PORTUGAL

OVERSEAS MARKET INTRODUCTION SERVICE

SEA FISH INDUSTRY AUTHORITY

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1. SUMMARY

Seafish has commissioned our OMIS services to update the existing market report on Portugal available on http://www.seafish.org/processors/market-insight/seafood-export-profiles. Using the official statistic sources, trade associations and other relevant entities we have updated the report as shown below.

In a number of cases we could find relevant information referring to 2011/2012 and therefore we have updated the report with the most recent information available. In all cases we have identified the year data refers to. The tables *Foodservice Supply Chain* (Page 13) and *Labelling/Packaging Regulations* (Page 14) are the same as on the previous report.

Should you require further information please do not hesitate to contact us.

SEAFOOD EXPORT PROFILES PORTUGAL

SECTION 1

MATCHING PROFILE

1.1 THE TRADE ENVIRONMENT

FAST FACTS

Source: INE

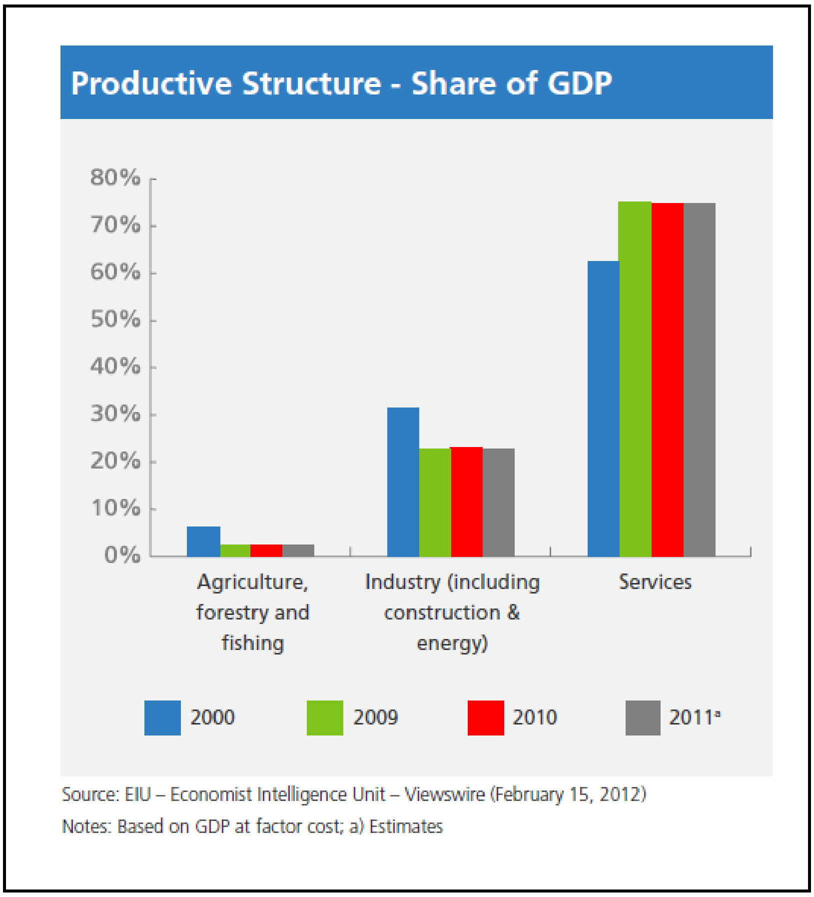
Population: 10.6 million
Land area: 91,470 sq km
Inhabitants per sq km: 115
Number of households: 4.0 million
Capital: Lisbon
Other main cities: Porto, Amadora, Coimbra, Braga
Languages: Portuguese
Religion: Catholic
Currency: Euro (€)
Exchange rate (2012 average): €:£ = 0.81087
Nominal GDP (2011): US$ 237.8 billion
Real GDP growth rate (2011): -1.7%
GDP per capita (2011): US$ 22,359
Inflation growth rate (2011): 3.6%
Unemployment (2011): 12.7%
Share of GDP: 73.6% Services; 24% Industry; 2.4% Agriculture
International status: Member of the European Union (EU)
Government type: Democratic republic
Total food and drink industry imports 2011: 7.711 billion € (£6.253 billion) (13% of total)
Total food and drink industry exports 2011: 4.238 billion € (£3.437 billion) (9.9% of total)
Top import countries (for food and drink industry): Spain, France, Germany
(Source: Gabinete de Estratégia de Estudos, Ministério da Economia e Inovação)
Exports of goods to UK 2012 ($US m): 2,998.6
Imports of goods from UK 2012 ($US m): 2,679.7

- Portugal is currently under a bailout agreement signed between the Portuguese State and the European Commission/International Monetary Fund/European Central bank. Recession has sent the unemployment rate to record highs at 15.8% and consumer confidence stands close to a record-low for at least 15 years.

- The current coalition government will have to post a budget deficit of 4.5 percent of gross domestic product in 2013 and the Portuguese will face their largest hike in taxes in modern history to meet the budget goals. At the same time, a rise in exports helped Portuguese economy by offsetting the fall in domestic demand.

- In 2011, Portugal will be rated 22nd in Europe (EU27) in terms of consumer per capita.

- In the past few decades, Portugal saw its economic development based on services. Currently this sector accounts for 62.8% of employment and 74.5% of gross value added (GVA). The agricultural sector only provides 9.9% of employment and contributes only with 2.1% of GVA. Industry, construction, energy and water represent 27.3% of employment and 23.3% of GVA.



