

Exporting octopus to Europe

Octopus is mainly consumed in Southern European countries such as Italy and Spain. Europe mostly depends on imports from North African countries such as Morocco and Mauritania and European countries such as Spain and Portugal. The supply of octopus also comes from other countries such as Mexico and Indonesia, although imports from these countries are relatively lower. If you want to export octopus to Europe, the best opportunities are to approach importers in Spain and Italy.

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1. Product description

Octopus is the collective name for several species with the scientific name Octopodidae, but in most cases they refer to common octopus (*octopus vulgaris*). In most European countries, octopus is the common name, but in southern Europe other names such as Poulpe (France), Polpo (Italy), and Pulpos (Spain) are also used. When "octopus" is referred to in this survey, this concerns the following [Harmonised System](#) codes, unless stated otherwise:

- 030751 - Live, fresh and chilled octopus
- 030759 - Other octopus (frozen, smoked/cooked, and dried/salted)
- 160555 - Prepared or preserved octopus.

Packaging

Packaging requirements differ widely between customers and market segments. It is crucial that you discuss your customers' preferred packaging requirements with them. Some general characteristics are:

- Octopus is sold in different types of products such as:
 - Whole raw frozen
 - Cooked
 - Boiled (whole or only the legs).Or various types of processed, value-added products (marinated, in oil, brine, or with garlic).
- Wholesale packages are supplied in block frozen or individually quick frozen (IQF) and can be delivered in polybags of different weights (1,2,5, 10 or 15 kg),
- In retail, packaging depends on the product type. Raw frozen products are mostly packaged in polystyrene trays or plastic bags of up to 1 kg. Cooked or boiled octopus is often sold in vacuum bags, while most value-added products are sold in smaller carton boxes up to 500 grams.

Picture 1: Wholesale packaging with polystyrene tray, octopus, 1 piece of 0.8-1.0 kilogram, Germany.

Picture 2: Wholesale packaging with polystyrene tray, small octopus, 1 kilogram, Germany.



Labelling

There are specific labelling requirements for fish sold in the European Union. In addition, under new rules that went into effect in December 2014 (Directive 1379/2013), labels must provide precise information on the harvesting, used fishing gear, and production of the products. This applies to all unprocessed seafood, as well as to some processed seafood, regardless of whether it is pre-packed. The information must be provided on the labelling or packaging of the fishery product. Or by means of a commercial document accompanying the goods.

Tip:

See our study [EU Buyer requirements for Fish and Seafood](#) for more information about labelling requirements.

2. Which European markets offer opportunities for exporters of octopus?

Most octopus consumed in Europe is supplied by Spain and Morocco. Spain is also in the top 3 of markets offering opportunities for exporters from developing countries, together with Italy and Portugal.

