

Monthly Highlights

No. 6 / 2024

EUMOFA

European Market Observatory for
Fisheries and Aquaculture Products

In April 2024 compared to April 2023, of the 16 EU member states, Norway and the United Kingdom, first sales increased only in Cyprus, Finland, Portugal and Spain.

Between weeks 20/2021 to 19/2024 prices of prepared or preserved sardines from Morocco fluctuated, following an increasing trend ranging between 2,25 EUR/kg (week 51/2022) and 6,68 EUR/kg (week 04/2024). Prices in almost half the weeks considered were between 3,00 EUR/kg and 4,00 EUR/kg.

Over the 36-month observation period (May 2021 to April 2024), the weighted average first-sales price of Atlantic herring in Denmark was 0,74 EUR/kg. It was 153% higher than in Estonia (0,29 EUR/kg), and 51% higher than in Sweden (0,49 EUR/kg).

The average monthly consumption of whiting in France shows a decreasing trend when compared to previous years. Consumption was 1.327 tonnes in 2024, 15% and 23% lower than in the same period in 2023 and 2022, respectively.

In 2022, landings of hake in the EU reached 135.270 tonnes at a value of EUR 435 million, with Spain accounting for more than 71% of the total volume.

According to the recently published State of World Fisheries and Aquaculture (SOFIA) 2024, world fisheries and aquaculture production reached 223,2 million tonnes in 2022, a 4,4% increase from 2020, with aquaculture surpassing capture fisheries in aquatic animal production for the first time.



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1. First sales in Europe

During **January–April 2024**, 16 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups¹. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section “*First sales in Europe*” are extracted from EUMOFA².

1.1. January–April 2024 compared to the same period in 2023

Increases in value and volume: Bulgaria and the UK recorded an increase in both first-sales value and volume. In absolute terms, the highest increase was observed in Bulgaria due to sprat, clam and red mullet.

Decreases in value and volume: Belgium, France, Germany, Italy, Lithuania, the Netherlands, Portugal, Spain, Sweden and Norway recorded decreases in first-sales value and volume. Regarding volume the Netherlands stood out with the most significant drops in absolute terms, due to lower first sales of European plaice, shrimp *Crangon* spp. and common sole. Falls in first-sales value in Lithuania were mainly due to falls in first sales of smelt, herring and turbot.

Table 1. **JANUARY-APRIL OVERVIEW OF FIRST SALES FROM THE REPORTING COUNTRIES**
(volume in tonnes and value in million EUR) *

Country	January – April 2022		January – April 2023		January – April 2024		Change from January – April 2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	4.733	27,02	5.695	31,83	4.723	25,70	-17%	-19%
Bulgaria	383	0,33	377	0,22	892	0,52	137%	140%
Cyprus	116	0,77	111	0,79	108	0,81	-2%	2%
Denmark	257.810	137,36	319.879	163,82	302.283	171,16	-6%	4%
Estonia	26.495	6,41	32.215	10,06	30.804	14,89	-4%	48%
Finland	24.318	5,46	28.678	8,07	25.584	9,79	-11%	21%
France	71.190	250,15	67.619	241,43	66.049	220,41	-2%	-9%
Germany	9.214	15,67	16.776	20,17	13.770	16,65	-18%	-17%
Ireland	136.478	151,23	130.266	129,08	129.778	117,85	0%	-9%
Italy	21.975	105,09	22.890	107,48	17.682	84,29	-23%	-22%
Latvia	16.471	3,49	19.748	5,42	18.386	6,38	-7%	18%
Lithuania	640	0,40	134	0,45	83	0,17	-38%	-62%
Netherlands	42.122	55,89	37.481	51,04	4.980	36,66	-87%	-28%
Poland	51.067	12,31	44.238	15,39	35.724	17,24	-19%	12%
Portugal	20.235	85,51	21.564	88,00	18.469	77,10	-14%	-12%
Spain	142.562	476,48	134.525	447,06	126.942	438,24	-6%	-2%
Sweden	74.296	32,34	20.304	17,02	3.949	11,15	-81%	-34%
Norway	1.148.251	1.350,34	1.299.545	1.333,47	1.242.812	1.181,14	-4%	-11%
United Kingdom	106.101	200,11	126.048	212,56	131.566	229,87	4%	8%

Possible discrepancies in % changes are due to rounding.

* Volumes are reported in net weight for EU Member States, and in live weight equivalent (LWE) for Norway. Prices are reported in EUR/kg (without VAT). For Norway, prices are reported in EUR/kg of live weight. Data for Denmark are subject to confidentiality measures, so they may not fully correspond to total first sales in the country.

¹ Small pelagics, other molluscs and aquatic invertebrates, cephalopods, crustaceans, Small pelagics, freshwater fish, Small pelagics, other marine fish, salmonids, small pelagics, tuna and tuna-like species.

² First sales data updated on 18. 6. 2024

1.2. April 2024 compared to April 2023

Increases in value and volume: First sales increased in Cyprus, Finland, Portugal and Spain. In absolute terms the highest increase was observed in Finland, due mainly to herring, sprat and cod.

Decreases in value and volume: First sales decreased in Belgium, Denmark Germany, Ireland, Italy, Latvia, Lithuania, the Netherlands, Poland, Sweden and Norway. The Netherlands and Poland experienced the most significant falls in absolute terms regarding volume and value. The decrease in the Netherlands was mainly due to falls in first sales of common sole, red mullet and lobster *Homarus* spp. and in Poland due to sprat, herring and European flounder.

Table 2. **APRIL OVERVIEW OF FIRST SALES FROM THE REPORTING COUNTRIES**
(volume in tonnes and value in million EUR) *

Country	April 2022		April 2023		April 2024		Change from April 2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.068	7,4	1.159	7,9	796	5,9	-31%	-25%
Bulgaria	285	0,1	294	0,131	284	0,138	-4%	6%
Cyprus	34	0,2	32	0,2	36	0,3	12%	14%
Denmark	74.375	36,3	93.336	44,0	68.231	34,0	-27%	-23%
Estonia	4.620	1,5	8.020	3,0	6.402	3,4	-20%	14%
Finland	4.712	1,1	6.332	1,7	8.457	3,0	34%	76%
France	18.652	61,8	16.440	55,1	15.842	57,2	-4%	4%
Germany	1.967	8,0	5.787	7,0	693	3,6	-88%	-49%
Ireland	14.839	18,8	28.797	19,3	27.166	16,6	-6%	-14%
Italy	6.264	32,3	5.699	28,8	4.369	18,5	-23%	-36%
Latvia	3.963	0,8	5.996	1,6	3.523	1,1	-41%	-29%
Lithuania	178	0,054	37	0,023	34	0,021	-10%	-7%
Netherlands	1.583	10,5	16.800	14,4	1.051	9,0	-94%	-37%
Poland	13.137	3,1	13.403	4,482	1.412	0,9	-89%	-79%
Portugal	5.752	21,4	6.029	22,0	6.497	23,3	8%	6%
Spain	50.349	158,5	39.315	125,4	46.121	146,3	17%	17%
Sweden	7.570	4,9	1.608	3,3	346	2,3	-78%	-29%
Norway	233.829	310,5	262.760	270,3	220.628	196,1	-16%	-27%
United Kingdom	17.764	39,2	21.327	38,8	22.732	38,2	7%	-1%

Possible discrepancies in % changes are due to rounding.

* Volumes are reported in net weight for EU Member States and the UK, and in live weight equivalent (LWE) for Norway. Prices are reported in EUR/kg (without VAT). For Norway, prices are reported in EUR/kg of live weight. Data for Denmark are subject to confidentiality measures, so they may not fully correspond to total first sales in the country.

The most recent weekly first-sales data are available via the EUMOFA website and can be accessed [here](#).
The most recent monthly first-sales data are available via the EUMOFA website and can be accessed [here](#).

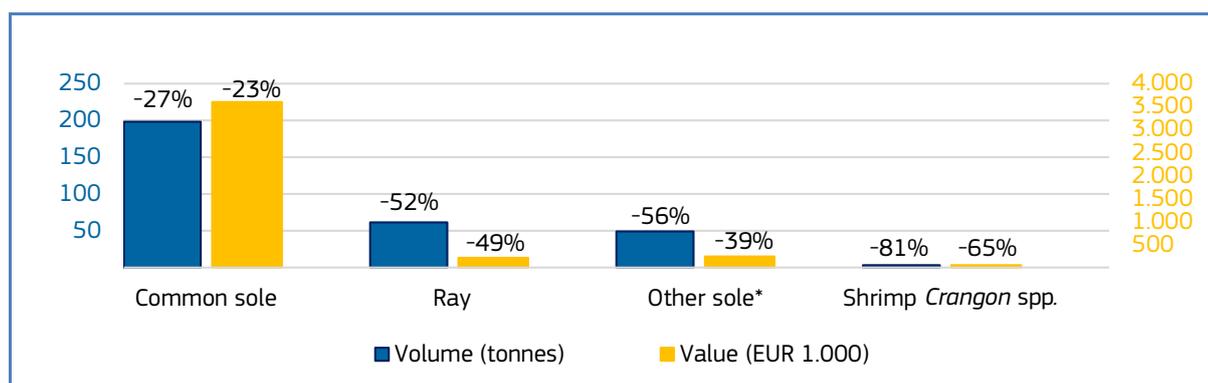
1.3. First sales in selected countries

First sales data analysed in this section are extracted from EUMOFA.³

Table 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM**

 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 25,7 million, -19%	4.723 tonnes, -17%	Common sole, squid, ray, European plaice.
Apr 2024 vs Apr 2023	EUR 5,9 million, -25%	796 tonnes, -31%	Common sole, ray, other sole*, shrimp <i>Crangon</i> spp..

Figure 1. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM, APRIL 2024**

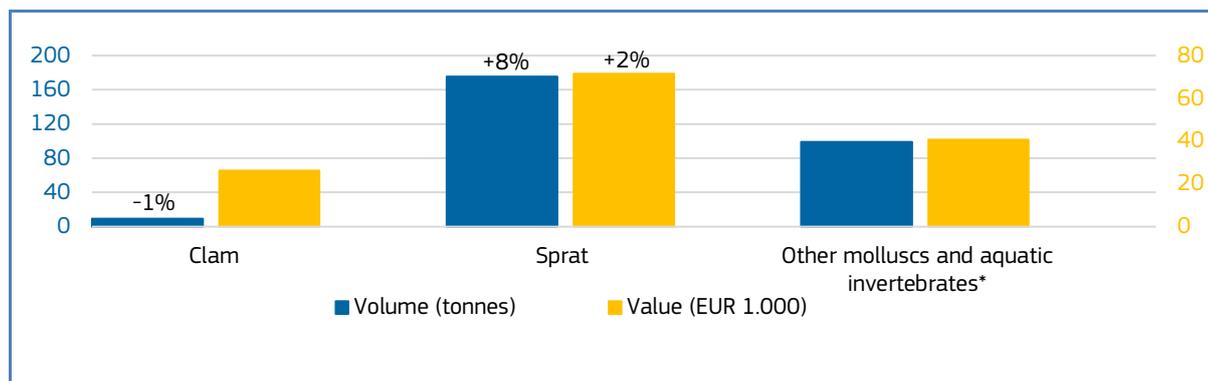


Percentages show change from the previous year. *EUMOFA aggregation for species (see Metadata 2, Annex 3: <https://eumofa.eu/supply-balance-and-other-methodologies>).

Table 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA**

 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 0,5 million, +140%	892 tonnes, +137%	Sprat, clam, red mullet.
Apr 2024 vs Apr 2023	EUR 0,1 million, +6%	9 tonnes, -1%	Clam, sprat, other molluscs and aquatic invertebrates*.

Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA, APRIL 2024**



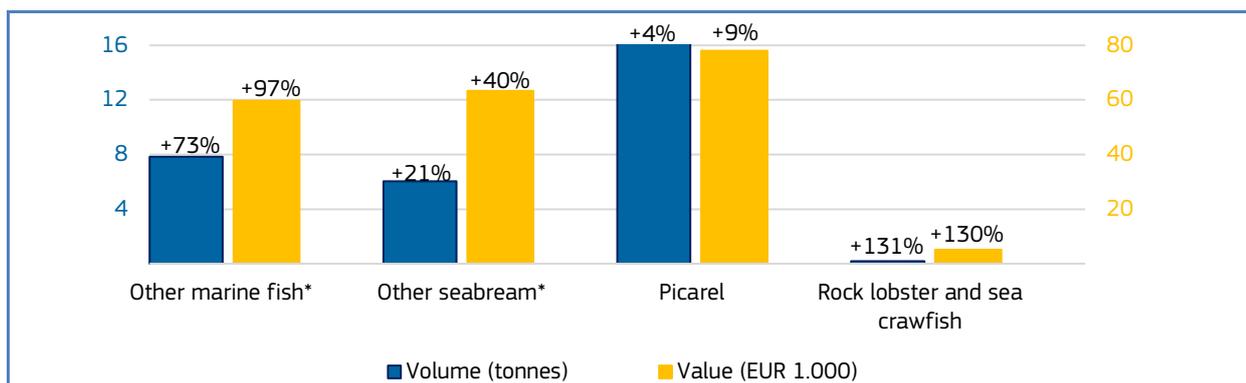
Percentages show change from the previous year. *EUMOFA aggregation for species.

³ First-sales data updated on 18. 6. 2024.

Table 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS**

 Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Apr 2024 vs Jan-Apr 2023	EUR 0,8 million, +2%	108 tonnes, -2%	Value: other seabream*, other marine fish*, hake. Volume: picarel, squid, cuttlefish, sardine.	In April 2024, there was a moderate increase in first sales of rock lobster and sea crawfish compared to April 2023. The category "rock lobster and sea crawfish" is primarily composed of <i>Marsupenaeus japonicus</i> (commonly known as the kuruma prawn or Japanese tiger prawn), an Indo-West Pacific species reported for the first time in Cyprus in 1986 ⁴ . In recent years, the artisanal fishery targeting this species has developed in Cyprus, using set nets. The increase observed between April 2023 and April 2024 can be attributed to several factors: 1) Environmental conditions: changes in sea temperatures can influence the distribution and abundance of marine species; 2) Advanced fishing techniques: improved gear, vessels and navigation systems allow fishers to locate and harvest prawns more effectively. There may have been an increase in the number of fishing trips or the number of fishers targeting <i>Marsupenaeus japonicus</i> , leading to higher overall catches. 3) Market demand: a surge in market demand for <i>Marsupenaeus japonicus</i> could have incentivised fishers to target this species more intensively. It is likely that a combination of these factors, rather than a single cause, contributed to the observed increase.
Apr 2024 vs Apr 2023	EUR 0,3 million, +14%	36 tonnes, +12%	Other marine fish*, other seabream*, picarel, rock lobster and sea crawfish.	

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS, APRIL 2024**



Percentages show change from the previous year. *EUMOFA aggregation for species.

⁴ Lewinsohn, Ch. & L. B. Holthuis: The Crustacea Decapoda of Cyprus. Zool. Verh. Leiden 230, 12-V-1986: 1-64, fig. 1. — ISSN 0024-1652. Available: https://www.researchgate.net/figure/The-Kuruma-shrimp-Penaeus-japonicus-obtained-from-The-Gulf-of-Suez-and-Bitter-Lakes_fig1_354370536

Table 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK**

 Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 171,2 million, +4%	302.283 tonnes, -6%	Value: herring, mackerel, blue whiting sprat. Volume: other groundfish*, sprat, mussel <i>Mytilus</i> spp., clam.
Apr 2024 vs Apr 2023	EUR 34,0 million, -23%	68.231 tonnes, -27%	Other groundfish*, Norway lobster, sprat, saithe.

Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, APRIL 2024**

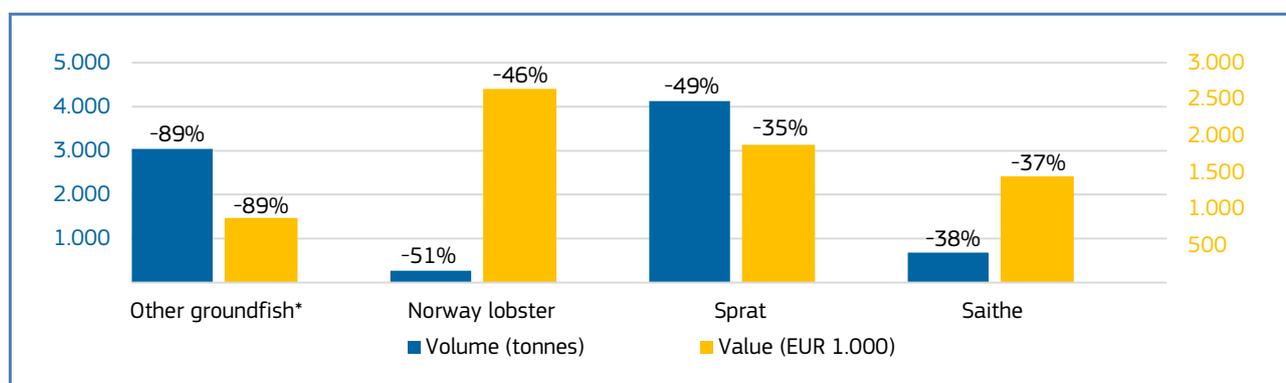
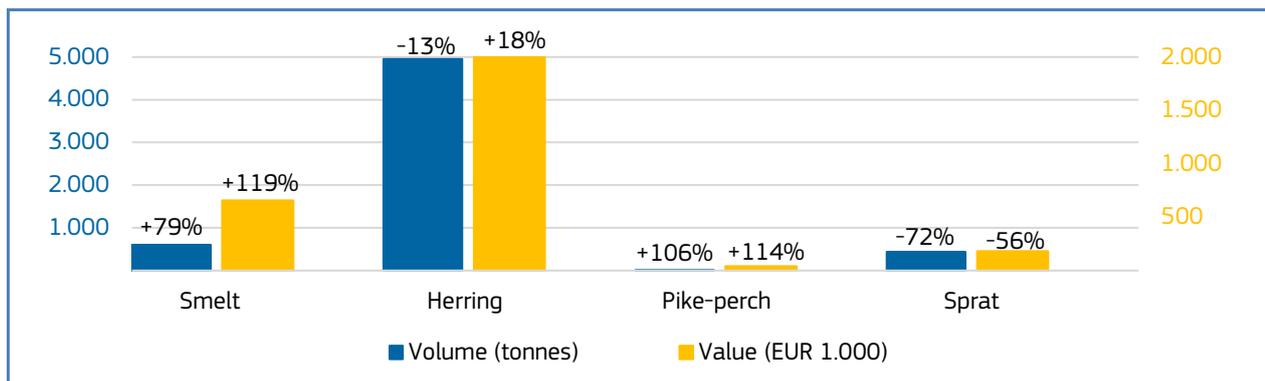


Table 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA**

 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Apr 2024 vs Jan-Apr 2023	EUR 14,9 million, +48%	30.804 tonnes, -4%	Value: sprat, herring, pike-perch, smelt. Volume: herring, other freshwater fish*, European flounder, pike.	<p>In April 2024, there was a high increase in first sales of pike-perch compared to April 2023. Pike-perch is a freshwater species and the largest supply is from inland freshwaters. Pike-perch is not covered by TAC and catches are not regulated. Existing resources in fishing capacity, weather conditions and fish stock availability allowed an increase in the volume of landings in April 2024 compared to April 2023.</p> <p>In April 2024, there was a moderate increase in first sales of smelt compared to April 2023. Supply comes mostly from the Gulf of Riga. Smelt is not covered by TAC and catches are not regulated. Water temperature and wind direction are the determining factors for fishing smelt. In April 2023, wind direction and other conditions were not favourable for smelt coming to the coastal areas. Smelt catches were higher in April 2024 than April 2023. Despite an increasing supply of smelt, the price increased by 22%. That might indicate that market demand was higher than supply.</p>
Apr 2024 vs Apr 2023	EUR 3,4 million, +14%	6.402 tonnes, -20%	Value: smelt, herring, pike-perch, Volume: sprat, herring, other freshwater fish*.	