Sources: INE, IMF World Economic Outlook, AICEP – Portugal – Country Profile 2012

1.2 THE SEAFOOD SECTOR

- Imports of seafood to Portugal in 2011 accounted for €1.471 billion (£1.193 billion), corresponding to an increase of 7.7% when compared with 2010. The biggest annual increase in value occurred in the dry, salted and smoked fish (annual rate of change of +15.4%), +14.4% for live, fresh, refrigerated, frozen molluscs and +4.2% for frozen fish.
- Although frozen fish value was reduced -0.7% in comparison with 2010 it still remained as the major group of seafood from external markets (22.2%). On the other hand, the dry, salted and smoked fish increased 1.5% reaching 21.9% in 2011 (19.2% of those concerning salted codfish – dry and undried)
- The major supplier of the Portuguese market for frozen fish, fresh/refrigerated fish, live/fresh/refrigerated/ frozen molluscs continued to be Spain (51%, 59.1% and 51.8%) although there was a reduction compared to the previous year. In terms of dry, salted and smoked fish Sweden continues to be the major supplier of this group (+1.8% than 2010).
- Spain is the main destination market of national fish products, concerning frozen, fresh and chilled, crustaceans and molluscs. Brazil is the main destiny of smoked and dried products, while France and UK are the most important destination markets for frozen and canned fish.
- The annual price of seafood increased 6.3% when compared to 2010. The rise of sea fish prices was responsible for this, namely with sardines (+18.6%), Atlantic mackerel (+26.3%) and tuna (+16.5%). The medium price of molluscs also increased (+28%) mainly due to octopus and cuttlefish cost rise. Crustaceans had a break of -21.7% mainly due to the fall of price of shrimps.
- The contribution of fishery sector in Portugal to GNP is less than 1.5%, representing 2.5 billion € (£2.02 billion) and employing 90,000 people. Fishery products represent 7% of consumer expenditure on foodstuffs and provide 12% of protein supply. In addition, the fishing industry is concentrated in small coastal communities, where it is an important socio-economic factor.

Table 1: Value of incoming and outgoing of seafood products

Description:	2011
Incoming products	
Dry, salty and smoked fish	22%
Frozen fish	22%
Others	21%
Fresh or refrigerated fish	15%
Molluscs (live,fresh, refrigerated, frozen)	14%
Preparation & canned fish	6%
Outgoing products	
Others	26%
Molluscs (live,fresh, refrigerated, frozen)	19%
Preparation & canned fish	18%
Fresh or refrigerated fish	16%
Frozen fish	13%
Dry, salty and smoked fish	8%

Table 2: Main species landed in Portugal, volume and value 2010-2011

Main species	Portugal		
	Volume (tonnes)	Value (1000€)	Value (1000£)*
Total			
2010 (h)	**166,304**	**271,972**	**220,534**
2011 (h)	**164,236**	**285,880**	**232,812**
Sea fish	**147,971**	**212,467**	**172,283**
Sardines	55,222	42,007	**34,062**
Tuna and similars	13,877	25,858	**20,968**
Horse Mackerel	10,024	17,256	**13,993**
Swordfish (black)	5,556	16,006	**12,979**
Mackerel	31,089	10,364	**8,404**
Crustaceans	**1,950**	**15,942**	**12,927**
Shrimp	1,067	8,625	**6,994**
Crabs	374	100	**81**
Molluscs	**14,223**	**56,274**	**45,631**
Octopus	7,272	36,213	**29,364**
Cockle	1,617	1,271	**1,030**

(h) Frozen and refrigerated fish
Source: Estatísticas da Pesca 2011, Instituto Nacional de Estatísticas
* Exchange rate (2012 average) €:£ = 0.81087

Table 3: Main species imported into Portugal, 2011

Main imported species	2011		
	Volume (100 Kg)	Value €	Value £
Cod	1017669	429,089,940	347,936,160
Shrimps	267346	133,688,708	108,404,163
Hake	256587	103,599,755	84,005,933
Squid	184838	47,474,479	38,495,631
Octopus	163795	97,454,705	79,023,097
Horse Mackerel	161749	21,100,367	17,109,655
Tuna	156197	24,517,333	19,880,370
Sardines	145206	19,259,392	15,616,863
Mackerel	131511	15,980,226	12,957,886
Salmon	84217	41,072,623	33,304,558
Sea bass	43645	21,891,798	17,751,402
Monkfish	37283	1,482,221	1,201,889
Crab	28875	10,612,889	8,605,673
Sea Bream	27050	12,592,106	10,210,561
Total Seafood	**3927120**	**1,371,781,832**	**1,112,336,734**

Source: Eurostat
* Exchange rate (2012 average) €:£ = 0,81087

Table 4: Key Ports in Portugal, by total volume handled, tonnes 2012

	Douro e Leixões Port (Porto)	Lisbon Port	Sines Port
Ships			
No. of ships	1302	1470	806
Gross tonnage	13.814.901	22.718.035	23.471.087
Goods handled	8.288.692	6.213.519	14.281.969
Loads (t)	3.227.563	2.413.417	4.712.127
Unloads (t)	5.061.129	3.800.102	9.569.842
Containers (no)	180.291	187.678	173.663
TEU´s	282.926	278.199	260.386
Cargo			
Fractioned (t)	402.633	73.305	48.218
Containers (t)	2932.659	2.809.810	3.183.799
Bulk solid (t)	1.173.478	4.423.095	2.839.748
Bulk liquid (t)	3.772.32	894.232	8.210.204
Ro Ro (t)	7.600	13.077	n/a
Fish catch (t)*	33.104	2.639	n/a

