

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY  
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT  
POLICY

Voluntary  Public

**Date:** 1/10/2017

**GAIN Report Number:**

## **Estonia**

**Post:** Warsaw

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

**Report Categories:**

Fishery Products

**Approved By:**

Russ Nicely, Agricultural Attaché

**Prepared By:**

Piotr Rucinski, Agricultural Specialist

**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
<b>Total</b>	<b>392.7</b>	<b>580.7</b>	<b>733.2</b>	<b>868.9</b>	<b>798.3</b>

*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>
<b>Total fish products</b>	<b>60,600</b>	<b>76,100</b>	<b>70,700</b>	<b>67,406</b>	<b>63,603</b>

*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 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 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

Mr. Piotr Rucinski

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

or Mrs. Jolanta Figurska,

E-mail: [Jolanta.Figurska@fas.usda.gov](mailto:Jolanta.Figurska@fas.usda.gov)

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

Tel: (48-22) 504 2349

**End of Report.**