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, APRIL 2024**

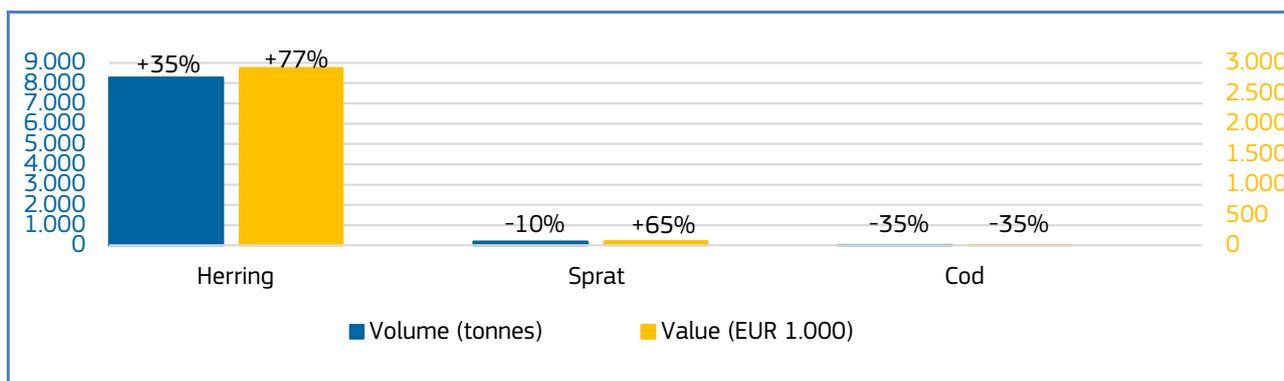


Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FINLAND**

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 9,8 million, +21%	25.584 tonnes, -11%	Value: Herring, sprat. Volume: herring sprat.
Apr 2024 vs Apr 2023	EUR 3,0 million, +76%	8.457 tonnes, +34%	Herring, sprat, cod.

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FINLAND, APRIL 2024**



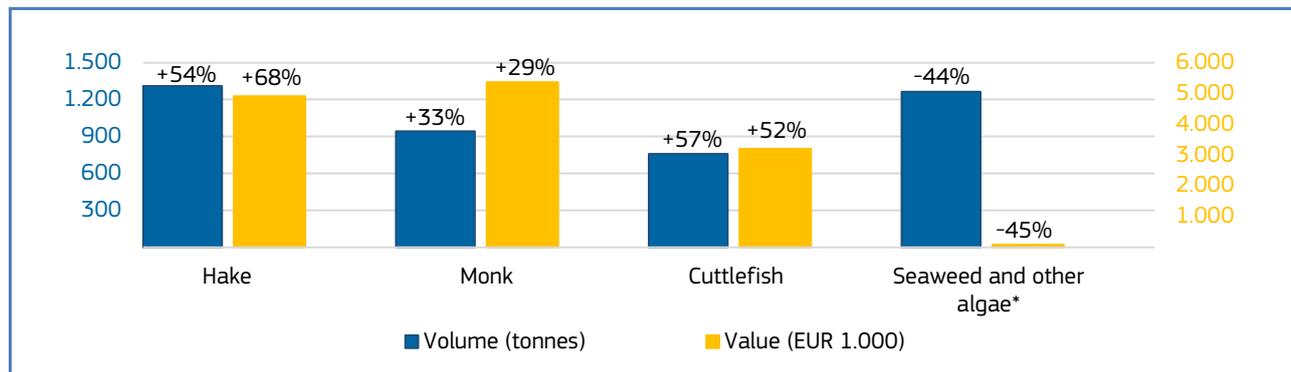
Percentages show change from the previous year.

Table 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE**

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Apr 2024 vs Jan-Apr 2023	EUR 220,4 million, -12%	66.049 tonnes, -2%	Squid, eel, blue whiting, scallop.	In April 2024, there was a significant decrease in first sales volume of blue whiting compared to April 2023, from 857 tonnes to zero, which meant an economic drop from EUR 1,9 million to zero. A similar event already took place in 2020. The 2024 TACs recommendation for the blue whiting is 12,5% higher compared to that for 2023. ICES advised that blue whiting catches in 2024 should not exceed 1.529.754 tonnes, although for years it has been caught above established limits, which may affect recruitment and
Apr 2024 vs Apr 2023	EUR 57,2 million, +4%	15.842 tonnes, -4%	Value: hake, monk, cuttlefish, common sole. Volume: seaweed and other algae, blue whiting, cod, mackerel.	

catches⁵. The lack of first sale in France may be due to a diversion of blue whiting landings to the Netherlands⁶

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, APRIL 2024**

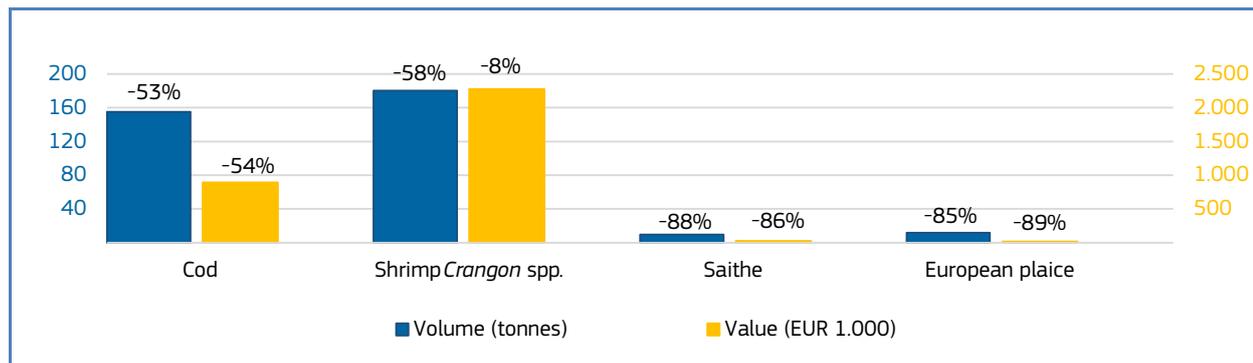


Percentages show change from the previous year.

Table 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY**

 Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 16,7 million, -17%	13,770 tonnes, -18%	Shrimp <i>Crangon</i> spp., Greenland halibut, mackerel, European plaice.
Apr 2024 vs Apr 2023	EUR 3,6 million, -49%	693 tonnes, -88%	Cod, shrimp <i>Crangon</i> spp., saithe, European plaice.

Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY, APRIL 2024**



Percentages show change from the previous year.

⁵ ICES. 2023. Blue whiting (*Micromesistius poutassou*) in subareas 1-9, 12, and 14 (Northeast Atlantic and adjacent waters). In Report of the ICES Advisory Committee, 2023. ICES Advice 2023, whb.27.1-91214. <https://doi.org/10.17895/ices.advice.21856554>

⁶ <https://lemarin.ouest-france.fr/peche/chalutier-geant-a-saint-malo-notre-avenir-est-suspendu-a-la-decision-de-letat-sur-les-quotas-2e53d620-db07-11ee-a79f-2312009be08f>

Table 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN IRELAND**

 Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 117,9 million, -9%	129.778 tonnes, 0%	Mackerel, monk, Norway lobster, blue whiting.
Apr 2024 vs Apr 2023	EUR 16,6 million, -14%	27.166 tonnes, -6%	Monk, Lobster <i>Homarus</i> spp., hake, other molluscs and aquatic invertebrates*.

Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN IRELAND, APRIL 2024**

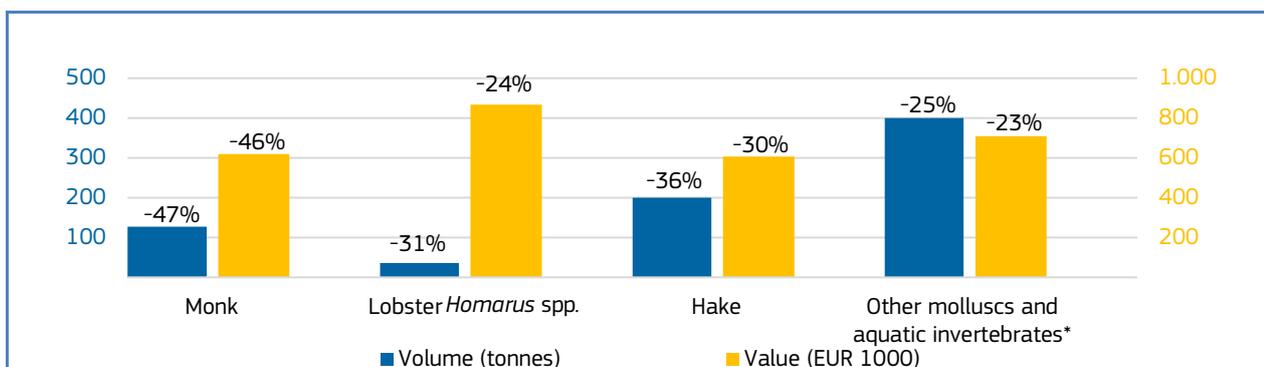
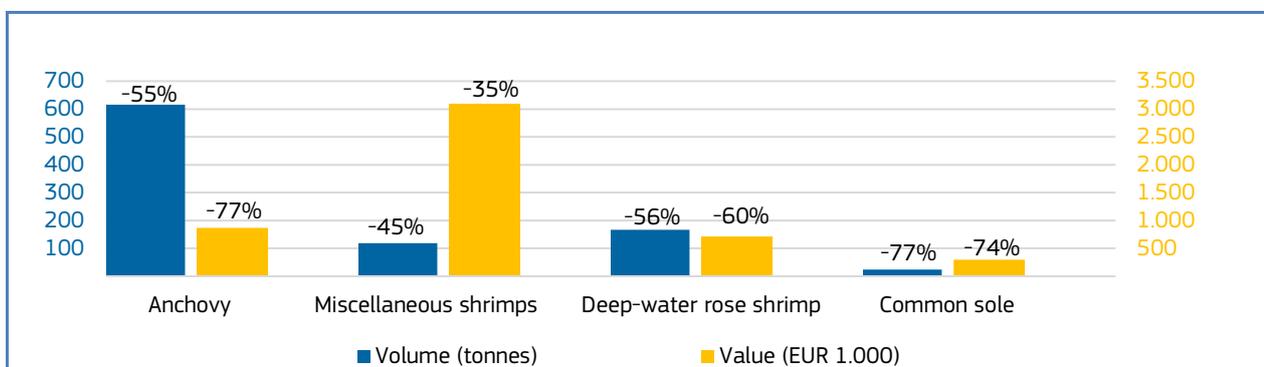


Table 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY**

 Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 84,3 million, -22%	17.682 tonnes, -23%	Hake, clam, deep-water rose shrimps, anchovy.
Apr 2024 vs Apr 2023	EUR 18,5 million, -36%	4.369 tonnes, -23%	Anchovy, miscellaneous shrimps, deep-water rose shrimps, common sole.

Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, APRIL 2024**

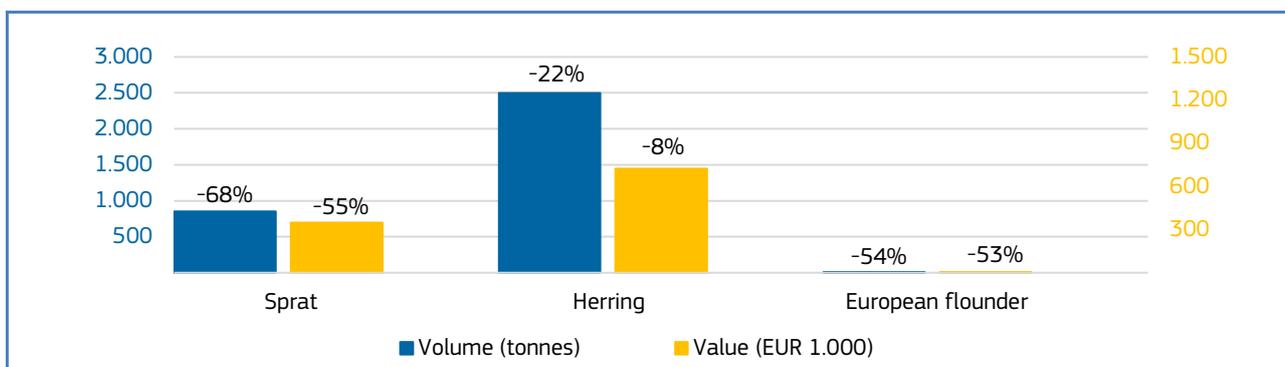


Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 13. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA

 Latvia	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 6,4 million, +18%	18.386 tonnes, -7%	Value: sprat, herring, other groundfish*. Volume: herring, sprat, smelt.
Apr 2024 vs Apr 2023	1,1 million, -29%	3.523 tonnes, -41%	Sprat, herring, European flounder.

Figure 11. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, APRIL 2024

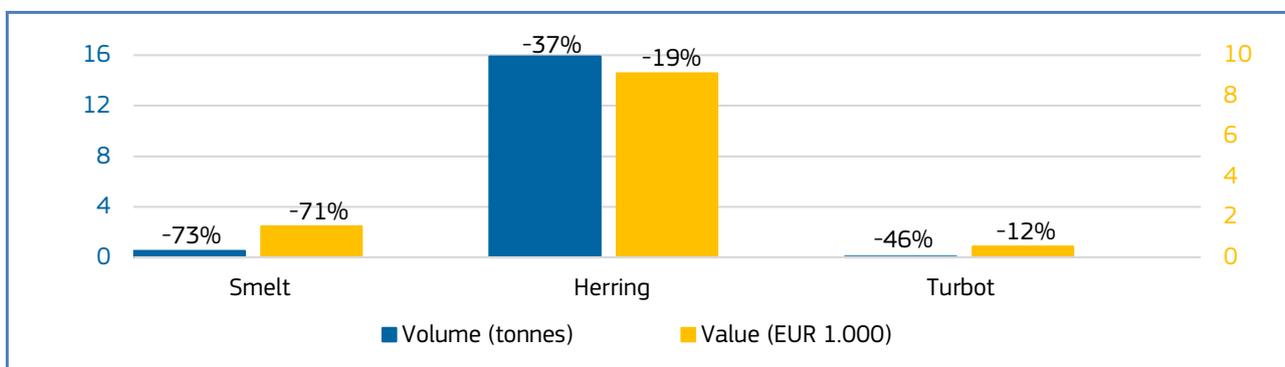


Percentages show change from the previous year. *EUMOFA aggregation for species

Table 14. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA

 Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 0,2 million, -62%	82 tonnes, -38%	Smelt, herring, turbot.
Apr 2024 vs Apr 2023	EUR 0,02 million, -7%	34 tonnes, -10%	Smelt, herring, turbot.

Figure 12. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, APRIL 2024

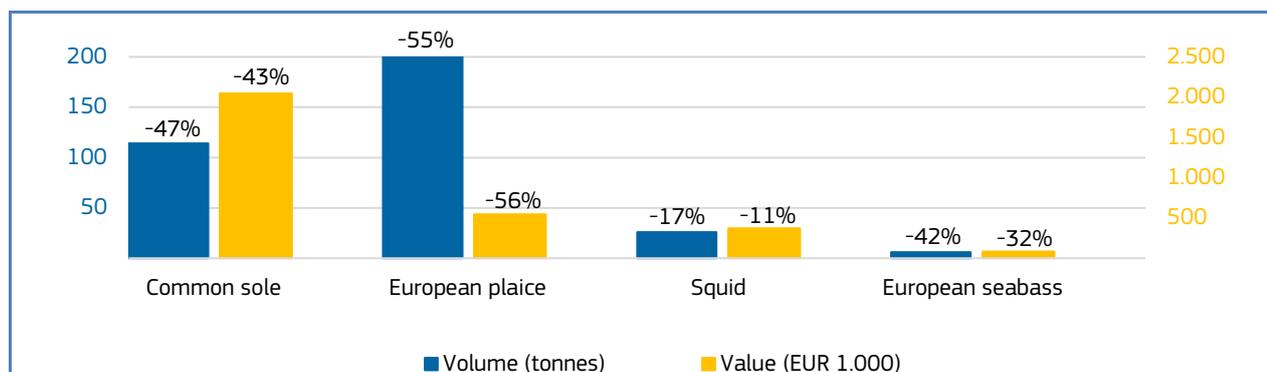


Percentages show change from the previous year.

Table 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS**

 the Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Apr 2024 vs Jan-Apr 2023	EUR 36,7 million, -28%	4.980 tonnes, -87%	Common sole, European plaice, turbot, Norway lobster.	In April 2024, there was a significant decrease in first sales compared to April 2023. In the Netherlands, total production dropped from 16.800 tonnes in April 2023 to 1.050 tonnes in April 2024. This is mostly explained by the drop in landings of blue whiting, from around 15.400 tonnes in April 2023 to zero in April 2024. This development seems to be mostly explained by a statistical artifact, with no data reported for the Dutch fleet, while other fishing nations were reporting fishing activity. In October 2023, the coastal states agreed to a TAC of 1,5 million tonnes for the blue whiting 2024 fishing season, which is a 13% increase compared to the TAC advice for the 2023. The state of the stock is considered to be rather good ⁷ . An increase was also observed in landings of brown shrimp (<i>Crangon crangon</i>) from EUR 2,1 million to EUR 4,5 million. The North Sea brown shrimp stock has shown a tendency to recover quickly from periods of lower abundance ⁸ .
Apr 2024 vs Apr 2023	EUR 9,0 million, -37%	1.051 tonnes, -94%	Common sole, red mullet, lobster <i>Homarus</i> spp., European flounder.	

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, APRIL 2024**



Percentages show change from the previous year.

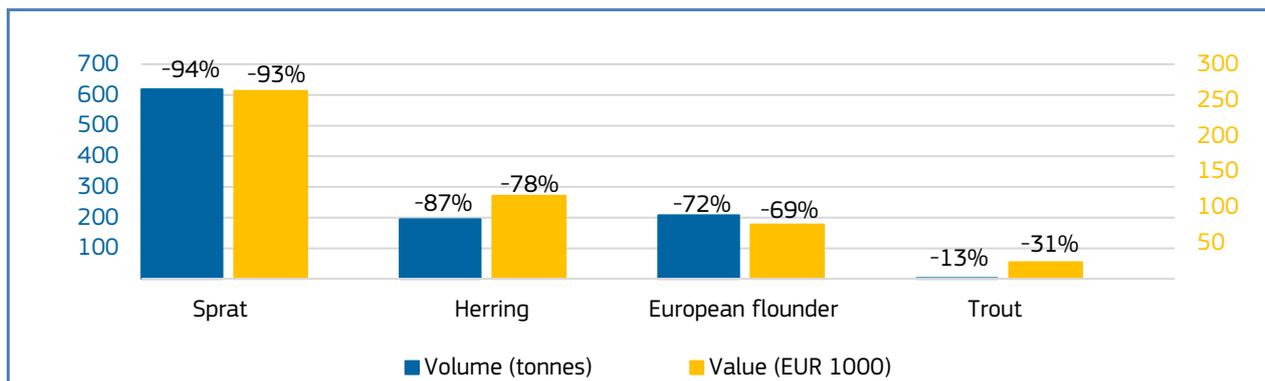
Table 16. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND**

 Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 17,2 million, +12%	35.724 tonnes, -19%	Value: sprat, other freshwater fish*, pike-perch, eel. Volume: sprat, herring, European flounder, European plaice.
Apr 2024 vs Apr 2023	EUR 0,9 million, -79%	1.412 tonnes, -89%	Sprat, herring, European flounder, trout.

⁷ ICES Advice 2023 – whb.27.1-91214 – <https://doi.org/10.17895/ices.advice.21856554>

⁸ Gunther et al. 2022; Addison et al. 2023 - https://www.fishsource.org/stock_page/1207

Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, APRIL 2024**

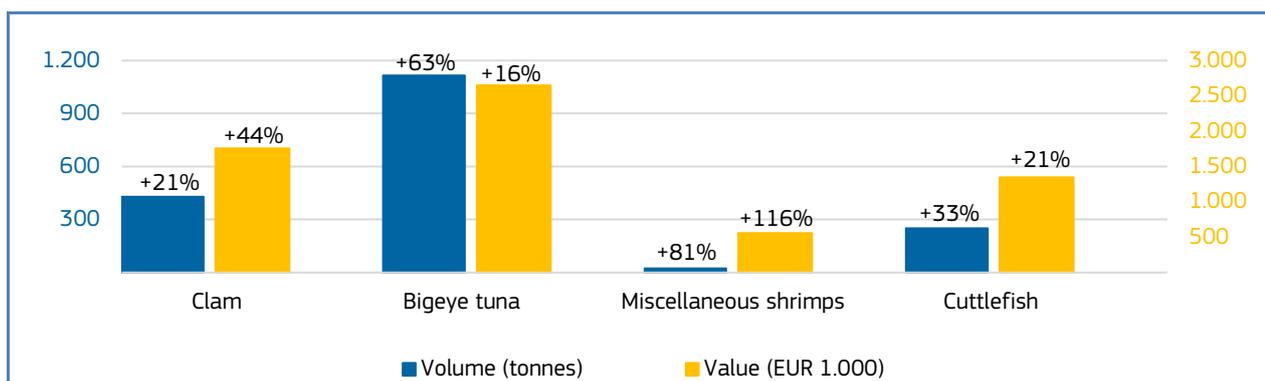


Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 17. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL**

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Apr 2024 vs Jan-Apr 2023	EUR 77,1 million, -12%	18.469 tonnes, -14%	Octopus, anchovy, Atlantic horse mackerel, blue whiting.	In April 2024, there was a significant increase in first sales of miscellaneous shrimps compared to April 2023. The increase was mainly due to blue and red shrimp, with a 76% increase in volume (kg) and 184% increase in value. The increase in catches could be influenced by environmental factors and the abundance of food, which affect recruitment.
Apr 2024 vs Apr 2023	EUR 23,3 million, +6%	6.497 tonnes, +8%	Clam, bigeye tuna, miscellaneous shrimps, cuttlefish.	

Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, APRIL 2024**



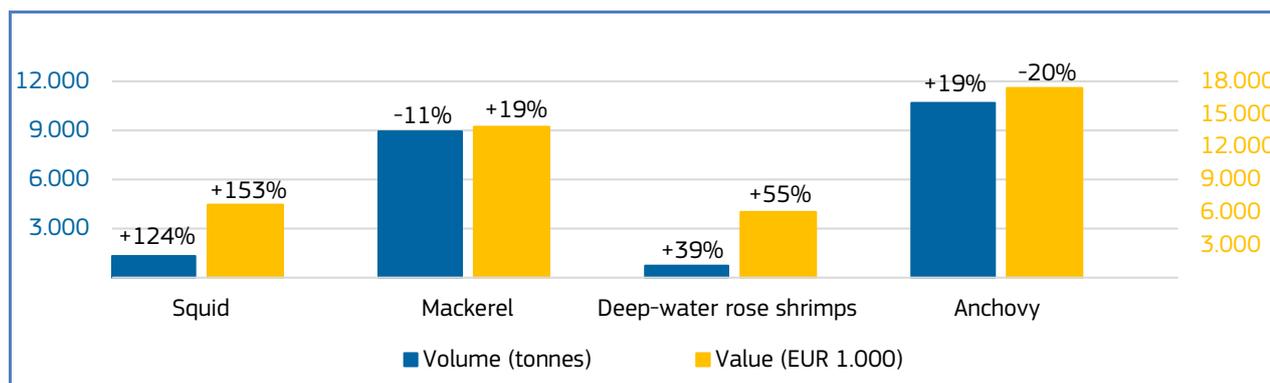
Percentages show change from the previous year.

Table 18. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN**

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Apr 2024 vs Jan-Apr 2023	EUR 438,2 million, -2%	126.942 tonnes, -6%	Clam, anchovy, cod, hake.	In April 2024, there was a significant increase in first sales of squid compared to April 2023. The increase was mainly due to Argentine squid and Patagonian squid, with an increase in first-sales volume of 241% and 2.410%, respectively. Catches of Argentine squid fluctuate enormously from one year to the next, possibly due to environmental conditions during the initial
Apr 2024 vs Apr 2023	EUR 146,3 million, +17%	46.121 tonnes, +17%	Squid, mackerel, deep-water rose shrimps, anchovy.	

				<p>stages of its development. It is a species with a short life cycle with a single reproductive episode before death, and with a great capacity for recovery after being overexploited. The latest evaluation reports of this species show a higher biomass than expected, which results in higher catches for vessels that catch this species and land it in Spain⁹. The fleet also benefits from catches of Patagonian squid, which is currently showing an increase in biomass, which translates into higher catches. Due to the greater abundance of both species, they are becoming a common catch of the bottom trawling fleet.</p>
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Figure 16. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, APRIL 2024**



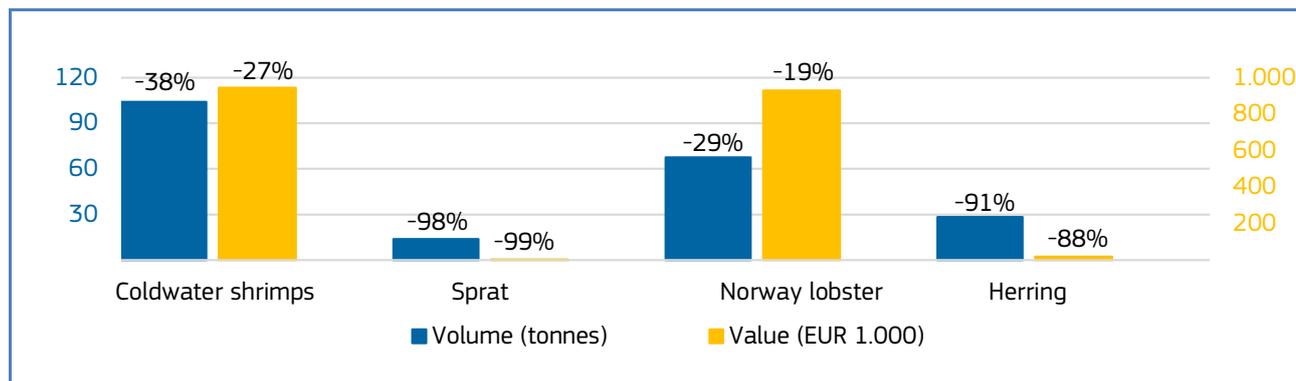
Percentages show change from the previous year.

Table 19. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN**

 Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Apr 2024 vs Jan-Apr 2023	EUR 11,5 million, -34%	3.949 tonnes, -81%	Sprat, herring, Norway lobster, saithe.	<p>In April 2024, there was a moderate decrease in first sales of sprat compared to April 2023. Sprat sales in April 2024 were only 3% of total Swedish fleet catches of sprat, whereas in April 2023 they were around 50%. When comparing April 2024 with April 2023 catches, it was observed that in Sweden catches in April 2024 were 77% lower, while sales were 98% lower. It was also observed that the price decreased by 15%, which might indicate that market demand was satisfied. It might seem that market demand of sprat was lower than usual in April and suppliers chose markets in other countries.</p> <p>There was a moderate decrease in first sales of herring compared to April 2023. Herring sales in April 2024 were only 1% of total Swedish fleet catches of herring, whereas in April 2023 they were 12% of total Swedish fleet catches. One reason for the decreasing sales is the 38% reduction in total allowed catches of herring in the Baltic Sea when comparing 2024 to 2023. It was observed that catches in April 2024 were 15% lower, while sales were 91% lower. In April 2024, a lack of supply and sales for human consumption, which was a large part of the quantity sold, led to a 24% increase in price when comparing April 2024 with April 2023.</p>
Apr 2024 vs Apr 2023	EUR 2,3 million, -29%	346 tonnes, -78%	Coldwater shrimps, sprat, Norway lobster, herring.	

⁹ <https://pescare.com.ar/el-inidep-informo-sobre-la-situacion-del-calamar-illex-argentino-elevada-abundancia-y-optimismo-por-una-excelente-zafra-2024/>

Figure 17. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, APRIL 2024**

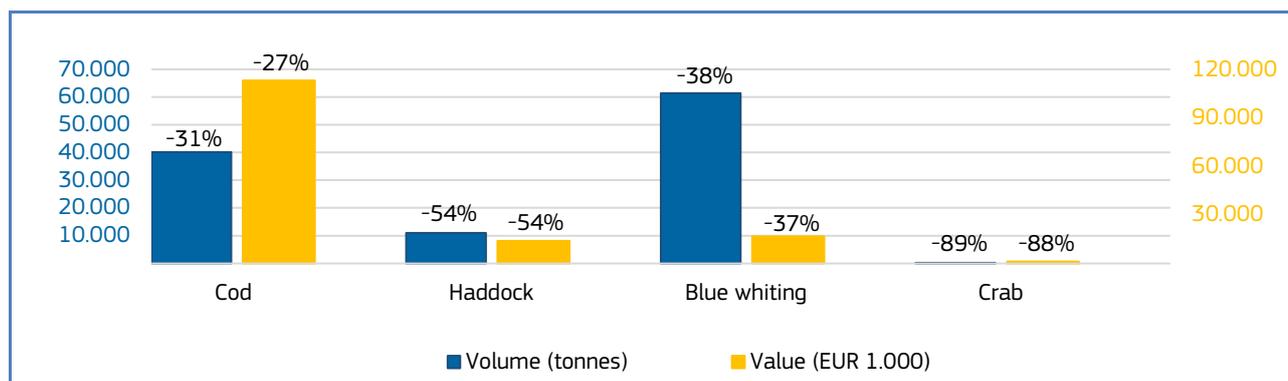


Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 20. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY**

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 1.181,1 million, -11%	1.242.812 tonnes, -4%	Cod, herring, saithe, crab.
Apr 2024 vs Apr 2023	EUR 196,1 million, -27%	220.628 tonnes, -1'6%	Cod, haddock, blue whiting, crab.

Figure 18. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, APRIL 2024**

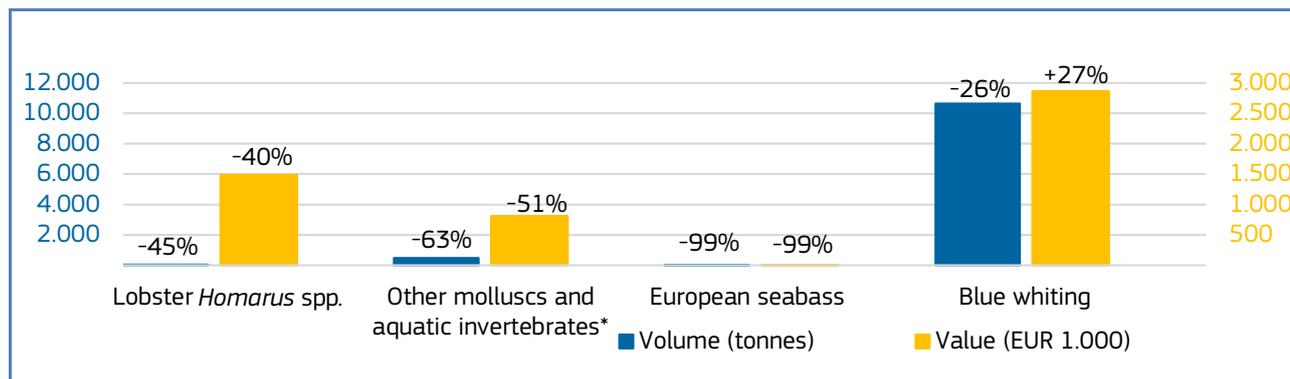


Percentages show change from the previous year.

Table 21. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM**

The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2024 vs Jan-Apr 2023	EUR 229,9 million, +8%	131.566 tonnes, +4%	Mackerel, blue whiting, cod, haddock.
Apr 2024 vs Apr 2023	EUR 38,2 million, -1%	22.732 tonnes, +7%	Value: lobster <i>Homarus</i> spp., other molluscs and aquatic invertebrates*, scallop, European seabass. Volume: blue whiting, mackerel, haddock, cod.

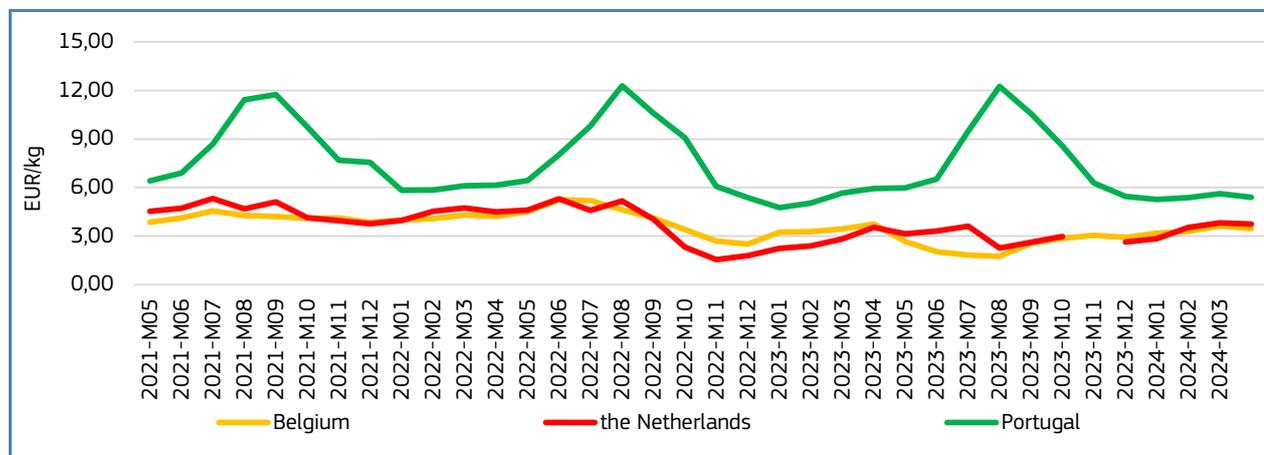
Figure 19. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, APRIL 2024**



Percentages show change from the previous year.

1.4. Comparison of first sales prices of selected species in selected countries¹⁰

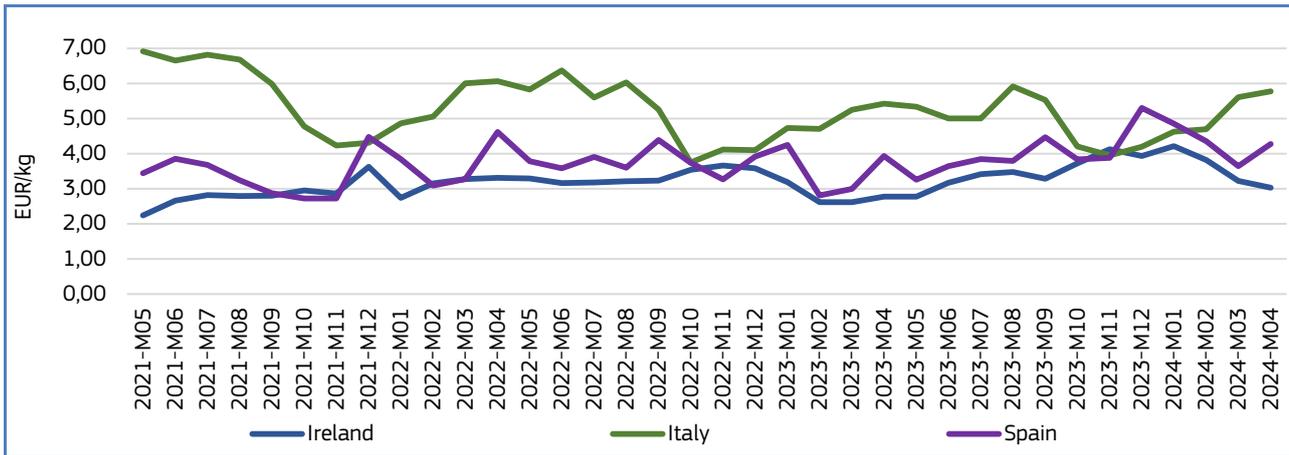
Figure 20. **FIRST SALES PRICES OF CUTTLEFISH IN BELGIUM, THE NETHERLANDS AND PORTUGAL**



EU first sales of **cuttlefish** occur in several countries including **Belgium**, the **Netherlands** and **Portugal**. In April 2024, average first sales prices of cuttlefish were 3,46 EUR/kg in Belgium (down by 5% from the previous month and down by 7% from the previous year), 3,74 EUR/kg in the Netherlands (down by 2% from March 2024 and up by 6% from April 2023), and 5,39 EUR/kg in Portugal (down by 4% from the previous month and up by 9% from the previous year). In April 2024, supply relative to the previous year increased in the Netherlands (+15%) and Portugal (+33%), while it decreased in Belgium (-18%). In the three countries analysed supply is seasonal and seems to peak between January and February in Belgium, November–December in Portugal, and in March–April in Portugal. Between months 05/2021 to 04/2024, prices fluctuated strongly and decreased in the three markets analysed with peaks which seem to occur in August–September in Portugal and June–July in the Netherlands. Drops in prices in the Netherlands occur in November–December, in December in Belgium and in January–February in Portugal.

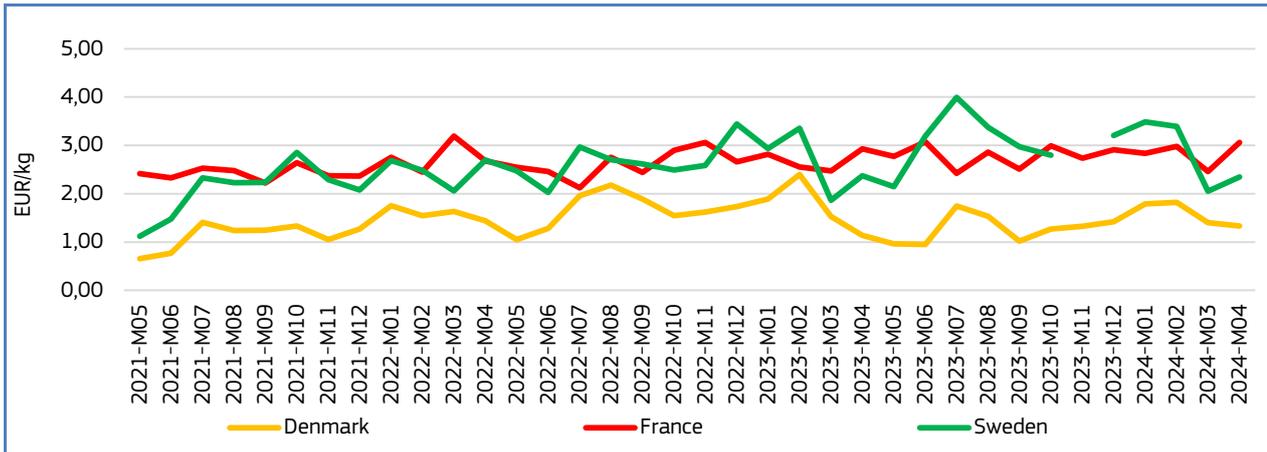
¹⁰ First sales data updated on 17. 6. 2024.

Figure 21. **FIRST SALES PRICES OF HAKE IN IRELAND, ITALY AND SPAIN**



EU first sales of **hake** occur in **Ireland, Italy** and **Spain** as well as in several other member states. In April 2024, average first-sales prices of hake were: 3,03 EUR/kg in Ireland (down by 6% from previous month and by 9% from April 2023), 5,77 EUR/kg in Italy (up by 3% from March 2024 and by 6% from April 2023), and 4,28 EUR/kg in Spain (up by 17% from the previous month and by 9% from the previous year). In April 2024, supply increased in Spain (+3%), while it decreased in Italy (-33%) and in Ireland (-36%). Supply fluctuates strongly in the three countries analysed. In Ireland supply seems to peak between February-March and July. In Italy supply peaks between October and February, while in Spain it seems to peak between September and November. Between months 05/2021 to 04/2024, prices fluctuated and have been increasing in Spain, while they decreased in Italy. In Italy seasonal drops in prices seem to occur between October and November. The highest price of 4,21 EUR/kg in Ireland was recorded in January 2024.

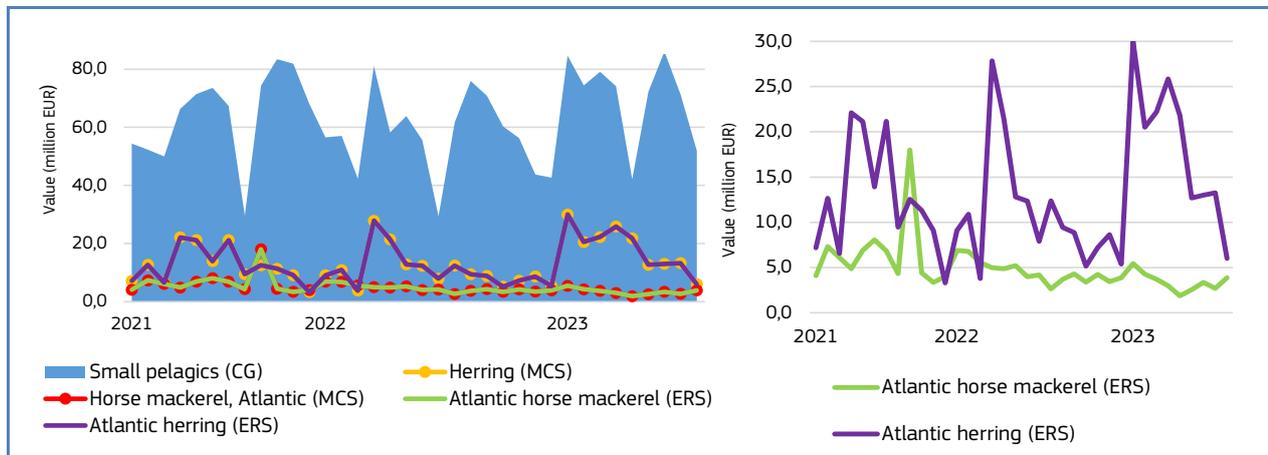
Figure 22. **FIRST SALES PRICES OF HADDOCK IN DENMARK, FRANCE AND SWEDEN**



EU first sales of **haddock** occur in several countries as well as in **Denmark, France** and **Sweden**. In April 2024, the average first-sales prices of haddock were 1,33 EUR/kg in Denmark (down by 5% from the previous month and up by 17% from the previous year), 3,06 EUR/kg in France (up by 24% from the previous month and by 4% from April 2023), and 2,34 EUR/kg in Sweden (up by 14% from March 2024 and down 1% from the previous year). In April 2024, supply decreased in Denmark (-8%), France (-35%), while it increased in Sweden (+35%), relative to the previous year. The highest peaks in Denmark occur in May and between August and October, June-July in France, May-June and September-October in Sweden. Between months 05/2021 to 04/2024, prices increased in the three markets analysed. In Denmark seasonal drops in prices seem to occur in May-June and between September-November. The highest price of 3,99 EUR/kg was registered in July 2023 in Sweden.

