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Canada

MARKET ACCESS SECRETARIAT
Global Analysis Report

Sector Trend Analysis

Salmon Trends

In the European Union

June 2017

Executive summary

In 2016, eight of the ten largest import markets for salmon products were in the European Union, including the largest, Sweden. Overall, European Union countries imported a grand total of US$8.7 billion in salmon products in 2016, with US$5.9 billion being imported from the world. Most of these imports originated in Norway, which has access to the European common market through treaties with the European Union (Global Trade Tracker, 2017).

When CETA is implemented, EU tariffs on all Canadian salmon products will be eliminated. This will make Canadian salmon much more competitive in the EU, and Canadian producers will be well-positioned to expand their market share.

The majority of salmon imported into the European Union in 2016 was Atlantic or Danube salmon (HS code 030214). Atlantic salmon imports have increased over the last five years, while Pacific salmon imports have declined. Other Salmonidae imports have experienced ups and downs in recent years (Global Trade Tracker, 2017).

Total volume sales of fish in the European Union have remained essentially flat over the last five years, falling from 4.52 million tonnes to 4.46 million between 2012 and 2016. Despite experiencing a decline over the last few years, Spain remains the single largest market, followed by the United Kingdom. Hungary represents the fastest growing market, with compound annual growth of 6.12% over this period (Euromonitor International, 2017).

Note: For the purpose of this report "salmon products" were defined as 030213 (Pacific salmon), 030214 (Atlantic and Danube salmon) and 030219 (Salmonidae). HS codes 030212 represents a discontinued code for fresh salmon in general.

The European Union is defined as Austria, Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and the United Kingdom.

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Trade overview

Most European Union (EU) trade is with other EU countries, and most of the rest is with countries that have unique economic arrangements such as Norway and the Faroe Islands. Norway is the primary supplier of salmon products to the European Union. For example, salmon imports to Sweden alone accounted for US$3.3 billion, with 99.9% of that total coming from Norway. Most of the rest was imported from Denmark.

Top 10 markets for salmon imports in the world, US$ million

Rank	Country	2012	2013	2014	2015	2016	CAGR* 2012-16	Market share
World total		**7,771.4**	**10,193.1**	**10,680.2**	**9,471.9**	**11,764.3**	**10.92%**	**-**
1	Sweden	1,866.0	2,591.5	2,791.1	2,639.6	3,281.3	15.16%	27.89%
2	Denmark	655.1	901.1	1,006.7	829.2	1,029.0	11.95%	8.75%
3	United States	634.1	734.3	764.2	800.9	994.9	11.92%	8.46%
4	Poland	554.1	813.6	838.3	731.3	929.2	13.80%	7.90%
5	France	645.2	788.8	756.3	642.2	899.6	8.66%	7.65%
6	Germany	230.8	340.0	444.6	357.0	443.0	17.71%	3.77%
7	Brazil	231.3	368.7	429.4	375.6	438.1	17.31%	3.72%
8	United Kingdom	222.4	397.8	405.2	312.6	424.7	17.55%	3.61%
9	Spain	177.1	220.6	247.2	275.1	355.4	19.02%	3.02%
10	Italy	165.9	233.0	248.3	238.9	332.3	18.98%	2.83%

Top 10 salmon suppliers and their top 3 markets & market share in 2016 US$ million

Rank	Country	Export value	1	2	3
World total		**11,764.3**	**Sweden – 27.89%**	**Denmark – 8.75%**	**United States – 8.46%**
1	Norway	6,619.2	Sweden – 49.54%	Denmark – 14.68%	France – 8.93%
2	Sweden	1,621.5	Poland – 43.53%	Italy – 14.82%	Lithuania – 14.11%
3	Canada	707.3	United States – 87.99%	China – 7.11%	Japan – 2.42%
4	Chile	669.5	Brazil – 65.43%	China – 21.05%	Argentina – 5.55%
5	Faroe Islands	615.7	United Kingdom – 32.60%	Russia – 20.69%	United States – 18.84%
6	United Kingdom	424.9	France – 47.93%	United States – 18.07%	Poland – 7.59%
7	Denmark	417.3	Spain – 24.95%	Germany – 23.00%	Italy – 15.22%
8	United States	102.8	Canada – 99.0%	Italy – 0.30%	Hong Kong – 0.19%
9	Germany	94.5	Lithuania – 40.86%	Poland – 27.11%	United Kingdom – 5.79%
10	France	63.2	Spain – 18.42%	Belgium – 17.21%	United Kingdom – 16.30%

