



Intra-Nordic Barriers to Seafood Trade



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Mandate

In spring 2007 the Nordic Council of Ministers established a working group consisting of representatives from the fish industry organisations in the Nordic countries to look into possible intra-Nordic barriers to seafood trade. The report is a result of the work made by processing and exporters organisations from Iceland, the Faroe Islands, Denmark and Norway. It therefore focuses on these four countries in particular although their trade with Sweden and Finland are also commented. The work has been led by Pétur Bjarnason from the Fisheries Association of Iceland. Eurofish International Organisation has served as secretariat throughout the process.

Introduction

The Nordic countries are important traders in seafood. Norway, Denmark, Iceland and the Faroe Islands are all substantial exporters. However, Denmark is the only Nordic country that buys important volumes of seafood. This reflects Denmark's role as a transit country as well as a processor of seafood. As consumer markets the Nordic region is, however, of limited interest due to the relative low number of inhabitants.

Denmark, Sweden and Finland and Åland Islands are members of the EU while the Faroe Islands, Iceland and Norway and Greenland are not. Iceland and Norway are members of the European Free Trade Association (EFTA). The countries' different status with respect to the EU is a key element in understanding the current trade patterns in the Nordic region. In many ways the trade mirrors the trade conditions the respective countries have with the EU.

The working group has limited itself to looking at trade barriers that can be dealt with in a Nordic context. Even though trade in seafood among the Nordic countries goes relatively smoothly, there is still room for making the current trade more efficient.

The report gives an overview of the trade taking place between the Nordic countries, the trade regimes in operation, intra-Nordic barriers to trade and finally it recommends measures to facilitate trade in the Nordic region.

Overview of trade

The Norwegian Seafood Export Council (NSEC) has provided the working group with trade statistics based on data for seafood for consumption. The use of these data permits a comparison between the four countries. It should, however, be noted that a comparison on selected items between NSEC data and national data show certain differences, which are owed to different ways of compiling data. It should also be noted that the used data, being limited to “seafood for consumption” (with HS codes¹ starting with 03 and 1604-1605) do not reflect the overall trade in volume and value for each country, which also include raw materials, oil and meal and by-products.

The report focuses on 2006 in particular but also takes a look at the trade pattern in 2001.

Norway is the biggest exporter in the region followed by Denmark and thereafter Iceland. As regards imports, Denmark is the biggest importer followed by Norway.

The key import and export data (seafood for consumption) for the four countries are shown in Table 1.

Table 1: Key trade figures in seafood for consumption for Denmark, Faroe Islands, Iceland and Norway

Country	2001				2006			
	Import		Export		Import		Export	
	Tonnes	1000 Euro	Tonnes	1000 Euro	Tonnes	1000 Euro	Tonnes	1000 Euro
Denmark								
Nordic countries	456.346	1.170.022	89.789	217.270	396.418	1.135.966	80.071	253.945
Total	701.571	1.861.082	790.589	2.738.658	680.968	1.966.929	719.239	2.730.057
Faroe Islands								
Nordic countries	843	1.434	133.481	266.781	817	3.008	25.813	63.970
Total	6.433	10.297	206.636	522.259	3.643	7.650	148.035	402.394
Iceland								
Nordic countries	22.168	29.780	25.289	63.955	23.742	26.324	27.021	56.019
Total	47.023	59.698	331.867	1.205.329	49.165	60.164	453.133	1.242.466
Norway								
Nordic countries	99.650	136.226	270.361	658.809	46.646	122.633	259.975	739.930
Total	366.412	552.806	1.727.504	3.828.621	149.927	364.151	1.642.363	4.462.792

¹ Harmonized System (HS) customs nomenclature

Source: Norwegian Seafood Export Council

Iceland

In 2006 Iceland exported in total some 661 000 tonnes of seafood worth about 1.42 billion EUR. Total imports amounted to 126 000 tonnes worth 60 million EUR. Iceland's trade in seafood with the other Nordic countries is relatively modest. In 2006 Iceland exported about 6 per cent of its total volume of seafood to these countries. In value this represented about 4.5 per cent.

