



TROUT TRADE AND MARKET ASPECTS ON THE EUROPEAN LEVEL

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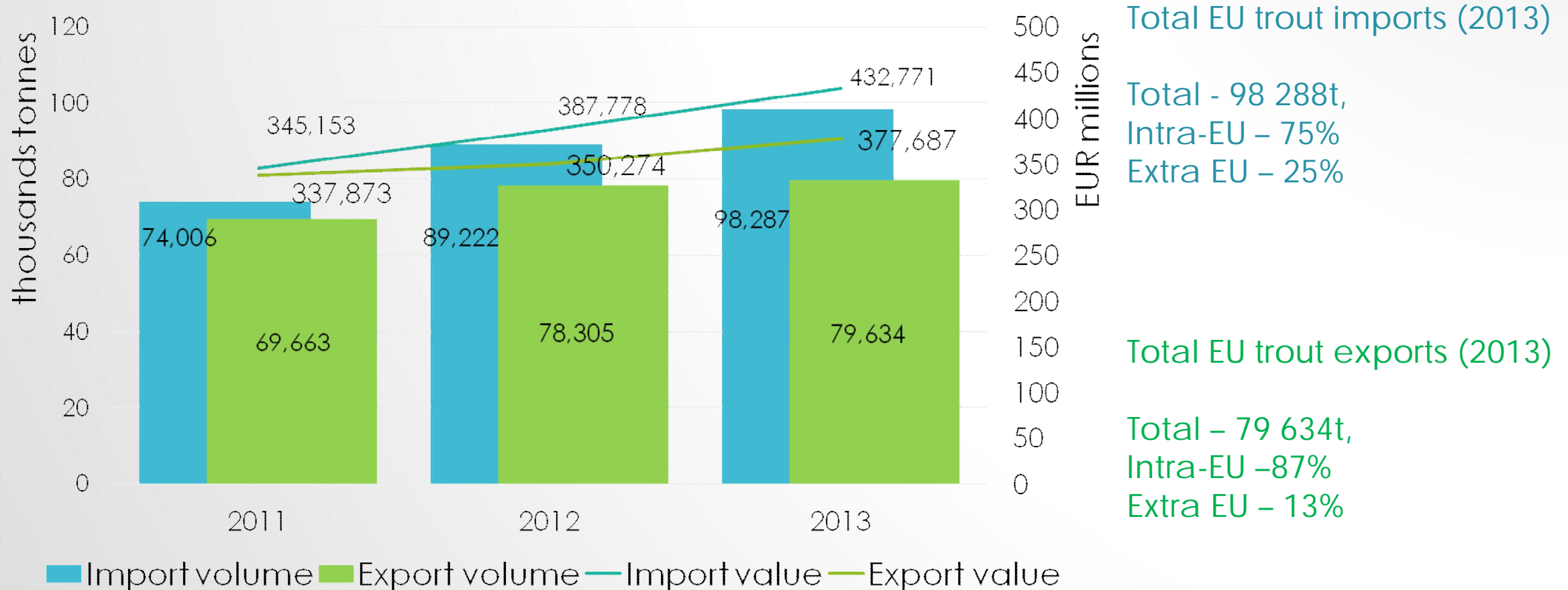
Eurofish International Organisation