Source: IPTM- Instituto Portuário e dos Transportes Marítimos - Year 2012
* Source: APDL, Porto de Lisboa, Porto de Sines; Year 2011

Table 5: Imports of Seafood to Portugal by country 2010-2011

Products	Countries	2010			2011		
		tonnes	Value (1000 €)	Value (1000£)*	tonnes	Value (1000€)	Value (1000£)*
Fresh or Refrigerated Fish		**60,604**	**211,039**	**171,125**	**56,969**	**216,666**	**175,688**
	Spain	45,138	133,347	**108,127**	39,397	128,047	103,829
	Greece	4,387	24,513	19,877	4,210	24,177	19,604
	Sweden	2,593	11,317	9,177	5,105	20,563	16,674
Frozen Fish (except fillets)		**124,233**	**312,963**	**253,772**	**124,129**	**326,249**	**264,545**
	Spain	62,205	162,180	131,507	62,979	166,466	134,982
	Netherlands	11,989	28,131	22,810	19,778	48,554	39,371
	EUA	13,891	35,587	28,856	10,658	30,037	24,356
Dried, salted and smoked fish		**55,498**	**279,130**	**226,338**	**63,168**	**322,017**	**261,114**
	Sweden	30,037	150,691	122,190	32,746	179,714	145,725
	Netherlands	6,092	29,634	24,030	7,311	38,754	31,424
	China	6,241	21,129	17,133	8,563	28,124	22,805
	Spain	2,082	28,127	22,807	2,731	22,095	17,916
Crustaceans - Frozen, fresh, chilled, alive, etc.		**32,570**	**168,944**	**136,992**	**28,277**	**161,576**	**131,017**
	Spain	10,155	62,927	51,026	9,761	63,934	51,842
	China	5,459	16,384	13,286	4,064	13,729	11,132
	France	1,908	15,899	12,892	1,577	12,442	10,089
	Mozambique	1,971	10,700	8,676	1,478	9,165	7,431
	United Kingdom	2,255	8,308	6,737	2,075	7,475	6,061
Molluscs and aquatic invertebrates - alive, fresh, frozen, chilled, etc.		**55,524**	**180,210**	**146,127**	**56,638**	**206,202**	**167,203**
	Spain	26,928	100,935	81,845	26,814	106,889	86,673
	India	6,516	15,457	12,553	6,672	20,249	16,419
	China	3,699	11,133	9,028	3,776	11,855	9,613
	Mexico	3,205	11,336	9,192	2,064	11,460	9,292
	France	617	2,773	2,249	653	2,722	2,208
Canned fish and roes		**24,386**	**79,266**	**64,274**	**26,888**	**88,268**	**71,574**
	Spain	15 207	55 820	45,263	15 496	59 828	48,513
	Germany	2 938	7 891	6,399	2 883	8 652	7,016
	China	1,763	2,492	2,021	3,290	4,208	3,412
Canned crustaceans and molluscs, etc.		**3,465**	**14,578**	**11,821**	**4,042**	**17,526**	**14,211**
	Spain	2,076	8,965	7,270	2,613	12,682	10,284
	Chile	471	952	772	934	2,032	1,648
	Netherlands	328	1,868	1,515	154	896	727

Source: Estatísticas da Pesca 2011, Instituto Nacional de Estatísticas
* Exchange rate (2012 average) €:£ = 0,81087

1.3 CONSUMER TRENDS

- Seafood forms a core part of the Portuguese diet and it is considered a healthy habit. The consumption level of seafood in Portugal is one of the highest in the world. In 2010 Portugal ranked the 3rd country in the world with highest seafood consumption, just after Japan and Iceland. Data from 2012 indicates that Portugal consumes circa 61.6kg per capita which is almost three times more the average consumption of European Union (22.1kg).
- According to a report by *Ocean 2012** Portugal only produces one third of the seafood consumed. Therefore and due to the limitations of seafood shares inside the EU, the market will become more dependent on imports from non EU countries.
- Portuguese consumers prefer wild to cultured fish as well as fat to lean fish. Chilled fish is preferred over frozen, salted/dried, canned, and smoked fish, being the latter the least preferred. Soaked cod, hake, and canned tuna are the most eaten seafood products. Men prefer to a greater extent wild and smoked fish. Men consume more cephalopods and sardine and women eat more frequently hake, pink cusk-eel, and redfish. Coastal populations prefer wild fish. Algarve (southern Portugal) consumers exhibit a stronger tendency to wild and whole fish and consume more sardine and sole. Madeira archipelago consumers are particularly fond of black scabbard fish. (1)
- Cod continues to be a Portuguese tradition totalling 61,110 tonnes consumption in 2011, 13% more than the previous year. This is mainly due to the increase of prices of hake, sea bass, mackerel and sardine. Although the cod price has increased slightly, the cost was still lower in comparison to other products. Consumption patterns indicate that deep-frozen cod will continue to increase next couple of years together with ready-to-cook products.
- Also the consumption of fresh salmon has risen 29% in 2012 when compared with 2011.
- Over the last couple of years, consumption frozen products and ready-to-cook meals have increased among Portuguese consumers not only because of economic crisis, but also because life styles have changed.

