



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 1/27/2006

GAIN Report Number: E36013

EU-25

Fishery Products

Annual Report - EU Policy & Statistics

2006

Approved by:

Norval E. Francis, Jr.
U.S. Mission to the EU

Prepared by:

Hilde Brans

Report Highlights:

This report gives an overview of the current situation in the EU fishery sector, provides information on the EU's import policy and statistical data on EU fish catches, aquaculture, and imports and exports.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Brussels USEU [BE2]
[E3]

EXECUTIVE SUMMARY	3
SECTION I: SITUATION AND OUTLOOK.....	3
PRODUCTION – GENERAL	3
EU Fish Catches.....	3
Aquaculture	5
PRODUCTION POLICY	6
SIMPLIFICATION OF THE COMMON FISHERIES POLICY (CFP).....	6
2006 FISH QUOTAS: “THE PROPOSAL”	7
OUTCOME OF THE DECEMBER 2005 FISHERIES COUNCIL: “THE FINAL DEAL”	7
Total Allowable Catches (TACs).....	7
Recovery Plans.....	8
Market Intervention	8
TRADE AGREEMENTS	9
Fisheries Agreement with Norway	9
Fisheries Agreement with Morocco.....	9
IMPORT POLICY	10
New EU rules	10
U.S. Exports to the EU	10
IMPORT CONTROLS & CERTIFICATION.....	11
Controls	11
Hygiene & Certification	11
CONTAMINANTS / RESIDUES	13
TRACEABILITY.....	13
IMPORT DUTIES & QUOTAS	13
Tariffs.....	13
Quotas	13
MARKETING	15
LABELING	15
Retail	15
Allergen Labeling	15
Eco-labeling.....	15
PACKAGING.....	15
CONSUMPTION	15
TRADE – GENERAL.....	16
TRADE – EU/WORLD.....	16
TRADE – EU/US	17
SECTION II: STATISTICAL TABLES	21
GLOSSARY & SOURCES	25

EXECUTIVE SUMMARY

The EU has one of the world's highest trade deficits in fish and fishery products. In CY 2004, EU imports of fish and fishery products totaled EUR 12 billion while exports totaled EUR 2 billion, a trade deficit of EUR 10 billion. The deplorable state of certain EU fishery stocks and the reduction in annual catch quotas make the EU more and more dependent on imports from third countries for its processing industry. In CY 2004, 82% of total EU fish imports were non-processed fishery products. Products under HS code 0304 "fish fillets and other fish meat" account for 25% of total EU fish imports. In this category, 13% of total EU imports originated in the U.S.

The U.S.' seafood inspection system was audited by an EU inspection team in the summer of 2003. In November 2005, the EU agreed to transfer the U.S. to the list of "fully-harmonized" countries authorized to export fishery products to the EU. This change in status should have been published in the EU's Official Journal at the end of December 2005 but due to a complex administrative procedure, publication is expected in the first half of 2006.

In April 2004, the EU adopted a new food control regulation and the so-called "hygiene package". These new rules went into force on January 1, 2006, and merge requirements that were previously scattered over 17 different directives. Imported products must comply with the new hygiene rules.

In terms of volume, 5.8% of the EU's total imports of fish and fishery products came from the U.S in CY 2004 (4.3% in CY 2003). The EU imported 246,786 MT of fish and fishery products from the U.S., with a value of EUR 594 million.

SECTION I: SITUATION AND OUTLOOK

PRODUCTION – GENERAL

EU Fish Catches

In the period 1995-2003, the EU-25 catch has decreased by 26%. The major decrease during this period was recorded by Denmark, with a cut of 48%. In 2003, the EU-25 catch was 5.9 million MT of which 4.2 million MT originated in the Northeast Atlantic. This region is of major importance to the EU-25, accounting for 71 % of its worldwide catch.

In 2003, Denmark and Spain were the main contributors to the EU-25 total catch. Compared to 2002, fish catches decreased in most member states except in Germany, France, Italy, Netherlands and Portugal. The new member states only accounted for 9% of the EU-25 total catch. The main species caught in 2003 were Atlantic herring, blue whiting, mackerel and sprat. Severely depleted sandeel and anchovy stocks led to the emergency closure of those fisheries in 2005.

Table 1: Nominal fish catches, 1995-2004, in 1,000 MT live weight				
	1995	2000	2003	2004 (Provisional)
Belgium	36	30	27	26
Denmark	1 999	1 534	1 031	1 090
Germany	239	205	261	262
Greece	152	99	92	75
Spain	1179	995	898	*
Finland	155	156	122	136

France	675	690	709	667
Ireland	390	283	266	307
Italy	397	300	283	279
Netherlands	438	496	526	520
Austria	0	1	0	0
Portugal	264	188	214	207
Sweden	405	339	287	270
U.K.	910	746	640	654
Total EU-15	7 237	6 062	5 369	4 493*
Czech Rep.	4	5	5	5
Estonia	132	113	79	86
Cyprus	9	67	2	2
Latvia	149	136	115	125
Lithuania	57	79	157	156
Hungary	7	7	7	*
Malta	5	1	1	1
Poland	429	218	180	172
Slovenia	2	2	1	1
Slovak Rep.	2	1	2	3
Total EU-25	8 034	6 150	5 918	5 044*

Source: Eurostat – * 2004 data are not yet available for Spain and Hungary.

Table 2: Distribution of EU catches by fishing zones, 2002-2003, in 1,000 MT live weight

	2002 (EU-15)	2003 (EU-15)	2003 (EU-25)
Northwest Atlantic	58	63	96
Northeast Atlantic	4 274	3 869	4 173
Eastern Central	409	427	575
Mediterranean & Black Sea	505	499	502
Southwest Atlantic	59	36	37
Southeast Atlantic	9	13	22
Indian Ocean, West	279	315	315
Inland waters	86	86	125
Total	5 739	5369	5918

Source: Eurostat

Table 3: Catches of principal species by the EU-25, 2002-2003, in 1000 MT live weight

	2002	2003
Common sole	33	36
European plaice	90	83
Cod	163	141
Norway pout	78	23
Haddock	76	63
Blue whiting	215	338
Whiting	41	35
European hake	57	58
Ling	20	19
Saithe	68	56
Sandeel	723	307
Atlantic redfish	58	62

Angler	20	19
Atlantic horse mackerel	13	176
Atlantic herring	652	673
European pilchard	264	245
European anchovy	124	93
European sprat	514	536
Skipjack tuna	216	222
Yellowfin tuna	161	211
Albacore	26	28
Swordfish	28	32
Atlantic mackerel	443	396
Norway lobster	55	54
Edible crab	37	40
Common shrimps	32	36
Blue mussel	127	95
Mediterranean mussel	46	43
Striped venus	30	45
sub-total	4532	4166
all others	1814	1852
Total catches	6347	5918

Aquaculture

In 2003, the EU-15 produced 1.3 million MT of fishery products from aquaculture. Four member states (Spain, France, Italy and the U.K.) accounted for 72% of the EU-15 production in 2003 (68% of the EU-25). The three main activities in EU aquaculture are sea fish farming, marine shellfish farming and fish farming in fresh water. Main species produced in the EU are Blue and Mediterranean mussel, rainbow trout, salmon and oyster. Carp is the most produced species in the new member states.