1.5. Commodity group of the month: Small pelagics¹¹

Figure 23. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES¹², MAY 2021 – APRIL 2024**



In April 2024, the “**small pelagics**” commodity group (CG¹³) recorded the 3rd highest first-sales in value and 2nd in volume out of the 10 CGs in the countries monitored by EUMOFA.¹⁴ In the reporting countries covered by the EUMOFA database, first sales of this group of species in April 2024 totalled EUR 51,9 million and 51.685 tonnes, representing a 14% decrease in value and 27% decrease in volume compared to April 2023. In the past 36 months, the highest first-sales value of small pelagics was registered in February 2024 at about EUR 86,1 million.

The “small pelagics” commodity group includes seven Main Commercial Species (MCS): anchovy, herring, Atlantic horse mackerel, mackerel, sardine, sprat, and miscellaneous small pelagics¹⁵. At the Electronic Recording and Reporting System (ERS) level Atlantic horse mackerel (7%) and Atlantic herring (12%) together accounted for 91% of the total first-sales value for “small pelagics” recorded in April 2024.

1.6. Focus on Atlantic herring



Atlantic herring (*Clupea harengus*) is economically the most important herring species in the family Clupeidae. It is widely distributed in the Northwest and Northeast Atlantic and congregates in large schools, migrating between spawning and wintering grounds in coastal areas, and feeding grounds in open waters. Atlantic herring can live for up to 10 years and reach 40 cm in length (average size is 20–30 cm) and almost 700 g in weight. They are demersal spawners, depositing their sticky eggs on coarse sand, gravel, shells and small stones at depths of 15–40 m. Herring is an important prey species for many predators, including cod, dogfish and other sharks, marine mammals, and seabirds¹⁶.

Atlantic herring is mainly caught by pelagic trawlers (mid-water, pair and otter) and purse seiners. The main stocks fished in EU waters are found in the Baltic Sea, the North Sea, and west of Scotland. Herring catches are seasonal and subject to total allowable catches (TACs) based on precautionary considerations. Gear restrictions and a minimum conservation reference size limit (20 cm) are also in place in EU waters¹⁷. In Norway there is a minimum size between 20 and 25 cm¹⁸ for herring. The North Sea Atlantic herring fisheries are managed jointly through a trilateral agreement between the EU, Norway, and the United Kingdom. This agreement involves long-term management plans which are based on a catch quota system, set annually¹⁹. On the market, herring is sold mainly whole, fresh, marinated and smoked.

¹¹ First sales data updated on 24. 6. 2024.

¹² Norway, the Faroe Islands and the UK excluded from the analyses.

¹³ Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

¹⁴ More data on commodity groups can be found in Table 1.2 of the Annex.

¹⁵ Greater Argentine accounts for the highest first-sales value and volume within the miscellaneous small pelagics category.

¹⁶ <https://www.ices.dk/about-ICES/projects/EU-RFP/EU%20Repository/ICES%20FishMap/ICES%20FishMap%20species%20factsheet-herring.pdf>

¹⁷ Regulation (EU) 2019/1241 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02019R1241-20220101>

¹⁸ <https://lovdata.no/dokument/LTI/forskrift/2021-12-23-3910>

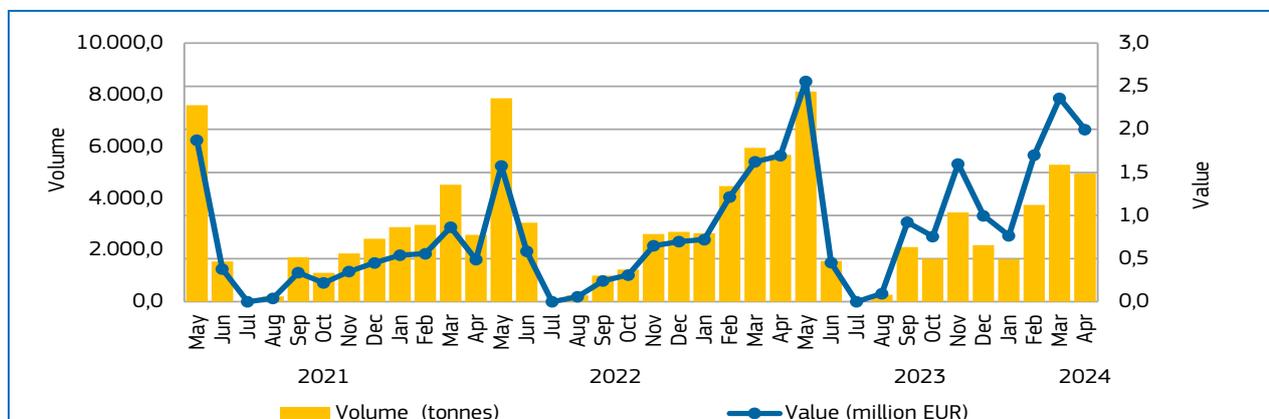
¹⁹ https://oceans-and-fisheries.ec.europa.eu/news/eu-reaches-agreements-norway-and-uk-and-bilaterally-norway-fishing-opportunities-and-access-waters-2023-12-08_en

Selected countries

Table 22. **COMPARISON OF ATLANTIC HERRING FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF “SMALL PELAGICS” IN SELECTED COUNTRIES**

Atlantic herring		Changes in Atlantic herring first sales Jan-Apr 2024 (%)		Contribution of Atlantic herring to total “small pelagics” first sales in April 2024 (%)	Principal places of sale in Apr 2024 in terms of first-sales value
		Compared to Jan-Apr 2023	Compared to Jan-Apr 2022		
Estonia	Value	+56%	+21%	92%	Paldiski Lõunasadam, Haapsalu, Lemmetsa.
	Volume	-3%	-20%	92%	
Denmark	Value	+30%	+178%	10%	NA
	Volume	-17%	+21%	8%	
Sweden	Value	-63%	-83%	69%	Göteborg.
	Volume	-79%	-92%	67%	

Figure 24. **ATLANTIC HERRING: FIRST SALES IN ESTONIA, MAY 2021 – APRIL 2024**



Over the past 36 months in **Estonia**, the highest first-sales value and volume of Atlantic herring were in May 2023 when approximately 8.128 tonnes were sold for EUR 2,6 million.

Figure 25. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN ESTONIA IN VALUE AND VOLUME, APRIL 2024**

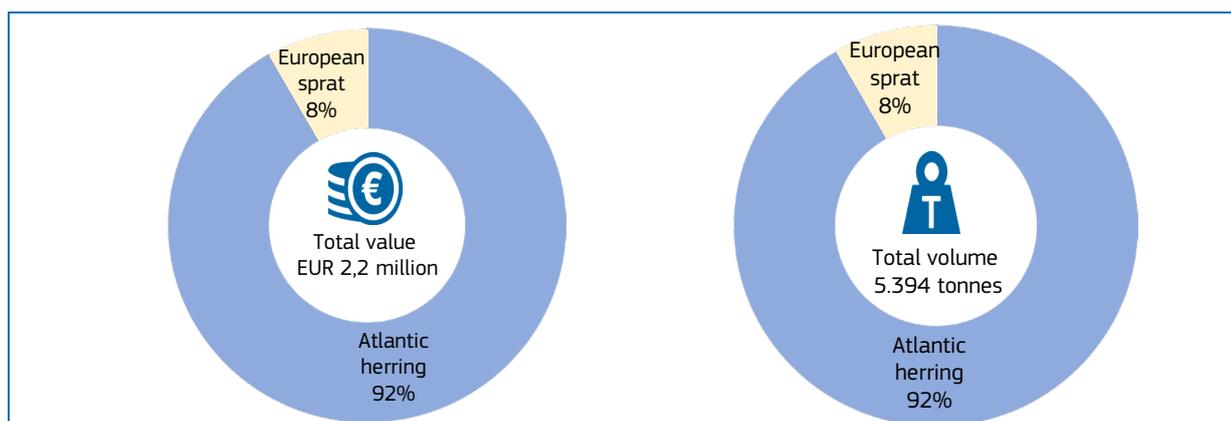
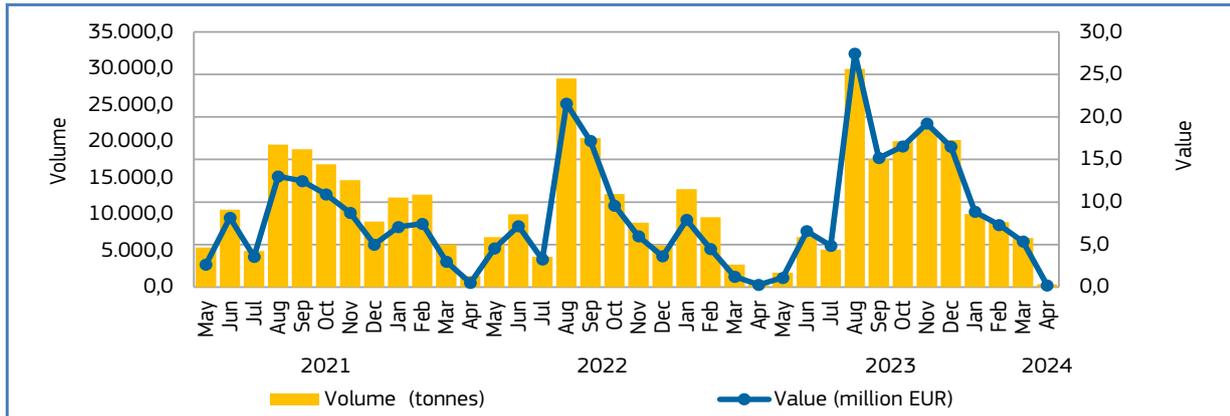


Figure 26. ATLANTIC HERRING: FIRST SALES IN THE DENMARK, MAY 2021 – APRIL 2024



Over the past 36 months in **Denmark**, the highest first-sales value and volume of Atlantic herring was in August 2023 when 29.917 tonnes were sold for EUR 27,5 million.

Figure 27. FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN DENMARK IN VALUE AND VOLUME, APRIL 2024

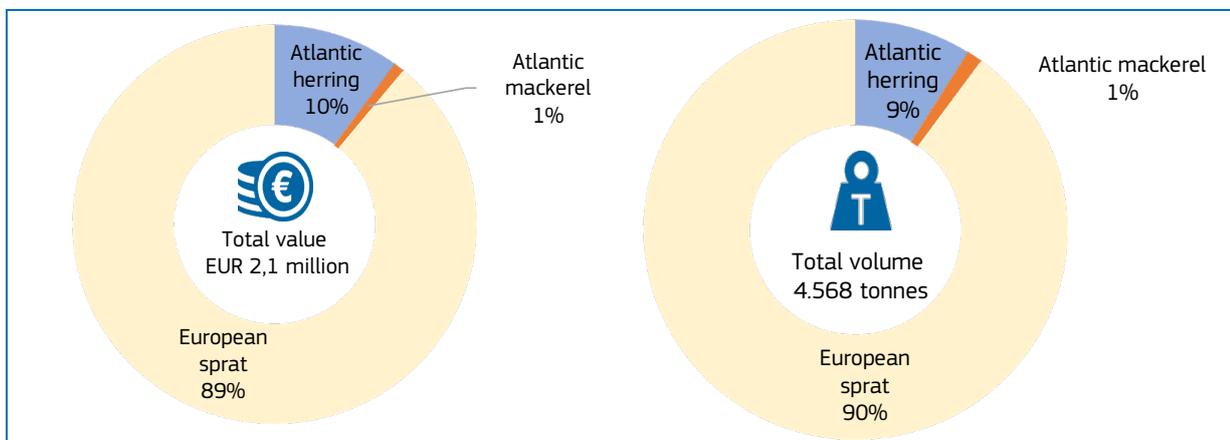
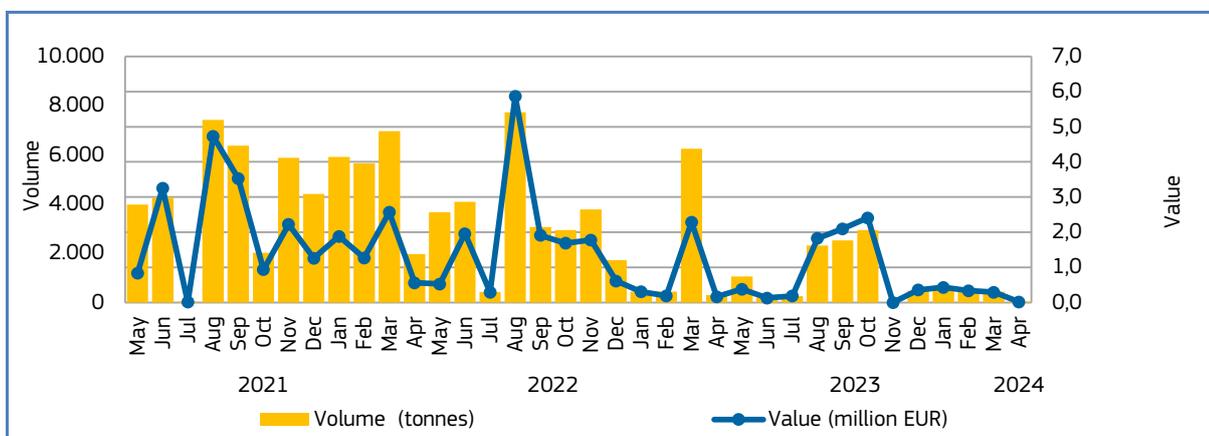
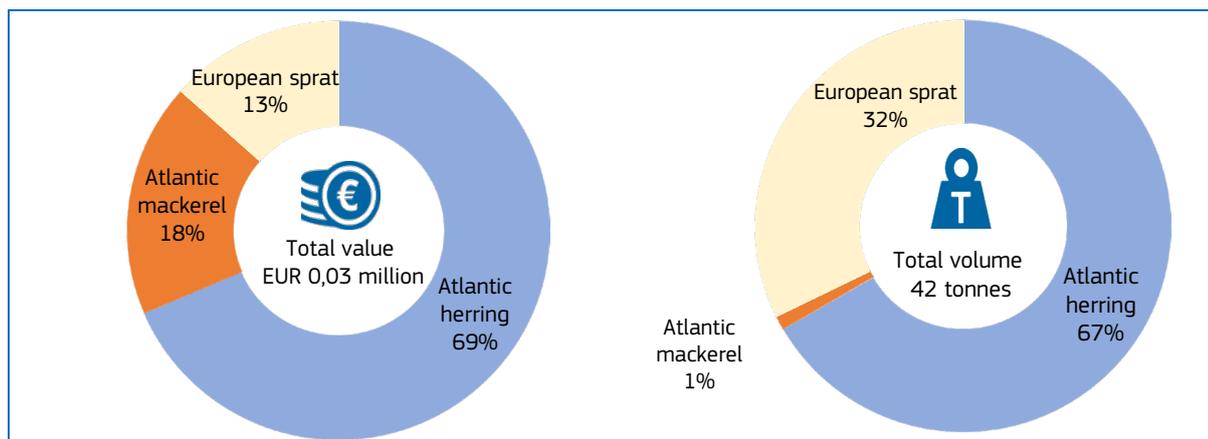


Figure 28. ATLANTIC HERRING: FIRST SALES IN SWEDEN, MAY 2021 – APRIL 2024



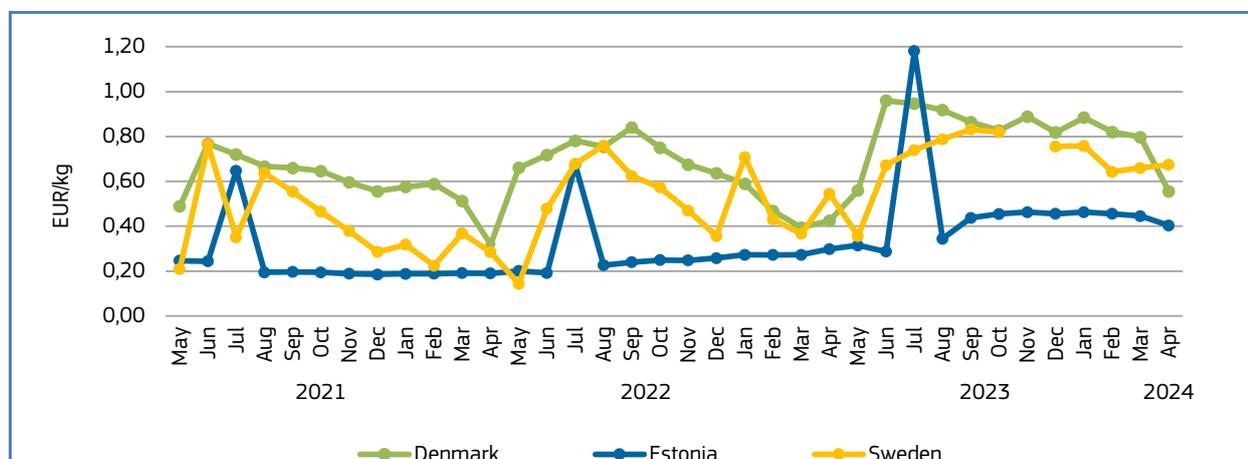
In **Sweden**, over the 36-month observation period from May 2021 to April 2024, the highest first-sales value of Atlantic herring was registered in August 2023 when 7.725 tonnes were sold for EUR 5,9 million.

Figure 29. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN SWEDEN IN VALUE AND VOLUME, APRIL 2024**



Price trend

Figure 30. **ATLANTIC HERRING: FIRST-SALES PRICES IN SELECTED COUNTRIES, MAY 2021 – APRIL 2024**



Over the 36-month observation period (May 2021 to April 2024), the weighted average first-sales price of Atlantic herring in **Denmark** was 0,74 EUR/kg, which was 153% higher than in **Estonia** (0,29 EUR/kg), and 51% higher than in **Sweden** (0,49 EUR/kg).

In **Denmark** in April 2024, the average first-sales price of Atlantic herring (0,56 EUR/kg) increased by 31% and by 74%, compared to April 2023 and 2022, respectively. In the 36-month period observed, the lowest average price at 0,32 EUR/kg for 1.535 tonnes was registered in April 2022, while the highest average price of 0,96 EUR/kg for 6.846 tonnes was recorded in June 2023.

In **Estonia** in April 2024, the average first-sales price of Atlantic herring (0,40 EUR/kg) increased by 35% compared to April 2023 and by 113% compared to April 2022. Over the past 36 months, the average price ranged from 0,19 EUR/kg for 2.440 tonnes in December 2021 to 1,18 EUR/kg for about 0,6 tonnes in July 2023.

In **Sweden** in April 2024, the average first-sales price of Atlantic herring (0,67 EUR/kg) increased by 24% compared to April 2023 and by 137% compared to 2022. During the period observed, the average price ranged from 0,14 EUR/kg for 3.676 tonnes in May 2022 to 0,83 EUR/kg for 2.524 tonnes in September 2023.

We have covered **Atlantic horse mackerel** in the previous *Monthly Highlights*:

First sales: MH 3/2019 (Denmark, the Netherlands, Sweden), MH 5/2021 (Estonia, Latvia, Portugal).