  Source: New Economics Foundation - Ocean 2012 Transforming European Fisheries; Norge.

(1) Published by Elsevier Ltd., Cardoso C, Lourenço H, Costa S, Gonçalves S, Nunes ML- SourceUnit of Upgrading of Fishery and Aquaculture Products (U-VPPA), Portuguese Institute of Sea and Fisheries Research (IPIMAR), National Institute of Biological Resources (INRB)

Table 6: Frozen food market in Portugal, 2008-2009

	2008	2009	% 2008-09
Ice-cream	67.8	72.8	5.00
Potatoes	30.8	32.5	1.70
Prepared Meat	22.6	24.9	2.30
Non-prepared meat	35.5	36.1	0.60
Non-prepared seafood	84.4	86.5	2.10
Prepared seafood	58.3	56.6	-1.70
Pizzas	41.1	41.5	0.40
Frozen meals	32.1	35	2.90
Vegetables	52.6	52.1	-0.50
Savoury	71.1	71.6	0.50
Other	45.5	49.4	3.90
Total	**96.7**	**97.5**	**0.80**

Source: Kantar Worldpanel

1.4 UK SHARE AND EXPORT OPPORTUNITIES

- In terms of trade, the UK accounted for only 1.3% and 1.6% of the total value of imports (respectively) in 2010 and 2011. Moreover, exports of seafood from UK to Portugal had a decrease of 23.61% in value and 33.03% in volume when compared to the previous year.

Table 7: Imports of seafood to Portugal by country, 2011

		2010			2011			% Chg 10/11	
	COUNTRY	VALUE €	VALUE £*	VOLUME (tonnes)	VALUE €	VALUE £*	VOLUME (tonnes)	VALUE	VOLUME
1	SPAIN	449,775,049	364,709,094	1,618,543	444,124,287	360,127,061	1,479,933	-1.26	-8.56
2	SWEDEN	170,439,970	138,204,658	353,473	213,096,156	172,793,280	406,515	25.03	15.01
3	NETHERLANDS	76,281,588	61,854,451	233,540	110,518,772	89,616,357	326,342	44.88	39.74
4	CHINA	46,146,714	37,418,986	158,624	49,491,710	40,131,343	160,866	7.25	1.41
5	UNITED STATES	39,257,343	31,832,602	158,928	34,786,674	28,207,470	134,605	-11.39	-15.30
6	GREECE	26,547,489	21,526,562	58,718	28,930,592	23,458,949	60,401	8.98	2.87
7	RUSSIA	21,688,600	17,586,635	72,837	26,718,555	21,665,275	73,367	23.19	0.73
8	DENMARK	31,662,053	25,673,809	75,362	22,564,412	18,296,805	53,684	-28.73	-28.77
9	GERMANY	13,802,046	11,191,665	31,451	19,104,241	15,491,056	38,414	38.42	22.14
10	FRANCE	20,187,294	16,369,271	33,950	17,729,586	14,376,389	28,764	-12.17	-15.28
11	**UNITED KINGDOM****	**23,057,949**	**18,696,999**	**93,983**	**17,614,274**	**14,282,886**	**62,940**	**-23.61**	**-33.03**
12	VIET-NAM (excl. NORTH)	18,665,947	15,135,656	72,243	17,108,256	13,872,572	64,964	-8.35	-10.08
13	ICELAND	11,739,122	9,518,902	34,028	14,730,565	11,944,573	47,612	25.48	39.92
14	NAMIBIA	18,448,965	14,959,712	52,547	14,653,903	11,882,410	37,144	-20.57	-29.31
15	SOUTH AFRICA	12,391,995	10,048,297	45,935	14,488,912	11,748,624	53,512	16.92	16.50

* Exchange rate (2012 average) €:£ = 0.81087 ** 8th position in 2010

1.4 UK SHARE AND EXPORT OPPORTUNITIES

- With the current economic crisis and consumer trend the UK exporters should be able to compete in terms of value and price.
- The key product that continues to present the highest potential in the Portuguese market is cod. However, Portuguese consumers are ranked as first in the world to consume dried and salty cod, which is always challenging for UK suppliers. The supply to industry of not only crab, but also other fish products to produce convenient, ready-to-cook meals has potential for UK companies.
- Crab, lobsters and shrimps are showing considerable share of value of UK exports to the Portuguese market. The UK is currently the largest supplier of crab to the market, followed by France and Spain. However prawns and shrimps imports are facing strong competition from countries external to EU 27.
- Fresh/frozen salmon can also be a good opportunity to UK exporters due to the increasing interest of Portuguese consumers in such product.
- The increase of gourmet segment in not only shops, but also high quality level restaurants may develop into potential business for companies.

Table 8: Opportunity matrix by species

Species	Potential in Retail channel	Potential in Foodservice channel
Salmon	H	H
Pollack	M-L	H
Mackerel	M	H
Trout	L	M
Tuna	L	L

SECTION 2

DOING BUSINESS PROFILE

2.1 THE SUPLLY STRUCTURE

- As far as fresh fish is concerned, exporters to Portugal are recommended to appoint an agent who can deal with local importers/distributors.

