



FISH TRADE AND CONSUMER TRENDS IN THE EU

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Eurofish International Organisation

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Eurofish
INTERNATIONAL ORGANISATION

EUROPEAN TRADE OF FISHERIES PRODUCTS (2015)



Extra-EU
import – **EUR
22.3 billion**

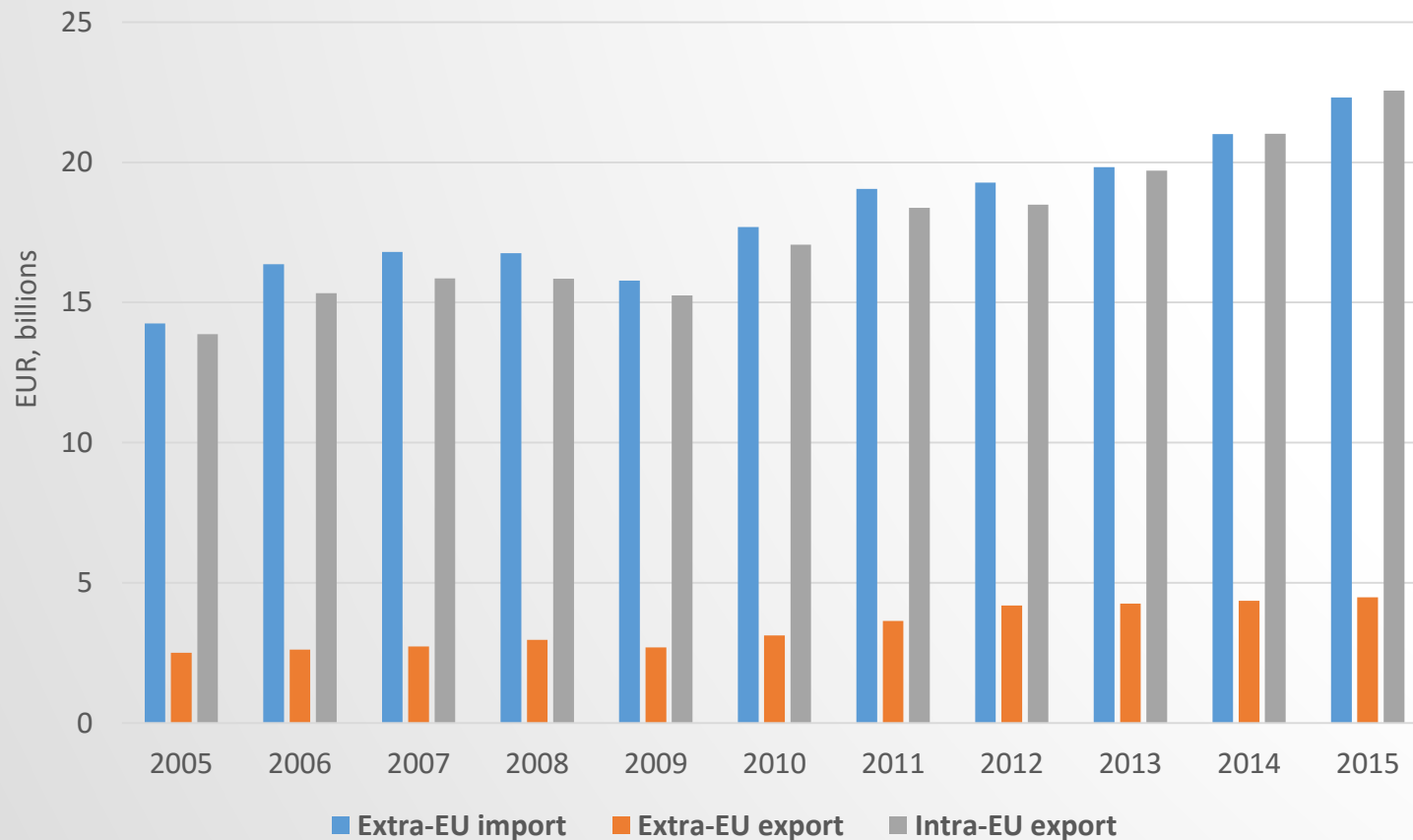


Extra-EU
export – **EUR
4.5 billion**



Intra-EU
export – **EUR
22.6 billion**

EU TRADE FLOW OF FISHERIES PRODUCTS



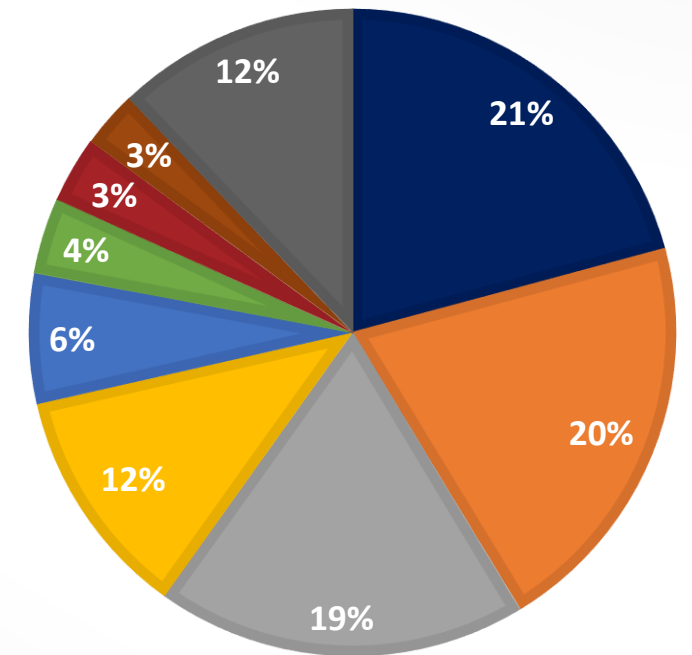
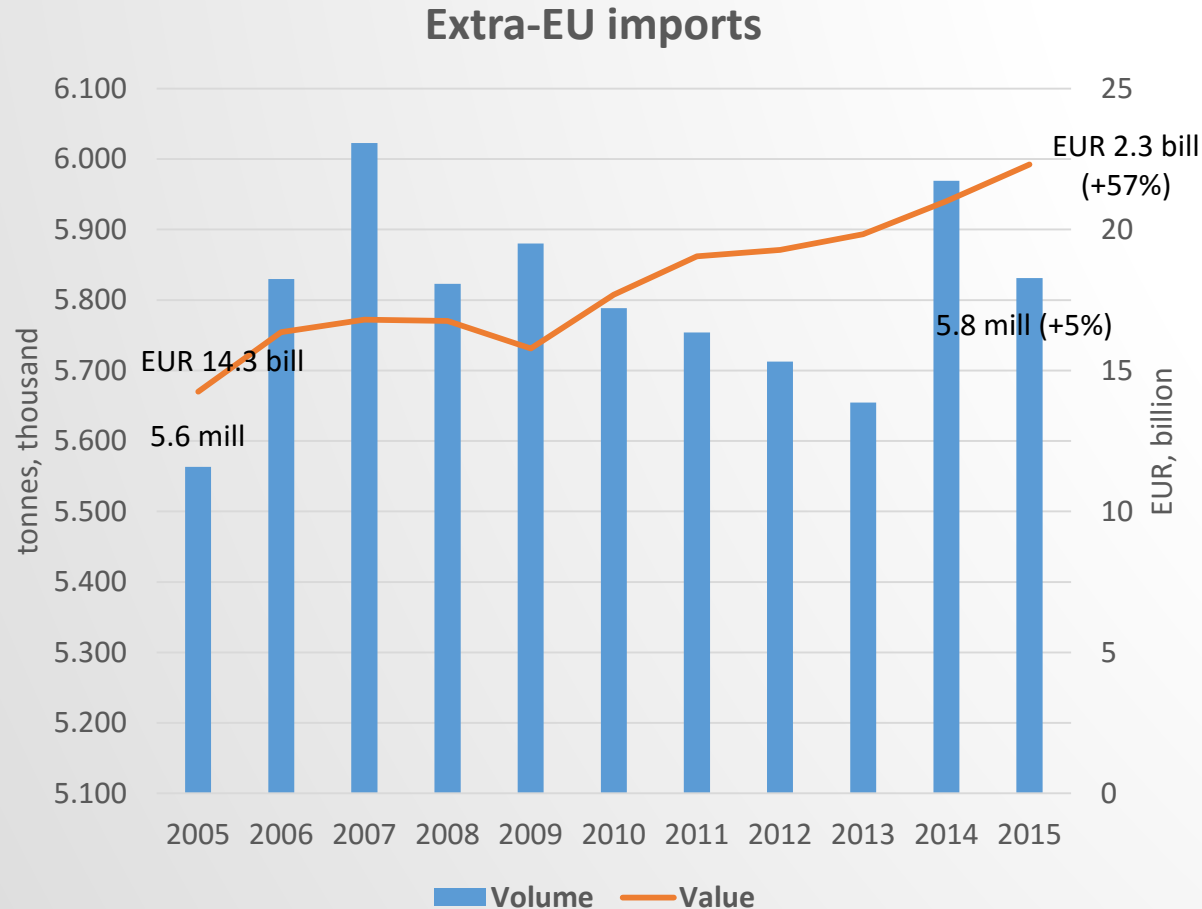
The trade flow (2015)

- Total trade of EUR 49,4 billion and 13.8 million tonnes,
- The overall growth in 2005-2015: +61% in value and 11% in volume;
- Trade development in 2005-2015:

	Extra-EU imports	Extra-EU exports	Intra-EU exports
Value	+57%	+79%	+63%
Volume	+5%	-4%	+26%

EUROPEAN EXTRA-EU IMPORTS

Extra-EU imports by commodity groups in value (2015)



