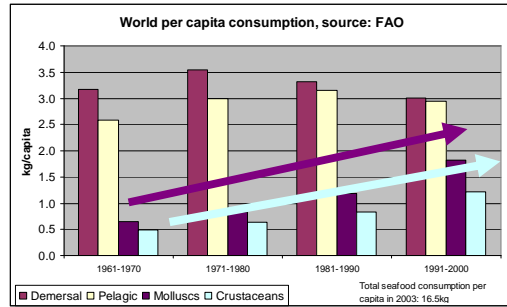


IMPORT: PLAAG OF ZEGEN?

Jaap Holstein
Holstein Consultancy

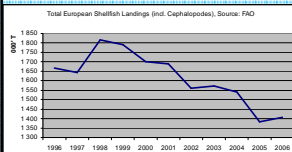
Growing world shellfish consumption



- Increasing consumption of shellfish (mollusc & crustaceans)
- Shellfish consumption is the fastest growing category.

19/03/09

European shellfish production

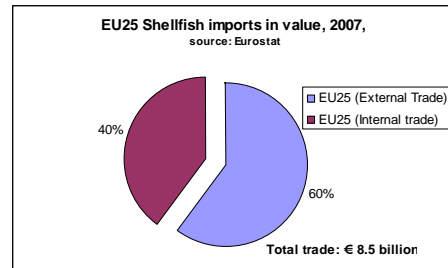


Species	Tons	Production Share
Mussels	562 365	47%
Clarae oysters	129 469	9%
Nephrops	70 387	5%
Northern prawn	68 961	5%
Japanese carpet shell	58 743	4%
Keta scallop	49 461	4%
Brown crab	46 076	3%
Common shrimp	40 432	3%
Cumefish, bobtail squids etc	31 306	2%
Arctic krill	30 943	2%

- 94 shellfish species are found in European waters.
- Total European production reaches: 1.4 MT (4.3% world landings)
- Production has dropped by 16% in 10 years.
- Decline caused by northern prawns (-93 kT), mussels (-70 kT), cockles (-23 kT)
- European shellfish production is concentrated on a few products (Mussels 40%, Oysters 9%, Nephrops 5%)
- Importance of Aquaculture

NR / BIM-MDD-ISA Conference
19/03/09

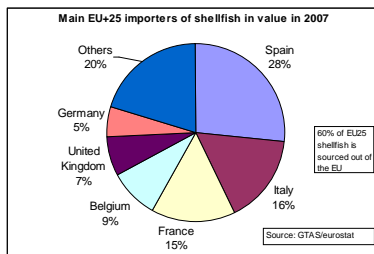
Shellfish accounts for 1/3 of EU +25 seafoods imports



- Shellfish accounts for 28% of EU+25 imports.
- EU+25 shellfish imports (internal & external) represented €8.5 billion.
- EU+25 is highly dependent on external imports (60% in value, 63% volume).

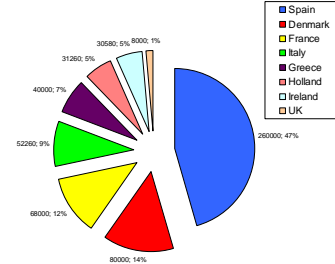
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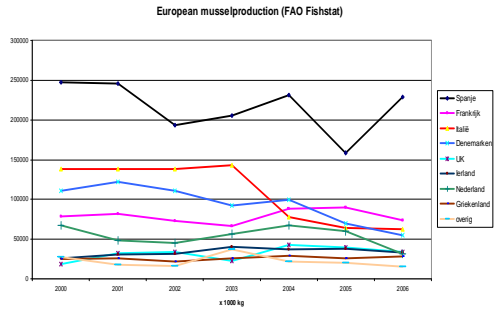
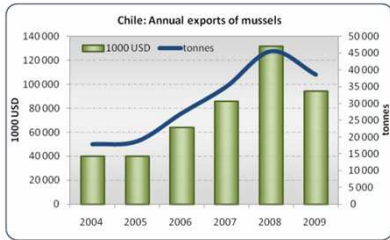
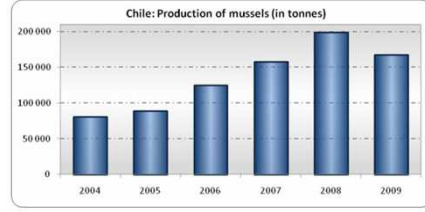
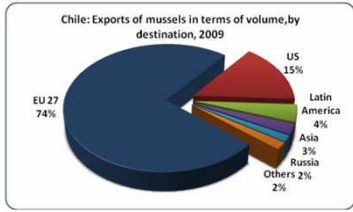
3 countries dominate the trade



