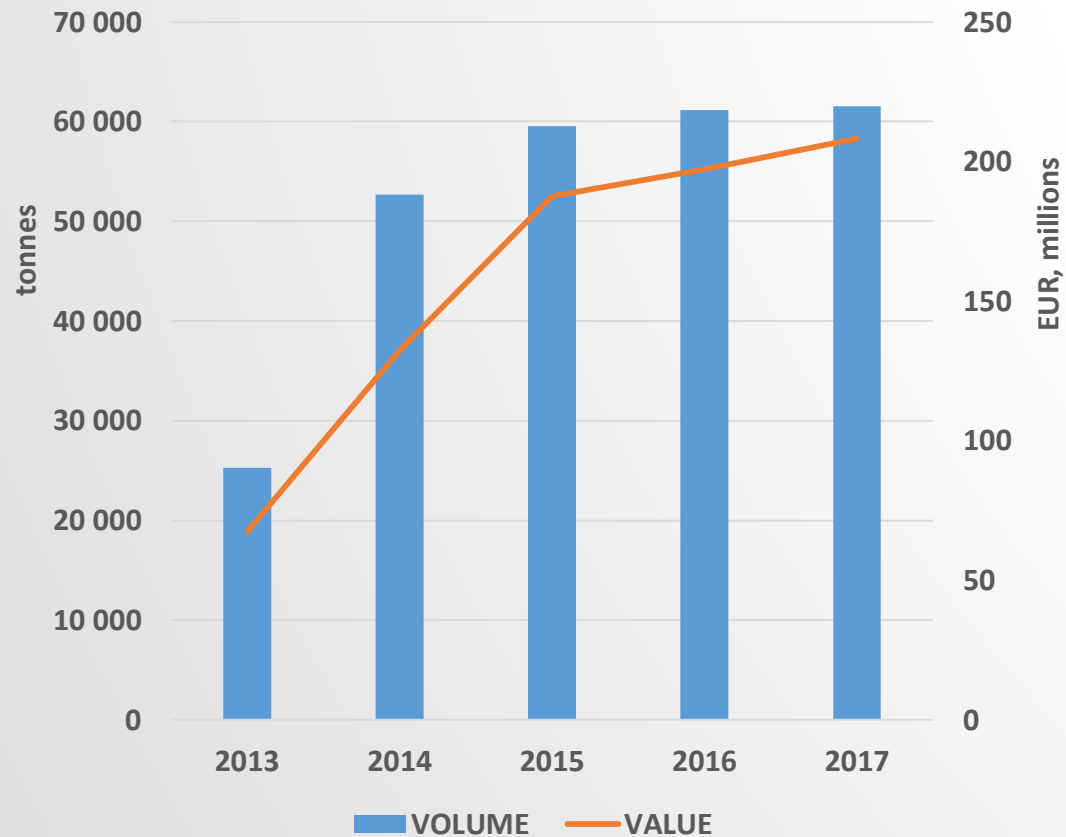


CROATIA



CROATIA

Croatian export of fish and seafood products



2017 Sardine

• 21 920 tonnes (+126% to 2012)



2017 Anchovy

• 8 050 tonnes (+61% to 2012)



2017 European seabass

• 4 270 tonnes (+350% to 2012)



2017 Gilthead seabream

• 3 536 tonnes (+265% to 2012)



2017 Bluefin tuna

• 2 850 tonnes (>500% to 2012)

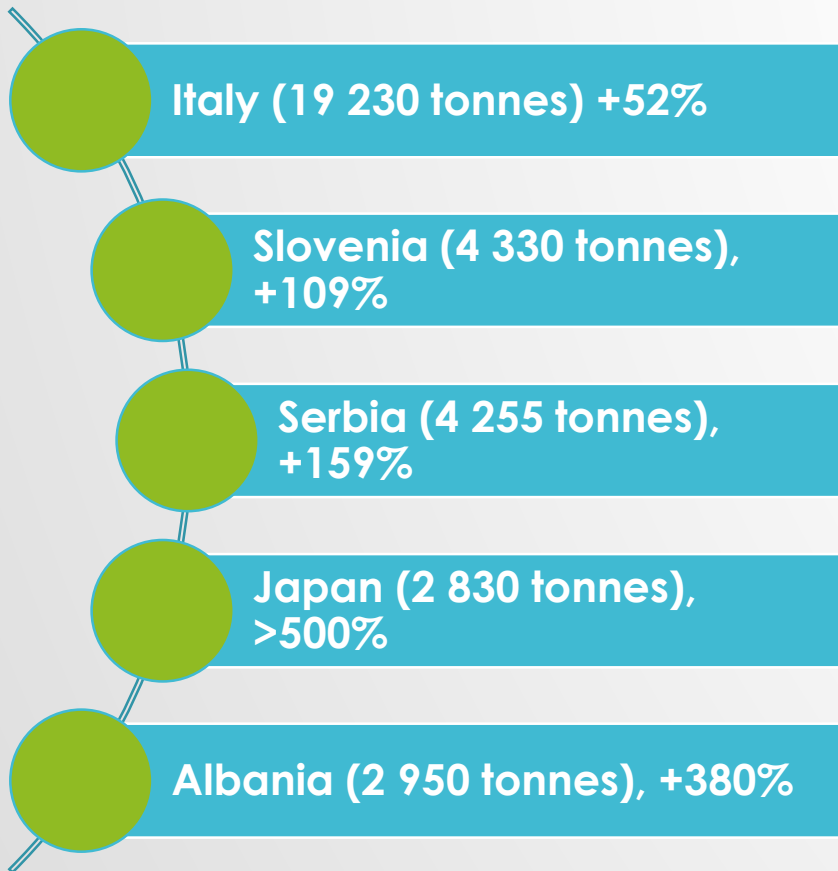


2017 Total

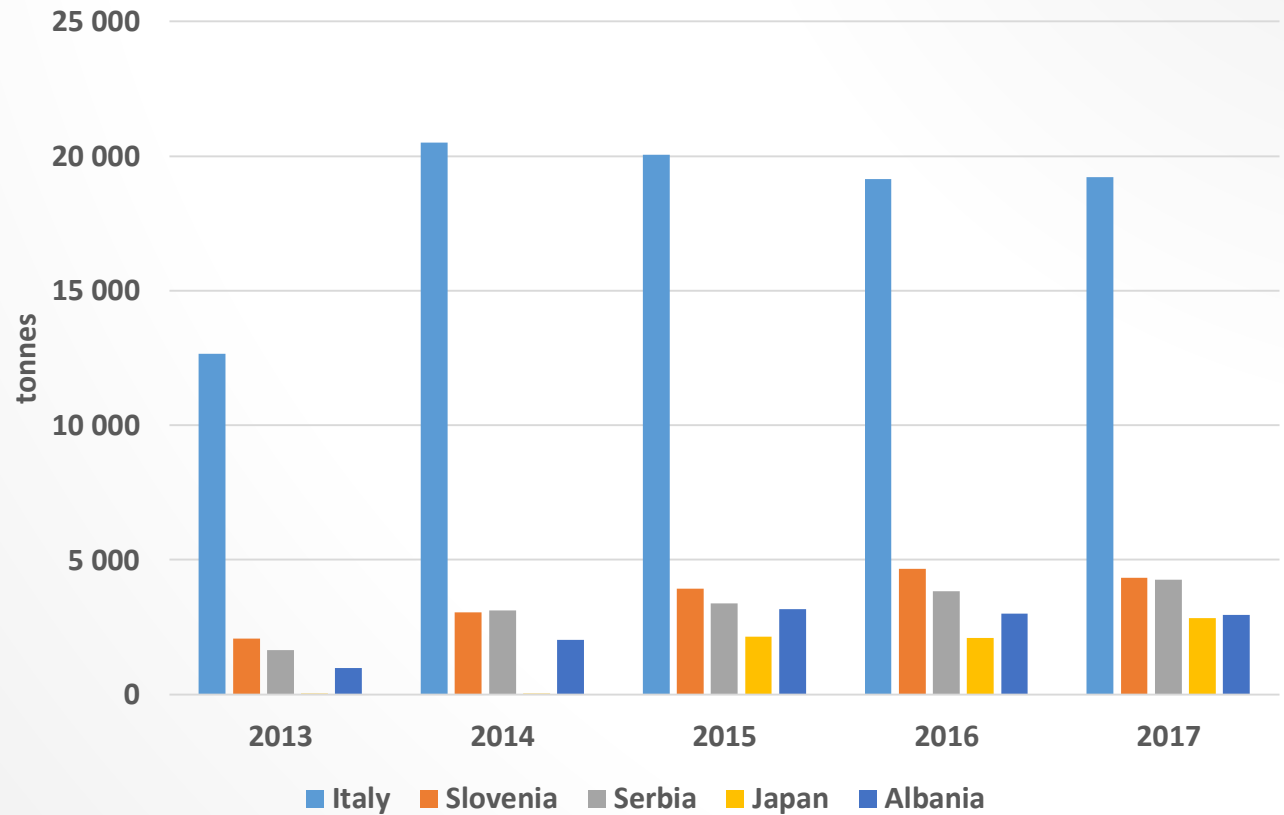
• 61 546 tonnes (+144% to 2012)