Source for both: Global Trade Tracker, 2017. *__CAGR__ - Compound annual growth rate

Canada's performance

Canada is the third largest supplier of fresh and chilled salmon products in the world, with export sales of US$707 million in 2016. From 2012 to 2016, Canadian salmon exports fell slightly and then increased, such that the net compound annual growth rate for this period was 9.45%. Canada continues to be a net exporter of salmon products, with a trade surplus of US$589 million (Global Trade Tracker, 2017).

Canada's top export markets in 2016 were the United States, with export sales worth US$622 million, China, worth US$50 million, and Japan, worth US$17 million. Exports to the EU totalled US$2.6 million, of which the vast majority (2.5 million) was Pacific salmon. This stands in stark contrast to the international market: Canada exported US$663 million of Atlantic salmon in 2016, and US$44 million of Pacific salmon (Global Trade Tracker, 2017).

Currently, Canadian salmon products face a 2-15% tariff from the European Union, depending on species (Global Affairs Canada, 2016). Canadian producers will thus enjoy a similar relationship to the EU as Norway, Iceland and the Faroe Islands. Atlantic salmon in particular is expected to become much more competitive, and Canadian suppliers will have a net advantage compared to countries with no preferential agreements.

Canada is the twenty-second-largest supplier of fresh salmon products to the European Union, and the fourth-largest non-EU exporter. Only Norway, the Faroe Islands and Iceland exported more fresh and chilled salmon products to the EU in 2016, and each of these countries enjoys particular trade relationships with the EU: Norway and Iceland are part of the European Economic Area, while the Faroe Islands is a dependency of Denmark and therefore able to trade with Denmark's partners. More market opportunities lie in this market as salmon products have been identified as promising sectors for Canadian exporters based on the Market Assessment of Opportunities and Challenges in the EU report.

Top 10 suppliers of salmon products in the world, US$ million

Rank	Country	2012	2013	2014	2015	2016	CAGR* 2012-16	Market share
World total		**7,771.4**	**10,193.1**	**10,680.2**	**9,471.9**	**11,764.3**	**10.92%**	**-**
1	Norway	4,726.4	6,184.2	6,272.8	5,328.5	6,619.2	8.78%	56.27%
2	Sweden	918.2	1,390.5	1,483.5	1,327.1	1,621.5	15.28%	13.78%
3	**Canada**	**492.9**	**471.9**	**413.4**	**538.2**	**707.3**	**9.45%**	**6.01%**
4	Chile	268.2	443.4	567.2	496.2	669.5	25.70%	5.69%
5	Faroe Islands	338.0	504.3	580.0	513.6	615.7	16.17%	5.23%
6	United Kingdom	298.1	419.0	498.5	392.5	424.9	9.26%	3.61%
7	Denmark	174.6	252.0	326.5	323.2	417.3	24.34%	3.55%
8	United States	78.7	86.6	64.9	47.4	102.8	6.89%	0.87%
9	Germany	59.4	68.3	72.6	55.4	94.5	12.30%	0.80%
10	France	31.8	34.9	54.9	55.3	63.2	18.73%	0.54%

Top 5 suppliers of fresh and chilled salmon products to the EU, US$ millions

Rank	Country	2012	2013	2014	2015	2016	CAGR* 2012-15	Market share
Total imports		**3,570.2**	**4,890.9**	**5,230.2**	**4,623.2**	**5,941.6**	**13.58%**	**-**
1	Norway	3,324.4	4,547.5	4,924.7	4,427.4	5,615.5	14.00%	94.51%
2	Faroe Islands	210.4	303.2	261.3	160.9	258.0	5.22%	4.34%
3	Iceland	2.4	2.9	4.3	4.4	19.0	67.52%	0.32%
4	**Canada**	**1.0**	**1.9**	**2.2**	**1.9**	**2.6**	**26.34%**	**0.04%**
5	United States	3.6	2.0	0.7	0.8	0.7	-33.92%	0.01%

