



SIXTH FRAMEWORK PROGRAMME



CRUSTASEA PROJECT

DEVELOPMENT OF BEST PRACTISE, GRADING &
TRANSPORTATION TECHNOLOGY IN THE CRUSTACEAN
FISHERY SECTOR

LIVE CRUSTACEAN MARKETS



Mål artene



Taskekrabbe



Sjøkreps



Hummer



TARGET MARKETS

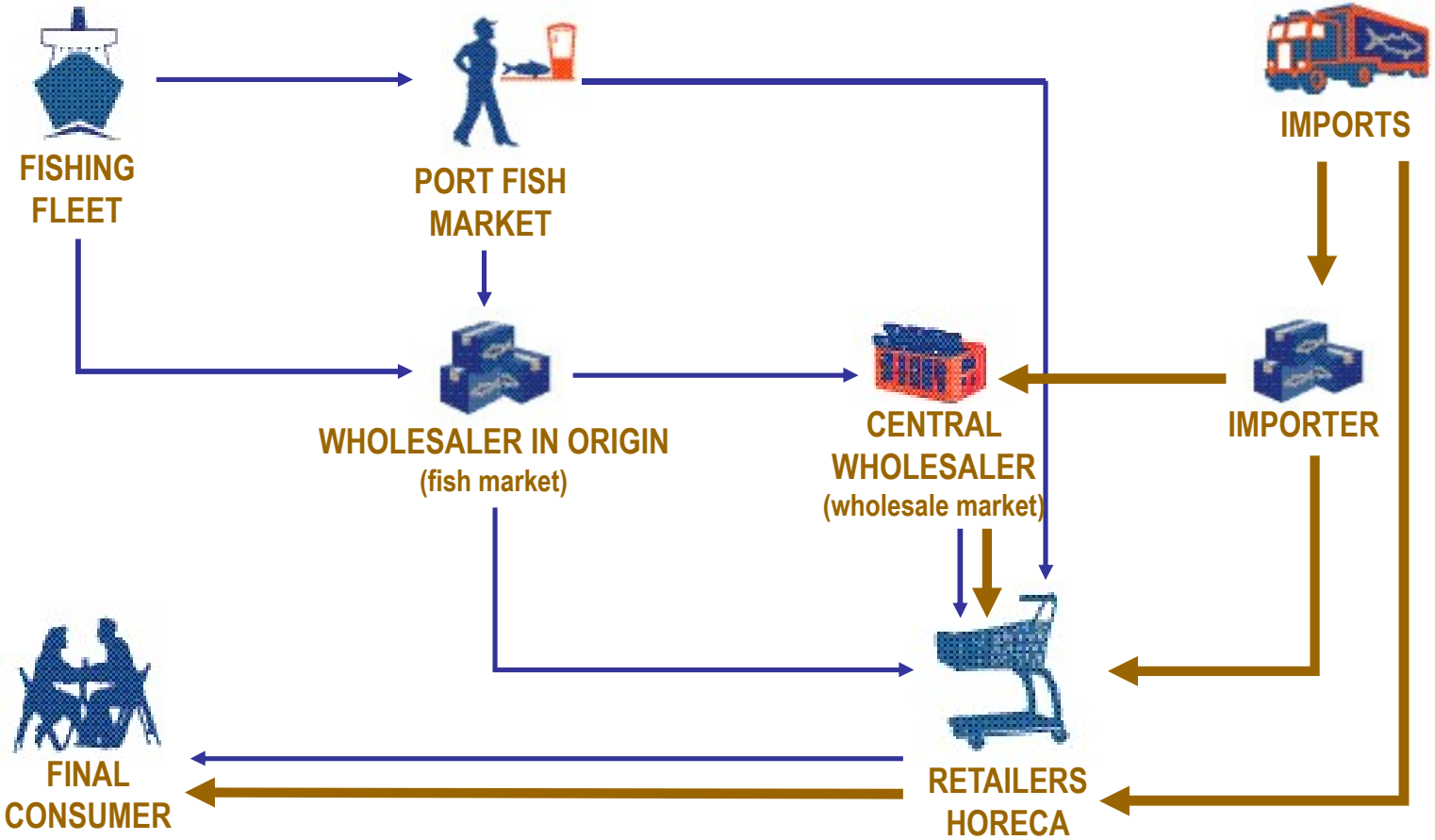


Hovedmarkedene i
undersøkelsen

**FRANKERIKE
ITALA
SPANIA
OG TYSKLAND**



CRUSTACEAN VALUE CHAIN





EC LEGISLATION


EC LEGISLATION applicable to live crustacean produce

- **Regulation (EC) No 178/2002** of the European Parliament and of the Council of 28 January 2002 laying down the general principles and requirements of food law, establishing the European Food Safety Authority and laying down procedures in matters of food safety
 - **Regulation (EC) No 852/2004** of the European Parliament and of the Council of 29 April 2004 on the hygiene of foodstuffs
 - **Regulation (EC) No 853/2004** of the European Parliament and of the Council of 29 April 2004 laying down specific hygiene rules for food of animal origin
 - **Regulation (EC) No 854/2004** of the European Parliament and of the Council of 29 April 2004 laying down specific rules for the organisation of official controls on products of animal origin intended for human consumption
 - **Council Directive 98/83/EC** of 3 November 1998 on the quality of water intended for human consumption
 - **Council Directive 97/78/EC** of 18 December 1997 laying down the principles governing the organisation of veterinary checks on products entering the Community from third countries and repealing Directive 90/675/EC
 - **Commission Regulation (EC) No 1664/2006** of 6 November 2006 amending Regulation (EC) No 2074/2005 as regards implementing measures for certain products of animal origin intended for human consumption and repealing certain implementing measures (Text with EEA relevance)
 - **Council Regulation(EC) No 2406/96** of 26 November 1996 laying down common marketing standards for certain fishery products
 - **Commission Regulation (EC) No 2065/2001** of 22 October 2001 laying down detailed rules for the application of Council Regulation (EC) No 104/2000 as regards informing consumers about fishery and aquaculture products (Text with EEA relevance)
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EC LEGISLATION