AQUACULTURE PRODUCTION BY MEMBER STATE – CY 2003 (Metric Tons)	
Belgium	1 010
Denmark	32 187
Germany	74 280
Greece	101 209
Spain	313 288
France	245 846
Ireland	62 516
Italy	191 662
Netherlands	67 025
Austria	2 233
Portugal	7 829
Finland	13 335
Sweden	6 334
United Kingdom	181 837
Total EU-15	1 300 591
Czech Rep.	19 670
Estonia	372
Cyprus	1 821
Latvia	637

Lithuania	2 356
Hungary	11 870
Malta	881
Poland	34 526
Slovenia	1 353
Slovak Rep.	881
EU-25	1 374 958

Source: Eurostat

In the face of declining fisheries landings and new market demand, aquaculture is becoming increasingly important in the EU. The [reformed Common Fisheries Policy](#) (CFP) encourages the development of sustainable aquaculture to help create new employment opportunities in areas dependent on fisheries. Certain aquaculture projects are eligible to receive financial support from the EU through the Financial Instrument for Fisheries Guidance (FIFG). FIFG aid is granted on the basis of structural development programs established by member states' authorities and approved by the European Commission. Three essential criteria must be met: quality and food safety, the creation of new jobs and environmental protection. The Commission is also looking at including standards on organic aquaculture in the EU regulation establishing a framework of EU rules for production, labeling and control of organic farming.

The abundant supply of popular species such as salmon, seabass and seabream has had a significant effect on prices. The EU identified "diversification" as an area in which scientific research could play a key role. EU funded research focused on three main areas: new species, health management and genetics. Projects on new species looked at a wide range of potential aquaculture candidate species such as halibut, bluefin tuna, sole, wolfish, turbot, cuttlefish and octopus.

Aquaculture - Animal Welfare

In August 2005, the European Commission presented a [proposal](#) for new rules on the health of farmed fish. In the EU, financial losses due to disease are estimated to be 20% (EUR 500 million) of the production value. The current legislation was developed twenty years ago and needs to be updated to take account of a wider range of aquaculture practices and species in an expanded EU. The main focus of the proposed new rules is on disease prevention and disease eradication measures. If adopted, the proposal will repeal the existing legislation and replace Directives 91/67/EEC, 93/53/EEC and 95/70/EC with one new Directive.

PRODUCTION POLICY

SIMPLIFICATION OF THE COMMON FISHERIES POLICY (CFP)

In October 2005, the European Commission tabled a three-year action program to simplify EU legislation. An [Action Plan for simplifying the Common Fisheries Policy](#) over the period 2006-2008 is the first sectoral action plan adopted in this context. It identifies a series of priority initiatives in two main areas, i.e. conservation and control. The regulations that will be targeted include instruments dealing with quotas and fishing effort, technical measures for the protection of young fish, collection and management of data, monitoring measures, reporting obligations and authorizations to fish outside EU waters. By focusing on conservation and control, the Commission hopes to improve working conditions for both fishermen and public officials in the fisheries sector. For details on the CFP, see GAIN reports [E23007](#) and [E24009](#).

2006 FISH QUOTAS: "THE PROPOSAL"

Each year in December, the Commission presents its Total Allowable Catches (TAC) and quota proposal to the Council. The Commission tries to take account in its proposal of the latest scientific advice from the independent International Council for the Exploration of the Sea (ICES) and the Commission's own Scientific, Technical and Economic Committee on Fisheries (STECF), as well as input from stakeholders. However, a compromise has to be reached between the different parties which means that the changes in TACs are never as drastic as recommended. This year, TACs and quotas have been divided for the first time into two proposed regulations: one for the Baltic Sea and the other covering all other areas.

The Commission proposal included:

- Cod stocks outside the Baltic Sea - due to the alarming situation of cod stocks in the Kattegat, Skagerrak, North Sea, Eastern Channel, West of Scotland and Irish Sea, a 15% reduction in both catch and days at sea for vessels targeting cod. As the majority of fishing mortality for cod stocks occurs as by-catch to vessels fishing on other species, the Commission also proposed a 15% effort reduction for trawlers targeting species such as nephrops, whiting and flatfish.
- Stocks for which a recovery plan has been proposed but has not yet been adopted by the Council – TACs and effort limitation are calculated in line with the harvest rules contained in those plans.
- Deep-sea species – due to the extremely fragile biological state of deep-sea stocks, a 20% cut in effort.
- Short-lived species – management plans for endangered stocks (anchovy and sandeel).
- Baltic cod stocks – despite scientific advice that cod stocks are at critically low levels, an increase in TAC on condition that the fishing effort is reduced by 10% in addition to the setting up of temporary closures. This scheme would be the basis for a long-term recovery plan for cod that the Commission is preparing.

OUTCOME OF THE DECEMBER 2005 FISHERIES COUNCIL: "THE FINAL DEAL"**Total Allowable Catches (TACs)**

A compromise deal on TACs and quotas for 2006 was reached at the December 2005 Fisheries Council. There were no votes against the compromise deal, with only Sweden abstaining. The biggest increase compared to the initial proposal is noted for anchovy (Portuguese Coast & Azores) + 18%, anglerfish (Bay of Biscay) + 22%, Norway lobster (Norwegian Sea) + 30%, plaice (Irish Sea, Eastern and Western Channel) + 17%.

WWF (World Wildlife Fund) condemned the outcome of the Fisheries Council saying that the EU Fisheries Ministers have effectively "written off cod as a species in the North Sea". In a statement WWF said that despite repeated scientific advice from ICES to close cod fisheries, the Fisheries Council has yet again given the green light to fish on a stock that is on the brink of collapse. WWF states that with over 80% of commercial fish species in EU waters now below safe biological limits, the EU should listen and respond to ICES advice.

The main features of the compromise deal are:

- Deep-sea species: a 10 % reduction instead of the proposed 20 % cut and a ban on the use of gillnets in the northern part of the western waters (west of Scotland and Ireland).
- Cod: a 15 % reduction in TAC and fishing effort as proposed.
- Blue whiting: following the recent EU-Norway agreement, the EU TAC is set at 402,558 MT shared by 8 member states.
- Anchovy (Bay of Biscay): a precautionary TAC level of 5,000 MT as of March 1, 2006 (conditional on new scientific advice in 2006) instead of the proposed total ban.
- Sole stocks in Western Channel: a 10 % reduction of the fishing effort as proposed. A derogation to the fishing effort limitation in number of days is introduced for vessels fishing with static nets greater than 120 mm.
- Baltic cod: TACs have been set at higher levels compared to 2005, from 38,882 MT to 45,339 MT in the eastern Baltic and from 24,700 MT to 28,400 MT in the west Baltic. The fishing effort limitation in the west Baltic has been increased with a 91 days fishing ban while the effort limitation in the eastern Baltic has been decreased from a 138 days fishing ban to 119 days. This effort limitation would be divided into periods of closure during the summer and the spring. According to the EU press, this deal puzzled analysts as scientific evidence showed that the gravity of the situation in cod stocks was exactly the opposite. The Commission will present a long-term recovery plan for Baltic cod.

The TACs for 2006 were published in [Official Journal L16](#) of January 20, 2006.

