ITALY

Overseas Market Introduction Service

The sea food sector in Italy
ITA 1256

for

Sea Fish Industry Authority

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EXECUTIVE SUMMARY

The majority of information to compile this report has been taken from national statistics institutes (ISMEA, IREPA, ISTAT: full details at Chapter 10). The latest data available have been published by the above institutes in January 2013: they refer to the whole of 2011 and, in some cases, also report 2012 data referring to the period January-October.

In this report we have outlined, whenever possible, the most recent available data; in any case the year of reference has been clearly stated.

1. MATCHING PROFILE

With 60 million inhabitants (June 2012), Italy is the 4th country of the European Union for population (after Germany, France and the UK); its demographic density amounts to 202 inhabitants per square km., which is higher than the Union average.

In 2013 Italy remains a member of the G8. According to the World Bank, Italy represents the 8th economic power of the world for total GDP, ahead of India and behind Brazil.

Also, in per–head terms, Italy represents one of the richest economies, at the 23rd position world-wide; 12th in the European Union.
The Italian economy has an important role also in the international commerce, resulting to be the 8th country for imports and exports of goods.

UK and Italy Trade

Italy and the UK are already strong European Union partners. They have long-standing, close political, defence and trade relationships. General Trade in goods was worth £23.99 billion in 2011. Italy was listed as the seventh largest UK trade partner for imports and seventh largest UK export market in 2011. From 2010 to 2011 the UK's export value to Italy grew by 12%.

A Complex, Discerning Consumer Market

The purchasing power of Italian families has reduced recently but household savings remain high. Sixty-eight per cent of Italians own a house and 41% of Italian families' debts are house mortgages. In 2010, 10% of households owned almost 45.9 % of the total wealth. Wealth distribution is geographically uneven. Per capita incomes of Italy's northern regions are among the richest in Europe, whereas several areas in the South, where unemployment is higher, are far behind. Quality of product and service is very important.

Fast facts	Source: Istat		
Population	60,870,745 (2012)	**Total GDP**	Almost $2.1 trillion (2010)
Land area	301,340 sq km	**Real GDP growth rate**	0.4% (2012)
Inhabitants per sq km	202	**GDP per capita**	$30,464 (2011)
No. of households	22,900,000 (2007)	**Inflation**	2.2% (Jan.2012)
Capital	Rome	**Unemployment**	8.4% (2011)
Other main cities	Milan, Turin, Naples	**International status**	Member of EU
Language	Italian	**Government type**	Republic
Currency	Euro	**Total F&D imports**	€35,300.79 million
Exchange rate (on 14.03.13)	€1 = £ 0.8709 £1 = € 1.1479	**Total F&D exports**	€29,476.44 million

2. THE TRADE ENVIRONMENT

Seafood Sector Trends

Italian domestic **consumption** of fish went down from January to October 2012 by 1.2%, compared to the same period in 2011. In particular this referred to the consumption of fresh fish, while frozen and processed products maintained a slightly positive trend.

As far as national fishery **production** is concerned, a considerable decrease has been recorded, despite a higher number of days at sea: total landings were 365,835 tonnes for a value of € 1,434 million. The Italian fishing **fleet** has been steadily declining in numbers, gross tonnage and kW since 2004. In 2011 it comprised 13,064 vessels.

A decrease was recorded also in the **processing industries**, which reached a -9%, while the whole food and drink industry recorded only a -1%.

As regards **international commerce**, according to the latest National Institute for Statistics (ISTAT) data from January to August 2012, the Italian fishery trade balance highlights a reduction of deficit for fresh and processed products (in 2011 the deficit of the Italian fishery trade balance was 3.86 with a significant increase on 2010.
In fact, a contraction of the exported volumes was recorded, from 135 to 126 tonnes; while there was a slight increase in imports, from 940 to 961 tonnes.

National Catch in the Mediterranean area

The national catch in January-September 2012 registered a slight decrease of approximately 8% compared to the same period in 2011, which in turn had already decreased by 5.7% compared to 2010. Total catch in 2011 amounted to 210,324 tonnes for a total income of € 1,434 million.

The slight catch decline of the national fleet in the Mediterranean area occurred although – thanks to good weather - there was an increase of the total fishing days during the year, i.e. 132.7 days against 125.7 of the previous year.

From 2011 there has been a constant reduction in the number of vessels; precisely, at the end of 2011 the national fishery fleet operating in the Mediterranean sea was composed by 13,064 vessels, 1.2% less compared to 2010 for a gross tonnage of slightly less than 169 thousand tonnes.

Particularly, it is worth mentioning the reduction of anchovy, a product which on its own covers 1/5 of the total of the national catch. Also, it is worth to note the decrease in pilchard, hake and swordfish.

Among the main species of the other groupings, catch contraction in comparison to 2010 affected common cuttlefish, squids and musky octopus as far as the Marine molluscs are concerned; whereas striped venus remains stable. There is a general decrease in catch of the most peculiar crustaceans of the Italian seas.