10 October 2014

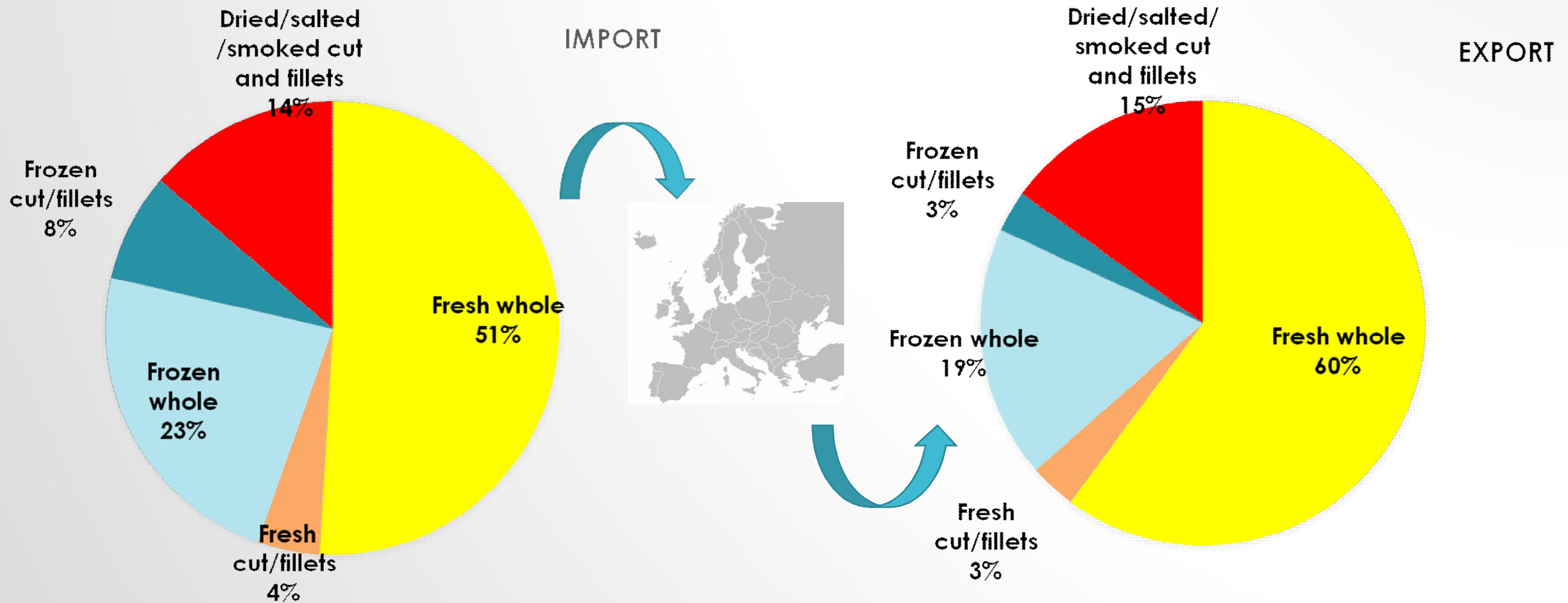
Gdansk, Poland

Eurofish
INTERNATIONAL ORGANISATION

TROUT TRADE IN THE EU

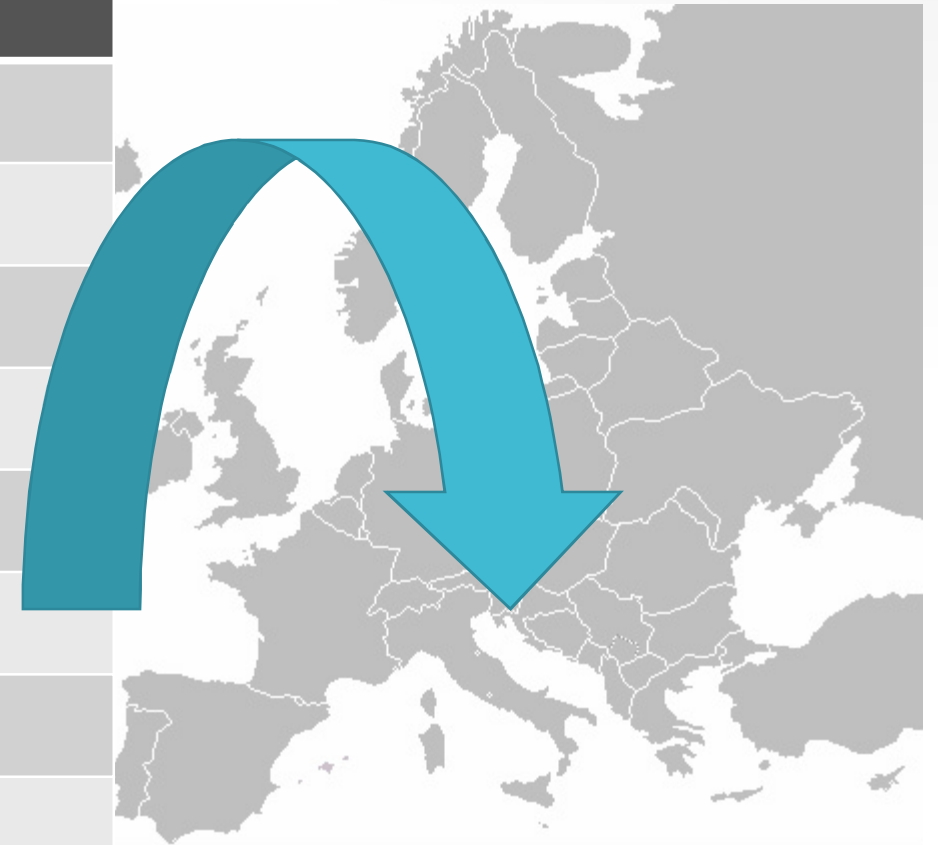


TROUT TRADE BY PRODUCT FORMS (2013)



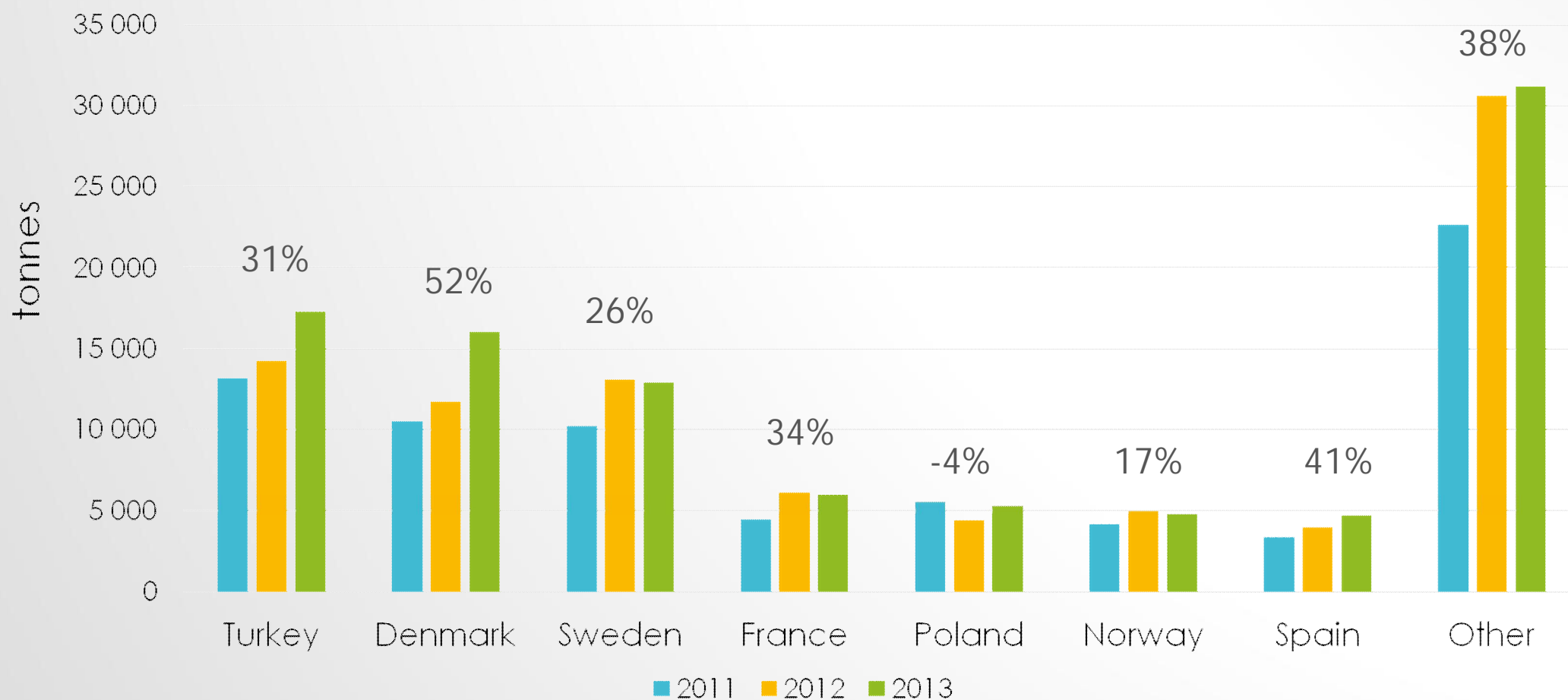
MAIN SUPPLIERS TO THE EU (2013)

	2013 (tonnes)	Share
Turkey	17 284	18%
Denmark	16 057	16%
Sweden	12 906	13%
France	5 933	6%
Poland	5 320	5%
Norway	4 832	5%
Spain	4 716	5%
Other	31 240	32%
Total	98 288	100