Source for both: Global Trade Tracker, 2017.
***CAGR** – Compound annual growth rate

Fresh and chilled salmon supply gap, US$ millions

	2012	2013	2014	2015	2016	CAGR* 2012-16
EU imports from the world	**3,570.2**	**4,890.9**	**5,230.2**	**4,623.2**	**5,941.6**	**13.58%**
EU imports from Canada	1.0	1.9	2.2	1.9	2.6	26.34%
Supply gap	**3,569.2**	**4,889.0**	**5,228.0**	**4,621.3**	**5,939.0**	**13.58%**

Source: Global Trade Tracker, 2017. ***CAGR** – Compound annual growth rate

Consumer and producer trends

Salmon products form a traditional part of many European diets. The majority of salmon consumed in Europe is farmed, and salmon is the most consumed farmed species in the EU as well as the third most consumed fish species overall (EUMOFA, 2016). Per capita consumption in the EU totaled over 2kg per person in 2014.

The EU achieved approximately 18% self-sufficiency in salmon products in 2014, meaning that 82% of demand had to be imported. Trade in salmon and salmonidae was the largest component of inter-EU trade, at 28% in 2015. In total, salmonid trade accounted for 6.4 billion euros. Salmon species alone accounted for 5.7 billion euros (EUMOFA, 2016).

Salmon in the European Union tends to be processed and consumed smoked, with France and Poland both producing large amounts of smoked salmon (EUMOFA, 2016). Nonetheless, fresh salmon is used in a variety of products.

Retail sales

Spain is the leading market for fresh fish and seafood in the EU. However, its market has declined by a compound annual rate of 2.57% since 2012, while the UK's market grew over the same period.

Historic total volume sales in tonnes ('000) of fresh fish and seafood in the European Union by country, '000 tonnes

Country	2012	2013	2014	2015	2016	CAGR* 2012-16	Market share
Spain	1,299.8	1,261.9	1,215.7	1,195.9	1,171.4	-2.57%	20.77%
United Kingdom	681.9	701.4	724.8	739.5	752.2	2.48%	13.34%
Germany	670.6	639.1	682.9	648.6	635.5	-1.34%	11.27%
Italy	531.5	513.4	516.8	501.6	490.2	-2.00%	8.69%
Portugal	501.4	504.1	490.7	481.4	471.9	-1.50%	8.37%
Poland	296.7	303.2	306.7	313.1	323.5	2.19%	5.74%
France	321.7	317.6	317.4	313.8	312.8	-0.70%	5.55%
Netherlands	272.0	271.9	268.9	267.6	260.3	-1.09%	4.62%
Sweden	181.2	186.7	193.6	200.0	204.0	3.01%	3.62%
Belgium	191.5	196.4	194.0	191.2	191.1	-0.05%	3.39%
Greece	153.9	149.9	149.2	150.6	146.4	-1.24%	2.60%
Finland	120.3	120.2	119.0	118.4	115.0	-1.12%	2.04%
Romania	105.4	107.7	108.0	109.7	112.6	1.67%	2.00%
Denmark	86.4	86.5	85.4	85.1	82.9	-1.03%	1.47%
Austria	78.7	80.7	79.3	77.1	77.7	-0.32%	1.38%
Ireland	60.6	62.1	64.0	65.6	66.5	2.35%	1.18%
Czech Republic	55.5	57.0	57.7	59.0	60.9	2.35%	1.08%
Hungary	37.2	44.0	44.4	45.0	46.5	5.74%	0.82%
Bulgaria	27.6	28.1	28.2	28.6	29.4	1.59%	0.52%
Slovakia	19.8	19.9	20.2	20.5	21.3	1.84%	0.38%
Slovenia	20.0	19.5	19.5	19.8	19.4	-0.76%	0.34%
Luxembourg	13.0	13.3	13.6	13.5	13.5	0.95%	0.24%
Cyprus	8.0	8.2	8.1	8.3	8.4	1.23%	0.15%
Lithuania	8.1	7.8	7.8	7.8	7.8	-0.94%	0.14%
Croatia	6.6	6.4	6.4	6.5	6.5	-0.38%	0.12%
Latvia	6.7	6.4	6.4	6.4	6.4	-1.14%	0.11%
Estonia	3.0	2.9	3.0	3.0	3.0	0.00%	0.05%
Malta	2.4	2.5	2.6	2.6	2.7	2.99%	0.05%