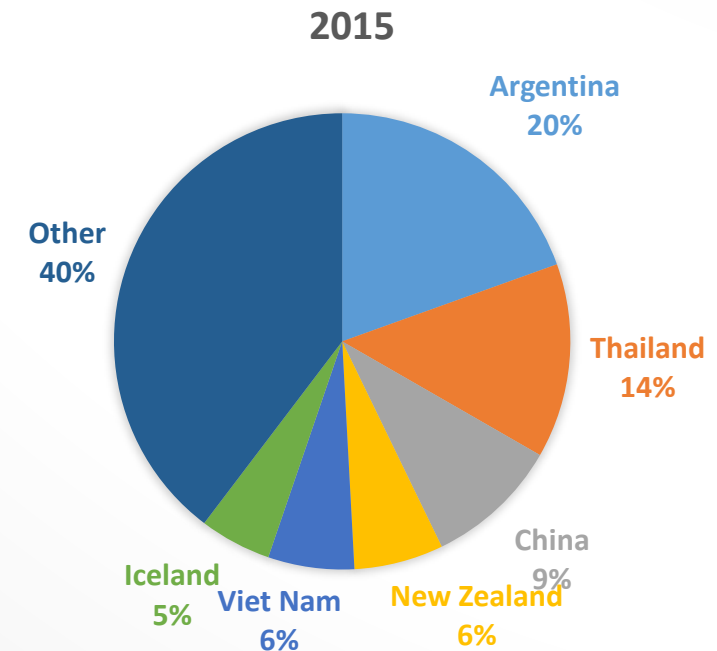
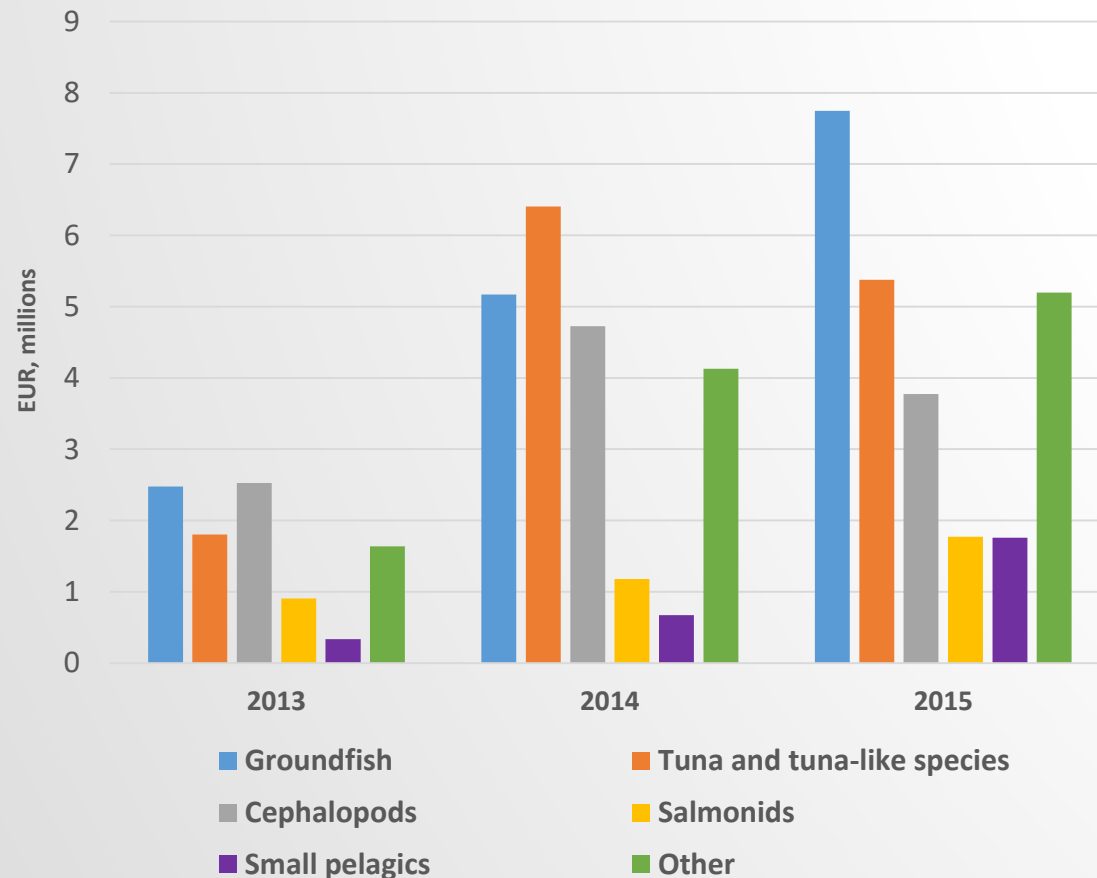
- Crustaceans
- Groundfish
- Crustaceans
- Salmonids
- Tuna and tuna-like species
- Crustaceans

Source: EUMOFA, 2016

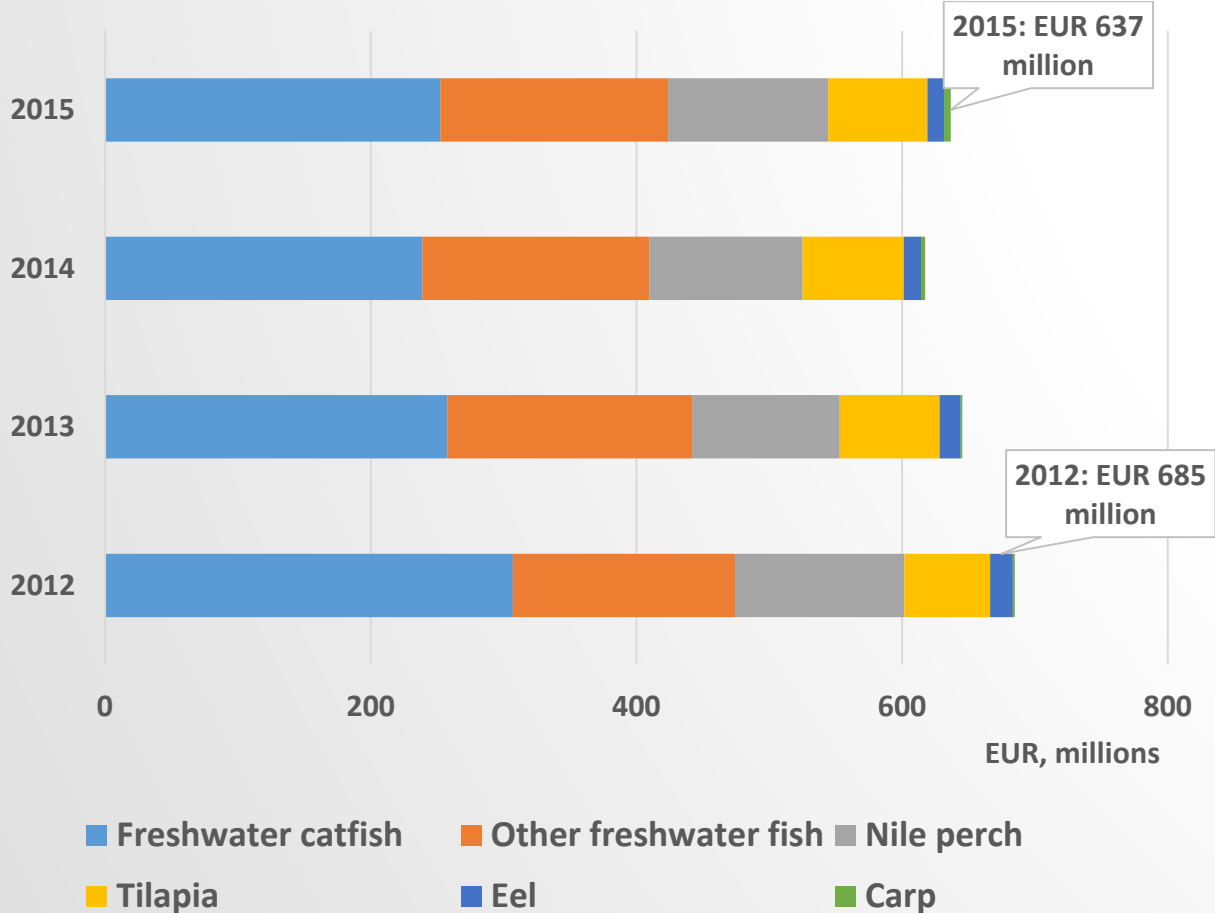
CROATIAN EXTRA-EU IMPORTS BY COMMODITY GROUPS AND MARKETS

In 2013-2015, the value of **Croatian Extra-EU imports** increased from EUR 9.7 million to EUR 25.6 million.

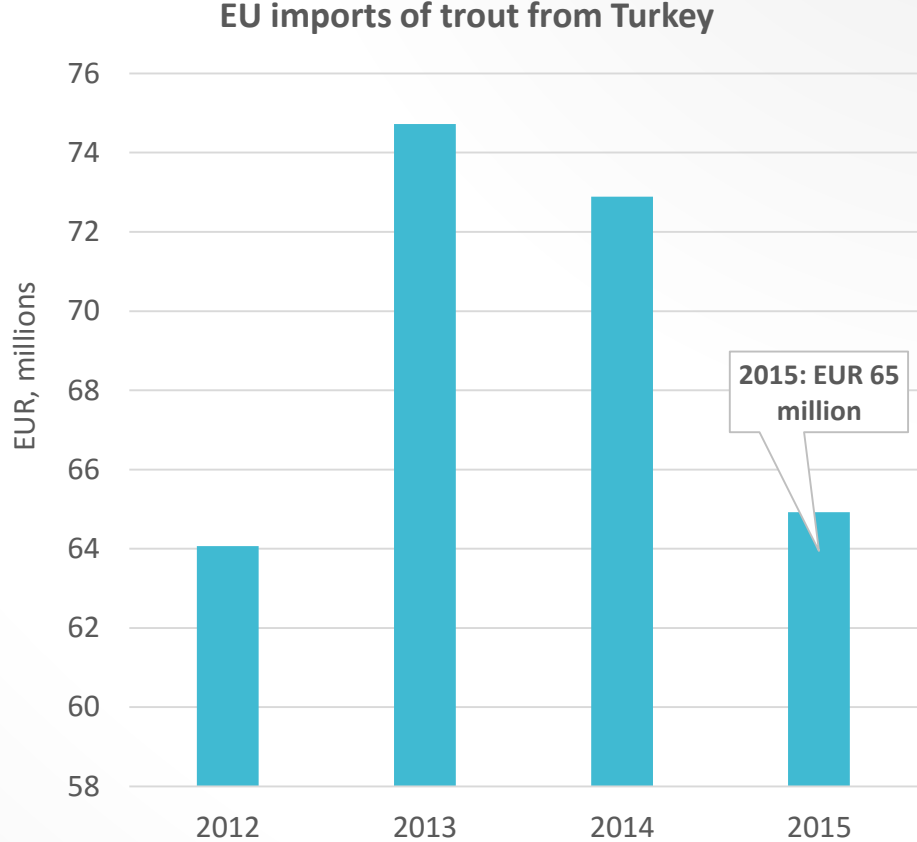
Imports of **Groundfish species** increased most to EUR 7.7 million (+208%).



