

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## **Estonia**

**Post:** Warsaw

### **Fish and Seafood Market in Estonia.**

**Report Categories:**

Fishery Products

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**Report Highlights:**

In 2015 the total fish catch in Estonia was 72,896 MT, which included the Baltic Sea, long-distance and inland fisheries. The majority of Estonian supplies of fish originate from the Baltic Sea catch. In Estonia there are 83 fish processing plants producing for the domestic and export markets. Estonia imports mainly raw fish used by the local industry for further processing.

**General Information:**

## Production

### Fishing sector

In 2015 the total fish catch was 72,896 MT, which included the Baltic Sea, long-distance and inland fisheries. Fish catch in 2015 was seven percent higher than in 2014, because of higher Baltic Sea catch, which makes 81 percent of the total fish harvest. The main long-distance activity areas were in the Southeastern Atlantic and Northeastern Atlantic fishing grounds.

#### Fish catch by fishing ground (000 MT)

|            | 2010   | 2011   | 2012   | 2013   | 2014   | 2015   |
|------------|--------|--------|--------|--------|--------|--------|
| Baltic Sea | 79,572 | 63,352 | 52,213 | 54,558 | 54,627 | 59,327 |
| Atlantic   | 12,843 | 14,590 | 11,990 | 11,955 | 10,850 | 10,995 |
| Inland     | 2,769  | 2,650  | 2,968  | 2,850  | 2,847  | 2,574  |
| Total      | 95,184 | 80,592 | 55,181 | 69,363 | 67,964 | 72,896 |

Source: Statistical Office of Estonia

Almost 80 percent of the fish from the Baltic Sea is harvested by trawling vessels. The Baltic Sea fishery is divided into the open sea fishery using trawlers and the coastal fishery. There are about 50 vessels in the Baltic Sea fishery employing around 500 fishermen. The three most important species of commercial fish in the Baltic Sea are the Baltic herring, sprat and European perch. In 2015 the catch of herring, sprat, European Perch and cod in Baltic Sea amounted to 32,317 MT, 23,954 MT, 1,523 MT and 183 MT, respectively. Sprat and herring are landed mainly at Estonian ports where the catch is sold to fish freezing or processing companies. In 2015 harvest of flounder and European smelt amounted to 239 MT and 435 MT, respectively. There are about 600 vessels in the coastal fishing fleet and around 2,500 fishermen, however, fishing is only a part-time occupation for most of them. In 2015 the total catch from Atlantic Ocean was 10,995 MT, a one percent increase compared to the previous year.

Estonian vessels operate in the Northwestern, Southwestern and Northeastern parts of the Atlantic Ocean. Northern prawn is the main shrimp caught, accounting for 6,651 MT in 2015, over a 1,000 MT increase compared to 2014. Besides Northern prawn, the Atlantic redfish (1,512 MT), American plaice (537 MT), Atlantic cod (989 MT) and Greenland halibut (694 MT) were also harvested in 2015. In 2015 the catch volume from inland waters amounted to 2,574 MT. The inland waters catch has been stable for the last decade. The main species caught from inland waters are perch, freshwater bream, pikeperch and eel, however, eel is the most valuable among them. Around 420 fishermen are employed in the inland fishery sector, most of them part time.

### Aquaculture

Aquaculture production in Estonia focuses up on fish and crayfish farming. In 2015 the total harvest of aquaculture production amounted to 798 MT (live weight) and was 11 percent lower than in 2014.

Rainbow trout and carp are the main species produced by Estonian fish farms. In 2015 production of rainbow trout amounted to 559 MT. In 2015 only 0.6 MT of crayfish was produced in Estonian aquaculture farms. In 2015 production of caviar from aquaculture was 7.3 MT, as compared to 3.1 MT

in 2014. There are 20 commercial companies involved in fish farming. The sector employs only about 100 people.