Catch in the Mediterranean area	2011 tons	Variation % on 2010
Fishes, of which	**139,412**	**-6.8**
European pilchard	14,377	-11.7
European hake	10,462	-9.2
Swordfish	5,357	-11.2
Striped mullet	4,793	-2.9
Horse mackerel	4,373	3.6
Mullets	3,568	34.5
Anchovies	46,237	-14.5
Marine molluscs, of which	47,821	-1.5
Striped venus	19,668	-0.4
Changeable nassa	4,475	30.0
Octopuses	4,023	25.4
Squids	3,114	-11.9
Crustacean, of which	23,091	-7.4
Rose Shrimps	10,029	-2.3
Mantis squillids	5,427	-12.7
Prawns	2,698	-16.2
Giant red shrimp	2,350	-6.7
Total	**210,324**	**-5.7**

Production and Aquaculture

Moving on to aquaculture, it is to be noted the fall in molluscs' culture: a decline of about 18% in the production of mussels and clams was recorded.

For the other species, there is a strong contraction in the production of sea bass and a growing trend of gilthead bream, a trend which is opposed to that one recorded in the last years.
In 2011 also the production of trout increased by 2.5% confirming this to be the leading product in aquaculture with 41,000 tonnes product (growth continued through an increase in purchasing, both quantity and value, in the period January-October 2012 – see table on page 9).

Finally, a good growing rate of 20% is also noted for sturgeons.

Industry

According to the latest ISTAT data on the industrial production index, industry operating in the field of processed fish, crustaceans and molluscs between January–October 2012 showed a strong reduction (8.9%) compared to the same period in 2011. During 2011 the industrial production had largely increased due to the growth of the domestic consumption of tuna (+3.2% compared to 2010).

In this period of economic uncertainty in Italy, in fact, households are seeking cheaper solutions that still offer a valid alternative to other sources of animal proteins.

Official sources of data for 2011 indicate an increase of 4.6% of the Italian production of canned tuna compared to the previous year. It amounts to 68 thousand tonnes for a value of €1.07 billion Euros.

It is interesting to note that one third of the fish processing market is in the hands of three large companies: Fjord SpA (www.fiord.eu), Sal Seafood Srl (www.salseafood.it) and Riunione Industrie Alimentari (www.lariunione.it).

The fish market network in Italy
(with websites where available)

Production Fish Markets

Corigliano Calabro - 12,000 sqm (external area) + 3,000 sqm (covered)

Goro – 7,700 sqm

Livorno – 5,500 sqm

Viareggio – 4,000 sqm (covered)
www.itticoviareggio.it

Civitanova Marche - 2,500 sqm
www.mercatoitticocivitanovese.it

San Benedetto del Tronto – 1,000 sqm
www.mercatoitticosbt.it

Cesenatico – 1,000 sqm

Trapani – 500 sqm
www.mercatoitticosbt.it

Civitavecchia - 400 sqm

Manfredonia – 350sqm

Distribution Markets

Turin - 24,835 sqm

Milan - 14,000 sqm
www.mercatimilano.it/i-mercati/mercato-ittico

Rome - 10,000 sqm (covered)
www.agroalimroma.it

Venice – 6,900 sqm

Mixed Markets

Chioggia – 11,698 sqm
www.ittico.chioggia.org

Catania - 10,000 sqm

Porticello - 5,000 sqm

Trieste - 1,258 sqm

Molfetta - 1,200 sqm

Map of the Italian fishery markets

3. CONSUMER TRENDS

During an economic crisis, Italian families cut back on all spending including food and drink consumption and **fresh fish products** are often the target for these savings. In fact the domestic purchase of fish went down from January to October 2012 by 1.2%, compared to the same period in 2011.

In particular, the reduced consumption of fresh products is confirmed. Going into detail, for the fresh fish sub-sector, it is to be noted a substantial decrease in consumption of anchovies, common squids, striped venuses and octopi. On the contrary, it is also worth highlighting the significant increase of the purchase of fresh salmon and trout as shown in table on page 12).

The trend for **processed products** (such as preserves and among these, especially tuna) and frozen products (such as fish fillets and mixed products) is still positive. The period January – October 2012 shows an increase in tuna demand, the same applies to frozen products, in particular the natural ones.

The greater demand for these products may have influenced their price increase; in addition to this, other aspects need to be considered, such as the higher cost of energy and for some of the products such as tuna, the cost increase of raw materials.

It is worth highlighting that a lot of promotional activity is carried out in the points of sale of modern distribution, especially on preserves.
Other important aspects which push in the direction of purchasing these products are the "private label" competition and the use of "lowest prices".

Prices

Considering prices of the main catch in the most important fishery markets, a general decrease in prices at production prevails (mainly for striped mullet, sole and common squid), whilst there is a general increase in prices at consumption.

In some areas there were exceptions, e.g. an increase was seen in average production prices of trout, sea bass and gilthead breams of small sizes. However, for anchovies and squilla mantis there was a considerable increase of their rates, which could be blamed upon the significant decrease in quantities put up for auction.

2011 closed with an increase of prices at consumption of fresh species, usually in the points of sale of retail chains and traditional shops, despite reduced demand. The only exceptions are anchovies and, to a smaller degree, mussels.