EXTRA-EU IMPORTS OF FRESHWATER FISH

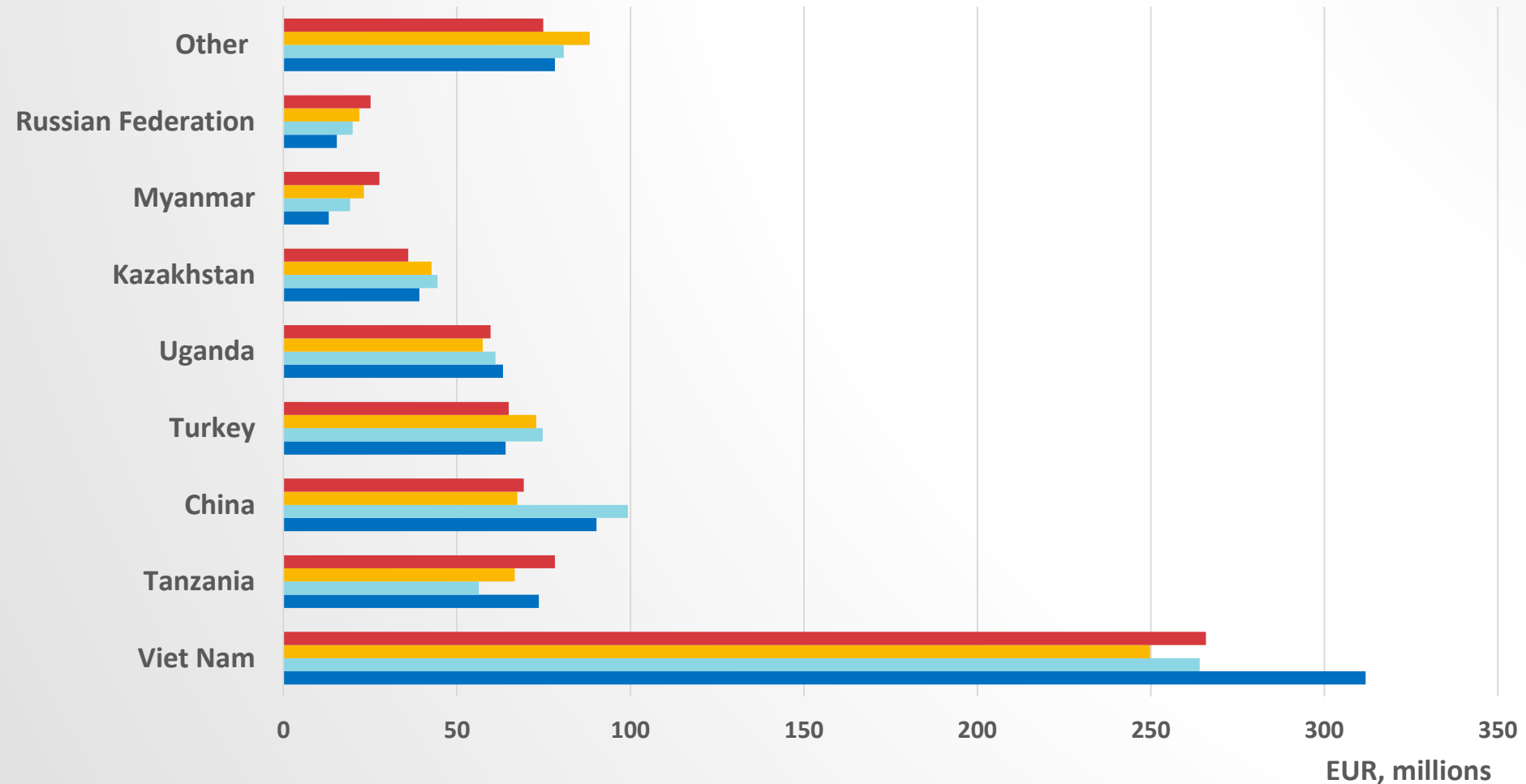


Source: EUMOFA, 2016



Source: EUMOFA, 2016

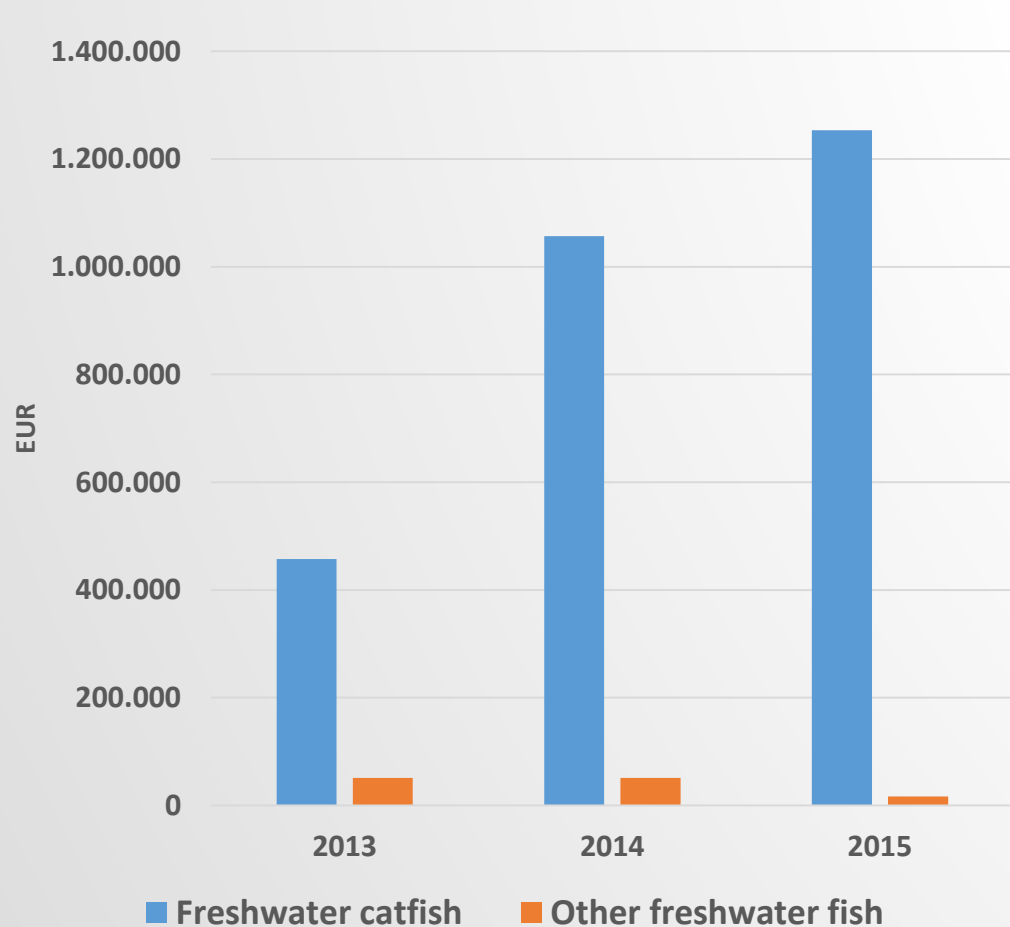
EXTRA-EU IMPORTS OF FRESHWATER FISH



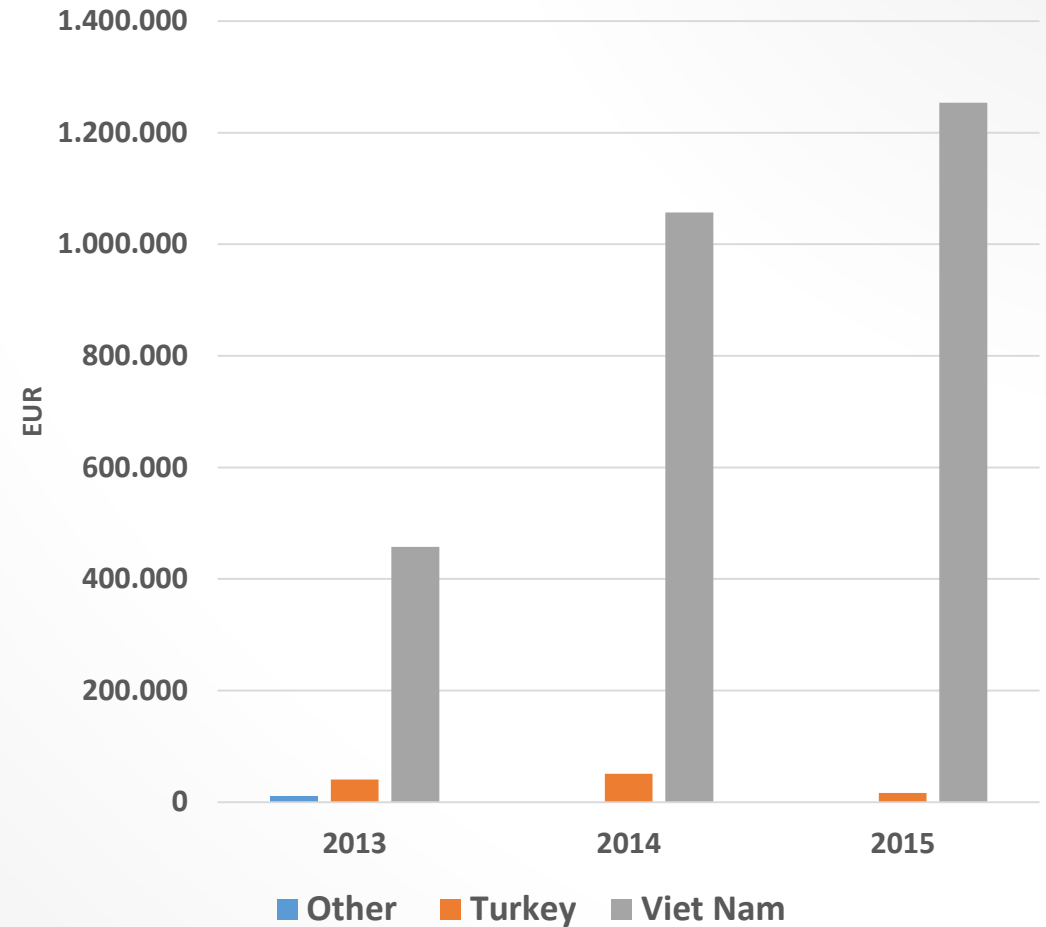
Source: EUMOFA, 2016

■ 2015 ■ 2014 ■ 2013 ■ 2012