CROATIA



Top-5 markets for Croatian export

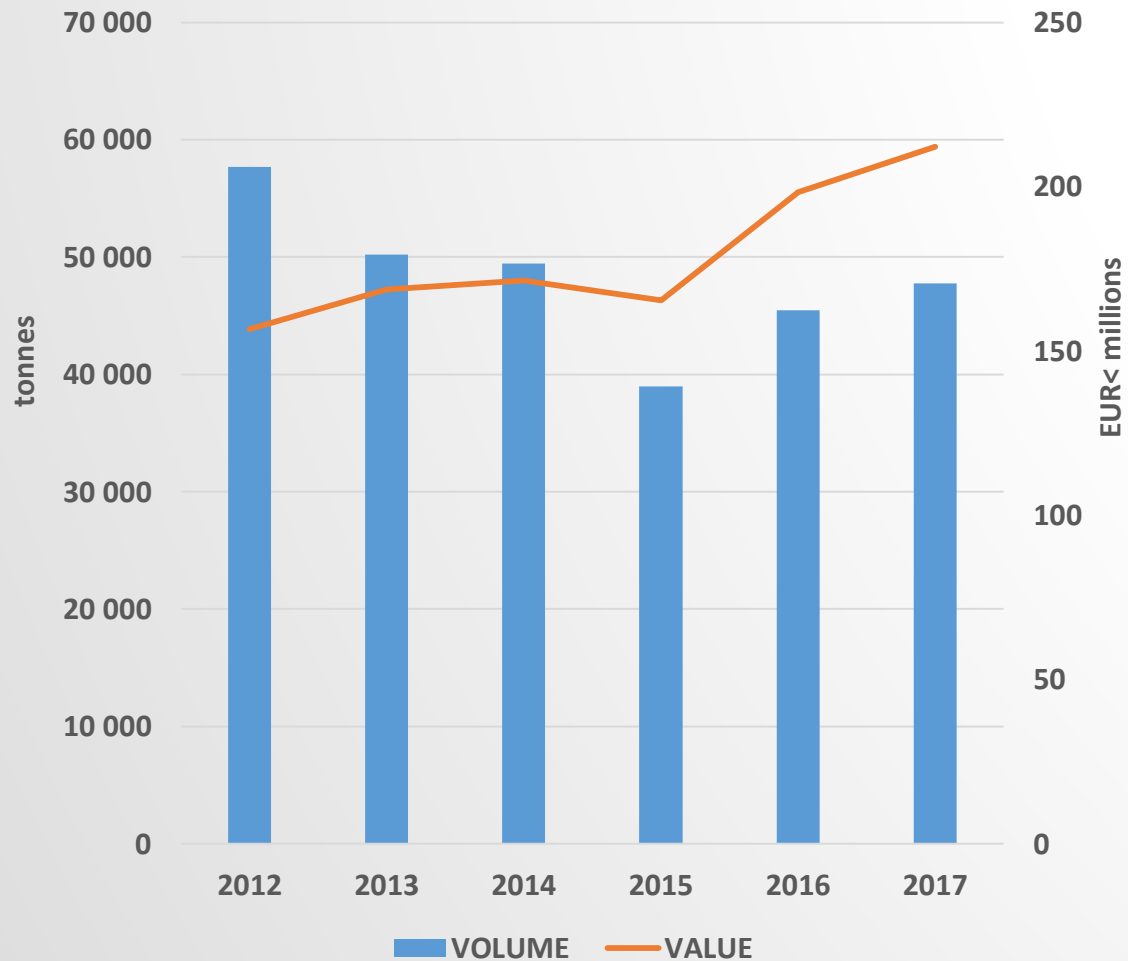


CZECH REPUBLIC



CZECH REPUBLIC

Czech export of fish and seafood



Source: EUMOFA, 2018

2017 Carp

• 10 633 tonnes (+31% to 2012)



2017 Other products

• 10 538 tonnes (-67% to 2012)



2017 Salmon

• 8 965 tonnes (+116% to 2012)



2017 Other freshwater species

• 1 070 tonnes (+2% to 2012)



2017 Freshwater catfish

• 226 tonnes (+51% to 2012)

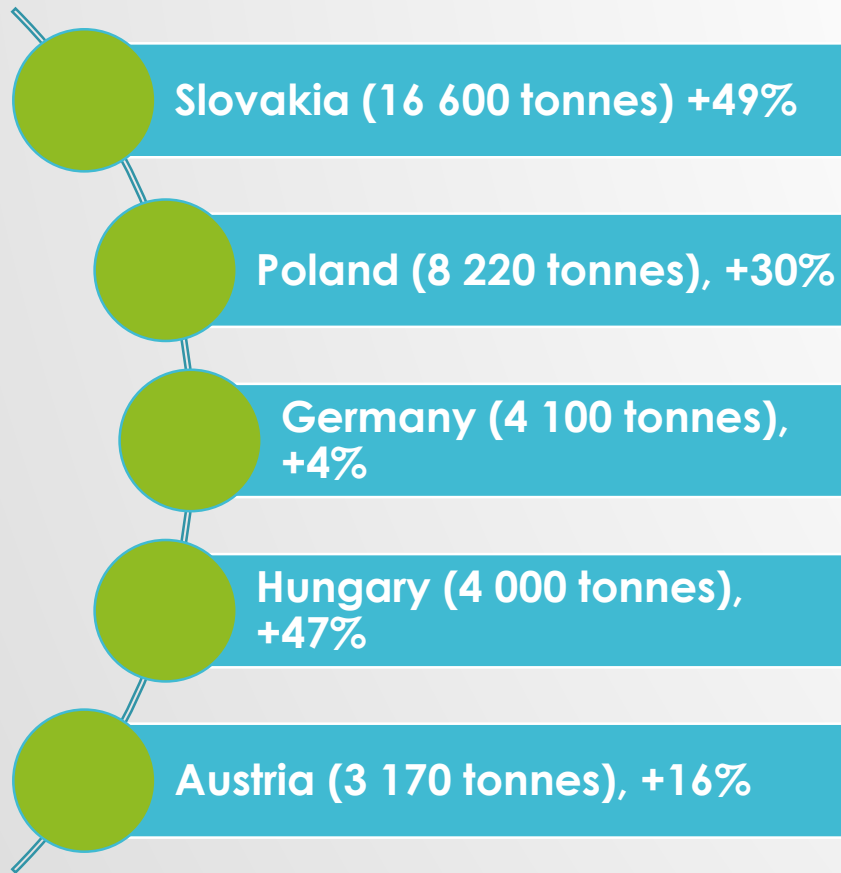


2017 Total

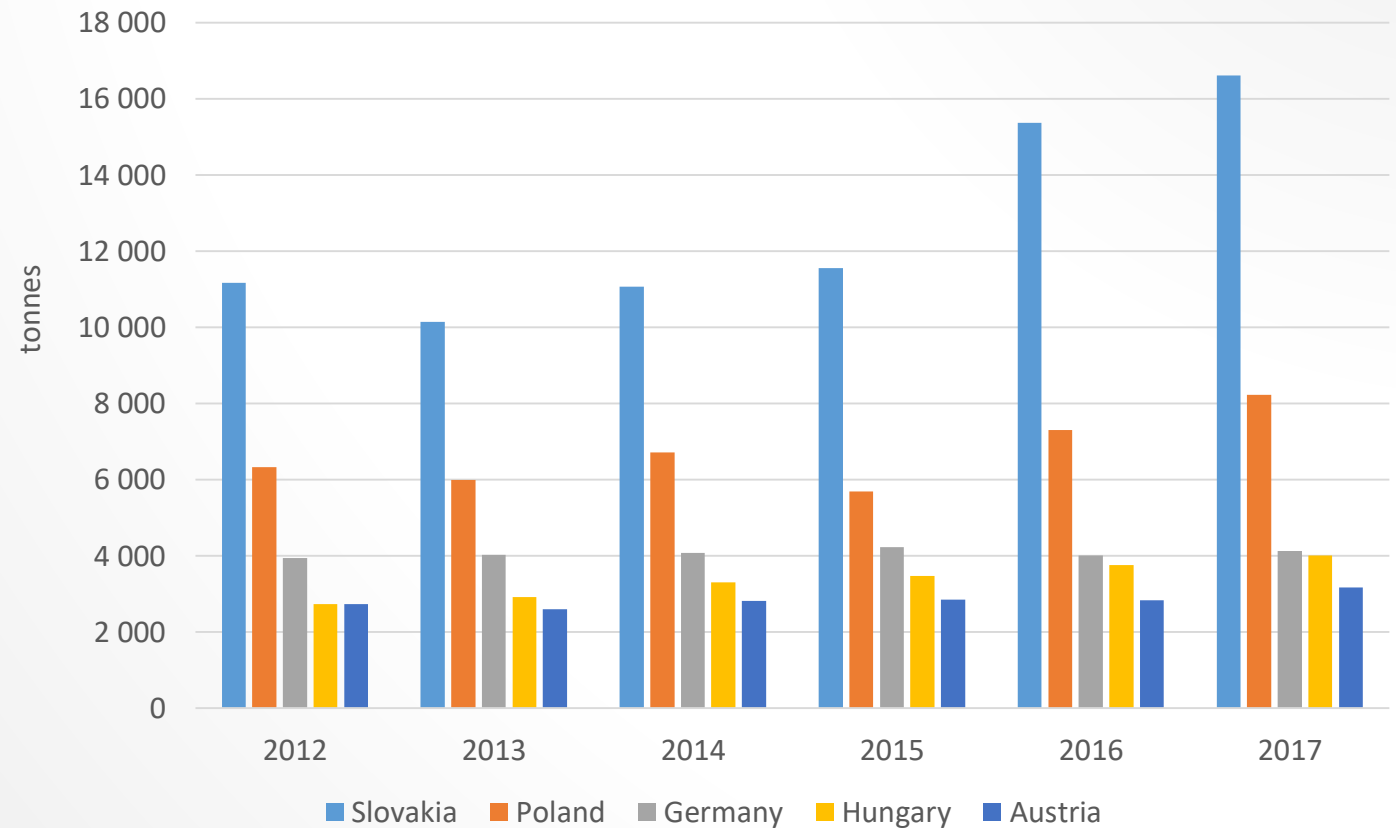
• 47 760 tonnes (-17% to 2012)



