

The European market potential for farmed black tiger shrimp

Black tiger shrimp has become a niche product in the European shrimp market, which has been traditionally concentrated in North Western Europe and France. Black tiger shrimp was the main product in retail and food service, but its market share has shrunk since the growth in availability of cheaper Pacific white shrimp. Black tiger shrimp is often recognised as a premium product because of its distinctive colour, taste, texture and bigger size availability.

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1. Product description

Black tiger shrimp (*Penaeus monodon*) is part of the *Penaedidae* family. The species is available as wild caught and as farmed products, but this product fact sheet is limited to the market for farmed black tiger shrimp. The European market for wild-caught shrimp, including wild-caught *Penaeus monodon*, which is normally referred to as sea tiger, is discussed in our wild-caught shrimp study. Where black tiger shrimp is mentioned in this report, it means farmed *Penaeus monodon* under the following [Harmonised System](#) codes, unless stated otherwise:

- HS 03061792 – Frozen shrimp of the genus *Penaeus*
- HS 160521 – Shrimps and prawns not in airtight containers
- HS 160529 – Shrimps and prawns in airtight containers

The definitions of products under these HS codes are a bit confusing. The general rule is that products having undergone only one processing step, such as raw peeled and deveined products (PD) or head-on shell-on (HOSO) cooked products, are declared as HS03061792. Products that have undergone at least two processing steps, such as peeled and cooked or peeled and battered, are declared under HS160521 or HS160529. Contrary to cooking, blanching is not officially regarded as a processing step. Peeled and blanched products are still declared under HS03061792.

Black tiger shrimp is mostly imported into Europe as a final product, packed and ready to be distributed in the frozen segments of supermarkets or food service wholesale stores. Contrary to Pacific white shrimp, black tiger shrimp is rarely imported as a bulk product for Europe's domestic processing industry. There might be some exceptions, especially in the United Kingdom, but also in North Western Europe. Some importers have their own processing facilities to reprocess small volumes of imported black tiger shrimp blocks into refreshed products.

Tip:

As an exporter from a developing country, you can get [free access](#) to [Trade Map data](#). Looking up data for the black tiger shrimp relevant HS codes mentioned above will help you better understand the market dynamics.

2. What makes Europe an interesting market for farmed black tiger shrimp?

European consumers eat almost 25 kg of fish and seafood per capita a year. According to a recent study of the

European Commission, shrimp accounts for 6% or about 1.5 kg per person of the total European fish and seafood consumption. Black tiger shrimp, however, represents only a minor portion of the European shrimp consumption and is considered a niche product. As a black tiger shrimp supplier, you have a premium product that has a place in high-end and Asian wholesale markets, as well as some pockets of the retail market in North Western Europe.

Most shrimp imported into Europe is consumed in Southern Europe. The annual per capita consumption of shrimp is almost 3 kg in Spain, 2 kg in Portugal and 1.5 kg in France. The Southern European market is historically linked to South and Central America, so it is rare to see farmed black tiger shrimp in the market there. Instead, black tiger shrimp, mainly produced in Asia and in Madagascar, is mainly consumed in North Western Europe and France.

In 2018, Europe imported approximately US\$450 million to US\$480 million worth of farmed black tiger shrimp, mainly from Vietnam, Bangladesh and Madagascar, which jointly make up more than 95% of Europe's total black tiger shrimp imports, and to a lesser extent also from Indonesia and India. The market for black tiger shrimp has shrunk significantly over the past couple of years, as Pacific white shrimp, which is produced and traded at a lower price point, has taken over the mainstream market. Black tiger shrimp has since become a niche product in the food service and retail markets.

For the European retail market, particularly in North Western Europe, but increasingly elsewhere, Aquaculture Stewardship Council (ASC) certification is essential for market access. The majority of major retailers commit to only selling farmed shrimp products that have been certified by ASC. This trend is spreading quickly along with the industry consolidation trend, through which international groups introduce ASC certification to new markets; our trends study goes into more detail on both trends.