CROATIAN EXTRA-EU IMPORTS OF FRESHWATER FISH

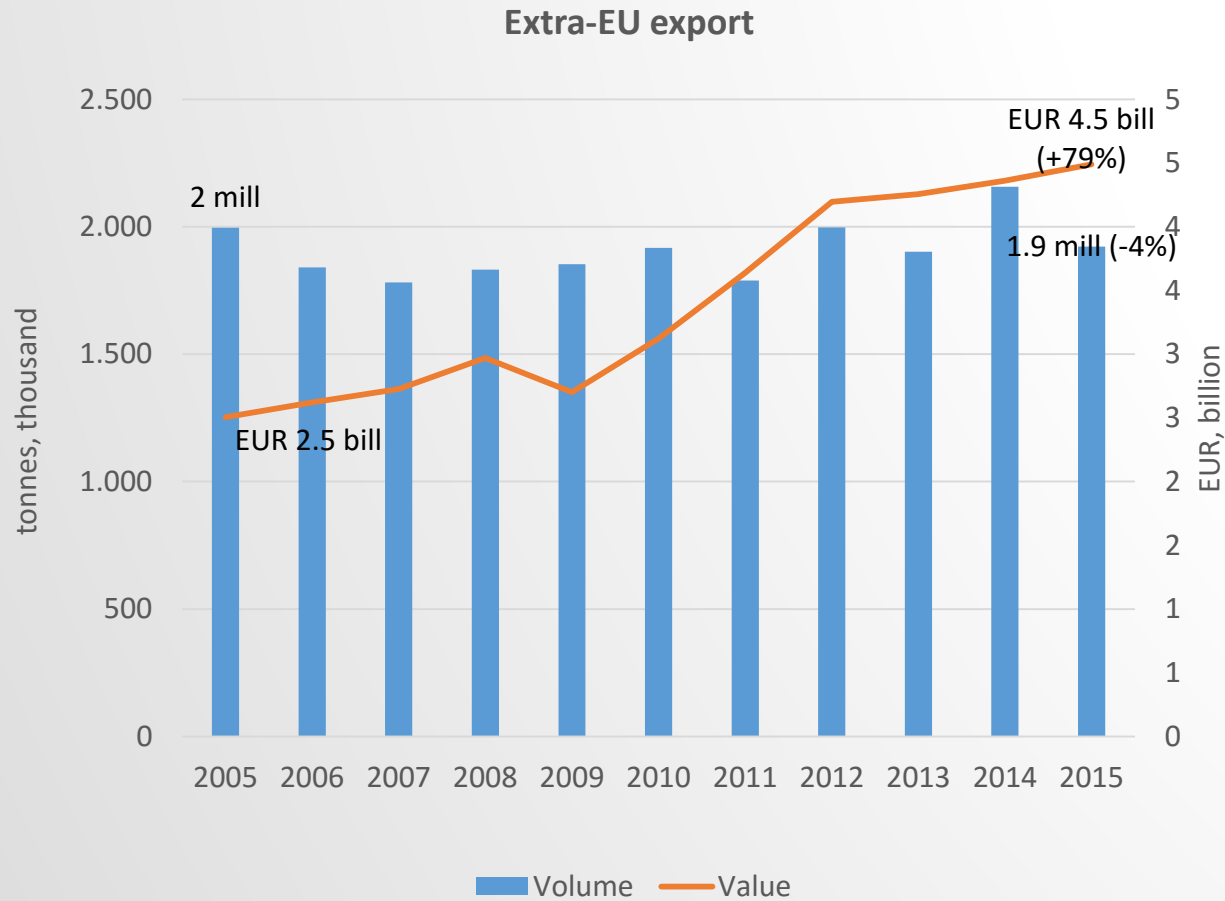


Source: EUMOFA, 2016

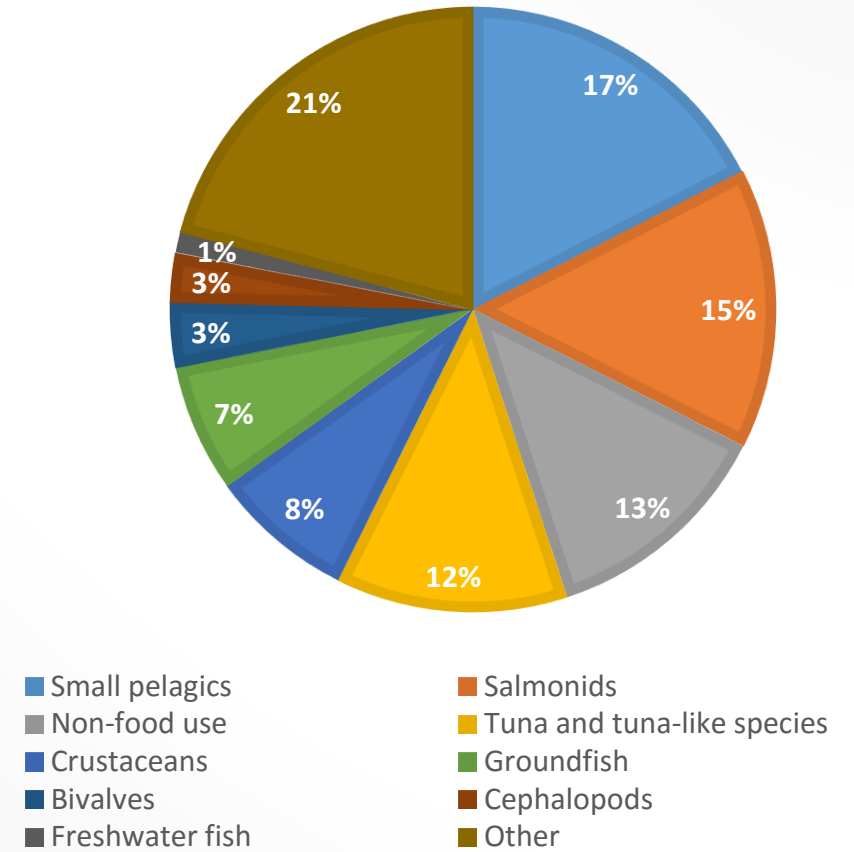


Source: EUMOFA, 2016

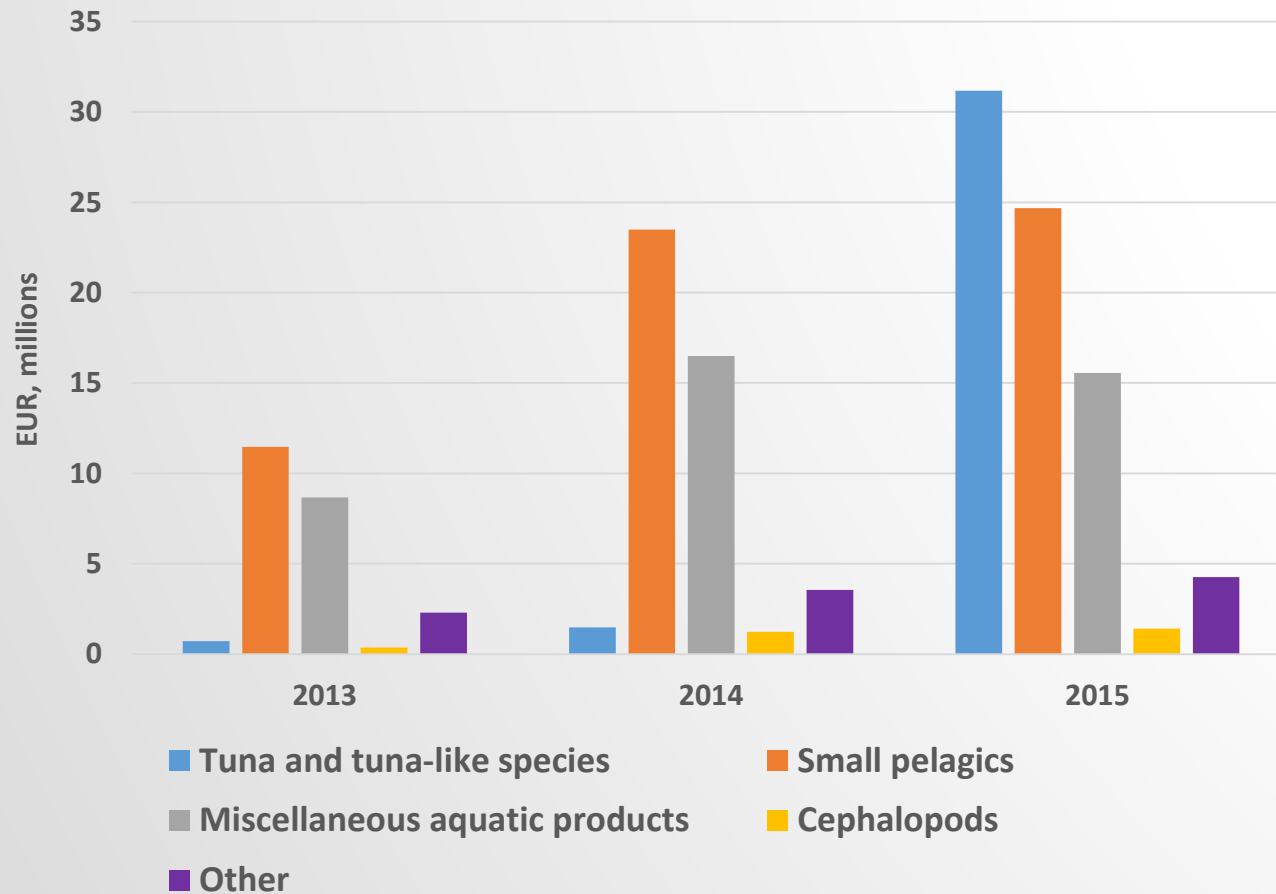
EXTRA-EU EXPORTS



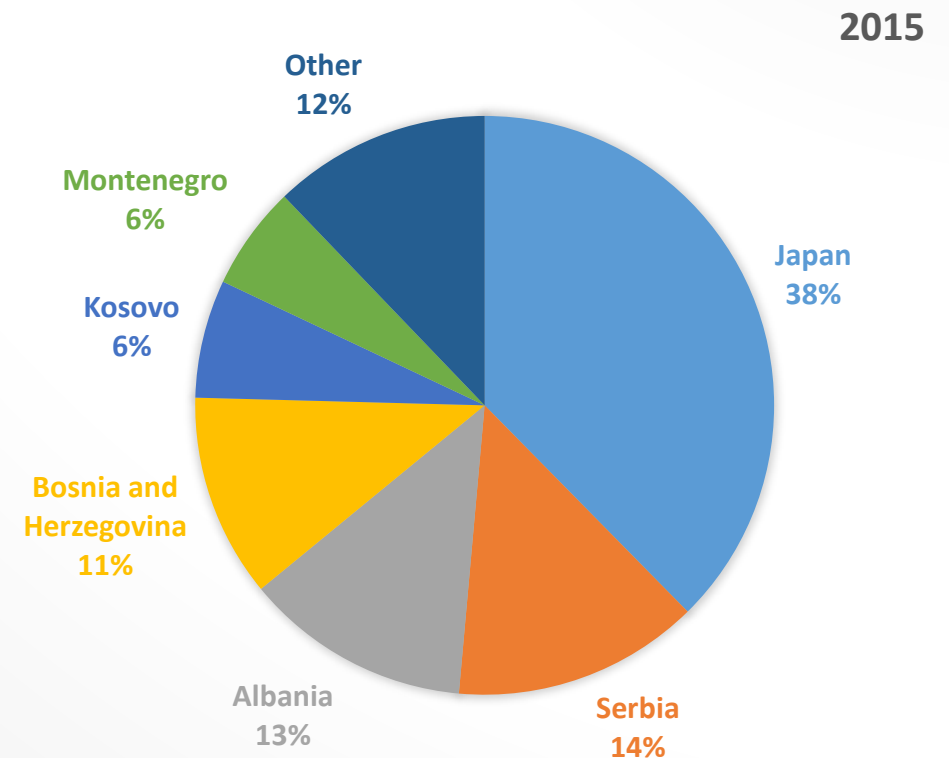
Extra-EU exports by main commodity groups by value (2015)