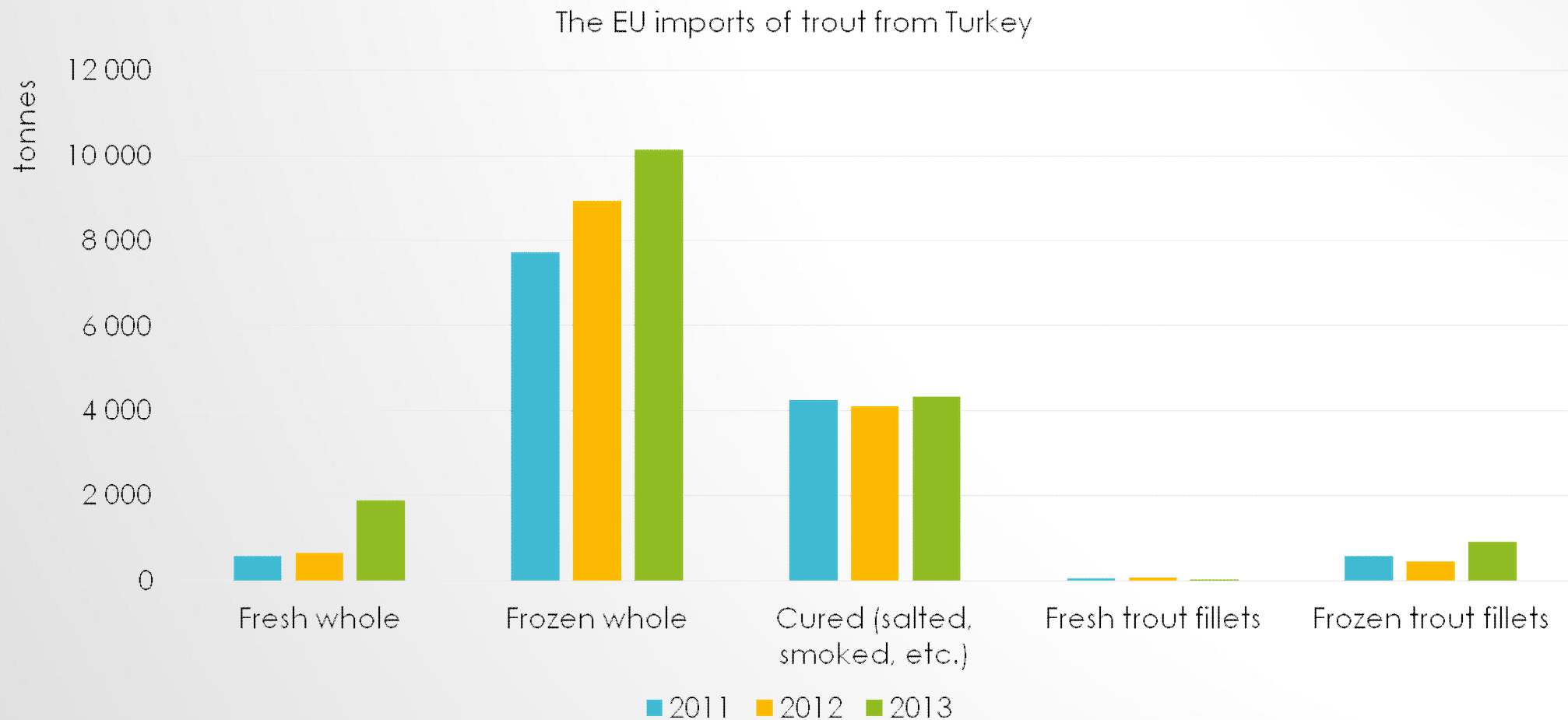


MAIN SUPPLIERS OF TROUT

The EU imports of trout



SELECTED SUPPLIERS - TURKEY

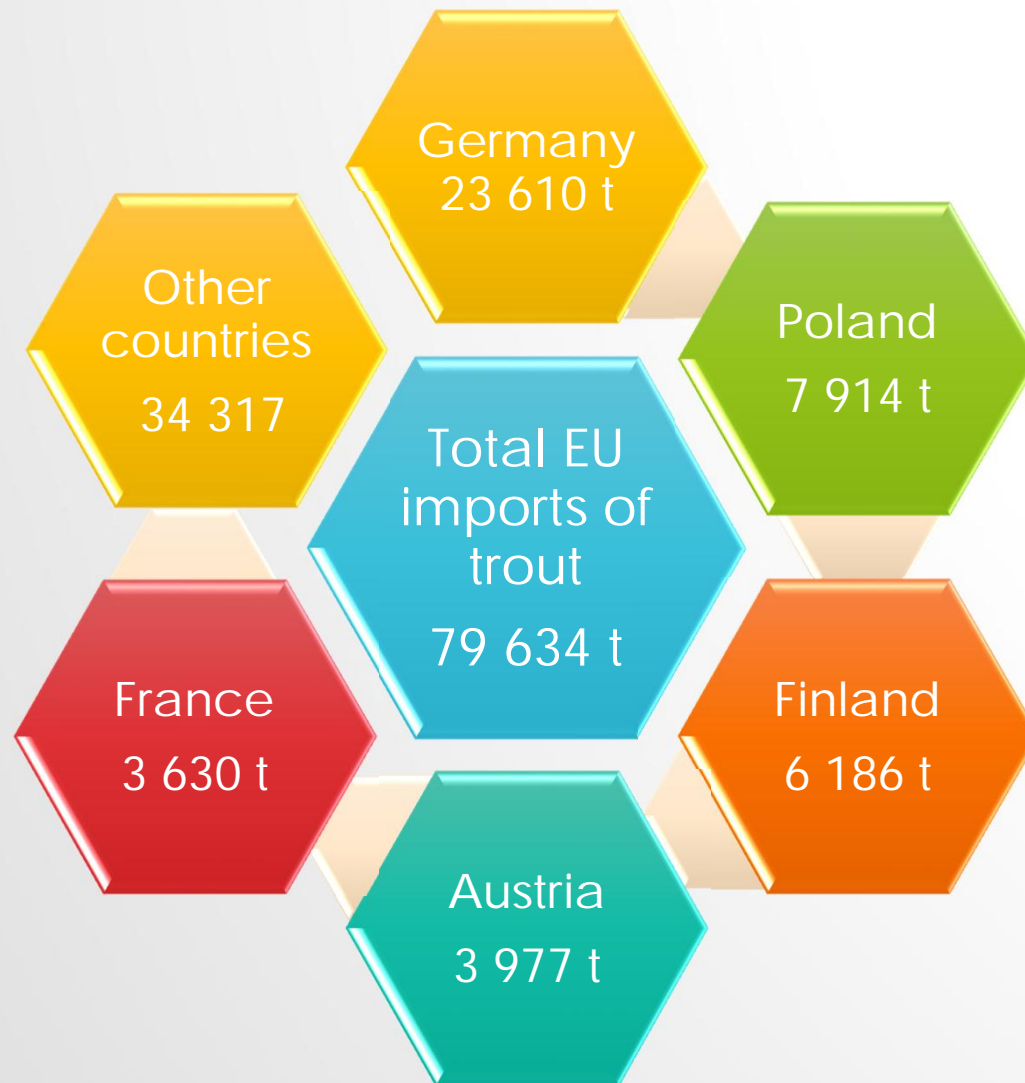


SELECTED SUPPLIERS – DENMARK (2013)