1.7. Focus on Atlantic horse mackerel



Atlantic horse mackerel (*Trachurus trachurus*) is a species of jack mackerel in the family Carangidae. The species prefers more temperate waters and can be found off the Atlantic coasts from Senegal up to Norway, and in the Mediterranean, but rarely in the Black Sea. The species spreads from the coast to more than 300 metres and prefers the deepest areas of the continental shelf²⁰. This species attains a maximum fork length of 60 cm (most commonly around 30 cm) and a weight of 1,5 kg²¹. It feeds on small fish and crustaceans. There are two main populations, with the west stock spawning in the eastern Atlantic and the north stock spawning in the North Sea. All have pelagic eggs, and spawning generally occurs during the summer,²² with peaks in May and June in the North Sea.²³

It is an important species in commercial fisheries where it is targeted by purse seiners, longlines, traps and coastal trawlers.²⁴ In purse seine fisheries it is caught together with other small pelagic species such as sardines and anchovies at night, when the fish are attracted by light. Belgium, France, Germany, Ireland, Netherlands, Portugal and Spain are among the main EU fishing nations for Atlantic horse mackerel.²⁵

In the EU, management measures include fishing effort restrictions such as mesh size for towed gear (at least 55 mm for South Western waters) and a minimum conservation reference size of 15 cm. No minimum conservation reference size applies to horse mackerel caught in waters adjacent to the Azores and under the sovereignty or jurisdiction of Portugal.²⁶ Most catches are used for human consumption. The species is utilised fresh, frozen, dried and salted, smoked and canned, and can be fried, broiled and baked.

Selected countries

Table 23. **COMPARISON OF ATLANTIC HORSE MACKEREL FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "SMALL PELAGICS" IN SELECTED COUNTRIES**

Atlantic horse mackerel		Changes in Atlantic horse mackerel first sales Jan-Apr 2024 (%)		Contribution of Atlantic horse mackerel to total "small pelagics" first sales in April 2024 (%)	Principal places of sale in April 2024 in terms of first-sales value
		Compared to Jan-Apr 2023	Compared to Jan-Apr 2022		
Portugal	Value	-21%	-3%	71%	Peniche, Nazaré, Aveiro.
	Volume	-13%	-1%	59%	
Spain	Value	+28%	-31%	4%	A Coruña, Santa Eugenia Ribeira, Ondárroa.
	Volume	+32%	-39%	4%	

²⁰ <http://www.fao.org/3/Y2668B/y2668b06.htm>

²¹ http://species-identification.org/species.php?species_group=fnam&id=1794

²² <http://www.fao.org/fishery/species/2306/en>

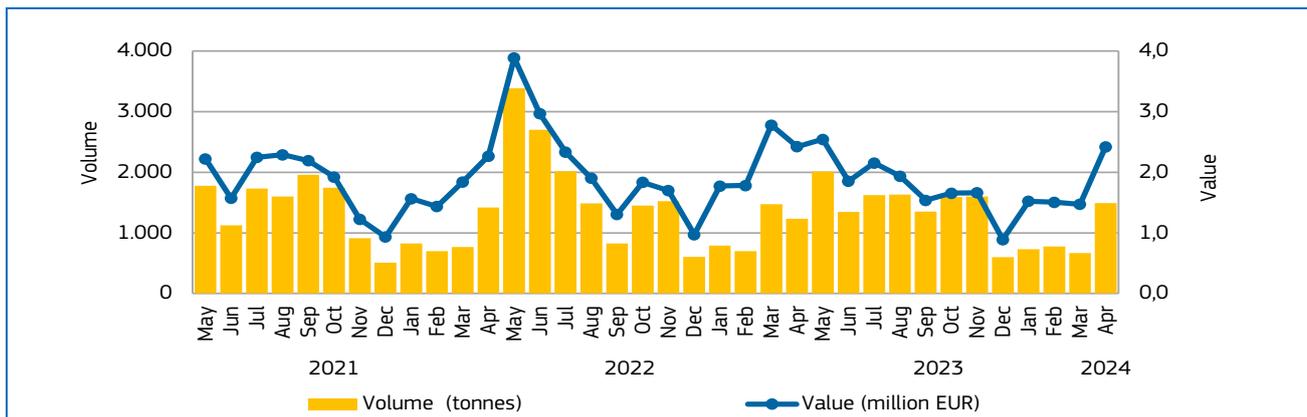
²³ <https://www.ices.dk/about-ICES/projects/EU-RFP/EU%20Repository/ICES%20FishMap/ICES%20FishMap%20species%20factsheet-horsemackerel.pdf>

²⁴ <http://www.fao.org/fishery/species/2306/en>

²⁵ ICES WGWIDE 2019 Horse Mackerel in the Northeast Atlantic

²⁶ Regulation (EU) 2019/1241 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02019R1241-20210101>

Figure 31. ATLANTIC HORSE MACKEREL: FIRST SALES IN PORTUGAL, MAY 2021 – APRIL 2024



In **Portugal** over the 36-month period observed, the highest first-sales value and volume were registered in May 2022 when 3.383 tonnes of Atlantic horse mackerel were sold for EUR 3,9 million.

Figure 32. FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN PORTUGAL IN VALUE AND VOLUME, APRIL 2024

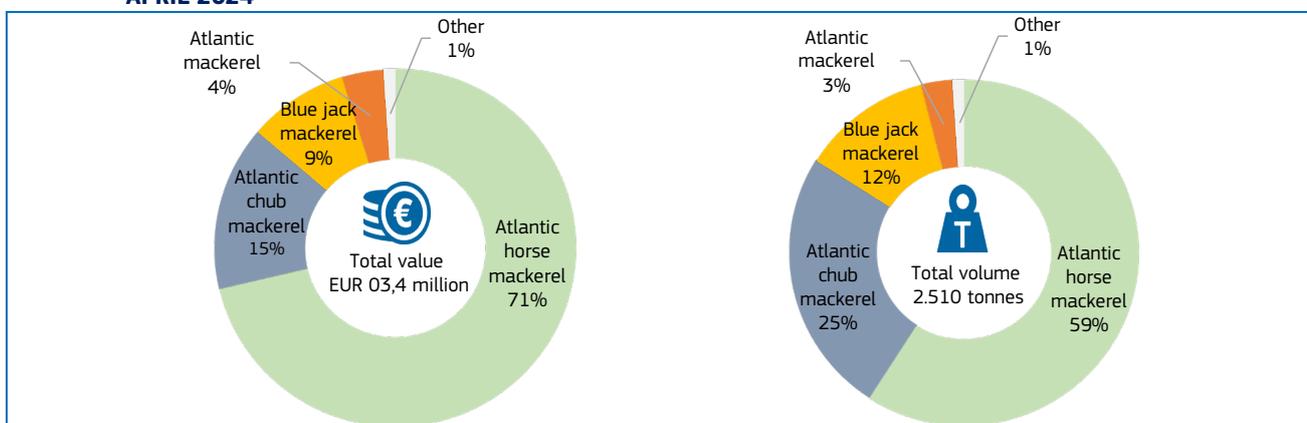
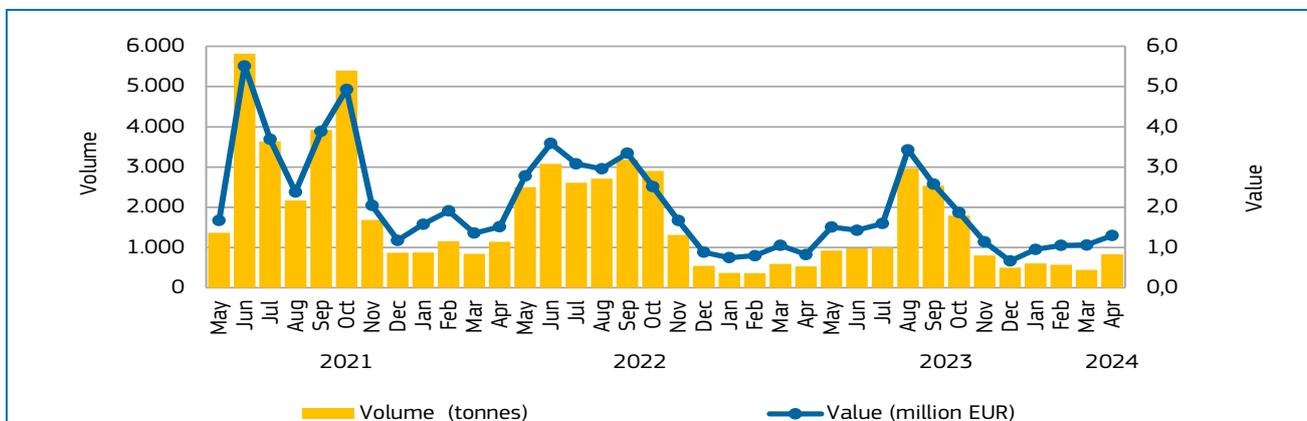
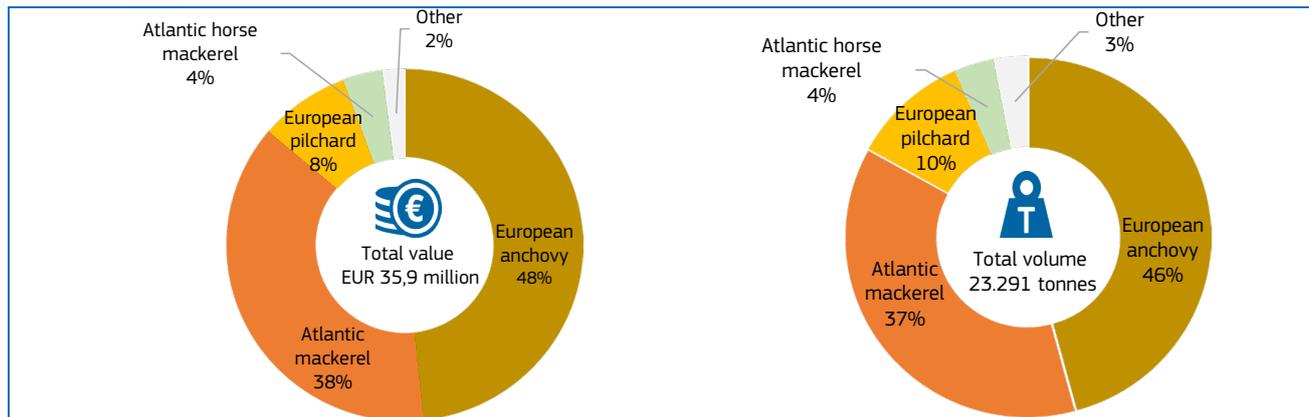


Figure 33. ATLANTIC HORSE MACKEREL: FIRST SALES IN SPAIN, MAY 2021 – APRIL 2024



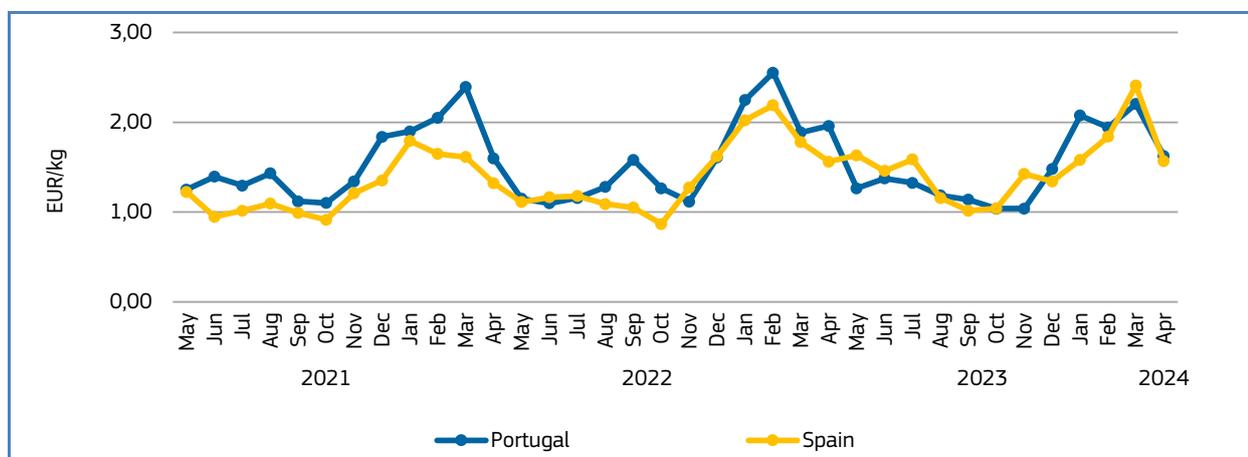
In **Spain** over the 36-month period observed, the highest first-sales value and volume were registered in June 2021 when about 5.820 tonnes were sold for EUR 5,5 million.

Figure 34. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, APRIL 2024**



Price trend

Figure 35. **ATLANTIC HORSE MACKEREL: FIRST-SALES PRICES IN SELECTED COUNTRIES, MAY 2021 – APRIL 2024**



Over the 36-month observation period (May 2021 – April 2024), the weighted average first-sales price of Atlantic horse mackerel in **Portugal** was 1,41 EUR/kg, 20% higher than in **Spain** (1,17 EUR/kg),

In **Portugal** in April 2024, the average first-sales price of Atlantic horse mackerel (1,62 EUR/kg) decreased by 17% compared to April 2023 and increased by 2% compared to April 2022. In the 36-month period observed, the lowest average price of 1,04 EUR/kg for 1.600 tonnes was registered in November 2023, while the highest price of 2,55 EUR/kg for about 698 tonnes was recorded in February the same year.

In **Spain** in April 2024, the average first-sales price of Atlantic horse mackerel (1,57 EUR/kg) remained stable compared to April 2023, but increased by 18% compared to April 2022. During the period observed, the highest average price of 2,41 EUR/kg was reached in March 2024 when 442 tonnes were sold, while the price bottomed out in October 2022 (0,87 EUR/kg) when 2.900 tonnes were sold.

We have covered **Atlantic horse mackerel** in the previous *Monthly Highlights*:

First sales: MH 5/2021 (France, Portugal, the Netherlands), MH 10/2022 (Italy, the Netherlands, Sweden).

2. Extra-EU imports

The weekly extra-EU import prices (weighted average values per week, in EUR per kg) for nine different species are examined every month. The three most relevant species in terms of value and volume remain consistent: fresh or chilled Atlantic and Danube salmon from Norway, frozen Alaska pollock fillets from China, and frozen tropical shrimp (*Penaeus* spp.) from Ecuador. The other six species change each month; three are chosen from the commodity group of the month, and three are randomly selected. The commodity group for this month is “small pelagics”²⁷.

Data analysed in the section “Extra-EU imports” are extracted from EUMOFA, as collected from the European Commission.²⁸

Table 24. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THE THREE MOST RELEVANT FISHERIES AND AQUACULTURE PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 19/2024	Preceding 4-week average	Week 19/2023	Notes
Atlantic salmon and Danube salmon, excluding liver and roes, fresh imported from Norway (<i>Salmo salar</i> , <i>Hucho hucho</i> CN code 03021400)	Price (EUR/kg)	9,93	9,95 (0%)	9,11 (+9%)	From weeks 20/2021 to 19/2024 prices fluctuated, showing an increasing trend ranging between 5,09 EUR/kg (week 37/2021) and 11,28 EUR/kg (week 16/2022). The highest peaks occur between weeks 10 and 18, showing a strong seasonality following supply.
	Volume (tonnes)	8.396	7.464 (+12%)	8.634 (-3%)	
Frozen Alaska pollock fillets imported from China (<i>Theragra chalcogramma</i> , CN code 03047500)	Price (EUR/kg)	2,81	2,56 (+10%)	3,47 (-19%)	Between weeks 20/2021 to 19/2024 prices showed fluctuations, ranging between 1,84 EUR/kg (week 48/2022) and 4,03 EUR/kg (week 41/2022).
	Volume (tonnes)	1.071	725 (+48%)	2.857 (-63%)	
Frozen tropical shrimp imported from Ecuador (genus <i>Penaeus</i> , CN code 03061792)	Price (EUR/kg)	5,20	5,06 (+3%)	6,02 (-14%)	From weeks 14/2021 to 13/2024 prices fluctuated between 4,83 EUR/kg (week 07/2024) and 7,19 EUR/kg (week 41/2022) showing a decreasing trend.
	Volume (tonnes)	3.571	2.777 (+29%)	1.550 (+130%)	

²⁷ The featured species of the commodity group of the month are fresh or chilled southern hake from Chile, frozen cod from the Russian Federation and frozen haddock from Norway. The three randomly selected species this month are frozen fillets of Argentine hake from Argentina, preparations of surimi from Thailand and frozen coalfish from Norway.

²⁸ Last update: 18. 6. 2024.

Figure 36. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY, 2021 - 2024**

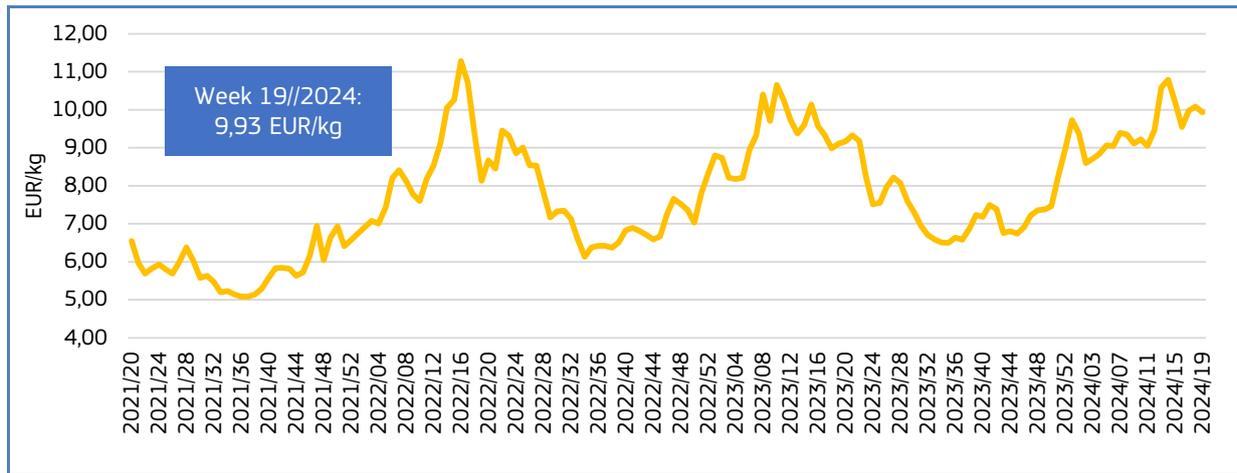


Figure 37. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2021 - 2024**

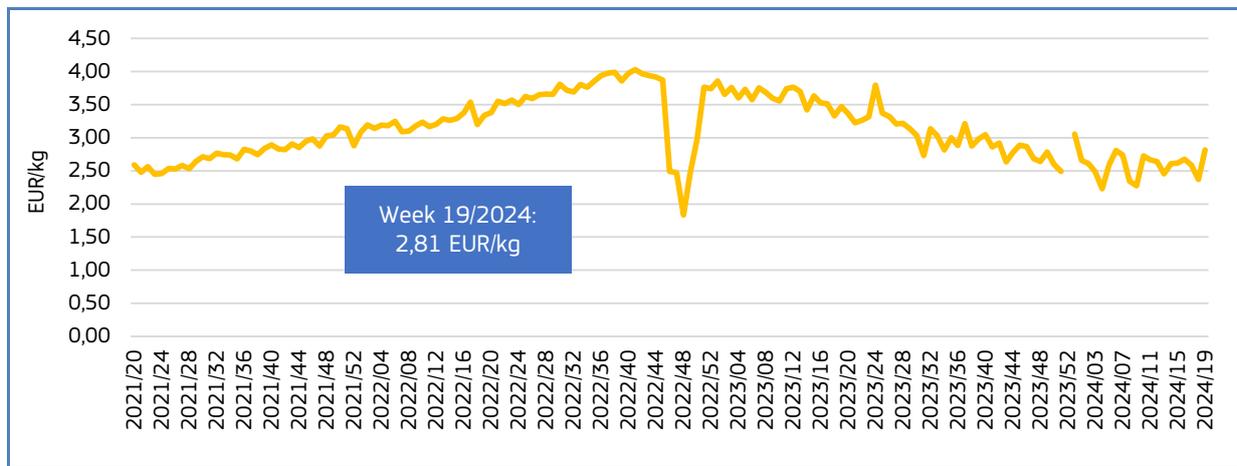
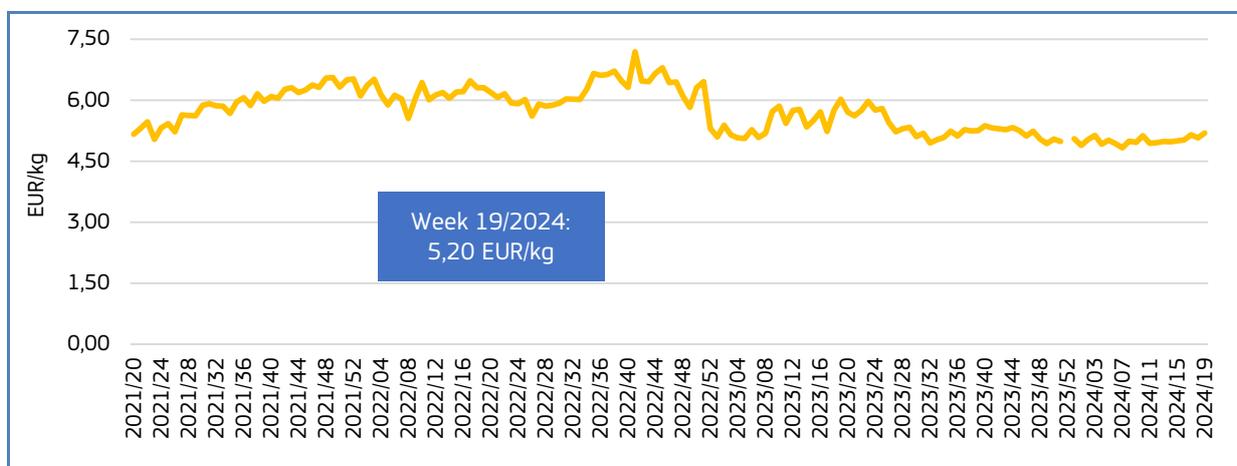