- 80% of EU+25 imports of value is achieved by 6 countries.
- Spain, Italy, France (35% of EU population) generate 58% of imports.
- Main shellfish importing countries are also main shellfish producers. → market focused on shellfish consuming pools.

main EU mussel production countries 2006 (FAO Globefish)

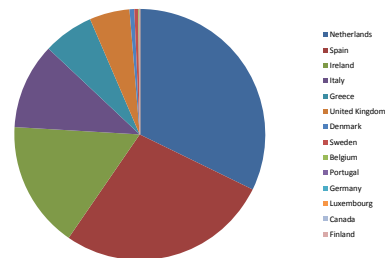




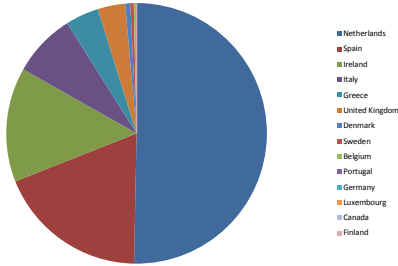
Frankrijk: mosselen, levend of gekoeld, met of zonder schelp

Partner Country	2010			
	EUR	hoeveelheid	€/kg	hoev.heid %
World	413,234.36	4209.3	0.98	
Netherlands	207919.98	1355.2	1.53	32.2
Spain	77207.80	1152.7	0.67	27.4
Ireland	58676.80	687.6	0.85	16.3
Italy	32467.96	466.0	0.70	11.1
Greece	17059.00	27.34	0.62	0.6
United Kingdom	14163.20	215.2	0.65	5.2
Denmark	2525.20	26.7	0.95	0.6
Sweden	1829.60	20.5	0.88	0.5
Belgium	1206.10	7.9	1.61	0.2
Portugal	115.50	3	11.52	0.0
Germany	42.40	4	1.06	0.0
Luxembourg	20.90	1	2.09	0.0
Canada	0	0	0.00	0.0
Finland	0	0	0.00	0.0

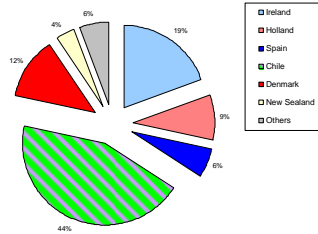
Hoeveelheid (NL = 13,5mln kg, 32,2%)



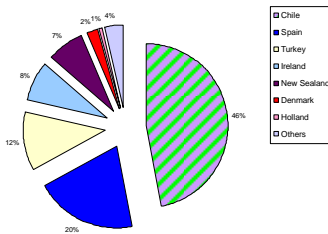
% waarde (NI = 20,8 mln €, 50,3%)



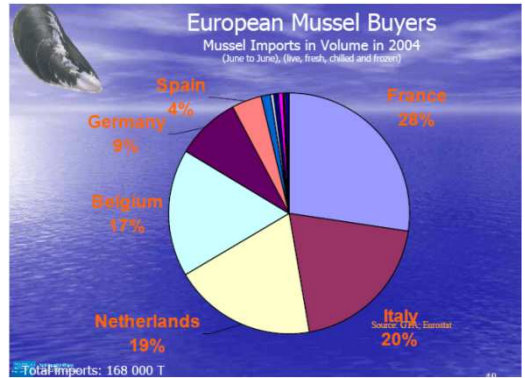
France: import preserved mussels 2007 (18.000 t)



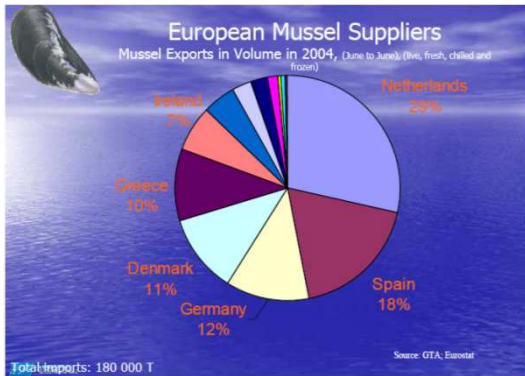
Italy: import mussel preserves 2007 (10.000t)