Despite being a niche product, black tiger shrimp is the third most common exotic shrimp imported into the European market after farmed Pacific white shrimp at approximately US\$2 billion in import value and wild-caught Argentinian red shrimp with US\$587 million. While Pacific white shrimp is popular because of its price, black tiger shrimp is chosen because of its unique colour, taste, texture and larger sizes.

Although we expect overall shrimp consumption in Europe to increase further in the short and long terms, for black tiger shrimp it is likely to be the opposite scenario. As prices of Pacific white shrimp continue to go down, it is likely that wholesalers and retailers increasingly choose Pacific white shrimp over black tiger shrimp. In the long term, we expect that black tiger shrimp will consolidate in a smaller niche product in the North Western European wholesale market, positioned as a premium product based on size, texture, colour and taste.

Tip:

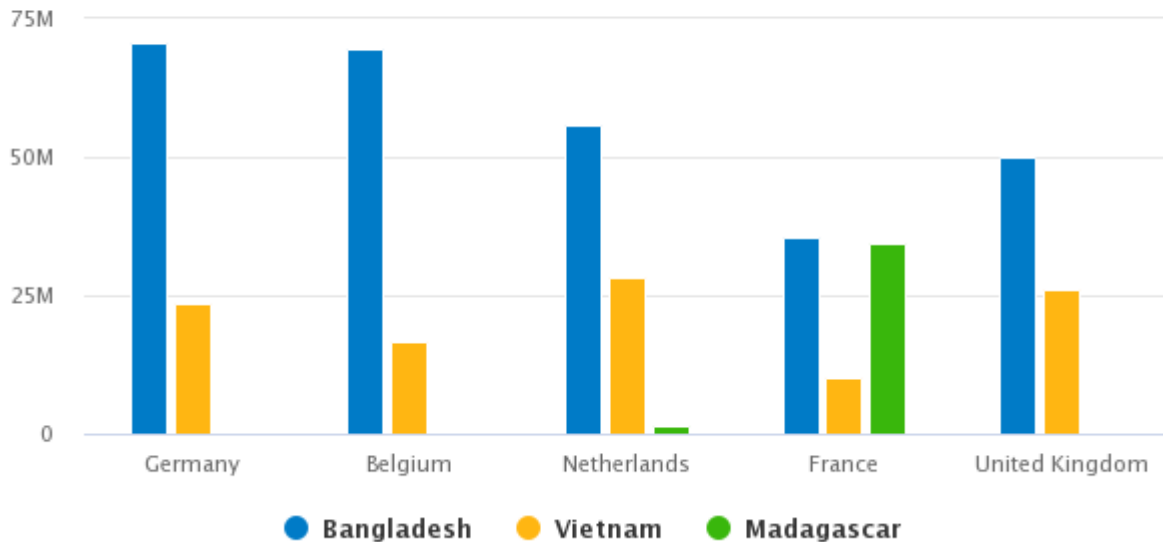
Investigate product reputation from the main black tiger sourcing countries and understand how your product compares, in terms of quality, colour, texture size, taste and price. Look into industry news sites, like [Undercurrent News](#) and [SeafoodSource](#), for information.

3. Which European countries offer most opportunities for farmed black tiger shrimp?

The European market for farmed black tiger shrimp is geographically more concentrated than the market for Pacific white shrimp. The Netherlands, Belgium, Germany, France and the United Kingdom are the biggest markets. In 2018, these countries combined imported US\$420 million to \$450 million worth of black tiger shrimp, accounting for more than 90% of total European imports of black tiger shrimp. The market for farmed black tiger shrimp in Southern Europe is limited due to unfamiliarity with the species and a preference for wild-

caught species.