As said above, the average prices of catch show either a decreasing or stable trend. The exceptions are prices of Norway lobster, striped mullets and octopus; the former two recorded a price increase with a reduction in quantities (landed and sold), whilst the latter showed an increase despite a greater availability of product (compared to January-October 2011).

Dynamics of the Domestic Purchasing Jan/Oct 2012 in comparison to Jan/Oct 2011		
	Quantity	Value
Fish Products	**-1.2**	**-1.5**
Fresh, of which:	**-3.1**	**-3.2**
Anchovies	-10.1	-8.1
Common Squids	-8.7	-8.5
Mussels	-3.4	-6.5
Hakes and Codfish	-3.9	-3.1
Gilthead breams	1.8	-0.8
Swordfish	0.6	-2.8
Octopus	-6.8	-7.2
Salmon	13.6	9.9
Cuttlefish	-5.3	-5.9
Sea bass	2.4	2.0
Trout	6.8	6.3
Clams	-8.3	-6.5
Preserves, of which:	**2.4**	**2.7**
Tuna	2.2	2.3
Frozen, of which**:**	**1.7**	**-0.2**
Natural	2.2	1.1
Prepared	1.0	-2.1

Average Prices at Consumption (fresh produce)	Jan/Oct 2011 Euro/Kg	Jan/Oct 2012 Euro/Kg	Variation %
Anchovies	5.56	5.68	2.2
Common squids	10.99	11.01	0.2
Mussels	2.75	2.66	-3.2
Gilthead breams	9.46	9.21	-2.5
Octopus	10.10	10.06	-0.4
Salmon	11.00	10.64	-3.2
Common cuttlefish	9.90	9.84	-0.6
Sea bass	10.98	10.93	-0.4
Trouts	7.65	7.62	-0.4

Average Prices at Production (fresh produce)	Jan/Oct 2011 Euro/Kg	Jan/Oct 2012 Euro/Kg	Variation %
Anchovies	1.44	1.44	0.2
Hakes and Codfish	8.46	7.72	-8.7
Sole	14.91	11.01	-26.1
Striped mullet	3.78	4.09	8.3
Common squid	12.31	12.07	-1.9
Octopus	7.83	8.53	8.9
Common cuttlefish	8.48	8.49	0.1
Mantis squillids	6.79	6.44	-5.2
Norwegian lobster	23.86	23.25	-2.6

4. ITALIAN/INTERNATIONAL COMMERCE

Interchange among EU Countries

In 2011 **exports** in general declined in volumes, particularly towards Spain and France.
In the Spanish market decreased in particular: the Italian anchovy (mainly due to the shortage of Italian product), fresh sardines, clams and other frozen veneridae. On the contrary there was a growing trend in the export of live, fresh and frozen mussels.
In France, the purchase of mussels decreased, whereas a good increment was recorded for the imports of sardines, both fresh and frozen.

To be highlighted is the very good performance (again) of trout, with an increase in exports by 21.5%. This not only towards Austria and Germany, which are traditional markets, but above all towards Poland and Rumania. Also to be noted the strong decrease in sea bream exports, caused by the fall of Tunisian demand, after 3 consecutive years of strong growth (2007-2009).

A negative trend was confirmed for sea bass in important markets - such as France, UK and Spain - which both in 2010 and 2011 reduced their demand for this Italian product.

Compared to 2010, Italian **imports** (in 2011) from Spain increased, especially canned tuna, fresh and frozen sardines, common squids and frozen small squids, prawns and frozen shrimps.

In 2011, imports from mainly France and Denmark decreased. From France the purchasing decline involved frozen tuna for industrial use oysters (live, fresh and frozen). From Denmark, supplies for frozen Norway lobster, dry cod fillets both salted and brine, preparations and shrimps-based preserves, decreased.

It is important to note the strong growing trend of salmon purchases from abroad, a trend which appears to have been positive for several years due to an Italian booming demand. The major supplier to Italy is Sweden: in the last two years, imports from this country have more than doubled.

Salmon imports from the UK have increased by 36% - from 247 tonnes (for a value of £1,414,916) in 2011 to 336 tonnes (for a value of £1,638,700) in 2012. Considering all the fresh fish exported from the UK to Italy, salmon now represents 28.66% in volume and 18.6% in value.
Further information on imports from the UK are contained in the detailed tables attached to this report.

Exchange with non-EU Countries

From the analysis of Italian trade with non-EU countries, no country covers a predominant position.

As regards **exports**, it is to be noted a reduction of shipments towards Tunisia (particularly of mackerel, anchovy, fresh and frozen gilthead bream) and Albania (for anchovy fillets), whereas a hike in the purchasing of red tuna from Japan was reported. A positive trend of anchovy exports (salted, preserved and brine) and canned tuna towards the United States is also recorded.

As regards **imports**, there is a growing trend of frozen pangasius fillets coming from Vietnam (among the products coming from this country, quantities of pangasius are large). Moreover, in 2011 a net increment of imports from China of frozen cod and tuna fillets addressed to the industrial production is to be noted. Also from Ecuador the intake on the national market of tuna loins clearly increased.

