

The European market potential for reef fish

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Fish consumption in Europe keeps growing. Yearly, over 12.5 billion kilogrammes of seafood is consumed. Though not the biggest of Europe's seafood markets, reef fish have their place. Reef fish, like snappers, groupers and parrotfish, live in or close to coral reefs. Due to their appearance, reef fish are often used whole fresh, as an eyecatcher in shop windows in Europe. The European reef fish market is niche, but it is biggest in Southern Europe. Fish consumption there is much higher than the European average and there is potential for growth.

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1. Product description

This factsheet looks at three groups of reef fish that are relevant for the European market: snapper, grouper and parrotfish. These species do not have their own Harmonised System codes, which make them hard to track as there is little trade data available.

All of these fish are exported to Europe under the general HS codes:

- HS 03028990 Fresh or chilled, other fish, excluding fillets, livers, roes and other fish meat
- HS 03038990 Frozen, other fish, excluding fillets, livers, roes and other fish meat
- HS 03044990 Fresh or chilled fillets of other fish
- HS 03048990 Frozen fillets of other fish

Snappers (Lutjanidae)

Image 1: Snapper

Image source: Shutterstock

Worldwide, over 65 Lutjanid species are present. Lutjanid snappers are found in tropical and subtropical marine waters.

Although snappers are seldom the main focus of major commercial fisheries, they are an important component of the local artisanal catch throughout their geographical range. Commercially interesting snapper live alone and therefore are not caught in huge quantities. A variety of capture methods are used to catch snappers, including handlines and various types of nets and trawling gear.

Because of the widespread distribution through numerous national boundaries, and the largely artisanal nature of the fisheries, there are limited catch statistics available for snappers. Worldwide, around 585,000 tonnes of

caught snappers were registered, mainly mentioned as *Lutjanus* spp. (439,600 tonnes in 2017) or as *Lutjanidae* (84,500 tonnes in 2017).

A commercially interesting group of snappers for Europe is the red snapper. There are several snapper species sold as red snapper. Important snapper species sold as red snapper in the European Union are *Lutjanus malabaricus*, *Lutjanus campechanus*, *Lutjanus purpureus* and *Lutjanus sebae*.

Groupers (Epinephelinae)

Image 2: Grouper

Image source: Shutterstock

The subfamily Epinephelinae has over 159 species of marine grouper worldwide. Epinephelus groupers are found in tropical and subtropical marine waters.

Groupers are an important component of the artisanal fisheries and are among the highest priced species in fish markets. Most of the groupers are solitary fish, cruising the reefs and shallows for their prey. Like snappers, a variety of capture methods are used to catch groupers including handline, nets and trawling gear.

Although groupers are one of the most expensive reef fishes, separate catch statistics are not reported for most of the species. The difficulty of identifying many of the species, as they often look similar and can be found in the same waters, is an important reason why there is lack of species-specific catch data.

Worldwide, around 317,000 tonnes of caught groupers were registered, mainly mentioned as *Epinephelus* spp. (213,700 tonnes in 2017).

Parrotfish (Scaridae)

Image 3: Parrotfish

Image source: Shutterstock

With a range of different colours, parrotfish are reef fish known to stand out and be very attractive. Parrotfish have over 95 fish species worldwide, many of which can be found in the Indo-Pacific region.

Parrotfish are less important for commercial fisheries than snappers and groupers. The same fishing methods are used for parrotfish as for other reef fishes.

According to the Food and Agriculture Organisation (FAO) of the United Nations, around 6,000 tonnes of caught parrotfish were registered. Parrotfish are usually sold under a general group, *Scarus* spp.

Tip:

Learn country-specific labelling laws. For the European Union it is important to put the right commercial and scientific name of your product on the product label and between European Union member states there are differences. For example, grouper is labelled as a general group (Grouper - *Epinephelus* spp.) in Germany and the Netherlands but in France you need to label the grouper with its specific commercial and scientific name (Mérou loutre - *Epinephelus tauvina*). On the European Union [website](#) you can find what commercial designation are recognised in the different European member states.

2. What makes Europe an interesting market for reef fish?

Europe has a huge market for fish and seafood. While reef fish species are niche products, they have an established market with little competition. A lot of these fish are sourced from developing countries, so by understanding how the market and the supply chain work, you can get your product to the right buyers.

