



Myanmar – EU Trade Helpdesk



EU Export Market Scan: Frozen Shrimps

Myanmar Frozen Shrimps

Wild caught shrimps from Myanmar waters and extensive aquaculture farming result in the production of high-quality shrimps with a high share of large sizes (20 count and less per pound) produced in an environmentally friendly way.

Specific wild catch offers from Myanmar include pink shrimps (*Metapenaeus Affanis*) and wild sea tiger shrimps (*Penaeus monodon*). In addition, traditional aquaculture “trap and hold” farming methods in Rakhine State and the Ayeyarwady Delta offer eco-friendly and high-quality black tiger shrimps (*Penaeus monodon*), as well as giant freshwater prawns (*Macrobrachium rosenbergii*).

Myanmar black tiger shrimps



Source: Shwe Yamone company

Frozen shrimps can be presented in all commercial forms and sizes. The most common type in Myanmar is Headless Shell-On (HLSO).

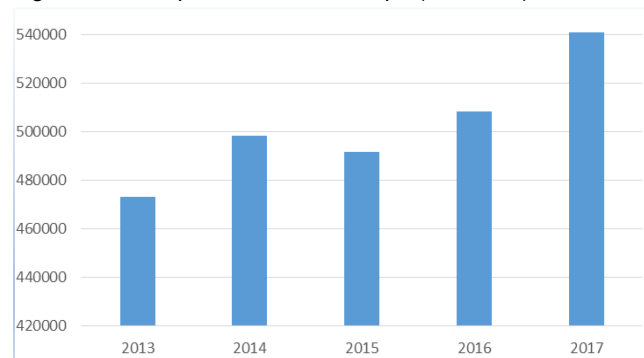
Frozen Shrimps in the EU

Imports of frozen shrimps by the European Union (EU) represent around one-third of total world imports. Total EU imports of frozen shrimps have shown a stable increase in the last three years, reaching 540,000 tonnes and EUR 4.2 billion in 2017.

EU imports of frozen shrimps are increasing at an average annual rate of 3% in quantity and 9% in value, indicating an increase of import prices over the last few years. Continued economic growth in the EU is expected to lead to an increase in imports of frozen shrimps, with especially high import growth rates in

Central and Eastern EU countries in the next five years.

Figure 1: EU import of frozen shrimps (in tonnes)



Source: International Trade Centre (ITC) Trade Map, 2018

The EU does not produce the tropical types of frozen shrimps that are characteristic for Myanmar, but only limited quantities of cold-water shrimps. Therefore, all trade of tropical shrimps within the EU is imported and destined mainly for the EU’s domestic market.

Consumption of tropical shrimps in the EU is 0.67 kg per capita. It shows a slight decrease of around 3% in the last three years leading up to 2017.

Potential Target Markets in the EU

The EU market for frozen shrimps is concentrated, with Spain and France together representing almost half of total imports in quantity. Although being the largest EU Member State by population, Germany imported only around 5% of the EU’s total import quantity of frozen shrimps in 2017.

The best potential EU markets differ according to the types of shrimps offered. Markets for black tiger shrimps can be found anywhere in the EU, but the largest sourcing countries are the United Kingdom (UK), Belgium, the Netherlands, and Germany. Belgium and the Netherlands are also interesting markets for wild caught pink shrimps, while the UK is an interesting market for freshwater shrimps.

Opportunities for Myanmar exist in food service segments of large markets. Retail segments in Spain and Italy are price-sensitive and search for cheap South American white-leg shrimps.

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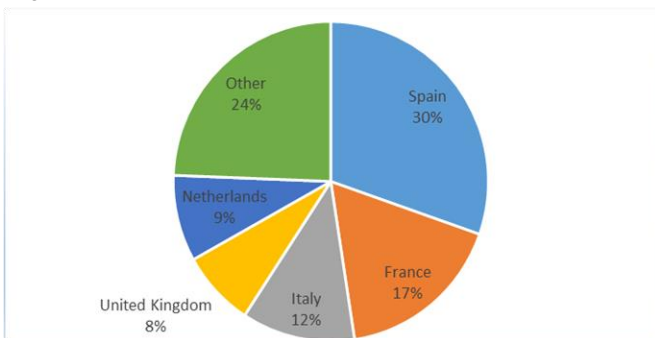




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Figure 2: EU frozen shrimps import structure in 2017



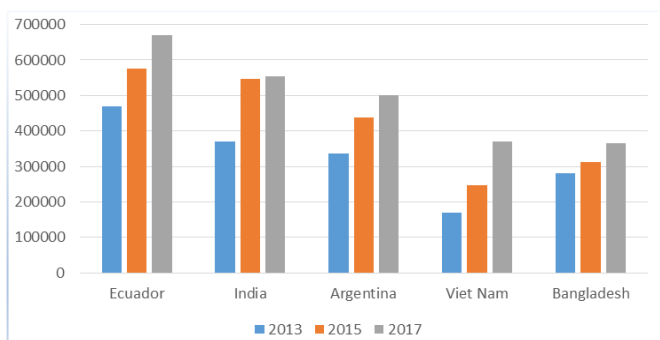
Source: International Trade Centre (ITC) Trade Map, 2018

Myanmar frozen shrimps could also be offered to emerging markets such as Greece, Romania, Bulgaria, and the Czech Republic. Although those markets are smaller than the markets reflected in Figure 2, they have less concentrated competition. This offers opportunities for new suppliers. Due to limited demand, they may be willing to buy combined containers, which is common for Myanmar offers.

EU Market Characteristics

Spain, Italy, and France are increasingly sourcing white-leg shrimps (*Litopenaeus vannamei*) from South American origins. Currently, import and consumption of black tiger shrimps is decreasing for the benefit of white-leg shrimps, which are much cheaper. Shrimp consumers still prefer the quality of black tiger over white-leg shrimps, however, the significant price difference prevents high purchasing of black tiger shrimps. Belgium, the Netherlands, and the UK are the most stable markets for black tiger shrimps.

Figure 3: Leading suppliers of frozen shrimps to the EU (in EUR thousand)



Source: International Trade Centre (ITC) Trade Map, 2018

Italy and Spain are large but traditional markets. However, potential for innovative value-added

products is generally higher in the UK, the Netherlands, Belgium, and Germany.

EU Market Access Requirements

- Fishery products must be caught by approved vessels (wild catch) or produced in registered farms (aquaculture).
- Fishery products must be accompanied by proper health certificates.
- Possible contamination by antibiotics is currently the most important concern. This is due to recent negative attention in the EU caused by bad shipments from e.g. India.
- Concerning the EU retail market segment, food safety certifications such as BRC (British Retail Consortium) or IFS (International Featured Standard) is increasingly requested.
- Sustainability certification, such as ASC (Aquaculture Stewardship Council) or MSC (Marine Stewardship Council) is becoming increasingly important for the shrimp sector.

How to Find Buyers in the EU?

You can search and find potential buyers in the EU via several sources, such as:

- **Trade Fairs:** [Seafood Expo Global](#) (annual, Belgium, China, US), [Conxemar](#) (annual, Spain), [Fish International](#) (biannual, Germany), [Anuga](#) (biannual, Germany), [SIAL Paris](#) (biannual, France)
- **Member lists of associations:** [Seafood Importers & Processors Alliance \(SIPA\)](#), [EU Fish Processors and Traders Association \(AIPCE-CEP\)](#)
- **Fishery data bases:** [GLOBEFISH](#), [Sea-Ex](#), [FIS](#), [STIP](#), [Europages](#)

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