Recovery Plans

There are two types of multi-annual plans: recovery plans to help rebuild stocks that are in danger of collapse and management plans to maintain stocks at safe biological levels. Each of these plans contains formulas for calculating annual TACs and quotas. Both management and recovery plans are based on a precautionary approach to fisheries management. So far the following plans have been adopted:

- Recovery plan for Southern hake and Norway lobster in the Cantabrian Sea and Western Iberian peninsula (Council Regulation 2166/2005).
- Recovery plan for Northern hake (Council Regulation 811/2204).
- Recovery plan for cod in the North Sea, Kattegat, Skagerrak, Eastern Channel, west of Scotland and Irish Sea (Council Regulation 423/2004).

Proposals have been adopted for a long-term plan for plaice and sole in the North Sea; for sole in the Western Channel and the Bay of Biscay; for European eel.

Market Intervention

[Council Regulation 2033/2005](#) fixes for the fishing year 2006 the guide prices and Community producer prices for certain fishery products. The guide prices are set annually according to the average prices registered over the previous three years in representative ports. Market intervention mechanisms are activated when the prices of certain fish and shellfish products fall below a given level, i.e. the withdrawal price. The withdrawal price is

determined annually by the European Commission and is based on the guide prices set by the Council. Intervention measures include financial aid for withdrawing products from the market ([Commission Regulation 2181/2005](#)) and private storage aid for frozen products that cannot be sold at the EU selling price and are temporarily withdrawn from the market ([Commission Regulation 2180/2005](#)). EU selling prices are also fixed annually and range from 70% to 90% of the guide prices ([Commission Regulation 2176/2005](#) and [2177/2005](#)).

TRADE AGREEMENTS

The type of fisheries agreements concluded between the EU and third countries varies in terms of the partner country. Reciprocity agreements are usually concluded with Northern European countries (Faroe Islands, Iceland and Norway) and exchange fishing opportunities in their respective waters. With other countries (African, Indian Ocean countries and Greenland) the EU concludes partnership agreements. These countries receive a financial contribution from the EU for access to their fishing zones. A financial contribution is also required of vessel owners wishing to operate within the framework of these agreements.

Agreements have been concluded with Angola, Cape Verde, Comoros, Ivory Coast, Gabon, Gambia, Greenland, Guinea, Guinea-Bissau, Kiribati, Madagascar, Mauritius, Mauritania, Mozambique, Sao Tome, Senegal, Seychelles, Solomon Islands, Faroe Islands and Iceland. Agreements with Norway and Morocco were recently renewed.

Fisheries Agreement with Norway

In December 2005, the EU and Norway concluded four agreements that will form the basis of a new framework of bilateral relations. Key elements of the agreements are reducing fishing effort, improving control measures and ensuring sustainable management of the shared fishing resources. The agreements relate to the allocation and access to blue whiting and herring stocks, the lifting of the ban of the current ban on the landing of herrings by EU vessels in Norwegian ports and the transit of fisheries products from EU vessels through Norway.

Outcome of EU-Norway fisheries negotiations for 2006 (in MT):

Species	TACs 2005	TACs 2006	Norway	EU
Cod	27,300	23,205	3,945	19,260
Haddock	66,000	51,850	7,016	44,835
Saithe	145,000	123,250	64,090	59,160
Whiting	28,000	23,800	2,380	21,420
Plaice	59,000	57,441	1,621	55,820
Mackerel	44,879	47,132	30,178	16,954
Herring	535,000	454,751	131,878	322,873

Source: DG Fisheries and Maritime Affairs

Fisheries Agreement with Morocco

On July 28, 2005, the EU-Morocco Partnership Agreement was renewed for a period of 4 years. The previous agreement ended in November 1999 and attempts to negotiate a new one had failed. A large number of Spanish and Portuguese vessels were affected by the non-renewal of the 1995-1999 Agreement and compensation was granted to the affected fleets for temporary cessation of activities. The new agreement will provide fishing possibilities for 119 EU vessels and an annual quota of 60,000 MT of small pelagic species. The EU's financial compensation to Morocco will amount to EUR 144 million for the 4-year period. Of

this amount, EUR 36 million will be earmarked to promote measures specifically designed to help Morocco's small-scale fleet and to support the development and implementation of a sustainable fisheries policy.

IMPORT POLICY

Imports of fish and fishery products into the EU are subject to official certification based on the EU's recognition of the exporting country's competent authority. Exporting countries must have a competent authority that is responsible for official controls throughout the production chain. In April 2004, the EU adopted a new food control regulation and the so-called "hygiene package". The new hygiene rules merge and simplify detailed and complex hygiene requirements that were previously scattered over 17 different directives. General hygiene rules are laid down for the production of all food, while specific rules are laid down for meat and meat products, bivalve mollusks, fishery products, milk and dairy products, eggs and egg products, frogs' legs and snails, animal fats, gelatin and collagen. Imported products must comply with the new hygiene rules that entered into force on January 1, 2006. Directives 91/492/EC and 91/493/EC on the health conditions for the production and placing on the market of live bivalve mollusks and fishery products have been repealed by the new rules. Detailed information on the new hygiene rules is available on our website at <http://www.useu.be/agri/foodsafe.html>.

New EU rules

Food & Feed Controls:

- [Regulation 882/2004 on official controls performed to ensure the verification of compliance with food and feed law, animal health and animal welfare rules](#) (entered into force Jan. 1, 2006).

Hygiene package:

- [Regulation 852/2004 on the hygiene of foodstuffs](#) (entered into force Jan. 1, 2006).
- [Regulation 853/2004 laying down specific hygiene rules](#) (entered into force Jan. 1, 2006).
- [Regulation 854/2004 laying down specific rules for the organization of official controls on products of animal origin intended for human consumption](#) (entered into force Jan. 1, 2006).
- [Directive 2002/99/EC laying down health rules governing the production, processing, distribution and importation of products of animal origin](#) (entered into force Jan. 1, 2005).
- [Directive 2004/41/EC repealing 17 existing directives](#) (entered into force Jan. 1, 2006).

Implementing measures under the new hygiene rules:

- [Regulation 2073/2005 on microbiological criteria for foodstuffs](#) (entered into force Jan. 1, 2006).
- [Regulation 2074/2005 laying down implementing measures for certain products under Regulation 853/2004, Regulation 854/2004 and Regulation 882/2004; and derogating from Regulation 852/2004; and amending Regulations 853/2004 and 854/2004.](#)

A guidance document "Key questions related to import requirements and the new rules on food hygiene and food controls" is available at http://europa.eu.int/comm/food/international/trade/interpretation_imports.pdf.

U.S. Exports to the EU

Third countries exporting fish and fishery products to the EU must have public health legislation and control systems in place equivalent to those in the EU. The EU's [Food and Veterinary Office \(FVO\)](#), part of DG Health & Consumer Protection, is the agency responsible for checking third countries' compliance with EU food safety requirements.

Third countries from which the EU authorizes imports of fishery products and bivalve mollusks are classified into two categories. The first category consists of the so-called “fully-harmonized” countries on “List I” that have been audited by an EU inspection team and for which a specific decision has been taken under Council Directives 91/492/EEC (directive on production standards for mollusks) and 91/493/EEC (directive on production standards for fishery products). The second category consists of “pre-listed” countries on “List II” whose control systems have not yet been inspected by the FVO. The lists of countries authorized to export fishery products to the EU are published in [Commission Decision 97/29/EC](#), as amended; the lists of countries authorized to export mollusks are published in [Commission Decision 97/20/EC](#), as amended.