▪ LEGAL REQUIREMENTS AT STORAGE, TRANSPORT AND FIRST-SALE POINTS

- Live animals must be protected
 - Clean sea water
 - Animals must be handled with care
 - There is no legal need for chilling
 - Storage facilities i.e. tanks and boxes made of easy-to-clean materials, and also easy to disinfect.
 - Materials, facilities and devices must be well-conserved and clean at all moments.
 - It is desirable but not mandatory that materials are eligible to be in physical contact with food products.
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EC LEGISLATION

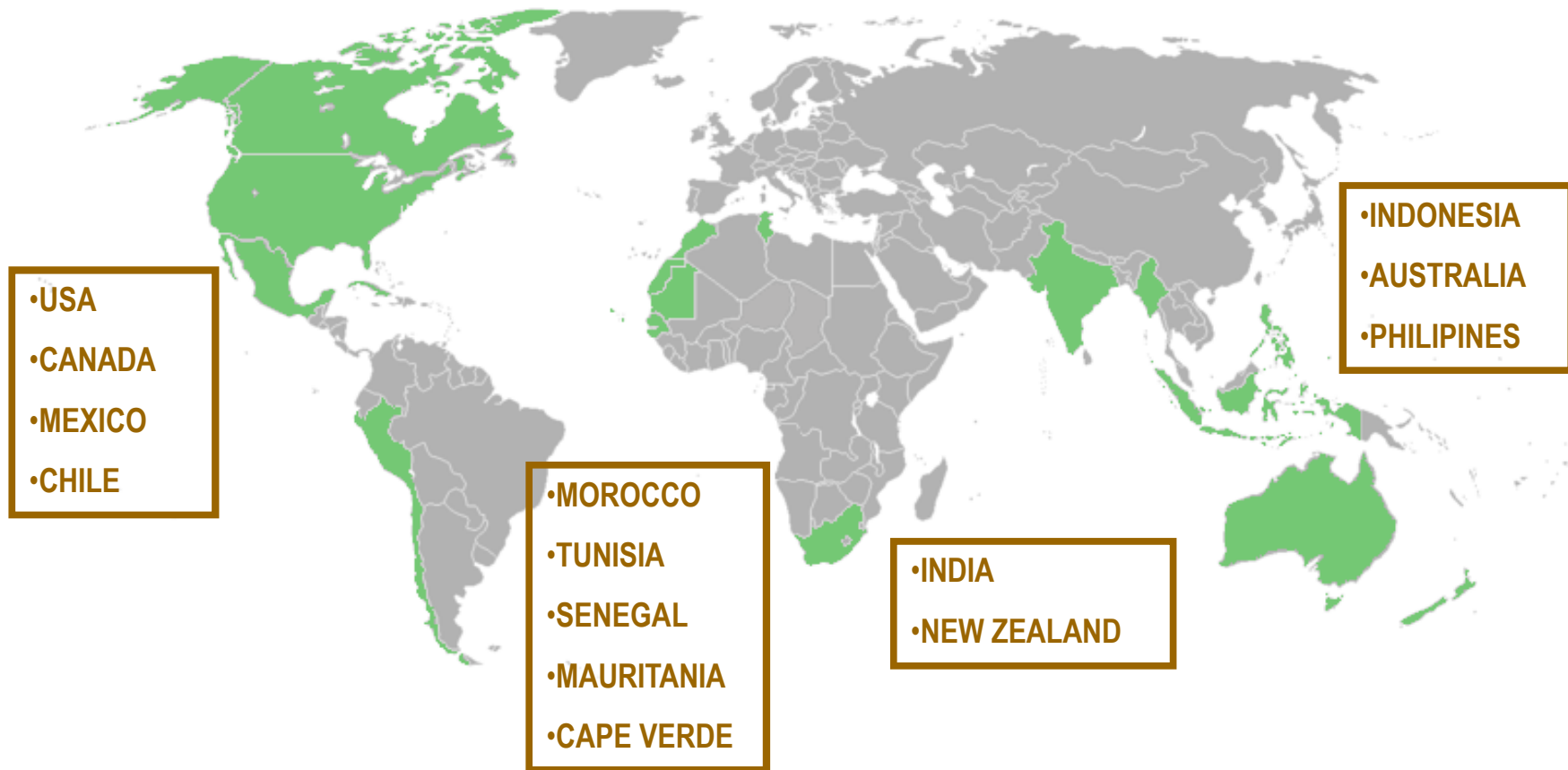
FOOD HYGIENE & SAFETY REGULATIONS. IMPORTS

- Mandatory organoleptic features: live crustaceans must be alive or show appearance of vitality.
- If live crustaceans have been grown in farms they must have absence of:
 - Residues of veterinary treatments
 - Residues of pesticides and disinfectants
 - Residues of heavy metals

- Nobody is allowed to import, export or commercialize within the EU without an authorization number from the Food Hygiene General Registration.
 - Minimum information required in the product label for imports: country of origin & number of authorized facility.
 - All products must be accompanied by the Health Certificate for imports of fishing products whose destination is human consumption
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Konkurrenter