Import (EU Countries)	2011 tonn	Var % 11/10 Q.ty	Var % 11/10 Value
Total EU	**105,105**	**-7.1**	**4.7**
Spain	47,069	-15.3	-0.1
Germany	11,532	2.6	14.0
France	11,128	-12.0	-1.0
Greece	9,361	-1.4	-0.8
Austria	5,839	6.2	5.9
Other EU countries	20,175	8.2	12.4

Export (EU Countries)	2011 tonn	Var % 11/10 Q.ty	Var % 11/10 Value
Total EU	**497,747**	**1.0**	**7.8**
Spain	203,900	3.6	14.2
Netherland	57,540	-0.9	3.6
Greece	49,333	-0.	9.5
France	46,692	-4.9	6.9
Denmark	39,931	-7.1	-3.6
Other EU countries	100,351	4.0	6.7

(Source: ISMEA on ISTAT data)

5. UK SHARE OF SEAFOOD EXPORTS TO ITALY

A series of tables reporting data on the exports from the UK to Italy by volume of several fish species have been gathered and are attached to this report as: Annex A, Source: HM Customs Revenue.

6. THE SUPPLY STRUCTURE

Logistics in the seafood sector in Italy is very efficient and delivering seafood to key cities and ports in the northern part of the country does not pose any challenge. However, it may be difficult to address the main chains' requirements of supplying a number of depots or each single store. Moreover, sometimes the retailer may request the producer to work in partnership with an Italian processor who can take on the responsibility of packaging.

Entering the Italian market directly would of course be more rewarding, however it could only be viable if the supplier committed themselves to invest management time and financial resources to handle the business.

Distributors purchase from importers and then re-sell on to the retail trade and the HORECA (hotel, restaurant, catering) channel.

The traditional role of the regional wholesaler is declining. In the past, there was a highly fragmented business dominated by regional wholesalers. These have mainly been replaced by larger groups demanding consistent quality levels, low prices and who in turn guarantee high volumes. They deal almost exclusively with frozen products.

Some of the Italian key players, leaders in their specific sub-sector:

Production and distribution of fresh fish

Fiorital SpA
Leading operator specialised in fresh fish both for the food service and the retail chains (with special brand "Del Mare"). Recently constituted a separate division dealing with frozen products. Have been on the market for 40 years.
www.fiorital.it

Production and distribution of frozen fish

Panapesca SpA
Major operator with own fleet, production sites all over the world and owning a retail chain of 40 p.o.s in Italy under the fascia "Crio".
www.panapesca.eu

Distribution to the Food service

Marr SpA
Leader in the distribution of about 10,000 F&D products to the commercial and social catering, covers the whole national territory with a sales force of 650 staff. Have been on the market for 40 years.
www.marr.it

7. THE RETAIL CHANNEL

The growing role of Super/hypermarkets

Traditional fishmongers still account for more than half of the trade but the situation is rapidly changing. Their importance is declining, while sales of fresh fish in the multiples is constantly increasing, also thanks to affordable prices enabled by lower margins.

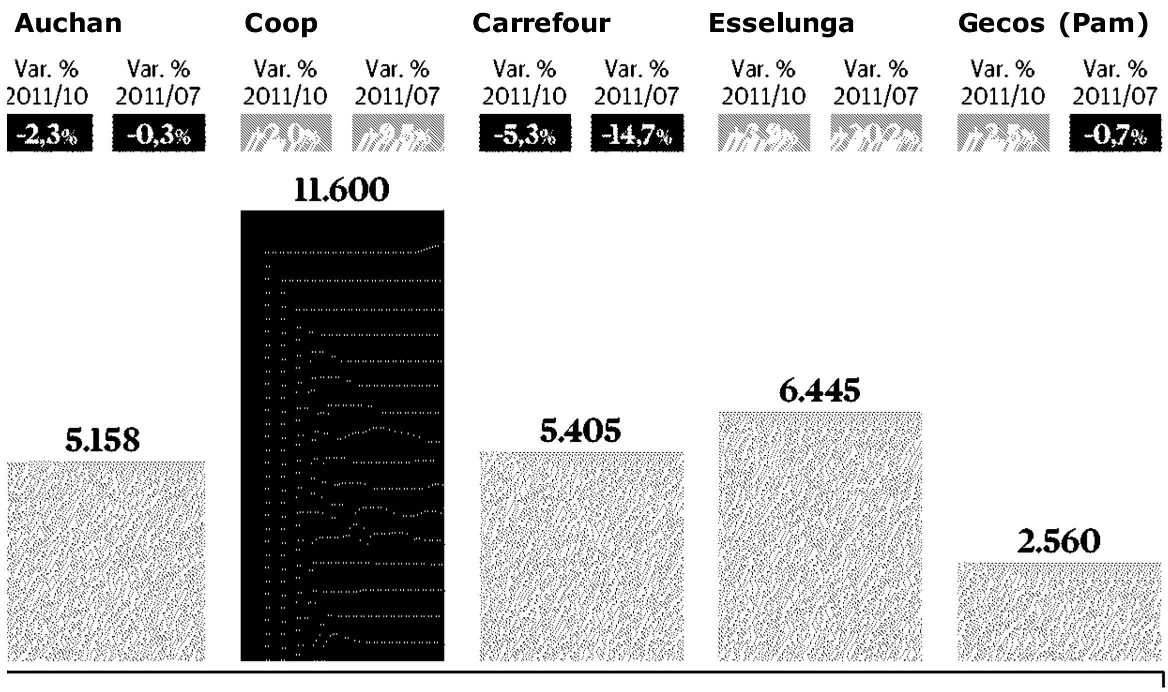
The multiples are more innovative and willing to source from abroad. Their main requirement is standard quality all year around. Their logistics structures are rapidly improving to enable them to import fresh directly to shorten the supply line and cut costs.