In 2006 the Faroe Islands were the biggest Nordic buyer in terms of volume with close to 50 per cent of Iceland's exports to the Nordic countries while Denmark remained the biggest importer in terms of value. However, in 2001 the Icelandic exports to the Faroe Islands were almost non-existent. The exports to the Faroe Islands are almost exclusively direct landings of pelagic species like blue whiting, herring and capelin. The fish goes to fishmeal and oil production. The exports take place when the price for the fish is higher and the fuel price lower than in Iceland. Processed shrimp is the key exported item to Denmark followed by salmon.

The Icelandic exports to all other Nordic countries were considerably lower in 2006 than in 2001. As regards imports from the region, they are at about the same level as the exports in volume but considerably lower in value.

Iceland mainly exports its seafood to the EU, USA and some countries in Asia. This export pattern is not likely to change in the foreseeable future. Iceland's trade with the Nordic region is shown in table 2.

Table 2: Iceland's trade in seafood for consumption with the Nordic region

Country		Tonnes		1000 Euro	
		2001	2006	2001	2006
Denmark	Export	9.400	7.909	31.210	26.802
	Import	1.399	2.619	2.006	3.777
Faroe Islands	Export	58	13.112	162	10.386
	Import	1.683	4.429	1.192	2.544
Finland	Export	1.177	948	1.675	1.806
	Import	-	4	-	9
Norway	Export	8.775	2.761	15.716	10.041
	Import	19.048	16.649	26.405	19.867
Sweden	Export	5.879	2.291	18.192	6.983
	Import	38	41	176	128

Denmark

In contrast to the three other Nordic countries Denmark's trade in seafood for consumption is characterized by imports being very important and close to its exports in size. This picture reflects Denmark's role as a transit country as well as a processor of seafood for further export. In 2006 the total exports of fish and fish products amounted to 1 million tonnes and total imports to 1.5 million tonnes. Of this the exports of seafood for consumption corresponded to 719.000 tonnes and the imports to 681.000 tonnes.

Imports and exports of seafood for consumption were somewhat lower in 2006 than in 2001. A more thorough analysis would be needed in order to determine whether this is a yearly variation or a trend. However, imports of aquaculture products from Asia have been moved from Danish to German harbours and therefore registered as German imports. The explanation may therefore be of a statistical nature.

About 10 per cent of total Danish exports go to the other Nordic countries. Sweden is the most important buyer followed by Norway. The most important export product to Sweden is frozen and processed shrimp. In general, a large share of the Danish exports to the Nordic countries is in the form of processed seafood. However, as regards Norway the most important items in terms of volume are fresh herring and mackerel directly landed by Danish vessels.

The Nordic neighbours, in particular Norway, are key providers of raw material with more than 50% of the total Danish imports in 2006. Norway is by far the biggest supplier among the Nordic countries with more than 60%. The Danish imports from the Faeroe Islands were considerably lower in 2006 than in 2001 partly due to the Faroese problems with salmon disease.

Even though the Nordic countries continue to be important providers of raw material, Danish imports from other countries increase at a rapid pace. The increase is particular due to farmed seafood products from Asia like pangasius, black tiger shrimp and tilapia. There has also been a tremendous increase in imports of fillets from China. It is expected that farmed seafood from Asia will continue to increase in importance the next few years ahead, while Norwegian farmed salmon and cold water shrimps from Greenland still will be important for the supply of seafood to Denmark. Denmark's trade with the other Nordic countries is shown in table 3.

Table 3: Denmark's trade in seafood for consumption with the Nordic countries

Country		Tonnes		1000 Euro	
		2001	2006	2001	2006
Faroe Islands	Export	1.791	2.318	798	2.166
	Import	85.695	39.085	279.629	149.002
Finland	Export	3.575	6.330	12.015	24.011
	Import	1.649	1.008	3.007	1.860
Iceland	Export	373	3.263	424	7.107
	Import	9.508	10.138	33.878	32.928
Norway	Export	34.281	21.984	45.111	49.249
	Import	272.540	270.137	748.329	857.422
Sweden	Export	49.769	46.176	158.922	171.412
	Import	86.954	76.053	105.179	94.754

The Faroe Islands

In 2006 the total exports of fish and fish products from Faroe Islands amounted to 317 000 tonnes and 485 million EUR, of which close to 150.000 tonnes were seafood for consumption worth some 400 million EUR. About 18% of the total exports in volume and somewhat less in value went to the Nordic countries. However, this picture was completely different in 2001. In 2001 the Nordic countries bought close to 65 per cent of the total exported volume.