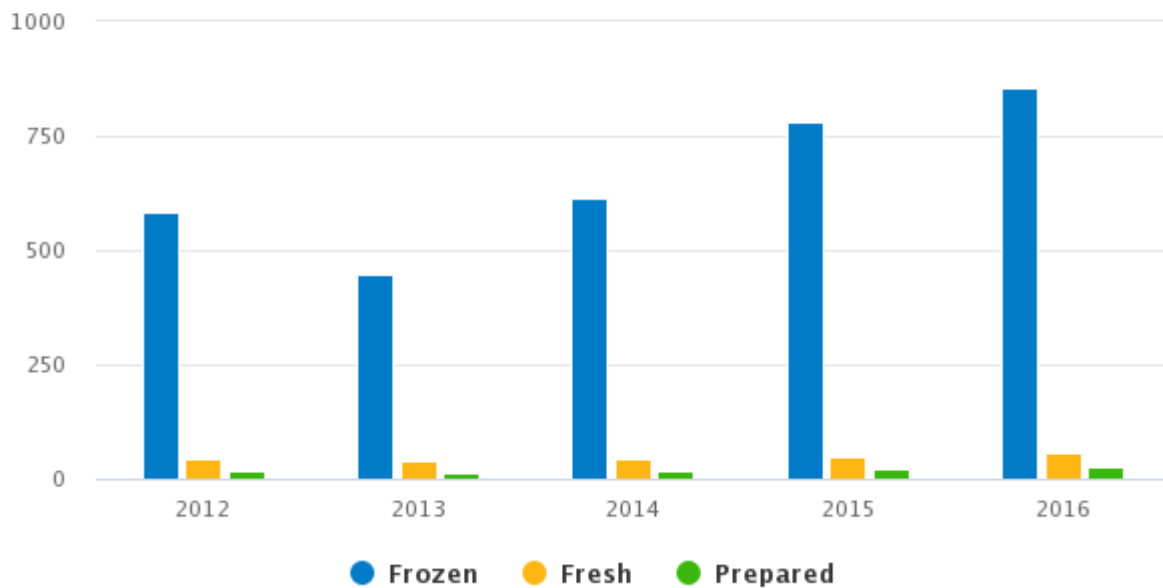
Imports

European imports of octopus increased by 9.8% per year on average in 2012–2016. In 2016, European countries imported a total of €937 million of octopus. Over 90% of imports of octopus into Europe were the frozen variety (€856 million).

The volumes of live, fresh or chilled, smoked and cooked, dried or salted, and further prepared octopus are rather small. The share of dried, salted, smoked and cooked octopus is estimated at around 1% of all imported octopus. This is because most of the processing and value-addition for end markets is done by European companies in European facilities, using frozen octopus as input.

Figure 1: European import of octopus, by type of product

in € million



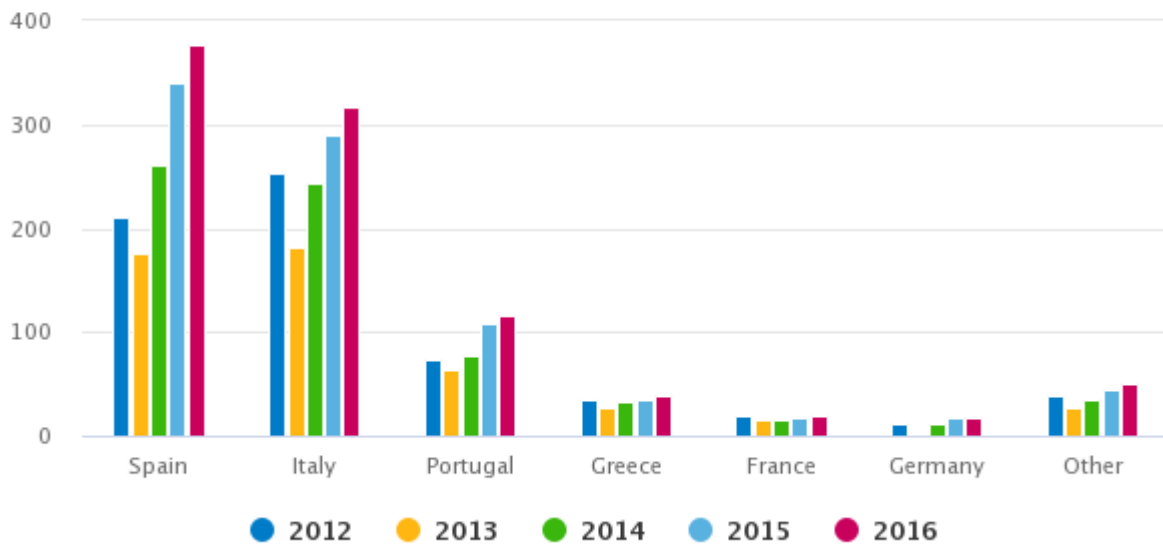
Source: Trademap 2018

Spain was the largest European importer of octopus in 2016. With €377 million import value, the country had a 40% import share. From 2014 to 2016, Spain realised high annual growth rates (respectively 48%, 30% and 11%). Italy and Portugal complete the top 3 of European importers of 2016, with respectively €316 million and €116 million imports in 2016. Other significant importers of octopus included Greece (€39 million), France (€20 million) and Germany (€18 million).

The countries with highest average annual growth in 2012-2016 included Spain (16%), Portugal (12%) and Germany (10%). In 2012-2015 the average European import prices varied between €3.70 and €6.00 per kilogram, while in 2016 prices climbed sharply and resulted in average import prices reaching €6.80 to €7.00. Developments in European import values and volumes must be seen in the context of the global market for frozen octopus. It depends on the balance in demand and supply, but also on additional factors such as the exchange rate of, for example, the Japanese yen and the US dollar versus the euro.