TOP 5 RETAIL CHAINS:

Overall turnover

Values expressed in Million of Euro.

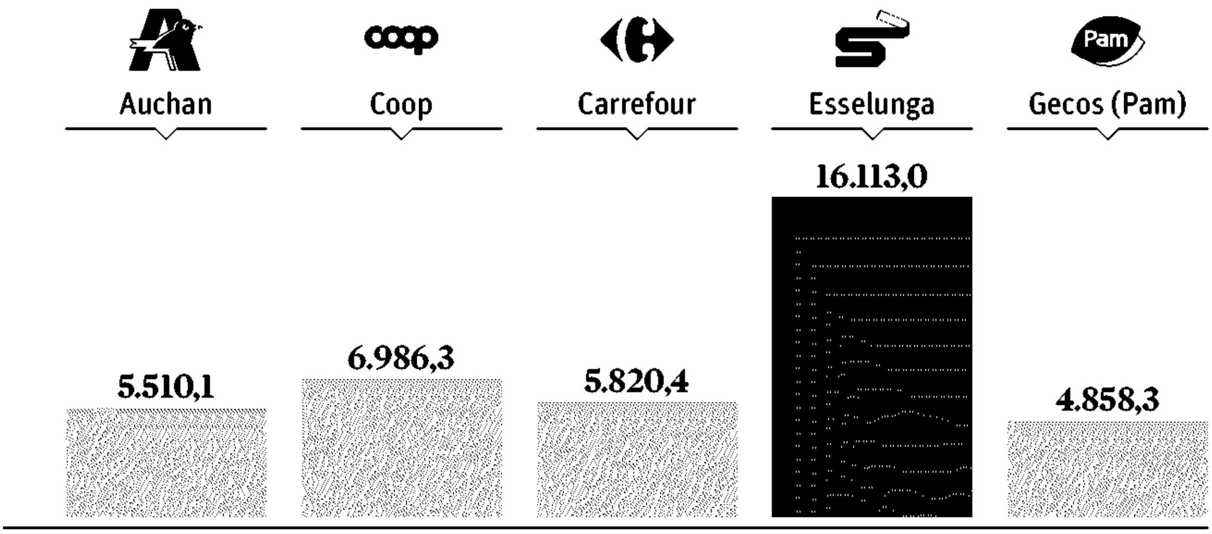
Total: € 31,168 Million of Euro.



[Source: article on "Il Sole 24 Ore", Feb. 2013. Il Sole 24 Ore is the Italian equivalent to The Financial Times]

Turnover per square meter

Amounts are expressed in Euro.



Selling Areas and Market Share

5 top Retail Chains	Total Selling Area	Average Selling Area	Market Share 2011
Company	**Sqm**	**Sqm**	**Based on total turnover%**
Auchan	1,169,406	1,574	7.8
Coop	1,586,333	1,815	15.3
Carrefour	802,086	1,617	6.6
Esselunga	402,154	2,852	7.8
Pam Group	446,759	1,310	3.6

8. THE FOOD SERVICE CHANNEL

The Italian food service market, totalling 5 billion Euro in 2011, is very fragmented and characterised by a huge number of family-run outlets that guarantee their customers friendly service and high food quality. This is one of the reasons why international food chains find it hard to compete and establish themselves in Italy.

This scenario is confirmed by a density of operations per 100,000 inhabitants which is particularly high in Italy: 409 companies against 297 of the European average, 185 in the UK, 208 in Germany and 287 in France.
Also, the average number of staff per company is particularly low: 3.9 in Italy against 12.8 in the UK and 8.1 in Germany.

Key players in social catering	Turnover Euro (.000)	Turnover Euro (.000)	Turnover Euro (.000)
Company	**2011**	**2010**	**Variation %**
Elior	652,300	338,000	93.0
Sodexo	421,500	412,000	2.3
Camst	392,000	368,000	6.5
Cir Food	379,299	280,000	35.5
Compass	253,300	244,000	3.8
Serenissima	206,900	186,800	10.8
Pellegrini	188,000	181,000	3.9
Dussmann	114,000	172,000	8.9
Serist	106,000	98,000	8.2
Vivenda	102,000	95,000	7.4
TOTAL	**2,815,299**	**2,305,000**	**22.1**

Key players in commercial catering	Turnover Euro (.000)	Turnover Euro (.000)
Company	**2011**	**2010**
Autogrill	1,307,200	1,352,697
McDonald's	972,000	904,000
Chef Express	278,132	281,587
Airest	141,634	149,735
MyChef	120,815	114,025
Burger King	120,815	114,025
FiniFast	69,254	69,254
Servair Air Chef	61,942	83,388
Vera	58,335	57,850
Eataly	49,898	49,898
Cigierre	46,457	38,852
Roadhouse Grill	43,930	36,321
Maglione	38,720	38,720
Cibis	37,471	37,689
TOTAL		

9. KEY REGULATIONS AND TARIFFS

Labelling/packaging regulations in Italy

EU regulations apply to food labelling in Italy. There are no regulations which are specific to the Italian market. 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 unit, date of minimum durability (except for fresh produce), allergen information, any special storage conditions or conditions of use (except for fresh produce) and the name of the manufacturer, packer or EU seller (except for loose fresh produce).