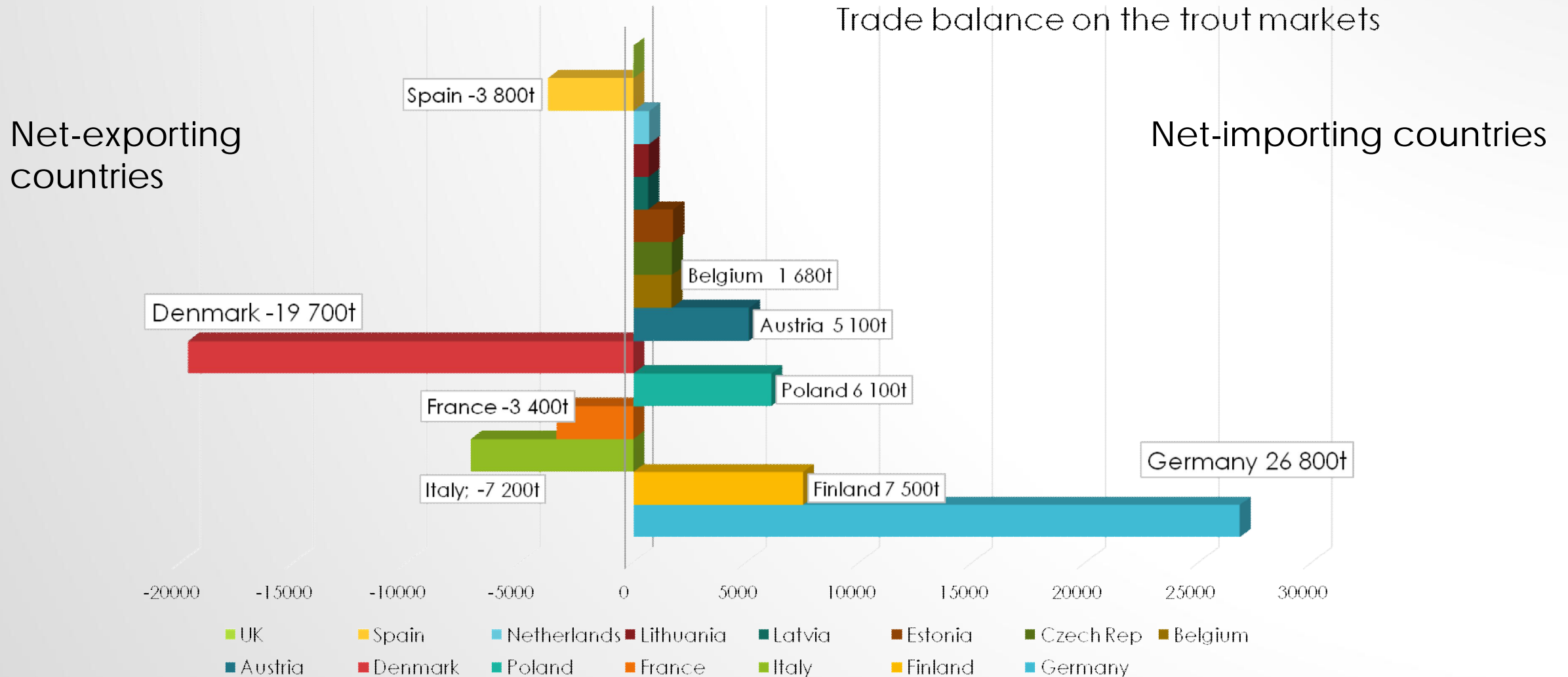
- Rainbow trout production was 31 900 tonnes (67% is portion-size trout and 33% is large-size trout),
- Denmark exported totally 22 300 tonnes of trout worldwide
- To the EU – 16 057 tonnes, where Germany is the main market (9 050 tonnes)
- 50% of Danish trout is exported as fresh whole, 31% as whole frozen, 17% salted-smoked-dried and the rest as fillets,
- Denmark imports about 2 600 tonnes of trout mainly from Norway, Turkey, Poland and Germany,
- 62% of the imported trout is whole, while the rest are trout fillets



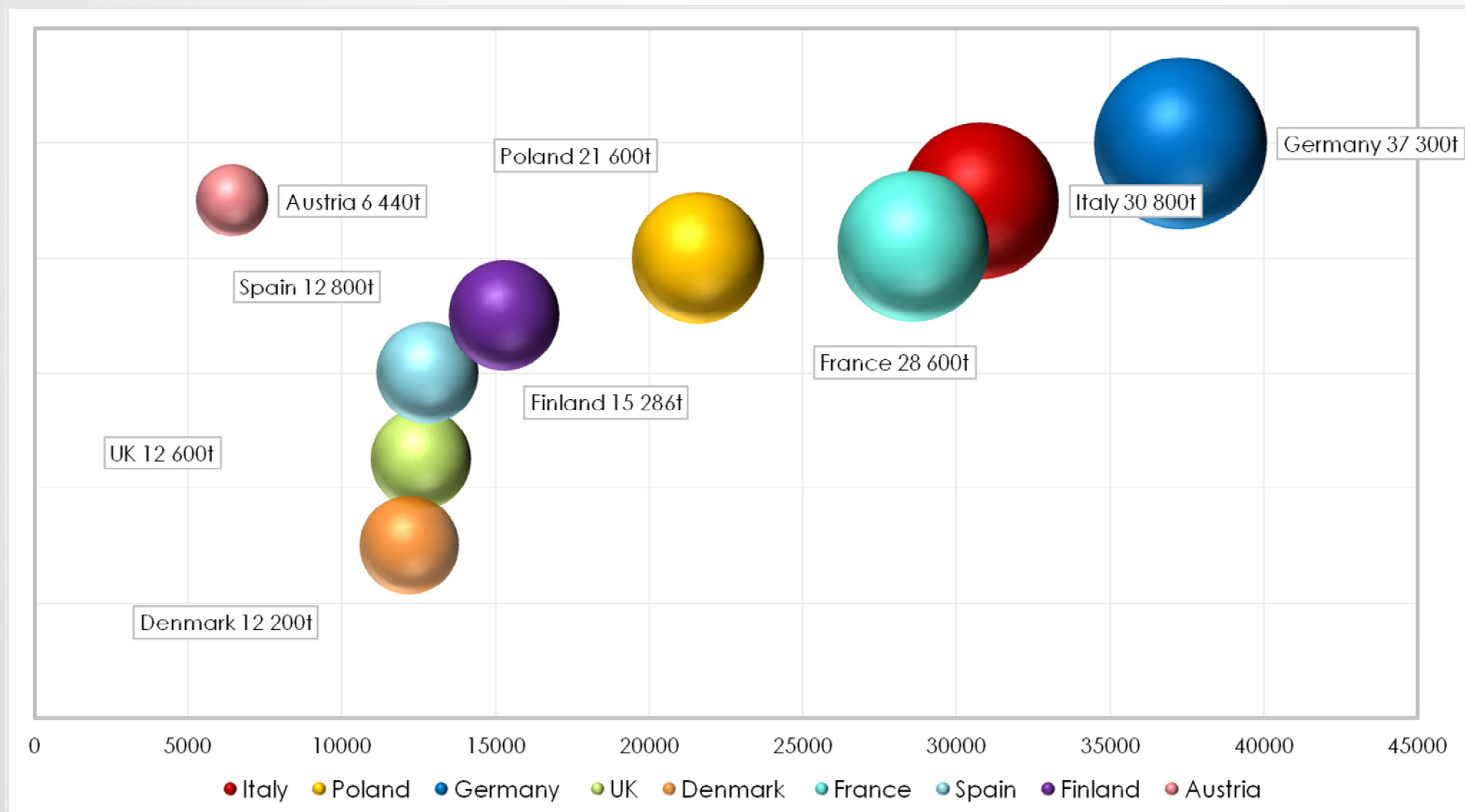
MAIN IMPORTING COUNTRIES IN THE EU (2013)