Historically, Denmark and the United Kingdom were key markets for seafood from the Faroe Islands. Denmark was important as a transit country as well as a processor of raw material for re-export. This role has been reduced over the last few years due to a combination of a decrease in the Faroese salmon production, the fact that the Faroe Islands have succeeded in increasing their own value added production and that the Faroe Islands in 2001 concluded a veterinary agreement with the EU making direct export to other EU countries more profitable. Before the veterinary agreement an important share of the Faroese exports passed through Faroese companies located in Denmark before entering other EU countries. After 2001 this pattern is gradually changing.

As regards Icelandic-Faroese trade there has been an increase in the Faroese direct landings of raw shrimp and fresh herring in Iceland. This can be explained by an increase in the Faroese catches, better prices in Iceland and by the fact that the only shrimp processing plant in the Faroe Islands is closed due to low earnings. The shrimp fleet thus has to deliver abroad.

The total exports from the Faroe Islands in 2006 was more than 25 per cent lower in volume than in 2001 mainly due to a drop in salmon exports. 2006 is regarded as an all time low for the Faroese salmon industry and the exports are expected to pick up again in 2007.

The Faroese imports of seafood are modest, also from the Nordic countries. In 2006 the highest imported volume came from Iceland while Norway was the most important provider in terms of value. The Faroese trade in seafood for consumption is shown in table 4

Table 4: The Faroe Islands' trade in seafood for consumption with the Nordic countries.

Country		Tonnes		1000 Euro	
		2001	2006	2001	2006
Denmark	Export	68.800	12.925	195.414	42.093
	Import	287	190	763	686
Finland	Export	66	879	189	2.300
	Import	-	-	-	-
Iceland	Export	4.818	3.226	16.457	3.513
	Import	154	283	296	857
Norway	Export	57.779	7.270	46.404	12.473
	Import	400	330	360	1.403
Sweden	Export	904	1.514	3.966	3.590
	Import	3	13	15	62

Norway

In 2006 total Norwegian exports amounted to 1.9 million tonnes of seafood worth close to 4.6 billion EUR, of which exports of seafood for consumption amounted to 1.6 million tonnes and 4.4 billion EUR.

The Nordic countries are traditionally important buyers of Norwegian seafood, both as consumer markets and transit countries. In 2006 Norway exported about 17% per cent of its total exports of seafood for consumption to the Nordic countries representing some 260 000 tonnes worth 0.75 billion EUR.

The Nordic countries have a larger share of the fishery products imported to Norway, about 43 per cent in value terms in 2006. This is related to the fact that Norway imports relatively small amounts of fish. Most of the imported fish is directly landed at Norwegian sites.

Denmark was the second biggest market for Norway in 2006 in general and as such by far the most important importer of the Nordic countries. Salmon is the dominating species traded and illustrates very well the different roles Denmark plays as an importer of seafood from Norway. According to Norwegian data Denmark imported altogether 92 000 tonnes of Norwegian salmon in 2006. 53 000 tonnes of this salmon went in transit through Denmark. The remaining 39 000 tonnes were partly consumed and partly further processed in Denmark. The EU has 13 per cent tariff on salmon smoked in Norway and as a result smoking of Norwegian salmon mostly takes place in the EU, amongst other countries Denmark.

The trade with Sweden is also characterised by transit to other EU countries. This is a purely technical matter since goods often are declared at the outer border of the EU. Salmon is again the most important species traded. The production of smoked salmon in Sweden has increased considerably since 1995. The Swedish share of the domestic market for smoked salmon has increased from 10-20 per cent in the 90ies to about 75 per cent after year 2000. The Norwegian market share has on the other hand decreased from 30-40 per cent in the mid 90ies to 10 per cent in year 2000. It is assumed that the 13 per cent tariff efficiently shields the industry in the EU and serves as an incentive for growth for the Nordic countries that are members of the EU.

The Norwegian exports to Iceland are relatively small and have the last few years been dominated by raw shell-on shrimp. The shrimps have either been landed directly in Iceland or through reloading in a Norwegian harbour. This trade is a direct result of the EU tariffs on peeled shrimp from Norway. When Norwegian shrimp are processed on Iceland they get Icelandic origin and can be imported duty-free to the EU. On imports from Norway the same shrimp would be subject to a 7.5 tariff rate.

