Required Report - public distribution

Date: 11/23/2001

GAIN Report #E21144

European Union

Fishery Products

Annual

2001

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Report Highlights:
The report outlines the current situation in the EU fishery sector. In the spring of 2001, the European Commission has published its "Green Paper", an options paper in preparation of a new Common Fisheries Policy to enter into force on January 1, 2003. The paper addresses the problem issues arising from the current policy, among others dwindling EU fishing stocks and a large fleet overcapacity.

Includes PSD changes: No
Includes Trade Matrix: Yes
Annual Report
Brussels USEU [BE2], E2

EXECUTIVE SUMMARY

2001 has been the year of debate on the reform of the Common Fisheries Policy (CFP). All parties of the EU fisheries sector have formulated their views on how the future CFP should address the problems arising from the current policy. Discussion and decision-making will continue in 2002, in order to have a new policy in place when the current CFP expires on December 31, 2002.

Factual data have been effective in revealing the problem issues such as dwindling fish stocks and EU fleet overcapacity. Scientific advice on the management of fish resources on a sustainable basis was the basis for the drastic cuts in the Total Allowable Catch Quotas set for 2001. In addition, owing to the alarming state of the stocks of certain fish species (particularly cod and hake), the EU has taken a number of emergency measures in 2001.

As there are lower levels of fish to be caught, and fish stocks have been decreasing, the decrease in EU fish catch data is not surprising. In 1999, EU fish catch amounted to 6.335 MMT, the lowest output of the nineties.

2001 has also been the year of the renewal or extension of several bilateral fisheries agreements between the EU and third countries. In some cases, existing agreements have been adapted with a view to allowing those countries to develop their own fisheries sectors. Partnership agreements are generally seen as key instruments in future external fisheries policy.

SECTION I: SITUATION AND OUTLOOK

Production - General

EU fish catch during 1999 equaled 6.335 MMT, a 6-percent decrease compared to the previous year. This is the lowest output of the nineties, with EU fish catches varying between 6.7 MMT and 7.7 MMT over the period 1991-1998. Both catch limits for a growing number of species and, in some cases, alarming decreases in fish stocks, have resulted in lower levels of fish to be caught. EU catch data for 2000 and 2001 are expected to reflect the continuation of this development.

Among EU member states, Denmark catches the most fish (22 percent of EU fish catch in 1999); Spain and the U.K. rank second and third, respectively. All EU member states except France and Greece saw their fish catches decrease in 1999. The largest reductions were recorded in the U.K., Ireland, Denmark, Sweden, and Germany. About 74 percent of the EU fish catch originates from the Northeast Atlantic. The 1999 decrease in fish catches occured primarily in the Northeast Atlantic and the Eastern Central region. On the other hand, a 70-percent increase in catches by EU fishermen took place in the West region of the Indian Ocean.

Atlantic herring and sandeel represent the largest single fish species caught by EU fishermen. In 1999 they accounted for 11 percent and 9 percent of total EU fish catch. Atlantic horse mackerel, European pilchard, and sandeel suffered most from the decrease in EU fish catches in 1999. For more details on catch by EU member state, by fishing region, or by fish specie, see Tables 1, 2 and 3, respectively.

In 1999, total EU aquaculture production amounted to 1.374 MMT, of which 0.858 MMT of mollusc farming and 0.512 MMT of fish farming. Although representing only 3 percent of world aquaculture production, EU aquaculture has tripled over the last thirty years.

Production from fish farming in the EU has rapidly increased over the last 15 years, encouraged by the availability of sophisticated technology. In order of importance, the U.K., Italy, France, Greece, Spain, Denmark, and Germany are most involved in fish farming in the EU. Rainbow trout (228,000 MT) and atlantic salmon (146,000MT) accounted for 44 percent and 29 percent, respectively, of EU production of farmed fish. Gilthead seabream (47,000 MT) and seabass (36,000 MT) rank third and fourth.

Contrary to the growth in fish farming, mollusc farming in the EU has remained relatively stable over the years. In 1999, EU production slightly decreased to 858,000 MT (compared to 861,000 MT in 1998). Spain, France, and Italy are the three biggest EU member states in terms of mollusc farming. EU production of mussels, both blue mussels and Mediterranean mussels, amounted to 637,000 MT, while oyster farming (more particularly Pacific cupped oyster) generated 143,000 MT. In addition to mussels and oysters, carpet shells make up the third group of molluscan species of importance in EU aquaculture.