### **Production of fish and seafood products in aquaculture farms (MT)**

|               | <b>2011</b> | <b>2012</b> | <b>2013</b> | <b>2014</b> | <b>2015</b> |
|---------------|-------------|-------------|-------------|-------------|-------------|
| Rainbow trout | 334.0       | 455.3       | 465.5       | 569.6       | 559.0       |
| Carp          | 38.0        | 38.2        | 43.7        | n/a         | n/a         |
| Crayfish      | 0.6         | 0.1         | 0.4         | 0.2         | 0.6         |
| Pike          | 0.1         | 0.1         | 0.1         | 0           | 0           |
| European eel  | 2.0         | n/a         | n/a         | 127         | n/a         |
| Other         | 18.0        | 87.1        | 223.5       | 172.1       | 238.7       |
| Total         | 392.7       | 580.7       | 733.2       | 868.9       | 798.3       |

*Source: Statistical Office of Estonia*

### **Processing**

The output of the Estonian fish processing industry includes block frozen small pelagic fish, canned products, as well as smoked and marinated fish. Most value is created from the processing of Baltic sprats and herrings. Processed fish products are mostly exported: frozen and salted products to Eastern markets and perch and pikeperch fillets to Western markets. Estonian coastal fishing provides reasonably large volumes of freshwater fish like perch, pikeperch and pike. There are about 83 companies in Estonia whose main business is the processing and canning of fish, crustaceans and molluscs. The industry is dominated by Estonian companies with the exception of a plant owned by the Lithuanian company Viciunai. This plant imports white fish and Alaska Pollock from the U.S. and produces fish fingers.

### **Manufacture of fish products (MT)**

|                     | <b>2011</b> | <b>2012</b> | <b>2013</b> | <b>2014</b> | <b>2015</b> |
|---------------------|-------------|-------------|-------------|-------------|-------------|
| Total fish products | 60,600      | 76,100      | 70,700      | 67,406      | 63,603      |

*Source: Statistical Office of Estonia*

There is a growing number, and importance, of large, horizontally and vertically integrated companies, with direct ownership of all production activities. Vertical integration is very common in the Baltic Sea trawl fisheries (sprat and Baltic herring) and in the Lake Peipsi fisheries (perch and pikeperch) in the sense that processing or fishing companies own the quotas, hire external fishermen, process the raw material and manage trade relations, including export. The quotas are set based on advice from research institutes that study the lake and make recommendations. One of the largest companies fishing at Lake Peipsi is the Peipsi Grupp Holding, which holds one third of the total Lake Peipsi quotas. These vertically integrated companies export almost 100 percent of their production.

The Estonian Association of Fishery has 35 members. The fish processing plants which belong to the Association produce 85 percent of the total output of fish products in Estonia.

## Consumption

According to the Statistical Office of Estonia in 2012 (data for 2013, 2014 and 2015 are not available yet) the average annual fish consumption amounted to 9.6 kilograms per capita. Herring and mackerel are the most popular saltwater species, while trout and carp are the most popular freshwater species. Pollock and salmon are gaining popularity in the market, indicating a structural change in consumption. Consumption of Pollock is growing due to relatively low prices compared to other fish. Fish is traditionally an important part of the daily diet in Estonia.

## Distribution

Seafood is sold in stores ranging from specialized stores, supermarkets, hypermarkets to small independent grocers. Many hypermarkets also feature extensive displays for fresh seafood products including live fish (in tanks) for purchase. Small independent grocers typically lack fresh options but instead offer processed, brand labeled options or frozen filets frequently with no brand association.

## Trade

Estonia is a net exporter of fish and seafood products. The positive trade balance for fishery and seafood products in 2015 was U.S. \$34 million.

### Imports

In 2015 Estonia imported 45,411 MT of fish and seafood for a value of U.S. \$155 million, a 21 percent decrease in comparison to 2014. Latvia, Sweden and Finland were the major suppliers of fish to Estonia in 2015. Estonia imported over 60 percent of total imports of fish and seafood products from these three countries. In the first ten months of 2016 the volume of imports decreased by 21 percent because of reduced imports of Atlantic salmon from Sweden and Latvia.

### Value of Imports of Fish and Seafood Products to Estonia

| Partner Country      | Thousands of United States Dollars |         |         | % Share |        |        | % Change  |
|----------------------|------------------------------------|---------|---------|---------|--------|--------|-----------|
|                      | 2013                               | 2014    | 2015    | 2013    | 2014   | 2015   | 2015/2014 |
| World                | 205,131                            | 195,486 | 155,109 | 100.00  | 100.00 | 100.00 | - 20.66   |
| Latvia               | 87,098                             | 39,169  | 37,794  | 42.46   | 20.04  | 24.37  | - 3.51    |
| Sweden               | 14,830                             | 49,199  | 35,633  | 7.23    | 25.17  | 22.97  | - 27.57   |
| Finland              | 25,765                             | 29,364  | 20,519  | 12.56   | 15.02  | 13.23  | - 30.12   |
| Lithuania            | 21,834                             | 20,980  | 17,756  | 10.64   | 10.73  | 11.45  | - 15.36   |
| Denmark              | 13,077                             | 10,964  | 8,300   | 6.38    | 5.61   | 5.35   | - 24.29   |
| Russia               | 4,294                              | 3,436   | 4,560   | 2.09    | 1.76   | 2.94   | 32.71     |
| Germany              | 3,319                              | 3,210   | 3,869   | 1.62    | 1.64   | 2.49   | 20.55     |
| <i>United States</i> | 5,313                              | 5,450   | 3,409   | 2.59    | 2.79   | 2.20   | - 37.44   |
| France               | 2,308                              | 1,859   | 2,724   | 1.12    | 0.95   | 1.76   | 46.53     |