Figure 38. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2021 - 2024**



Overview | [1. First sales in Europe](#) | [2. Extra-EU imports](#) | [3. Consumption](#)

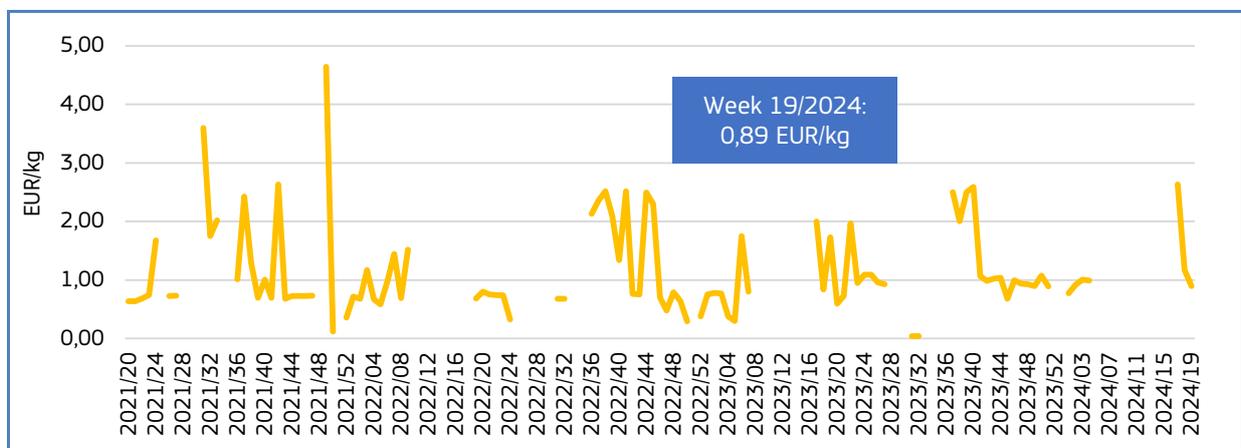
| [4. Fisheries and Aquaculture in the Middle East](#) | [5. Hake in the EU](#) | [6. Global highlights](#) |

[7. Macroeconomic context](#)

Table 25. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 19/2024	Preceding 4-week average	Week 19/2023	Notes
Fresh or chilled herring from Norway ("Clupea harengus, Clupea pallasii", CN code 03024100)	Price (EUR/kg)	0,89	1,90 (-53%)	1,73 (-48%)	Between weeks 20/2021 to 19/2024 prices fluctuated strongly between the minimum price 0,04 EUR/kg (week 31/2023) and maximum price 4,65 EUR/kg (week 49/2021). 62% of the weekly prices were below 1,00 EUR/kg. Volumes showed strong fluctuations ranging from 1 kg (week 40/2022) to 3.998 tonnes (week 42/2023). 30% of the weekly supply was less than 1 tonne. Over the period analysed, the highest peaks in supply seem to occur most often between weeks 1/3, 20/22, 27, 39/43.
	Volume (tonnes)	1	0,3 (+124%)	0,06 (+1038%)	
Sardines, prepared or preserved, whole or in pieces (excl. minced sardines and sardines in olive oil) from Morocco (CN code 16041319)	Price (EUR/kg)	4,26	4,41 (-3%)	4,63 (-8%)	Between weeks 20/2021 to 19/2024 prices fluctuated following an increasing trend ranging between 2,25 EUR/kg (week 51/2022) and 6,68 EUR/kg (week 04/2024). 45% of weekly prices were between 3,00 EUR/kg and 4,00 EUR/kg. In the period analysed supply fluctuated strongly but did not seem to follow a clear seasonality. Highest peaks seem to occur in weeks 1/3, 42/49. Volume ranged from 61 tonnes (week 34/2021) to 991 tonnes (week 03/2024). 35% of the weekly supply was more than 400 tonnes.
	Volume (tonnes)	428	259 (+65%)	579 (-26%)	
Frozen fillets of mackerel and fish of the species Orcynopsis unicolor from Iceland ("Scomber scombrus, Scomber japonicus", CN code 03048949)	Price (EUR/kg)	3,10	2,78 (+11%)	2,78 (+11%)	Prices fluctuated in the period analysed, ranging between 1,17 EUR/kg (week 52/2021) and 3,15 EUR/kg (week 45/2023). 75% of the weekly prices were between 2,50 and 3,00 EUR/kg. Very high fluctuations in supply from 5 tonnes (week 32/2022) to 1.082 tonnes (week 20/2021). 48% of the weekly supply was below 100 tonnes. Highest peaks in supply seem to occur between 4/5, 7/8,18/20 and 46/48.
	Volume (tonnes)	12	146 (-92%)	141 (-91%)	

Figure 39. **IMPORT PRICE OF FRESH OR CHILLED HERRING FROM NORWAY, 2021 - 2024**



Overview | 1. First sales in Europe | 2. Extra-EU imports | 3. Consumption

| 4. Fisheries and Aquaculture in the Middle East | 5. Hake in the EU | 6. Global highlights | 7. Macroeconomic context

Figure 40. **IMPORT PRICE PREPARED OR PRESERVED SARDINES FROM MOROCCO, 2021 - 2024**

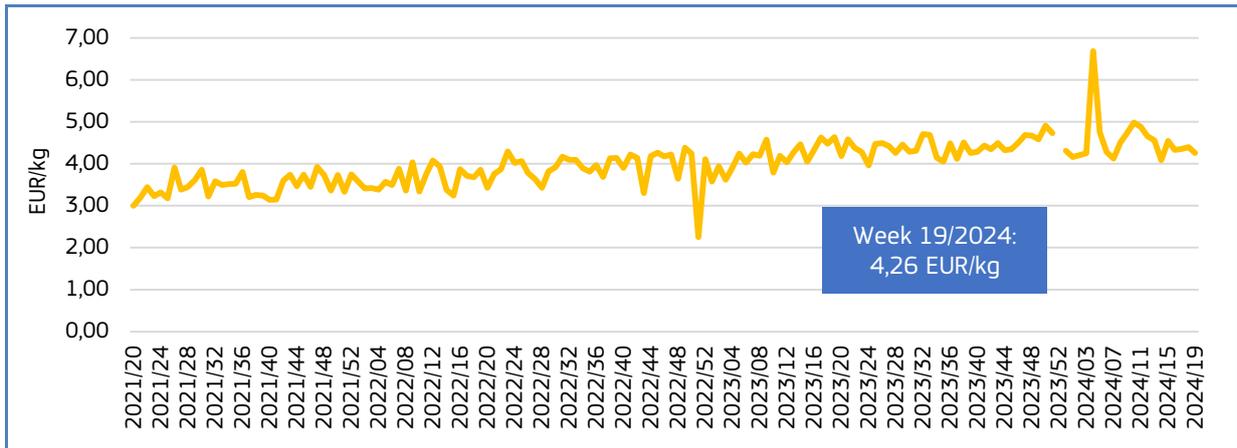
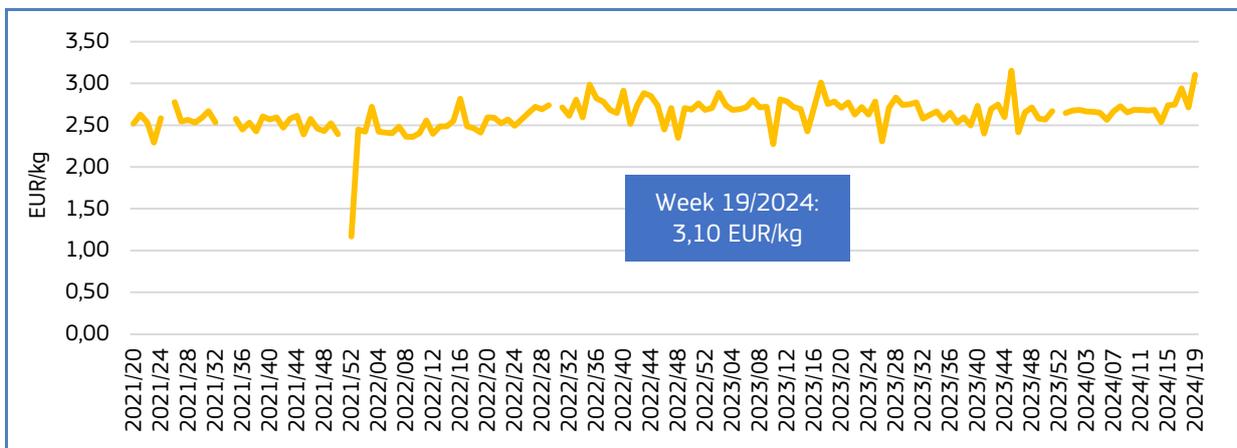


Figure 41. **IMPORT PRICE OF FROZEN FILLETS OF MACKEREL FROM ICELAND, 2021 - 2024**



Between weeks 01/2024 and 19/2024, the price of fresh or chilled **herring** from **Norway** showed some fluctuations and an increasing trend. The price ranged between 0,89 EUR/kg and 2,63 EUR/kg, and volume fluctuated ranging between 2 kilos and 2.191 tonnes.

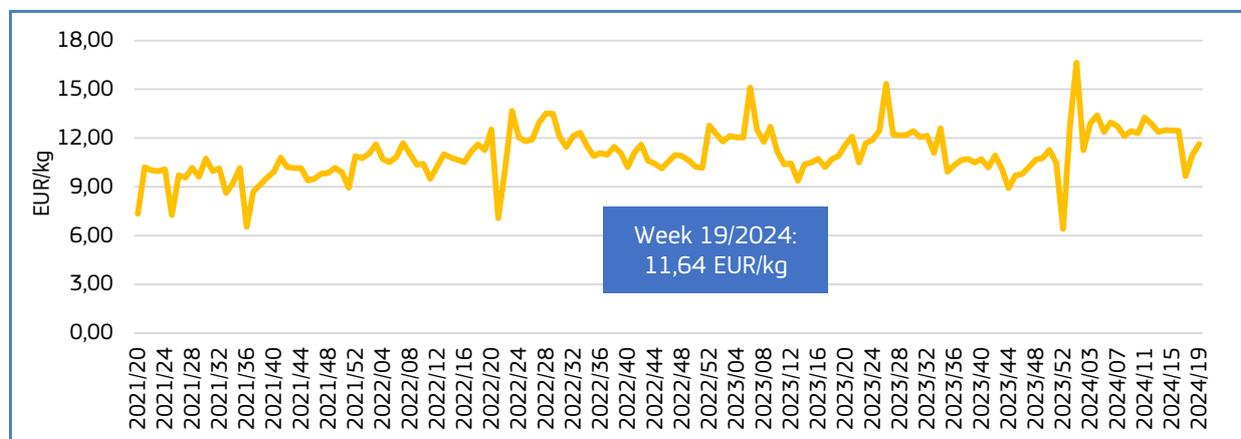
Between weeks 01/2024 and 19/2024, the price of prepared or preserved **sardines** from the **Morocco** fluctuated and increased. The price ranged between 4,08 EUR/kg and 6,68 EUR/kg. Supply fluctuated strongly between 133 tonnes and 911 tonnes.

In 2024, the price of frozen fillets of **mackerel** from **Iceland** showed some fluctuations and an increasing trend. The price ranged between 2,54 EUR/kg and 3,10 EUR/kg, and volume fluctuated strongly between 6 tonnes and 650 tonnes.

Table 26. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF EU IMPORTS OF THREE OTHER FISHERIES AND AQUACULTURE PRODUCTS RELEVANT TO THE EU MARKET**

Extra-EU Imports		Week 19/2024	Preceding 4-week average	Week 19/2023	Notes
Fresh or chilled Atlantic halibut from Norway (" <i>Hippoglossus hippoglossus</i> ", CN code 03022130)	Price (EUR/kg)	11,64	11,39 (+2%)	10,89 (+7%)	Between weeks 20/2021 to 19/2024 prices fluctuated following an increasing trend ranging between 6,41 EUR/kg (week 52/2023) and 16,63 EUR/kg (week 01/2024). 52% of the weekly prices were between 10,00 EUR/kg and 12,00 EUR/kg.
	Volume (tonnes)	17	32 (-47%)	17 (+2%)	Supply fluctuated ranging from 38 kg (week 52/2023) to 75 tonnes (week 48/2023). Supply is seasonal with the highest peaks occurring most often between weeks 45 and 50. 42% of the weekly supply was less than 20 tonnes.
Fresh or chilled redfish from Iceland (" <i>Sebastes marinus</i> ", CN code 03028931)	Price (EUR/kg)	1,88	1,88 (0%)	2,65 (-29%)	In the period analysed prices fluctuated following an increasing trend from the minimum price of 1,41 EUR/kg (week 20/2021) to the maximum price of 4,77 EUR/kg (week 52/2022), and then decreasing up to the latest week analysed. 71% of the weekly prices were between 2,00 EUR/kg and 3,00 EUR/kg.
	Volume (tonnes)	196	273 (-28%)	200 (-2%)	Volumes showed strong fluctuations ranging between 10 tonnes (week 52/2022) to 482 tonnes (week 17/2022). No clear seasonality is detected, and the highest peaks in supply were recorded in 2022. 45% of the weekly supply was below 200 tonnes.
Frozen squid from India (" <i>Loligo</i> spp. excl. " <i>Loligo vulgaris, pealei</i> and <i>gahi</i> ", CN code 03074338)	Price (EUR/kg)	4,13	3,76 (+10%)	4,11 (+1%)	Between weeks 20/2021 to 19/2024 prices followed an increasing trend to the maximum price of 6,78 EUR/kg (week 46/2022), to then decrease to the minimum price of 3,15 EUR/kg (week 02/2024) and then increase again. 40% of the weekly prices were between 4,00 and 5,00 EUR/kg.
	Volume (tonnes)	855	897 (-5%)	499 (+71%)	Volumes showed strong fluctuations ranging from 86 tonnes (week 34/2021) to 1.272 tonnes (week 01/2022). The highest peaks in supply were recorded in 2022. 54% of the weekly supply was higher than 600 tonnes.

Figure 42. **IMPORT PRICE OF FRESH OR CHILLED ATLANTIC HALIBUT FROM NORWAY, 2021 - 2024**



Overview | 1. First sales in Europe | 2. Extra-EU imports | 3. Consumption

4. Fisheries and Aquaculture in the Middle East | 5. Hake in the EU | 6. Global highlights | 7. Macroeconomic context

Figure 43. **IMPORT PRICE OF FRESH OR CHILLED REDFISH FROM ICELAND, 2021 - 2024**

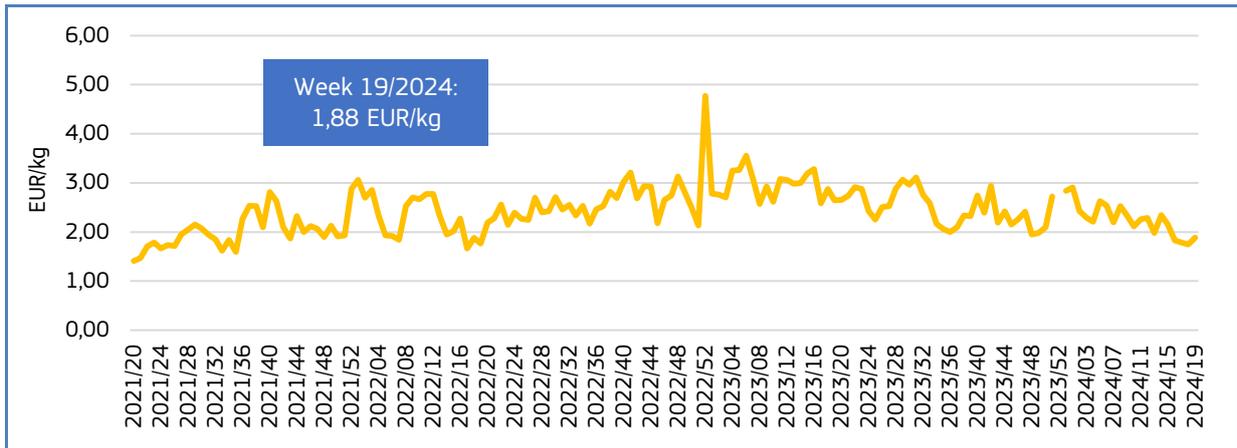
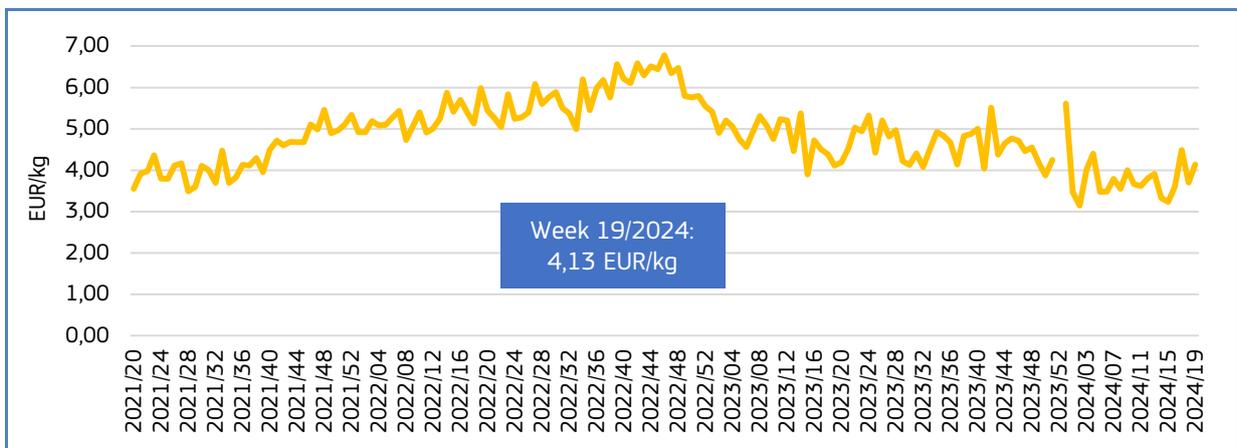


Figure 44. **IMPORT PRICE OF FROZEN SQUID FROM INDIA, 2021 - 2024**



Between weeks 01/2024 and 19/2024, the price of fresh or chilled of **Atlantic halibut** from **Norway** showed fluctuations and a decreasing trend. The price ranged between 9,66 EUR/kg and 16,63 EUR/kg, and volume fluctuated ranging between 9 tonnes and 39 tonnes.

Between weeks 01/2024 and 19/2024, the price of fresh or chilled **redfish** from **Iceland** fluctuated and decreased. The price ranged from 1,75 EUR/kg to 2,91 EUR/kg. Supply fluctuated strongly between 77 tonnes and 396 tonnes.

In 2024, the price of frozen **squid** from **India** showed an increasing trend. Price ranged between 3,15 EUR/kg and 4,49 EUR/kg, and volume fluctuated between 110 tonnes and 1.208 tonnes.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

Data analysed in the section “Consumption” are extracted from EUMOFA, as collected from Europanel²⁹.

In April 2024 compared with April 2023, household consumption of fresh fisheries and aquaculture products fell in Denmark, France, Germany, Ireland, Italy, the Netherlands and Poland, while in Hungary and Sweden an increase was observed, both in volume and value. In Hungary, where the highest increase was observed in absolute terms, the composition of fish species was not specified, while in Sweden it was mainly due to salmon (27% of volume and 7% of value). Pike-perch also added to the increase, although the species is not available in each month. It was available in April 2024, as opposed to April 2023. The highest decrease was reported in Germany due to lower consumption of carp (96% of volume and 95% of value), the mussel *Mytilus* spp. (82% of volume and 78% of value) and plaice (66% of volume and 60% of value).