Source: Euromonitor, 2017. ***CAGR** – Compound annual growth rate

The total volume of fresh fish and seafood sales in the European Union witnessed a 0.33% compound annual decrease from 2012 to 2016. Through 2021, fish and seafood sales are forecasted to recover, with a CAGR of 0.5% expected (Euromonitor International, 2017). Fish has performed better than crustaceans or molluscs in recent years and will perform better through the end of the forecast period.

Forecast total volume sales in tonnes ('000) of fresh fish and seafood in the European Union by country, '000 tonnes

Country	2017	2018	2019	2020	2021	CAGR* 2017-21	Market share
Spain	1,155.4	1,155.0	1,158.9	1,169.0	1,155.5	0.00%	20.27%
United Kingdom	760.4	767.2	773.7	779.2	783.9	0.76%	13.75%
Germany	626.3	619.5	614.4	610.9	608.7	-0.71%	10.68%
Italy	480.3	476.2	474.3	473.1	474.9	-0.28%	8.33%
Portugal	465.2	466.3	469.6	474.3	466.9	0.09%	8.19%
Poland	336.2	344.7	358.2	369.7	382.2	3.26%	6.70%
France	312.1	311.1	310.1	309.6	309.1	-0.24%	5.42%
Netherlands	256.5	254.1	252.7	251.9	251.9	-0.45%	4.42%
Sweden	207.5	211.3	215.2	218.5	221.7	1.67%	3.89%
Belgium	191.7	191.6	190.6	189.6	189.0	-0.35%	3.32%
Greece	142.6	140.5	139.1	137.9	137.6	-0.89%	2.41%
Finland	113.2	112.0	111.3	111.0	110.9	-0.51%	1.95%
Romania	116.2	118.5	122.4	125.5	128.9	2.63%	2.26%
Denmark	81.6	80.8	80.4	80.2	80.2	-0.43%	1.41%
Austria	78.2	78.3	78.1	77.8	77.6	-0.19%	1.36%
Ireland	67.0	67.3	67.6	67.8	67.9	0.33%	1.19%
Czech Republic	63.3	65.0	67.5	69.7	72.0	3.27%	1.26%
Hungary	48.2	49.3	51.0	52.5	54.1	2.93%	0.95%
Bulgaria	30.3	30.8	31.8	32.6	33.4	2.47%	0.59%
Slovakia	22.1	22.7	23.5	24.2	25.1	3.23%	0.44%
Slovenia	19.0	18.9	18.8	18.7	18.8	-0.26%	0.33%
Luxembourg	13.5	13.5	13.5	13.4	13.9	0.73%	0.24%
Cyprus	8.5	8.6	8.6	8.8	8.0	-1.50%	0.14%
Lithuania	7.9	7.9	8.2	8.3	8.4	1.55%	0.15%
Croatia	6.6	6.6	6.9	7.0	7.1	1.84%	0.12%
Latvia	6.4	6.4	6.6	6.6	6.7	1.15%	0.12%
Estonia	3.0	3.0	3.1	3.1	3.2	1.63%	0.06%
Malta	2.7	2.7	2.7	2.7	2.7	0.00%	0.05%

Historic total volume sales in tonnes ('000) of fresh fish and seafood in the European Union, '000 tonnes

Category	2012	2013	2014	2015	2016	CAGR* 2012-16	Makret share
Fish and Seafood	5,761.5	5,718.8	5,734.3	5,680.2	5,639.8	-0.53%	**-**
Crustaceans	469.9	459.1	457.7	456.9	455.1	-0.80%	8.07%
Fish	4,519.3	4,504.3	4,520.6	4,484.6	4,459.7	-0.33%	79.08%
Molluscs	772.4	755.3	755.9	738.9	724.7	-1.58%	12.85%

Source for both: Euromonitor, 2017. ***CAGR** – Compound annual growth rate

Forecast total volume sales in tonnes ('000) of fresh fish and seafood in the European Union, '000 tonnes