Figure 2: Leading European importing countries of frozen octopus, 2012–2016

in € million



Source: Trademap 2018

Leading suppliers and price developments

Morocco and Spain are the leading suppliers of octopus to the European market. Together, they represented 58% (€543 million) of the total European supply of octopus in 2016. Other suppliers are Mauritania (€106 million in 2016), Portugal (€57 million), Mexico (€47 million) and Indonesia (€32 million). Imports from developing countries are dominated by Morocco (€374 million).

In 2015 and 2016, the volume of Moroccan exports of octopus to Europe reached 46,400 tonnes and 45,550 tonnes respectively. This was considerably higher than the volumes in 2012, 2013 and 2014 (22,900 tonnes, 41,400 tonnes and 31,000 tonnes respectively). Not surprisingly, the price of these imports was highest in the years with low supply volumes. Prices of imports coming from Morocco in 2014 were 50% higher than in 2013 (€6.50 versus €4.33). Prices remained relatively stable in 2015, as on a global scale demand and supply reached the same balance as in 2014. Imbalances between demand and supply can lead to temporary peaks and lows in prices. In Europe this happened in 2011 (high prices; average import price of €5.89 per kilogram), 2013 (low prices; €3.74), and 2016–2017 (explained in “Trends”). The price in Europe depends on:

1. Particularly the market situation in Spain and Italy.
2. The supply situation in Morocco in the first place, followed by the supply situation in Spain, Portugal and Italy.
3. The international supply and demand balance.

Tips:

The TARif Intégré Communautaire; Integrated Tariff of the European Communities (TARIC) database shows more details about import duties for Chapter [0307](#) and [160555](#).

If you want to export octopus to Europe, the best opportunities are to approach importers in Spain and Italy. Also because these companies also sell octopus to other countries in Europe.

If you approach these companies, it is also important that you are able to sell other cephalopods, such as cuttlefish and squid.

The [European Market Observatory for Fisheries and Aquaculture Products](#) (EUMOFA) helps you to get

a better view of the European fish and seafood market. Among other things, the website offers information about consumption of seafood in the different European countries.

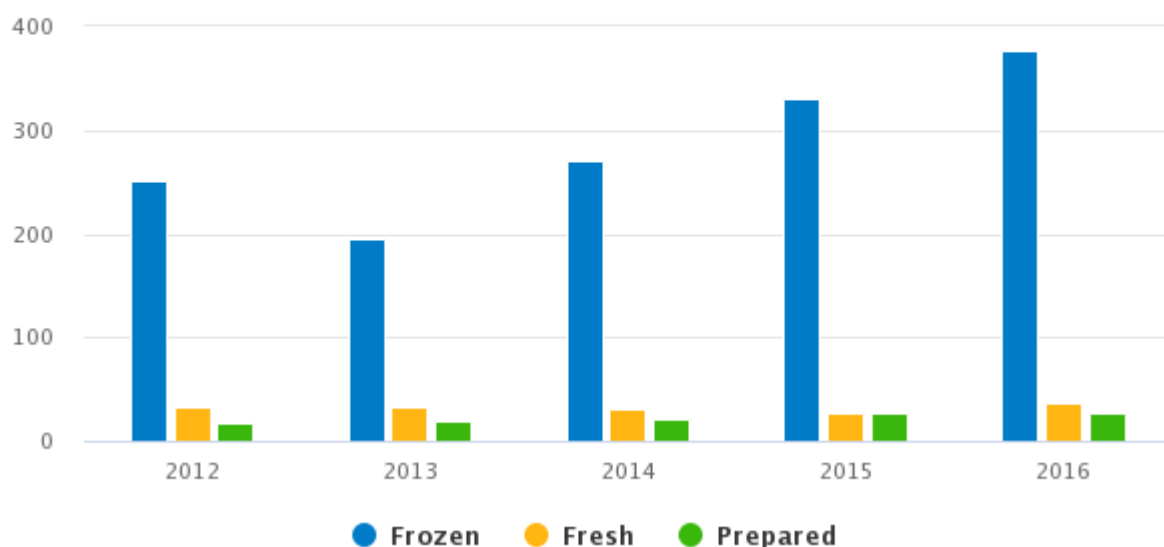
Exports

Total European export of octopus amounted to €441 million in 2016. Exports grew by 9.9% on average annually in 2012-2016. After a serious decline of 18% in 2013, exports of octopus from Europe have been increasing every year.

Intra-EU trade accounts for about 75-85% of this value. The exact share is difficult to calculate, as Portugal, Spain and Italy also have octopus fleets and thus local production.