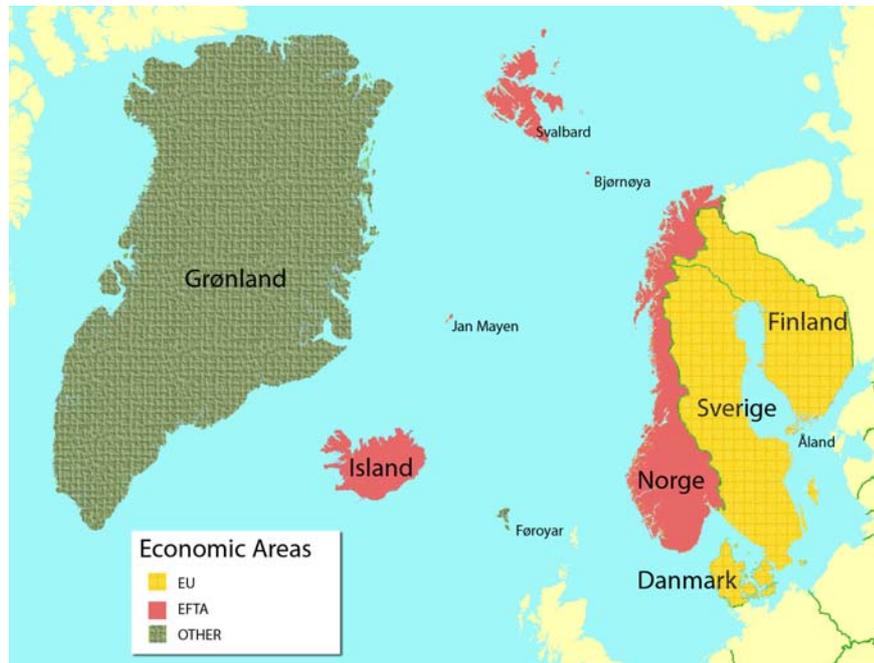
Norway's export of seafood for consumption to the other Nordic countries is shown in table 5.

Table 5: Norway's export of seafood to the Nordic countries²

Country	Tonnes		1000 Euro	
	2001	2006	2001	2006
Denmark	116.359	149.492	272.716	344.847
Finland	13.304	20.865	45.913	80.304
Iceland	7.262	13.283	10.285	17.399
Faroe Islands	1.825	1.167	451	1.667
Sweden	33.184	34.269	138.969	158.782

² The export figures add up to 100 000 tonnes less than Norway's total export figure for the Nordic countries in table 1, as the statistics used for table 5 probably include less positions than in the statistics used for table 1. A large part of the export to Denmark and Sweden is re-exported to other countries.

The trade regimes in operation



Overview

Denmark, Finland and Sweden are members of the EU. Iceland's and Norway's relations with the EU are governed by the EEA agreement as well as bilateral agreements, while there is a bilateral trade agreement between the Faroe Islands and the EU.

Trade between Iceland and Norway is governed by the EFTA Convention; while trade between the Faroe Islands and Iceland and Norway, respectively, are covered by bilateral trade agreements.

In general terms the EU import policy protects the EU processing industry through tariffs on processed and finished products and favouring imports of raw material for processing in the EU.

On the other hand the exporters of raw materials impose restrictions on their fish exports.

EU Trade Policy

The EU trade policy is characterised by the position of the EU as one of the big global trade partners and, as is the case for fish products, by its position as net importer with a big demand of raw material for its consumption market and processing industry.

The EU trade policy is complex and consists of many multilateral and bilateral agreements which reflect different factors such as historical trade relations and development objectives.

Seen from the perspective of the Nordic countries, 3 countries are members of the EU (Denmark, Finland with Åland Islands, Sweden), 2 countries are members of EFTA (Iceland and Norway), the Faroe Islands are 3rd Country with a bilateral agreement and Greenland has the status of Overseas Country and Territory (OCT) conditioned by its fisheries agreement with the EU.

In fish trade the EU generally favours the entry of raw materials with lower or no import duties compared to the higher duties on processed fish. However, multilateral and bilateral trade agreements provide for exceptions in terms of tariff reductions or import quotas. With changing global trade patterns and the inflow of semi-processed fish fed into the EU's processing industry, the distinction between raw material and processed imports is now weaker than earlier.

The above mentioned elements are reflected both in the EEA agreement and in the bilateral agreements between the EU and Iceland and Norway respectively. An example is the different trade regime applied to shrimp from Norway and Iceland.