Category	2017	2018	2019	2020	2021	CAGR* 2017-21	Market share
Fish and Seafood	5,621.9	5,629.8	5,658.8	5,693.6	5,700.3	0.35%	-
Crustaceans	454.7	455.2	453.6	454.1	454.6	-0.01%	7.98%
Fish	4,451.0	4,466.4	4,501.1	4,535.2	4,540.6	0.50%	79.66%
Molluscs	716.2	707.7	703.8	704.2	705.3	-0.38%	12.37%

Source: Euromonitor, 2017. ***CAGR** – Compound annual growth rate

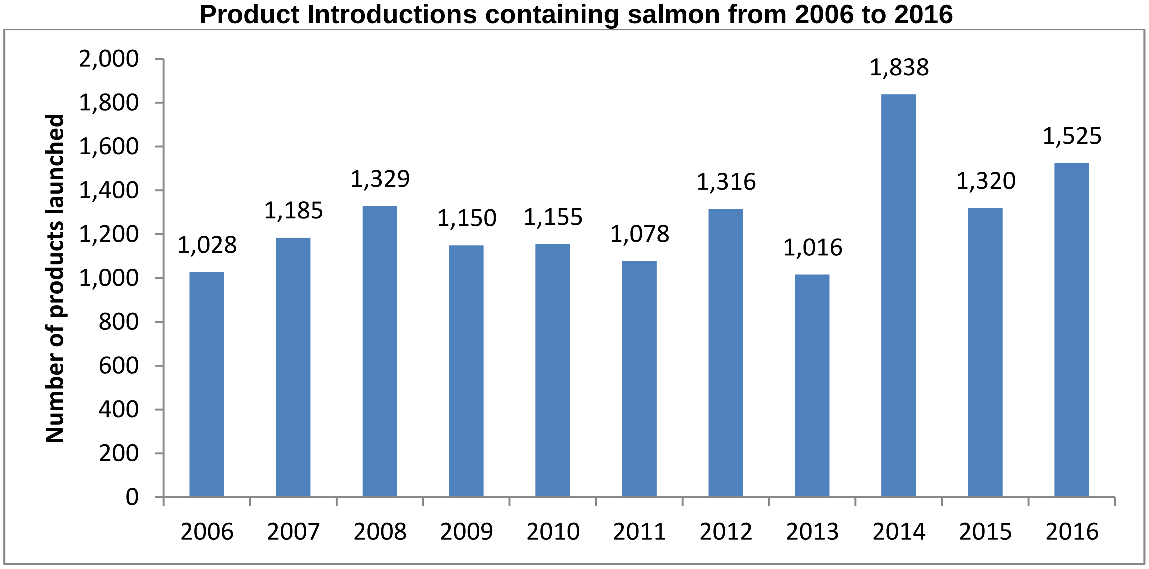
New product analysis

Over the last few years, numerous value-added packaged and fresh salmon products have been introduced in the European Union. Mintel's Global New Products Database surveys new product releases in 20 EU countries: Austria, Belgium, Croatia, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, the Netherlands, Poland, Portugal, Romania, Slovakia, Spain, Sweden and the United Kingdom. Data was not available for Cyprus, Malta, Lithuania, Latvia, Estonia, Luxembourg, Bulgaria or Slovenia.

Salmon is extensively used in pet food, especially cat food: of the 13,332 total products released in the 20 surveyed EU countries over the last ten years, 3,525 were new salmon pet food products. Over a third (38.9%) of these were wet cat food products, and a further 14.7% were dry cat food products (Mintel, 2017).

Among EU countries, France has seen the greatest number of new product releases in recent years (with 1,452 between 2012 and 2016 and 82 from January to April 2017). Germany and the United Kingdom come in second and third place, with 1,379 and 974 new products, respectively (Mintel, 2017).

Product Introductions containing salmon from 2006 to 2016



Source: Mintel, 2017.