|                |       |       |       |      |      |      |         |
|----------------|-------|-------|-------|------|------|------|---------|
| Norway         | 2,623 | 4,377 | 2,329 | 1.28 | 2.24 | 1.50 | - 46.78 |
| Netherlands    | 1,832 | 2,008 | 1,619 | 0.89 | 1.03 | 1.04 | - 19.39 |
| Czech Republic | 212   | 375   | 1,612 | 0.10 | 0.19 | 1.04 | 329.33  |
| Poland         | 2,245 | 1,791 | 1,605 | 1.09 | 0.92 | 1.03 | - 10.41 |
| Canada         | 2,533 | 2,985 | 1,545 | 1.23 | 1.53 | 1.00 | - 48.25 |

Source: Global Trade Atlas

The Russian import ban is one of the major reasons for reduced imports of frozen Atlantic salmon in 2015 and for the first ten months of 2016. Import of fresh and chilled herrings was also reduced because of lower demand from Russia. In 2015 imports of Alaska Pollock (except fillets) were 41 percent higher in comparison to 2014 level due to higher demand by the domestic market and positive perception by consumers.

### Volume of Imports of Fish and Seafood Products to Estonia

| Commodity               | Description  | Quantity |        |        | % Change  |
|-------------------------|--|----------|--------|--------|-----------|
|                         |  | 2013     | 2014   | 2015   | 2015/2014 |
| Fish & Seafood Products |  | 59,819   | 54,923 | 45,411 | -17       |
| 030214                  | Atlantic Salmon and Danube Salmon Fresh or Chilled | 8,513    | 10,264 | 11,129 | 8         |
| 030243                  | Sardines Sardinella Brislings/Sprats Fresh/Chilled | 5,716    | 3,176  | 4,099  | 29        |
| 030313                  | Atlantic Salmon and Danube Salmon, Frozen          | 6,231    | 6,945  | 3,148  | -55       |
| 030351                  | Herrings, Frozen, Except Fillets, Livers and Roes  | 2,503    | 4,213  | 3,071  | -27       |
| 030211                  | Trout (Salmo Trutta, Etc) Fresh, Chilled,          | 2,204    | 2,883  | 2,805  | -3        |
| 030494                  | Alaska Pollock, Frozen, except Fillets             | 969      | 1,551  | 2,186  | 41        |
| 160412                  | Herrings Prep Or Pres, Whole or in Pieces          | 2,191    | 2,136  | 2,154  | 1         |
| 030499                  | Fish Meat, Frozen, Except Steaks and Fillets       | 2,956    | 1,999  | 2,086  | 4         |
| 160420                  | Fish, Prepared or Preserved                        | 1,480    | 1,462  | 1,507  | 3         |
| 030616                  | Cold-Water Shrimps and Prawns, Frozen              | 2,268    | 2,213  | 1,335  | -40       |
| 030495                  | Fish Of Families Bregmacerotidae etc, Frozen       | 1,081    | 912    | 835    | -8        |
| 030314                  | Trout, Frozen                                      | 935      | 667    | 749    | 12        |
| 030241                  | Herrings, Fresh or Chilled                         | 4,939    | 3,517  | 721    | -80       |
| 030474                  | Hake Fillets, Frozen                               | 737      | 540    | 630    | 17        |
| 160413                  | Sardines/Sardinella/Brisling Prep/Pres, not Minced | 1,165    | 599    | 574    | -4        |
| 030389                  | Fish, Frozen                                       | 1,562    | 915    | 555    | -39       |
| 030481                  | Pacific, Atlantic and Danube Salmon Fillets Frozen | 1,618    | 950    | 519    | -45       |
| 030462                  | Catfish Fillets, Frozen                            | 780      | 525    | 466    | -11       |
| 160419                  | Fish, Prepared or Preserved, Whole or Pieces       | 380      | 444    | 426    | -4        |
| 030475                  | Alaska Pollock Fillets, Frozen                     | 732      | 736    | 416    | -43       |
| 030353                  | Sardines, Sardinella, Brisling or Sprats, Frozen   | 2,927    | 2,005  | 413    | -79       |
| 030354                  | Mackerel, Frozen                                   | 819      | 551    | 338    | -39       |
| 160414                  | Tunas/Skipjack/Bonito Prep/Pres not Minced         | 220      | 366    | 331    | -10       |
| 160415                  | Mackerel, Prepared or Preserved, Not Minced        | 414      | 283    | 311    | 10        |
| 160554                  | Cuttle Fish And Squid, Prepared or Preserved       | 53       | 217    | 297    | 37        |