The U.S. was included in ‘List II’ for both fishery products and mollusks. In order to move from “List I” to “List II”, the U.S.’ seafood inspection system was audited by a FVO inspection team in the summer of 2003. The EU has agreed to transfer the U.S. to the list of “fully-harmonized” countries (List II) for fishery products and the administrative procedure to fully implement this arrangement should be published in the EU’s Official Journal in the first half of 2006. For the imports of mollusks, the U.S. is not yet “fully harmonized”.

Although Directives 91/492/EEC and 91/493/EEC have been repealed by the new hygiene rules, certain implementing rules adopted on the basis of these directives still apply. Article 4, point 3 of Directive 2004/41/EC (see new rules) allows the continuation of certain provisions pending the adoption of the necessary provisions established by the new hygiene rules.

IMPORT CONTROLS & CERTIFICATION

Controls

Imports of fishery products from third countries must enter the EU via an approved Border Inspection Post. [Directive 97/78/EC](#), as amended, lays down principles for veterinary checks on products of animal origin imported from third countries. Inspections of consignments include: documentary check (health certificates), identity check (visual inspection to ensure consistency between certificates and product) and physical check (inspection of the product itself). Non-complying consignments will either be destroyed or, under certain conditions, re-dispatched within 60 days.

The EU’s new regulation on food and feed controls, Regulation 882/2004 which entered into force on January 1, 2006, supplements Directive 97/78/EC. It requires competent authorities to carry out additional official controls to verify compliance aspects of food or feed law that are not covered by Directive 97/78/EC. Title VI, Chapter II of Regulation 882/2004 relates to “Import Conditions”. More information can be found in [GAIN report E34023](#) “Food and Feed Controls” and on our website at <http://www.useu.be/agri/foodsafe.html>.

Hygiene & Certification

[Directive 2002/99/EC](#) establishes animal health rules governing the production, processing, distribution and introduction of products of animal origin for human consumption, including aquaculture products. It sets out general principles for certification. Chapter II relates to imports from third countries. Certificates must be issued in the official or one of the official languages of the member state of destination and those of the member state in which the border inspection takes place or must be accompanied by a certified translation. A member state **may** consent to the use of an official Community language other than its own but exporters are advised to check with the competent authorities in the country of destination.

Certificates must be signed **before** the consignment leaves the control of the competent authority in the country of origin otherwise the EU will not accept the goods. [Directive 2002/99/EC](#) is part of the EU's new "food hygiene package" and entered into force on January 1, 2005

[Regulation 852/2004](#) establishes general requirements for primary production, including HACCP. [Regulation 853/2004](#) lays down specific hygiene rules and labeling requirements for live bivalve mollusks, fishery and processed products. Regulation 854/2004 establishes specific rules for the organization of official controls on products of animal origin intended for human consumption. [Regulation 2073/2005](#) on microbiological criteria for foodstuffs complements the EU food hygiene legislation. This regulation includes requirements to test mollusks for E coli and fishery products for histamine. [Regulation 2074/2005](#) lays down implementing measures for certain products under Regulations 853/2004 and 854/2004. Annex III to Regulation 2074/2005 relates to fishery products.

Each shipment must be accompanied by a health certificate using the model provided by Commission Decision 2001/67/EC for fishery products and by Commission Decision 96/333/EC for mollusks, echinoderms, tunicates and marine gastropods. Although Decision 96/333/EC was set to expire on December 31, 2005, article 4 (paragraph 3) of Directive 2004/41/EC (see new EU rules) allows the continuation of the provisions in Decision 96/333/EC pending the adoption of the necessary provisions established by the new hygiene rules. The U.S.' transfer to the list of "fully-harmonized" countries implies that the model certificate under Decision 2001/67/EC will be replaced by a new "U.S. specific" health certificate. The new rule will become effective 45 days after publication in the Official Journal.

[Commission Decision 2003/858/EC](#), as amended, lays down the animal health conditions and certification requirements for imports of live fish, their eggs and gametes intended for farming, and live fish of aquaculture origin and products thereof intended for human consumption.

[Commission Decision 2003/804/EC](#), as amended, lays down the animal health conditions and certification requirements for imports of mollusks, their eggs and gametes for further growth, fattening, relaying or human consumption. This Decision also sets out a temporary list of third countries, including the U.S., from which the EU member states are authorized to import live mollusks. Decision 2003/804/EC was set to expire on May 31, 2005, but was amended by [Decision 2005/409/EC](#) after the EU assessed and approved the U.S.' export certification program. However, the authorization is limited to certain states: Humboldt Bay (California), Netarts Bay (Oregon), Wilapa Bay, Totten Inlet, Oakland Bay, Quilence Bay and Dabob Bay (Washington) and Nelha (Hawaii).

The Commission has published a working document "Guidelines for the interpretation of Decisions 2003/804/EC (mollusks) and 2003/858/EC (fish) on harmonized certificates for the import of aquaculture animals from third countries" which can be downloaded from http://europa.eu.int/comm/food/animal/liveanimals/aquaculture/guidelines_certificates_aquaculture.pdf.

For information on EU certification requirements, please contact:

Stephane Vrignaud
Fisheries Trade Attache
NOAA Fisheries Representative to the EU
US Mission to the EU
Tel: +322-508-2842

Fax: +322-513-1228

E-mail: stephane.vrignaud@mail.doc.gov

CONTAMINANTS / RESIDUES

Commission Regulation 466/2001, as amended, sets out maximum levels for certain contaminants in foodstuffs, incl. fishery products. Commission Regulations 221/2002 and 78/2005 (amendments to Regulation 466/2001) cover heavy metals lead, cadmium and mercury. Information on contaminants can be found at www.useu.be/agri/pesticides.html.

The monitoring of residues of veterinary drugs and other chemicals in animals and animal products, including aquaculture, is addressed in Council Directive 96/23/EC. In order to export to the EU, third countries must submit residue-monitoring plans. The U.S. is included in the list established by [Commission Decision 2004/685/EC](#) on the approval of residue monitoring plans submitted by third countries.

TRACEABILITY

On January 1, 2005, general traceability became mandatory throughout the EU food system. [Regulation EC/178/2002](#), as amended, sets out general provisions for traceability covering all food and feed operators. A [guidance document](#) for the implementation of this requirement has been published on DG Health & Consumer Protection's website. According to this guidance document, the requirement for traceability is limited to ensuring that businesses are at least able to identify the immediate supplier of the product in question and the immediate subsequent recipient. Although the regulation does not apply to third countries, EU importers must comply with the traceability requirement. It is common practice among EU importers to request trading partners to meet the traceability requirement but such requests are part of contractual arrangements and not a requirement established by the Regulation. More information can be found in [GAIN report E35012](#) "EU Traceability Guidelines".

IMPORT DUTIES & QUOTAS

Tariffs

EU import duties for fish and processed fish products are published in the EU's Tariff Schedule. Tariffs applicable as of January 1, 2006 can be found in Official Journal L 286 and can be accessed through our website at <http://www.useu.be/agri/customs.html>. Chapter 3 of the EU Tariff Schedule relates to fresh, chilled and frozen fish; chapter 16 to processed fish products.

The U.S. has reached an agreement with the EU on an enlargement compensation package. On May 1, 2004, the EU expanded with 10 new member states. The agreement consists of a comprehensive package of EU trade concessions to compensate the U.S. for tariff increases that the EU has implemented as a result of enlargement. One of the key elements in the agreement is that the EU will permanently reduce the tariffs on hake, Alaska Pollack and surimi. The agreement is subject to approval by the EU member states and is expected to go into effect during 2006.