In 2000, there were 95,967 fishing vessels registered in the EU, equaling 7,656,886 kW of engine power and 2,028,554 tonnes (either gross tonnes or gross registered tonnes). Currently, Greece has the largest number of fishing boats, but in terms of engine power and tonnage, Italy and Spain, respectively, are the leading fishing member states. The EU fishing fleet has a median age of 21.6 years, varying between 15.2 years (Belgium) and 27.1 years (Spain).

Over the period 1998-2000, the number of EU vessels has decreased by 4 percent, the total tonnage increased by 5 percent, and the total power decreased by 2 percent. The European Commission has stated that in 2001 there is, however, still a EU fleet overcapacity of about 40 percent. Cutting this overcapacity is one of the major goals in defining the new Common Fisheries Policy, scheduled to apply as of January 2003. See Policy.

Table 1: Nominal fish catches by the EU-15, 1997-1999; in 1,000 MT live weight

	1997	1998	1999
Belgium	31	31	29
Denmark	1,827	1,557	1,405
Germany	260	267	239
Greece	170	128	137
Spain	1,165	1,231	1,182
Finland	180	172	161
France	649	616	650
Ireland	328	361	322
Italy	346	320	296

Netherlands	452	537	515
Austria	0	0	0
Portugal	224	225	210
Sweden	357	411	352
U.K.	894	920	838
Total EU-15	6,883	6,774	6,335

Source: EUROSTAT

Table 2: Distribution of EU catches by fishing zones, 1999, in 1,000 MT live weight

	1999
Northwest Atlantic	55
Northeast Atlantic	4,713
Eastern Central	480
Mediterranean	548
Southwest Atlantic	105
Southeast Atlantic	14
Indian Ocean, West	237
Inland waters	109
Total	6,335

Source: EUROSTAT

Table 3: Catches of principal species by the EU, 1999, in 1,000 MT live weight

	1999
Common sole	38
European plaice	100
Cod	218
Norway pout	57
Haddock	87
Blue whiting	323

Whiting	58
European hake	62
Ling	28
Saithe	59
Sandeel	567
Atlantic redfish	43
Angler	34
Atlantic horse mackerel	267
Atlantic herring	683
European pilchard	312
European anchovy	115
European sprat	435
Skipjack tuna	228
Yellowfin tuna	148
Albacore	34
Swordfish	24
Atlantic mackerel	348
Norway lobster	60
Edible crab	37
Common shrimps	37
Blue mussel	106
Mediterranean mussel	54
Striped venus	41
sub-total	4,603
all others	1,732
TOTAL CATCHES	6,335

Source: EUROSTAT

Policy - Production Policy

The European Council is required to formulate annually the necessary measures for ensuring the rational and responsible management of fish resources on a sustainable basis. The EU's conservation policy is to provide maximum protection for stocks based upon scientific and economic information provided by the EU's Scientific, Technical and Economic Committee for Fisheries (STECF) and by the International Council for the Explorations of the SEA (ICES).

The concept of "total allowable catch" (TAC) has been used by the EU since 1983. Based upon advice each year from the ICES and STECF, the European Commission proposes TACs which are distributed by fishing zone, member state and species. The final decision on TACs for the following year is taken by the Council of Ministers for Fisheries each year in December and published in the EU's Official Journal. Over the years, a larger percent of the EU fish catches has been covered by TACs.

As soon as the catch of a certain fish specie, for which a TAC was defined, has exhausted the quota allocated to a certain EU member state or to a third country, fishing for that variety in that area is prohibited for the remainder of the year for the country in question.

Council Regulation 2848/2000 of December 15, 2000 (Official Journal L334 of December 30, 2000) fixes for 2001 the fishing opportunities and associated conditions for certain fish stocks and groups of fish stocks, applicable in Community waters and, for Community vessels, in waters where limitations in catch are required. Annex I of this regulation consists of 7 parts corresponding to the major fishing areas as follows: Annex I A: Baltic Sea; Annex I B: North Sea, Skagerrak and Kattegat; Annex I C: North-east Atlantic and Greenland; Annex I D: Western Community waters; Annex I E: North-West Atlantic; Annex I F: Highly migratory fish (all areas); Annex I G: Antarctic.

