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EU Ornamental Fish Import & Export Statistics 2017 (Third Countries & Intra-EU Community trade)

Ornamental fish imported to the EU from non-EU Member States (extra-EU trade) arrive via Border Inspection Posts (BIPs). At clearance, the relevant customs authorities log the value and freight weight of these consignments. "Live ornamental freshwater fish" and "Live ornamental fish (excl. freshwater)" (marines) are given different commodity codes, these being: 03011100 for freshwater fish and 03011900 for marines. No further differentiation can then be made, e.g. whether they are coldwater or tropical fish. These two commodity codes do not cover imports/exports of ornamental invertebrates such as corals, molluscs or crustaceans.

Imports to the EU

The value of imports appears to be accurately recorded but freight weights (other than in the UK) seem to be inaccurately and/or poorly recorded. Therefore, no analysis of freight weights has been attempted. Value is not the most reliable indicator of the volume (number) of ornamental fish due to factors such as variations in the price of fish, inflation, variation in rate of exchange, cost of freight and fuel, etc. This can make the direct comparison between years difficult, but it is the best data available. Every year, OATA prepare this report with data from Eurostat records. Eurostat are provided with trade data from EU Member States and then convert this data to Euros, based on a monthly exchange rate (Chesson, 2017).

Figure 1 below shows the total value of freshwater and marine ornamental fish imports into the EU between 2005 and 2017. The total value of imports for ornamental fish into the EU has declined since 2006 (with a 19.3% decrease from the peak in import values of €93.4 million seen in 2006 to €74.1 million in 2017). In comparison with the lowest import values of €72.3 million in 2014, in 2017 there was an increase of 2.5% on 2014 figures. However, in relation to last year's import values, 2017 has seen a decrease of 5.4% (€74.1 million for 2017 compared to €78.3 million for 2016).

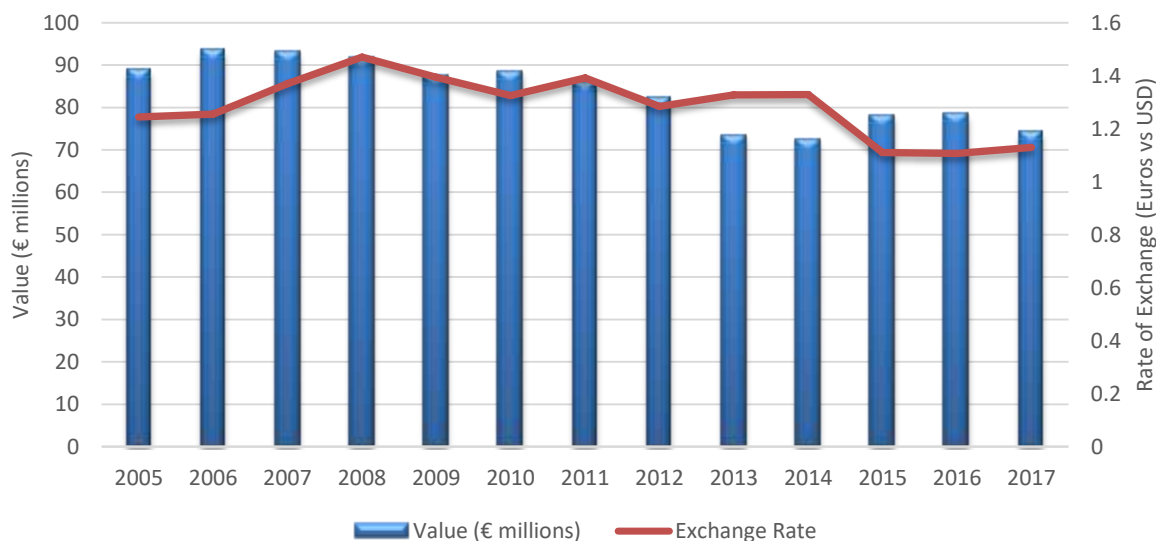


Figure 1: Total value of freshwater and marine ornamental fish imports into the EU (from non-EU countries) between 2005 and 2017. Values given are in € millions and shown against the rate of exchange (Euros vs USD) for the years 2005-2017. The Rate of Exchange is based on each year's average exchange rate for 2005 to 2017. Source: European Central Bank (https://www.ecb.europa.eu/stats/policy_and_exchange_rates/euro_reference_exchange_rates/html/eurofxref-graph-usd.en.html)

Importing Countries

The top 5 EU Member States importing ornamental fish, by value, from outside the EU has changed for 2017 with Belgium now entering the top 5 and replacing Italy who moves down to 6th. The order of the 7th to 10th EU Member States remains the same as 2016 (**Figure 2**). The UK again continues to be the largest importer by value in the EU. For 2017, the UK accounted for just over 25% of the total value of imports from outside the EU, however, there continues to be a decrease in import value, with a 9.6% decrease in import value when compared to 2016.