Figure 1: European black tiger shrimp import estimates 2018
in \$



Source: Seafood Trade Intelligence Portal based on EUROSTAT and COMTRADE

The Netherlands, Belgium and Germany: an interconnected group of markets

The Netherlands, Belgium and Germany are interconnected markets, as the ports of Rotterdam, Antwerp and Hamburg are strategically located for all three markets. An importer from the Netherlands may import through Antwerp, an importer from Germany might import through Rotterdam. It all depends on logistical preferences. In terms of consumption, Germany is the biggest shrimp market, followed by the Netherlands and Belgium. However, in terms of imports, the Netherlands and Belgium play an equally important role.

In 2018, these three markets imported black tiger shrimp at a total value of US\$266 million, making it by far the biggest market block for black tiger shrimp in Europe. For a long time Belgium, which has a more sophisticated culinary culture than the Netherlands and Germany, was the biggest importer of black tiger shrimp of these three markets, but Belgium's imports declined rapidly over the past couple of years. Most black tiger shrimp is now imported into Germany where it sells mainly into its large wholesale market.

It is rare to see black tiger shrimp in the retail segment in these markets. The vast majority of the exotic shrimp assortment in the retail market consists of Pacific white shrimp. One exception is Belgium based retailer [Colruyt](#), which is known for its broad shrimp assortment and still sells a lot of black tiger shrimp besides its cheaper Pacific white shrimp offerings. If retailers still have black tiger shrimp in their assortment, it is almost exclusively sourced from Vietnam, which supplies more than 95% of worldwide available ASC-certified black tiger shrimp.

The majority of black tiger shrimp imported into these markets will be sold in the wholesale market, where black tiger shrimp is positioned as a premium product, compared to cheaper Pacific white shrimp products. With Pacific white shrimp prices going down, broadline wholesalers increasingly chose it over black tiger shrimp when the same sizes are also available. However, at the sizes bigger than 26–31 HOSO pc/kg, where Pacific white shrimp is not readily available, black tiger shrimp still is a standard item.

In Europe's ethnic Asian wholesale markets, black tiger shrimp has a stronger position than in the broadline wholesale market. Asian restaurants often favour the species and are less willing to shift to cheaper Pacific

white shrimp. Especially the larger sizes of HOSO black tiger shrimp still have and are expected to maintain a strong position in Asian wholesale markets in the Netherlands, Germany and Belgium. Other black tiger shrimp products, like headless shell-on blocks and peeled products also still have good penetration in these countries.

In the Netherlands, key buyers of black tiger shrimp include [Seafood Connection](#), [Dayseaday Fisherman's Choice](#) and [W. G. den Heijer](#). In Belgium, some of the key buyers of black tiger shrimp include [Hottlet Frozen Foods](#), [Thalassa](#) and [Solea International](#). In Germany, black tiger imports are dominated by companies like [Anduronda](#), [Lenk](#), [Hafro](#) and [Rassau](#).

Tip:

If you are a producer of black tiger shrimp interested in the retail market in Germany, the Netherlands and Belgium, look into ASC or other industry standard certification schemes, such as Global GAP.

France's large and diverse market

In 2018, France imported 100,000 tonnes of shrimp worth US\$900 million. Raw or blanched peeled products and raw or cooked HOSO products account for 90% of the warm water shrimp imported by France, while cooked peeled or further value-added products made up only 10%. Pacific white shrimp accounts for approximately US\$500 million or 70,000 to 75,000 tonnes of all raw or blanched peeled and raw or cooked HOSO products, being by far the most consumed shrimp in France, where black tiger shrimp is also a niche product.

In terms of culinary culture, France is a large, diverse powerhouse of cuisine, with diverse eating habits and various cooking cultures in different parts of the country, in and out of home, mixing in varying degrees the habits of consumers in Southern Europe and those in the rest of Europe. This means that the French shrimp market is quite diverse, both in terms of product types in which shrimp products are offered (a broad mix of cooked and raw, and HOSO and peeled products), as well as in terms of the numbers of species and origins of shrimp on offer.

Much like consumers in North Western Europe, consumers in France are also very concerned with sustainability. Most French retailers and institutional food service companies have committed to only sell sustainable seafood, meaning that they have committed to selling [ASC](#)-certified products. In some cases, these companies also accept other labels such as [Label Rouge](#) or [Friends of the Sea](#). France is also Europe's biggest market for organic shrimp.