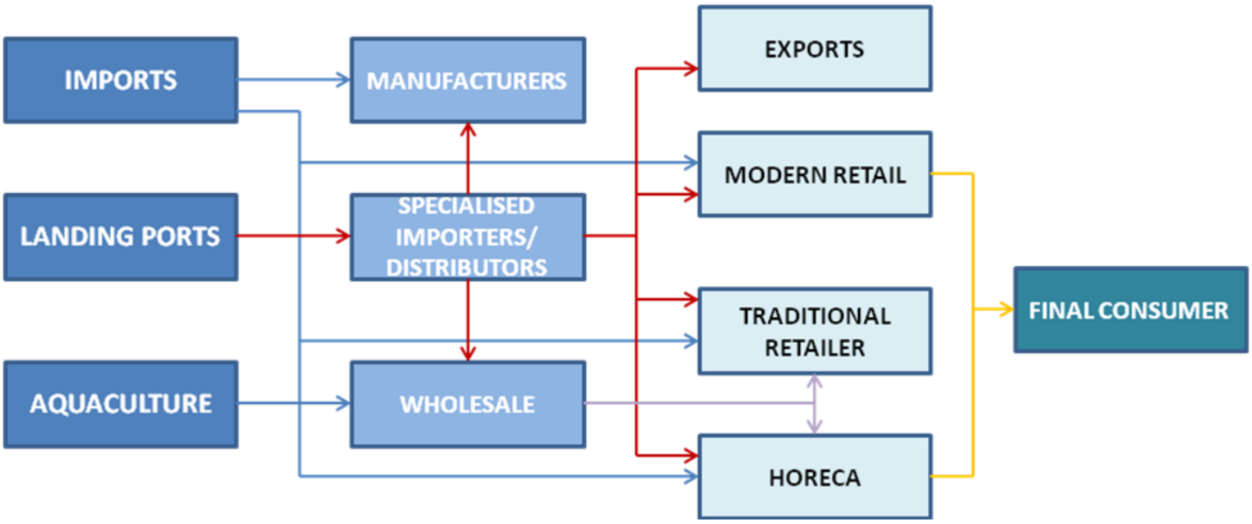
- Due to shelf life constraints, the chilled seafood category does not present sizeable opportunities for import. In the case of prepared fish, only frozen alternatives are likely to make in-roads into the Portuguese market.

- Pre-packed frozen fish manufacturers are advised to select importers/distributors highly specialised in any one channel, such as foodservice, retail, or catering. This will guarantee that the exporter will benefit from the extensive commercial awareness of the appointed distributor and efficient logistics in the marketplace.

- Since the market for private label or bulk businesses is quite competitive, especially in the category of shrimps and prawns, approaching retailers directly is the suggested route to the market. It needs to be noted that some retailers require a local logistic support structure. In fact, it is common to purchase seafood in pallets as opposed to full trucks, this representing a comparative advantage for local suppliers versus importers.

- The market for private label or bulk businesses is quite competitive, taking into account a few international companies and around 250 Portuguese seafood companies registered in Portugal.

The seafood sector in Portugal: Distribution channels



Source: Gestão de Canais de Distribuição - IPAM 2012/2013

2.2 THE RETAIL CHANNEL

- The Portuguese retail grocery market has changed rapidly over the past two decades and remains diversified. Supermarkets, hypermarkets, convenience stores, discounters and specialty shops still compete with traditional independent grocers and open air markets, although the latter formats are struggling to stay competitive with large retail chains.

- In 2010 a new law removed restrictions on the opening of hypermarkets/supermarkets during weekends. Nevertheless this is still regulated by each Municipality. Opening hours for hypermarkets/supermarkets tend to be Sundays to Thursday from 09:00 until 23:00, from Friday until Saturday from 9:00 to 24:00. Other stores are usually open from 9:00 to 19:00, some closing during lunch time from 13:00 to 15:00. They also close from Saturday lunchtime and all day at Sunday.

- Supermarkets are the dominant store formats in Portugal in 2012 (45.6%), mainly due to the previous legislation that allowed such stores to have more flexible opening hours. Hypermarkets account for 23.2% and discount stores 15.6%. Lidl and Minipreço operate the majority of discount stores, Sonae, Jerónimo Martins and Auchan supermarket/hypermarket formats. (Source: AC Nielsen)

- When selecting a retail store consumers tend to value first the price, then diversity of offer and lastly the convenience (access to car parking, location, opening hours)

- Due to the current economic crisis the food retail market in Portugal is suffering from the reduction of the incomes of households, who have changed their buying habits, increasing the frequency of visits to stores and also displaying greater sensitivity to the price factor. The food retail market decreased 1.1% in 2011, but the consumption of own/white label has raised 3.6% when compared to the previous year.

- The wholesale sector in Portugal is also facing a setback in particular with lower prices offered by retail sector, the lack of segmentation of clients and the increase of VAT to 23%. Retail groups such as Jerónimo Martins and Sonae have their own market share in the wholesale sector.