CZECH REPUBLIC



Top-5 markets for Czech export

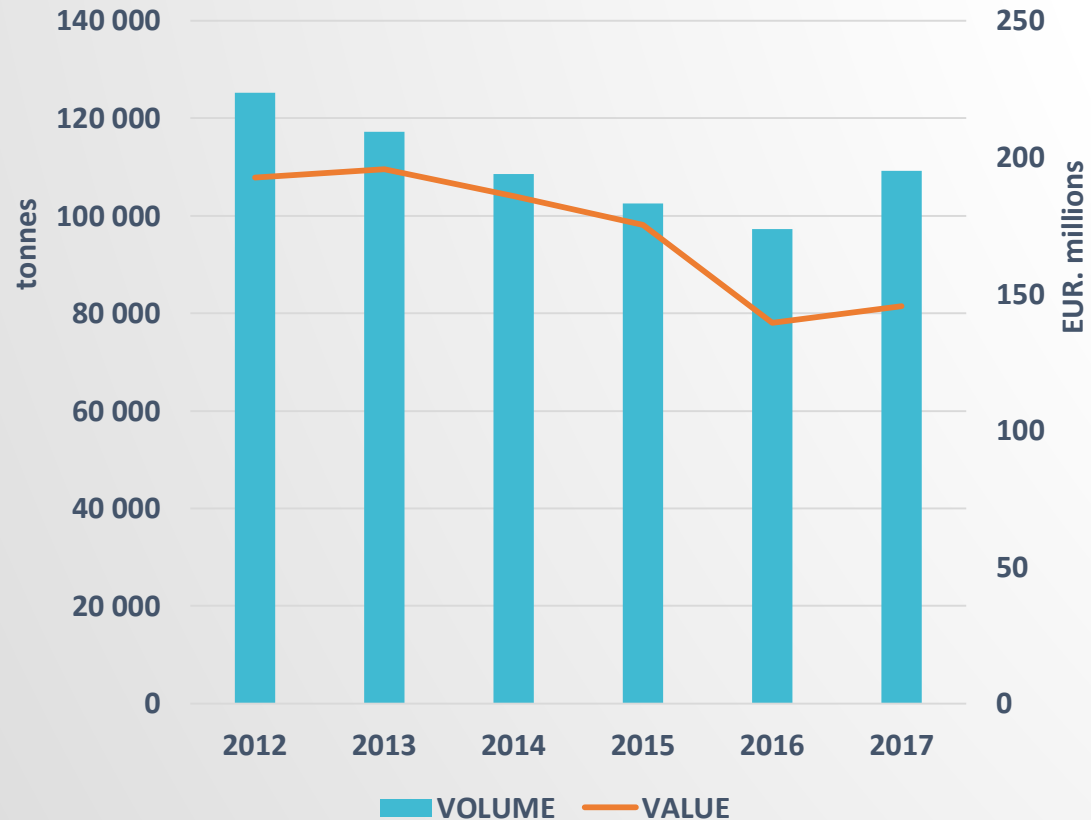


ESTONIA



ESTONIA

Estonian export of fish and seafood



Source: EUMOFA, 2018

2017 Sprat

• 32 029 tonnes (-26% to 2012)



2017 Herring

• 30 787 tonnes (+56% to 2012)



2017 Other small pelagics

• 7 087 tonnes (-41% to 2012)



2017 Salmon

• 5 510 tonnes (-64% to 2012)



2017 Other

• 33 841 tonnes (-4% to 2012)