Madagascar's black tiger shrimp exporters [OSO](#) and [Unima](#) have a historical relationship with the French market and their own distribution channels — OSO has a joint venture with [R&O Seafood Gastronomy](#) and Unima has its own European distributor, Unima Distribution. Madagascar shrimp is recognised for sustainability, production methods and conservation of mangrove forests. While OSO is the biggest supplier of organic certified shrimp in France, Unima supplies shrimp under the French Label Rouge.

French importers source other black tiger shrimp products from Bangladesh and Vietnam. Bangladeshi black tiger shrimp is mainly directed to France's ethnic Asian wholesale market, while Vietnamese black tiger shrimp, often ASC certified, will be sold into the high-end wholesale and retail markets.

This distinction will remain the same while Bangladesh cannot supply ASC-certified shrimp. Despite a near-organic production system, Bangladesh's fishing sector is not yet organised enough to take advantage of the recently launched ASC certification system for smallholder shrimp farmers. That said, many French buyers have expressed interest in starting to source from Bangladesh or other origins, as soon as they are ASC certified.

Key buyers of black tiger shrimp for the French market include [Argis](#), [Escal](#), [Gelazur](#) and [Crustamar](#). Importers for the ethnic Asian wholesale segment in France include [Paris-store](#), [Wanly](#) and [Gel Peche](#).

Tips:

Read [our study on trends in the European fish and seafood market](#) to learn more about ASC certification.

Read about [the challenges and opportunities Bangladeshi producers have](#).

Work towards ASC certification or other reputable certification schemes to gain market share. Certification is not yet an absolute requirement to gain access to all markets in Europe, but it will be in the future. If you are a small or medium producer, look into [ASC's group certification](#) and see if there are any opportunities for you there.

United Kingdom: Europe's fifth largest black tiger shrimp importer

Having large communities of West African and South Asian background, the United Kingdom has very strong links to several countries in Asia and West Africa, where black tiger shrimp was historically caught by shrimp trawlers and produced in traditional pond-based trap and hold systems. People in those communities continue to have a strong preference for black tiger shrimp on their menus. As a result in the British ethnic wholesale and retail market, but also in some mainstream retailers, black tiger shrimp is still an important product.

In the United Kingdom's ethnic Asian market, it is common to see black tiger shrimp in various forms from brands owned by exporters from Bangladesh, or in some cases from India. Various British ethnic Asian wholesalers also have their own shrimp processing facilities in Bangladesh. Examples of these companies include [Seamark](#), [Total Foodservice](#) and [Euro Foods](#). Some of these companies import shrimp from Bangladesh as a raw material, process it in the United Kingdom, then sell it as refreshed products. Most other importers import a finished product and sell it as such.

Both in broadline food service and in retail, black tiger shrimp has a relatively strong position in the United Kingdom. However, much like in continental North Western Europe, certification is a must, particularly in retail. As a result, the black tiger shrimp distributed in retail in the United Kingdom will be sourced from Vietnam. Just like in France, several importers have expressed the desire to source from other countries, especially from Bangladesh, as soon as their ASC-certified shrimp is available.

Some importers of black tiger shrimp into the United Kingdom, in addition to those that own their own plants in Bangladesh, include [Lyons Seafoods](#) and the [The Big Prawn Company](#).

Tips:

Visit the [Seafood Expo Global](#), held in Brussels in 2020, but moving to Barcelona in 2021. As a visitor you can meet new potential clients, and if your budget allows, you can participate as an exhibitor, which normally attracts business partners to you.

If you attend the Global Seafood Expo, keep in mind that Paris and Lille, in France, are just a short train ride away. There, you can visit some of the major French retail shops like [E. Leclerc](#), [Auchan](#) and [Carrefour](#) and study their shrimp assortments in the refreshed and the frozen segments to see how your black tiger shrimp products might fit in.