Table 27. **APRIL OVERVIEW OF THE HOUSEHOLD CONSUMPTION OF FRESH FISHERY AND AQUACULTURE PRODUCTS IN THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)**

Country	Per capita apparent consumption 2021* (live weight equivalent, LWE) kg/capita/year	April 2022		April 2023		March 2024		April 2024		Change from April 2023 to April 2024	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	20,00-25,00	1.058	19,75	989	21,52	1.131	23,80	884	16,96	11%	21%
France	32,18	15.974	213,44	15.043	205,77	15.787	220,37	13.245	190,52	12%	7%
Germany	12,51	6.035	99,91	5.117	97,33	6.272	115,08	4.001	71,48	22%	27%
Hungary	6,55	305	1,86	185	1,72	387	3,41	242	2,01	30%	17%
Ireland	14,56	1.056	16,90	960	16,97	1.125	20,21	863	15,64	10%	8%
Italy	30,15	21.346	241,86	18.090	222,57	21.348	271,93	16.478	210,03	9%	6%
Netherland	21,08	2.703	53,89	2.460	53,03	2.992	64,12	2.123	43,46	14%	18%
Poland	14,26	3.563	27,10	3.397	31,94	3.925	43,00	2.847	31,49	16%	1%
Portugal	56,52	5.234	38,69	4.749	28,82	4.464	37,78	4.353	34,47	8%	20%
Spain	42,98	38.963	351,14	38.937	371,83	37.926	383,92	37.287	374,52	4%	1%
Sweden	22,71	802	11,40	467	8,11	977	14,89	542	8,39	16%	3%

* EUMOFA estimates. The supply balance is built on the basis of the equation catches + aquaculture production + imports – exports = apparent consumption and is calculated in live weight equivalent. The methodologies for estimating apparent consumption at EU and Member State levels are different, the first based on data and estimates, the latter also requiring the adjustment of abnormal trends due to the higher impact of stock changes. Where EUMOFA estimations on per capita apparent consumption continued to show high annual volatility even with these adjustments, national contact points were contacted to confirm these estimates or to provide their own figures. For the Netherlands and Poland, sources are the Dutch Fish Marketing Board and Institute of Agricultural and Food Economics - National Research Institute, respectively. The estimate for Denmark was provided by the University of Copenhagen.

Over the past three years, average household consumption of fresh fisheries and aquaculture products in April has been below the annual average in both volume and value in all reporting countries.

The most recent monthly consumption data (up to **May 2024**) are available on the EUMOFA website and can be accessed [here](#).

²⁹ Last update: 20. 6. 2024.

3.2. Whiting

Habitat: A demersal, temperate species with a white, firm and delicate flesh found in coastal waters at a depth range of 10-200 m³⁰.

Catch area: North Atlantic, North Sea, extends to the Mediterranean and the Black Sea.

Catching countries in the EU: France, Ireland, Denmark, the Netherlands³¹.

Production method: Caught.

Main consumers in the EU: France, Ireland.

Presentation: Whole, fillets.

Preservation: Fresh, chilled, frozen, dried, salted, smoked.

3.2.1. Overview of household consumption in France

Based on EUMOFA estimates, per capita apparent consumption in France of fishery and aquaculture products was 32,56 kg LWE, 37% above the EU average (23,71 kg LWE), and fourth on the list of EU countries. Compared to Portugal (56,52 kg LWE), which has the highest consumption within the EU, per capita apparent consumption of France was 42% lower, but 397% higher than Hungary (6,55 kg LWE) which has the lowest seafood consumption within the EU.

The average monthly consumption of whiting in France shows a decreasing trend compared to previous years. With 1.327 tonnes in 2024, it was 15% and 28% lower than in the same period in 2023 and 2021, respectively. When only April is considered, the decrease is even bigger: 35% compared to 2023 and 42% compared to 2021. In 2024, French consumers paid an average of 15,70 EUR per kg for whiting, which was 4% higher compared to the same period in 2023 (15,14 EUR).

We have covered **whiting** in previous *Monthly Highlights*:

First-sales: **MH 6 2019** (NL, PT, UK); **MH 10 2018** (FR, IT, UK); **MH 4 2016** (FR); **MH 6 2015** (UK); **MH March 2013** (FR).

Consumption: **MH 5 2022** (FR); **MH 7 2017** (FR).

Topic of the month: First sales of whiting in major places of sale

³⁰ <https://www.fishbase.se/summary/Merlangius-merlangus.html>

³¹ MH 5 2022

Figure 45. **PRICES OF WHITING PURCHASED BY FRENCH HOUSEHOLDS**

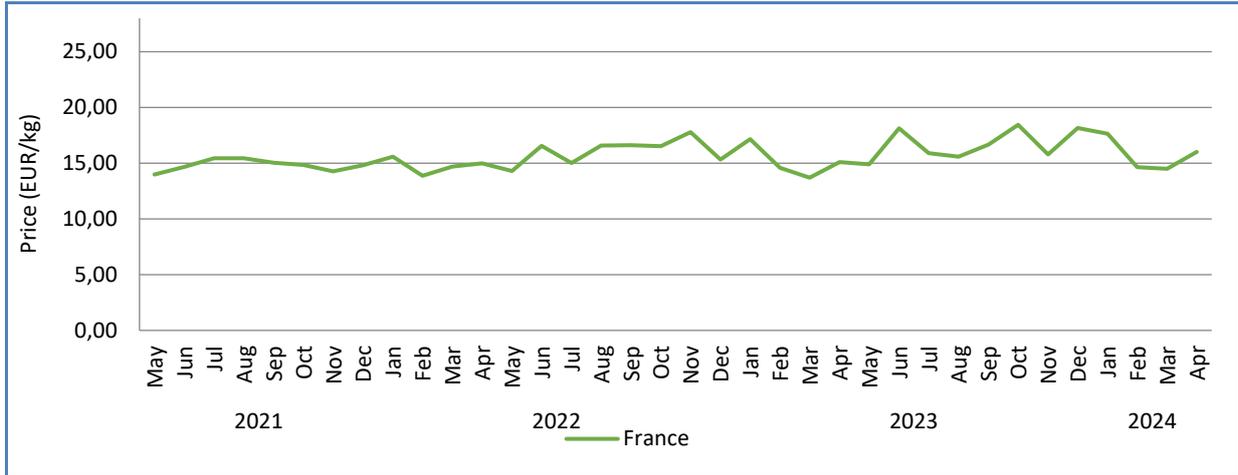
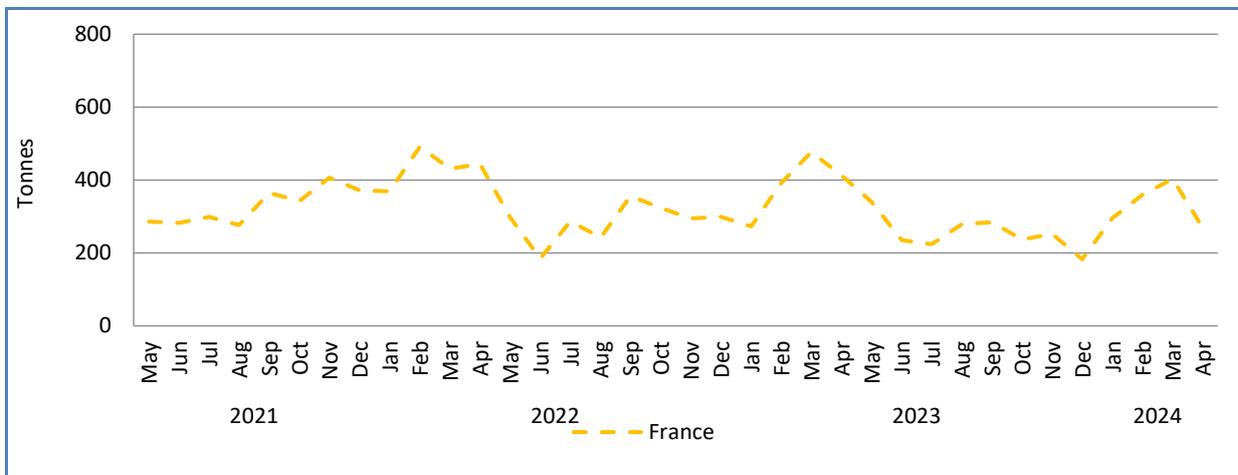


Figure 46. **HOUSEHOLD PURCHASES OF WHITING IN FRANCE**



3.2.2. Household consumption trends in France

Long-term trend (May 2021 to April 2024): Downward trend in volume and upward trend in price.

Yearly average price: 14,52 EUR/kg (2021), 15,65 EUR/kg (2022), 16,17 EUR/kg (2023).

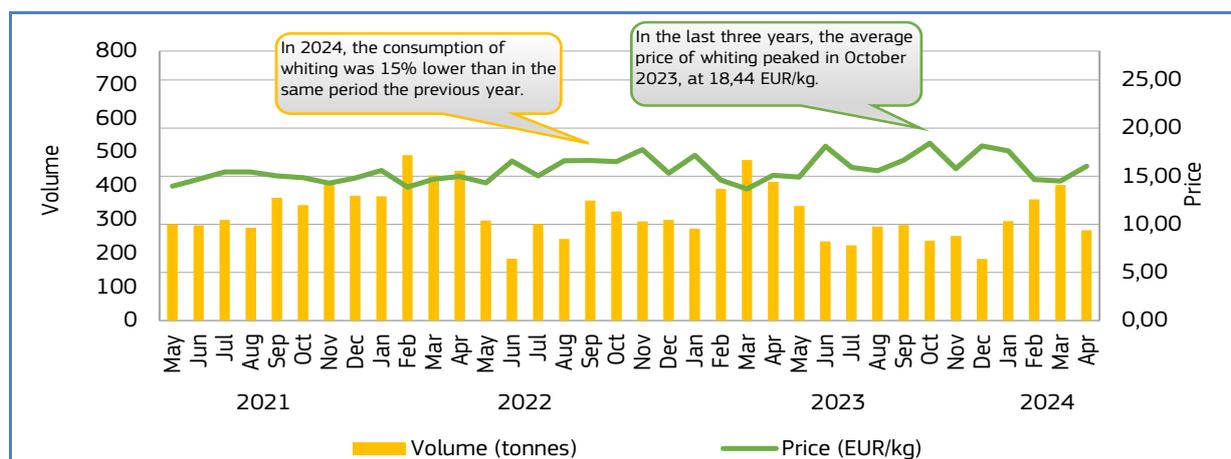
Yearly consumption: 4.479 tonnes (2021), 4.018 tonnes (2022), 3.585 tonnes (2023).

Short-term trend (January-April 2024): Fluctuating volumes and prices.

Price: 15,70 EUR/kg.

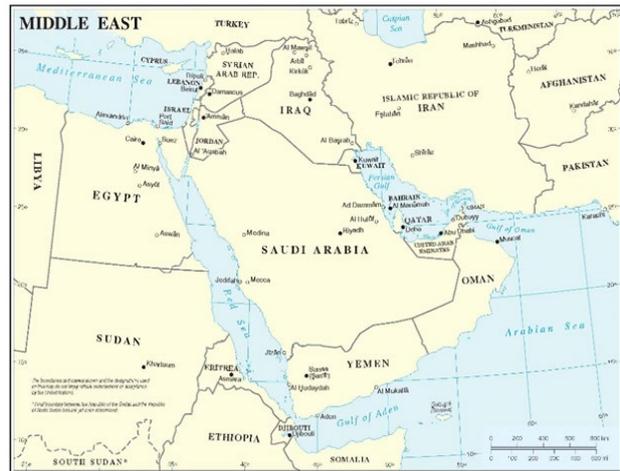
Consumption: 1.327 tonnes.

Figure 47. **RETAIL PRICE AND VOLUME OF WHITING PURCHASED BY HOUSEHOLDS IN FRANCE, MAY 2021 – APRIL 2024**



4. Case study: Fisheries and aquaculture in the Middle East

The Middle East is a large region comprising several countries, spanning from the southern to the eastern shores of the Mediterranean Sea³². In this case study, the Middle Eastern countries included are Bahrain, Egypt, the Islamic Republic of Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Palestine, Qatar, Saudi Arabia, Syria, Turkey, United Arab Emirates (UAE) and Yemen³³.

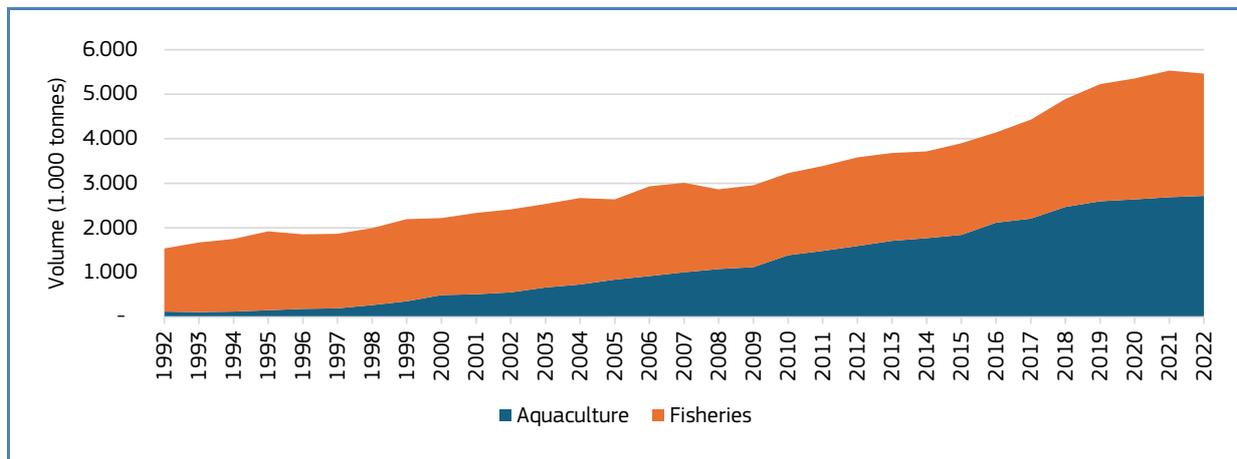


Source: United Nations

4.1. Fisheries and aquaculture in the Middle East

Fisheries and aquaculture in the Middle East have seen significant growth over the past three decades. In 2022, the total production of fishery and aquaculture products in the Middle East reached 5,5 million tonnes. Fisheries production increased from 1,3 million tonnes in 1992 to 2,7 million tonnes in 2022, while aquaculture surged from 111.952 tonnes to 2,7 million tonnes during the same period. In 2022, aquaculture accounted for nearly half of the total production (49,8%), emphasizing its rising importance in the region. The large increase in aquaculture is to a large degree driven by government initiatives to enhance food security in several of the countries and reduce dependency on imported seafood³⁴.

Figure 48. TOTAL PRODUCTION OF FISHERY AND AQUACULTURE PRODUCTS IN THE MIDDLE EAST (1992-2022) (volume in 1000 tonnes)



Source: FAO.

³² FAO. Markets in the Middle East: market, trade and consumption.

³³ While Cyprus is often geographically associated with the Middle East, it is not included as part of the Middle East in this case study as it is a part of the European Union.

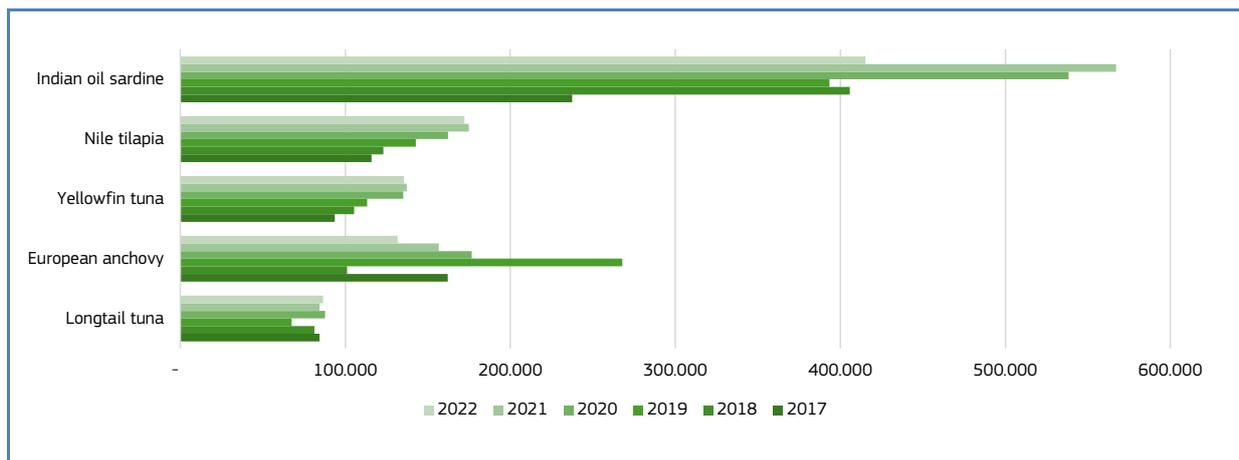
³⁴ FAO. The new investment wave into aquaculture in Middle East countries: Opportunities and challenge.

Fisheries production

The estimated fisheries production in the Middle East in 2022 amounted to 2,74 million tonnes. Compared to the 2021 capture statistics from the Food and Agriculture Organisation (FAO), this was a decrease of 3%. Despite the drop between 2021 and 2022, catch volumes have seen a growth of 93% from 1992 for the Middle Eastern countries. In 2022, 68% of total catch volumes came from the Western Indian Ocean. 13% of the total volume came from the Mediterranean and Black Sea, 12% from inland waters in Africa and 7% from inland waters in Asia.

The largest capture species groups are Indian oil sardine (*Sardinella longiceps*), Nile tilapia (*Oreochromis niloticus*), Yellowfin tuna (*Thunnus albacares*), European anchovy (*Engraulis encrasicolus*) and Longtail tuna (*Thunnus tonggol*). Even though catches of Indian oil sardine fell by 27% in 2022 compared with 2021, it was still the largest species in 2022 and reached a total volume of 415.348 tonnes.

Figure 49. TOP FIVE CAPTURED SPECIES IN THE MIDDLE EAST BY VOLUME (2017-2022) (volume in tonnes)



Source: FAO.

Oman is the leading producer of Indian oil sardine, followed by the Islamic Republic of Iran and Yemen. In 2022, Oman accounted for 68% of the total fisheries of this species, while the Islamic Republic of Iran and Yemen accounted for 23% and 9% of catches of Indian oil sardine in the Middle Eastern countries. For Nile tilapia, Egypt made up 97% of total catches, while Iraq made up 3%. Nile tilapia was introduced in Iraq in the late 1990s. The government in Iraq initially allowed it to be introduced for aquaculture purposes, but over time, Nile tilapia spread to rivers and lakes in Iraq³⁵.

In 2022, the two largest tuna species, Yellowfin tuna and Longtail tuna, reached 135.575 tonnes and 86.571 tonnes respectively. For Yellowfin tuna, Oman accounted for 53% of the total catch, followed by the Islamic Republic of Iran and Yemen with 29% and 18%. For Longtail tuna, the Islamic Republic of Iran accounted for 58% of the total catch, followed by Oman with 37% and Yemen with 4%. Most of the tuna landed by these countries was caught in the Indian Ocean where the stocks are managed by the Indian Ocean Tuna Commission (IOTC).