- Land som eksporterer skalldyr til det Europeiske markedet



KONKURENTER

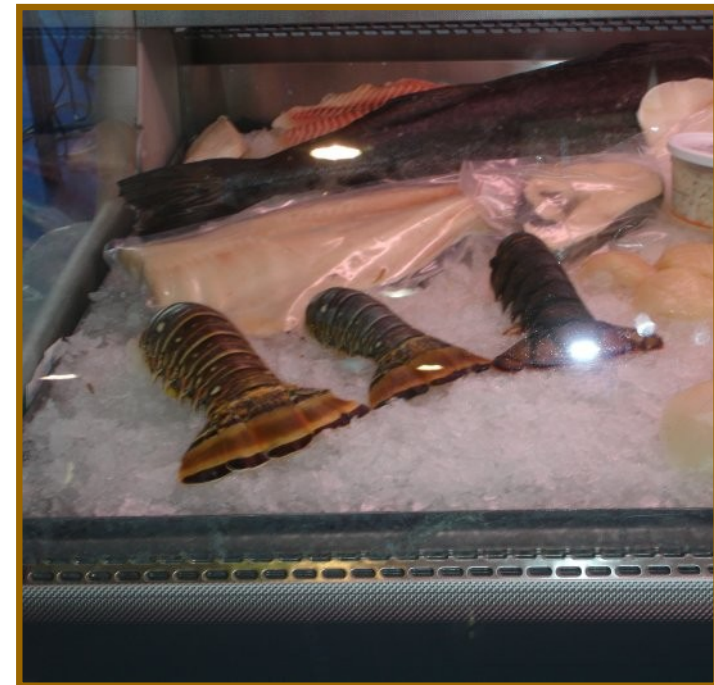
■ PRODUKTER



• HERMETISK HUMMER

• SINGELPAKKET

•HALER



KONKURRENTER

- **PRODUKTER OG PRESENTASJON**



•FROSSEN
KRABBE

- SKALLDYR
KJØTT



•FERDIG RETTER

KONKURRENTER

- ANDRE ARTER

- LANGUSTER



KONKURENTER

- **ANDRE ARTER**



•**SPIDER CRAB**

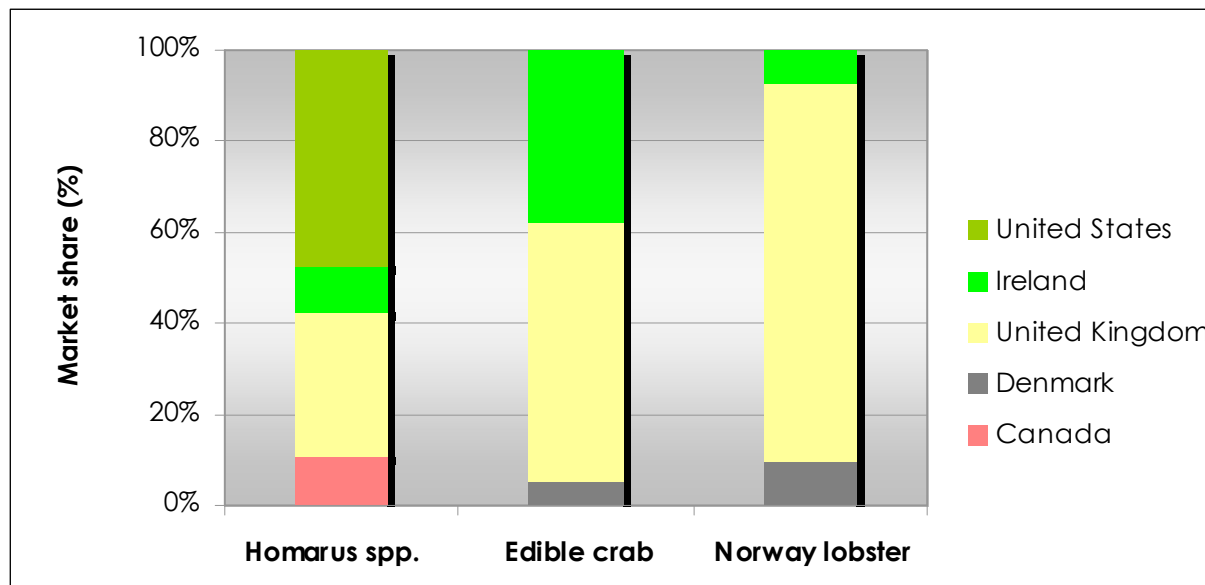
•**RED KING CRAB**



MARKEDSOVERSIKT

FRANKRIKE

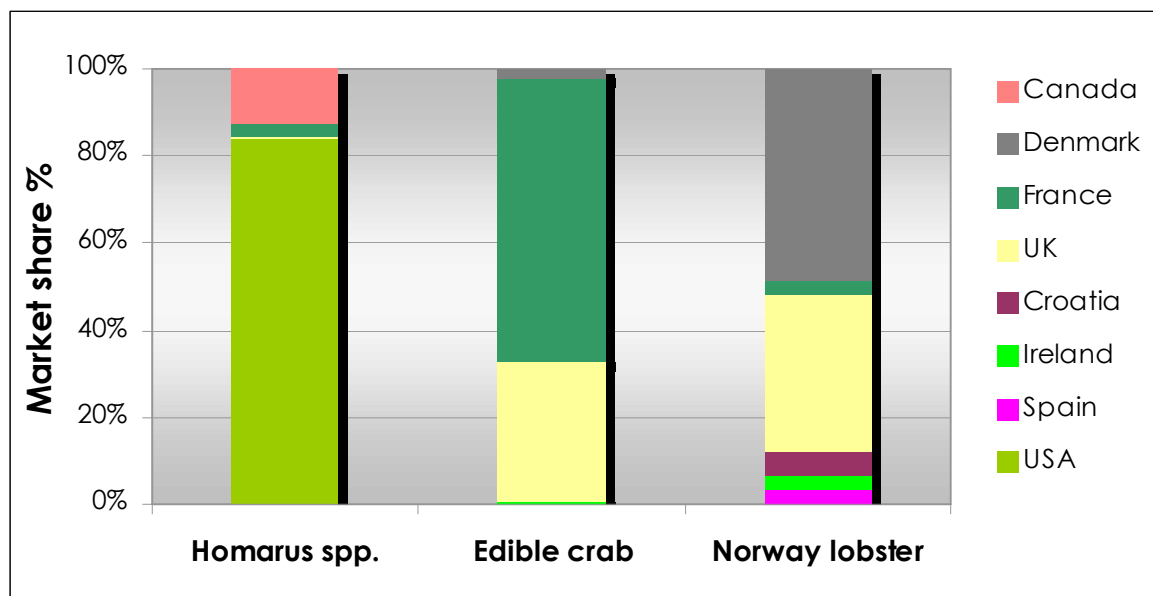
	Imports	Production	Exports	Market size