Already in the fall of 2000, it became clear that there was an urgent need for a plan to rebuild depleting white fish stocks (mainly cod, but also haddock and whiting) in the North Sea and the West of Scotland. Scientists estimated that cod stocks in particular were around two and a half times below what they consider a reasonable biological level. More severely than in previous years, substantial cuts in TACs were applied for the year 2001. The amount of cod allowed to be caught by EU fishermen went down by 44 percent, from 73,610 MT in 2000 to 41,000 MT in 2001. Given the poor state of the cod stocks, however, EU fishermen have, since 1995, not taken up the available quota. In 2000, actual catch of cod amounted to only 60 percent of the quota.

Given that cod is a by-catch in the fishing for sole and plaice, 2001 quotas for these fish species were cut by 20 percent and 16 percent, respectively. The EU Council of Fisheries ministers also agreed on a 41-percent reduction in permitted North Sea catches of hake, and a decrease by about a third in 2001 TACs for whiting.

In addition to quota cuts, the European Commission has adopted emergency measures in 2001 to ensure that certain fish stocks recover. In order to protect North Sea cod, it was prohibited to conduct any fishing activity within a large part of the North Sea during the period February 14-April 30, 2001. At that time, further technical and control measures were announced in the frame of a long-term cod plan. In June 2001, the EU Commission proposed details of a multi-annual (4 to 6 years) scheme, involving a 40-50 percent reduction in fishing effort for cod. The adoption of the scheme requires approval of EU fisheries ministers and consultation with the European Parliament. Therefore, the actual implementation is not expected before the summer of 2002. Also in

June 2001, the European Commission adopted emergency measures to help the recovery of the stocks of Northern hake, which is caught in the region stretching from the Bay of Biscay to Kattegat.

Roll-over into 2001 of unused 2000 quota of certain EU member states occurred for horse mackerel, blue whiting, common sole, plaice, anglerfish, megrims, and herring. For full details, see Commission Regulation No 1666/2001 of August 17, 2001, L223. EU member states which over-fished their agreed quotas in 2000 saw their quotas proportionally reduced in 2001. Fishing in excess of permitted landings only occurred in negligible volumes in 2000. Commission Regulation No 1666/2001 calculates the corresponding downward revision of the 2001 quota for the fish species concerned (herring, cod, saithe, hake, and mackerel).

Policy - Trade Agreements

Twenty-four years after the conclusion of the first fisheries agreement with a third country, the EU is, in 2001, party to 21 bilateral fisheries agreements. Furthermore, the EU is a contracting party to 10 regional fisheries organizations. The importance of international fisheries relations has grown over the years, with fisheries agreements accounting for 28.5 percent of budget appropriations for the Common Fisheries Policy (CFP) in 2000. Also, agreements have changed over time, from pure financial compensation towards patnerships with parties in the fisheries sector of the third country concerned. Fisheries agreements, currently representing about 40 percent of EU fish catches, will continue to play a major role in the CFP. In its green paper for CFP reform (see below), the EU Commission defines as one of its main objectives for the future the promotion of responsible and rational exploitation of fishery resources in international waters. Given that many third countries where EU fleets used to fish are now also confronted with depletion of fish stocks, the EU wants to gather forces and establish, where possible, partnerships between the EU and third countries. Very often, the third countries with whom the EU has concluded fisheries agreements are dependent on fish resources for their food security and economic development. The EU Commission aims at adapting fisheries agreements with a view to allowing those countries to develop their own fisheries sectors. Partnership agreements are referred to as key instruments in future external fisheries policy. The European Commission also stresses the need for a strong coherence with EU development and environmental policy.

During 2001, the EU extended or renewed fisheries protocols with several countries. Fisheries agreements were extended with Madagascar (extended for 3 years as of May 21, 2001), Guinea Bissau (extended for 5 years as of June 16, 2001), Cape Verde (extended for 3 years as of July 1, 2001), Gabon (extended for 3 years as of December 3, 2001), Mauritania (extended for 5 years as of August 1, 2001), and the Seychelles (extended for 3 years as of January 18, 2002). Pending the conclusion of the negotiations on the renewal of the fisheries protocol with Senegal, the EU Commission has proposed that the EU Council adopt two extensions, one covering the period May 1-July 31, 2001 and one for the period August 1-December 31, 2001.

In order to conclude on a new protocol, in some cases the EU had to give in on fishing opportunities, accepting a reduced number of EU vessels fishing in third country waters, a reduced tonnage limit, or more restrictive fishing zones. In a number of cases, the EU financial contribution was increased considerably, demonstrating the determination of EU authorities to secure agreement at any price. Furthermore, a substantial part of the financial resources will go to targeted measures aimed at improving the fisheries sector of the third country concerned.