Huge seafood business in Europe

In the European Market Observatory for Fisheries and Aquaculture Products (EUMOFA) report about the European Union fish market, it is established that Europeans have a huge appetite for fish. In Europe, total seafood consumption reached 12.69 million tonnes in 2017. This comes down to a seafood consumption of 24.3 kg per capita, making it above the world's average.

The European Union is the largest trader in seafood products worldwide. On its own, domestic supply cannot fulfil consumer demand. The European Union seafood market is highly dependent on imported materials, importing about 60% of the fish and seafood consumed.

[Six of the top ten fish and seafood markets in the world are European countries](#), according to Global Trade Tracker (2019). With imports worth €7.87 billion, Spain is the fourth largest market in the world after the United States, Japan and China. France ranks fifth (€6.5 billion), followed by Italy at sixth place (€6.4 billion), Germany at eighth place (€5.4 billion), Sweden at 9th place (€5 billion) and the United Kingdom at the 10th place (€4.1 billion).

The European Fish and Seafood market is still growing. However, competition for fish worldwide weakens this growth. The market for reef fish in Europe seems to be stable or slightly increasing, but accounts for only a small part of total Fish and Seafood consumption (about 1%). Read the CBI Fish and Seafood Market Statistics and Outlook Study to [learn more about the consumption, demand and imports of the European market](#).

Colonial heritage responsible for high demand of ethnic food products in Europe

Reef fish are popular within ethnic populations in Europe, who have them at home as domestic products, and who have cuisines that are built around cooking them. Colonial heritage determines the size of ethnic populations in Europe, and therefore there are large markets for ethnic foods in countries like the United Kingdom, France, Germany, Italy and the Netherlands. As ethnic minority groups grow and the European markets become more accustomed to foods consumed by these minority groups, the market for species like reef fish also grows.

The Netherlands has a relatively large number of immigrants from Indonesia. The largest groups of immigrants, however, come from Turkey and Morocco. In the United Kingdom, a large group of South Asians are settled, especially Indians, Pakistani and Bangladeshi. France has a large immigrant population from countries where French is a common language. Italian immigrants mostly come from Morocco, followed by China and the Philippines, and Germany is home to the largest population of Turkish-Europeans.

Europeans getting more familiar with new cuisine types

Within Europe, there is a growing interest in new cuisine types. Different factors have supported that interest, like:

- a growing multicultural society in Europe;
- growth in international travel;
- visibility of international cuisine types in foodservice and media.

Due to this growing interest in new cuisine types, more and more costumers not only visit mainstream markets but also alternative markets, like ethnic markets. In these alternative markets, reef fish are often part of the segment. These new customers create new opportunities for selling fish by increasing the market for these species that are not traditionally a part of European cuisine.

Tip:

Offer recipes with your reef fish products. New potential customers are not always familiar with how to prepare a dish with reef fish and recipes might make it easier for them to buy and try your product.

Read our article about ethnic supermarkets in Europe and [find more information about this market](#).

3. Which European countries offer most opportunities for reef fish?

European countries are interesting destinations for reef fish. North-Western Europe has huge ethnic populations, while Southern European countries are interesting because their seafood consumption is large, and consumers are more familiar with non-common fish species like reef fish. Reef fish has the potential to grow in all countries, however it is still a niche market product for Europe. The growth is hereby expected to be minimal and mostly revolved around ethnic populations and their food.

United Kingdom has a huge ethnic population

In the United Kingdom, around six million inhabitants are from Asian, African or Arab ethnic groups. Therefore, a lot of ethnic markets and stores are there to provide these groups with their preferred fish. In general, immigrant populations tend to be located in the larger cities and urban areas within the United Kingdom. The cities within the United Kingdom with the highest concentration of ethnic populations are London, Birmingham, Leicester and Manchester.

Most of the time fish are sold whole Individual Quick Frozen (IQF) to the end-consumers. However, fresh whole reef fish and frozen fillets or triangles are also sold regularly.

Tip:

Be informed about trade news updates, particularly about Brexit via updates from the British government. As the United Kingdom mostly imports from neighbouring European countries, imports may be affected if the country leaves the European Union. This may be a good opportunity to start contacting British traders and importers to sell your product, directly.