Norway lobster	5339	4953	332.6	9959.4
<i>Homarus spp.</i>	3422.2	155	350.6	3226.6
Edible crab	6304.6	2428	1936.9	6795.7



MARKEDSOVERSIKT

ITALIA

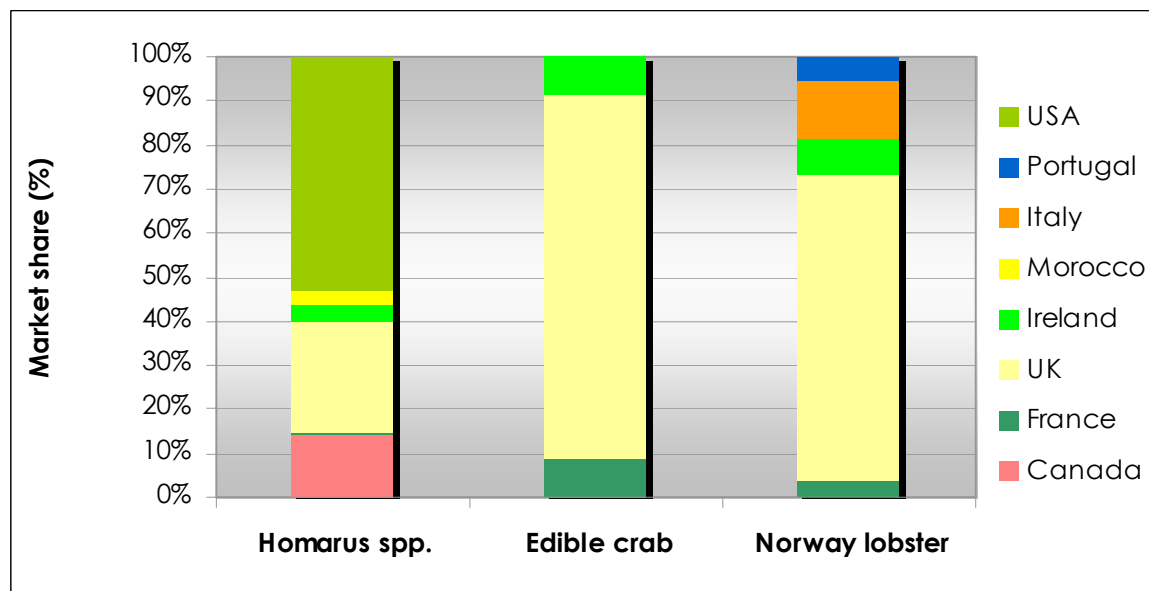
	Imports (t)	Production (t)	Exports (t)	Market size (t)
Norway lobster	1603	4387	38.7	5951.3
<i>Homarus spp.</i>	3811.2	10	28.3	3792.9
Edible crab	742.2	-	23.7	718.5



MARKEDSOVERSIKT

■ SPANIA

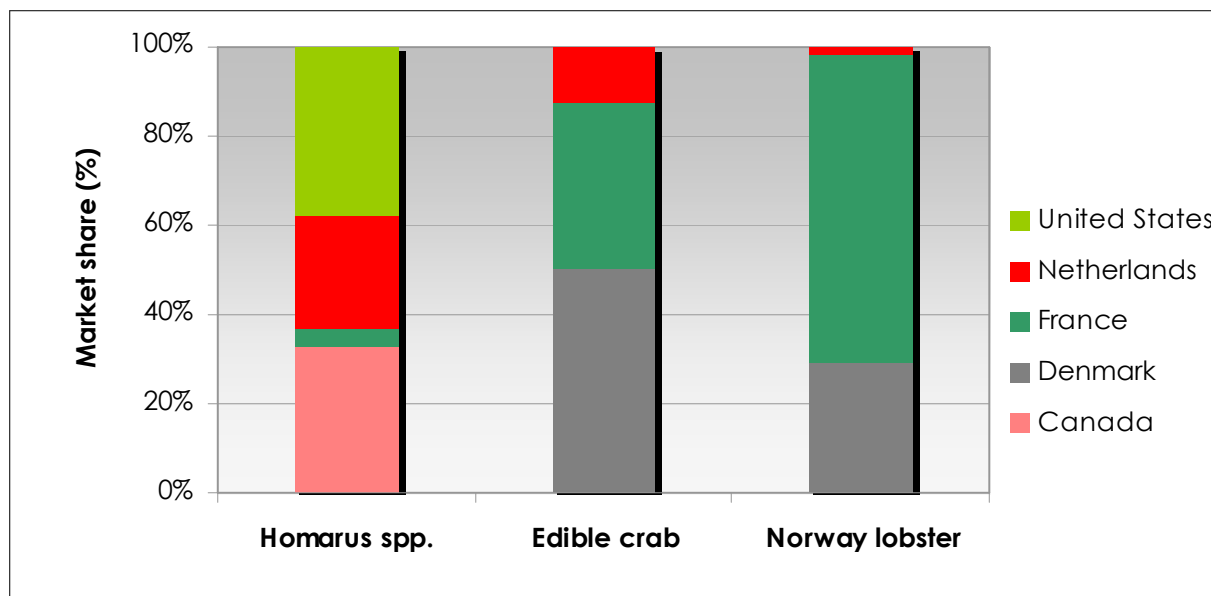
	Imports	Production	Exports	Market size
Norway lobster	4565.5	1623	150.2	6038.3
Homarus spp.	4647.3	14	101.5	4559.8
Edible crab	4830.0	99	92.1	4836.9