|        |   |     |     |     |     |
|--------|---|-----|-----|-----|-----|
| 030486 | Herring Fillets, Frozen                     | 550 | 282 | 245 | -13 |
| 030482 | Trout Fillets, Frozen                       | 434 | 179 | 241 | 34  |
| 030489 | Fish Fillets, Frozen                        | 236 | 221 | 216 | -2  |
| 030449 | Fish Fillets, Fresh or Chilled              | 220 | 185 | 205 | 11  |
| 030289 | Fish, Fresh or Chilled                      | 170 | 268 | 202 | -25 |
| 030442 | Trout Fillets, Fresh or Chilled             | 77  | 63  | 172 | 172 |
| 160521 | Shrimp & Prawns Prep/Preserved not Airtight | 332 | 396 | 162 | -59 |

Source: Global Trade Atlas

In 2015 the value of imports of fish and seafood products from the United States amounted to U.S. \$3.41 million, 37 percent less than in 2014. In the first ten months of 2016 imports from the U.S. decreased by an additional 21 percent because of decreased imports of Alaska Pollock. The major competitor for exports of the U.S. Alaska Pollock is coming from Russia, who has a growing volume of shipments.

### Imports of Fish and Seafood Products from the United States

| Commodity               | Description                                       | U.S. \$000 |       |       | % Change<br>2015/2014 |
|-------------------------|---|------------|-------|-------|-----------------------|
|                         |   | 2013       | 2014  | 2015  |                       |
| Fish & Seafood Products |   | 5,313      | 5,450 | 3,409 | -37                   |
| 160432                  | Caviar Substitutes Prepared From Fish Eggs        | 2,468      | 1,907 | 1,432 | -25                   |
| 030475                  | Alaska Pollock Fillets, Frozen                    | 1,121      | 1,561 | 730   | -53                   |
| 160521                  | Shrimp & Prawns Prep/Preserved not Airtight       | 0          | 266   | 697   | 162                   |
| 030494                  | Alaska Pollock, Frozen, except Fillets            | 1,462      | 1,480 | 488   | -67                   |
| 030319                  | Pacific Salmon, excl. Filet, Liver,Roe, Frozen    | 109        | 83    | 44    | -47                   |
| 030390                  | Fish Livers and Roes, Frozen                      | 0          | 23    | 8     | -65                   |
| 030495                  | Fish Of Families Bregmacerotidae etc, Frozen      | 0          | 129   | 7     | -95                   |
| 030474                  | Hake Fillets, Frozen                              | 0          | 0     | 3     | n/a                   |
| 030489                  | Fish Fillets, Frozen                              | 9          | 1     | 0     | -100                  |
| 030729                  | Scallops Incl Queen, Frozen/Dried/Salted/in Brine | 143        | 0     | 0     | n/a                   |

### Exports

In 2015 Estonia exported U.S. \$189 million in fish and seafood products for, a 22 percent decrease in comparison to the previous year. Major destinations of Estonian fish exports were Finland, Sweden and Germany. In the first ten months of 2016 exports were down 24 percent mainly because of reduced exports to Sweden and Ukraine. However, these reduced exports were partly offset by higher shipments to Belarus. EU countries remain the main destination for these products. In 2015 Estonia exported 65 percent of total fish products to the EU.