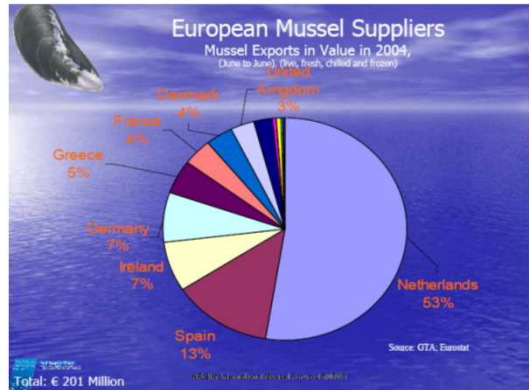
European Mussel Buyers
Mussel Imports in Volume in 2004
(June to June), (live, fresh, chilled and frozen)

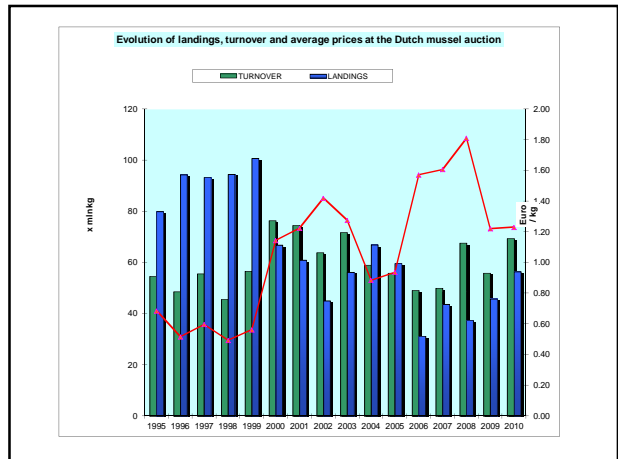
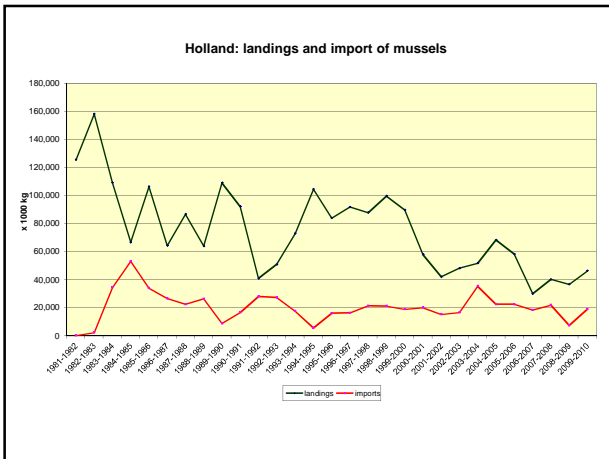
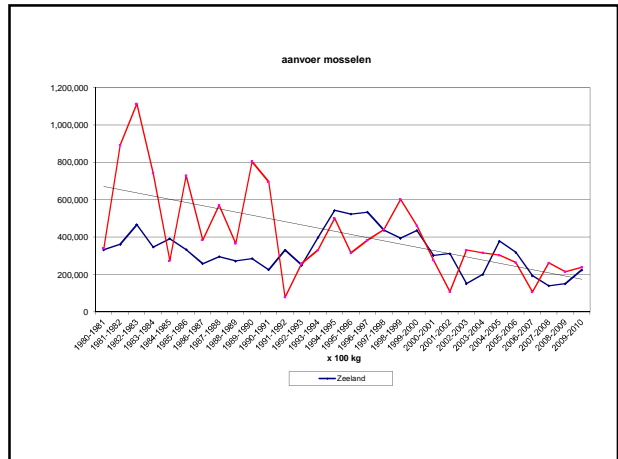
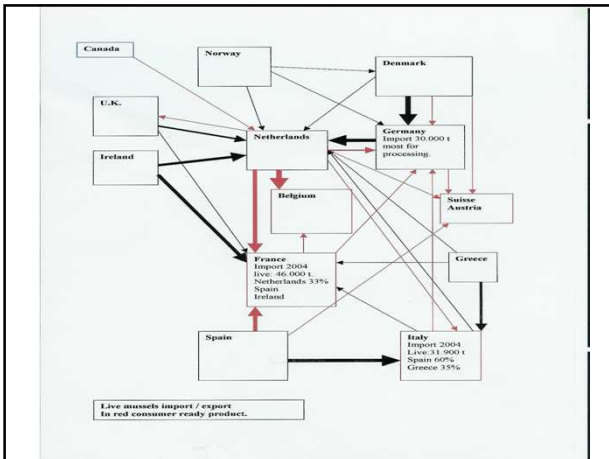