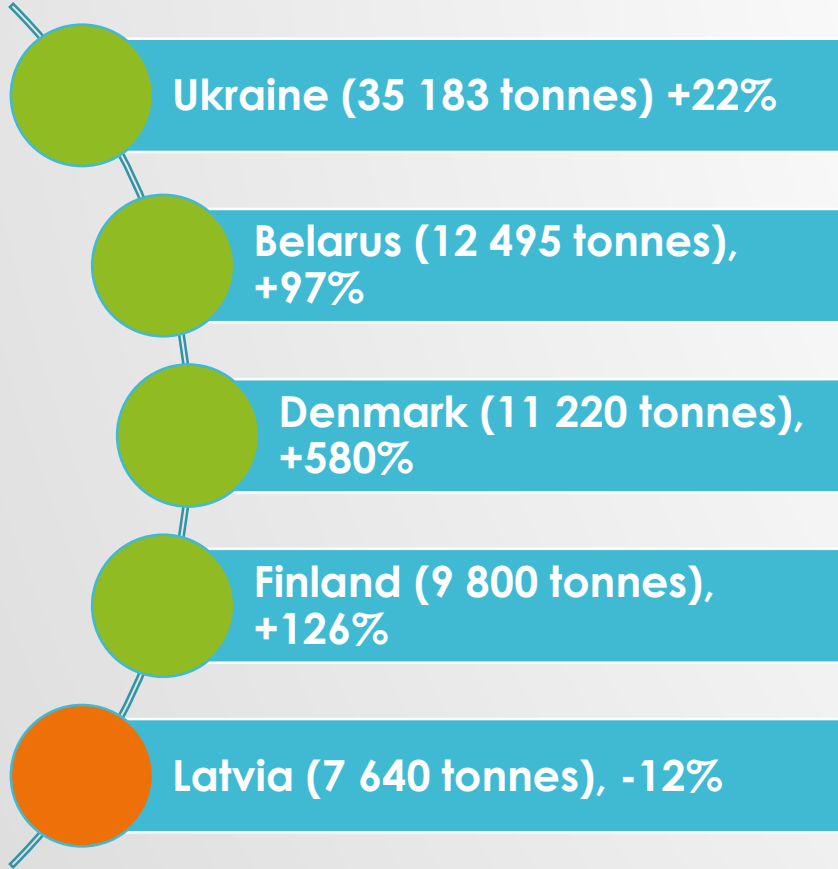


2017 Total

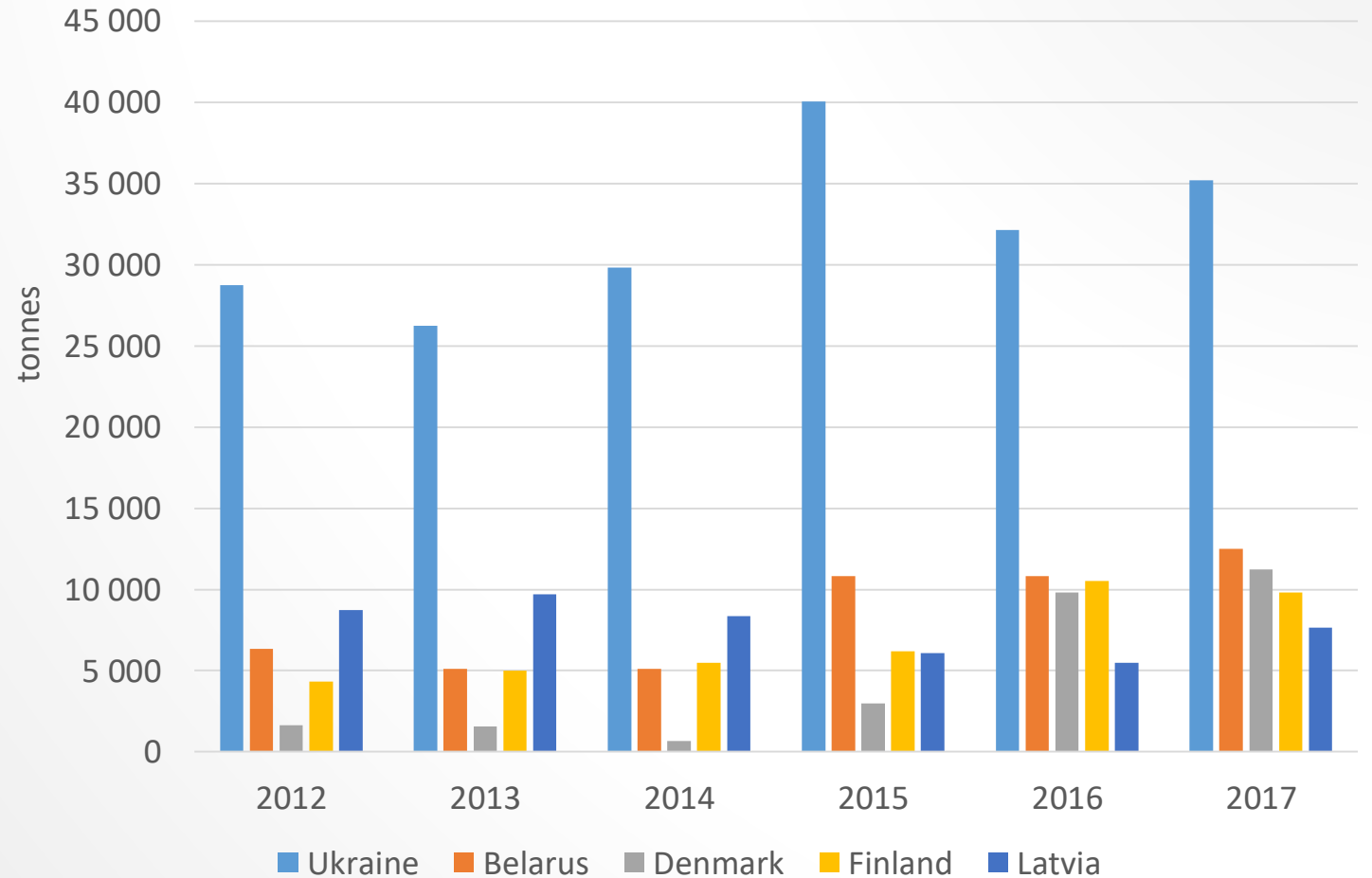
• 109 254 tonnes (-13% to 2012)



ESTONIA



Top-5 markets for Estonian export

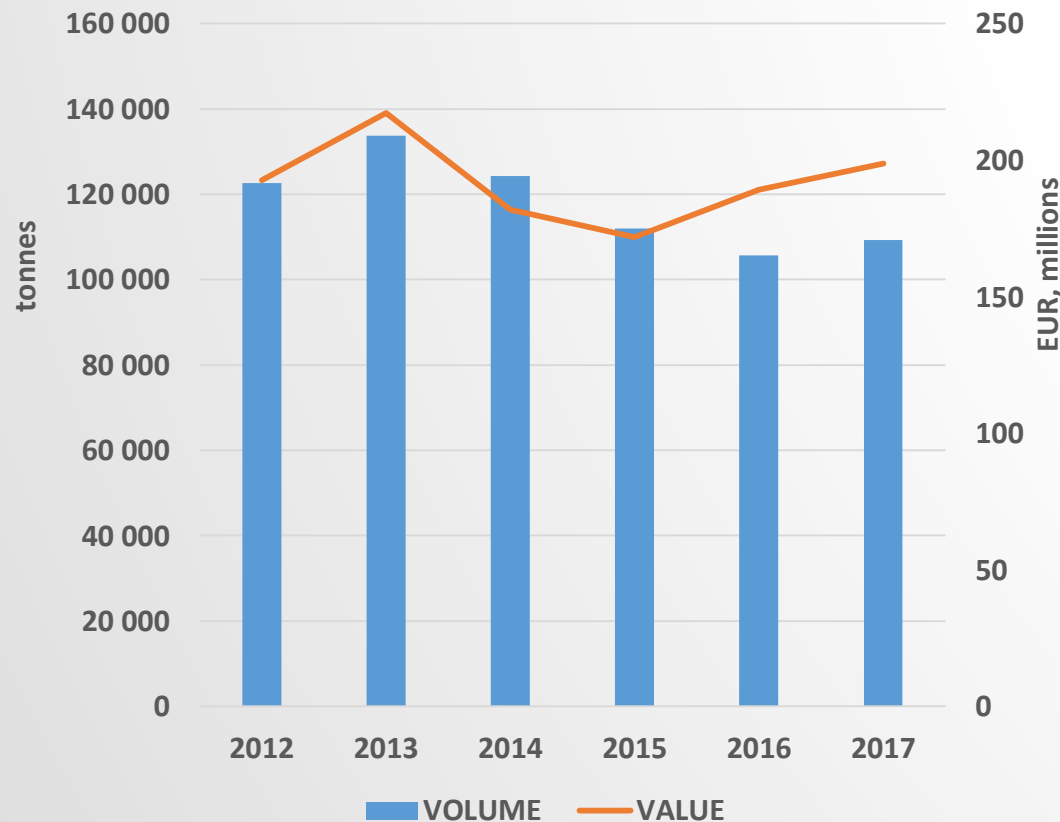


LATVIA



LATVIA

Latvian export of fish and seafood products



Source: EUMOFA, 2018

2017 Sprat

• 27 660 tonnes (+50% to 2012)



2017 Herring

• 20 140 tonnes (+92% to 2012)



2017 Other small pelagics

• 13 050 tonnes (-72% to 2012)



2017 Mackerel

• 7 340 tonnes (+64% to 2012)



2017 Salmon

• 5 140 tonnes (-53% to 2012)