MARKEDSOVERSIKT

■ TYSKLAND

	Imports (t)	Production (t)	Exports (t)	Market size (t)
Norway lobster	24.7	5	6.9	22.8
<i>Homarus spp.</i>	703.9	0	123.1	580.8
Edible crab	48.1	15	7.8	55.3





IMPORTØRER

LOKALISERING

Importører med tanker for levende lagring er generelt lokalisert i kystnære områder, men det er noen lokalisert i innlandet.



TRANSPORT

TRANSPORT

Transport metoden fra opprinnelses landene er den samme for alle 3 hovedmarkendene. Det er 2 tilgjengelige metoder:

- I vann i tanker
- Pakket i bokser





Lagring



- Tankene er generelt utstyrt med:
 - Temperatur regulering,
 - Luftesystemer
 - Filtrering av innløpsvannet
 - Protein skimmere.
- Dyrene sorteres på størrelse og art, enten i forskjellige tanker eller i adskilte lag.

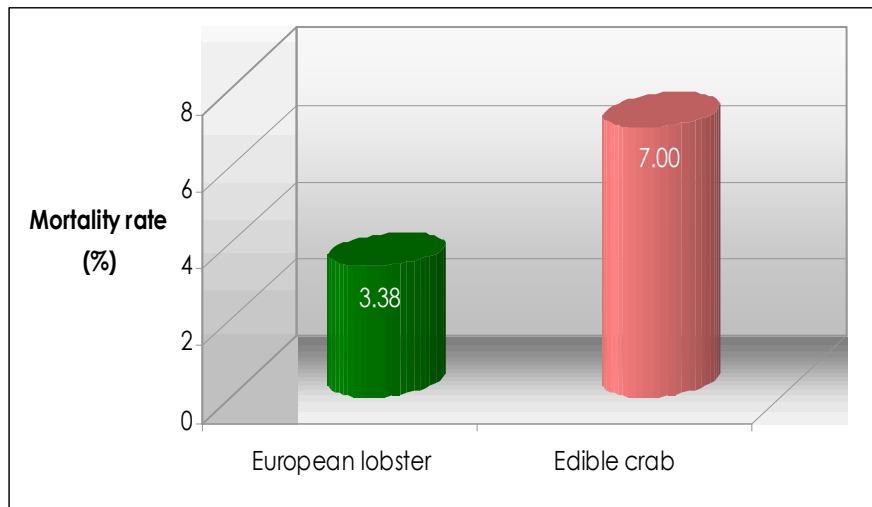




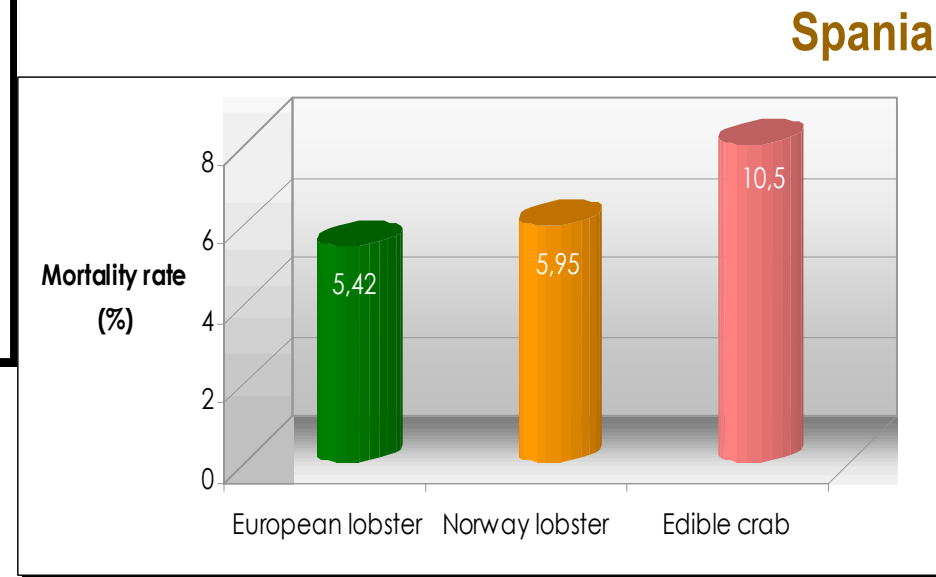
Lagring

LAGRING: Dødelighet

- Dødeligheten varierer mhp art og markeds praksis for lagring

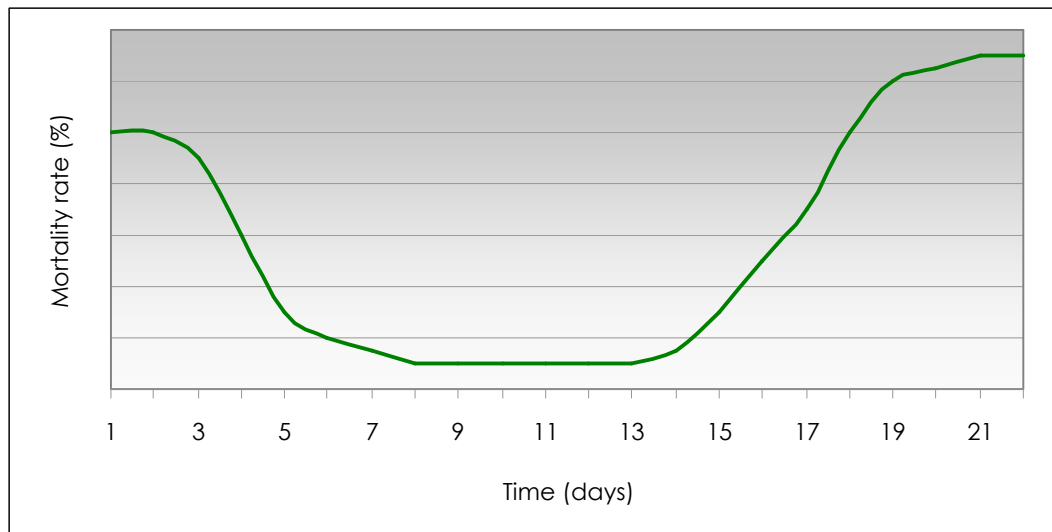


Frankrike



LAGRING

- **LAGRING: VARIGHET**



Taskekrabbe i tank hos en fransk importør.

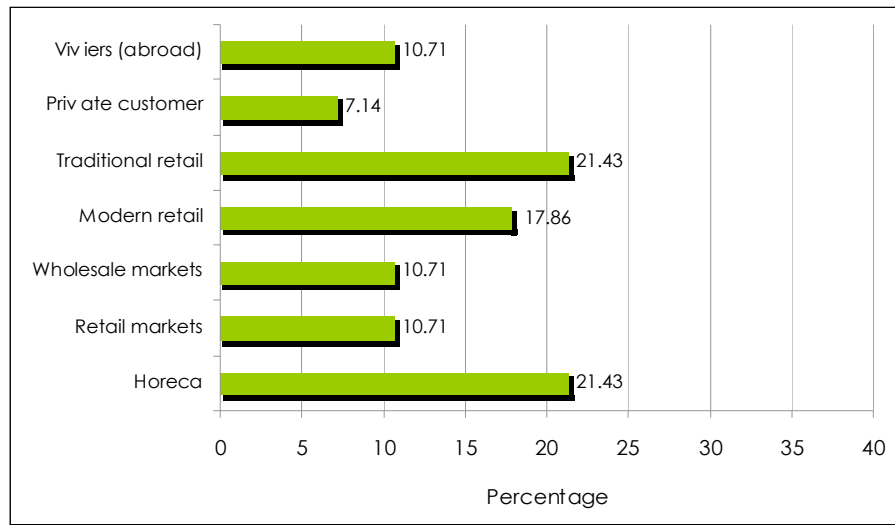


Taskekrabbe: Lagringstid og dødelighet.



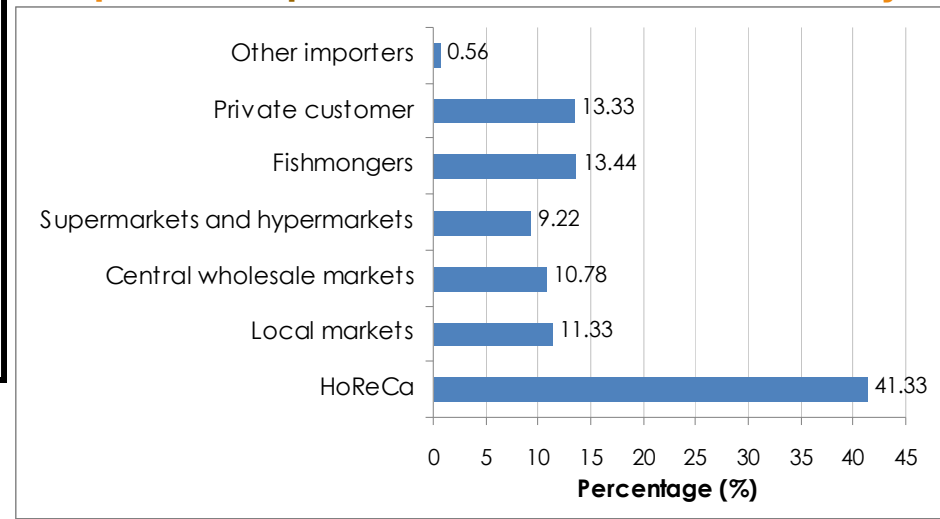
Handel

Kundekategorier



Customer categories and their share within the French importer sector. Live crustaceans

Kunde kategorier og deres andel innen den Spanske importør sektoren. Levende skalldyr