Table TOP Mainstream retail chains in Portugal by turnover 2010
PLEASE SEE TABLE 9

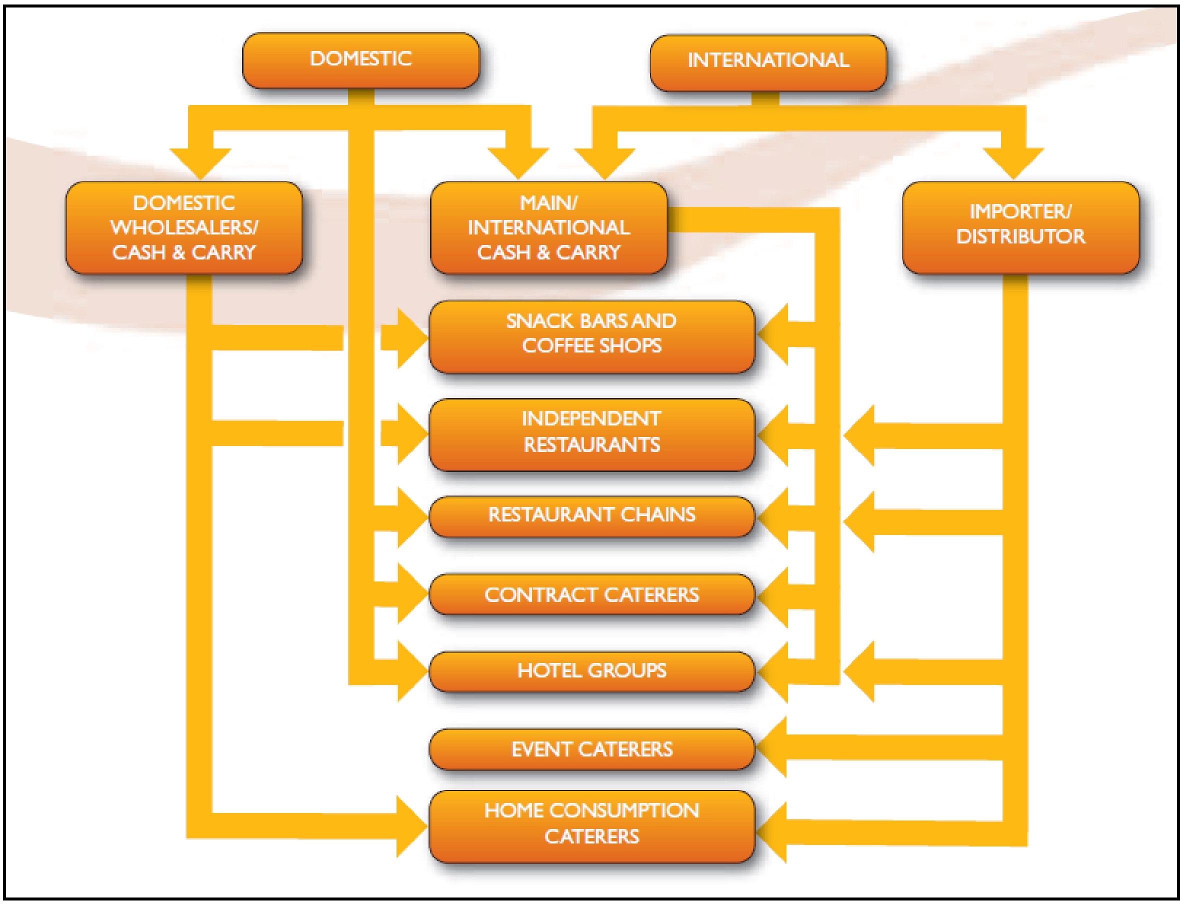
2.3 THE FOODSERVICECHANNEL

In 2010 Portugal had 78,431 food & drink services companies contributing with a total turnover of 7.259 billion € (£5.886 billion). 38.8% of these companies are food service related only, while 61.17% are drink companies. Restaurants generate 55.6% of total revenue against 35.1% of drink companies.

Data from 2009 indicates that food & drink services contributed to 9% of the total number of companies, 7% of employment and only 2% of turnover. Based on the latest trends and within the current economic crisis and increase of food related taxes, these numbers will certainly decrease during 2013.

The annual increase of Portuguese food & drink consumption (not including alcoholic drinks) was 13.3% in 2010/2011. Since 2000 expenditure in food & drink has decreased circa 5%, although the disposable income for "eating out" has increased slightly by 1-2%.

The foodservice supply chain in Portugal



2.4 KEY REGULATIONS AND TARIFFS

Labelling

• EU legislation requires that all food, including seafood, must have a label that includes the name under which the product is sold, the list of ingredients (in descending order of weight), net quantity of pre-packed food ingredients in metric units, date of minimum durability (except for fresh produces), any special storage conditions or conditions of use (except for fresh produces), and the name of the manufacturer, packer or EU seller (except for non-packed fresh produce). Furthermore, EU regulation 2065/2001ec specifically outlines labelling requirements for fishery and aquaculture products. The Regulation is regularly updated to reflect changes to fish names.
• All products offered for retail sale in the EU must be properly labelled with the following information:
- Species commercial name.
- Production method used: 'caught in' for wild fish, 'farmed' or 'cultivated', for aquaculture products.
- Catch area must be listed: for products caught at sea a reference to areas (FAO zones), for products caught in freshwater a reference to the country of origin, for farmed products a reference to the country in which the product undergoes the final development stage.
• In addition to the EU requirements, listed above, producers may voluntarily choose to give additional information, such as production methods or nutritional elements.
• All labelling must be translated into Portuguese.