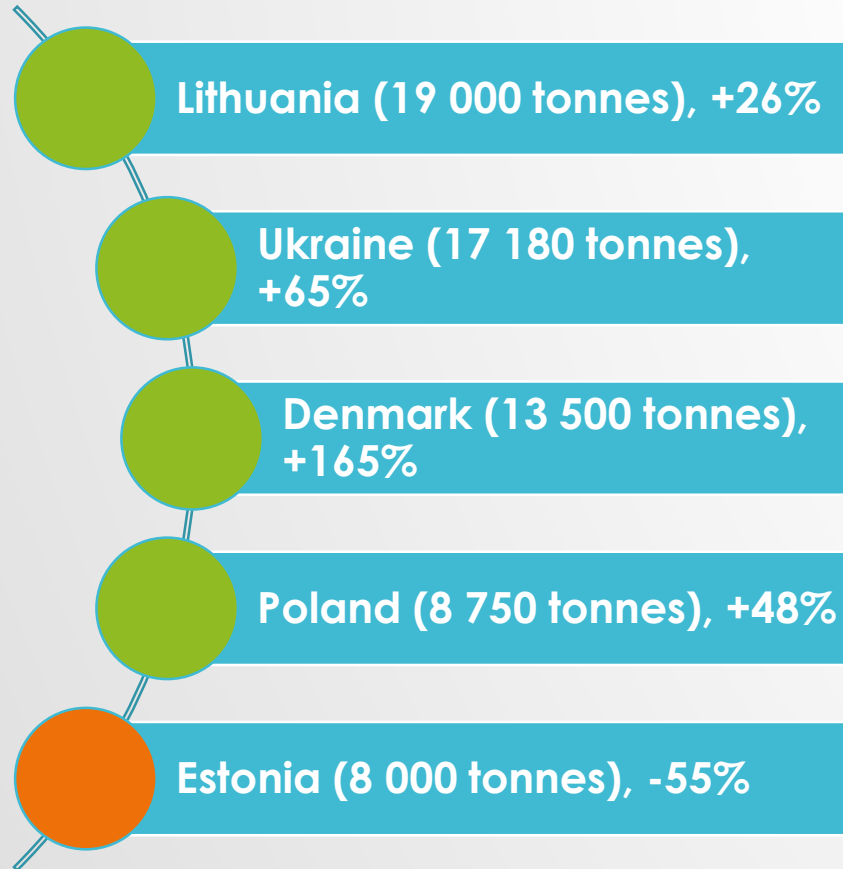


2017 Total

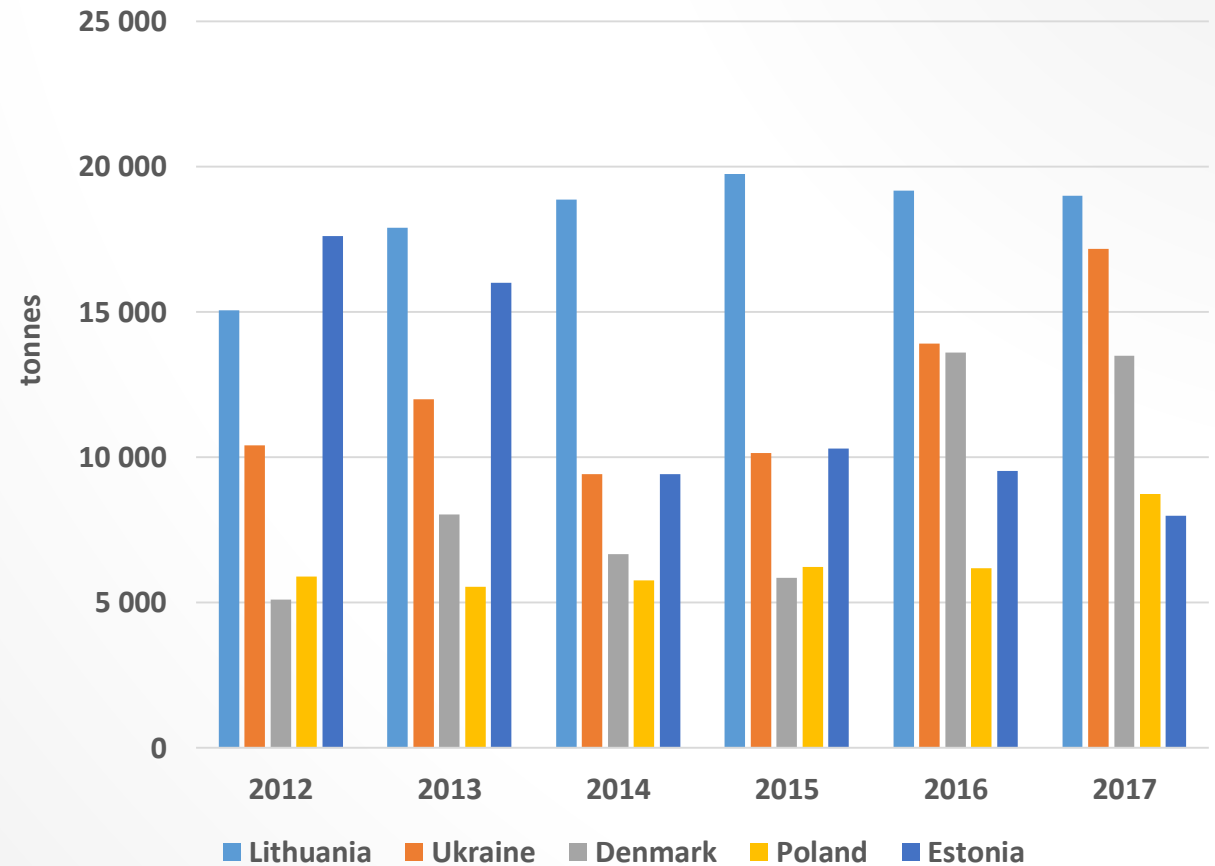
• 109 260 tonnes (-11% to 2012)



LATVIA



Top-5 markets for Latvian export

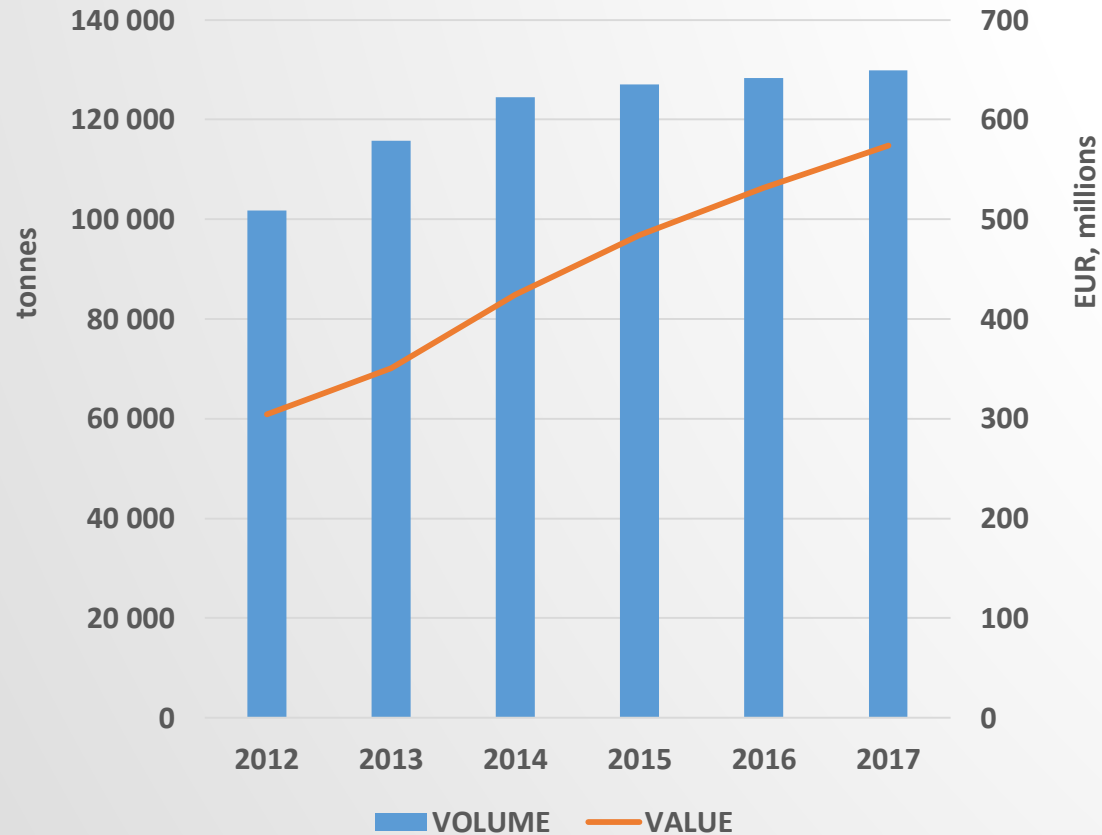


LITHUANIA



LITHUANIA

Lithuanian export of fish and seafood products



Source: EUMOFA, 2018

2017 Surimi

• 34 300 tonnes (+35% to 2012)



2017 Salmon

• 22 660 tonnes (+32% to 2012)



2017 Cod

• 15 700 tonnes (+123% to 2012)



2017 Herring

• 10 330 tonnes (-11% to 2012)



2017 Other species

• 46 770 tonnes (+15% to 2012)