New salmon product launches in the European Union, January 2012 to December 2016, by attribute

Product attributes*	Yearly launch counts				
	2012	2013	2014	2015	2016
Yearly product launches	1,316	1,016	1,838	1,320	1,525
Top five claims					
Not specified	413	306	327	289	335
No additives/preservatives	229	190	375	269	341
Suitable for adult pets	116	92	445	216	320
Ethical - environmentally friendly package	157	177	251	258	273
Ethical - environmentally friendly product	141	167	249	215	281
Imported status					
Imported	0	105	414	191	233
Not imported	0	86	215	211	265
Other	1,316	825	1,209	918	1,027
Top packaged types					
Tray	340	243	356	381	471
Flexible	161	148	225	173	205
Flexible stand-up pouch	149	124	161	190	222
Skinpack	4	89	246	234	234
Not specified	112	12	441	16	30
Launch types					
New product	611	447	826	465	498
New variety/range extension	493	412	651	539	663
New packaging	145	111	253	242	253
Relaunch	19	36	82	62	90
New formulation	48	10	26	12	21
Top five companies					
Lidl	22	39	81	65	90
Nestlé Purina petcare	40	34	34	45	41
Marks & spencer	44	19	45	39	36
Mars	47	15	32	29	44
Interquell	1	2	144	1	2
Manufacturer type					
Branded	824	612	1245	753	915
Private label	492	404	593	567	610

Source: Mintel, 2017.
*__Note:__ ranking are based on 2012-16 data
**__Note__: that the totals for ingredient counts will add to more than the total launches as products can use multiple ingredients.

A majority of salmon products released in the European Union are new products or range extensions. Lidl is the leading company, while Nestlé Purina is responsible for the majority of new salmon pet food releases. New products tend to be branded: 3/5 of new product releases in 2016 were branded products. European consumers want ethically-sourced, environmentally friendly, healthy products, and this is reflected in the top claims.

New product examples, 2017

Natural salmon filet

Lerøy Lohifilee Nahaton, Ruodoton (Natural Salmon Fillet) is natural, boneless and without skin. This product contains naturally occurring salt, and retails in a 560g pack, containing four 140g units, and featuring a recipe suggestion.

Company:	Lerøy
Brand:	Lerøy
Category:	Processed Fish, Meat & Egg Products
Country:	Finland
Date Published:	Apr 2017
Price:	US$17.23
Pack Size:	140.00 g

Salmon fillet in a mustard and dill sauce

Golden Seafood Ofenlachs Lachsfilet-Senf-Dill-Sauce (Salmon Fillet in a Mustard and Dill Sauce) is now available. This ready to cook product comprises salmon fillet with skin in a dill sauce seasoned with Mediterranean herbs and retails in a 280g pack including a baking tray and bearing cooking directions.

Company:	Aldi Nord
Brand:	Golden Seafood
Category:	Processed Fish, Meat & Egg Products
Country:	Germany
Date Published:	Apr 2017
Price:	US$5.17
Pack Size:	280.00 g
Claims:	Ease of Use

Organic smoked salmon

Andric Saumon Fumé Biologique (Organic Smoked Salmon)) is now available. This organic certified product has been carefully hand sliced, slowly dry-salted and smoked with beech sawdust. It retails in a recyclable 160g pack, containing four units and bearing the EU Green Leaf, AB and EcoCert logos.

Company:	Andric
Brand:	Andric
Category:	Processed Fish, Meat & Egg Products
Country:	France
Date Published:	Apr 2017
Price:	US$9.32
Pack Size:	160.00 g
Claims:	Organic, Ethical - Environmentally Friendly Package

Source for all: Mintel, 2017.

Conclusion

Salmon products are popular throughout the European Union, particularly in Sweden, Spain and Denmark. Most European supply is provided by close partners such as Norway and the Faroe Islands, as these countries have unique trading arrangements with the EU. As trade barriers between Canada and the EU are reduced as a result of CETA, Canadian producers will be able to enjoy better opportunities in Europe and will be able to better compete with more established partners. Most Canadian salmon exported to the EU is Pacific, and the European market should provide more opportunities for Canadian Pacific salmon as integration between Canada and the EU increases. Canadian Atlantic salmon, however, is likely to become much more competitive as CETA enters into force.

While fresh fish volume sales have been relatively flat in the European Union over the last five years, salmon imports have been increasing. Over a thousand new salmon products are released in the EU each year, and many of these products are in high-value sectors such as pet foods and health and wellness.

For more information

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

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Resources

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Sector Trend Analysis
Salmon Trends in the European Union
Global Analysis Report

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