Table 1 provides a comparison of import values for the top 10 importing EU Member States between 2010 and 2016. Although the UK is currently the largest importer by value, since OATA's data collection began in 1989, Germany had previously always imported more than the UK, until 2004, when their non-EU imports dropped sharply. This was due to Germany having imported large quantities of ornamental fish from the Czech Republic, which became a member of the EU in 2004. The value of imports for Germany between 2016 and 2017 has decreased by 6.9%.

The value of imports from non-EU countries to the Netherlands has almost doubled since 1993, although it remains the third largest importer of ornamental fish, as from 2006 to the present day. The value of imports between 2016 and 2017 has decreased slightly by 1.4%.

Whereas previously Italy and Belgium had been the fifth and sixth largest importers, for 2017, their positions have reversed with Belgium moving into the top 5 and Italy is now 6th. For positions 7 to 10, these remain the same as in 2016 i.e. Spain, Poland, Czech Republic and Sweden. Spain, the Netherlands and the Czech Republic re-export much of what they import to elsewhere in the EU. The value of imports into France continues to show a decline with a 1.2% decrease in import values for 2017.

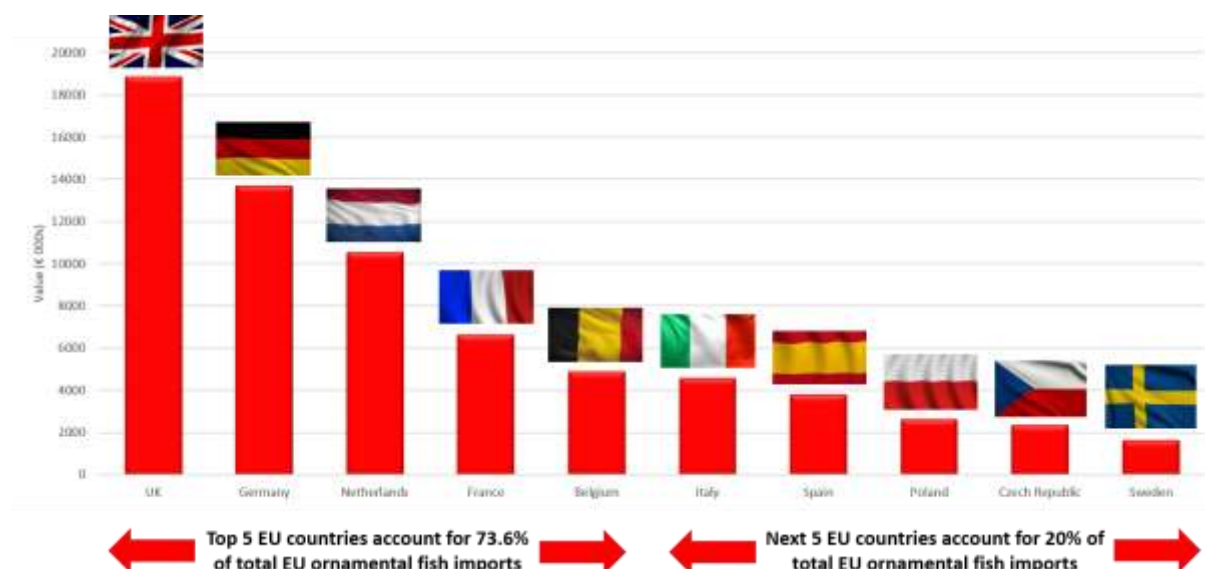


Figure 2: Top 10 EU countries importing ornamental fish from non-EU countries for 2017