Table 9: Labelling/packaging regulations in Portugal

Minimum compulsory information	Frozen and deep-frozen		Live, fresh, refrigerated or cooked	
	Non-retail packs	Unpacked goods for retail	Non-retail packs	Retail packs
a) Commercial name of the species	X	X	X	X
b) Scientific name of the species	X		X	
c) Production method	X (caught at sea, caught in freshwater or farmed)	X (caught at sea, caught in freshwater or farmed)	X (caught at sea, caught in freshwater or farmed)	X (caught at sea, caught in freshwater or farmed)
d) Fishing or farming zone	X	X	X	X
e) Presentation		X (whole, fillets, other)	X (gutted, with or without head, fileted, cooked, thawed, other)	X (gutted, with or without head, fileted, cooked, thawed, other)
f) Name		X (frozen product)		
g) Net weight	X (for packed products)		X (for packed products)	
h) Identification of first consigner or shipping agent				

2.4 KEY REGULATIONS AND TARIFFS

Organic farming

- New EU rules on organic food labelling including the requirement to display the new EU organic logo, enter into force on 1 July 2010 (EC834/2007). The so-called "Euro-Leaf" will now be obligatory on pre-packaged organic food products that have been produced in any of EU Member States and meet the necessary standards. Other private, regional or national logos will continue to appear alongside the EU label. The logo stays optional for non-packed and imported organic products. In addition to the logo, the new labelling rules also include the compulsory indications of place of farming of the products' ingredients and code number of the body that had been in charge of the controls. Operators have a two-year transition period to comply with these new labelling rules. The new rules also cover organic aquaculture production of fish, shellfish and seaweed.

Tax on food

- Since the UK and Portugal are both members of the EU, no duty is charged on food entering the Portuguese market from the UK.
  VAT is applied as follows:
  - The standard VAT rate in Portugal is 23% for mainland (16% for Azores and 22% for Madeira).
  - From 2013 onwards a reduced rate is no longer applicable to food products (previous rate 6%).

2.5 TIPS AND USEFUL LINKS

- Fisheries sector is covered by the Ministry of Agriculture, Sea, Environment and Regional Planning (MAMAOT) and the Secretary of State for the Sea together with the Directorate-General of Natural Resources, Security and Maritime Services (DGRM).
  DGRM covers the application, inspection and supervision of fisheries and aquaculture regulations.

Useful links:

- Ministry of Agriculture, Sea, Environment and Regional Planning (MAMAOT) – General-Secretariat
  www.sg.mamaot.pt

- Directorate-General of Natural Resources, Security and Maritime Services (DGRM)
  www.dgrm.min-agricultura.pt

- General-Directorate for Sea Policy (DGPM)
  www.dgpm.gov.pt/

- Funding Institute for Agriculture and Fisheries (IFAP)
  www.ifap.min-agricultura.pt/

- Research Institute for Fisheries and Sea (IPIMAR)
  www.inrb.pt/ipimar

- Institute for Ports and Maritime Transports (IPTM)
  www.imarpor.pt

- Authority for Food Safety & Economic (ASAE)
  www.asae.pt

- Docapesca – Ports & Auctions
  www.docapesca.pt

- Fileira do Pescado
  www.fileiradopescado.com

- European Legislation/Labelling
  http://europa.eu/legislation_summaries/index_en.htm

- Organic Farming
  http://ec.europa.eu/agriculture/organic/home_en

- Aquaculture
  http://ec.europa.eu/fisheries/news_and_events/press_releases/300610/index_en.htm#3

Ports:

- IPTM – Institut for Ports and Maritime Transports
www.imarpor.pt

- Leixões (Porto)
www.apdl.pt

- Lisbon
www.portodelisboa.com

- Sines
www.portodesines.pt

ASSOCIATIONS

FIPA - FEDERAÇÃO DAS INDÚSTRIAS PORTUGUESAS AGRO-ALIMENTARES
(Portuguese Federation of Food Industries)
www.fipa.pt

ANCIPA – ASSOCIAÇÃO NACIONAL DE COMERCIANTES E INDUSTRIAIS DE PRODUTOS ALIMENTARES
(Portuguese Association of Food Industries and Traders)
www.ancipa.pt

ADIPA – ASSOCIAÇÃO DOS DISTRIBUIDORES DE PRODUTOS ALIMENTARES
(Association of Food Distributors)
www.adipa.pt

ACOPE - ASSOCIAÇÃO COMERCIANTES DE PESCADO
(Association of Fishery Traders)
www.acope.pt

ASSOCIAÇÃO PORTUGUESA DE EMPRESAS DE DISTRIBUIÇÃO

(Association of Distribution Companies)
www.aped.pt

ASSOCIAÇÃO DA HOTELARIA, RESTAURAÇÃO E SIMILARES EM PORTUGAL
(Association for Hotels, Restaurants and Similar businesses)
www.ahresp.com

REFERENCES

AICEP – Portugal – Country Profile 2012
www.portugalglobal.pt

APDL - Porto de Douro e Leixões
www.apdl.pt

Auchan Portugal
www.auchan.pt

Datacentre - IGD Retail Analysis
www.retailanalysis.igd.com

Eurostat
www.ec.europa.eu/eurostat

FAOSTAT
http://faostat.fao.org/

GEE - Gabinete de Estratégia e Estudos
www.gee.min-economia.pt

Gestão de Canais de Distribuição - IPAM 2012/2013
https://sites.google.com/site/mk5gcd2012/home

IMF World Economic Outlook
www.imf.org/external/pubs/ft/weo/2013/update/01/index.htm