EU Regulation 2065/2001 specifies labelling requirements for most fishery and aquaculture products.
All labelling must be translated into Italian.

All products offered for retail sale in the EU must be properly labelled with the following information:

1. Species commercial name.
2. Production method used: 'caught in...` for wild fish, 'farmed' or 'cultivated', for aquaculture products.
3. Catch area must be listed: - for products caught at sea, a reference to areas (FAO zones); - for products caught in freshwater, reference to the country of origin; and - for farmed products, 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.

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 Italy are members of the EU, no duty is charged on food entering the Italian market from the UK.
In Italy a VAT rate of 10% applies to fresh and frozen fish.
Certain types of fish (such as crawfish, lobsters and oysters) are now considered "luxury products" and therefore a 21% VAT rate applies.

10. REFERENCES AND USEFUL LINKS

Institutes

ISMEA
National Institute of Services for the Agrifood Market
www.ismea.it

IREPA
Institute for Economic Research in Fisheries and Aquaculture
www.irepa.org

ISTAT
National Institute for Statistics
www.istat.it

MINISTERO POLITICHE AGRICOLE, ALIMENTARI E FORESTALI (MPAAF)
Italian Ministery for Agrifood and Forestry Policies
www.politicheagricole.it

UNIMAR
Consortia gathering the research centres on fishery and aquaculture of the following cooperatives: Federcoopesca, Lega Pesca, A.G.C.I. Agrital,

Associations

AMA
Association of Mediterranean Aquaculturists
www.a-m-a.it

FEDERALBERGHI
Federazione delle associazioni italiane alberghi e turismo
(Federation of the Italian Associations of Hotels and Tourism)
www.federalberghi.it

FEDERALIMENTARE
Federation of the Italian food industry
www.federalimentare.it

AITA
Italian association of food technology
www.aita-nazionale.it

ISTITUTO ITALIANO ALIMENTI SURGELATI
www.istitutosurgelati.org

Trade Publications

IL PESCE
www.ilpesce-online.com

SURGELATI
www.surgelatimagazine.com

RETAIL AND FOOD
www.retailfood.it

GDO-WEEK
www.gdoweek.it

EUROFISH ONLINE MAGAZINE
Special section on Italy
February 1/2013
www.eurofishmagazine.com

Trade Fairs

RHEX RIMINI HORECA EXPO MSE
www.riminifiera.it

SLOW FISH
Genoa
www.fiera.ge.it

TUTTOFOOD
www.tuttofood.it

SAPORE
www.saporerimini.it

11. UKTI CONTACT IN ITALY

Valeria Notari
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www.ukinitaly.fco.gov.uk
www.ukti.gov.uk

12. ANNEX A (UK SHARE OF SEAFOOD EXPORTS TO ITALY UKTI CONTACT IN ITALY BY VOLUME)

United Kingdom HMRC Export Statistics To Italy									
Commodity: 03, Fish And Crustaceans, Molluscs And Other Aquatic Invertebrates									
Year To Date: January - December									
Commodity	Unit	Description	Quantity			% Share			% Change
			2010	2011	2012	2010	2011	2012	2012/2011
03	T	Fish, Crustaceans & Aquatic Invertebrates	17,092	15,752	15,111	100	100	100	-4.07
0307	T	Molluscs & Aqua Invert Nesoi, Lve Etc.; Flours Etc	6,073	5,415	6,280	35.53	34.37	41.56	15.98
0306	T	Crustcns Lve Frsh Etc, Ckd Etc.; Flrs Mls H Cnsump	8,221	7,103	6,018	48.1	45.09	39.82	-15.28
0305	T	Fish, Dried, Salted Etc, Smoked Etc; Ed Fish Meal	1,005	1,063	1,025	5.88	6.75	6.78	-3.6
0304	T	Fish Fillets & Oth Fish Meat, Fresh, Chill Or Froz	606	886	883	3.55	5.62	5.84	-0.32
0302	T	Fish, Fresh Or Chilled (No Fillets Or Other Meat)	956	1,173	619	5.59	7.45	4.09	-47.25
0303	T	Fish, Frozen (No Fish Fillets Or Other Fish Meat)	217	104	280	1.27	0.66	1.86	170.59
0301	T	Fish, Live	14	9	7	0.08	0.06	0.05	-20.91