With 85% export share, the frozen variety represents the lion's share of total European octopus export. Fresh octopus exports reached €36 million in 2016 and prepared products accounted for €28 million. The European exports are mainly re-exports to other European countries of frozen products originally imported from outside Europe.

Figure 3: European export of octopus, by type of product, 2012-2016
in € million



Source: Trademap 2018

Spain is the largest European exporter of octopus (€256 million in 2015, 58% of total European exports). Other important exporters are Portugal (€128 million) and Italy (€29 million), while Greece (€7.7 million), Belgium (€4.3 million) and France (€4.0 million) complete the top six exporters.

Trade of octopus within Europe primarily occur between the main octopus markets: Spain, Italy and Portugal. In 2016, Spain exported 11,300 tonnes of frozen octopus to Italy and 8,600 tonnes to Portugal. In turn, Portugal exported 13,100 tonnes to Spain.

Production

2014 was a top year in terms of octopus landings worldwide, reaching the highest level since 2009. Supplies have remained relatively stable in 2015, resulting in relatively stable prices (as previously mentioned) in

Europe. Supplies in 2016 and 2017 were down on average, with particularly Morocco, the largest supplier to Europe, being affected by lower catches in 2017.

The main countries that catch octopus for the European market are Morocco, Mauretania, and Mexico. Within Europe, the main producers of common octopus are Portugal, Spain, and Italy. In the period 2010-2013, their respective catches of common octopus were 9-10, 2-4 and 3-4 thousand tonnes per year respectively. Portuguese catches statistics for 2014 and 2015 are available; these show a considerable decline, with 6,000 tonnes in 2015. For Spain, data for 2016 show a record volume of 3 thousand tonnes.

Tip:

More information about octopus's supplies can be found on [Globefish](#). Here, you can find the latest developments that can help you to sell your products to the most promising market.

Consumption

Octopus products are mostly consumed in southern Europe. Also the import statistics show the dominance of southern Europe. The main reason is that consumers in these countries are familiar with the product. In Spain, 1.5 kilograms of octopus, squid, and cuttlefish were consumed per capita in 2011, for instance.

In the rest of Europe, consumption is much lower. In northern Europe, octopus is more often sold in certain market niches such as restaurants with an Asian or Mediterranean kitchen. However, as especially younger people are increasingly open for these types of restaurants, you may have small opportunities to sell small amounts of octopus to countries in northern and western Europe.

In general, the consumption of octopus in Europe is relatively stable, also proven by an analysis of long-term import statistics. At the same time, the all-time peak in European imports in 2016 indicates a long-term upward trend in consumption.

Tips:

Discuss with your clients which countries and market segments can be interesting target markets.

Discuss with your clients if there are specific market niches in northern and western Europe that might have a potential interest in octopus products.

3. What trends offer opportunities on the European market for octopus?

Sustainability certification for octopus fisheries

There are concerns about the level of sustainability of some octopus fisheries in northern Africa. Some stocks are possibly overexploited. Sustainability certification can be a means to improve fishery practices, make the fishery more sustainable, and to improve the image.

Since 2016, one octopus fishery in the world (from Spain) has been certified by the Marine Stewardship Council (MSC), while since 2013 there has been a single Friend of the Sea (FOS) certified hook fishery in Indonesia. If you are able to become one of the first exporters of certified octopus in the next years to come, this can give

you opportunities to sell to new clients or obtain access to other market segments.

MSC also launched a new project in 2017 to map the octopus fishing in the western Indian Ocean using the MSC Fisheries Standard. It aims to identify opportunities to improve the sustainability of fisheries in African countries such as Madagascar, Kenya, Tanzania, Zanzibar, Mozambique, Rodrigues and Comoros.

Tips:

Discuss with your suppliers if they are interested in becoming certified by [MSC](#) or [FOS](#), which is an Italy-based fisheries and aquaculture certification scheme. Non-governmental organisations (NGOs) like [World Wildlife Fund](#) (WWF) are potential partners in the process towards certification, through so-called Fishery Improvement Projects (FIP).

Read up on the MSC project on [sustainable octopus fishing in the Western Indian Ocean](#) if you source octopus from this region.

Initiatives for aquaculture production

In several countries, such as Spain and Chile, there are currently initiatives to develop the aquaculture production of octopus. In 2017, a Japanese company succeeded in hatching eggs of fully farmed octopus using artificial incubation. The company hopes to be able to supply the Japanese market by 2020. If aquaculture production of octopus proves to be economically feasible in the long run, this can have important effects on the global market for octopus.