Country		2017		2016		2015		2014		2013		2010	
	Position for 2017	€ (000s)	% of total EU imports	€ (000s)	% of total EU imports	€ (000s)	% of total EU imports	€ (000s)	% of total EU imports	€ (000s)	% of total EU imports	€ (000s)	% of total EU imports
United Kingdom	1	18,841	25.4	20,835	26.6	21,720	27.8	19,745	27.3	19,639	26.8	20,920	23.7
Germany	2	13,677	18.5	14,698	18.8	14,707	18.8	13,149	18.2	13,547	18.5	16,813	19
Netherlands	3	10,512	14.2	10,664	13.6	10,652	13.6	9,069	12.5	8,728	11.9	11,995	13.6
France	4	6,627	8.9	6,707	8.6	6,812	8.7	7,212	10	7,595	10.4	9,399	10.6
Italy	6	4,549	6.1	4,821	6.2	4,979	6.4	4,920	6.8	4,969	6.8	6,741	7.6
SUBTOTAL (1-5)		54,206	73.1	57,725	73.8	58,870	75.3	54,095	74.9	54,478	74.4	65,868	71.9
Spain	7	3,778	5.1	4,373	6.1	4,340	5.5	4,281	5.9	4,063	5.5	4,973	5.6
Belgium/Luxembourg	5	4,873	6.6	4,741	5.6	3,447	4.4	3,374	4.7	3,778	5.2	3,975	4.5
Czech Republic	9	2,313	3.1	2,332	3.1	2,563	3.3	2,205	3.1	2,006	2.7	2,081	2.4
Poland	8	2,589	3.5	2,459	3	2,280	2.9	1,886	2.6	1,729	2.4	2,094	2.4
Sweden	10	1,615	2.2	1,715	2.2	2,099	2.7	1,974	2.7	1,932	2.6	2,013	2.3
SUBTOTAL (6-10)		69,374	93.6	73,345	93.6	73,599	94.1	67,815	93.8	67,986	92.7	81,004	91.7
Others		4,684	6.3	4,991	6.4	4,624	5.9	4,450	6.2	5,352	7.3	7,375	8.3
GRAND TOTAL		74,058		78,336		78,223		72,265		73,338		88,379	

Table 1. Top 10 EU countries importing ornamental fish from non-EU countries between 2010 and 2017. * Note that for 2016 & 2017, EU countries are listed in their relative positions to 2015 and not their actual positions. For 2017, in their actual positions, the subtotal for the top 5 EU countries is 54,530 (% total is 73.6%).

For 2017, imports into EU Member States of freshwater ornamental fish from non-EU countries accounted for 83.5% of the total value of imports for that year, with the remaining 16.5% attributed to the import of marine ornamental fish.

Table 2 shows the top 10 importers of freshwater fish into the EU and **Table 3** lists the top 10 importers for marine species for 2017, from non-EU countries.

Table 2. Top 10 freshwater fish importers (2017)

Country	€ (000s)	% of total freshwater imports
U.K.	15,274	24.7
Germany	11,323	18.3
Netherlands	8,550	13.8
France	5,482	8.9
Belgium	4,716	7.8
SUBTOTAL (1-5)	45,345	73.5
Spain	3,458	5.6
Italy	3,045	4.9
Poland	2,286	3.7
Czech Republic	2,173	3.5
Sweden	1,456	2.4
SUBTOTAL (1-10)	12,418	20.1
Others	4,106	6.6
GRAND TOTAL	61,869	

Table 3. Top 10 marine fish importers (2017)

Country	€ (000s)	% of total marine imports
U.K.	3,567	29.3
Germany	2,354	19.3
Netherlands	1,962	16.1
Italy	1,504	12.3
France	1,145	9.4
SUBTOTAL (1-5)	10,532	86.4
Spain	320	2.6
Poland	303	2.5
Sweden	159	1.3
Belgium	157	1.3
Czech Republic	140	1.1
SUBTOTAL (1-10)	1,079	8.8
Others	578	4.7
GRAND TOTAL	12,189	

Source Countries

In 2017, EU Member States imported ornamental fish from 58 non-EU countries¹ and territories around the world. Of these, 20 exported both freshwater and marine fish; 19 exported freshwater fish only and the remaining 19 exported marine fish only. These countries are listed in **Appendix 1** and shown in **Figure 3**.



Figure 3: Map showing countries of origin (non-EU) for ornamental fish imports into the EU for 2017. Key: Blue marker (Non-EU countries exporting both Freshwater & Marine fish); Green marker (Non-EU countries exporting Freshwater fish only); Red marker (Non-EU countries exporting Marine fish only)

As per previous years, Singapore continues to remain the top source country for imports into the EU. For 2017, Singapore accounted for 20.2% by value of all fish entering the EU. Again, as in previous years, approximately 69% by value of all fish entering the EU originated from just 5 countries. With regards to the top 10 non-EU countries of origin for marine and freshwater fish combined, the top 5 countries remain the same as 2016, although for the next 5 countries the positions have changed for 2017 with Vietnam ahead of Colombia and China replacing the Philippines in the top 10. Overall, the top 20 non-EU countries remain the same as for 2016 with the exception of Australia which has fallen out of the top 20 and is replaced with Tanzania. **Table 4** below lists the Top 20 non-EU sources of ornamental fish in 2017 (freshwater and marine species combined).