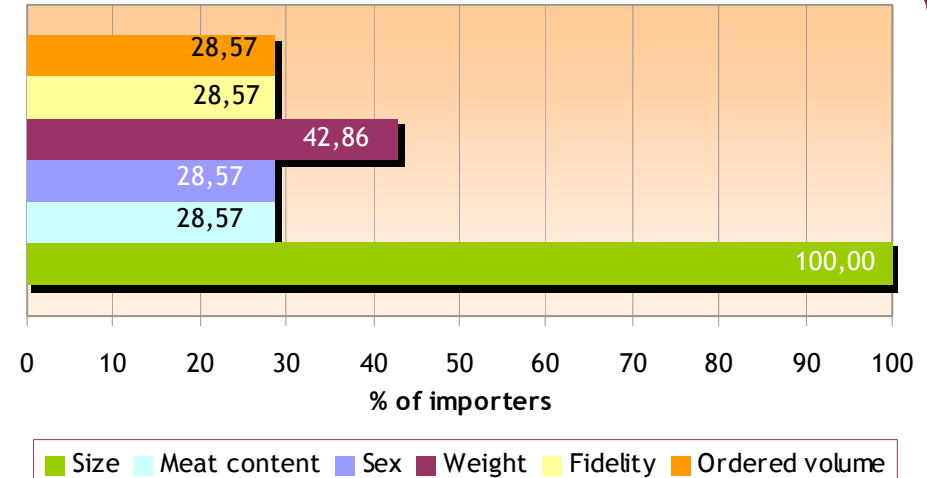
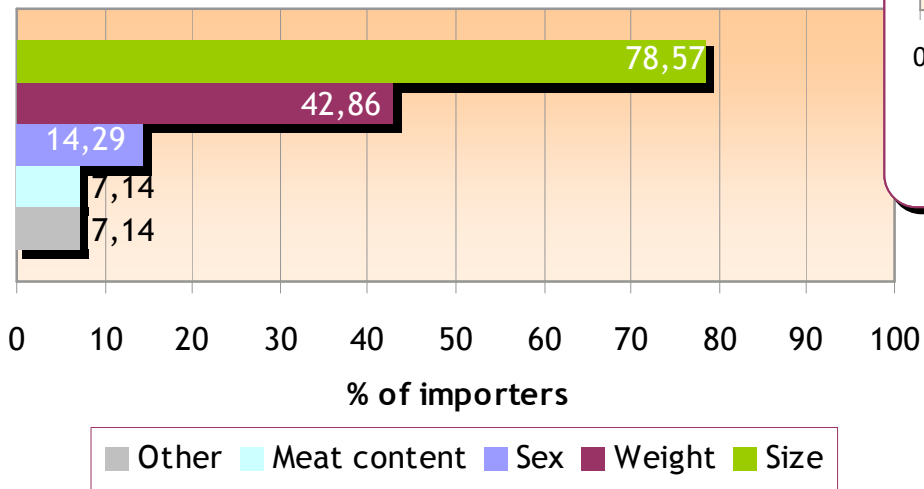


HANDEL

PRIS

Import prisen er i stor grad kvalitetsavhengig.

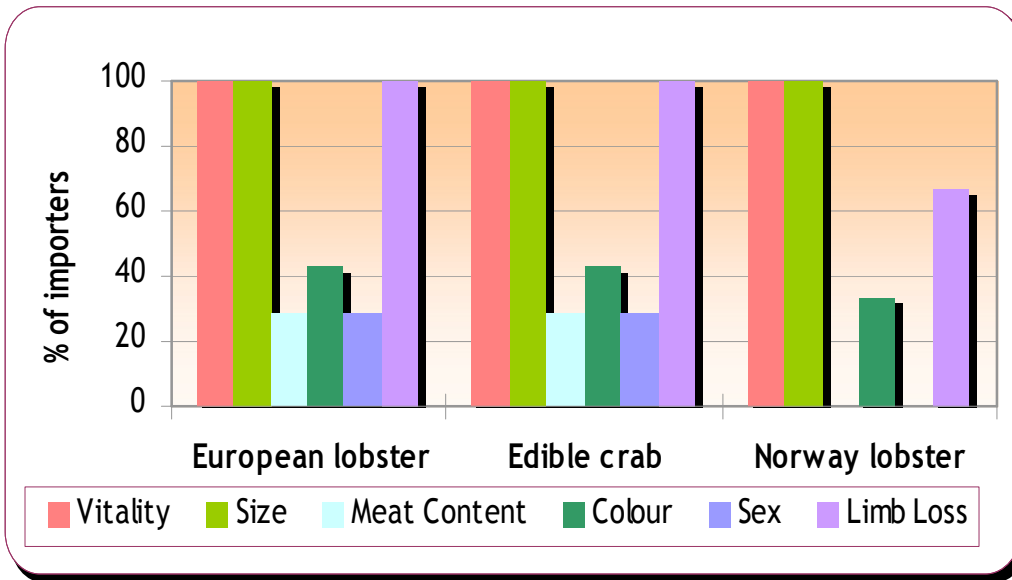
- Størrelse
- Vekt
- Ekstremitetstap
- Kjønn
- Farge