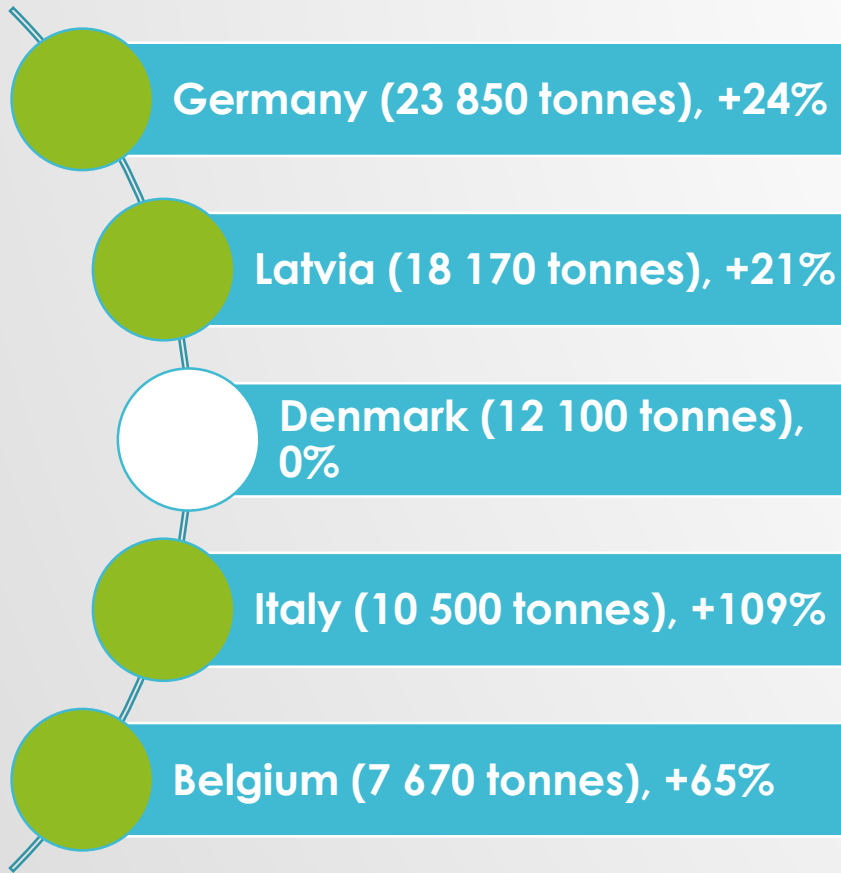


2017 Total

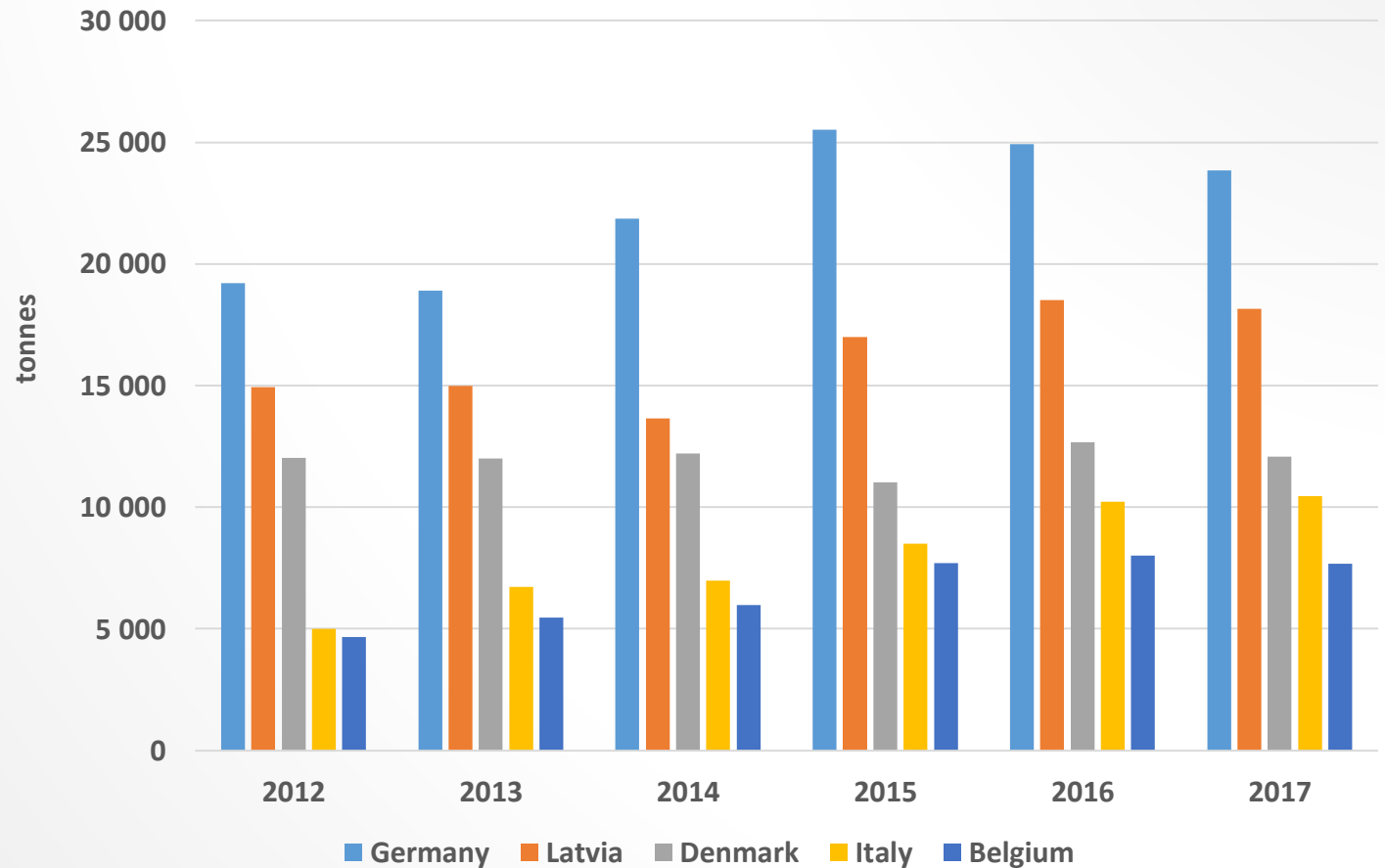
• 130 000 tonnes (+28% to 2012)



LITHUANIA



Top-5 markets for Lithuanian export

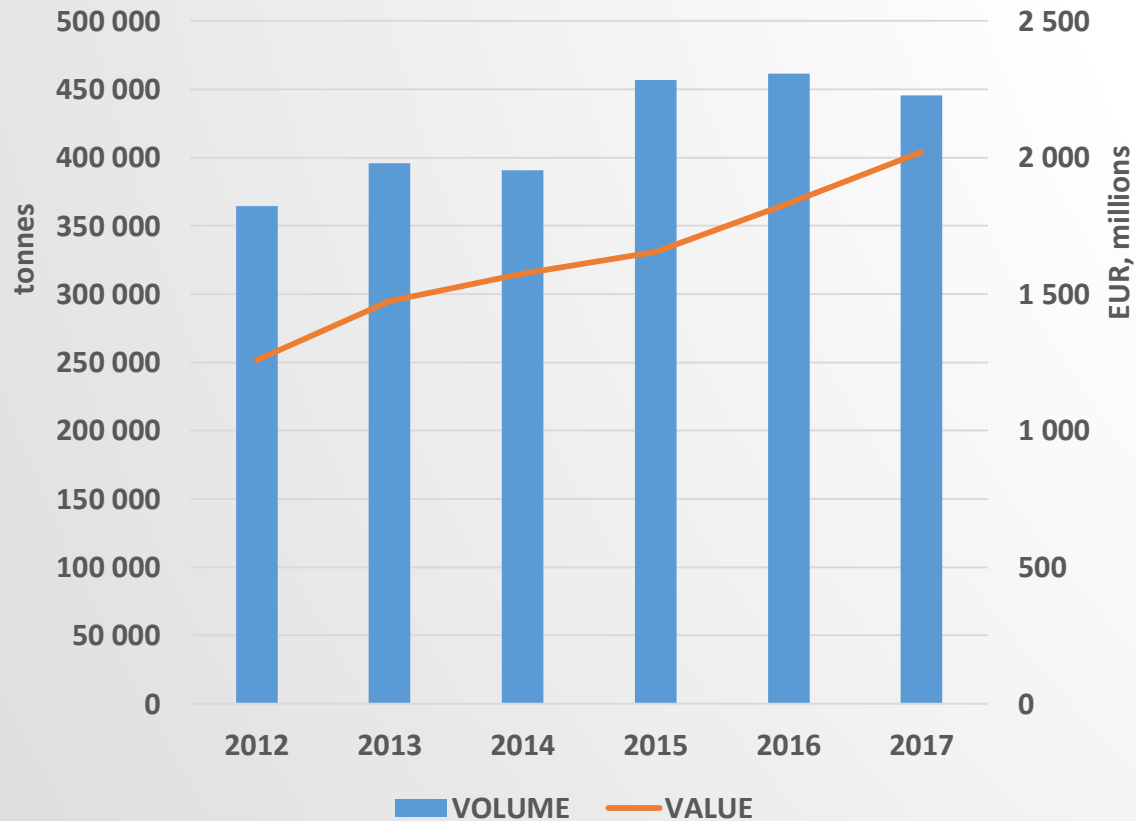


POLAND



POLAND

Polish export of fish and seafood products



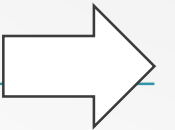
2017 Salmon

• 77 700 tonnes (+38% to 2012)



2017 Herring

• 55 900 tonnes (0% to 2012)



2017 Miscellaneous species

• 69 1200 tonnes (+10% to 2012)



2017 Cod

• 23 900 tonnes (+47% to 2012)



2017 Sprat

• 18 500 tonnes (-43% to 2012)