¹ This number includes the Canary Islands, French Polynesia, Hong Kong, New Caledonia and Taiwan that do not have official country/ republic status.

Table 4. Top 20 Non-EU sources of all types of ornamental fish imported into the EU (2017)

Source Country	Value (€ 000s)	% of Total EU Imports
Singapore	14,983	20.2
Israel	11,603	15.7
Japan	11,355	15.3
Indonesia	8,925	12.1
Thailand	4,666	6.3
SUBTOTAL 1-5	51,532	69.6
Sri Lanka	4,312	5.8
USA	2,427	3.3
Vietnam	2,047	2.8
Colombia	2,044	2.0
China	1,486	1.9
SUBTOTAL 1-10	12,316	15.8
Brazil	1,414	1.9
Philippines	1,303	1.8
Kenya	1,106	1.5
Peru	1,019	1.4
Malaysia	953	1.3
SUBTOTAL 1-15	5,795	7.9
Maldives	666	0.9
Hong Kong	499	0.7
Taiwan	453	0.6
Tanzania	299	0.4
Switzerland	271	0.4
SUBTOTAL 1-20	2,188	3.0
Total from remaining 38 countries	2,227	3.0
GRAND TOTAL	74,058	

Imports of marine ornamental fish arrived into the EU from 39 different countries, as did freshwater fish which were also supplied by 39 countries. **Table 5** lists the top 10 sources of freshwater ornamental fish, which essentially remain the same as in previous years, except that for 2017, Thailand is now the 5th largest exporter of freshwater ornamental fish to the EU, with Indonesia moving back up to 4th as per 2015.

Total value of imports of freshwater fish in 2017 has decreased by 3.5% compared to 2016. **Figure 2** shows trends in value of imports of freshwater fish into the EU between 2010 and 2017. A list of all countries exporting freshwater fish to the EU in 2017 is provided in **Appendix 1**.

Table 5. Top 10 non-EU sources of freshwater ornamental fish imported to the EU in 2017

Country	Value (€ 000s)	% of Total EU Imports
Singapore	14,852	24.0
Israel	11,413	18.4
Japan	11,338	18.3
Indonesia	4,736	7.7
Thailand	4,644	7.5
SUBTOTAL 1-5	46,983	75.9
Sri Lanka	3,173	5.1
Colombia	2,044	3.3
Vietnam	2,029	3.2
China	1,486	2.4
Brazil	1,373	2.2
SUBTOTAL 1-10	10,105	16.2
Total from remaining 29 countries	4,781	7.7
GRAND TOTAL	61,869	

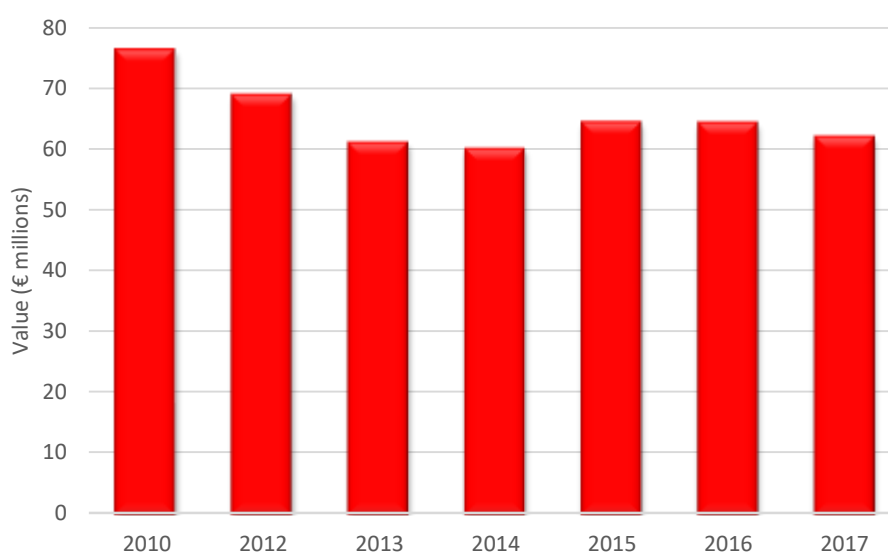


Figure 2. Value of freshwater ornamental fish imports into the EU from non-EU countries between 2010 and 2017 (these values are exclusive of exchange rate adjustment between years).

