

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

**Approved By:**

Russell J. Nicely, Agricultural Attaché

**Prepared By:**

Piotr Rucinski, Agricultural specialist

**Report Highlights:**

In 2014 the total fish catch in Estonia was 67,964 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 2014 the total fish catch was 67,964 MT, which included the Baltic Sea, long-distance and inland fisheries. Fish catch in 2014 was 2 percent lower than in 2013, because of reduced catch in the long-distance fisheries. In 2014 the Baltic Sea catch, which makes 80 percent of the total fish harvest, remained at the previous year's level. The main long-distance activity areas were in the South Eastern Atlantic and North Eastern Atlantic fishing grounds.

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

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

Source: *Statistical Yearbook of Estonia, 2015*

Over 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 cod. In 2014 the catch of herring, sprat and cod in Baltic Sea amounted to 28,498 MT, 23,130 MT and 165 MT, respectively. Sprat and herring are landed mainly at Estonian ports where the catch is sold to fish freezing or processing companies. In 2014 harvest of perch, flounder and European smelt amounted to 1,567 MT, 450 MT and 306 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 2014 the total catch from Atlantic Ocean was 10,850 MT, a 9 percent decrease compared to the previous year. Estonian vessels operate in the North-Western, South-Western and North-Eastern parts of the Atlantic Ocean. Northern prawn is the main shrimp caught, accounting for 5,650 tonnes in 2014, almost a 1,000 MT decline compared to 2013. Besides the Northern prawn, the Atlantic redfish (1,300 MT), American plaice (1,176 MT) and Greenland halibut (1,037 MT) were also harvested in 2014. In 2014 the catch volume from inland waters amounted to 2,847 MT. The inland waters catch has been stable for the last decade. The main species caught from inland waters have been perch, freshwater bream and pike-perch, 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 2013 the total harvest of aquaculture production amounted to 733 tonnes (live weight). Rainbow trout and carp are the main species produced by Estonian fish farms. In 2013 only 0.4 MT of crayfish was produced in Estonian aquaculture farms. In 2013 production of caviar from aquaculture was 5 tonnes, as compared to 4.1 MT

in 2012. 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)

	2011	2012	2013
Rainbow trout	334.0	455.3	465.5
Carp	38.0	38.2	43.7
Crayfish	0.6	0.1	0.4
Pike	0.1	0.1	0.1
European eel	2.0	n/a	n/a
Other	18.0	87.1	223.5
Total	392.7	580.7	733.2

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 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, pike-perch and pike, which are exported to Western markets. 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 Pollack from the U.S. and produces fish fingers.

### Manufacture of fish products (MT)

	2011	2012	2013
Total fish products	60,600	76,100	70,700
Frozen fish	32,800	44,200	40,400
Salted, dried fish or fish in brine	16,500	17,300	14,400
Fresh or chilled fish fillets and other fish meat without bones	2,500	2,600	3,200
Smoked fish	1,900	2,300	2,300
Canned fish	3,800	3,700	3,300
Culinary products from fish	1,300	4,700	4,600

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 fishers, process 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 the lake Peipsi is the Peipsi Group Holding which holds one third of the total Peipsi lake 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. They are planning to attend the 2016 Boston Seafood Show. So far, 6 companies from their association plan to participate in the show. The Association will be interested in organizing a visit of a U.S. fish trade mission to Estonia.

## **Consumption**

According to the Statistical Office of Estonia in 2012 (data for 2013 and 2014 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. Estonian consumers are getting more information about products now, and are benefiting from campaigns promoting consumption and the health benefits of fish and seafood. Estonian consumers are receptive to market promotions. The share of promotional products bought in Estonia is 33 percent.

## **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 2014 was U.S. \$45 million.

### **Imports**

In 2014 Estonia imported 54,853 MT of fish and seafood for a value of U.S. \$195 million. Sweden, Latvia and Finland were the major suppliers of fish to Estonia in 2014. Estonia imported almost 60 percent of total imports of fish and seafood products from these three countries. In the first eight months of 2015 the volume of imports decreased by almost 25 because of reduced imports of frozen salmon from Sweden and United Kingdom.