The EU applies antidumping measures when the price of imported products is lower than for EU produced products. In these cases the EU sets a minimum price as is the case with salmon from Norway. A panel report on antidumping and minimum prices is expected to be published by WTO in November 2007.

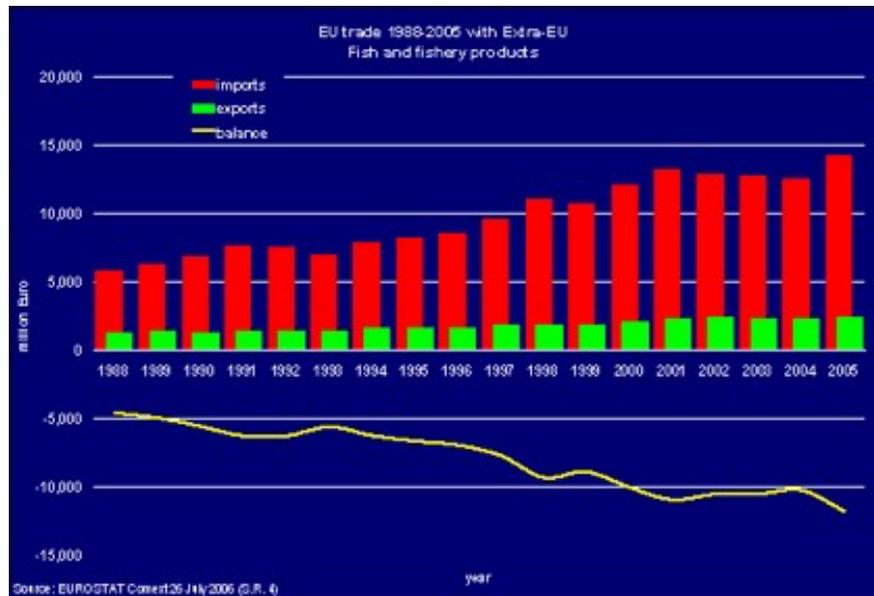
The EU fisheries trade regime also includes autonomous measures to improve the supplies of raw materials to the EU fish processing industry. These comprise the total or partial suspension of import duties; and the provision of tariff quotas for certain fishery products. The tariff quotas are set for 3 years (the present one running from 2007 to 2009) and are managed on a first come first served basis within the Community.

As a consequence of its enlargement the Community has awarded duty free import quotas to Iceland and Norway as compensation for the previous bilateral trade agreements held by these countries with the new EU Member States.

An overview of the European Community's trade in fishery products can be seen on the following web page, which includes detailed information on the Community's trade with Norway and Iceland:

http://ec.europa.eu/trade/issues/sectoral/agri_fish/fish/index_en.htm

The development of EU's trade in fishery products is shown in the figure below:



EEA and Bilateral Trade Agreements

The EEA agreement entered into force in January 1994 and governs the trade relations between the EU on one side, and the EFTA countries Iceland, Liechtenstein and Norway on the other.

On the basis of Protocol 9 to the EEA Agreement customs duties on most types of whitefish products have been abolished while there are substantial reductions in customs duties for other fish and processed fish products. However, the Agreement does not cater for reductions in the customs duties for some of the most important species in Iceland and Norway. The species not covered by the EEA Agreement are salmon, herring, mackerel, shrimps and prawns, coquilles St. Jacques and Norway lobsters. However, some of these products, as well as some products that are covered by Protocol 9, get preferential treatment based on bilateral arrangements. Norway and Iceland have bilateral agreements with the EU dated 1973 and 1972, respectively.

Since the tariffs are a result of a combination of Protocol 9 to the EEA Agreement and bilateral arrangements, the tariffs on certain products can vary considerably for some products with Icelandic and Norwegian origin. These differences appear for instance to have an effect on the trade flows of shrimps by directing raw shrimp of Norwegian origin to Iceland for processing and re-export to the EU. Another example of different tariffs is that Iceland has zero tariffs to the EU on fillets of herring while Norway has a tariff of 3 per cent.

Upon the enlargement of the EU in 1986, 1995, 2004 and 2007³ bilateral duty-free quotas were established between the Community and Iceland and between the Community and Norway. The quotas agreed upon were based on historic trade flows between the new EU members and Norway and between the new EU members and Iceland. The size of the quotas is not adjusted to take into account new trade developments. They are opened yearly for the same volume on a first come, first served basis.