Table 6 lists the top 10 sources of marine ornamental fish, which remain mostly the same as in 2016, with the exception that South Africa has replaced Vanuatu in 10th position. The value of marine imports has remained fairly constant since 2010, however, there has been a much larger decrease in import value when compared to 2016 of 14.3%. **Figure 3** shows trends in value of imports of marine ornamentals into the EU between 2010 and 2017. A list of all countries exporting marine ornamental fish to the EU in 2017 is provided in **Appendix 1**.

Table 6. Top 10 non-EU sources of marine ornamental fish imported to the EU in 2017

Country	Value (€ 000s)	% of Total EU Imports
Indonesia	4,189	34.4
U.S.A.	2,072	17.0
Philippines	1,270	10.4
Sri Lanka	1,139	9.3
Kenya	997	8.2
SUBTOTAL 1-5	9,667	79.3
Maldives	657	5.4
Australia	242	1.9
Fiji	226	1.9
Israel	190	1.6
South Africa	147	1.2
SUBTOTAL 1-10	1,462	12
Total from remaining 29 countries	1,060	8.7
GRAND TOTAL	12,189	

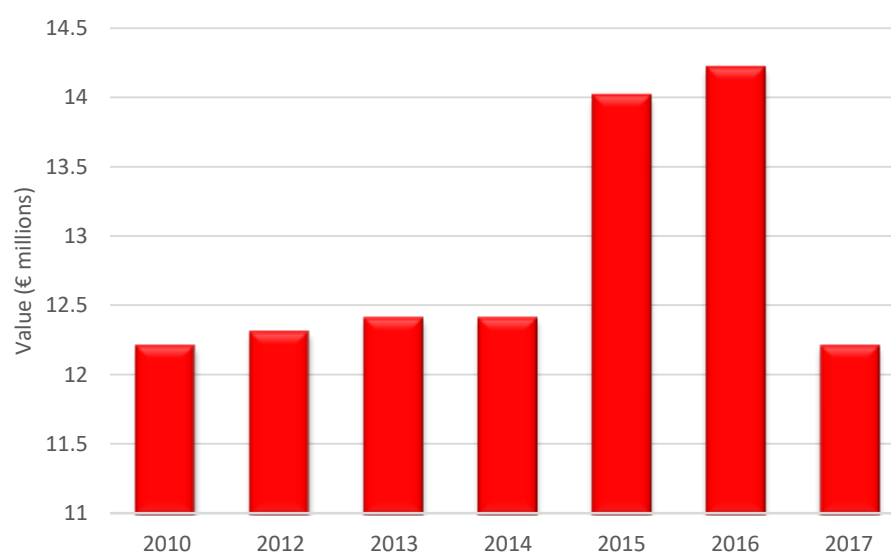


Figure 3. Value of marine ornamental fish imports into the EU between 2010 and 2017 (these values are exclusive of exchange rate adjustment between years).

Trade between EU Member States

For 2017 and in relation to exports between Member States there are 11 EU Member States that did not appear to export any ornamental fish, these being: Croatia, Cyprus, Estonia, Finland, Hungary, Latvia, Luxembourg, Malta, Poland, Romania and Slovenia. The largest EU exporters to other Member States overall continue to be Spain*, followed by the Czech Republic and the Netherlands.

Trade between EU Member States is mostly fish that are imported from third countries and then re-exported, although ornamental fish are produced by some member states, particularly the Czech Republic. As imports and exports of ornamental fish between EU Member States are not required to pass through border inspection posts (BIPs), data on the trade value is collected via EU VAT submissions rather than customs records, and can therefore be incomplete. Therefore, when referring to trade figures between EU Member States, these should be treated with caution and viewed as being indicative only.

Trade flows (import/export) between EU Member States should be expected to match but historically there have always been discrepancies (referred to as trade asymmetries) in the reporting of such trade flows. There are various reasons for such trade asymmetries such as timing and valuation differences, discrepancies in currency conversions of final estimates provided by Member States and methodological differences. However, when trade asymmetries are considered in the scale of global trade volumes, they are estimated to be very low (Chesson, 2017)²

Table 7 summarises data for the top 10 EU exporters to EU Member States in 2017.