Fisheries agreement with Morocco

To date, no agreement has been reached with Morocco, whose fisheries agreement with the EU expired on November 30, 1999. Numerous renewal negotiations between the EU authorities and the Moroccan government have not led to any concrete deal. Over the years, the size, needs and production of the Moroccan fleet has developed, resulting in the Moroccan government seeking to adjust the future fisheries agreement in order to reinforce the competitiveness of its fishing fleet. EU offers of structural assistance and investment into the Moroccan fisheries sector have been rejected by the Moroccan authorities, and divergence on the size of the financial package coming with the agreement is large. To compensate the Spanish and Portuguese fishermen who were forced to stop their fishing activities in Moroccan waters on November 30, 1999, the EU Commission has allocated a total of EUR 145 million of EU funds available under the Financial Instrument for Fisheries (FIFG) for 2000 and for 2001. In addition, the European Commission has put forward a proposal for a EUR 197 million aid package for the conversion of vessels and of fishermen that were, up to 1999, dependent on the fisheries agreement with Morocco.

Policy- Implementation of MAGP IV

A large portion of the EU's policy objectives and budget are aimed at member state fleet restructuring. The Multiannual Guidance Programs (MAGP) are designed to carry out these objectives, i.e. to reduce fleet capacity to a level that will ensure the long term balance between fishing effort and available fishing resources. In May 2000 the European Commission concluded that MAGP IV (1997-2001) failed to achieve conservation targets. The efforts at reducing fishing reportedly remained inadequate in relation to the dwindling levels of fish stocks. EU-wide fleet capacity reductions amounted to less than 3 percent over the period 1997-2000, far below the Commission's original proposed target of 15 percent. One year later, in May 2001, the Commission estimated that the EU fleet had at least 40 percent overcapacity compared to available fisheries resources. In the light of the expiry of MAGP IV at the end of 2001, EU fleet policy needs to be reviewed in the short term. The Commission has acknowledged that the current MAGP is very ineffective, difficult to manage and lacking in transparency. Therefore, future EU fleet policy will have to be simpler and more effective. Given that a general review of the Common Fisheries Policy (CFP) is due by the end of 2002 (see below), the European Commission decided that a structural review of fleet policy should be incorporated into the general CFP review. In order to bridge the intermediary year 2002, the existing MAGP IV will be extended for one year. This will ensure that currently applicable restrictions on the size of fishing fleets will continue. Some modifications were, however, suggested such as stricter rules on vessel construction and modernization aid.

Policy - Import Policy

The European Commission has published a list of non-EU countries from which the import of fishery products in any form intended for human consumption is authorized for an unlimited period. The list consists of two parts. The first includes countries which are considered to have processing systems and health standards equivalent to the EU's, and the second lists countries which have provided EU veterinary inspection authorities with a full and satisfactory report. The second group of countries, including the U.S., have provisional clearance, and the EU reserves the right to carry out inspection visits to verify the information. At present, 102 countries appear on the list, i.e., 58 countries under part I and 44 countries under part II. For details, see Commission Decision 2001/635/EC of August 16, 2001 (L221 of August 17, 2001). The list system also operates for bivalve molluscs, echinoderms, tunicates, and marine gastropods. For these products, tighter restrictions are imposed owing to the higher risks linked with them. At present, 14 countries appear on that list, i.e., 10 countries under part I and 4 countries under part II. For details, see Commission Decision 2001/675 of August 20, 2001 (L236 of August 20, 2001).

As of now, the EU has not undertaken inspection visits to the U.S. During the second half of 2001, an EU inspection visit to the U.S. for fishery products and live bivalve molluscs had been scheduled, but was put off at the last moment. Purpose of the inspection is to check on the equivalence of U.S. processing systems and health standards.

EU Council Decision 95/408 of June 22, 1995 stated that the list of countries with provisional clearance would expire on December 31, 2000. Given that the process of drawing up definitive lists of third country establishments was not yet completed, the European Council issued a Decision (2001/4/EC of December 19, 2000), extending the validity to December 31, 2003.