TRADE BALANCE (WITHOUT COUNTRIES' OWN PRODUCTION)



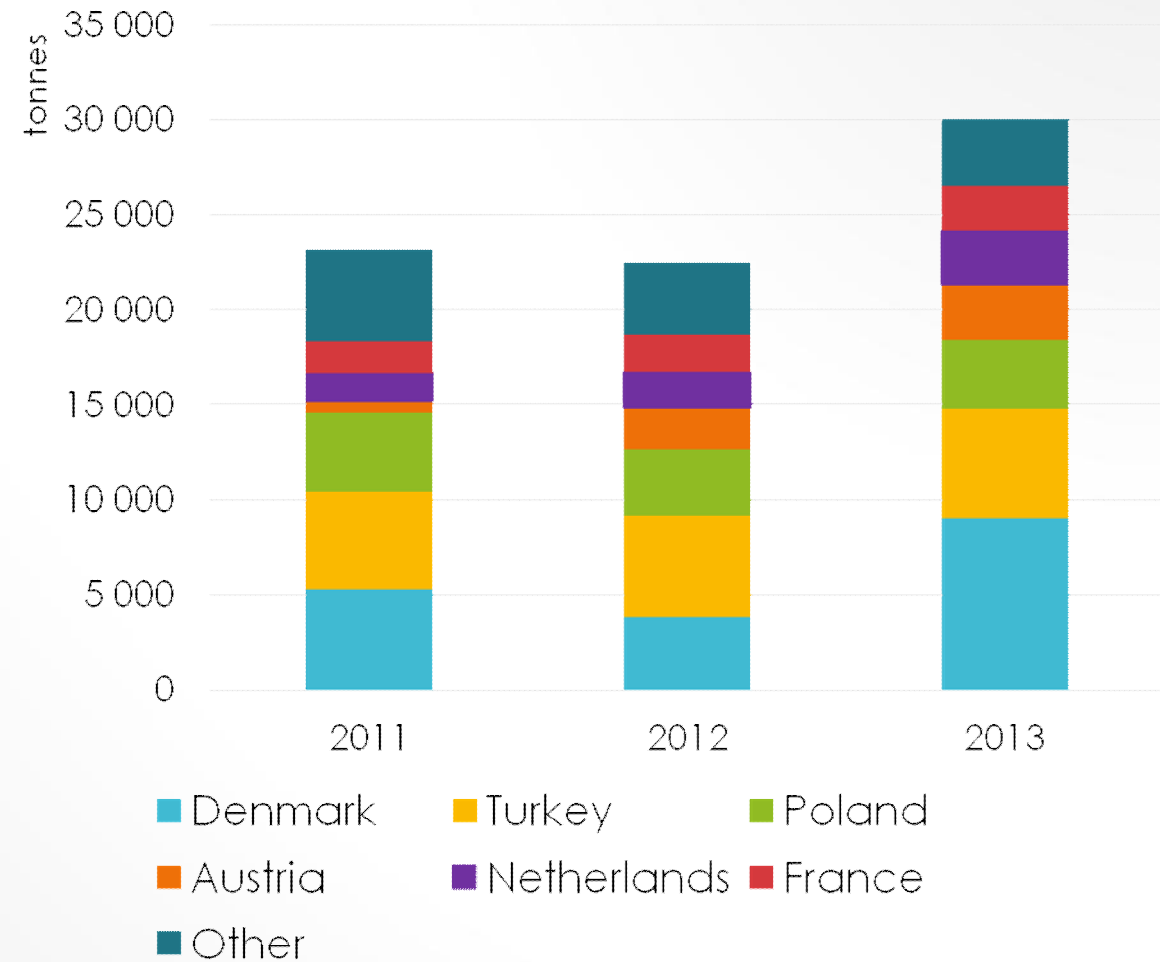
MAIN TROUT CONSUMPTION MARKETS



GERMANY

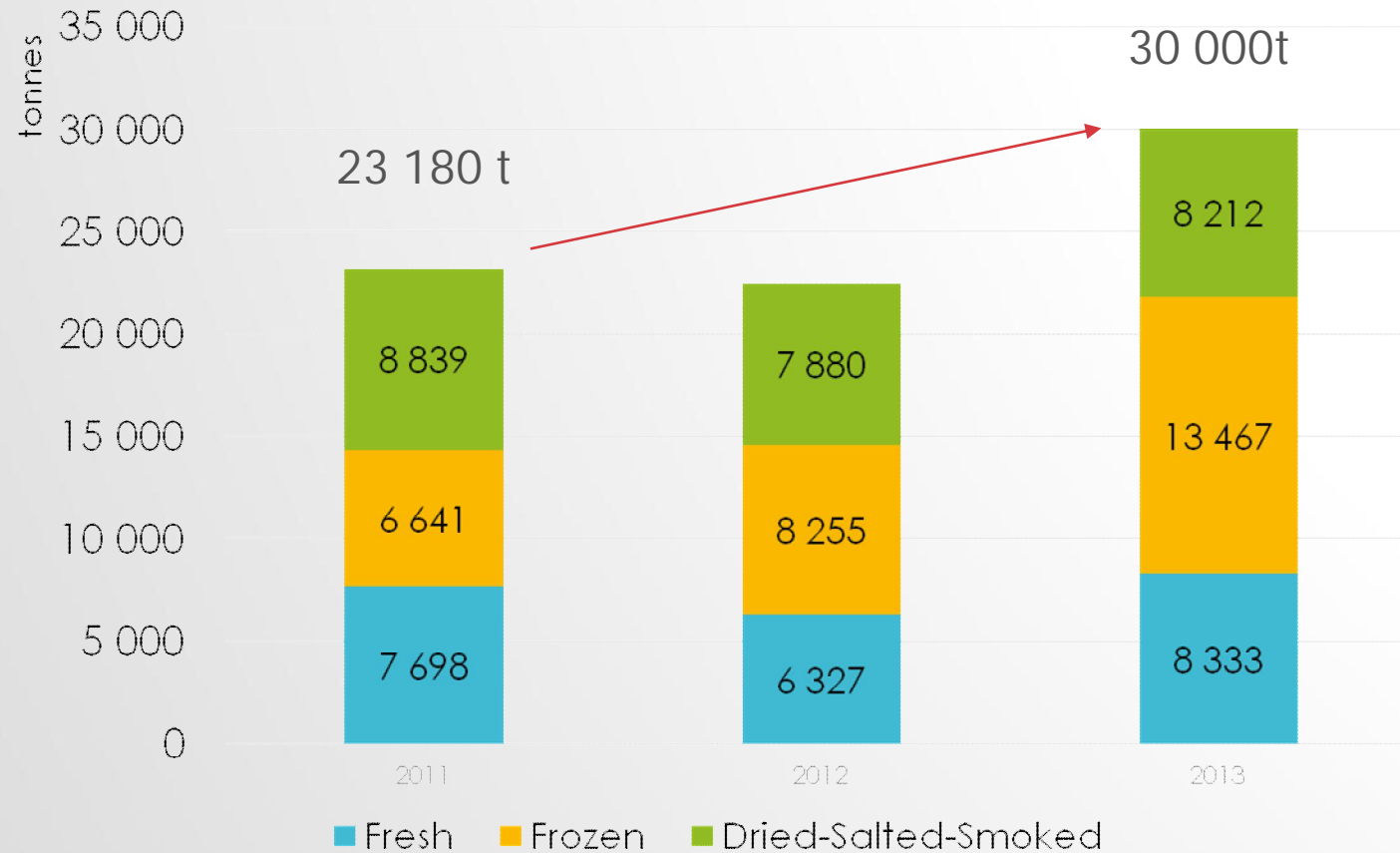
- The largest importer in the EU with a share of over 30%
- The total imports are 30 000 tonnes valued EUR 145 million (incl. trout from Extra-EU),
- The current market size is estimated to 37 300 tonnes,
- The major suppliers:
 - Denmark (40% fresh trout, 50% frozen trout and 10% salted/smoked/dried),
 - Turkey (80% frozen trout),
 - Poland (95% salted/dried and smoked trout)

German imports of trout products



GERMANY

German imports of trout by categories



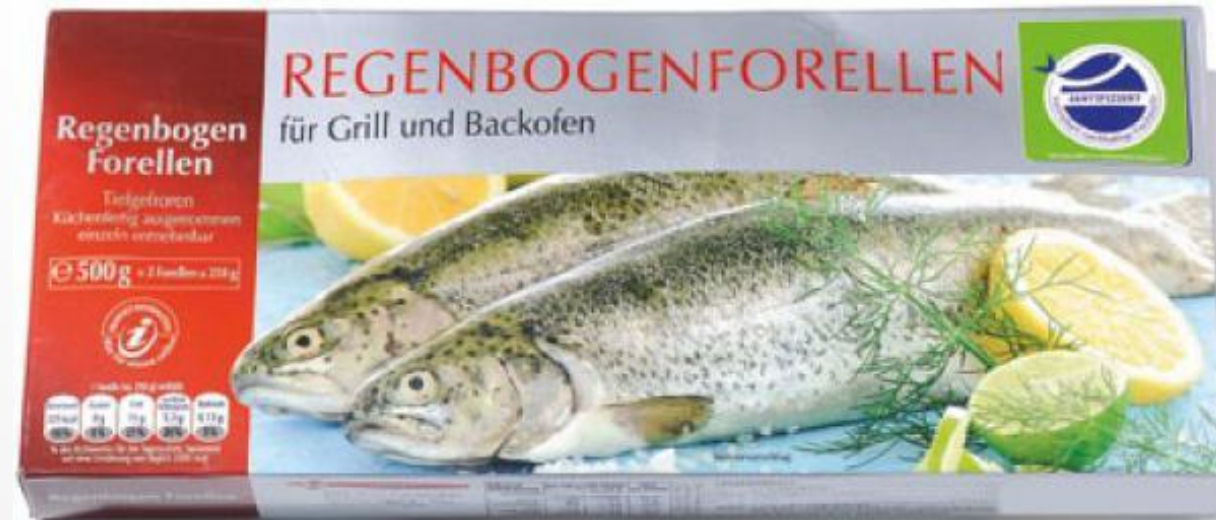
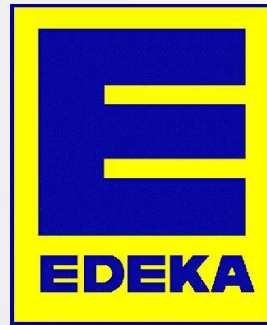
- The main products categories: frozen (55%), fresh (25%) and smoked/salted/dried (25%)
- Increase of the total trout imports by 30% in 2011-2013 due to the doubled imports of frozen trout products from Denmark.

GERMANY

- Most purchases (77%) are made in supermarkets, and from 2013, most retailers are selling certified sustainable fish products only;
- Best opportunities exist for sustainable fresh, chilled or frozen smaller-portion trout fillets. Standardized uniform high quality at competitive price!
- Consumers are demanding more sustainable products, special attention to locally sourced, organic, natural, fair trade, carbon neutral products.