Quotas

As part of the EU's reform of the Common Market Organization in fishery and aquaculture products, autonomous tariff quotas were opened for the period 2001-2003 (Council

Regulation 2803/2000). In order to ensure continuation of supplies for the processing industry, the Commission adopted a successor quota regime for the period 2004-2006 (Council Regulation 379/2004). The in-quota tariff only applies when the customs value of the imported product is at least equal or higher than the reference price fixed by the EU (Commission Regulation 2178/2005 fixing the reference prices for 2006).

Description	Quota Quantity	Rate of Duty (%)
Cod livers and fish livers of the species <i>Boreogadus saida</i> , fresh or chilled, for processing	300	0
Cod and fish of the species <i>Boreogadus saida</i> , salted or in brine, for processing	10 000	0
Tubes of squid, frozen, with skin and fins, for processing	30 000	3.5
Squid, frozen whole, tentacles and fins, for processing	1 500	3
Herrings, excl. livers and roes, for processing	20 000	0
Loins of tunas and skipjack, for processing	4 000	6
Herrings, spiced and/or vinegar-cured, in brine, for processing	6 000	6
Shrimps and prawns of the species <i>Pandalus borealis</i> , cooked and peeled, for processing	7 000	6
Cod, excl. livers and roes, fresh, chilled or frozen, for processing	50 000	0
Hake, frozen, for processing	20 000	0
Blue grenadier, fillets and other meat for processing	15 000	0
Rock lobster, frozen for processing	1 500	6
Southern blue whiting, frozen fillets and other meat for processing	2 000	0
Alaska Pollack, frozen for processing	10 000	0
Anchovies, salted or in brine, for processing	2 000	0
Surimi, frozen, for processing	30 000	0

Under the Uruguay Round Agreement, the EU agreed to open tariff quotas for certain commodities. The table below shows the WTO quotas for fish, as published in Annex 7 to the EU's 2006 Tariff Schedule (Commission Regulation 1719/2005):

Description	Quota Quantity (MT)	Rate of Duty (%)
Tunas (for the canning industry)	17 250	0
Herrings	34 000	0
Silver hake	2 000	8
Fish of the genus <i>Coregonus</i>	1 000	5.5
Fish of the genus <i>Alloctytus</i> and of the species <i>Pseudocytus maculates</i>	200	0
Cod of the species <i>Gadus morhua</i> and <i>Gadus ogac</i>	25 000	0
Shrimps of the species <i>Pandalus borealis</i> , shelled, boiled, frozen, but not further processed	500	0

MARKETING**LABELING****Retail**

[Regulation 2065/2001](#) establishes labeling requirements for fresh, chilled or frozen fishery and aquaculture products (products under Chapter 3 of the EU Tariff Schedule) intended for the retail sector. Information concerning the commercial designation, the production method and the catch area must be provided on the label, on the packaging or by means of a commercial document accompanying the product. The regulation can be downloaded from our website at <http://www.useu.be/agri/seafood2.html>.

Allergen Labeling

Processed products must comply with the EU's general food labeling directive 2000/13/EC. Directive 2003/89/EC, an amendment to this directive, makes the labeling of potential allergens mandatory. The list of 12 groups of potential allergens established by the directive includes fish and products thereof and crustaceans and products thereof. Food manufacturers must indicate the source allergen on the label if it is used as an ingredient at any level in pre-packed foods. The allergen labeling rules entered into force on November 25, 2005. Products not complying with the new legislation are prohibited for sale in the EU. More information on food labeling can be found on our website at <http://www.useu.be/agri/label.html>.

Eco-labeling

In June 2005, the European Commission presented a "Communication" designed to launch a debate on the eco-labeling of fisheries products. Supermarkets chains and trading companies are increasingly interested in food products that are labeled as environmentally responsible. As a result, there is proliferation of private initiatives but the reliability of the environmental claims is not always easy to establish. The Commission is presenting three possible options in its Communication: non-action, creating a single Community eco-labeling scheme or establishing minimum requirements for voluntary eco-labeling schemes. For more information see [GAIN report E35221](#) "Eco-Labeling Scheme for Fisheries Products". The report can also be accessed through our website at <http://www.useu.be/agri/seafood.html>.

PACKAGING

Council Regulation 1935/2004 establishes requirements for materials and articles intended to come into contact with food. It allows the introduction of "active" and "intelligent" packaging and sets out the main requirements for their use. More information on packaging can be found on our website at <http://www.useu.be/agri/packaging.html>.

CONSUMPTION

Per Capita Supply – All Fishery Products (kg/head/year)			
EU- 15	2000	New Member States	2000
Belgium/Luxembourg	21.1	Czech Rep.	10.6
Denmark	23.3	Estonia	17.1
Germany	11.8	Cyprus	24.9
Greece	22.1	Latvia	13.2

Spain	43.3	Lithuania	36.7
France	29.3	Hungary	4.2
Ireland	13.9	Malta	30.2
Italy	22.6	Poland	9.6
Netherlands	22.3	Slovenia	6.5
Austria	10.1	Slovak Rep.	6.9
Portugal	54.5		
Finland	30.0		
Sweden	25.3		
U.K.	19.7		
EU-15			23.7
EU-25			21.5

Source: Eurostat

CY 2000 data are the most recent consumption figures available from the European Commission. Consumption varies greatly across the EU with per capita consumption ranging from 4 kg to 55 kg. Consumption is the highest in Mediterranean countries Spain and Portugal and the lowest in the land-locked new member states Hungary, Slovak Republic and Slovenia.

In the context of Seafoodplus, European researchers are conducting a study to find out what influences seafood consumption and how consumption may be increased. Five thousand Europeans are participating in a study to map consumption habits and attitudes to seafood. The study is taking place in Poland, Denmark, Belgium, The Netherlands and Spain. The main objective of the study is to discover what the motives and barriers are for seafood consumption, cross-cultural variations in Europe, attitudes and preferences in relation to seafood, and the link of these aspects to lifestyles, perceived health and well-being from a consumer point of view. The study is part of a EUR 26 million Seafoodplus project, the largest research program on seafood ever carried out by the EU and involving 70 research institutes. Seafoodplus is an integrated research project supported by the EU and has 70 partners in 16 countries.

TRADE – GENERAL

The EU is the world's biggest importer of fish, seafood and aquaculture products and has one of the world's highest trade deficits in fish and fishery products. In CY 2004, EU imports of fish and fishery products totaled EUR 12 billion while exports totaled EUR 2 billion, a trade deficit of EUR 9 billion. In terms of volume, the EU imported 4.2 million MT of fish and fishery products and exported 1.7 million MT, a deficit of 2.5 million MT. Norway remains the main supplier of fish and fishery products to the EU, accounting for 19.8% of total EU imports in terms of volume. The other major suppliers ranked in descending order of importance were Iceland, China, U.S., Argentina, Morocco, Thailand, Russia, Faroe Isles and India. The EU's main export destinations were Nigeria, Russia, China, Egypt, Japan, Ivory Coast, Seychelles, Thailand, U.S. and Morocco.