Table 7. Top 10 EU exporters to EU Member States (2017)

Country	Freshwater fish exports (€ 000s)	Marine fish exports (€ 000s)	Total value of exports (€ 000s)	% of Total value of EU exports
Spain	612	32,442*	33,054	40.5
Czech Republic	17,372	8	17,380	21.3
Netherlands	3,681	10,536	14,217	17.4
Germany	4,610	418	5,028	6.2
Belgium	2,703	147	2,850	3.5
United Kingdom	1,619	1,129	2,748	3.4
Italy	397	1,303	1,700	2.1
France	290	1,333	1,623	1.9
Greece	2	988	990	1.2
Portugal	142	731	873	1.1
SUBTOTAL 1-10	31,428	49,035	80,463	98.6
Total from remaining 8 countries	718	510	1,228	1.4
GRAND TOTAL	32,146	49,545	81,691	

² Chesson, A. (2017). Asymmetries in Trade Data - A UK Perspective. [Online]. Available at: <https://www.ons.gov.uk/economy/nationalaccounts/balanceofpayments/articles/asymmetriesintradedataauk-perspective/2017-07-13>

*It should be noted that in relation to Table 8 and elsewhere in this report that in relation to the reported value of marine ornamental fish exports from Spain, the figure given continues to be a consistent outlier as has occurred in previous years. Marine ornamental fish exports from Spain to other member states had a total value of €32.4 million for 2017, of which 75% (€24.1 million) comprised exports to Italy. Given that Spain's marine aquaculture is predominantly food fish rather than ornamental fish, OATA has sought to seek an explanation as to the reason why this export value continues to be so high. In this respect, OATA has contacted Spain's pet trade association, AEDPAC (Asociacion Espanola de Distribuidores de Productos para Animales de Compania) for advice on a possible explanation. AEDPAC advise that Spain is not known to have exporters of marine ornamental fish and therefore such trade is likely to be either zero or very close to zero. As trade data between Member States is based on EU VAT return submissions rather than customs records via BIPs, the most likely explanation for these figures is that they relate to the export of live marine food fish with the incorrect commodity code being applied. OATA therefore advises that the figure for marine ornamental fish exports from Spain should be treated with extreme caution, noting the caveat above.

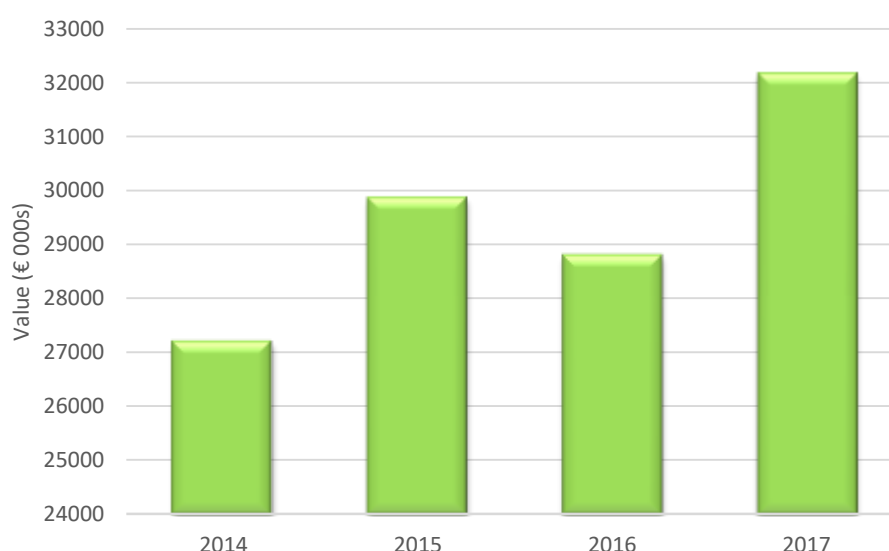


Figure 4: Freshwater ornamental fish exports between EU Member States between 2014 to 2017 (export comparisons pre-2014 have not been undertaken given that Croatia joined the EU in 2013)