Source of Data: Her Majesty's Customs & Excise

United Kingdom HMRC Export Statistics To Italy Commodity: 0303, Fish, Frozen, Excluding Fish Fillets And Other Fish Meat Without Bones; Fish Livers And Roes, Frozen Year To Date: January - December									
Commodity	Unit	Description	Quantity			% Share			% Change
			2010	2011	2012	2010	2011	2012	2012/2011
0303	T	Fish, Frozen (No Fish Fillets Or Other Fish Meat)	217	104	280	100	100	100	170.59
030313	T	Atlantic Salmon And Danube Salmon, Frozen	0	0	158	0	0	56.36	n/a
030354	T	Mackerel, Frozen	0	0	99	0	0	35.34	n/a
030389	T	Fish, Frozen, Nesoi	0	0	23	0	0	8.09	n/a
030311	T	Sockeye Salmon, Excl Fillet, Livers & Roes, Frozen	1	1	1	0.57	1.25	0.21	-53.48
030374	T	Mackerel Except Fillets, Livers And Roes, Frozen	45	44	0	20.74	42.76	0	-100
030377	T	Sea Bass Except Fillets, Livers And Roes, Frozen	1	9	0	0.6	8.8	0	-100
030379	T	Fish, Nesoi, With Bones, Frozen	169	26	0	78.06	24.68	0	-100
030319	T	Pacific Salmon, Nesoi, Excl Filet, Liver,Roe, Froz	0	0	0	0	0.11	0	-100
030322	T	Atlantic And Danube Salmon, With Bones, Frozen	0	5	0	0	4.35	0	-100
030339	T	Flat Fish Nesoi Except Fillets, Livers, Roes, Frz	0	0	0	0.02	0.17	0	-100
030351	T	Herrings, Frozen, Except Fillets, Livers And Roes	0	18	0	0	17.82	0	-100
030352	T	Cod, Frozen, Excluding Fillets, Livers And Roes	0	0	0	0	0.06	0	-100

Source of Data: Her Majesty's Customs & Excise

United Kingdom HMRC Export Statistics To Italy Commodity: 0302, Fish, Fresh Or Chilled, Excluding Fish Fillets And Other Fish Meat Without Bones; Fish Livers And Roes, Fresh Or Chilled Year To Date: January - December									
Commodity	Unit	Description	Quantity			% Share			% Change
			2010	2011	2012	2010	2011	2012	2012/2011
0302	T	Fish, Fresh Or Chilled (No Fillets Or Other Meat)	956	1173	619	100	100	100	-47.25
030289	T	Fish, Fresh Or Chilled, Nesoi	0	0	401	0	0	64.83	n/a
030214	T	Atlantic Salmon And Danube Salmon Fresh Or Chilled	0	0	135	0	0	21.86	n/a
030223	T	Sole Except Fillets, Livers & Roes, Fresh, Chilled	0	1	32	0.02	0.05	5.25	5575.35
030279	T	Nile Perch And Snakeheads, Fresh Or Chilled	0	0	16	0	0	2.65	n/a
030229	T	Flatfish Nesoi Except Fillet, Liver Roe Fresh/Chld	7	4	9	0.73	0.3	1.52	168
030281	T	Dogfish And Other Sharks, Fresh Or Chilled	0	0	6	0	0	0.95	n/a
030244	T	Mackerel, Fresh Or Chilled	0	0	5	0	0	0.87	n/a
030284	T	Seabass, Fresh Or Chilled	0	0	2	0	0	0.4	n/a
030242	T	Anchovies, Fresh Or Chilled	0	0	2	0	0	0.35	n/a
030243	T	Sardines Sardinella Brislings/Sprats Fresh/Chilled	0	0	2	0	0	0.35	n/a
030213	T	Pacific Salmon, Fresh Or Chilled	0	0	2	0	0	0.34	n/a
030251	T	Cod, Fresh Or Chilled	0	0	2	0	0	0.33	n/a
030224	T	Turbots, Fresh Or Chilled	0	0	1	0	0	0.14	n/a
030285	T	Seabream, Fresh Or Chilled	0	0	1	0	0	0.1	n/a
030254	T	Hake, Fresh Or Chilled	0	0	0	0	0	0.03	n/a

030259	T	Fish Of Fam Bregmacerotidae Etc Fresh/Chilld Nesoi	0	0	0	0	0	0.02	n/a
030253	T	Coalfish, Fresh Or Chilled	0	0	0	0	0	0.02	n/a
030250	T	Cod Except Fillets, Livers & Roes, Fresh, Chilled	7	3	0	0.7	0.23	0	-100
030261	T	Sardines Except Fillet, Liver, Roe, Fresh, Chilled	2	5	0	0.16	0.4	0	-100
030263	T	Atlantic Pollock Except Fillet, Liver, Roe, Fr, Ch	2	1	0	0.23	0.11	0	-100
030264	T	Mackerel Except Fillet, Liver, Roe, Fresh, Chilled	8	35	0	0.86	2.97	0	-100
030265	T	Dogfish, Other Shark Excpt Fillet Liver Roe, Fr/Ch	15	7	0	1.57	0.6	0	-100
030269	T	Fish, Nesoi, With Bones, Fresh Or Chilled	663	782	0	69.41	66.67	0	-100
030270	T	Fish Livers And Roes, Fresh Or Chilled	0	0	0	0	0	0	-100
030240	T	Herrings Except Fillets, Livers, Roes, Fresh, Chld	4	0	0	0.42	0	0	n/a
030212	T	Salmon, Pac, Atl & Danube, With Bones, Fr Or Chill	247	336	0	25.89	28.66	0	-100
030219	T	Salmonidae, Nesoi, Fresh Or Chilled	0	0	0	0	0.02	0	-100
030221	T	Halibut/Greenland Turbot Ex Fillet, Lvr, Roe Fr/Ch	0	0	0	0	0	0	-100