TRADE – EU/WORLD

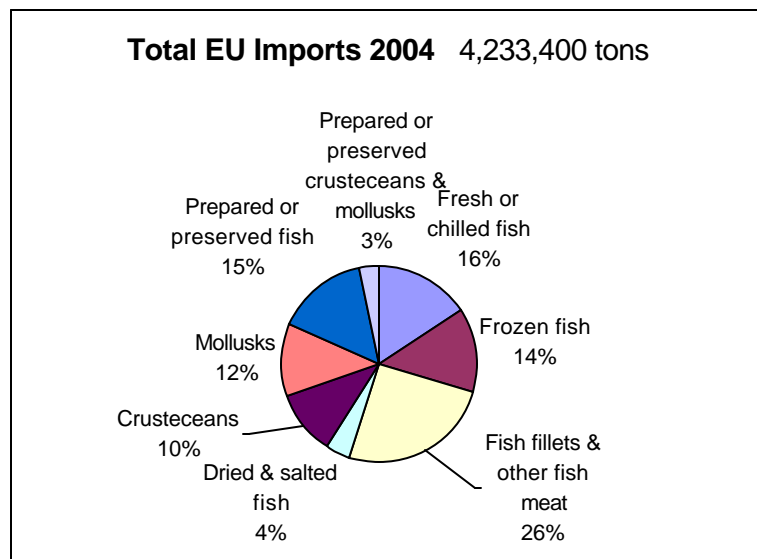
In CY 2004, total EU imports of fishery products amounted to EUR 4.2 million MT, a 7.7% increase in terms of volume compared to 2003. The deplorable state of certain EU fishery stocks and the reduction in annual catch quotas make the EU more and more dependent on imports from third countries for its processing industry. In CY 2004, 82% of total EU fish imports were non-processed fishery products. Products under HS code 0304 "fish fillets and

other fish meat" account for 25% of total EU fish imports. In this category, 13% of total EU imports originated in the U.S.

Accounting for 22% of total EU imports, Spain is the major importing member state. Spain mainly imports crustaceans/mollusks and frozen fish. Other major importing states are Denmark (12.6%) mainly importing fresh or chilled fish, United Kingdom (12%) mainly importing prepared fish and fish fillets, Germany (9.5%) mainly importing fish fillets and Italy (8.7%) mainly importing crustaceans/mollusks.

TOTAL EU IMPORTS, BY HS-CODE, CY 2004			
HS Code	Description	Metric Tons	1000 EUR
0302	Fresh or chilled fish	659 769	1 697 291
0303	Frozen fish	596 283	1 030 590
0304	Fish fillets & other fish meat	1 077 487	2 801 768
0305	Dried & salted fish	161 921	760 241
0306	Crustaceans	438 729	2 207 686
0307	Mollusks	525 351	1 345 971
1604	Prepared or preserved fish	627 309	1 497 861
1605	Prepared or preserved crustaceans & mollusks	146 551	676 049
Total		4 233 400	12 017 457

Source: Eurostat

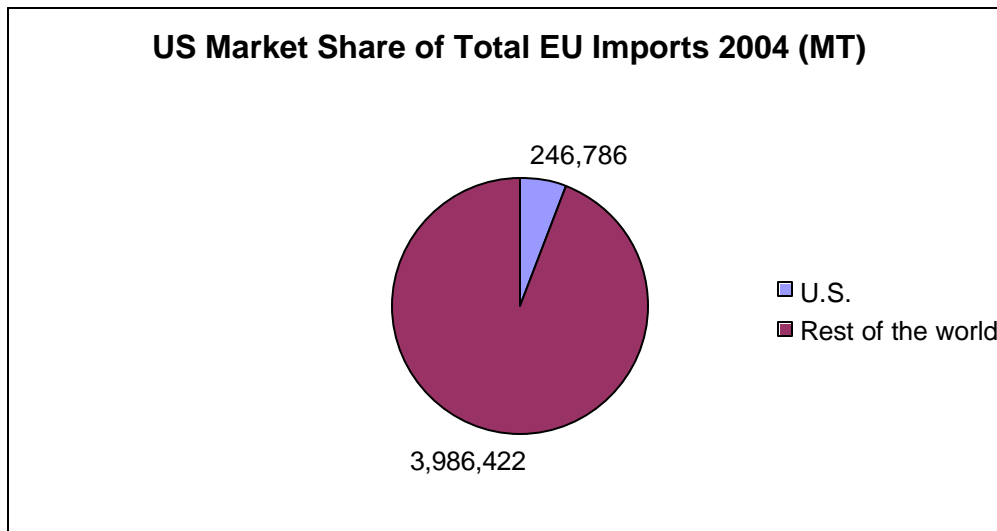


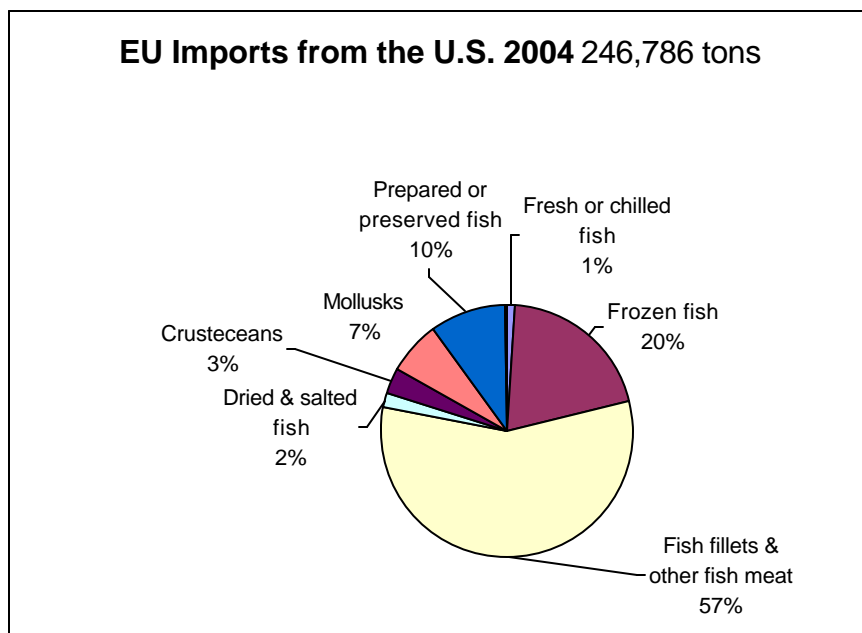
TRADE – EU/US

In terms of volume, 5.8% of the EU's total imports of fish and fishery products came from the U.S (4.3% in CY 2003). The EU imported 246,786 MT of fish and fishery products from the U.S., with a value of EUR 594 million. With 13% market share, products under HS heading 0304 "fish fillets and other fish meat" are the most significant. In this category, imports of frozen fillets of Alaska Pollack accounted for 59%.

U.S. MARKET SHARE OF TOTAL EU IMPORTS, CY 2004 – Metric Tons				
HS Code	Description	Imports from all third countries	Imports from U.S.	% Share
0302	Fresh or chilled fish	659 769	3 483	0.5
0303	Frozen fish	596 283	49 404	8.3
0304	Fish fillets & other fish meat	1 077 487	139 429	13
0305	Dried & salted fish	161 921	5 264	3.3
0306	Crustaceans	438 729	7 655	1.7
0307	Mollusks	525 351	16 955	3.2
1604	Prepared or preserved fish	627 309	24 247	3.9
1605	Prepared or preserved crustaceans & mollusks	146 551	349	0.2
Total		4 233 400	246 786	5.8

Source: Eurostat





In CY 2004, the major EU importers of U.S. fishery products are Germany (26% of total EU imports from the U.S.), France (16.4%), United Kingdom (13%), Spain (11%) and Netherlands (10%).