European Mussel Suppliers
Mussel Exports in Volume in 2004, (June to June), (live, fresh, chilled and frozen)



European Mussel Suppliers
Mussel Exports in Value in 2004, (June to June), (live, fresh, chilled and frozen)





produit	moyen Euro	varia. Euro	mini Euro	maxi Euro
Ronen Marée-Fraîche 13/01/11 (Gros) unité : le kg*				
MOULE de bouchot France				
MOULE de mer Espagne	3.50	=	2.95	3.80
MOULE de mer France	2.15	=		
MOULE de mer Pays bas	2.15	=	1.85	2.50
Rungis Marée-Fraîche 15/01/11 (Gros) unité : le kg*				
MOULE Espagne	2.00	=	1.80	
MOULE de bouchot France	2.00	=	1.90	2.20
MOULE de mer Pays bas	1.80	=	1.70	2.00

Prijs in de Franse supermarkt (januari 2011)

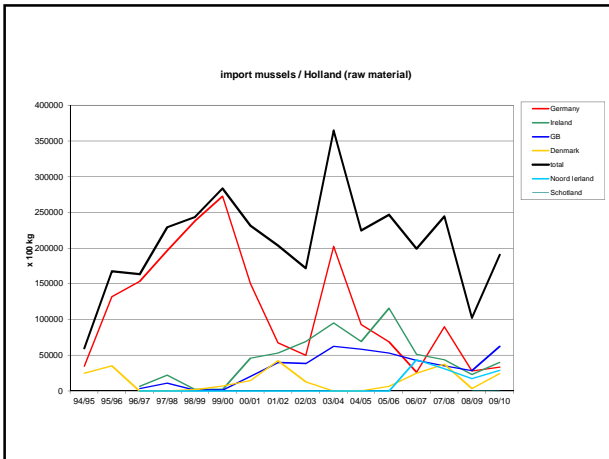
Carrefour discount label

Spanje € 3,21/kg

Nederland € 2,50

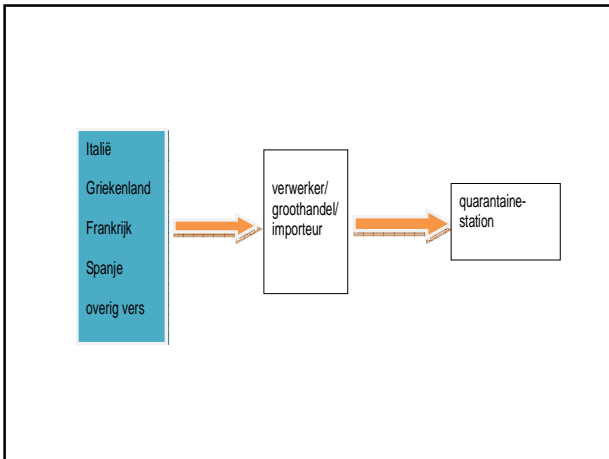
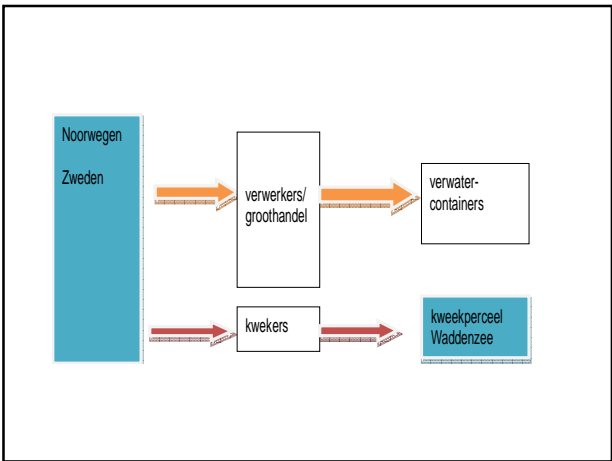
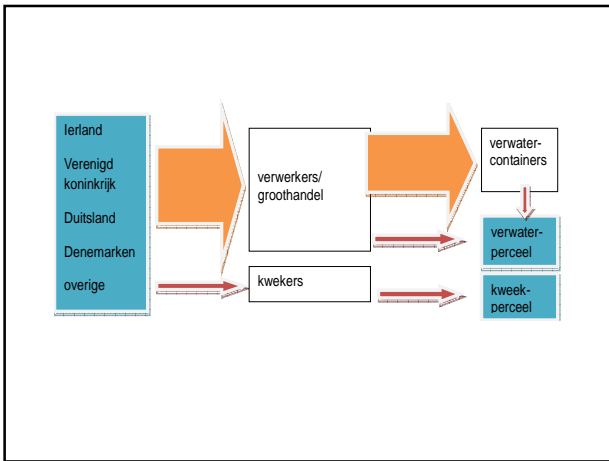
Systeme U promo