### Value of Exports of Fish and Seafood Products from Estonia

| Partner Country | Thousands of United States Dollars |         |         | % Share |        |        | % Change<br>2015/2014 |
|-----------------|------------------------------------|---------|---------|---------|--------|--------|-----------------------|
|                 | 2013                               | 2014    | 2015    | 2013    | 2014   | 2015   |                       |
| World           | 254,716                            | 240,769 | 188,737 | 100.00  | 100.00 | 100.00 | - 21.61               |

|                |        |        |        |       |       |       |         |
|----------------|--------|--------|--------|-------|-------|-------|---------|
| Finland        | 30,164 | 39,186 | 29,968 | 11.84 | 16.28 | 15.88 | - 23.53 |
| Sweden         | 17,358 | 23,601 | 20,272 | 6.81  | 9.80  | 10.74 | - 14.10 |
| Germany        | 28,998 | 36,141 | 19,877 | 11.38 | 15.01 | 10.53 | - 45.00 |
| Ukraine        | 18,201 | 18,570 | 17,295 | 7.15  | 7.71  | 9.16  | - 6.87  |
| Latvia         | 23,725 | 14,549 | 13,756 | 9.31  | 6.04  | 7.29  | - 5.45  |
| France         | 6,713  | 16,439 | 13,505 | 2.64  | 6.83  | 7.16  | - 17.85 |
| Iceland        | 9,094  | 8,583  | 8,710  | 3.57  | 3.56  | 4.61  | 1.48    |
| Switzerland    | 9,139  | 8,961  | 8,675  | 3.59  | 3.72  | 4.60  | - 3.20  |
| Belarus        | 6,421  | 5,224  | 7,737  | 2.52  | 2.17  | 4.10  | 48.10   |
| Lithuania      | 7,291  | 5,434  | 7,432  | 2.86  | 2.26  | 3.94  | 36.76   |
| Denmark        | 9,769  | 4,252  | 5,188  | 3.84  | 1.77  | 2.75  | 22.00   |
| China          | 2,673  | 3,729  | 5,130  | 1.05  | 1.55  | 2.72  | 37.57   |
| Russia         | 21,225 | 18,631 | 3,799  | 8.33  | 7.74  | 2.01  | - 79.61 |
| Norway         | 8,067  | 3,679  | 3,661  | 3.17  | 1.53  | 1.94  | - 0.48  |
| Netherlands    | 3,801  | 5,122  | 2,915  | 1.49  | 2.13  | 1.54  | - 43.10 |
| Serbia         | 2,590  | 3,051  | 2,633  | 1.02  | 1.27  | 1.40  | - 13.70 |
| Moldova        | 2,441  | 2,516  | 2,266  | 0.96  | 1.05  | 1.20  | - 9.96  |
| Poland         | 3,188  | 3,470  | 2,241  | 1.25  | 1.44  | 1.19  | - 35.43 |
| Spain          | 1,367  | 2,803  | 1,688  | 0.54  | 1.16  | 0.89  | - 39.77 |
| United Kingdom | 2,727  | 2,512  | 1,411  | 1.07  | 1.04  | 0.75  | - 43.82 |
| Japan          | 56     | 174    | 1,081  | 0.02  | 0.07  | 0.57  | 521.43  |
| Kazakhstan     | 2,503  | 935    | 1,039  | 0.98  | 0.39  | 0.55  | 11.09   |
| Vietnam        | 656    | 208    | 999    | 0.26  | 0.09  | 0.53  | 379.85  |
| Azerbaijan     | 1,142  | 942    | 833    | 0.45  | 0.39  | 0.44  | - 11.58 |
| United States  | 59     | 582    | 806    | 0.02  | 0.24  | 0.43  | 38.64   |

Source: Global Trade Atlas

### Volume of Exports of Fish and Seafood Products from Estonia (MT)

| Commodity               | Description  | Quantity |         |        | % Change  |
|-------------------------|--|----------|---------|--------|-----------|
|                         |  | 2013     | 2014    | 2015   | 2015/2014 |
| Fish & Seafood Products |  | 112,141  | 104,308 | 98,346 | -5.72     |
| 030351                  | Herrings, Frozen, Except Fillets, Livers and Roes  | 16,767   | 25,011  | 32,914 | 31.6      |
| 030353                  | Sardines, Sardinella, Brisling or Sprats, Frozen   | 41,402   | 28,921  | 17,194 | -40.55    |
| 160413                  | Sardines/Sardinella/Brisling Prep/Pres, not Minced | 9,751    | 11,450  | 10,927 | -4.56     |
| 030313                  | Atlantic Salmon and Danube Salmon, Frozen          | 9,879    | 9,628   | 7,679  | -20.24    |
| 160420                  | Fish, Prepared or Preserved                        | 7,125    | 7,089   | 6,401  | -9.7      |
| 030617                  | Shrimps and Prawns, Frozen                         | 4,643    | 3,310   | 3,264  | -1.41     |
| 030243                  | Sardines Sardinella Brislings/Sprats Fresh/Chilled | 828      | 865     | 2,432  | 181.27    |
| 030499                  | Fish Meat, Frozen, Except Steaks and Fillets       | 680      | 2,016   | 1,961  | -2.72     |
| 030539                  | Fish Fillets Dried Salt in Brine, not Smoked       | 1,120    | 733     | 1,554  | 112       |
| 030389                  | Fish, Frozen                                       | 1,976    | 1,460   | 1,450  | -0.72     |
| 030481                  | Pacific, Atlantic and Danube Salmon Fillets Frozen | 2,008    | 1,629   | 1,393  | -14.48    |
| 160412                  | Herrings Prep or Pres, Whole or in Pieces          | 863      | 792     | 1,272  | 60.69     |