EU IMPORTS OF U.S. FISHERY PRODUCTS, BY MEMBER STATE (Metric Tons) – CY 2004	
HS Chapters 0302 + 0303 + 0304 + 0305 + 0306 + 0307 + 1604 + 1605	
Germany	65 484
France	40 545
United Kingdom	32 354
Spain	27 289
Netherlands	25 112
Portugal	14 892
Italy	7 485
Poland	7 109
Denmark	7 044
Lithuania	5 298
Belgium	4 426
Sweden	3 315
Greece	1 902
Estonia	1 595
Czech Republic	1 547
Ireland	444
Slovakia	385
Latvia	279
Hungary	93
Malta	76
Slovenia	45
Finland	40
Cyprus	15
Austria	10
Luxembourg	3
EU-25	246 786

Source: Eurostat

MAIN U.S. FISH & FISHERY PRODUCTS - BY MAJOR IMPORTING EU MEMBER STATES – CY 2004				
Product	CN Code	Member State	Volume (MT)	Value (1,000 EUR)
Frozen fillets of Alaska Pollack	03042085	Germany	51 171	89 079
		Netherlands	13 185	23 518
		France	9 996	17 742
		U.K.	7 709	15 117
Live lobsters	03062210	U.K.	2 854	34 018
		France	1 738	20 464
		Spain	1 685	19 382
Frozen cod	03036090	Portugal	7 708	17 364
		Spain	3 177	6 562
Frozen salmon	03031900	France	5 026	7 876
		Germany	3 480	7 961
Frozen surimi	03049005	France	8 215	10 830
		Spain	4 603	6 971
Cod (dried/salted/smoked)	03056200	Portugal	3 895	11 383
Fish meat of Alaska Pollack	03049061	Germany	4 416	4 454
Frozen whole albacore	03034111	Spain	5 994	10 346

Source: Eurostat

TOTAL EU IMPORTS OF U.S. FISH & FISHERY PRODUCTS – BY CATEGORY – CY 2004		
Category	Metric Tons	Value (1,000 EUR)
Salmon	17 997	36 465
Canned Salmon	22 513	65 729
Groundfish	20 269	44 082
Groundfish Fillets	98 048	170 745
Flatfish	189	1 224
Lobster	7 518	88 890
Squid / Cuttlefish	10 152	15 410

Source: Eurostat

In calendar year 2004, the U.S. was one of the major suppliers to the EU of canned salmon, groundfish fillets and lobster. EU imports from the U.S. and its share of total EU imports were as follows: salmon 17,997 MT (5%), canned salmon 22,513 MT (67%), groundfish 20,277 MT (6%), groundfish fillets 98,048 MT (23%), flatfish 336 MT (1%), lobster 7,518 MT (34%), squid/cuttlefish 10,152 MT (4%).

EU imports of U.S. groundfish fillets increased by 56% in CY 2004 compared to 2003. In 2003, U.S. exports of groundfish fillets fell by almost 30% when China resumed its position as leading supplier to the EU when the ban following the detection of the antibiotic chloramphenicol was lifted. In CY 2004, imports from both the U.S. and China increased. Imports from Russia fell by 34% while imports from Chile were almost halved. In this category, frozen fillets of Alaska Pollack is the most important product imported from the U.S. In 2004, 84% of total EU groundfish fillets imports were frozen fillets of Alaska Pollack. Germany was the main destination for frozen Alaska Pollack fillets, with imports amounting to 51,171 MT (52%)

With a market share of 34%, the U.S. is the number two supplier of lobster to the EU with Canada being its main competitor. In terms of volume, EU imports from the U.S. increased by 12% in 2004 compared to 2003. In terms of Euro-value, there was a slight decrease of 3.5%, from EUR 84 million in 2003 to EUR 81 million in 2004 (due to the exchange rate). The U.K, France and Spain were the main importing member states.

Norway dominates the EU market for fresh salmon with a market share of 84%. In October 2004, the European Commission initiated an anti-dumping investigation in response to complaints from member states that prices of Norwegian salmon were significantly undercutting the Community industry prices. Following this investigation, the Commission decided to impose provisional anti-dumping duties in the form of ad valorem duties ranging between 6.8% and 24.5% on imports of farmed salmon from Norway. In July 2005, the Commission changed the form of the provisional measures by replacing the ad valorem duties by a minimum import price of EUR 2.81 per kg whole fish equivalent. In January 2006, Council Regulation 85/2006 was published imposing definitive anti-dumping duties on imports of farmed salmon from Norway. The amount of the definitive anti-dumping duty will be the difference between the minimum import price and the net free-at-Community-frontier price. Regulation 85/2006 can be found at http://europa.eu.int/eur-lex/lex/LexUriServ/site/en/oj/2006/l_015/l_01520060120en00010023.pdf.

SECTION II: STATISTICAL TABLES

EU-15 IMPORTS AND EXPORTS OF FISH AND FISH PRODUCTS: JANUARY - DECEMBER 2004 & 2003 (Source: Eurostat)

Product: Salmon (excl. fillets) (in Metric Tons)					
Destination	Exports from the EU-15		Origin	Imports into the EU-15	
	2004	2003		2004	2003
U.S.	9 623	13 983	U.S.	17 997	18 117
Japan	2 321	3 371	Norway	284 769	271 367
Switzerland	930	802	Faroe Isles	23 504	31 107
China	873	71	Canada	6 131	5 250
Russia	805	523	Iceland	2 102	1 061
Canada	616	1 056	China	486	717
Korea	615	287	Chile	249	318
Lebanon	454	476	Russia	50	125
Ukraine	288	183	Tanzania	46	27
Australia	288	29	Switzerland	32	29
Others	2 154	3 085	Others	189	188
Total third countries	19 048	23 866	Total third countries	335 556	328 304

Product: Canned Salmon (in Metric Tons)					
Destination	Exports from the EU-15		Origin	Imports into the EU-15	
	2004	2003		2004	2003
U.S.	80	48	U.S.	22 513	17 256
Switzerland	70	96	Canada	7 560	8 390
Norway	57	39	Thailand	1 466	1 110
Canada	40	4	Norway	677	581
Hong Kong	37	17	Chile	633	783
New Caledonia	30	1	China	308	193
Iceland	21	-	Korea	92	204
Chile	18	-	Indonesia	92	-
Thailand	12	11	Malaysia	84	47
Serbia & Montenegro	11	-	Iceland	55	58
Others	153	194	Others	34	71
Total third countries	528	412	Total third countries	33 514	28 692

Product: Groundfish (in Metric Tons)					
Destination	Exports from the EU-15		Origin	Imports into the EU-15	
	2004	2003		2004	2003
U.S.	548	317	U.S.	20 277	18 779
China	8 696	6 805	Norway	63 404	66 055
Algeria	1 704	2 783	Russia	60 079	69 591
Russia	1 293	799	Sth Africa	32 710	35 490
Croatia	926	516	Faroe Isles	30 346	35 361
Ukraine	909	1 761	Iceland	28 440	16 939
Serbia & Montenegro	596	-	Namibia	24 675	23 078
Macedonia	539	276	Argentina	22 775	27 528
Bosnia & Herzegovina	501	532	Chile	20 017	19 597
Norway	374	383	Canada	10 363	7 250
Others	2 991	7 752	Others	21 377	20 952
Total third countries	19 077	21 923	Total third countries	334 463	340 621