Import Policy - Import prohibitions and protective measures

Countries not appearing on any list are not permitted to export fishery products to the EU. Regardless of list, the EU authorities may take preventive measures in the form of import bans of certain fishery products originating in certain countries, or from specific establishments in those countries. For example, in September 2001, the European Commission decided to subject all shrimps coming from or originating in Indonesia and intended for human consumption to a chemical test. Importation is prohibited unless the test shows that no chloramphenicol, representing a potential risk for human health, can be detected.

In May 2001, an EU Council Regulation was issued which prohibits the imports of Atlantic bigeye tuna originating in Belize, Cambodia, Equatorial Guinea, Saint Vincent and the Grenadines, and Honduras. The measure followed the identification of these countries by ICCAT (the International Commission for the Conservation of Atlantic Tuna) as countries whose vessels fish Atlantic bigeye tuna in a manner which diminishes the effectiveness of ICCAT’s tuna conservation measures.

In April 2001, the EU Commission concluded that there was a risk for public health with regard to the imports of bivalve molluscs from or originating in Peru. An EU inspection visit to Peru had shown serious deficiencies with regard to hygiene in bivalve mollusc production areas, and had demonstrated that there were insufficient guarantees about the efficiency of the controls carried out by the competent authorities in Peru. The Commission has thereupon prohibited the imports from Peru of bivalve molluscs, with the exception of the Pectinidae products.

Import policy - Tariff quotas

Given that Community supplies of certain fishery products currently depend on imports from third countries, the EU Council has opened tariff quotas for which duties are partly or completely suspended. These quotas only apply if the declared customs value is at least equal to the reference prices fixed for the products in question. The majority of the tariff rate quotas are opened for the period January 1, 2001-December 31, 2003. Annual amounts of quota (in tons) are set for, among others, herrings, cod, tubes of squid, tuna loins, and cooked shrimps and prawns. See Council Regulation 2803/2000 of December 14, 2000 for more details.

Although tariff quotas, duty suspensions and concessionary arrangements with some countries are in place, EU fish processors feel that average duty costs on imports from third countries are still relatively high and inconsistent with the situation of import dependency resulting from restricted EU supplies.

Policy - Revision of the Common Fisheries Policy (CFP)

In the spring of 2001, the European Commission proposed its "Green Paper" (options paper) on the future of the CFP, which is due to expire at the end of 2002. The paper was intended to stimulate debate with all sectors of the EU fishing industry in 2001, allowing another full year for deliberation and decision in the European Parliament and the European Council in 2002. To date, several discussions have taken place, a public hearing included, whereby the problem issues arising from the current CFP have been clearly defined. The European Commission has admitted the failure of the past policy, referring to problem issues such as the depletion of commercial fish stocks, excess fleet capacity, illegal fishing, difficulties in providing job alternatives to fishermen, and fragmentation of fisheries enforcement between different member state authorities.

In the Green Paper, it is suggested to keep the system of TACs, but on a multi-annual basis. Generally, reactions from various parties in the EU fisheries sector have been positive on this proposal. Multi-annual quota would provide greater predictability for fishermen and it would also put an end to the, much-criticized, current system of "end-of-year-negotiating" for the TACs of the following year. The Commission proposes, however, to keep the concept of "relative stability", on which the national share-out of TACs is based. Some member states, for example Spain, have opposed to this, claiming that the national quota system is not consistent with EU treaty principles.

The Green Paper contains concrete proposals for the regionalization of fisheries management, whereby fishermen’s organizations will become responsible for the implementation of stock management programs in their own areas. This zonal management will allow the involvement of fishermen, pressure groups, and local communities in fishing management. Regional advisory committees will be established.

A new fleet policy, not based on MAGPs, and a shift of policy regarding bilateral fisheries agreements with developing countries, is elaborated on.

Various measures are suggested in order to improve EU regulation enforcement and monitoring techniques. The Commission is planning to use an "ecosystem approach", giving a higher priority to environmental and health considerations in its fisheries policy decision process. In those areas particularly, the European Parliament is expected to become much more influential in the decision-making process, through the increased use of the "co-decision procedure". Under the "co-decision procedure", the European Council is no longer in a position to overturn the European Parliament in the final stages of decision-making. Until now, the majority of CFP legislation has been decided on through the "consultation procedure". This means that the Parliament’s opinion must be obtained before a legislative proposal from the Commission is adopted by the Council, but it is the Council which takes the final decision.