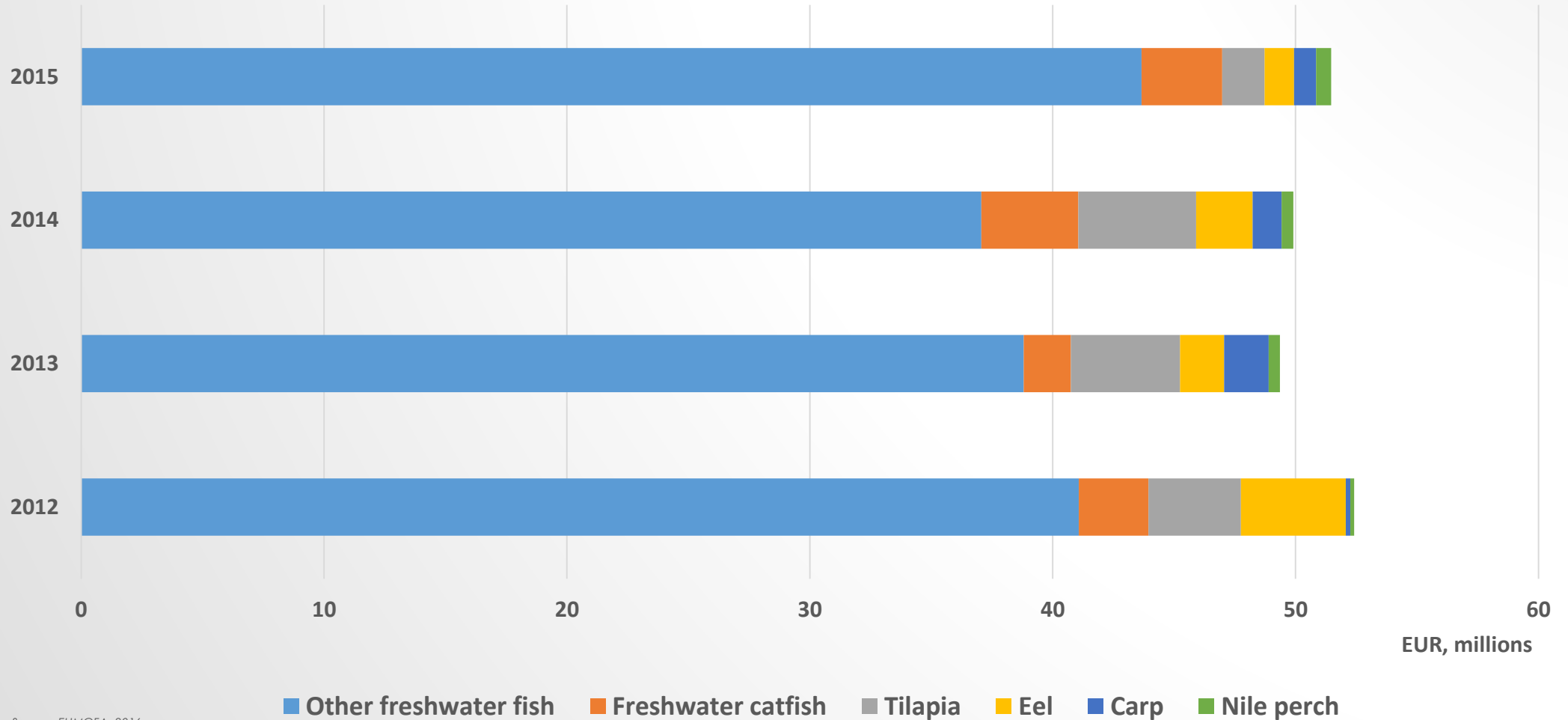
CROATIAN EXTRA-EU EXPORT BY COMMODITY GROUPS AND MARKETS



In 2013-2015, the value of **Croatian Extra-EU exports** increased from EUR 23.5 million to EUR 146.8 million mostly due to the booming exports of **tuna and tuna-like species**.