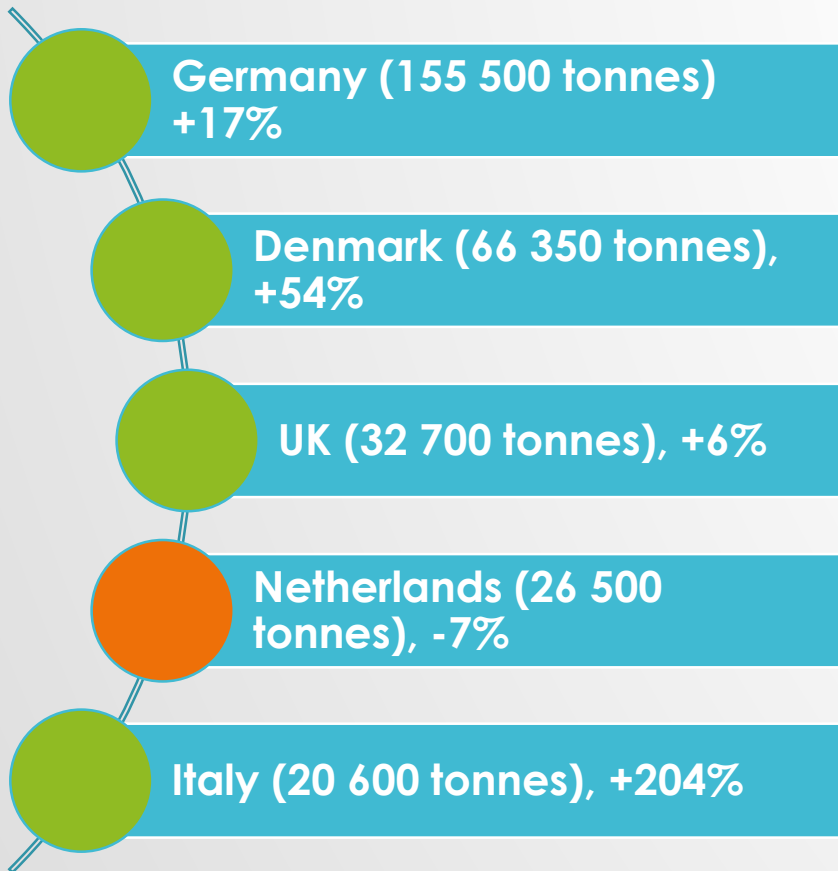


2017 Total

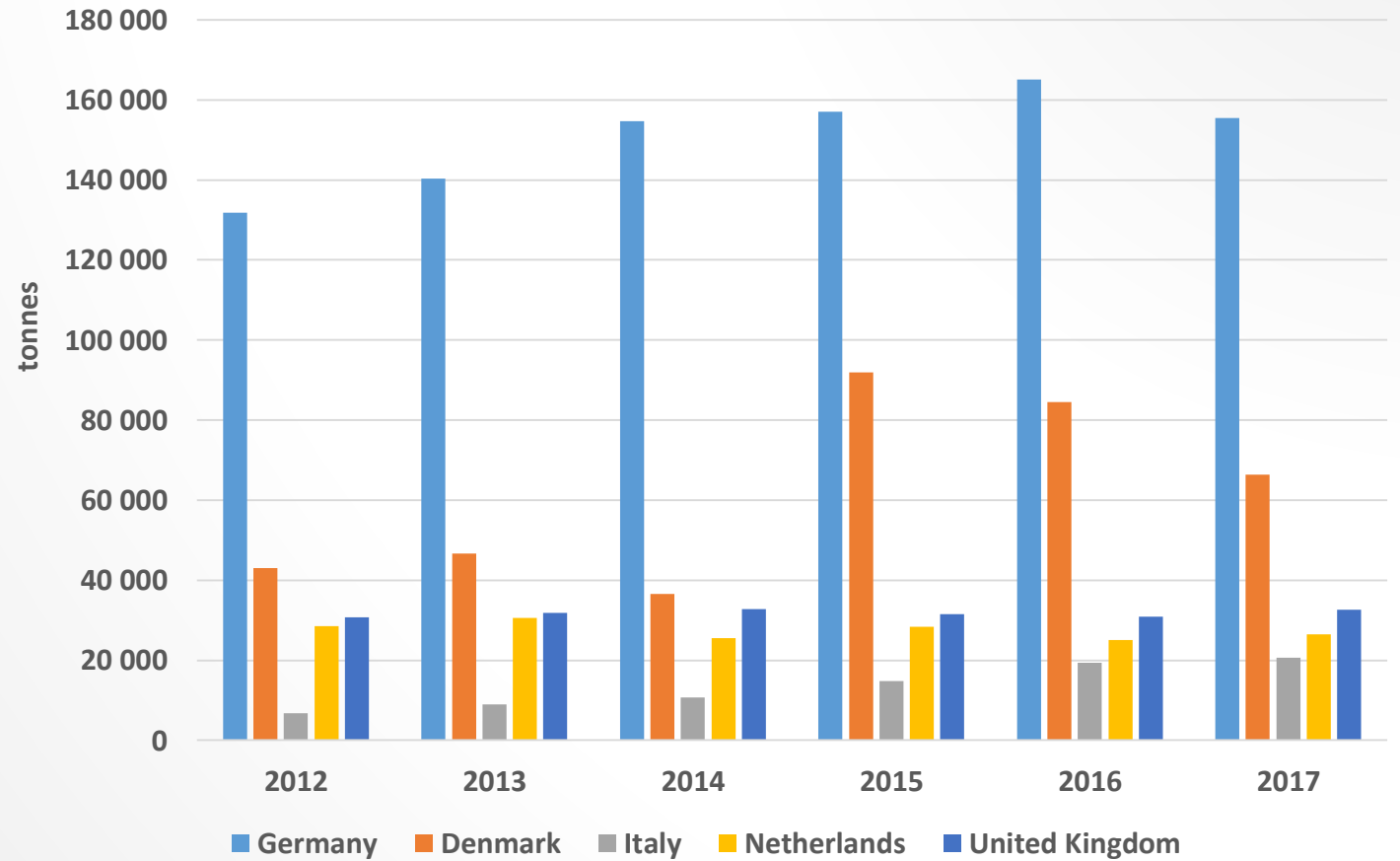
• 445 500 tonnes (+22% to 2012)