Fluctuating octopus market

In 2017, a low supply combined with high demand lead to record prices on the global market for octopus. Low catches and a limited quota in Morocco especially drove up the price. This trend is reportedly continuing into 2018. However, passing on these high octopus prices to consumers is proving difficult. This means they mainly affect traders' margins.

Tip:

Reflect on how to add more value to your products, to make them more interesting for the European market.

4. What requirements should octopus comply with to be allowed on the European market?

Requirements can be divided into: (1) musts which are requirements you must meet in order to enter the market. This can be legal and non-legal requirements. (2) common requirements which most of your competitors have already implemented. In other words, the ones you need to comply with in order to keep up with the market. And (3) Niche requirements for specific segments.

See our study [EU buyer requirements for fish and seafood](#) for a general overview of requirements and for more information about relevant sources. For example, the list with EU-approved countries and information on the catch certificate.

Common requirements

For octopus, common requirements that buyers have are mainly food safety requirements. The most commonly requested food safety certification schemes for seafood products are [International Food Standard \(IFS\)](#) and (or) [British Retail Consortium \(BRC\)](#), and for farmed products also [GLOBALG.A.P.](#)

Tips:

See our [10 tips for doing business with European buyers of fish and seafood](#) and our [10 tips for finding buyers in the fish and seafood sector](#). These tips also offer more information on which topics are decisive for European buyers when searching for (new) suppliers.

Relevant sources that may be helpful for you in gaining access to the European market are: [EU Trade Helpdesk](#) to find information related to European requirements, tariffs, statistics and preferential arrangements and the [ITC Sustainability Standards Map](#) for standards related to sustainability.

Niche market requirements

In Europe, sustainability certification for octopus is still seen as a niche market requirement, although sustainability certification has become a buyer requirement for a considerable range of fish and seafood products in Western and Northern Europe. For octopus, the major certification scheme is ran by the Marine Stewardship Council (MSC), while another sustainability certification is Friend of the Sea (FOS), as mentioned earlier.

5. Through what channels can you get octopus on the European market?

Generally, developing country exporters of octopus enter the European market through large traders such as importers, processors and wholesalers.

Octopus is mostly imported into Europe as a frozen product. Most secondary processing and other value-adding activities occur at seafood processing companies in Europe. Most large retailers and food service companies that sell octopus do not source the product themselves. Instead they make use of a few large importing and wholesaling companies as their preferred suppliers.

Retail groups in Europe often have different formulas, varying from premium supermarkets to discount stores. In most cases each formula has its own purchasing and distribution systems and retail outlets.

Tip:

It is crucial to be aware of the differences between the requirements for the retail segment and food service segment (e.g. packaging, weight, size, preparation), if you want to export products to the European market. Also it is important to know the trade structures in the different European countries.

6. What are the end-market prices for octopus?

Consumer prices of octopus products in the different European countries are presented below to give you an impression of the price level in Europe.

Table 1: Examples of prices for octopus products in European countries, 2016 / 2018

Product	Price (€/KG)	Country
Frozen octopus	10.95*	Spain
Frozen octopus in plastic container	7.49 - 15.08 / 8.99 - 14.99	Portugal, Germany
Whole raw octopus	8.99 - 11.06 / 13.99 - 11.06	Portugal, Spain
Whole cooked octopus	22.95*	Spain
Cleaned octopus	14.95 / 14.95	Italy
Cleaned octopus in plastic packaging	11.24 / 9.99	Portugal
Cut octopus packed in a paper box	27.96 / 26.52	Spain
Cut octopus in plastic container	18.99 / 26.99	Portugal
Cut octopus in olive oil packed in a paper box	20.87 / 26.99	Spain
Cut octopus in garlic sauce packed in a paper box	14.92 - 19.07 / 15.92 - 19.07	Portugal, Spain
Cooked octopus's legs in vacuumed packaging	24.20*	Spain
Octopus salad in plastic container	39.27 / 46.60	Italy

Source: Globally Cool, 2018 * No change.

The margins in the value chain vary a lot from low-end to high-end products. For low-end products, margins can be as low as 5% for each company, with a retail margin as low as 10%. For high-end products, these margins can be as high as 20-25% for fishermen and processors, and 100% for importers and retailers.

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