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

Partner Country	Thousands United States Dollars			% Share			% Change 2014/2013
	2012	2013	2014	2012	2013	2014	
World	164 224	205 131	195 381	100.00	100.00	100.00	- 4.75
EU28	144 301	178 814	165 235	87.87	87.17	84.57	- 7.59
Sweden	12 822	14 830	49 199	7.81	7.23	25.18	231.76
Latvia	66 803	87 098	39 123	40.68	42.46	20.02	- 55.08
Finland	20 825	25 765	29 340	12.68	12.56	15.02	13.88
Lithuania	17 066	21 834	20 968	10.39	10.64	10.73	- 3.97
Denmark	12 841	13 077	10 964	7.82	6.38	5.61	- 16.16
United States	4 735	5 313	5 450	2.88	2.59	2.79	2.58
Norway	2 882	2 623	4 377	1.76	1.28	2.24	66.86
Russia	3 204	4 294	3 436	1.95	2.09	1.76	- 19.99
Iceland	1 955	2 618	3 223	1.19	1.28	1.65	23.10
Germany	3 149	3 319	3 186	1.92	1.62	1.63	- 4.00
Canada	1 279	2 533	2 985	0.78	1.23	1.53	17.85
United Kingdom	1 251	2 298	2 980	0.76	1.12	1.53	29.67
Faroe Islands	180	1671	2583	0.11	0.81	1.32	54.56
Thailand	472	1120	2098	0.29	0.55	1.07	87.31
Netherlands	1612	1832	2008	0.98	0.89	1.03	9.61
France	1926	2308	1859	1.17	1.12	0.95	- 19.43
Poland	864	2245	1791	0.53	1.09	0.92	- 20.24

Source: Global Trade Atlas

The Russian import ban is one of the major reasons for reduced imports of salmon in 2014 and for the first nine months of 2015. Import of fresh and chilled herrings was offset by higher demand for frozen herring. In 2014 imports of Alaska Pollock were 60 percent higher in comparison to 2013 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	Unit	Description	Quantity			% Change 2014/2013
			2012	2013	2014	
Fish & Seafood Products	T		59 713	59 819	54 853	-8.3
030214	T	Atlantic Salmon And Danube Salmon Fresh Or Chilled	5 894	8 513	10 264	20.57
030313	T	Atlantic Salmon And Danube Salmon, Frozen	4 789	6 230	6 886	10.52
030351	T	Herrings, Frozen, Except Fillets, Livers And Roes	2 521	2 503	4 213	68.35
030241	T	Herrings, Fresh Or Chilled	11 798	4 939	3 517	-28.78
030243	T	Sardines Sardinella Brislings/Sprats Fresh/Chilled	5 680	5 716	3 176	-4.43
030211	T	Trout (Salmo Trutta, Etc) Fresh, Chilled, Nesoi	3 651	2 204	2 883	30.82
030616	T	Cold-Water Shrimps And Prawns, Frozen	1 800	2 268	2 213	-2.44
160412	T	Herrings Prep Or Pres, Whole Or In Pieces	2 146	2 191	2 136	-2.53
030353	T	Sardines, Sardinella, Brisling Or Sprats, Frozen	2 084	2 927	2 005	-31.48
030499	T	Fish Meat, Frozen, Except Steaks And Fillets Nesoi	1 756	2 956	1 999	-32.36
030494	T	Alaska Pollock, Frozen, Except Fillets	1 285	969	1 551	60.1
160420	T	Fish, Prepared Or Preserved, Nesoi	1 707	1 480	1 462	-1.22
030481	T	Pacific, Atlantic And Danube Salmon Fillets Frozen	1 005	1 618	951	-41.27

030389	T	Fish, Frozen, Nesoi	1 675	1 562	915	-41.43
030495	T	Fish Of Families Bregmacerotidae Etc, Frozen Nesoi	1 182	1 081	912	-15.67
030475	T	Alaska Pollock Fillets, Frozen	406	732	735	0.42
030314	T	Trout, Frozen	1 215	935	667	-28.74
160413	T	Sardines/Sardinella/Brisling Prep/Pres, Not Minced	1 530	1 165	599	-48.55
030354	T	Mackerel, Frozen	292	819	551	-32.74
030474	T	Hake Fillets, Frozen	596	737	540	-26.68
030462	T	Catfish Fillets, Frozen	231	780	525	-32.65
160419	T	Fish, Prepared Or Preserved, Whole Or Pieces Nesoi	379	380	444	16.8
160521	T	Shrimp & Prawns Prep/Preserved Not Airtight Contr	324	332	396	19.32
160414	T	Tunas/Skipjack/Bonito Prep/Pres Not Minced	204	220	366	66.45
030441	T	Pacific, Atlantic, Danube Salmon Fillet Fresh/Chll	82	378	285	-24.72
160415	T	Mackerel, Prepared Or Preserved, Not Minced	147	414	283	-31.66
030486	T	Herring Fillets, Frozen	154	550	282	-48.79
030543	T	Trout, Smoked, Including Fillets	30	114	278	144.07
030289	T	Fish, Fresh Or Chilled, Nesoi	326	170	268	56.98
030561	T	Herrings, Salted, Or In Brine, Not Dry Or Smoked	133	134	235	75.02
030366	T	Hake, Frozen	480	268	225	-15.85

