

## EU market imports less bivalves

The world bivalve market was impacted by currency changes, including the relatively lower value of the euro against the US dollar. EU countries reported lower bivalve imports, particularly the Spanish mussel processing industry, which moved away from expensive imports back to domestic products.

### **Mussels**

#### **World**

For 2015, Chile was again confirmed as the number one exporter of mussels with 69 700 tonnes exported, increasing its volume by 8.6% or 5 500 tonnes, due to strong levels of production.

According to the Undersecretariat of Fisheries and Aquaculture of Chile, 2015 mussel production totalled 283 300 tonnes, demonstrating nearly 20% growth compared with 2014. In contrast, New Zealand production was poor in 2015 and exports of green lipped mussels declined by 15.8%.

#### **Europe**

EU imports of mussels in 2015 totalled 200 000 tonnes, which is the lowest volume they have been in the past six years, 10 000 tonnes less than the average import volume from 2010-2014.

France, the EU's largest market, recorded stable imports in 2015 when compared with the 2010-2014 average at 56 5000 tonnes, while Italy, the second largest importer, demonstrated a remarkable increase in import volumes (+28%) compared with the average volume imported in the 2010-2014 period.

Portugal, though a very minor market, recorded significant growth as well. Otherwise, all EU markets declined rather sharply: the Netherlands by 49%, the UK and Germany by 19% each, and Spain and Belgium by 10% each.

This severe reduction in imports can be explained by the sluggish economy as well as increasing prices, with the average price jumping from EUR 7.90 per kg in 2010 to EUR 14.00 per kg in 2015.

### **Oysters**

2015 was an interesting and dynamic year for international trade of oysters. Imports by the top two global markets, the USA and Japan, increased by 15.9 % and 49% respectively, due to declining domestic landings and growing consumer demand.

In France, another important market though only a moderate player on the international market, domestic production increased slightly compared with previous years, when juveniles suffered from the herpes type of virus, OsHV-1.

This increase in supplies in 2015 was reflected in the December retail price, down by 5% compared with the price in December 2014.

## **Australia**

In February 2016, Tasmania (Australia) Pacific oysters were hit by a disease that resulted in local government prohibiting the movement of Pacific oysters and banning imports of seeds. Fortunately, the native, flat oysters *Ostrea angasi* were not affected by the virus.

## **UK**

According to the UK Shellfish Association of Great Britain, sales of oysters are expanding by 10% per year. The Association reported that 2 500 tonnes of oysters are harvested annually in the UK, totalling an estimated 25 million shellfish.

## **Scallops**

In terms of supplies, in 2015 Chilean production of scallops declined by 30.9% compared with the year before, to total 2 700 tonnes of *Argopecten purpuratus*.

Peru also reported a poor harvest for 2015, with exports at 6 200 tonnes, which is only half of the total 2014 exports.

World trade in scallops increased in 2015, though only due to Chinese growth. In 2015, Chinese imports of scallops nearly doubled compared with 2014 (+90% or +26 800 tonnes), to total 56 400 tonnes.

At the same time, Chinese exports declined by 7.4%, reflecting the increase in China's purchasing power and the booming demand of Chinese consumers for expensive food items, such as scallops.

When removing China from the global scallop trade picture, world imports of scallops have considerably declined in 2015 compared with 2014, by 9.7% or 9 500 tonnes. The USA, the second largest importer, reported a 16.1% decline in import volume down to total 22 400 tonnes. In 2015, EU imports of scallops dropped by 27% compared with 2010 down to 46 400 tonnes, the lowest volume recorded year since 2010.

France, the largest single market for scallops in the EU, reported a 16.1% decline in imports to total 17 000 tonnes in 2015. Looking at French import trends over a longer-term, imports decreased by 28% in 2015 compared with the yearly average in the period from 2010-2014.

France also reports a declining market share; in 2010 France alone was responsible for 44% of total EU scallop imports, whereas in 2015, its market share dropped to 36%. Spain, the second largest scallop market in the EU, also reports shrinking market share.

## **USA**

The US scallop fishery, which is one of the most economically lucrative of all fisheries in the country, seems to be on the decline. In 2011, the US scallop fishery was estimated to be valued at USD 600 million, whereas in 2014, that estimate had dropped to USD 400 million.

A scallop fisheries expert at the National Oceanic and Atmospheric Administration (NOAA) reports that it may continue to go down. Despite this decline, signs of recovery have been detected and are expected by 2017-2018 due to stringent catch regulation. Of course, these are only yield forecasts, which can be very complex as there are always elements of unpredictability.

### **Recent research: Impact of climate change on bivalves**

In early 2016, NOAA scientists published the results of a multispecies assessment of how US marine fish and invertebrate species cope with the effects of global climate change.

The study indicates that species such as scallops, which are considered “specialists”, meaning they use a limited range of prey and habitats, are more likely to be vulnerable to climate change (Source: [www.research.noaa.gov](http://www.research.noaa.gov)).

In a new study, published in February 2016, the University of Glasgow demonstrated the impacts of ocean acidification on mussels. Their research found that in conditions reflecting the projected ocean acidification, mussels produce more calcium carbonate and their shells become harder and less elastic.

(Source: [www.gla.ac.uk/research/news/headline\\_443599\\_en.html](http://www.gla.ac.uk/research/news/headline_443599_en.html))

### **Clams, cockle, ark shells**

According to preliminary figures, global international trade of clam, cockles and such like shells, did not change much in 2015 compared with 2014. However, the situation varies greatly by country. In Japan, there was a significant increase in imports.

### **Outlook**

In March 2016, the EU lifted a nearly twenty-year ban on imports of scallops from China. This ban was established in July 1997 due to the presence of vibrio parahaemolyticus found in large-sized pectinidae *Patinopecten yessoensis*, a bacterium prone to cause gastrointestinal illness in humans.

This species was highly appreciated in the EU before the ban, so it will be interesting to see how this will impact international scallop trade moving forward.

For the time being, it is only one company that is approved to export to the EU, so the impact will be limited.

Source : <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/415272/>