POLAND



Top-5 markets for Polish export

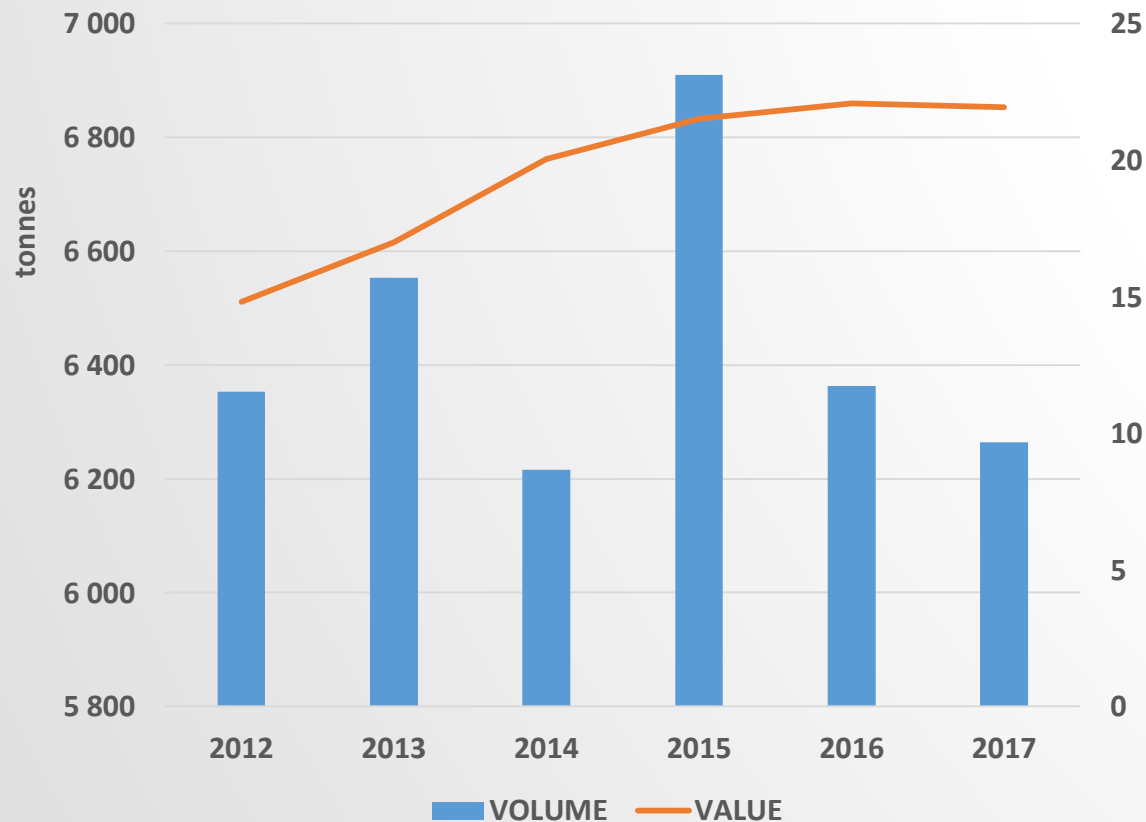


ROMANIA

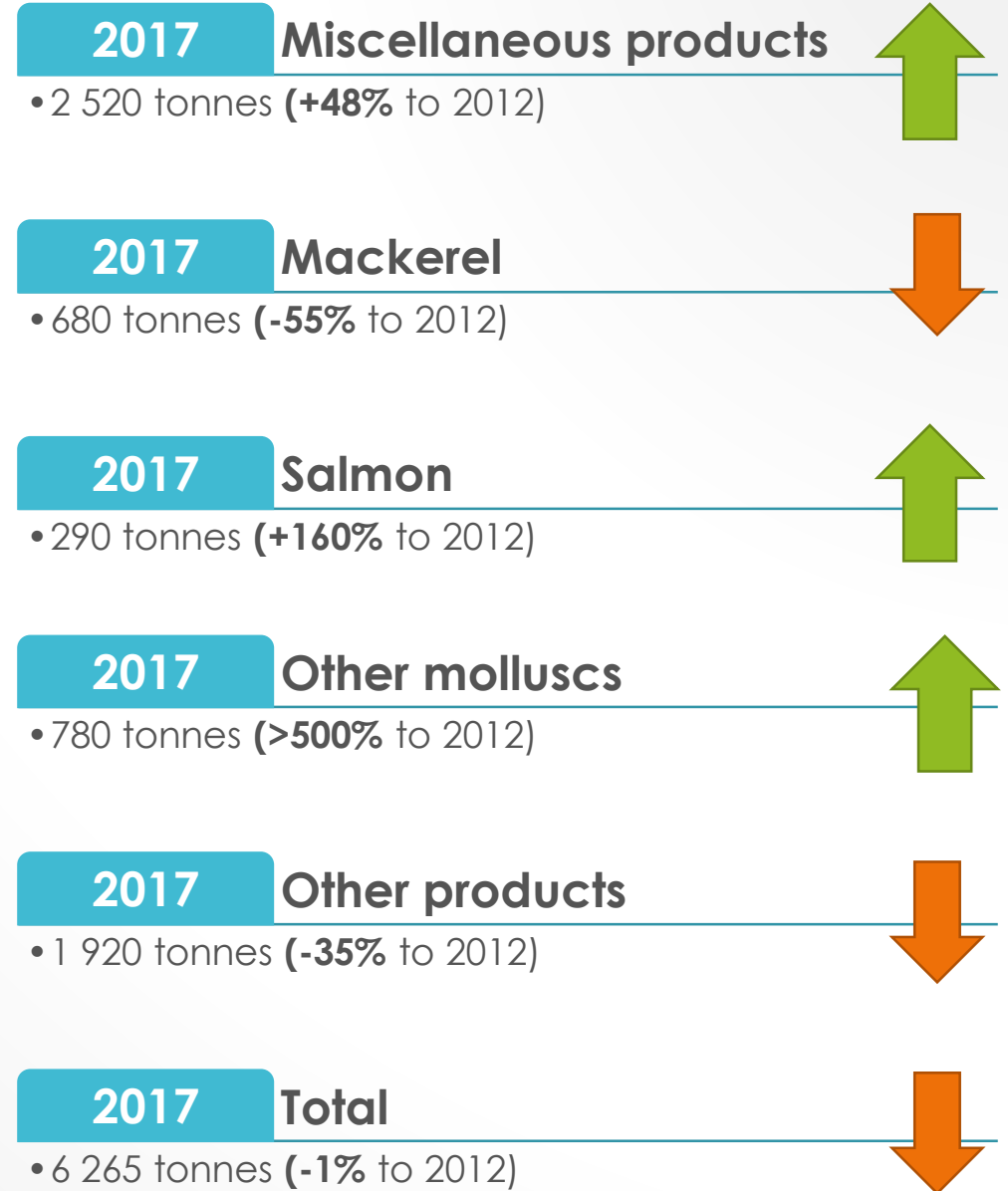


ROMANIA

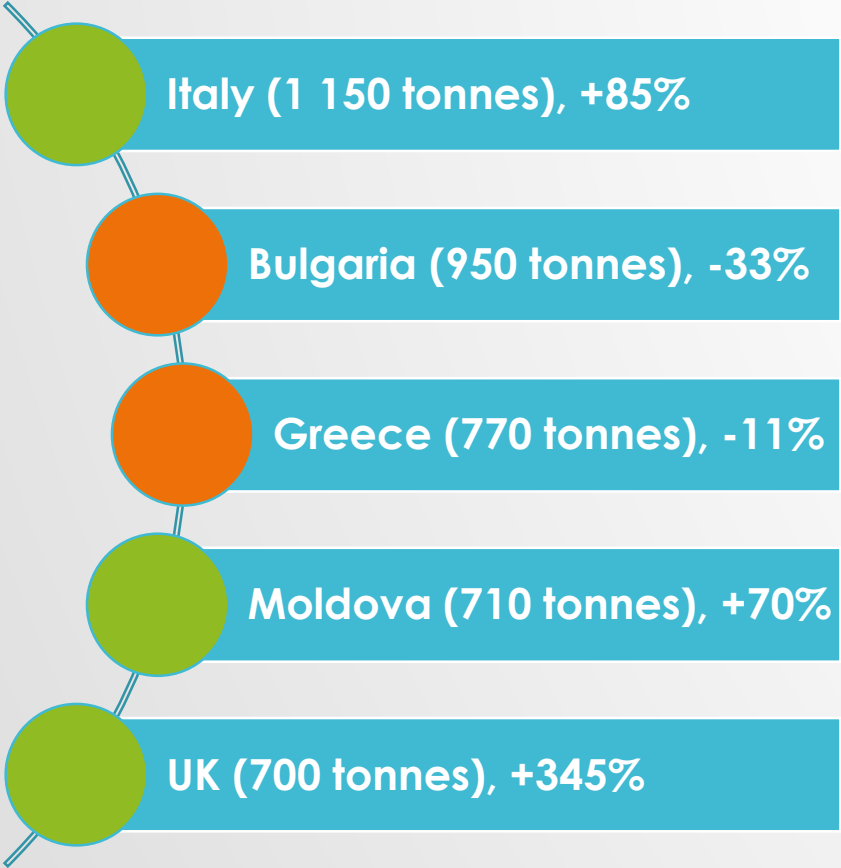
Romanian export of fish and seafood



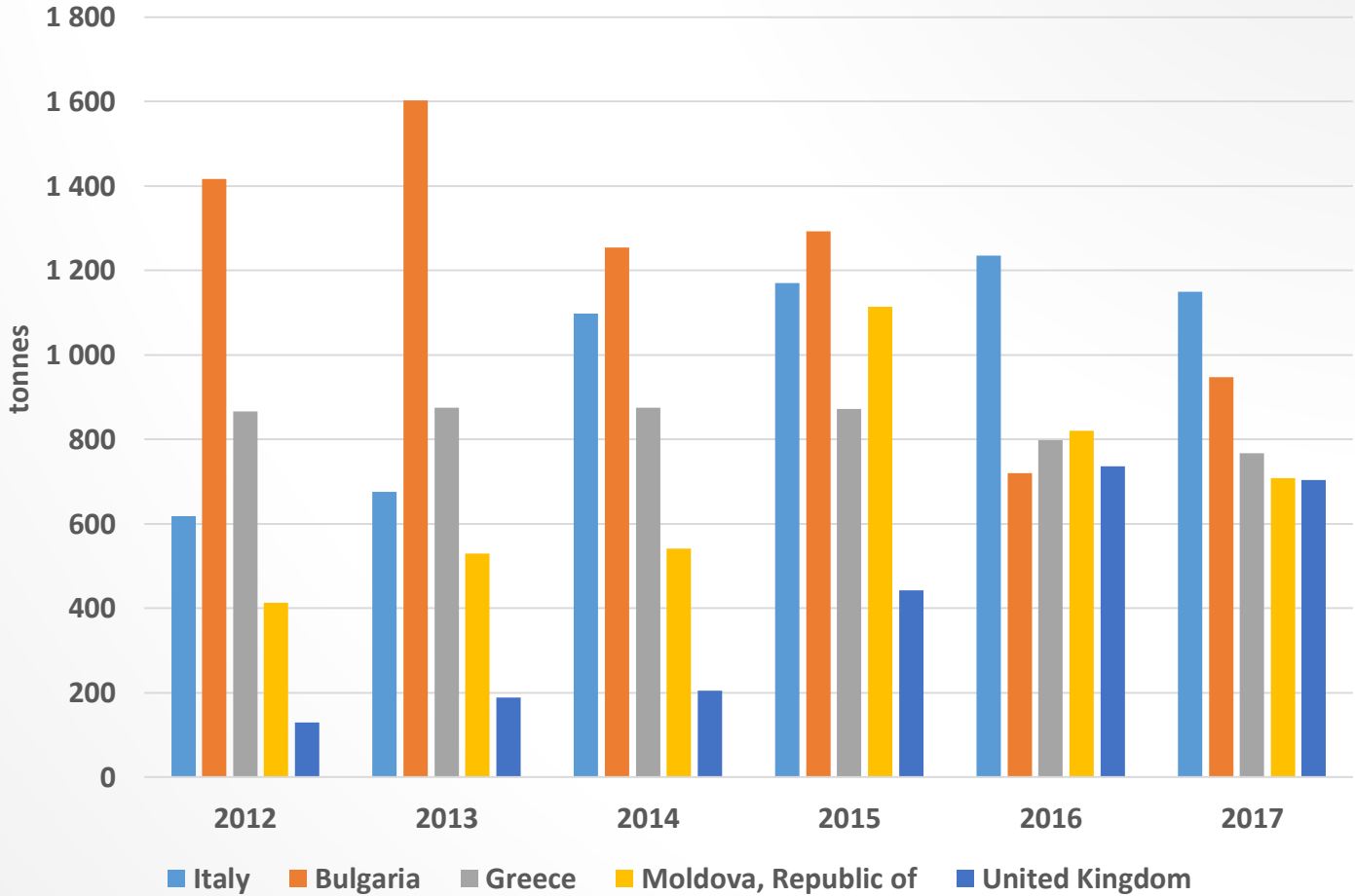
Source: EUMOFA, 2018



ROMANIA



Top-5 markets for Romanian export



Source: EUMOFA, 2018

SUMMARY

- **2017:** Exports of fish and seafood products from CEE-countries reached ca. 1 million tonnes (+20% over 2012) valued at EUR 3.6 billion (+44% over 2012);
- Exports of the group of **small pelagics** have stabilized, while **salmonids** and **groundfish** groups continue remarkable growth;
- **Herring** and **salmon** are keeping good export growth, as well as **cod**, **sardines** and **surimi**, whereas exports of **sprat** declined;
- Exports of **prepared** and **preserved** products (over 1/3 of the total export volume) became stable, while exports of all other product forms were growing, especially **fresh** products.

SUMMARY

- **Poland** makes up nearly half of the export from CEE countries, growth of 22% (salmon, herring, cod and sprat),
- **Germany**, one of the top-markets for CEE countries, had continuous growth for all relevant exporting countries.
- **Italy** and **Denmark** were the top-markets with multiple increases in volume for many CEE-exporting countries,
- **Netherlands** followed a declining trend for volumes exported from CEE countries, while the **UK** market was more stable.

Thank you for your attention!