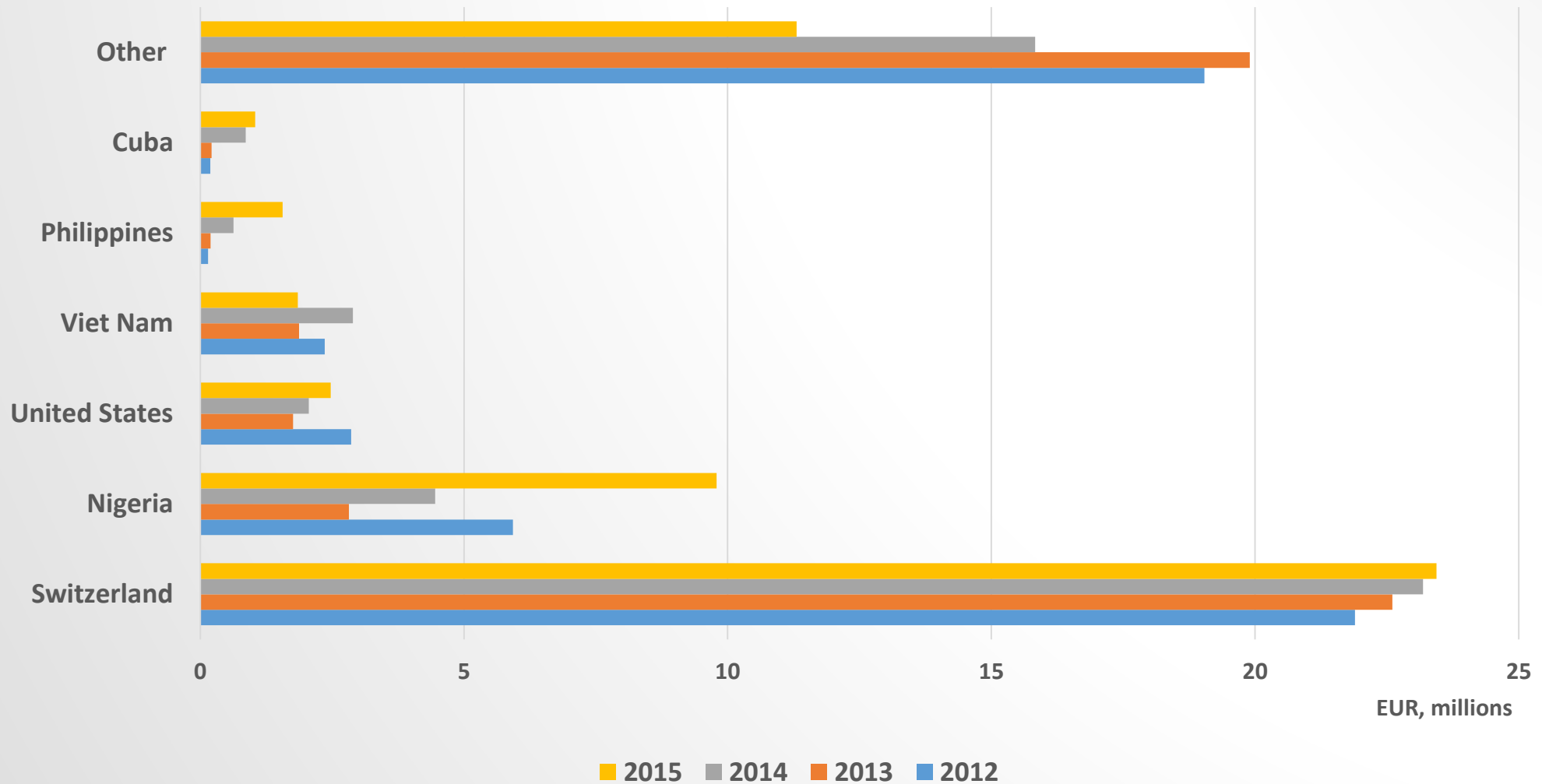


EXTRA-EU EXPORTS OF FRESHWATER FISH



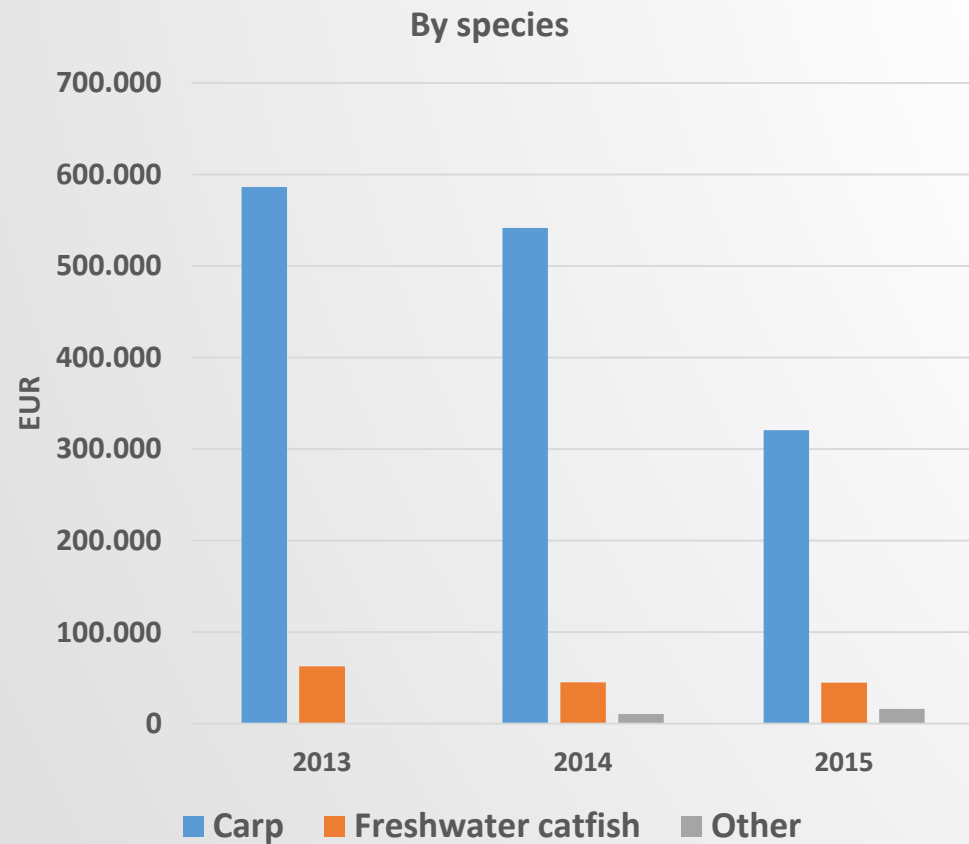
Source: EUMOFA, 2016

EXTRA-EU EXPORTS OF FRESHWATER FISH

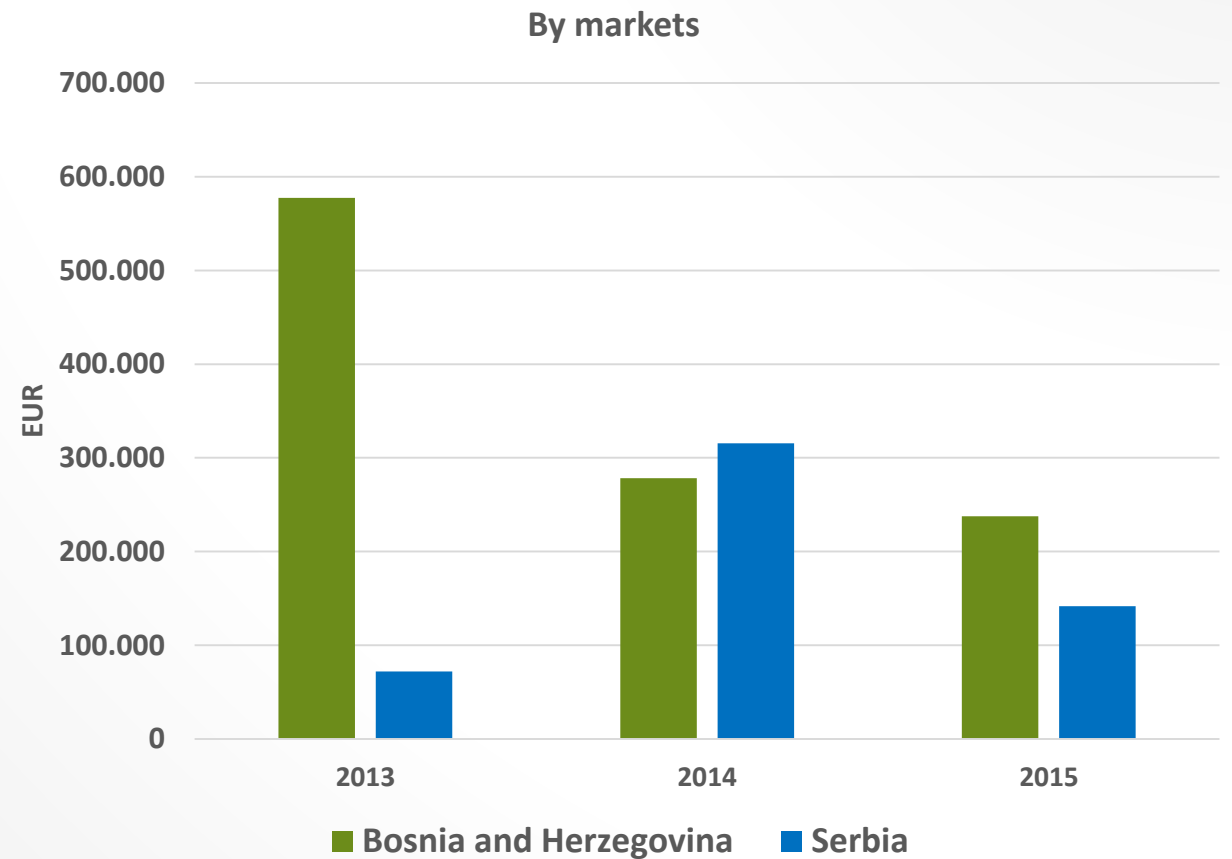


Source: EUMOFA, 2016

CROATIAN EXTRA-EU EXPORTS OF FRESHWATER FISH