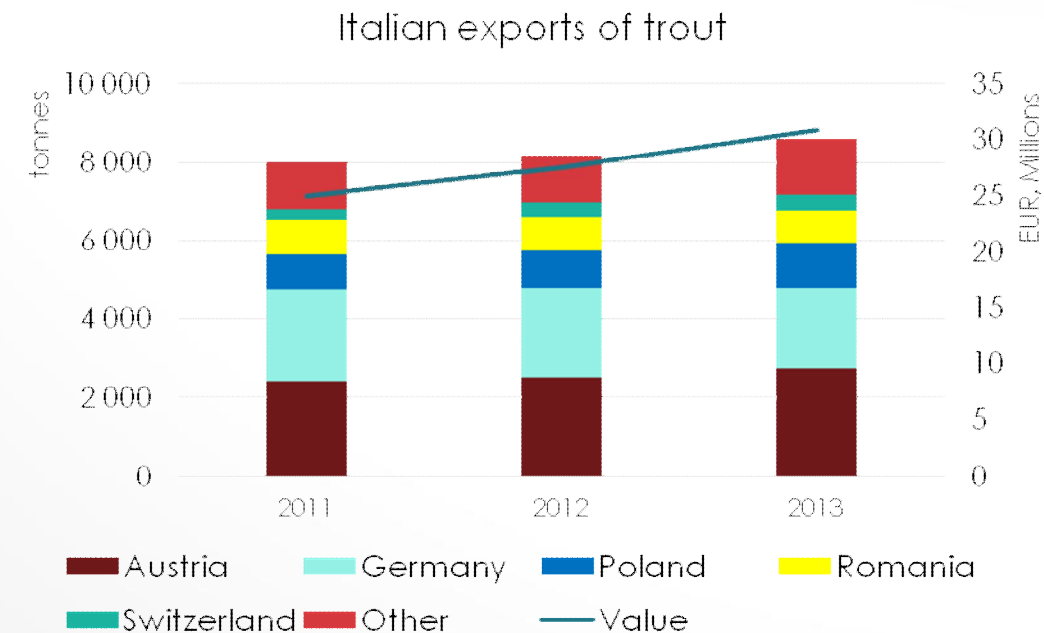
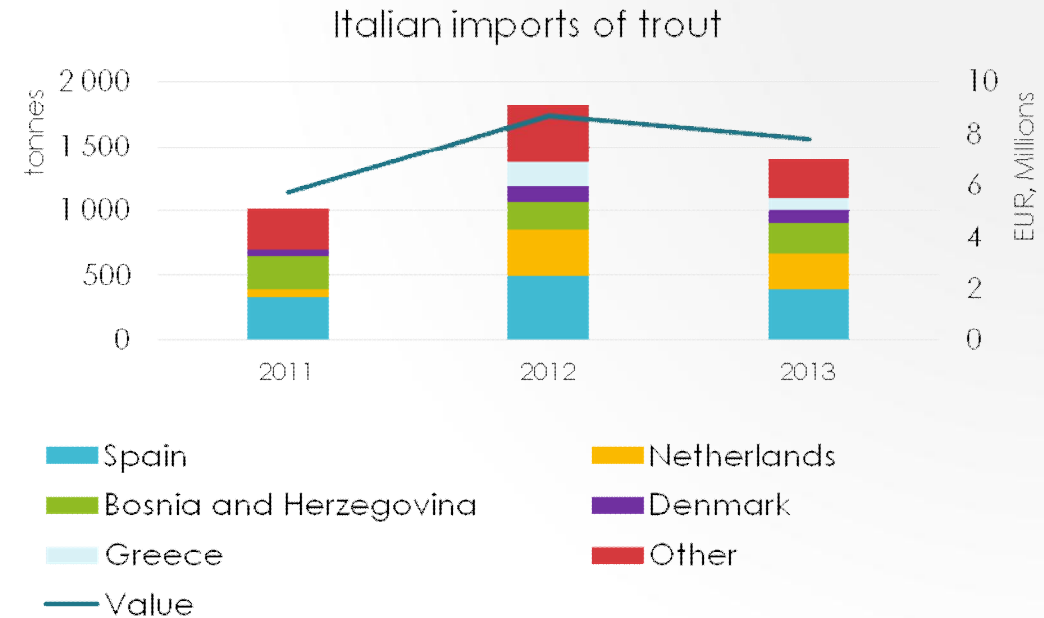


GERMANY



ITALY

- The second largest EU market for trout estimated at 31 300 tonnes,
- Domestic production of 38 000 tonnes (95% portion-size rainbow trout)
- Imports of 1 400 tonnes mainly from Spain, Netherlands, Denmark and Bosnia and Herzegovina
- Exports of 8 000 tonnes mostly to Austria, Germany, Poland, Romania and Switzerland.
- 2011-2013: upward trend in exports (+7%), while mixed tendencies in imports.



ITALY

- Currently low prices, however consumers have not enlarged the share of fresh fish such as trout and other species regardless strong promotion campaigns in the retail sector,
- Generally weakness of the market with a decrease in fish consumption caused by decreasing purchasing power,
- Especially consumption of fresh fish species is declining, while other categories (canned, dried, salted, smoked and frozen) increased.