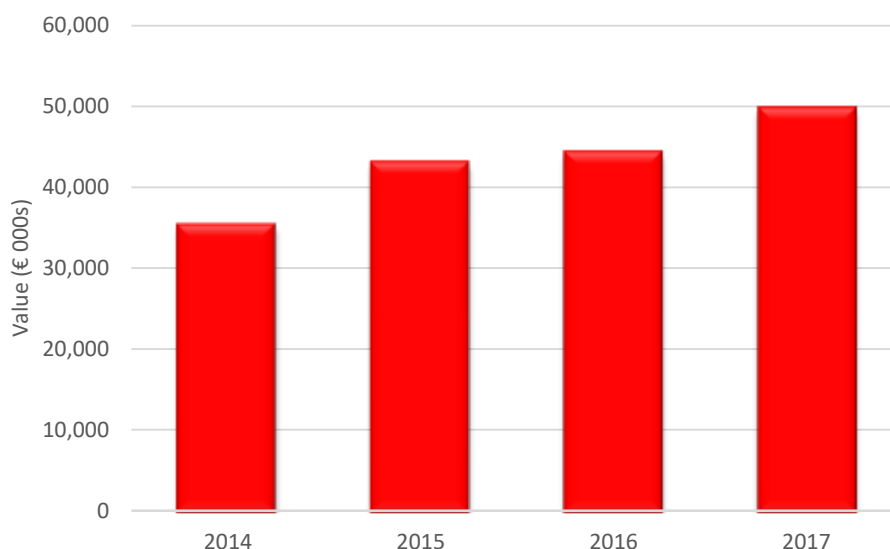


Figure 5: Marine ornamental fish exports between EU Member States between 2014 to 2017* (export comparisons pre-2014 have not been undertaken given that Croatia joined the EU in 2013, * refer to caveat above re: exports from Spain)

Figure 4 shows the values of exports of freshwater ornamental fish between EU Member States, for 2017 this value was €32.1 million which is a 11.7% increase on the value for 2016 (€28.8 million). In relation to the value of exports of marine ornamental fish between EU Member States, these are shown in **Figure 5** where the value of exports for 2016 was €49.5 million compared to €44.1 million for 2016 and representing a 12.3% increase (but see previous caveat regarding outlier value).

Exports from the EU to third countries

Table 8 summarises data for the top 10 EU exporters to non-EU countries for 2017.

Table 8. Top 10 EU exporters to non-EU countries (2017)

Country	Freshwater fish exports (€ 000s)	Marine fish exports (€ 000s)	Total value of exports (€ 000s)	% of Total value of EU exports
Germany	1,669	50	1,719	24.6
Sweden	1,135	20	1,155	16.5
United Kingdom	758	-	758	10.8
Czech Republic	743	-	743	10.6
Netherlands	589	116	705	10.1
France	377	183	560	8.0
Denmark	382	77	459	6.6
Spain	366	8	374	5.3
Poland	213	-	213	3.0
Austria	186	-	186	2.7
SUBTOTAL (1-10)	6,418	454	6,872	98.2
Total from remaining countries	5	123**	128	1.8
GRAND TOTAL	6,423	577	7,000	

** The top 10 EU exporters of marine ornamental fish to non-EU countries for 2017 with value in brackets representing € 000s were: France (183), Netherlands (116), Denmark (77), Italy (62), Germany (50), Portugal (36), Sweden (20), Cyprus (9), Spain (8) and the Republic of Ireland (8).

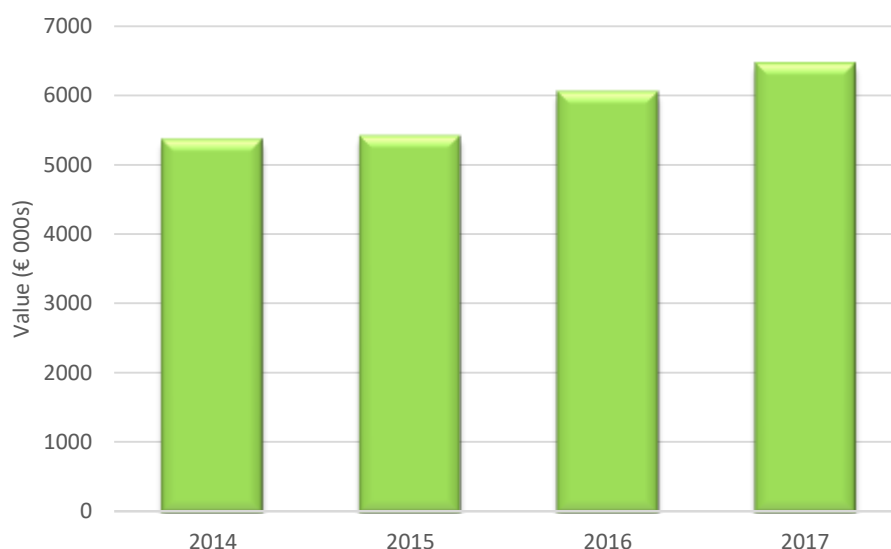


Figure 6: Freshwater ornamental fish exports from EU Member States to Third Countries between 2014 to 2017 (pre-2014 export comparisons have not been undertaken given that Croatia joined the EU in 2013)