Product: Groundfish Fillets (in Metric Tons)					
Destination	Exports from the EU- 15		Origin	Imports into the EU-15	
	2004	2003		2004	2003
U.S.	1 988	1 313	U.S.	98 048	62 785
Switzerland	1 256	1 294	China	145 981	141 821
Russia	683	464	Iceland	68 248	53 492
Norway	503	669	Russia	40 457	61 652
China	380	453	Norway	37 681	38 944
Algeria	374	287	Faroe Isles	19 769	18 070
Iceland	328	236	Chile	6 381	12 687
Serbia & Montenegro	143	-	Peru	4 530	1 362
Romania	117	15	Greenland	1 686	1 893
Turkey	87	49	Canada	1 345	1 520
Others	862	1 204	Others	4 018	4 985
Total third countries	6 722	5 983	Total third countries	428 143	399 211

Product: Flatfish (in Metric Tons)					
Destination	Exports from the EU- 15		Origin	Imports into the EU-15	
	2004	2003		2004	2003
U.S.	1 284	1 023	U.S.	336	379
Japan	7 119	7 054	Greenland	12 129	12 985
China	6 986	5 670	Norway	10 382	8 347
Taiwan	6 161	7 189	Morocco	5 747	6 651
Hong Kong	887	1 683	Iceland	3 854	4 241
Ukraine	748	537	Faroe Isles	3 354	4 043
Morocco	686	982	Senegal	2 309	3 608
Korea	479	338	Mauritania	2 116	1 573
Russia	353	406	Russia	1 559	820
Switzerland	177	292	Korea	902	1 167
Others	1 059	1 246	Others	3 275	3 659
Total third countries	25 940	26 417	Total third countries	45 962	47 474

Product: Lobster (in Metric Tons)					
Destination	Exports from the EU-15		Origin	Imports into the EU-15	
	2004	2003		2004	2003
U.S.	196	11	U.S.	7 518	6 734
Japan	294	306	Canada	8 251	7 842
Switzerland	43	48	Cuba	2 299	2 072
Norway	37	28	Bahamas	1 040	1 030
Taiwan	18	4	Sth Africa	481	327
Canada	12	12	Australia	322	259
Croatia	12	6	Morocco	309	250
Tanzania	8	-	El Salvador	226	263
Russia	7	33	Madagascar	182	122
Australia	5	-	Mauritania	158	168
Others	80	162	Others	1 283	1 905
Total third countries	713	610	Total third countries	22 069	20 972

Product: Squid / Cuttlefish (in Metric Tons)					
Destination	Exports from the EU-15		Origin	Imports into the EU-15	
	2004	2003		2004	2003
U.S.	258	152	U.S.	10 152	7 715
Croatia	3 782	4 259	India	59 071	55 621
Sth Africa	1 217	1 146	Thailand	34 039	40 653
Japan	1 070	363	Falkland Islands	27 607	41 806
Thailand	628	35	China	27 135	16 891
Russia	558	438	New Zealand	22 205	12 917
Turkey	518	1 091	Peru	17 199	17 257
Algeria	391	664	Sth Africa	14 237	10 594
Switzerland	373	309	Malaysia	9 621	5 741
Tunisia	367	214	Morocco	9 181	12 399
Others	3 906	5 052	Others	52 845	55 043
Total third countries	13 068	13 722	Total third countries	283 293	276 637

GLOSSARY & SOURCES

CFP	Common Fisheries Policy
CN	Combined Nomenclature (tariff codes)
CY	Calendar Year
DG	Directorate General
EU	European Union
FDA	Food & Drug Administration
HS	Harmonized System (tariff codes)
HACCP Hazard	Analysis and Critical Control Point
ICES	International Council for the Exploration of the Sea
MT	Metric Ton (1000 kg)
NMFS	National Marine Fisheries Service
NOAA	National Oceanic and Atmospheric Administration
STECF	Scientific, Technical and Economic Committee on Fisheries
TAC	Total Allowable Catch
U.K.	United Kingdom
U.S.	United States
VEA	Veterinary Equivalency Agreement
WTO	World Trade Organization
WWF	World Wide Fund for Nature

Exchange Rates:

2004: 1 Euro = 1.2439 U.S. Dollar

2003: 1 Euro = 1.1309 U.S. Dollar

EU Legislation:

The referenced legislation can be downloaded from the Internet at <http://europa.eu.int/eur-lex/lex/en/index.htm>

Sources:

- European Commission: DG Fisheries and Maritime Affairs, DG Health & Consumer Protection
- Eurostat
- SeafoodPlus
- Seafood International
- European Aquaculture Society
- Federation European Aquaculture Producers
- National Marine Fisheries Service

Trade Shows

The annual European Seafood Exposition (ESE) in Brussels, Belgium, is the largest seafood event in the world and attracts buyers from over 130 countries. ESE will take place from May 9-11, 2006. For more information on ESE please visit their website at <http://www.euroseafood.com> or contact Mary Ann Kurvink, Office of Agricultural Affairs, The Hague, the Netherlands, phone (31-70) 310-9299, e-mail agthehague@fas.usda.gov

Visit our website: our website www.useu.be/agri/usda.html provides a broad range of useful information on EU import rules and food laws and allows easy access to USEU reports, trade information and other practical information. Information on seafood can be found at <http://www.useu.be/agri/seafood2.html>. E-mail: AgUSEUBrussels@usda.gov.

Related reports from USEU Brussels:

Report Number	Title	Date Released
E35221	Eco-Labeling Schemes for Fisheries Products	11/18/2005
E35196	Allergen Labeling	10/6/2005
E35131	Ant-dumping duties on imports of salmon from Norway	7/1/2005
E35029	Salmon – Safeguard Measures	2/18/2005
E35171	New EU Proposal on Animal Welfare for Farmed Fish	8/31/2005
E35012	EU Traceability Guidelines	1/21/2005
E34023	Food & Feed Controls	6/18/2004

These reports can also be accessed through our website www.useu.be/agri or through the FAS website <http://www.fas.usda.gov/scripts/attacherep/default.asp>.

Related Reports from EU Member States & Norway:

Report Number	Title	Date Released
NO6001	Hard Times for Norwegian Salmon	1/24/2006
FI5003	Baltic Seafood – Safe to Eat?	12/5/2005
NO5006	Norway – Annual Report	11/29/2005
SP5037 PO5023	Iberian Peninsula – Market Access for Fishery Products	10/21/2005
PO5022	Portugal – Annual Report	10/18/2005
UK5025	United Kingdom – Annual Report	10/6/2005
DA5012	Denmark – Annual Report	10/6/2005
FR5065	France – Annual Report	10/6/2005
GM5036	Germany – Annual Report	9/30/2005
IT5048	WWF Calls for Moratorium in Bluefin Tuna Farming in Mediterranean	5/24/2005
LG5002	Latvia Bans Retail Sale of Baltic Salmon	3/10/2005
NO5005	Norway Launches its First WTO Complaint Against the EU	2/25/2005
EZ4012	Czech Republic - Fish and Seafood Market Brief	2/10/2005
<p>These reports can also be accessed through our website www.useu.be/agri or through the FAS website http://www.fas.usda.gov/scriptsw/attacherep/default.asp.</p>		