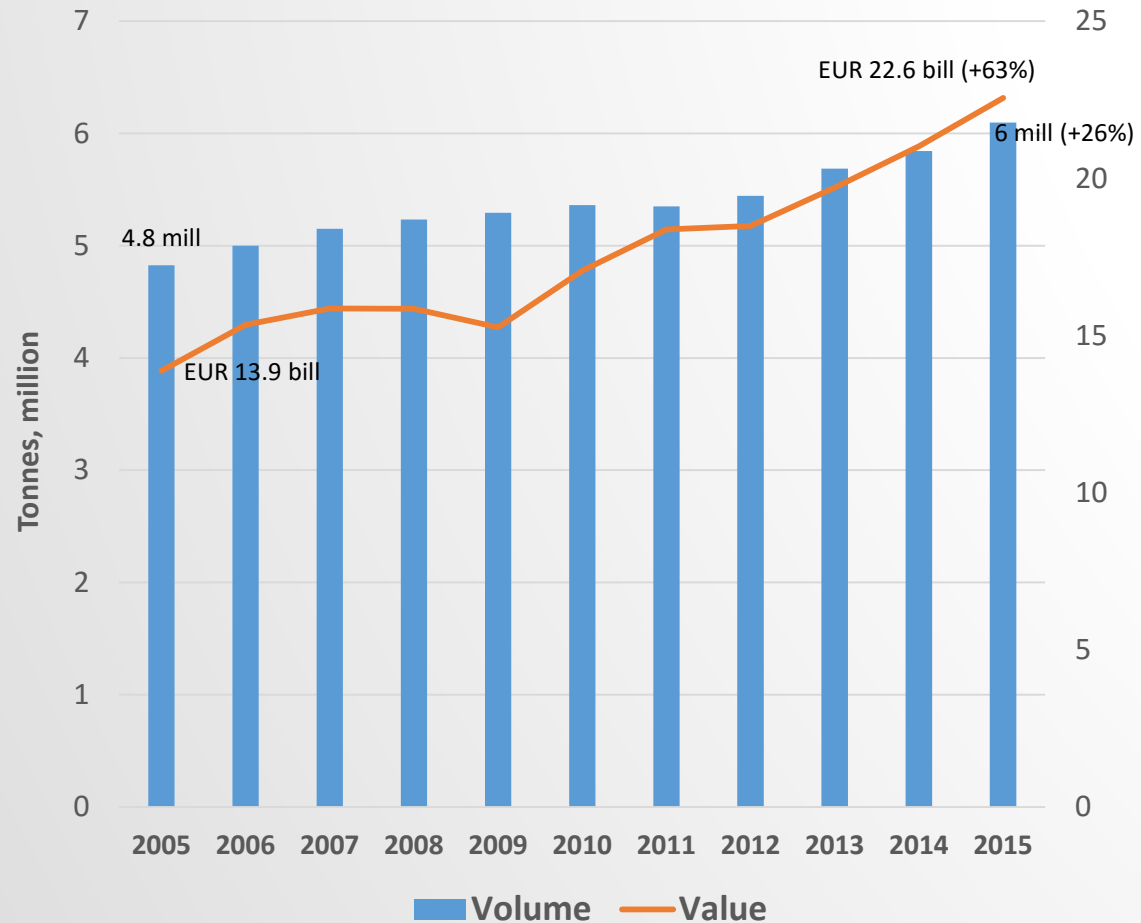


Source: EUMOFA, 2016

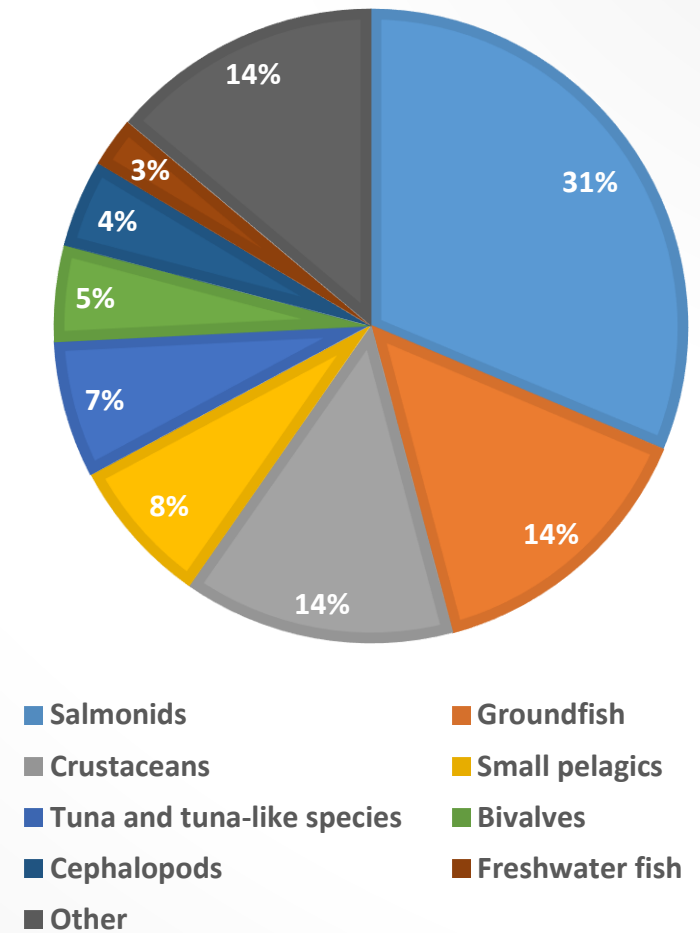


Source: EUMOFA, 2016

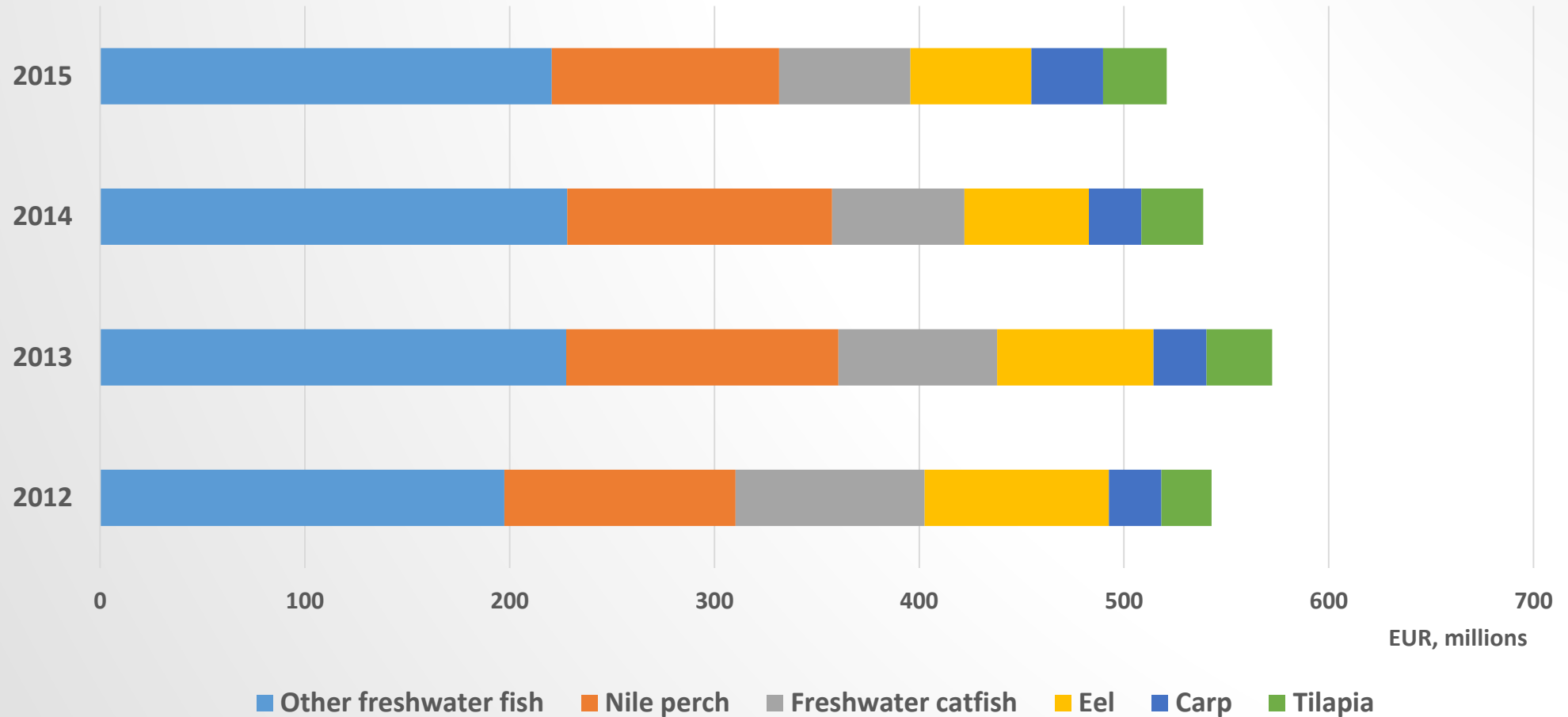
INTRA-EU EXPORTS



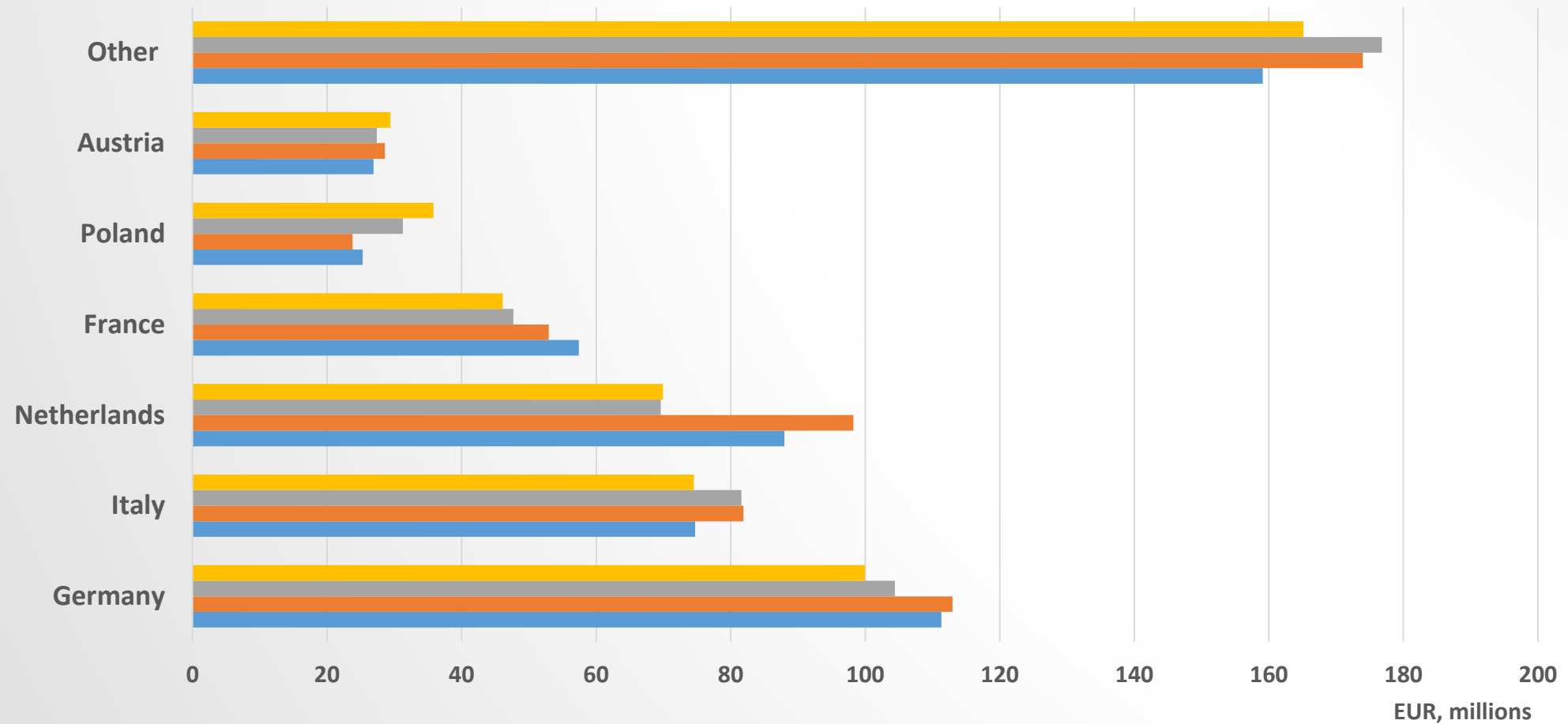
Intra-EU exports by commodity groups in value (2015)