Source: Global Trade Atlas

In 2014 the value of imports of fish and seafood products from the United States amounted to U.S. \$5.45 million, 3 percent higher than in 2013. In the first nine months of 2015 imports from the U.S. dropped by 60 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. The Estonian processing industry is interested in buying technical equipment from the U.S. and would like to source Alaska salmon white fish and red caviar in big boxes for domestic consumption.

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

Commodity	Description	Thousands United States Dollars			% Change 2014/2013
		2012	2013	2014	
Fish & Seafood Products		4 735	5 313	5 450	2.58
160432	Caviar Substitutes Prepared From Fish Eggs	1 945	2 468	1 907	-22.74
030475	Alaska Pollock Fillets, Frozen	636	1 121	1 561	39.19
030494	Alaska Pollock, Frozen, Except Fillets	1 546	1 462	1 480	1.19
160521	Shrimp & Prawns Prep/Preserved Not Airtight Contr	0	0	266	n/a
030495	Fish Of Families Bregmacerotidae Etc, Frozen Nesoi	223	0	129	n/a
030319	Pacific Salmon, Nesoi, Excl Filet, Liver,Roe, Froz	248	109	83	-23.74
030390	Fish Livers And Roes, Frozen	0	0	23	n/a
030489	Fish Fillets, Frozen, Nesoi	97	9	1	-84.54
030729	Scallops Incl Queen, Frozen/Dried/Salted/In Brine	19	143	0	-100
030351	Herrings, Frozen, Except Fillets, Livers And Roes	19	0	0	n/a

030481	Pacific, Atlantic And Danube Salmon Fillets Frozen	1	0	0	n/a
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Source of Data: Eurostat

## Exports

In 2014 Estonia exported U.S.\$241 million in fish and seafood products for, a 5 percent decrease in comparison to the previous year. Major destinations of Estonian fish exports were Finland, Germany and Sweden. In the first eight months of 2015 exports were down 2 percent mainly because of the 77 percent reduction in exports to Russia. However, reduced exports to Russia were partly offset by higher shipments to Ukraine and Belarus. EU countries remain the main destination for these products. In 2014 Estonia exported 66 percent of total fish products to the EU.

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

Partner Country	Thousands United States Dollars			% Share			% Change 2014/2013
	2012	2013	2014	2012	2013	2014	
World	244 674	254 716	240 769	100.00	100.00	100.00	- 5.48
EU28	150 648	167 864	161 942	61.57	65.90	67.26	- 3.53
Finland	28 951	30 164	39 186	11.83	11.84	16.28	29.91
Germany	20 760	28 998	36 141	8.48	11.38	15.01	24.63
Sweden	18 669	17 358	23 606	7.63	6.81	9.80	35.99
Russia	22 452	21 225	18 631	9.18	8.33	7.74	- 12.22
Ukraine	18 007	18 201	18 570	7.36	7.15	7.71	2.03
France	5 391	6 713	16 439	2.20	2.64	6.83	144.89
Latvia	16 514	23 725	14 548	6.75	9.31	6.04	- 38.68
Switzerland	8 367	9 139	8 961	3.42	3.59	3.72	- 1.94
Iceland	11 479	9 094	8 583	4.69	3.57	3.56	- 5.62
Lithuania	4 540	7 291	5 430	1.86	2.86	2.26	- 25.53
Belarus	6 439	6 421	5 224	2.63	2.52	2.17	- 18.64
Netherlands	2 348	3 801	5 122	0.96	1.49	2.13	34.77
Denmark	10 761	9 769	4 252	4.40	3.84	1.77	- 56.47
Slovakia	27 522	27 636	4 100	11.25	10.85	1.70	- 85.16
China	2 807	2 673	3 729	1.15	1.05	1.55	39.51
Norway	11 726	8 067	3 679	4.79	3.17	1.53	- 54.39
Poland	1 685	3 188	3 470	0.69	1.25	1.44	8.86
Serbia	3 186	2 590	3 051	1.30	1.02	1.27	17.81
United States	279	59	582	0.11	0.02	0.24	881.52

