

Market, Trade Flows Of Frozen Tilapia In E.U.



China is the main source for the relatively low volume of tilapia imported to the European Union.

Summary:

Within the European market of frozen fish, tilapia play a minor role, with average yearly import quantities below 20,000 mt. China provides more than 80% of the total, while Indonesia is the second-largest exporter. Vietnam is a fast-growing newcomer. On average, Asian tilapia is cheaper than imports from Africa or Latin America. The majority of the tilapia imported to Spain, Poland and Germany is consumed in local markets, while the Netherlands and Belgium tend to re-export tilapia fillets to other E.U. countries.

Despite being one of the most popular farmed freshwater fish around the world, tilapia is an almost unknown product in the displays of European shops. Within the European market of frozen fish fillets, tilapia play a minor role, with average yearly import quantities below 20,000 mt. These amounts represented less than 0.003% of a market of 5.5 mmt of fish fillets in 2013, and only 11.4% of an aggregate of other tropical farmed species that include *Pangasius* and Nile perch. The latter are much better known by European consumers.

Tilapia Supply In E.U.

With very limited contributions from

other continents, tilapia fillets in the European Union are mainly imported from Asia (Table 1). Tilapia imports from Asia have remained fairly stable, with a minor increase of about 400 mt between 2010 and 2013. While not a majorly significant increase, the quantities in 2013 represented an important recovery from a fall to less than 16,0000 mt in 2012.

Within Asia, China is the most important exporter, providing more than 80% of the total imported quantities of tilapia (Table 2). Indonesia is the second-largest exporter to the E.U., with annual amounts under 2,000 mt. The quantities from these two countries remained relatively stable since 2010, except for a decrease in 2012. Vietnam is a fast-growing newcomer whose exports of frozen tilapia fillets to the E.U. rose from 163

mt in 2010 to almost 1,000 mt in 2013 – a huge increase.

On average, Asian tilapia is cheaper than other imports from Africa or Latin America (Table 3). China is not only the leader in quantity, but also in price. The average import price was 2.53 euro/kg (U.S. \$3.22/kg) for frozen fillets, including transport costs and insurances. This price is about half of the recorded prices for Latin American imports – and even cheaper than for other Asian exporters.

Vietnamese prices are closer to the Chinese levels than those of Indonesia and Thailand. It is assumed that the differences in price also refer to differences in quality.



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Table 1. Regional sources for frozen tilapia fillets imported to the European Union.

Year	Import Volume (mt)		
	Africa	Latin America	Asia
2010	1.4	93.7	18,886.4
2011	64.7	81.0	18,776.4
2012	78.0	93.3	15,750.9
2013	0	31.0	19,290.7

Table 2. Main Asian sources for frozen tilapia fillets imported to the European Union.

Year	Import Volume (mt)			
	China	Vietnam	Indonesia	Thailand
2010	16,738.3	163.2	1,522.3	421.9
2011	16,308.9	425.3	1,700.0	315.0
2012	13,964.2	134.7	1,340.4	175.0
2013	16,014.1	980.0	1,901.1	214.9

Table 3. Prices including transportation and insurance costs for frozen tilapia fillets imported to the European Union.

Year	Price (euro/kg) (U.S. \$/kg)			
	China	Vietnam	Indonesia	Thailand
2010	2.42 (\$3.08)	2.35 (\$2.99)	3.85 (\$4.90)	3.08 (\$3.92)
2011	2.69 (\$3.43)	2.84 (\$3.62)	4.18 (\$5.32)	4.99 (\$6.35)
2012	2.58 (\$3.29)	3.03 (\$3.86)	4.66 (\$5.93)	6.65 (\$8.47)
2013	2.53 (\$3.22)	2.86 (\$3.64)	4.65 (\$5.92)	4.91 (\$6.25)

Table 4. Top tilapia-importing countries in the European Union in 2013.

Country	Volume (mt)	Price (euro/kg) (U.S. \$/kg)	Market Share (%)
Poland	5,400	2.26 (\$2.88)	28.06
Spain	5,222	2.47 (\$3.15)	27.14
Germany	2,016	3.29 (\$4.19)	10.48
Netherlands	1,778	3.49 (\$4.44)	9.24
Belgium	1,354	3.59 (\$4.57)	7.04

Table 5. Intra-European Union trade in frozen tilapia fillets.

Country	Tilapia Exports (mt)	Price (euro/kg) (U.S. \$/kg)	Internal Consumption (mt)	Gross Profit (%)	Export Value (1,000 euro) (1,000 U.S. \$)
Netherlands	1,246.1	3.94 (\$4.99)	532.4	13.01	5,551 (\$7,039)
Belgium	1,165.9	5.35 (\$6.77)	189.0	48.92	9,291 (\$11,782)
Poland	697.6	2.96 (\$3.75)	4,702.2	30.84	2,698 (\$3,421)
Germany	462.8	3.88 (\$4.91)	1,553.1	17.85	2,114 (\$2,681)
Spain	72.7	2.69 (\$3.41)	5,149.4	9.18	214 (\$271)

In such a case, Thailand would be the quality leader, along with Indonesia. Vietnam

may be attempting to directly compete with China for the price leadership.

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