|        |  |       |       |       |        |
|--------|--|-------|-------|-------|--------|
| 160419 | Fish, Prepared or Preserved, Whole or Pieces     | 1,552 | 1,232 | 1,269 | 2.99   |
| 030616 | Cold-Water Shrimps and Prawns, Frozen            | 1,945 | 946   | 750   | -20.68 |
| 030541 | Pacific, Atlantic and Danube Salmon, Smoked      | 1,223 | 650   | 749   | 15.22  |
| 030449 | Fish Fillets, Fresh or Chilled                   | 694   | 690   | 691   | 0.12   |
| 030489 | Fish Fillets, Frozen                             | 633   | 588   | 634   | 7.78   |
| 030543 | Trout, Smoked, Including Fillets                 | 408   | 673   | 617   | -8.38  |
| 030561 | Herrings, Salted, or in Brine, not Dry or Smoked | 234   | 109   | 550   | 404.58 |

Source: *Global Trade Atlas*

Since 1996 Estonia has exported canned fish and fresh water fish to the United States and Canada. However since 2014 there is fast growth of exports of frozen fish fillets to the United States. In 2015 the value of Estonian exports of fish products to the United States amounted to almost U.S. \$806,274, a 39 percent increase compared to 2014. The increase of exports to the United States stemmed from higher sales of fish fillets. For the first ten months of 2016 exports to the U.S. increased by 15 percent because of higher exports of herrings.

### Value of Exports of Fish and Seafood Products to the United States

| Commodity               | Description  | United States Dollars |         |         | % Change 2015/2014 |
|-------------------------|--|-----------------------|---------|---------|--------------------|
|                         |  | 2013                  | 2014    | 2015    |                    |
| Fish & Seafood Products |  | 59,251                | 581,553 | 806,274 | 38.64              |
| 030489                  | Fish Fillets, Frozen                               | 59,251                | 581,553 | 774,046 | 33.1               |
| 160413                  | Sardines/Sardinella/Brisling Prep/Pres, not Minced | 0                     | 0       | 32,227  | n/a                |

Source: *Global Trade Atlas*

### Current Tariff for Seafood Products

Tariffs for seafood products exported to the EU range from zero to 22 percent depending on species, level of processing, and the time of year. Detailed information on seafood tariffs can be found in the official [EU Journal](#) in pages 47-69 and 134-139.

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2012:304:0001:0915:EN:PDF>

### Market Access

A health certificate issued by a government-approved veterinarian from the exporting country must accompany all fish shipments to Estonia. Products packed for retail sale also must bear a label in the Estonian language with the date of production clearly stated. Exporters should also check with Estonian importers regarding standards.

For guidelines regarding seafood exports to Estonia and the EU in general, information is available from the National Oceanic and Atmospheric Association, <http://www.noaa.gov/> or

[http://www.seafood.nmfs.noaa.gov/export/export\\_certification/export\\_certification.html](http://www.seafood.nmfs.noaa.gov/export/export_certification/export_certification.html)

### **Market Entry Strategy**

Trade missions coordinated through industry/export organizations as well as participation in trade shows such as the annual European Seafood Exposition in Brussels are important in gaining knowledge about the market structure, consumer preferences and building contacts with importers. The Fishery Department of the Ministry of Agriculture may also be a partner in a generic promotion of fish products.

U.S. exporters of seafood products may also obtain a list of current importers by contacting the Office of Agricultural Affairs of the U.S. Embassy in Warsaw.

### **Trade Shows and Contact**

European Seafood Exposition, Brussels, Belgium

April 25-27, 2017

<http://www.seafoodexpo.com/global/>

For more information concerning market entry and a current importer list contact:

Office of Agricultural Affairs, Warsaw, Poland

Embassy of the United States of America

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**End of Report.**