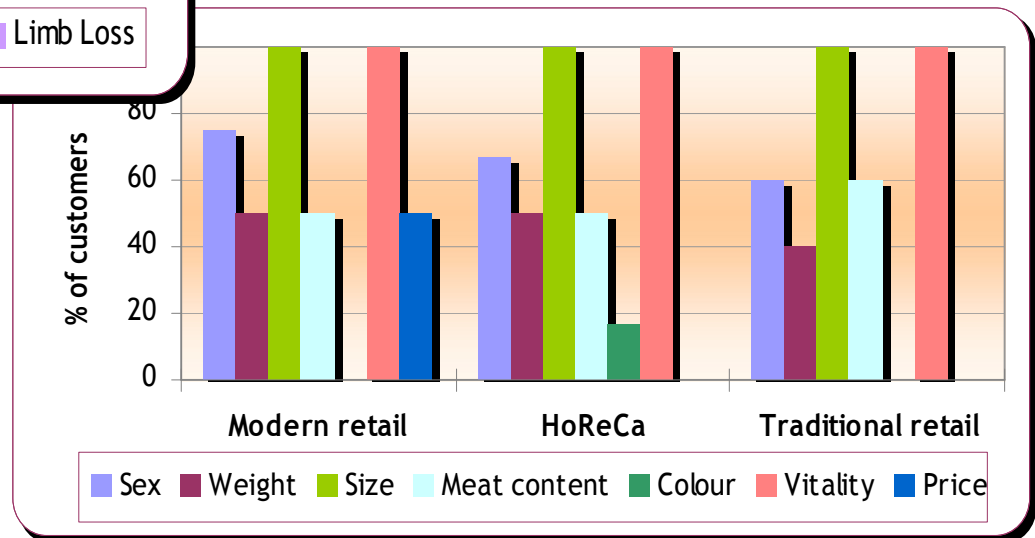
Frankrike. Pris, levende krepsdyr

Spaina. Pris, levende krepsdyr

Kvalitet: Frankrike



Kvalitetsparametre hos sluttbruker.



KVALITET: ITALIA



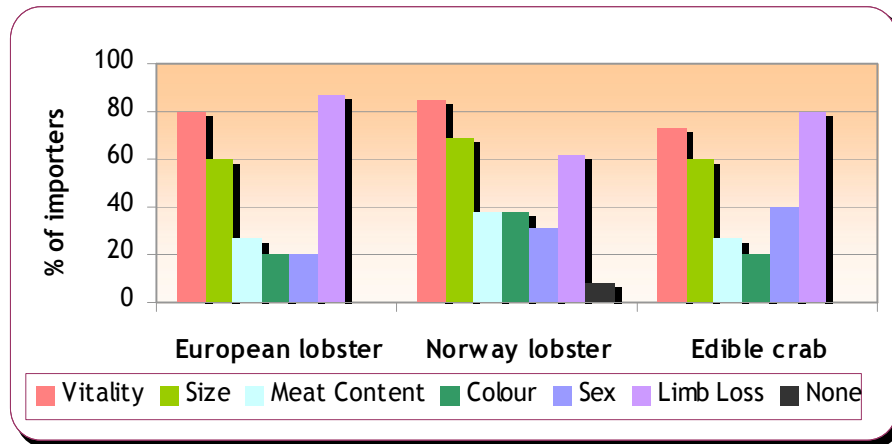
Levende skalldyr. Kvalitet hos importør

Quality parameters checked at each type of importing company		
Parameters	Importer with tanks	Importer without tanks
Sex	<input type="checkbox"/>	<input type="checkbox"/>
Animal size	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Meat content	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Colour	<input type="checkbox"/>	<input type="checkbox"/>
Limb loss	<input type="checkbox"/>	<input type="checkbox"/>
Vitality	<input checked="" type="checkbox"/>	<input type="checkbox"/>

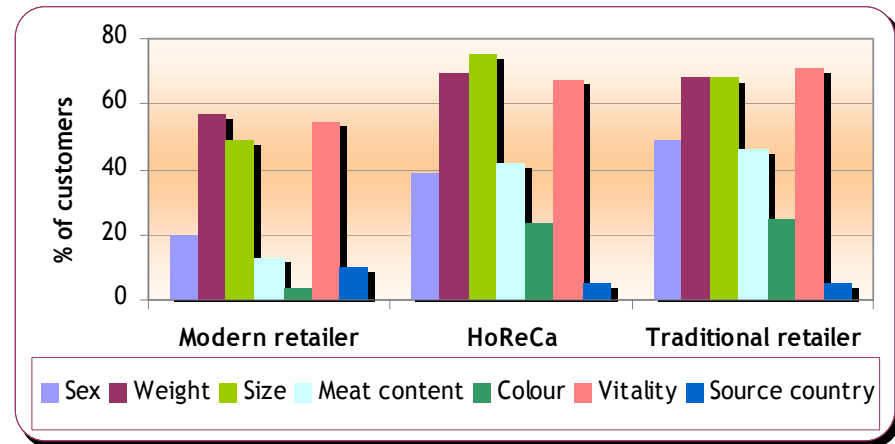
Levende skalldyr. Kvalitet hos sluttbruker

Quality requirements of customers for each retailer			
Parameters	Modern retail	HoReCa	Traditional retail
Sex	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Animal weight	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Animal size	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Meat content	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Colour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vitality	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

KVALITET: SPANIA



Kvalitetsparametere. Hos importør



Kvalitetsparametre hos sluttbruker.

KONKLUSJONER

MULIGHETER

❑ Manglende tilgang på produkt + høye krav til spesialkompetanse = **gjør adgang til dette markedet vanskelig for bedrifter som har lyst til å utvide sitt produktspekter til å omfatte denne næringen.**

❑ **Muligheter for leverandører av levende skalldyr:**

- ✓ Forbedring av produktkvaliteten,
- ✓ redusere dødeligheten og
- ✓ tilnærming til importørens kvalitetskrav.
- ✓ Det er i følge markedsrapporter for levende omsetning av andre krepsdyr arter stor etterspørsel i det Spanske markedet, for arter som feks. Sider Crab og Velvet Crab.
- ✓ Markedsrapportene indikerer og en økt etterspørsel for foredlede produkter av krepsdyr i Sør Europa.