Source of Data: Her Majesty's Customs & Excise

Commodity: 0306, Crustaceans, Live, Frsh, Chilled, Frzn Etc.; Crustaceans, In Shell, Cookd By Stm Or Boilng Watr; Flours, Meals, & Pellets Of Crustaceans, Hum Consumpt									
Year To Date: January - December									
Commodity	Unit	Description	Quantity			% Share			% Change
			2010	2011	2012	2010	2011	2012	2012/2011
0306	T	Crustcns Lve Frsh Etc, Ckd Etc.; Flrs Mls H Cnsump	8,221	7,103	6,018	100	100	100	-15.28
030615	T	Norway Lobsters, Frozen	0	0	4,107	0	0	68.25	n/a
030617	T	Shrimps And Prawns, Frozen, Nesoi	0	0	1,004	0	0	16.68	n/a
030624	T	Crabs, Raw (Live Etc), Cooked (Stm Etc) Not Frozen	283	427	368	3.45	6.01	6.12	-13.78
030625	T	Norway Lobsters, Not Frozen	0	0	325	0	0	5.39	n/a
030626	T	Cold-Water Shrimps And Prawns, Not Frozen	0	0	80	0	0	1.32	n/a
030622	T	Lobsters, Live, Fresh,Ch, Dried, Saltd Or In Brine	29	42	43	0.35	0.6	0.72	2.7
030629	T	Crustcns Nesoi Lve/Fr/Chl/Dry/Sltd/Brn Flrs H Cnsm	462	509	33	5.62	7.16	0.55	-93.49
030614	T	Crabs, Including In Shell, Frozen	55	37	32	0.67	0.52	0.53	-12.29
030619	T	Crustaceans Nesoi Ckd Stmg/Boilg Frzn Flrs Mls Etc	5,861	4,848	10	71.3	68.24	0.17	-99.79
030612	T	Lobsters, Including In Shell, Frozen	3	6	7	0.04	0.09	0.11	8.23
030627	T	Shrimps And Prawns, Except Cold-Water, Not Frozen	0	0	7	0	0	0.11	n/a
030621	T	Rock Lobster, Other Sea Crawfish Lv/Ch/Drd/Salted	1	1	2	0.01	0.02	0.03	76
030613	T	Shrimps And Prawns, Including In Shell, Frozen	1,370	1,126	0	16.66	15.85	0	-100
030623	T	Shrimps/Prawns Inc Live, Fr/Ch/Drd/Salted/In Brine	156	108	0	1.9	1.52	0	-100

United Kingdom HMRC Export Statistics To Italy Commodity: 0307, Molluscs & Oth Aquatic Invertebrates Nesoi, Live, Frsh, Childld, Frzn, Dried, Saltd Or In Brine; Flours, Meals & Pellets Of Aqua Inverteb Hum Consumptn									
Year To Date: January - December									
Commodity	Unit	Description	Quantity			% Share			% Change
			2010	2011	2012	2010	2011	2012	2012/2011
0307	T	Molluscs & Aqua Invert Nesoi, Lve Etc.; Flours Etc	6,073	5,415	6,280	100	100	100	15.98
030729	T	Scallops Incl Queen, Frozen/Dried/Salted/In Brine	2,402	2,550	2,490	39.55	47.1	39.66	-2.35
030749	T	Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine	904	983	1,508	14.89	18.16	24.01	53.35
030721	T	Scallops Incl Queen Scallops, Live, Fresh, Chilled	1,365	1,358	1,477	22.48	25.08	23.52	8.78
030741	T	Cuttle Fish & Squid, Live, Fresh Or Chilled	1,261	517	801	20.76	9.55	12.76	55.05
030791	T	Molluscs Etc Nesoi, Live, Fresh Or Chilled	4	2	1	0.06	0.04	0.02	-32.32
030779	T	Clams, Cockles And Ark Shells, Nesoi	0	0	1	0	0	0.02	n/a
030711	T	Oysters, Live, Fresh Or Chilled	0	0	0	0	0	0	n/a
030710	T	Oysters, Live, Fresh, Chilled, Frozen, Etc	2	0	0	0.03	0.01	0	-100
030731	T	Mussels, Live, Fresh Or Chilled	3	0	0	0.05	0	0	n/a
030739	T	Mussels, Frozen, Dried, Salted Or In Brine	116	1	0	1.91	0.02	0	-100
030760	T	Snails Nesoi Live/Frsh/Chld/Frz/Drd/Salted/In Brine	0	0	0	0	0	0	-100
030799	T	Molluscs Etc Nesoi, Frozen, Dri, Salted Or In Brine	16	2	0	0.27	0.04	0	-100

Source of Data: Her Majesty's Customs & Excise