





Market reports | Industry issues | Country profile

Quality Assurance | Labelling and Traceability | Retail Trends | Regulations, Tariffs | Processing | Aquaculture

## Mussels - August 2006



### Further increase in Chilean supplies to European mussel markets

Processed (including frozen and preserved) mussel imports are up in key European markets this year thanks to increasing supplies of Chilean farmed mussels. Mussel production in Chile continues to expand helping Chile to maintain its leading position as a supplier of frozen mussels to the French, Spanish and Italian markets. Imports of processed mussels increase in all three markets during the early months of 2006 with Italy showing the strongest growth rate.

### French processed mussel imports marginally up in 2006

Although French imports of live and chilled mussels fell by 4% last year to 44 000 tonnes, imports of processed mussels increased by 5% to almost 15 000 tonnes. Figures for the first five months of 2006 suggest that French

importers will maintain last year's level for processed mussel imports during the current year. Volumes for the January-May period are marginally up on the same period in 2005 at 6 300 tonnes.

The relative stability in French processed mussel imports this year masks significant variations in importer shares. Imports from Chile are up at least a third on the same period last year while imports from both Denmark and the Netherlands are down around 30%. The Chilean share of total volume imports is up from 25% for January-May 2005 to 33% this year. Similar changes are evident in value terms with French imports from Chile up 34% to almost €4.3 million while Denmark, the largest supplier to France in value terms during 2005, is down 29% to €2.7 million. Average unit values for imports remain largely unchanged at just under €2.60/kg suggesting no great movement in import prices this year.

### Jump in Italian imports from Turkey

Last year Italy imported slightly over 9 000 tonnes of processed mussels, more or less in line with 2004 volumes. On current trends, imports should easily breach the 10 000 tonne level this year. Volumes for the first four months of 2006 are up 36%, to 4 300 tonnes, compared with the same period in 2005. The growth in import values is stronger at over 50%, to €11.5 million, pointing to an increase in average import prices this year.

The strong growth in Italian imports this year is due to a jump in volumes from Turkey which more than doubled sales to Italy during the January-April period this year compared to the first four months of 2005. More moderate increases are reported for other key supplying countries such as Chile and Spain. Chile nevertheless remains the leading mussel supplier to the Italian market during the four month period although its share of total imports has fallen from 43% last year to 34%.

### European Markets: Frozen & Prepared Mussel Imports (tonnes)

	2005	2006	%
France <sup>1</sup>	6 260	6 300	+1
Spain <sup>1</sup>	4 470	4 790	+7
Italy <sup>2</sup>	3 150	4 290	+36

<sup>1</sup> Jan-May; <sup>2</sup> Jan-Apr  
National trade statistics

### French Frozen & Prepared Mussel Imports Jan-May (tonnes)

	2005	2006	%
Chile	1 550	2 080	+34
Ireland	1 330	1 400	+5
Denmark	1 370	930	-32
Netherlands	950	700	-26
Others	1 060	1 190	+12
<b>Total</b>	<b>6 260</b>	<b>6 300</b>	<b>+1</b>

### Italian Frozen & Prepared Mussel Imports Jan-Apr (tonnes)

	2005	2006	%
Chile	1 340	1 480	+10
Turkey	540	1 310	+143
Spain	540	660	+22
Others	730	840	+15
<b>Total</b>	<b>3 150</b>	<b>4 290</b>	<b>+36</b>

Chile consolidates leading import position in

### Spanish Frozen & Prepared Mussel Imports Jan-May (tonnes)

	2005	2006	%
Chile	2 620	3 650	+39
New Zealand	1 560	890	-43
Others	290	250	-14
<b>Total</b>	<b>4 470</b>	<b>4 790</b>	<b>+7</b>

### the Spanish market

Spain remains the main European destination for Chilean mussels, a reflection of close links between the Spanish and Chilean mussel industries. Volumes continue to expand with Spanish imports up almost 40% for the January-May period this year to over 600 tonnes. In contrast to Italian imports, the Chilean share of total Spanish processed imports is increasing, moving from less than 60% last year

over three quarters this year. This increase has come at the expense of New Zealand whose share of Spanish imports dropped from 35% during the first five months of 2005 to less than 20% this year.

### Further market penetration likely for Chilean mussels

The expansion of Chilean mussel production looks set to continue with volumes increasing from an estimated 100 000 tonnes in 2005 to over 150 000 tonnes by 2010. For the moment, European markets have been absorbing increased supplies without much, if any, significant weakening in price levels. At a reasonable import growth rate, European markets may be expected to increase purchases from Chile at current price levels. A key, but uncertain, parameter is the level of domestic European mussel production.

By Gerry O'Sullivan (GLOBEFISH)  
© FAO GLOBEFISH 2006