Use your time wisely and try to visit some of Belgium's retailers and wholesalers to check the differences in product offerings in both countries. Analyse the differences in prices and offerings of

black tiger shrimp and Pacific white shrimp to see how yours can compete.

Take a look at [our detailed study of the ethnic fish and seafood market in Europe](#), so you can learn more about a potential market for your products.

4. Which trends offer opportunities or pose threats in the European black tiger shrimp market?

European end users, and your clients by consequence, are changing what they demand from their suppliers in terms of sustainability, certifications, in addition to placing increasing importance on storytelling. At the same time, increasing global production of Pacific white shrimp and negative trends, like mislabelling, put pressure on the bottom line of producers. Being aware of how these trends affect your business is an important ingredient to success in Europe.

Oversupply of Pacific white shrimp a problem for black tiger shrimp too

Pacific white shrimp prices are going down and expected to stay low, so the market for black tiger shrimp is confronted with downward price pressure as well. Certain market segments have a true preference for black tiger shrimp over Pacific white shrimp, but there is a tipping point where the price gap is big enough that clients switch in favour of Pacific white shrimp. This is especially the case for those sizes in which black tiger shrimp and Pacific white shrimp overlap (from 26–31 HOSO pc/kg up to 41–50 HOSO pc/kg).

For the bigger sizes, meaning larger than 26–31 HOSO pc/kg, black tiger shrimp has a stronger position as there is no competition from Pacific white shrimp, and other alternatives are often more expensive. This size range, where Pacific white shrimp does not compete, may grow. Most Pacific white shrimp producers around the world tend to focus on slightly smaller sizes because of the additional environmental and disease related risks they are confronted with when growing shrimp for long enough to reach larger sizes.

If you want your black tiger shrimp to compete with Pacific white shrimp where sizes overlap, it is increasingly important to support your clients in promoting your product as a premium item. This can be achieved by highlighting the darker colour, stronger flavour and better texture of black tiger shrimp compared to Pacific white shrimp, but also the sustainability of your production methods.

The positive side for black shrimp producers is that the global supply volume has come down along with the decline of its market position. Farmers who previously produced black tiger shrimp in semi-intensive production systems have now almost all switched to producing Pacific white shrimp, which provides farmers with semi-intensive production systems under better production economics. The fact that almost all black tiger shrimp is now produced by extensive producers alone is an opportunity for you. More on this below.

Tip:

To understand the positioning of black tiger shrimp versus Pacific white shrimp in Europe a bit better, compare the pricing and marketing of the two species on [the online shop of Belgium retailer Colruyt](#). Look for the products referred to as [black tiger gamba](#) or [tiger scampi](#).

Branding and storytelling growing importance

European consumers want to know more about the products they consume. They take interest in the

background of sustainability and origin of the products they buy. Since black tiger shrimp has become a niche product in the European market, storytelling is an important factor in the potential for premiumisation.

Black tiger shrimp has at least three unique selling points that help to build a story: 1) it is almost entirely produced in extensive production systems, including the potential of mangrove integrated shrimp farming in contrast with the more intensive production of Pacific white shrimp; 2) it is almost entirely produced by small-scale farmers in contrast with the wealthier and bigger Pacific white shrimp farmers, and 3) it is widely known for its premium taste, colour and texture as opposed to the often described as paler and less tasty Pacific white shrimp.

To set your product apart, you need to show your customers and the consumers in the market that it is worth paying a higher price for a comparable product. Malagasy shrimp exporters OSO and Unima have succeeded in this by telling the story of the extensive shrimp farming sector in Madagascar and by achieving, respectively, organic and Label Rouge certification. Combining a strong verifiable story with a recognised certification is a strong competitive advantage in the European market.

What is important is that by investing in marketing your shrimp as more sustainable or of higher quality than the shrimp of your competitor you can realise better margins in the market. Think about the unique selling point of your product and your production and how you can better promote it in the market.