INTRA-EU EXPORTS OF FRESHWATER FISH



INTRA-EU EXPORTS OF FRESHWATER FISH

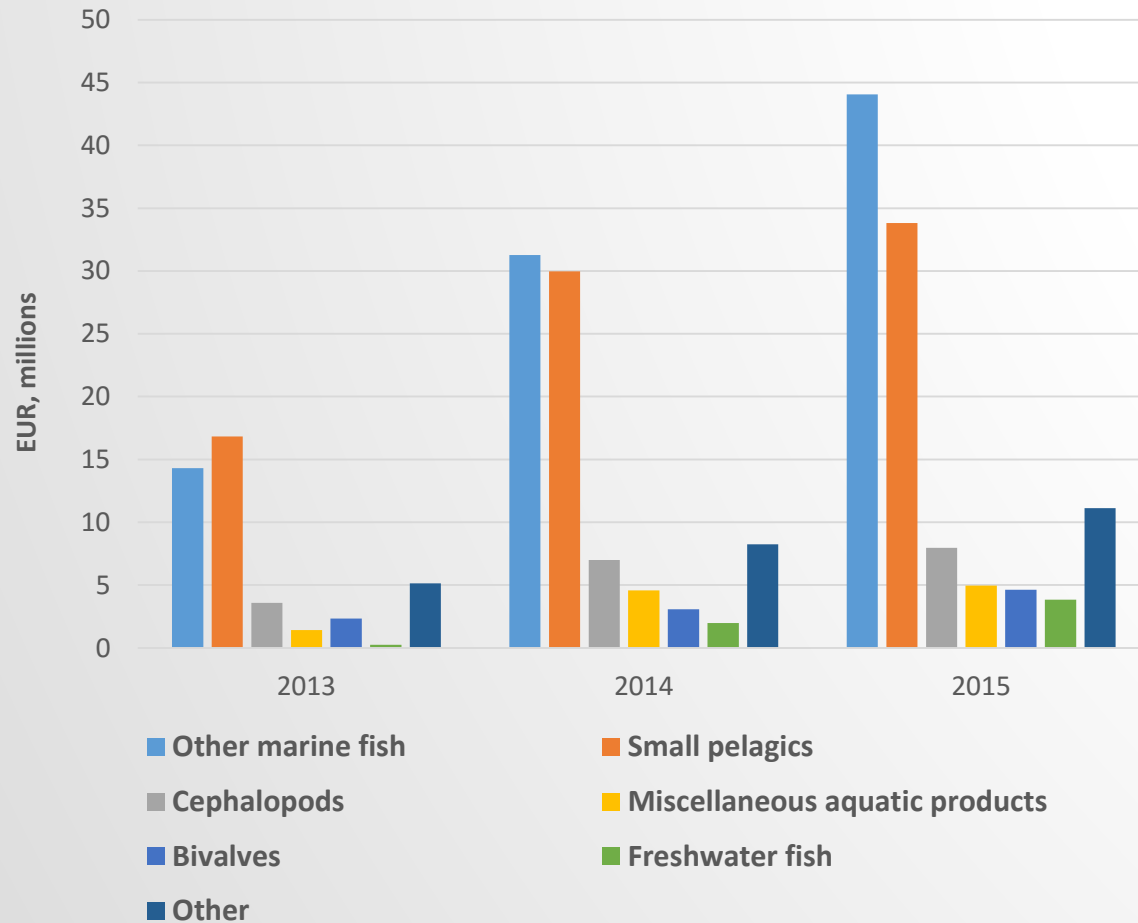


Source: EUMOFA, 2016

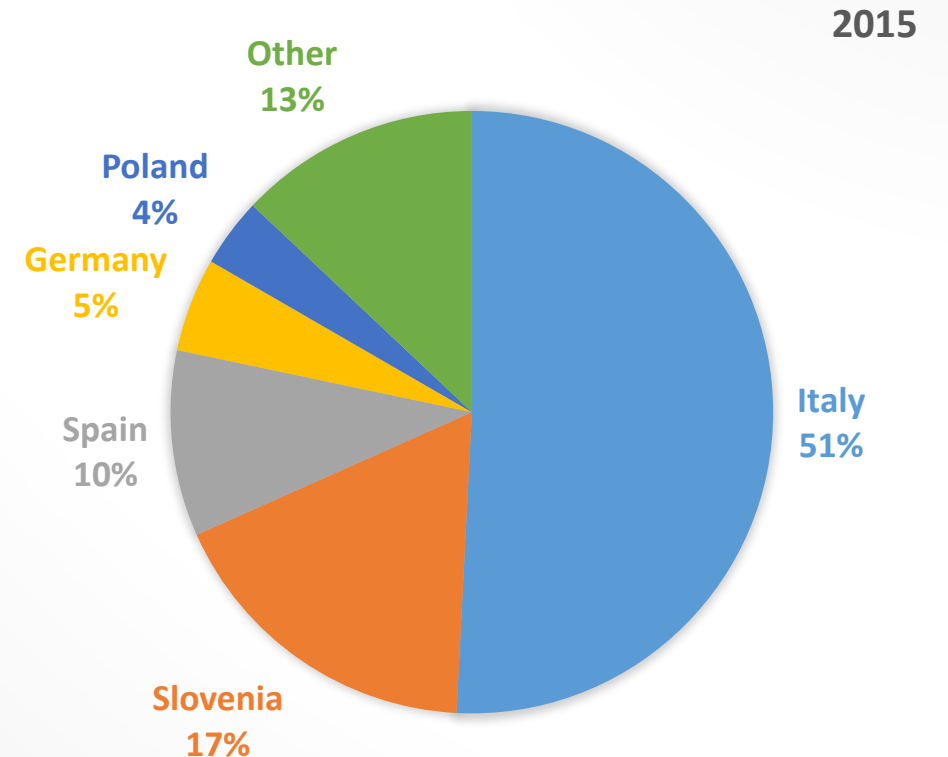
■ 2015 ■ 2014 ■ 2013 ■ 2012

CROATIA – INTRA-EU EXPORTS

By commodity groups

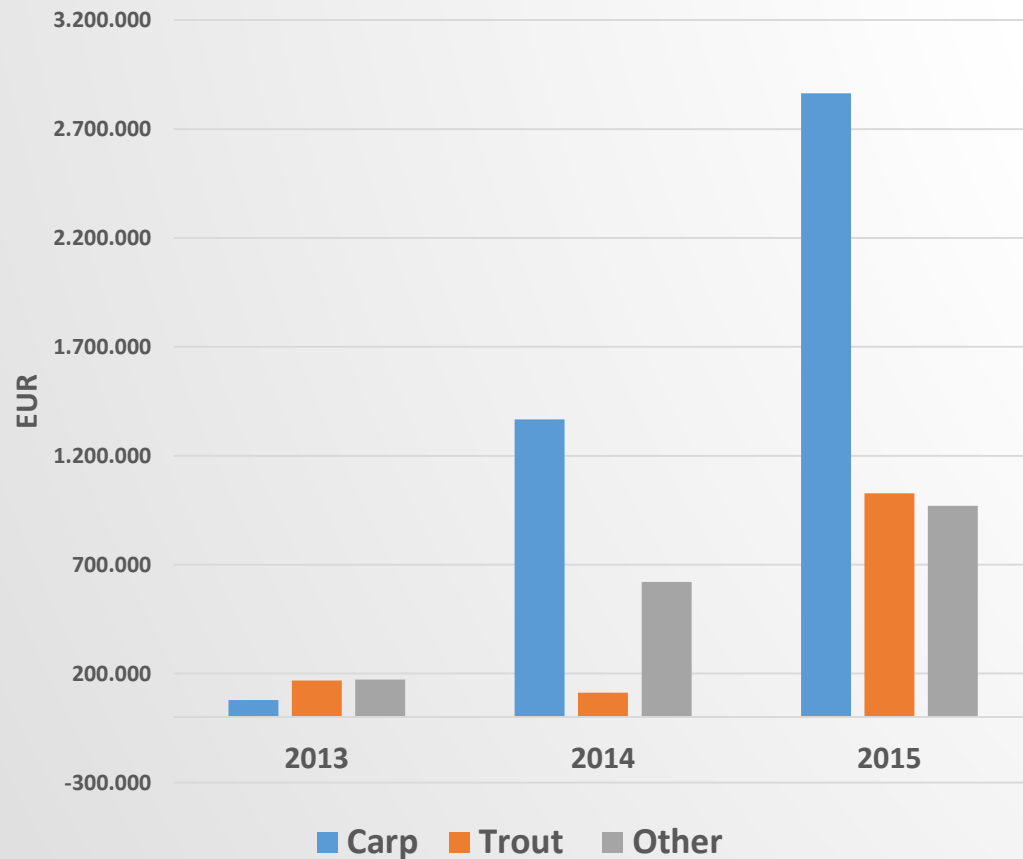


In 2013-2015, the value of **Croatian Intra-EU exports** increased from EUR 43.8 million to EUR 110.4 million.

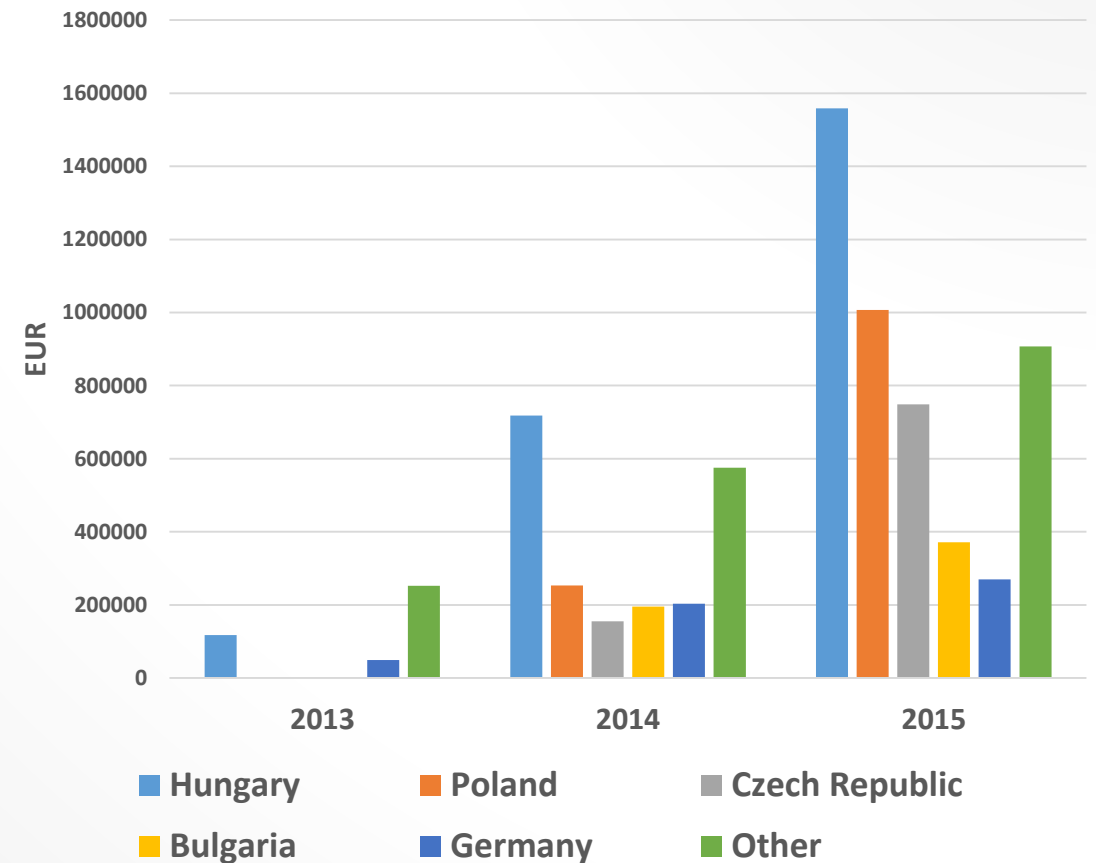


CROATIAN INTRA-EU EXPORTS OF FRESHWATER FISH

By species



By countries



GLOBAL CONSUMER TRENDS - 2016



GREENER AND HEALTHIER FOOD

- **Greener food**, “eco” is the new reality;
- Higher consumer demand for **natural** and “**less processed**” food;
- **Local** and **seasonal** food – “Km zero”;
- Growing **popularity** of the plant-based diets, in particular, Mediterranean diet due to the rise of Mediterranean-inspired products in the retail, menu-options in the Ho-Re-Ca sector, and its attractiveness compared to restrictive fat diets.



CHANGE MAKERS

- Consumers focus on creating a **lifestyle** rather than products alone;
- **Sustainability** evolves from being good to a **necessary part** of the product development;
- **Food waste** - creative ways of supporting sustainable produce and consumption



Source: Wefood

BUYING TIME

- **Online shipping, apps and delivery services** are transforming consumer access to deals, niche offering and complete meals;
- **Innovations** encourage consumers to think outside traditional physical retailers;
- The **delivery revolution** in the food service and Ho-Re-Ca sector – order and pay apps and third party online orders.



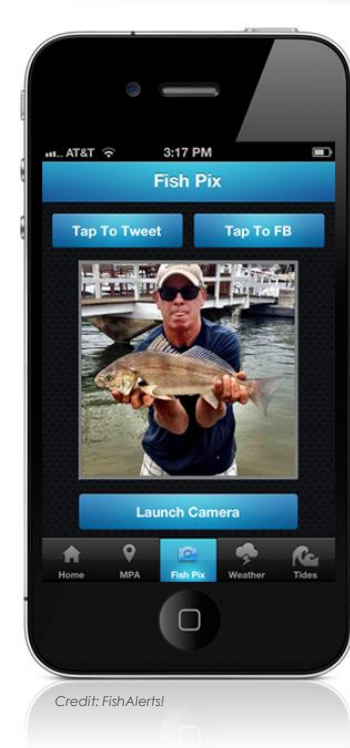
Source: Greenlandfood



Source: Skagenfood

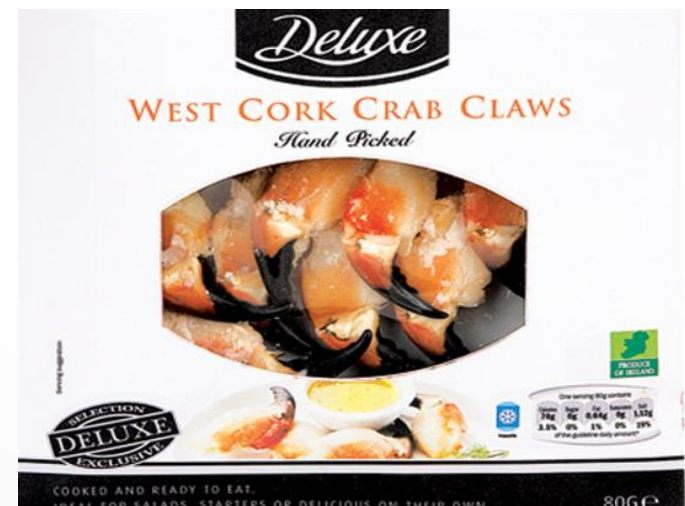
OVER-CONNECTED CONSUMERS

- Almost **79%** of the EU population are estimated as **internet users** (per November 2015, Eurostat);
- 50% used internet away from home or work using mobile phone networks or wireless connection;
- Several researches show that more consumers will use **technology to improve their diet** in 2016, tracking their food intake or activities with smartphone apps.
- **Digital breaks?**



FREE THINKING CONSUMERS

- Consumers are searching for **innovative routes** to product value and uniqueness;
- Higher consumer spending on products which **inspire** them, yet, significant **discounts** are expected;
- The market share of discounters in the EU keeps strong, although the growth is slowing down because of higher consumer focus on **variety and premium qualities** of products.



CHALLENGING MATURE LIFESTYLE

- Growing consumer segment - **senior consumers** (65+) focused on **health, quality** and **wellbeing**;
- The share of senior population in the EU-28 is projected **to increase** from 18.5% in 2014 to 28.7% by 2080 (additional 55.2 million senior persons, *Eurostat*),
- **High/highest fish consumption** by this consumer group on many EU markets.



Source: Eurofish – Fish Day in Copenhagen

Thank you for your attention!