Policy - marketing policy

Effective January 1, 2002, new EU labeling requirements regarding fishery and aquaculture products offered for retail sale in the EU, will apply. Detailed rules are set out in EU Commission Regulation 2065/2001 of October 22, 2001, Official Journal L278 Of October 23, 2001. The main objective is to provide consumers with information on the commercial designation and method of production of a fish species, and the area in which it is caught. The new labeling rules will strengthen the traceability of fisheries products, hence facilitate the monitoring of fisheries products from the ship to the shop and enhancing the checks on the quality of these products.

Trade - General

There is a deficit in the EU trade balance for fish and fish products, imports exceeding exports by between 2.5 MMT and 3.1 MMT over the last 10 years. In value, the deficit more than doubled from EUR 4.5 billion in 1989 to EUR 9.56 billion in 2000. The latter data exclude trade values of fish meal, unfit for human consumption. In all EU member states except Ireland, the import value of fish exceeds the value of exports. In terms of volume, imports of fish exceed exports in all EU member states except Ireland and the Netherlands.

Trade - Imports

In 2000, Spain was the principal importing EU member state, with total fish imports equaling 850,000 MT. Denmark, Germany, and the U.K. are also large importers, each accounting for between 400,000 MT and 500,000 MT of EU fish imports.

Fish fillets and other fish meat (727,000 MT in 2000) make up the largest part of total EU fish imports (3.47 MMT). Frozen fish (576,000 MT) and fresh or chilled fish (580,000 MT) together represent 33 percent of total imports. Imports of prepared or preserved fish amounted to 526,000 MT, while imports of molluscs and crustaceans equaled 444,000 MT and 322,000 MT, respectively.

The United States is a relatively important supplier for some specific fish species. During the calendar year 2000, EU imports from the U.S. and its share of total EU imports for the fish specie in question were as follows: salmon 20 kMT (7%), canned salmon 16 kMT (45%), lobster 8 kMT (39%), squid/cuttlefish 24.5 kMT (10%), groundfish 15 kMT (5%), groundfish fillets 4 kMT (1%), and flatfish 1 kMT (2%).

Total EU imports of lobster decreased by 8 percent in 2000. U.S. suppliers were succesful in increasing the volumes of lobster for the EU market, while Canada and Cuba saw their sales decrease by 13 percent and 21 percent, respectively. One reason for the increased market share of the U.S. is the price attractiveness of U.S. lobster relatively towards Cuban and Canadian lobster which both became more expensive in 2000.

Squid/cuttlefish imports increased by 37,000 MT (+19 percent), additional sales from Morocco (+16,000 MT), the Falkland Islands (+16,000 MT), the U.S. (+7,000 MT), and India (+3,000 MT) making up the largest part of the increase.

Salmon imports from the U.S. increased by 750 MT, which resulted in a stable U.S. market share of the EU salmon market. With 84 percent of the import volume, Norway remains the largest salmon supplier to the EU. In 2000, the EU imported an additional 8,000 MT of salmon from Norway, representing a 4-percent increase in volume and a 6-percent rise in value. Although still a small player, Chile has tripled its salmon volume to the EU in 2000. The Norwegian fish farmers' association fears that the competitiveness of Chile, which has rapidly expanded the output of farmed salmon, will continue to improve to the detriment of Norwegian salmon supplies to EU and Japanese markets. Given the agreement between the EU and Norway with regard to a minimum price for Norwegian salmon supplied to the EU, Norway is at a price disadvantage vis-a-vis other third countries. With salmon output increasing on a world level, market prices for (farmed) salmon have fallen considerably over the last year.

In 2000, the U.S. lost market share for canned salmon, supplying 1,645 MT (minus 19 percent) less than in 1999. For groundfish, the U.S. fell back from being the third largest supplier in 1999 to the position of seventh largest supplier in 2000. Namibia and South Africa considerably improved their market share for groundfish, by tripling and doubling, respectively, their sales to the EU market. EU imports of groundfish fillets increased by 20 percent, the U.S., however, suffering a 43-percent reduction in sales.

Trade - Exports

In 2000, the Netherlands and Spain were the principal EU exporters, together representing 56 percent of the total volume of fish and fish products exported. While the EU market is in deficit for most fish species, exports do exceed imports for mackerel and horse mackerel. These are fish species for which there is no traditional consumer market in the EU.