Tips:

Take a look at the websites of [R&O Gastronomy](#) and [Unima](#), which both attempt to present their products as the most sustainable shrimp available in the market.

Read [our study on trends in the European fish and seafood market](#) to better understand the effects of branding and storytelling on consumer choices.

ASC certification required in most retail markets

Since ASC implemented its shrimp standard in 2014, the number of ASC-certified shrimp products on the market expanded from only 500 products in 2014 to 1,500 products in 2015, then to 2,650 products in 2016, growing to 4,590 products in 2017 and almost 7,500 products in 2018. While commitments to sell ASC-certified shrimp started with retailers in North Western Europe, the deals soon extended to France, Spain and Italy. In the last two years, the number of ASC products on the Eastern European market has also expanded.

The biggest market for certified products is still in North Western Europe, but it is clear that within a few years, all of Europe, at least at retail level, ASC will become a hard market access requirement. Although commitments by food service companies and wholesalers are still less common, in the markets where retail adoption of ASC has taken hold, ASC-certified products are showing growth through new commitments in wholesale and food service as well. The same trend is expected to happen in Southern and Eastern Europe.

At this moment, ASC-certified black tiger shrimp is almost only available from Vietnam. There are some other farms in Nigeria, Tanzania, Australia and India that have been accredited more recently, as well, but these only represent a minor volume. If you are a black tiger producer from another origin than Vietnam, getting ASC certification is a big opportunity for you to enter the European retail and high-end wholesale markets. European importers eagerly await the opportunity to source from other origins, so they become less dependent on Vietnam.

Tips:

Check [the ASC's database](#) to see which black tiger shrimp farms have already been ASC certified.

Check the audit reports of these farms to get an understanding of what you are up to if you want to certify your farms or the farmers you work with, with the ASC standard.

Increased attention to labelling of glazing and soaking

Our [trends study](#) warns that problems with glazing and treatment of fish and seafood products are moving up the agenda of authorities and sector associations in North Western Europe. Within the European shrimp industry, tackling the mislabelling of shrimp products, especially peeled, has been increasingly debated, as importers that claim to be 'clean' complain that they are outcompeted by competitors that break the rules.

Producers from other origins are also involved, but Bangladeshi black tiger shrimp exporters have become a centre point in this debate. Although Bangladesh produces a super sustainable shrimp at farm level, issues in the supply chain, like broken cold chains, soaking and unhygienic practices, downgrade the quality of the products significantly. Mislabelling of glazing and treatment is also common practice in Bangladesh, mostly done on the request of European importers to sell into market segments where the only consideration is price.

Photo 1: Bangladesh European Union Shrimp Market Consultation



At a meeting in February 2019 in Utrecht, the Netherlands, a group of European importers gathered with a delegation of Bangladeshi shrimp exporters and government representatives. This meeting was focused on the question of whether Bangladeshi black tiger shrimp could be stronger positioned in the European market. It became clear that many European importers acknowledge the premium proposition of black tiger shrimp

including from Bangladesh. They acknowledge that there will always be a market for it in Europe, maybe even premium.

However, during the meeting it also became clear that as long as these malpractices are not banned, it is impossible to reposition black tiger shrimp in the European market. Black tiger exporters wishing to distinguish themselves need to abolish these practices and communicate that openly. Only once that is done, and trust in the market is gained, black tiger shrimp's unique selling points will come to value.

It is important to emphasise, once more, that although in the short term it may have benefits in terms of market share and margins, in the long term, if you apply malpractices yourself, this will have a negative impact on your reputation. It may even have economic consequences, such as fines imposed on you or your country of origin.

Shrimp importers sometimes point to the European poultry market as a comparatively 'dirty' market. In the last decade, however, Europe's poultry market has become heavily regulated and malpractices are now rarely seen. The same is expected to eventually happen in the shrimp and broader fish and seafood markets.

Tips:


Read [our study on trends in the European fish and seafood market](#) to better understand the risks that mislabelling creates.


Read [our news item about the European Union's position on the issue of glazing and soaking](#).


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