

Demand for European Mussels in the EU on the Decline

In the first quarter of 2016, purchases of mussels in the 10 largest buying countries slightly increased (+2 500 tonnes) compared with the same period in 2015. For the world's largest importers, France and Italy, imports grew by 5 per cent and 4 per cent respectively, according to FAO Globefish.

In terms of exports, the leading traders declined notably: the Netherlands by 24 per cent, Chile by 12 per cent, and Spain by 1 per cent. Interestingly, by contrast, modest producers reported growing exports on the international market, including Denmark (+54 per cent or +1 900 tonnes), New Zealand (+21 per cent or +1 500 tonnes), and Canada (+36 per cent or +900 tonnes).

During the review period, total EU imports of mussels declined by 3 per cent to total 42 400 tonnes compared with 43 600 tonnes in the same period the year before.

The largest importers inside the EU - France and Italy - consolidated their share to take 58 per cent of total EU mussel imports. Inter-EU imports of mussels into smaller markets demonstrated a clear decline, such as Germany (-14 per cent), Belgium (-10 per cent) and the Netherlands (-48 per cent). These markets were traditionally important mussel consumers, but young consumers are not consuming the product as much as older generations have.

The two largest suppliers to the French market, The Netherlands and Spain, consolidated their market share, and in the first quarter comprised 59 per cent of all French imports, at the expense of Italy and Denmark.

Notably, supplies from non-EU origin into the EU reached an unprecedented peak during the first quarter of 2016, accounting for 22 per cent of total EU imports.

Organic mussel production within the EU continues to grow. Indeed, the largest offshore rope-grown mussel farm was started in early 2016 off the coast of southern England (pre-Brexit). At full operation, production is expected to produce 10 000 tonnes of blue mussels *Mytilus*

edulis. Denmark is also leading the organic production charge, with estimates of the country totaling over 2 000 tonnes of organic rope-grown mussels.

Disease incidence continues to brutally impact farms on the west coast of France during the first quarter of 2016. In some areas, local mortality observed in 2015 and 2016, reached 90 per cent. As of May 2016, mortality was still reaching 70 per cent in certain basins (Source: Charente Libre). The *Vibrio splendidus* bacteria is suspected to be the cause of mortality. Moreover, unusual environmental conditions including "large amounts of fresh water, re-suspension of sediments during a series of storms, and a high renewal rate of specific water masses in Brittany's Pertuis area" may be partially responsible for sparking the phenomenon (Source: Epidemiological Bulletin , Animal Health and Food). In May 2016, the French State Minister for Maritime Affairs announced a grant of EUR 4 million to provide to impacted mussel farmers.

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