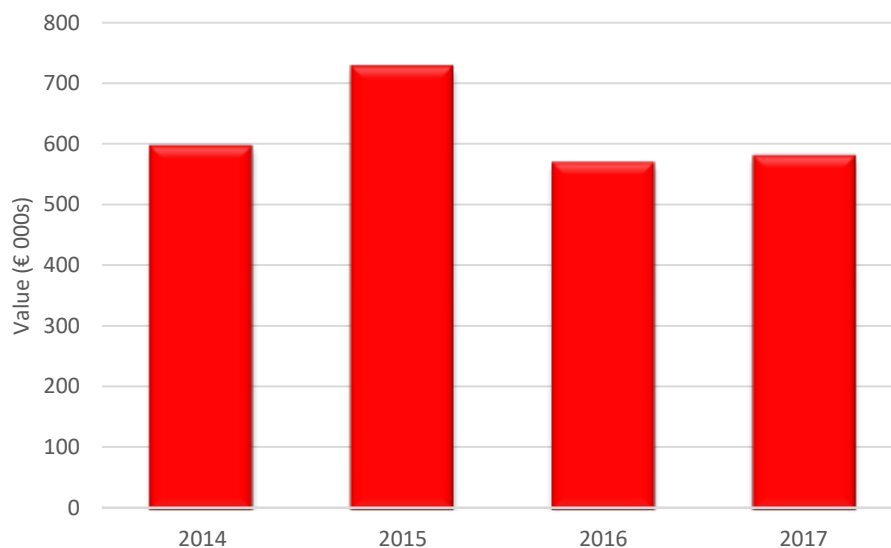


Figure 7: Marine ornamental fish exports from EU Member States to Third Countries between 2014 to 2017 (pre-2014 export comparisons have not been undertaken given that Croatia joined the EU in 2013)

Figure 6 shows the value of freshwater ornamental fish exports from EU Member States to third countries, for 2017, the value of these was €6.4 million which represents a 6.9% increase on 2016. **Figure 7** shows the value of marine ornamental fish exports from EU Member States to third countries. For 2017, the value of these was €0.57 million representing a 1.9% increase when compared to values for 2016.

Exports from the United Kingdom

Exports from the UK to third countries – In 2017, the UK did not export any marine ornamental fish to non-EU countries but export values for freshwater ornamental fish totalled €0.7 million with the UK exporting to 15 non-EU countries. 38.8% of these freshwater ornamental fish exports were made to China, followed by the USA and Canada.

Exports from the UK to EU Member States – noting the earlier comment that in terms of exports to Member States, these tend to be re-exports of fish imported from non-EU countries, in 2017, the UK exported freshwater ornamental fish to 7 Member States with a total value of €1.6 million. 91.4% of these exports were made to the Republic of Ireland, followed by Spain and France.

With regards to exports of marine ornamental fish, in 2017 the UK exported to 17 Member States, with an export value of €1.1 million. 24.9% of these exports were made to Portugal, followed by Germany and the Netherlands.

Appendix 1: Countries and Territories exporting ornamental fish to the EU by type of fish (2017)

Country	Freshwater Only	Marine Only	Freshwater & Marine
Australia		✓	
Belize		✓	
Brazil			✓
Cameroon	✓		
Canada			✓
Canary Islands		✓	
China	✓		
Colombia	✓		
Congo Dem. Rep. (Zaire)	✓		
Congo Republic	✓		
Costa Rica	✓		
Cuba		✓	
Djibouti			✓
Dominican Republic		✓	
Ecuador		✓	
Egypt		✓	
Fiji			✓
French Polynesia		✓	
Ghana		✓	
Guinea	✓		
Haiti		✓	
Hong Kong	✓		
India			✓
Indonesia			✓
Israel			✓
Japan			✓
Kenya			✓
Kiribati		✓	
Libya	✓		
Madagascar		✓	
Malawi	✓		
Malaysia	✓		
Maldives			✓
Marshall Islands		✓	
Mauritius		✓	
New Caledonia		✓	
Nicaragua		✓	
Niger	✓		
Nigeria			✓
Norway		✓	
Paraguay	✓		
Peru			✓
Philippines			✓
Qatar	✓		
Singapore			✓
South Africa			✓

Country	Freshwater Only	Marine Only	Freshwater & Marine
Sri Lanka			✓
Surinam	✓		
Switzerland	✓		
Taiwan			✓
Tanzania	✓		
Thailand			✓
Trinidad and Tobago	✓		
Turkey		✓	
USA			✓
Vanuatu		✓	
Vietnam			✓
Zambia	✓		