fished in N.E. Atlantic or farmed in the UK € 1,95



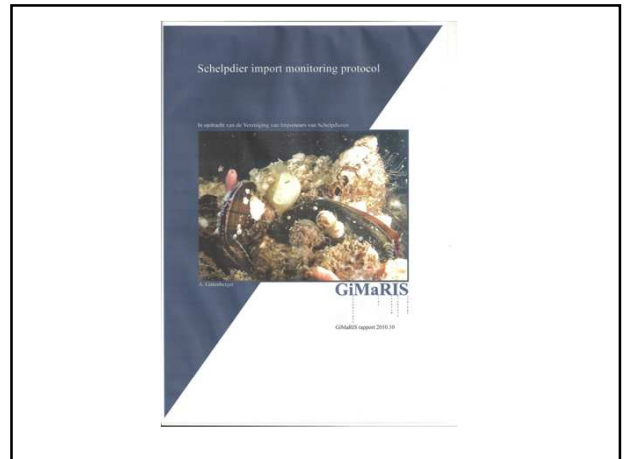
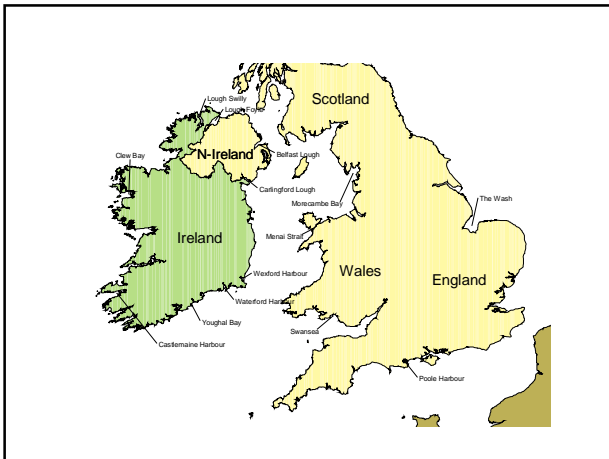
Conclusie deel 1

Import stop, Yerseke kapot



import

- met Nb-wet verg. : uitzaaien op percelen
- zonder Nb wet verg.: in quarantaine
- Quarantaineverordening regelt ook lozen van proceswater en storten van tarra.



Acties gekoppeld aan de monitoring

- enkele big bag bemonstering
- herhaalde big bag bemonstering
- sasi = schelpdier afhankelijke soorten inventarisatie
- quarantaine + schoon vissen

Resultaten monitoring

gebied	Lijst 2	Lijst 1	uitheems	Aanwezig in OS	Probleemsoort
Castlemaine	5	58	8	2	0
Youghal Bay	?	42	5	2	0
Waterford Harbour	?	57	7	2	0
Wexford Harbour	5	88	14	10	0
Dundalk	?	7	1	1	0
Carlingford Lough	10	114	16	9	0
Belfast Lough	3	59	14	5	0
Lough Foyle	?	70	14	5	0
Lough Swilly	?	38	5	2	0
Menai Strait	7	79	11	5	0
Swansea	?	23	4	3	0
Poole Harbour	?	65	12	10	0
Morecambe Bay	?	12	1	0	0

Conclusies deel 2

De angst voor introductie van exoten met het transport van mosselen is niet terecht.

Het zuid - noord transport van mzi zaad hangt niet af van het importeren van mosselen.