SECTION II: STATISTICAL TABLES

EU-15 IMPORTS AND EXPORTS OF FISH AND FISH PRODUCTS: JANUARY-DECEMBER 2000
Average exchange rate used: EUR 1=U.S. $ 0.924

Product: Salmon					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.$		MT	1,000 U.S.$
U.S.	6531	35818	U.S.	19588	42140
Poland	2035	7451	Norway	228474	838318
Japan	1365	8987	Faroe Isles	17776	65254
Switzerland	625	2925	Canada	4150	8946
Russia	515	1614	Chili	1144	5550
Norway	315	900	Poland	241	764
Canada	244	1089	Colombia	230	521
Lebanon	211	1545	Russia	199	408
Czech Republic	188	655	Iceland	113	518
South Korea	178	126	Peru	93	125
Total third countries	13641	66726	Total third countries	272215	963111

Product: Canned salmon					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.$		MT	1,000 U.S.$
U.S.	29	429	U.S.	15900	66527
Switzerland	30	253	Canada	15480	57308
Estonia	27	18	South Korea	994	3920
Poland	27	82	Norway	827	8149
Lithuania	16	35	Chile	824	5470
Malta	13	72	Thailand	659	1396
Czech Republic	10	72	Russia	412	907

Cuba	9	20	Iceland	78	734
Japan	9	71	Faroe Isles	27	232
Melilla	8	23	Indonesia	23	36
Total third countries	288	1887	Total third countries	35258	144748

Product: Groundfish					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.$		MT	1,000 U.S.$
U.S.	259	1396	U.S.	14769	27302
Egypt	11370	785	Norway	63479	122558
Poland	2476	5036	Russia	57369	120075
Algeria	1106	1351	Namibia	37231	81258
Canada	572	2377	South Africa	32439	74367
Bosnia-Herzegovina	567	567	Chile	19707	50140
Nigeria	562	125	Iceland	16065	39166
Norway	510	1097	Argentina	13773	23617
Japan	447	636	Faroe Isles	9572	21642
Switzerland	263	1331	Poland	6154	9203
Total third countries	20904	19124	Total third countries	297464	614253

Product: Groundfish fillets					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.$		MT	1,000 U.S.$
U.S.	1942	9011	U.S.	4148	7414
Switzerland	1197	7542	Russia	104908	209391
Algeria	543	752	China	83556	146610
Norway	468	1275	Norway	51918	215258
Lithuania	178	319	Iceland	38071	185182

Australia	157	1029	Poland	19640	66775
Poland	144	284	Faroe Isles	18749	70032
Russia	137	383	Peru	10572	16716
Canada	108	755	Chile	9862	22493
Iceland	100	233	Lithuania	1789	7259
Total third countries	6149	26242	Total third countries	349903	970170

Product: Flatfish					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.$		MT	1,000 U.S.$
U.S.	1560	10713	U.S.	952	4991
Japan	9082	22015	Norway	8373	29411
Taiwan	4135	16616	Greenland	5770	17860
Poland	2750	2510	Morocco	5616	12685
Philippines	2159	602	Russia	3813	8382
China	1156	3017	Faroe Isles	3632	12084
South Korea	1038	1067	Iceland	3413	10917
Switzerland	395	4029	Mauritania	2522	7079
Canada	395	1307	Senegal	1818	3405
Hong Kong	293	1970	Belize	1524	2252
Total third countries	24361	67571	Total third countries	41990	121949

Product: Lobster					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.$		MT	1,000 U.S.$
U.S.	8	94	U.S.	7911	97549
Japan	323	4658	Canada	7465	87690
Hong Kong	36	382	Cuba	2843	41519

Switzerland	34	505	Morocco	326	5815
Taiwan	22	88	South Africa	212	4444
Malta	19	117	Chile	209	2509
Norway	17	274	Mexico	144	2845
Slovenia	12	195	Australia	125	2847
Russia	10	111	Ghana	122	1180
Singapore	6	67	Mauritania	85	1139
Total third countries	538	7449	Total third countries	20035	255951

Product: Squid/cuttlefish					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.$		MT	1,000 U.S.$
U.S.	238	553	U.S.	24481	29140
Croatia	2399	4748	India	39789	86191
Slovenia	1564	3049	Falkland Isles	38843	53734
South Africa	933	1190	Morocco	34841	102979
Namibia	707	795	Thailand	27097	65530
Japan	667	1647	China	9836	18349
Switzerland	466	1652	Mauritania	7938	19955
Thailand	296	585	South Africa	6844	30651
Turkey	291	376	New Zealand	5923	9915
Algeria	288	410	Vietnam	5168	11780
Total third countries	10680	20779	Total third countries	236808	503920