ITALY



TOTM

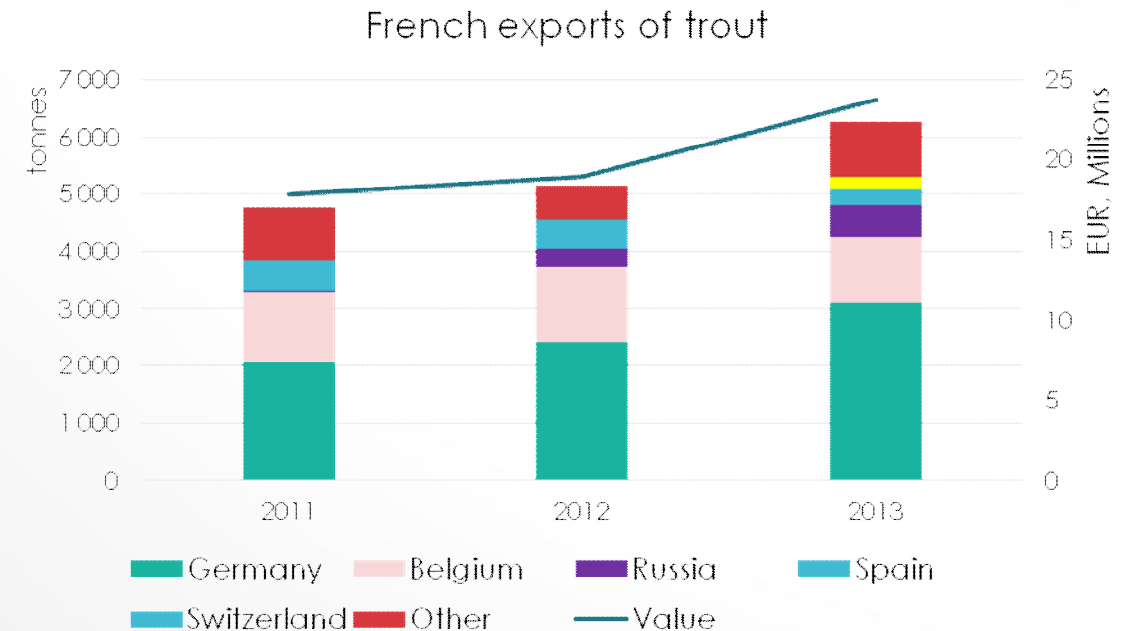
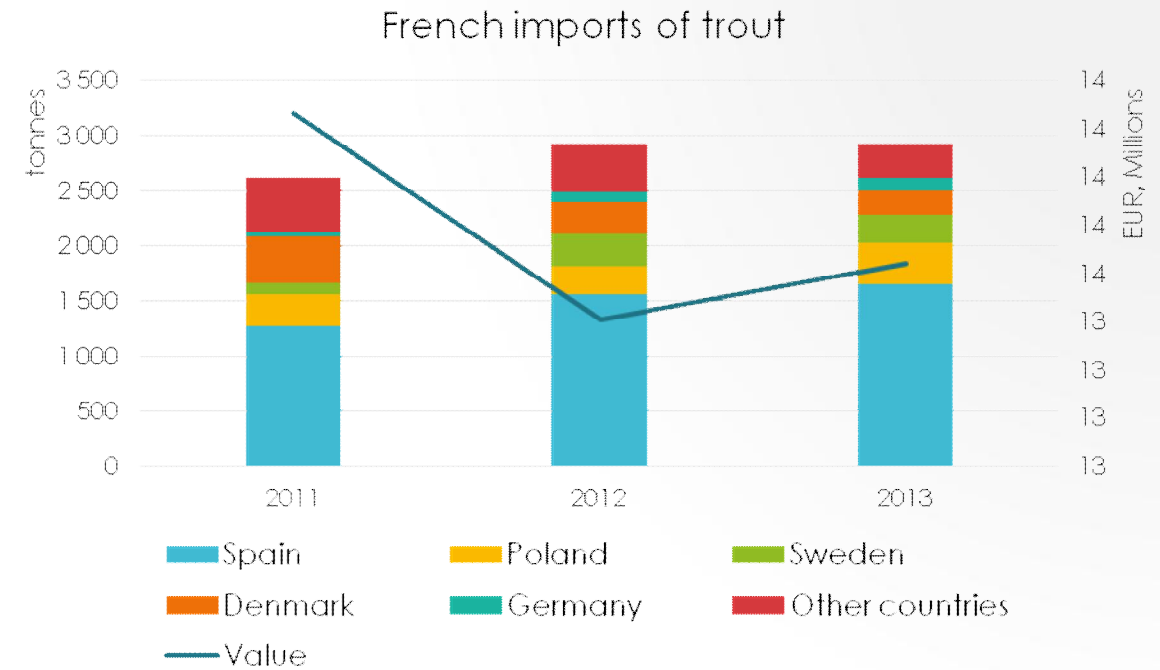
TOTM

CONVENIENZA PER TUTTI

<p>MORTADELLA BOLOGNA I.G.P. AMABILE FELSINEO al taglio, al kg</p> <p>Anzi ch� 13,20 €</p> <p>9,90 €</p> <p>SCONTO 25%</p>	<p>PROSCIUTTO GOTTO ALTA QUALIT� NONN� ANGELO DENTESANO al taglio, al kg</p> <p>Anzi ch� 20,50 €</p> <p>15,37 €</p> <p>SCONTO 25%</p>
<p>MOZZARELLA DI BUFALA CAMPANA D.O.P. BUFALE bocconcini, 250 g</p> <p>Anzi ch� 3,60 €</p> <p>2,88 €</p> <p>SCONTO 20%</p>	<p>VERDESCA PARMACHEF olio e limone take-away, 500 g</p> <p>Anzi ch� 11,90 €</p> <p>8,33 €</p> <p>16,66 € al kg</p>
<p>EMMENTALER SWITZERLAND D.O.P. al taglio, al kg</p> <p>Anzi ch� 12,90 €</p> <p>10,32 €</p> <p>SCONTO 20%</p>	<p>SPECK DELL'ALTO ADIGE I.G.P. MOSER al taglio, al kg</p> <p>Anzi ch� 19,90 €</p> <p>14,92 €</p> <p>SCONTO 25%</p>
<p>CALAMARO PULITO decongelato, al kg</p> <p>Anzi ch� 14,90 €</p> <p>11,92 €</p> <p>SCONTO 20%</p> <p>NEI PUNTI VENDITA CON IL BANCO PESCHERIA</p>	<p>LINGUA LIGURE ALL'OLIO al kg</p> <p>Anzi ch� 7,10 €</p> <p>5,68 €</p> <p>SCONTO 20%</p>
<p>TROTA IRIDEA SALMONATA al kg</p> <p>Anzi ch� 7,30 €</p> <p>5,84 €</p> <p>SCONTO 20%</p> <p>NEI PUNTI VENDITA CON IL BANCO PESCHERIA</p>	<p>MINI DONUT GLASSATO FARCITO cioccolato, nocciola o crema vaniglia, decongelato, al pezzo</p> <p>Anzi ch� 0,39 €</p> <p>0,31 €</p> <p>SCONTO 20% ALLA CASA</p>

FRANCE

- The third largest market for trout (about 28 600 tonnes),
- Domestic production of 32 000 tonnes (65% portion rainbow trout and 35% large-size rainbow trout),
- Imports of 2 919 tonnes with Spain as the main supplier (57%),
- Exports of 6 280 tonnes worldwide with Germany and Belgium as the main markets (68% of the total exports)



FRANCE



SUMMARY

- In 2011-2013, the EU imports of trout increased totally by 30% (volume terms), while the exports went up by 14%. In 2012-2013, the growth rate for trout export was 2% due to the decreased trout production in the EU, while the imports growth was 14%.
- Fresh whole trout remains the largest traded product category in the EU import and exports of trout, keeping shares of 50% and 60% respectively in 2013,
- In the EU imports of trout (2011-2013) the main growth was observed in the category of fresh trout (32%), frozen trout (44%) and fillets.
- The category of smoked/dried and salted trout imports has been affected by mixed trends (-13% in the period 2011-2013 and +7% in 2012-2013). In the exports of trout from the EU, all categories had stable and upwards trends.

SUMMARY

- Turkey and Denmark are currently the largest suppliers of trout to the EU market,
- Turkey is emerging as the growing producer and supplier of rainbow trout due to the tighter economic conditions in other countries,
- Traditional and the largest trout markets are Germany, Italy, France and Poland,
- “Newer” markets: Ireland, the UK, Bulgaria, and other,
- Diversified channels of distribution for the producers and strategies for niche markets.

THANK YOU FOR YOUR ATTENTION!

DZIĘKUJĘ ZA UWAGĘ!