Ethnic population in other countries in North-West Europe are huge too

Not only the United Kingdom has a huge ethnic population, other countries in North-West Europe – like France, Belgium, the Netherlands and Germany – also have high numbers of Asian, African or Arab inhabitants. In these countries, ethnic minority groups are concentrated around the urban areas, by countries:

- France: Paris, Lyon and Marseille

- Belgium: Brussels and Antwerp
- Netherlands: Amsterdam, Rotterdam and The Hague
- Germany: Berlin, Hamburg and Munich

A growing amount of ethnic (super)markets are found in the city centres, where reef fish are sold regularly.

Tips:

Visit websites of different ethnic shops in European countries to get familiar with the fish products sold by these shops. Examples of ethnic shops are [Angkor-store](#) in France and [DS-Asian Supermarkt](#) in Germany and the [Amazing Oriental](#) chain in the Netherlands.

Brand recognition in the chest freezers in ethnic food stores is rather limited. The development of a unique branding concept for your product range will certainly offer opportunities in the European market.

Check these Dutch importers if you want to export reef fish into the Netherlands: [Mooijer Volendam B.V.](#), [Amacore B.V.](#), [Open Seas B.V.](#), [Hoogendijk Import Export B.V.](#) or [Bonesca](#).

Use [Google Translate](#) if you are trying to access a company website linked in this study and the website is not available in a language you are familiar with. Companies that you might be interested in may only have their websites translated into the languages that they use most often.

Switzerland and Austria love to eat snapper in restaurants

In Switzerland and Austria, red snapper is regularly eaten in restaurants. It is not the whole fish that are consumed in the restaurants, but mainly the fillets (170-220 grams). The fillets are imported frozen by companies throughout Europe and sold to wholesalers for distribution to Swiss and Austrian restaurants.

Tip:

Try to sell fillets with an optimal size of 170-220 grams, instead of portion cuts, if you want to attract buyers who serve the food service industry in North-Western Europe. This is the size range and presentation that their customers, and therefore them, will be most interested. Southern European buyers are more likely to buy and eat whole fish, both at home and in restaurants.

Portugal and Spain: the biggest European seafood consumers

As mentioned before the European Union per capita consumption of seafood is 24.3 kilograms, which is above world average. Within the European Union, consumption patterns differ. Portugal and Spain stand out as eating much more seafood than the rest of Europe, and other countries in the Southern Europe also eat more seafood than the European average.

In Portugal, the per capita consumption grew to 56.8 kilograms in 2017. For Spain, this volume reached 46.5 kilograms in the same year.

Portugal and Spain are not only familiar with eating seafood but are – like the other Southern European countries – particularly used to eating reef fish originating from the Mediterranean Sea. Fish are sold on local markets or the bigger city markets, and wholesale.

In Southern European countries, reef fish like grouper and snapper are regularly chopped into pieces and used in a soup, stew, or pasta sauce. However, whole fish are also eaten grilled or baked in the oven.

As reef fish are a part of the traditional diets in Portugal and Spain, unlike in North-Western Europe, the fish are sold in mainstream markets, rather than just the ethnic or food service industries. This provides you with additional opportunity if you can gain market access, but you will also be competing against the local industry.

Tips:

Find more information about EU seafood consumption in the [EU Fish Market 2019 report](#) published by EUMOFA.

If you are looking to do business with Spain, check out the website of the largest association for fish of this country, [Conxemar](#).

4. What trends offer opportunities on the European reef fish market?

It is important to understand the trends that affect the markets of your products. The trends supply you with an understanding of what the market wants and give you some insight into things that the market finds important. Some of these may end up being a mandatory requirement or license to do business. Here are some of the trends that have significant influence on your products' market access in Europe, now and in the future: fish health benefits, growing immigration, mislabelling and the consumer's perspective on frozen fish.

The European consumer market is increasingly health-focused

Several studies around the world show that [Omega 3 helps reduce the risk of heart disease and diabetes](#). Fish, including reef fish, are full of this heart-protective fat, which decreases blood pressure, increases the concentrations of good cholesterol and prevents blood clots. In Europe, people are more and more likely to know about these benefits and seafood's popularity is increasing as a result.

For you as an exporter, particularly if you are producing retail-ready or other consumer-facing products, by having the health benefits of your product visible on your packaging and in your online and offline communications, you can make your product more appealing to an increasingly health-focused European consumer market.

Tips:

Include the health benefits of eating fish with your product to make it more attractive to buyers.