IPTM- Instituto Portuário e dos Transportes Marítimos
www.imarpor.pt

INE - National Institute of Statistic
www.ine.pt

Jerónimo Martins
www.jeronimomartins.pt

Kantar Worldpanel
www.kantarworldpanel.com

Lidl Portugal
www.lidl.pt

New Economics Foundation - Ocean 2012 Transforming European
www.ocean2012.eu

Norge - Mar da Noruega
www.mardanoruega.com

Minipreço
www.minipreco.pt

Porto de Lisboa
www.portodelisboa.com

Porto de Sines
www.portodesines.pt

Sonae
www.sonae.pt

ANNEX I

Imports of Seafood from UK to Portugal, 2011

Table 10: Imports of Seafood from UK to Portugal, 2011

PRODUCT/INDICATORS	VALUE €	VALUE £	VOLUME (100KG)
CRABS EVEN IN SHELL, LIVE, FRESH, CHILLED, DRIED, SALTED OR IN BRINE	4,432,663	3,594,313	15733
FROZEN COD	3,172,954	2,572,853	24811812
FROZEN MACKEREL	2,909,695	2,359,384	15505
FROZEN CRABS	1,710,638	1,387,105	4303
COD SALTED OR IN BRINE ONLY (EXCL. FILLETS AND OFFAL)	1,674,933	1,358,153	6451
LIVE LOBSTERS	860,142	697,463	456
FROZEN REDFISH	549,207	445,335	1472
FROZEN MEAT "WHETHER OR NOT MINCED" OF COD "	545,350	442,208	2053
FILLETS OF COD	531,699	431,139	1923
FROZEN SHRIMPS AND PRAWNS	419,709	340,329	774
FISH, DRIED, EVEN SALTED, NOT SMOKED	251,193	203,685	730
COQUILLES ST JACQUES FROZEN, EVEN IN SHELL (EXCL. SMOKED)	211,288	171,327	203
FRESH OR CHILLED BLUEFIN TUNAS	188,895	153,169	267
FROZEN MOLLUSCS	100,839	81,767	192
LIVE, FRESH OR CHILLED, SCALLOPS	96,480	78,233	143
FRESH OR CHILLED FILLETS OF SWORDFISH	95,346	77,313	200
SMOKED PACIFIC SALMON	89,711	72,744	64
FRESHWATER CRAYFISH	71,416	57,909	31
CRUSTACEANS	54,608	44,280	120
FROZEN SARDINES	54,144	43,904	681
ROCK LOBSTER AND OTHER SEA CRAWFISH	46,164	37,433	22
FROZEN FILLETS	42,055	34,101	127
MOLLUSCS	41,361	33,538	61
FROZEN FILLETS OF COD	38,370	31,113	81
FROZEN BRISLING OR SPRATS	35,358	28,671	180
FROZEN FILLETS OF TUNA	24,578	19,930	56
OCTOPUS	23,876	19,360	38
FROZEN FRESHWATER CRAYFISH	18,256	14,803	28
STRIPED VENUS AND OTHER "VENERIDAE"	17,063	13,836	21
FROZEN CRAWFISH TAILS	15,312	12,416	15
FROZEN SQUID	14,333	11,622	30
FROZEN FILLETS OF SALTWATER FISH	13,943	11,306	38
FROZEN ATLANTIC SALMON	12,421	10,072	7

NORWAY LOBSTERS	11,838	9,599	4
FROZEN CRUSTACEANS	11,746	9,524	39
LIVE, FRESH OR CHILLED MOLLUSCS	11,571	9,383	35
FROZEN SALTWATER FISH, EDIBLE	8,770	7,111	36
ILLEX SPP	8,489	6,883	14
FRESH OR CHILLED MEGRIM	7,640	6,195	11
FRESH OR CHILLED FLAT FISH	7,605	6,167	17
PACIFIC SALMON	7,488	6,072	6
FROZEN FILLETS OF COD	6,752	5,475	23
FRESH OR CHILLED HADDOCK	6,736	5,462	71
FROZEN NORWAY LOBSTERS	6,363	5,160	7
FROZEN FILLETS OF HAKE	6,196	5,024	8
FROZEN PLAICE	5,966	4,838	21
FROZEN FILLETS OF PANGASIUS	5,892	4,778	21
SHRIMPS AND PRAWNS	5,886	4,773	2
FROZEN CUTTLE FISH	4,904	3,977	10
FROZEN FILLETS OF SWORDFISH	4,608	3,736	8
FRESH OR CHILLED MONKFISH	4,149	3,364	3
FROZEN FILLETS OF HADDOCK	3,237	2,625	4
FRESH OR CHILLED ALASKA POLLACK	2,364	1,917	22
FISH, ONLY SALTED OR IN BRINE	2,337	1,895	25
FILLETS OF FISH, DRIED, SALTED OR IN BRINE, BUT NOT SMOKED	2,147	1,741	5
FROZEN MEAT OF SALTWATER FISH N.E.S.	2,065	1,674	9
SQUID	2,061	1,671	3
OYSTERS	1,800	1,460	N/A
FRESH OR CHILLED COD	410	332	N/A
SMOKED FISH, INCL. FILLETS	298	242	N/A
FILLETS OF SALTWATER FISH, FRESH OR CHILLED	179	145	N/A
FROZEN EDIBLE FISH LIVERS AND ROES	152	123	N/A
FRESH OR CHILLED FILLETS OF COD	81	66	N/A

Source:EUROSTAT

* Exchange rate (2012 average) €:£ = 0,81087

5. CONTRIBUTORS

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