The EEA Agreement does not prevent the EU from applying safeguard measures, such as anti-dumping duties and countervailing measures, on fish products.

The Faroe Islands and the EU

The Faroe Islands are not a member of the EU. A bilateral trade agreement with the EU gives zero tariff on almost all Faroese seafood. The exceptions are shrimp, fish feed and preserves of salmon, trout and other fish. However, there are duty-free quotas for these products.⁴

The Faroe Islands and the EU concluded a veterinary agreement in 2001 making the Faroe Island part of the EUs veterinary area together with the EEA countries.

Greenland and the EU

Greenland opted out of the European Community in 1985 after which a fisheries agreement was agreed on between Greenland and the EC. The fisheries agreement gave Greenland full duty free export rights for fish to the Community as long as the fisheries agreement is considered satisfactory by the Community. Greenland became later part of the Overseas Countries and Territories (OCT) regime, which also gives duty free export rights, but in the case of Greenland, still on condition of a satisfactory fisheries agreement for the Community.

An overview of Greenland's fishery agreements is given on the following website:

http://dk.nanoq.gl/Groenlands_Landsstyre/Direktoratet_for_Fiskeri_og_Fangst-/Fiskeri/Internationale_relationer_og_aftaler/Internationale_fiskeriaftaler.aspx

³ Spain and Portugal became members of the EU in 1986, Austria, Finland and Sweden joined the EU in 1995 and another ten countries joined the EU in 2005. Romania and Bulgaria joined the EU 1 January 2007.

⁴ Duty-free quotas: shrimp 5 000 tonnes, fish feed 10 000 tonnes, salmon preserves 400 tonnes, trout preserves 700 tonnes and other seafood preserves 1 200 tonnes.

The Faroe Islands, Iceland and Norway

The EFTA Convention provides for free trade in seafood between Iceland and Norway.

Trade in seafood between the Faroe Islands and Iceland and Norway, respectively, is governed by bilateral trade agreements that provide for practically free trade in seafood between the parties.

Greenland has fisheries agreements with Norway, the Faroe Islands and Iceland.

Norway and Denmark – possible developments

As regards how Norway's trade with the Nordic countries will develop in the future will depend on a number of factors, whereof EU membership is a key factor. However, it is not expected that Norway will become a member of the EU in the course of the coming five years.

It is expected that the trade with Nordic countries will remain at about the same level as today the next few years ahead. However, there are discussions related to how Denmark's role as a processor of imported raw material will develop in the future in view of the ambitions of the Polish and Dutch industry as well as the growth in the processing industry in Asia.

Intra-nordic barriers to seafood trade

Direct landings

Direct landings is listed here as a possible trade barrier factor. On one side the Nordic countries may have or have earlier had measures limiting the conditions for their national vessels landings abroad. On the other side foreign vessels may encounter limitations in the ports of the Nordic countries where they land their catches.

Conditions for national vessels landing in other countries

The Nordic countries have different approaches to direct landings of their vessels abroad.

Icelandic vessels can only deliver seafood to auctions abroad, which have been approved by Icelandic authorities. Measures are taken to ensure strict control of weighing and documentation of the landings in line with the control procedures in Iceland. Those vessels that land directly abroad were before penalized with a ten per cent increase in their registered catch based on the volume landed abroad, but this system does no longer exist. All vessels have to report to the Icelandic authorities and the landing abroad is limited to the approved harbours that implement the required control for weighing and reporting.

Faroese vessels can land up to 25 per cent of their catches of ground-fish abroad in the course of a four month period. If a vessel lands more than this the vessel will be penalized with a cut back in the number of fishing days.

Danish vessels have no general restrictions on landing their catches in foreign ports. Some restrictions apply for species under recovery plans.

Norwegian vessels have no restrictions on where to land their catches; however, catches have to be reported to a Norwegian sales organization, regardless of them being landed in a Norwegian or a foreign harbour.

If the catch is landed in a Norwegian harbour, the sales organisation will take a handling fee, regardless of the nationality of the vessel.

Conditions for landing implemented by the country where the fish is landed

In general it is fair to assume that the Nordic countries have no reason to limit the flow of raw materials landed by foreign vessels in their ports.