Source: Global Trade Atlas

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

Commodity	Unit	Description	Quantity			% Change 2014/2013
			2012	2013	2014	
Fish & Seafood Products	T		121 441	112 141	104 301	-6.99
030353	T	Sardines, Sardinella, Brisling Or Sprats, Frozen	43 020	41 402	28 922	-30.14
030351	T	Herrings, Frozen, Except Fillets, Livers And Roes	18 422	16 767	25 011	49.17

160413	T	Sardines/Sardinella/Brisling Prep/Pres, Not Minced	12 384	9 751	11 450	17.42
030313	T	Atlantic Salmon And Danube Salmon, Frozen	11 511	9 879	9 627	-2.55
160420	T	Fish, Prepared Or Preserved, Nesoi	7 759	7 125	7 088	-0.52
030617	T	Shrimps And Prawns, Frozen, Nesoi	7 603	4 643	3 310	-28.7
030499	T	Fish Meat, Frozen, Except Steaks And Fillets Nesoi	310	680	2 016	196.62
030481	T	Pacific, Atlantic And Danube Salmon Fillets Frozen	1 801	2 008	1 629	-18.85
030389	T	Fish, Frozen, Nesoi	3 993	1 976	1 460	-26.13
160419	T	Fish, Prepared Or Preserved, Whole Or Pieces Nesoi	867	1 552	1 233	-20.55
030616	T	Cold-Water Shrimps And Prawns, Frozen	2 349	1 945	946	-51.35
030243	T	Sardines Sardinella Brislings/Sprats Fresh/Chilled	355	828	865	4.44
160412	T	Herrings Prep Or Pres, Whole Or In Pieces	1 038	863	792	-8.21
030539	T	Fish Fillets Dried Salt In Brine, Not Smoked Nesoi	471	1 120	733	-34.55
030449	T	Fish Fillets, Fresh Or Chilled, Nesoi	629	694	690	-0.66
030543	T	Trout, Smoked, Including Fillets	239	408	673	65.11
030541	T	Pacific, Atlantic And Danube Salmon, Smoked	1 258	1 223	650	-46.84
030489	T	Fish Fillets, Frozen, Nesoi	452	633	580	-8.38
030482	T	Trout Fillets, Frozen	846	678	576	-15.11
030569	T	Fish Nesoi, Salted Or In Brine, Not Dry Or Smoke	743	580	562	-3.07
030289	T	Fish, Fresh Or Chilled, Nesoi	359	585	505	-13.68
160554	T	Cuttle Fish And Squid, Prepared Or Preserved	418	391	423	8.17
030339	T	Flat Fish Nesoi Except Fillets, Livers, Roes, Frz	150	103	419	306.21
160529	T	Shrimp/Prawns Prep/Preserved In Airtight Container	166	230	409	77.96
160521	T	Shrimp & Prawns Prep/Preserved Not Airtight Contnr	170	156	332	112.91
030363	T	Cod, Frozen	356	311	268	-13.88

Source: Global Trade Atlas

Since 1996 Estonia has exported canned fish and fresh water fish to the United States and Canada. Exports to the U.S. are mostly destined for the Russian diaspora and amounts to 2-3 containers of canned fish per quarter. Exports to Canada amount to 550 MT of fresh water fish per year. In 2014 the value of Estonian exports of fish products to the United States amounted to almost U.S. \$582,000, a 9 fold growth compared to 2013. The increase of exports to the United States stemmed from higher sales of fish fillets. For the first nine months of 2015 exports to the U.S. remained at the previous year's level.

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

Commodity	Description	Thousands United States Dollars			% Change 2014/2013
		2012	2013	2014	
Fish & Seafood Products		279	59	582	881.52
030489	Fish Fillets, Frozen, Nesoi	220	59	582	881.52
030617	Shrimps And Prawns, Frozen, Nesoi	59	0	0	n/a

Source of Data: Eurostat

## **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, [NOAA](#).

<http://www.seafood.nmfs.noaa.gov/Howtoexportseafood2013.pdf>

## **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.

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 26-28, 2016

<http://www.seafoodexpo.com>

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

Mr. Piotr Rucinski

E-mail: [Piotr.rucinski@fas.usda.gov](mailto:Piotr.rucinski@fas.usda.gov)

Or [Agwarsaw@fas.usda.gov](mailto:Agwarsaw@fas.usda.gov)

Tel: (48-22) 504 2349

**End of Report.**