Read more about Omega 3 in the journals of [the American Heart Association](#), [the American college of cardiology](#) and [Elsevier](#) to get familiar with the benefits of this fatty acid.

Frozen fish gains market share

The Southern European countries are known for their huge consumption of fresh fish, while Northern European markets usually want processed fish. However, [Spanish and Italian buyers are also now shifting to importing](#)

frozen fish. Seafood is an important part of the diet of the European population. While fresh products still dominate the market, particularly in Southern Europe, frozen products have also been performing well.

Let us take a look at Spain, for example. According to the Trade Commissioner service in Spain, one good reason for the excellent performance of frozen products is a Spanish regulation ([REAL DECRETO 1420/06, de 1 de diciembre](#)) that dictates that any fish served raw or almost raw (smoked, marinated, etc.) has to be frozen for at least 24 hours before being served, meaning that if imported frozen, that condition is already met.

Frozen filleted fish are also more convenient and easier to handle and prepare than whole fresh fish.

Tip:

Look at [the website of Intan Seafood](#). This is an Indonesian company that markets their fish products, which include reef fish, based on their health benefits. This is a good example of a company that successfully targets the European market, advertising health benefits, and exports much frozen fish, profiting from the increased market share.

Growing immigration increases demand for ethnic food

Immigration rates in Europe are increasing, mostly due to employment opportunities and tourists and students who return to live or stay. Increasing numbers of immigrants increase the demand for typical ethnic food, like reef fish.

At the beginning of 2017, the total migrant population of non-European Union citizens living in the European Union was 22.3 million, representing 4.4% of the European Union population, with an additional 2.4 million arriving through the year. Germany reported the largest number of immigrants (391.5 thousand), followed by the United Kingdom (320.7 thousand), Spain (314.2 thousand), Italy (240 thousand) and France (167.5 thousand). Most of the immigrants can be found in Germany and the United Kingdom.

Tips:

Read this [overview of the past and recent trends regarding migration in the European Union](#), found on the migration data portal. It shows what groups migrated to the European Union and when. In North-Western Europe, this represents a large part of your target market.

Look through the products that [RCG Sea Food Business](#) has on offer to better understand your competitors. This is an originally Turkish company that is based in Senegal and successfully processes and exports reef fish and a range of other fish and seafood products to the European (ethnic) market. They have a wide assortment of products that tap into the different needs of the different immigrant populations.

Increased focus on correct labelling

[Reef fish can be very prone to mislabelling](#), according to a recent seafood fraud report by Oceana. This report shows that “rockfish” or “tilapia” are labelled as snappers. Oceana also claims that this mislabelling, whether it is because of intentional fraud or ignorance, can have an impact on health, the economy and/or the environment.

Europe has strict regulations in terms of mislabelling, so exporters looking to sell their seafood products must comply with these requirements. To learn about labelling requirements, check this [pocket guide to Europe's fish and consumer labels](#).

However, exporters must note that reef fish are traded under several names, making it hard to track in the market. Exporters must be 100% sure of the species being sold and must be transparent at all times regarding the labelling requirements, your reputation in the industry and/or business may depend on it.

Tip:

Make sure that you communicate clearly with the buyer, understand their requirements and label accurately and according to buyer needs and European regulations. Read CBI's Tips for organising your Fish & Seafood exports[BA(1)] to better understand how to become a preferred exporter among your European clients.

The story behind products is increasingly important

Especially in the northern part of Europe, consumers love the story behind their food. More and more products are accompanied with stories about the producer, the production method or the origin of the product, which add value for consumers. For seafood products, stories of the [fishermen and fishing methods](#) used to catch the fish, the [aquaculture method](#) used to produce the seafood product and the area where the [seafood product comes from](#) can all help build trust with the consumer.

You too can add value to your reef fish products by providing more background information. You can provide this information on your website or brochure, and you can also share your story on your consumer packaging.

Tips:

Find inspiration for your fish story at European seafood companies like [Queens](#) and [John West](#) to create your own.


Companies outside the seafood sector could be a good inspiration source for your fish story. Study some companies from other commodities like [eggs](#), [coffee](#) or [cheese](#) to find ideas to optimise your fish story.

Read the CBI Trends study to [learn how the importance of storytelling, and other market trends, can help you to get your product on the European market](#).


The study has been carried out on behalf of CBI by [Seafood Trade Intelligence Portal](#).

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