On the other hand there could be factors not intended as trade barriers as such, but which nevertheless could imply a different treatment of foreign vessels compared to national vessels. One such factor could be the different business conditions and procedures implemented by fishing ports depending on their status as state owned or private ports. Another factor could be the procedures related to the sales of the fish and by the fish auctions.

No clear evidence of such limitations has been submitted by the working group, but there are indications that factors limiting the flow of raw material do exist, and therefore it is suggested that this is an aspect that needs to be examined in more detail, and possibly lead to a standardization of – among others – landing conditions.

Production salmon

Denmark is interested in importing salmon of less quality than the best, so called production salmon fit for certain processed products, from Norway. Currently this is not possible because there is a Norwegian export ban on this salmon. Danish traders and producers are very interested in this salmon due to its favourable price. It is the view of the Danish industry that there is no foundation for the Norwegian export ban and that the Norwegian production salmon should, just as the production salmon from the Faroe Islands, be sold abroad. The Danish processing industry is capable of making the salmon comply with high hygienic standards. Today the production salmon is processed by the Norwegian industry and sold as fillets or portions on the domestic market or abroad.

The Norwegian salmon is subject to a minimum import price regime in the EU. The quality of the salmon is not registered upon imports to the EU. Future EU imports of production salmon would lower the average import price on Norwegian salmon without it being possible to trace this reduction back to increased imports of production salmon. It is therefore the view of the Norwegian industry that the risk of EU taking anti-dumping measures against Norwegian salmon could increase if Norway eliminates the current export ban.

Harmonisation of microbiological criteria

The EU has harmonized the microbiological criteria for food, including fish and fishery products. The Nordic non-EU members apply the same regulations as the EU members. However, the EU regulations open up for additional national regulations on aspects that are not covered by the EU-legislation. As a result there are still variations in the microbiological requirements between the Nordic countries. For instance, Norway and

Finland maintain zero tolerance for the *Vibrio* bacteria while Denmark has a higher degree of tolerance. In Denmark *Vibrio* is considered to be relatively harmless. Due to this difference there have been situations where crustaceans that have been approved in Denmark later have been rejected in Finland after identification of *Vibrio* below the Danish threshold. Subsequently, the Finnish authorities have issued rapid alerts to the other EU countries. These rapid alerts create confusion as to whether a withdrawal is called for in all EU countries. Different thresholds combined with rapid alerts create a potential for trade problems between the Nordic countries. National regulations concerning microbiological criteria in food will be repealed in Norway from the beginning of 2008.

Legal requirements concerning cooling temperature of perishable food, including seafood that is packed for the consumers, are different in the Nordic countries.

The impact of this is increased costs due to more complex logistics and might also have an impact of expected shelf-life indicated on the package as small increases in temperature might result in shorter shelf-life. A harmonisation of the legal requirements concerning cooling temperature of consumer-ready packages of perishable food, will remove this obstacle of trade between the Nordic countries.

Cod of Russian origin

The Danish processing industry imports cod from the Barents Sea which is processed at Norwegian plants. After a series of customs cases in 2000-2003 the origin of the fish, whether it was Norwegian or Russian, was put into question. Following thorough investigations by Norwegian authorities it was decided that the fish from Norway and Russia should be processed separately at the Norwegian plants (i.e separate production lines). This has been a serious impediment to Danish importers. The obligation to keep the fish physically separated is perceived as being too strict compared to normal EU practice where separate book-keeping is sufficient.

Salmon from the Baltic Sea

In Denmark it is forbidden to sell salmon above 4.4 kg from the Baltic Sea due to the level of dioxins and PCB. Swedish vessels may catch the fish and sell it on the domestic market but not export it. A similar arrangement is in place in Finland. The risk management of the salmon from the Baltic Sea should be co-ordinated among the Nordic countries so that the same rules apply for catching, selling and possibly also processing the fish.

Co-ordination of fishing in the Baltic Sea

The Danish fisheries regulations prevent the Danish and Swedish vessels in co-ordinating their fisheries in the Baltic Sea. An example is the fishing for sprats. Such limitations represent a barrier in making the harvest and supply of for instance fish for oil and meal in the Baltic Sea as efficient as possible. The fisheries authorities in Denmark, Sweden and Finland should provide for a common framework to favour co-fishery.

Assessment of landings

A possible issue to consider is to standardise the way fish landings are being quality assessed in different countries and ports to ensure that the quality of the landings correspond to market expectations. The relevance of this issue is underlined by the relative important patterns of vessels from one Nordic country landing fish in the ports of another Nordic country. At present the lack of standardisation has the effect of acting as a trade barrier in raw material between the respective Nordic countries.

Recommendations

Free trade

The working group considers that free trade should be the guiding principle for fish trade and that the objective of liberalising fishery trade should be pursued by their governments. The working group, however, recognizes the complexity of the trade policy regimes operating in the Nordic countries. It also recognizes the changing patterns in global fishery trade, which is playing an increasing role for the fishery industry in the Nordic countries.

The general recommendation of the working group is that the governments of the Nordic countries should hold trade liberalisation as an overall priority to be pursued in all trade related negotiations. Furthermore, considering the influence that EU trade policy has on the fishery trade relations between the Nordic countries, the working group recommends that the governments of the Nordic EU Member States to the greatest possible extent keep the objective of trade liberalisation as a guideline in trade related negotiations between the European Community and its trade partners.

Harmonisation of landing and sales procedures

Although the working group has given no clear evidence of limitations to the flow of raw material in connection with landing and sales procedures in the respective fish ports of the Nordic countries, the working group recommends that this aspect is examined in more detail, and that, if appropriate, standard procedures are applied by ports and first sales instances in the Nordic countries.

Harmonisation of fish landings assessment

The working group has pointed at differences occurring in the assessment of the quality fish landings which could affect the patterns of the raw material flow between the Nordic countries. Although the market value normally would match the actual quality of the landings the working group recommends that quality assessments of fish landings are standardised across the Nordic countries in order to make landing operations smoother in all Nordic fishing ports. The working group considers that harmonizing with EU rules would be the most adequate solution.

Harmonisation of microbiological and temperature criteria

The working group notes that the Nordic countries apply different microbiological criteria for and cooling temperature requirements for fish for consumption. The working group recommends that the authorities take initiative to harmonise the requirements concerning cooling temperature and microbiological criteria.

General approach for Nordic countries to remove trade barriers

The working group recommends that the Nordic countries' governments review and analyse the intra-nordic trade barriers listed in this report or otherwise identified, in order to remove problematic measures, if appropriate, and to consider common approaches and regulations in cases where a specific practice deviates from common Nordic practice.

Mandat og indledning

I foråret 2007 oprettede Nordisk Ministerråd en arbejdsgruppe med repræsentanter for fiskeriindustriens organisationer i de nordiske lande med henblik på at undersøge mulige hindringer for samhandelen med fiskeprodukter mellem de nordiske lande. Rapporten er udarbejdet af forarbejdnings- og eksportorganisationer fra Island, Færøerne, Danmark og Norge. Rapporten fokuserer således på disse fire lande men der er også set på samhandelen med Finland og Sverige. Arbejdet er blevet ledet af Pétur Bjarnason fra Islands Fiskeriforening. Eurofish International Organisation har været sekretariat for arbejdsgruppen.

De nordiske lande er vigtige handelspartnere indenfor fiskeri. Norge, Danmark, Island og Færøerne er alle store eksportlande. Danmark er dog det eneste nordiske land, som også aftager store mængder fiskeprodukter, hvilket afspejler Danmarks rolle både som transitland og som forarbejdningsland for fiskeprodukter. Som forbrugermarked er det nordiske område imidlertid mindre betydningsfyldt på grund af den relativt lave befolkningsmængde.

Danmark, Sverige og Finland, samt Åland er medlemmer af den Europæiske Union, men ikke Færøerne, Grønland, Island og Norge. Island og Norge er medlemmer af EFTA (Den Europæiske Frihandelssammenslutning). Landenes forskellige status i forhold til EU er en nøgle til forståelse af handelsmønstrene blandt de nordiske lande. På mange måder afspejler handelsmønstrene de handelsbetingelser, som de respektive lande har indgået med EU.

Arbejdsgruppen har begrænset sig til at undersøge de handelshindringer, der måtte være i nordisk sammenhæng. Selvom samhandel med fiskeprodukter mellem de nordiske lande foregår relativt smidigt, er der stadig mulighed for at den kan foregå på en mere effektiv måde.

Rapporten giver et overblik over samhandelen mellem de nordiske lande, eksisterende samhandelsregimer, handelshindringer mellem de nordiske lande og slutter med anbefalinger med henblik på at lette samhandelen med fiskeprodukter i Norden.