Table 28. IOTC CATCH VOLUME BY MIDDLE EASTERN COUNTRIES (tonnes live weight), 2019 - 2022

Catch nation	2019	2020	2021	2022
The Islamic Republic of Iran	243.004	257.148	273.181	282.377
Oman	62.836	115.462	130.835	128.083
Yemen	31.209	31.210	31.210	31.210
Saudi Arabia	7.456	8.736	10.196	10.196

³⁵ Jawad, L.A., Abdulsamad, S.M.S. (2021). Towards an Improved Tilapia Farming in Iraq: Recommendations for Future Application. In: Jawad, L.A. (eds) Tigris and Euphrates Rivers: Their Environment from Headwaters to Mouth. Aquatic Ecology Series, vol 11. Springer, Cham. https://doi.org/10.1007/978-3-030-57570-0_49

United Arab Emirates	7.618	7.501	7.468	7.468
Qatar	2.788	3.051	3.184	3.184
Egypt	676	1.321	790	790
Kuwait	165	145	165	165
Jordan	137	85	115	115
Bahrain	78	78	90	90
Total	355.967	424.737	457.234	463.678

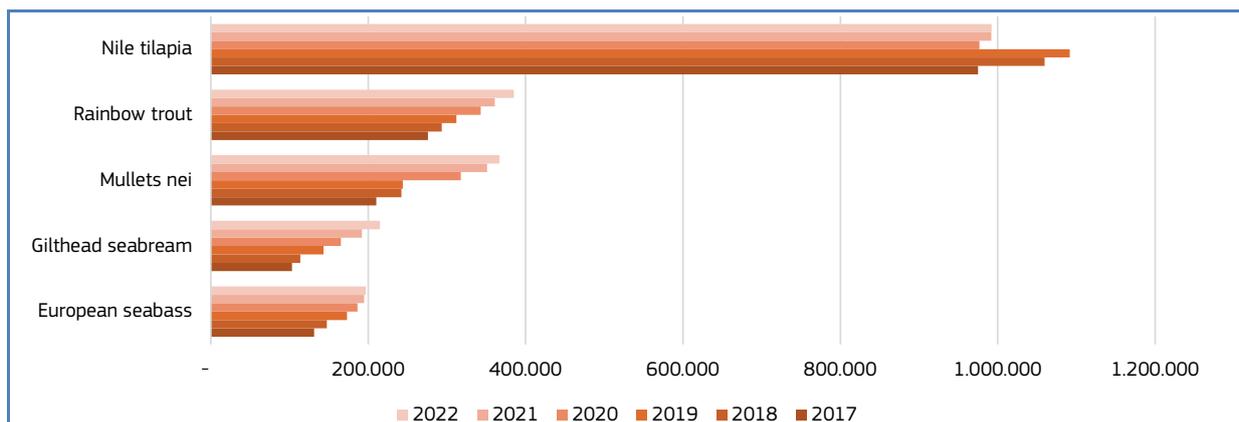
Source: IOTC

Since the end of 2023, the intensity and frequency of Houthi attacks on vessels in the Red Sea have escalated. The attacks have, to some degree, reportedly led to a decrease in fishing activities in the Red Sea as fewer vessels have gone to sea due to safety concerns. This has again affected livelihoods in the area, especially in communities where fishing is a primary source of income³⁶. The Red Sea is a critical maritime passage, and the attacks on commercial vessels and oil tankers have disrupted shipping operations noticeably. To reduce risk, several companies have reconsidered their trade routes and have chosen to take the longer route around the Cape of Good Hope. However, this new route adds considerable travel time and costs.

Aquaculture production

Over the past 30 years aquaculture has seen tremendous growth in the Middle East, growing from 119.395 tonnes in 1992 to 2,72 million tonnes of aquaculture products at a value of EUR 8,57 billion in 2022³⁷. From 2021 to 2022, aquaculture production and value increased by 1% and 5%. The largest species group farmed for aquaculture in the Middle East in 2022 was Nile tilapia which made up 37% of the total volume produced, followed by rainbow trout (*Oncorhynchus mykiss*) with 14%, mullets nei³⁸ (13%), gilthead seabream (*Sparus aurata*) (8%), and European seabass (*Dicentrarchus labrax*) (7%).

Figure 50. **TOP FIVE AQUACULTURE SPECIES IN THE MIDDLE EAST BY VOLUME (2017-2022) (volume in tonnes)**



Source: FAO.

The main producers of aquaculture products in the Middle East in 2022 were Egypt, Turkey and the Islamic Republic of Iran. In 2022, Egypt produced 57% of the total farmed volume in the Middle East. Turkey was the second largest producer with 19%, followed by the Islamic Republic of Iran with 18%. In Egypt, Nile tilapia, mullets and cyprinids nei made up the largest share of the farmed production volume (92%). In Turkey, rainbow trout, European seabass, and gilthead seabream made up 97% of the production volume. In the Islamic Republic of Iran, rainbow trout, silver carp (*Hypophthalmichthys molitrix*), and whiteleg shrimp (*Litopenaeus vannamei*) made up 78% of the total volume.

³⁶ ShareAmerica. Houthi attacks devastate Yemen's fishermen. <https://share.america.gov/houthi-attacks-devastate-yemens-fishermen/>

³⁷ FAO. Global Aquaculture Production – Value.

³⁸ Mulletts nei. Species under mulletts not specified.

Governments in several of the Middle Eastern countries have been providing financial support to aquaculture projects to encourage growth in production. Several countries in the region recognize the importance of aquaculture in ensuring food security, reducing dependency on imported seafood, and diversifying economies. Back in 2013, the Saudi Arabian Ministry of Agriculture and Fisheries set the goal of producing one million tonnes of fish by 2030 and announced that it would grant USD 10,6 billion for various aquaculture projects to reach this goal. Similar actions were taken in Oman and Qatar when the Sultanate and the Ministry of Environment, respectively, announced that they would provide USD 1,29 billion for aquaculture development and build large fish breeding farms and research centres³⁹. Saudi Arabia has a comprehensive plan to become self-sufficient in various sectors, including aquaculture. The country has been investing heavily in the aquaculture sector as part of its Vision 2030 initiative, which aims to diversify the economy⁴⁰.

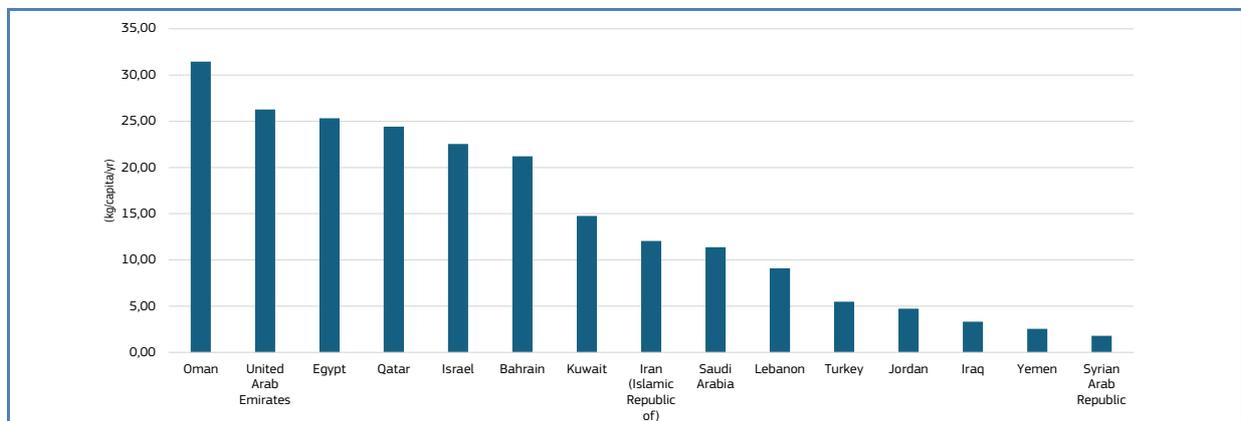
Fish and seafood consumption in the Middle East

Fish and seafood are an important commodity in the Middle East and are a key source of livelihood in many of the countries in the region. While certain countries in the Middle East are some of the largest seafood consumption markets globally, consumption varies noticeably throughout the region. Oman, the United Arab Emirates and Egypt are the three largest countries in terms of kg per capita per year. In 2021, fish and seafood consumption in these countries reached 31,44 kg (Oman), 26,26 kg (the UAE) and 25,32 kg (Egypt) per capita per year. Between 2010 and 2021, fish consumption in Egypt grew by 26%, and consumption in Oman and the United Arab Emirates increased by 9% and 6% during the same period. The largest growth in fish consumption per capita was seen in the Islamic Republic of Iran, with an increase from 8,50 kg/capita/year in 2010 to 12,06 kg (+42%).

Small pelagic fish species like mackerel and sardines are popular across the Middle East. Freshwater species such as tilapia and perch (*Perca* spp.) are also common. In some of the Middle Eastern countries (the Global Cooperation Council), imports of high value species such as lobster, salmon, shrimp have become more popular due to a growing tourism sector and economy. In Oman, demersal fish and pelagic fish species are the most popular and accounted for 50% and 27% of the total consumption volume. In Egypt, freshwater fish made up 55% of the consumption volume, followed by demersal and pelagic fish with 21% and 20%, respectively. In the United Arab Emirates, pelagic fish accounted for 36%, and demersal and freshwater fish each made up 26%.

The countries with the lowest consumption per capita are Syria, Yemen and Iraq with 1.79 kg, 2.55 kg and 3.32 kg, respectively. While Iraq saw an 8% increase in fish consumption between 2010 and 2021, consumption in Syria and Yemen declined by 41% and 8% during this period. In Syria and Yemen, pelagic fish accounted for 77% and 76% of the total consumption volume, while in Iraq, freshwater fish was the largest group with 66%.

Figure 51. **AVERAGE YEARLY CONSUMPTION OF FISHERY AND AQUACULTURE PRODUCTS IN THE MIDDLE EAST, 2021 (volume in kg/capita/year)**



Source: FAO⁴¹.

³⁹ FAO. Markets in the Middle East: market, trade and consumption. fao.org

⁴⁰ Arab News. Saudi fisheries program CEO lays out \$4bn investment plan. <https://www.arabnews.com/node/2019831/business-economy>

⁴¹ Fish and seafood consumption data on Palestine not available.

4.2. International trade

While the Middle East region itself does not constitute a single, unified trade area or organization, several regional trade organizations and economic partnerships play important roles in facilitating trade and economic cooperation among Middle Eastern countries. The Gulf Cooperation Council (GCC) is one of the most prominent regional organizations in the Middle East. It was established in 1981 and consists of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates. The GCC aims to achieve coordination, integration, and interconnection among member states in various fields, including economic and financial affairs, trade, customs and transportation.

The Union for the Mediterranean (UfM) is an intergovernmental organization that promotes cooperation between the European Union and Southern and Eastern Mediterranean countries, including several countries in the Middle East. The UfM supports regional projects aimed at enhancing trade, economic development, infrastructure and environmental sustainability, building on the Barcelona Process initiated in 1995. It consists of the following countries in the Middle East: Egypt, Israel, Jordan, Lebanon, Palestine, Syria (currently suspended) and Turkey⁴².

Other regional trade organizations are the League of Arab States, the Organization of Islamic Cooperation (OIC), the Economic Cooperation Organization (ECO), and the Agadir agreement. These agreements play vital roles in promoting economic development, reducing trade barriers, and enhancing connectivity among Middle Eastern countries and with other regions. Through initiatives like the Greater Arab Free Trade Area (GAFTA) and the Agadir Agreement, these organizations work towards increasing intra-regional trade and fostering economic integration, contributing to the overall growth in the region^{43,44}.

Export of fishery and aquaculture products from the Middle East

In 2021, the Middle East exported 672.767 tonnes of fishery and aquaculture products⁴⁵ at a value of EUR 1,7 billion. Compared to 2020, this was an increase of 10% in volume and 18% in value. In 2021, the largest export market for the Middle East was Thailand with 54.930 tonnes, followed by the Russian Federation and Taiwan with 50.145 tonnes and 49.561 tonnes, respectively. Exports to Thailand saw some fluctuations between 2019 and 2021, with a peak of 88.743 tonnes in 2020, an increase of 58% from 2019. However, in 2021 it declined again by 38% to 54.930 tonnes. Exports to the Russian Federation increased between 2019 and 2021, growing from 20.218 tonnes in 2019 to 50.145 tonnes in 2021. Exports to Taiwan also increased between 2019 to 2021, from 12.779 tonnes in 2019 to 49.561 tonnes in 2021.

Mackerel (nei frozen), gilthead seabream (fresh or chilled) and sardine, sardinella, brisling or sprat (frozen) were the three largest species groups⁴⁶ in terms of export volume⁴⁷. In 2021, the Middle East exported 80.450 tonnes of mackerel, 73.216 tonnes of gilthead seabream and 47.558 tonnes of sardine, sardinella, brisling or sprat (frozen). In terms of value, gilthead seabream (fresh or chilled) was the largest species with a value of EUR 187,6 million, followed by seabass (fresh or chilled) with EUR 163,9 million, and trout and char (frozen) with EUR 142,8 million.

In 2021, including intra-exports within the Middle East, a total volume of 1.022.650 tonnes of fishery and aquaculture products were exported from this region. This means that intra-exports between the Middle Eastern countries reached a total of 349.883 tonnes in 2021 at a value of EUR 641,9 million.

⁴² Union for the Mediterranean. *UfM*. <https://ufmsecretariat.org/>

⁴³ Union of Arab Chambers. Greater Arab Free Trade Area. <https://www.uac-org.org/en>

⁴⁴ Worldbank. Agreement setting up a free trade area between the Arab Mediterranean countries. [Agreement \(worldbank.org\)](https://www.worldbank.org)

⁴⁵ Excluding intra-trade in the Middle East.

⁴⁶ Fishmeals nei and Fish, frozen, nei is considered the largest and second largest commodity in terms of volume in 2022 with 780.582 tonnes and 3.216 tonnes. However, specific species/further details are not specified.

⁴⁷ Fishmeals nei, Mackerels nei, frozen, Gilthead seabream, fresh or chilled.

Table 29. **TOTAL EXPORT⁴⁸ OF FISHERY AND AQUACULTURE PRODUCTS FROM THE MIDDLE EAST BY TRADE PARTNER (volume in tonnes, value in EUR 1.000⁴⁹)**

Trade partner	2019		2020		2021	
	Volume	Value	Volume	Value	Volume	Value
Thailand	56.233	76.327	88.743	110.747	54.930 E	86.349 E
Russian Federation	20.218	83.298	31.729	121.714	50.145	204.420
Taiwan	12.779	35.151	20.230	38.122	49.561	33.682
Bangladesh	40.559	19.164	40.599	16.376	43.004	17.027
China	22.112	113.173	15.562	52.260	40.177	103.544
Viet Nam	40.123	92.532	27.588	44.621	32.299	50.577
Italy	27.160	108.400	27.039	120.394	31.338	146.521
Malaysia	12.746 E	24.698	23.498	43.627	30.104	61.525
India	22.083	14.368	37.533	29.617	30.039	21.199
Cameroon	2.811	2.867	12.829	15.156	28.801	30.483
Other	261.020	899.569	286.155	871.547	282.369	973.259
Total	517.844	1.469.547	611.505	1.464.182	672.767	1.728.586

Source: FAO.

Import of fishery and aquaculture products to the Middle East

In 2021, the Middle East imported 1,1 million tonnes of fishery and aquaculture products at a value of EUR 2,9 billion. Compared to 2020, this was a decrease of 17% in terms of volume and 0.4% in terms of value. In terms of volume, most imports to the Middle East came from Norway, Thailand and Morocco. In 2021, the Middle East imported a volume of 197.366 tonnes from Norway, 136.071 tonnes from Thailand and 121.552 tonnes from Morocco. Norway, Thailand and India were the three largest suppliers to the Middle East in terms of value, accounting for 43% of the total import value to the Middle East in 2021.

Tuna (prepared or preserved, not minced), mackerel (frozen), and herring (frozen) made up the three largest species groups in 2021⁵⁰. Of the total import volume, tuna made up 14%, and mackerel and herring made up 10% and 7%, respectively. Other large species groups were shrimp and prawn (other than coldwater, even smoked, frozen) which accounted for 5% of the total import volume. Gadiformes (nei frozen) and Skipjack tuna (*Katsuwonus pelamis*) (frozen) each made up 3% of the total import volume in 2021. Tuna, shrimp and prawn, and Atlantic (*Salmo salar*) and Danube (*Hucho hucho*) salmon (fresh or chilled) were the three largest species in terms of value, accounting for 35% of the total import value in 2021. The import statistics show that there is a large variety in the fishery and aquaculture products consumed in the Middle East.

Table 30. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO THE MIDDLE EAST BY TRADE PARTNER (volume in tonnes, value in 1.000 EUR)**

Trade partner	2019		2020		2021	
	Volume	Value	Volume	Value	Volume	Value
Norway	169.517	485.525	157.946	432.806	197.366	571.951
Thailand	167.539	500.763	155.008	470.505	136.071	420.303
Morocco	148.643	172.865	123.913	136.131	121.552	132.513
Viet Nam	90.141	234.197	66.341	171.995	74.570	181.172

⁴⁸ Re-exports excluded.⁴⁹ Yearly Currency Exchange rates. European Central Bank.⁵⁰ Fishmeals nei made up 13% of the total import volume to the Middle East in 2021.

India	66.582	278.251	54.010	231.416	60.803	248.950
Myanmar	62.710	68.364	65.750	70.836	57.841	62.019
China	123.453	285.619	48.964	147.214	47.635	153.709
The Netherlands	196.352	231.983	188.505	177.631	43.448	77.807
Spain	67.657	88.461	77.304	92.837	33.479	74.299
Indonesia	27.360	101.937	32.673	112.581	26.646	83.935
Other	412.336	1.045.755	378.062	884.185	321.396	910.079
Total	1.532.290	3.493.720	1.348.476	2.928.137	1.120.807	2.916.738

Source: FAO

4.3. Trade flows in the EU

The EU currently has several agreements in place with countries in the Middle East, both multilateral and bilateral. The EU participates in multilateral agreements through the Euro-Mediterranean Partnership (Euromed), which includes the Gulf Cooperation Council (GCC) and the Union for the Mediterranean (UfM). The Gulf Cooperation Council consists of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates. The EU – GCC relations are based on a Cooperation Agreement from 1988, and this agreement provides a framework for political and economic cooperation between the GCC countries and the EU. It forms regular dialogue regarding cooperation between the GCC and the EU on trade and investment, but also other important topics such as climate change, the environment, energy, research, and macro-economic matters. The GCC is EU's 6th largest export market⁵¹. For the GCC, the EU is the 2nd largest trade partner. In 1990, the EU and the GCC began negotiations for a Free Trade Agreement (FTA). However, in 2008, the negotiations were suspended as they faced several challenges.

In terms of bilateral agreements, the EU has Association Agreements in place with Egypt, Israel, Jordan, Lebanon and Palestine (interim). The EU and Turkey holds an Association Agreement (1963) and a Customs Union Agreement (1995). Iraq and the EU have a Partnership and Cooperation Agreement (PCA) that has provisionally been in force since 2018. The basis for trade relations between the EU and Syria is a Cooperation Agreement signed in 1977, although trade relations between the EU and Syria have been impacted by the war in Syria since the outbreak of the war in 2011. Due to this, the EU suspended all its bilateral cooperation with the Government of Syria. The EU holds limited or no formal agreements with the Islamic Republic of Iran. Economic relations between the EU and the Islamic Republic of Iran are heavily influenced by broader geopolitical factors and various sanctions regimes.

EU export of fishery and aquaculture products to the Middle East

In 2023, the EU exported 128.907 tonnes of fishery and aquaculture products at a value of EUR 388 million to the selected Middle Eastern countries⁵². Compared to 2022, this was a decrease of 13% in volume and a 13% decrease in value. Compared to the three-year average before the pandemic (2017-2019), this was a 32% decrease in export volume and a 22% decrease in export value.

In 2023, Egypt was the largest export country for aquaculture and fisheries products in terms of volume from the EU with 63.670 tonnes at a value of EUR 83,7 million. This was a decline of 23% and 24% in terms of volume and value and is largely attributed to a drop in catches of Atlantic horse mackerel (*Trachurus trachurus*) which declined by 72% from 2022. Turkey was the second largest export market in 2023 with a volume of 26.977 tonnes at a value of EUR 53 million. Israel was the third largest export market in 2023 with a volume of 16.647 tonnes at a value of EUR 120 million. Israel represents the largest market in terms of value due to its large market for salmon with 4.584 tonnes (2023).

Herring (26%) and skipjack tuna (14%) accounted for the biggest volumes exported to the Middle East from the EU in 2023 with a volume of 33.207 tonnes and 17.836 tonnes, respectively. This was followed by mackerel (11%), Atlantic horse

⁵¹ European Commission. Gulf region. europa.eu

⁵² EUMOPA elaboration of Eurostat-Comext data.

mackerel (8%) and other non-food use (5%). Salmon, skipjack tuna and herring were the three most valuable products exported.

Egypt was the largest market for herring in 2023 with 97% of the total volume, followed by Israel (2%). For skipjack tuna, Turkey was the largest market with 78% of the total export volume. The United Arab Emirates and Saudi Arabia were the second and third largest markets with 11% and 5% of the total volume, respectively. For mackerel, Egypt was again the largest market with 92% of the total volume exported, followed by Israel with 4%.

Table 31. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM THE EU TO THE MIDDLE EAST BY MAIN COMMERCIAL SPECIES (volume in tonnes, value in 1.000 EUR)**

MCS	2019		2020		2021		2022		2023	
	Volume	Value								
Herring	54.350	40.156	55.543	43.257	29.060	23.964	25.049	25.440	33.207	34.493
Tuna, skipjack	12.106	29.603	10.054	29.894	10.179	28.260	10.092	30.013	17.836	46.717
Mackerel	15.563	22.629	29.607	41.879	19.906	27.877	14.955	27.096	13.817	23.468
Horse mackerel, Atlantic	53.748	50.273	39.552	40.374	32.431	38.371	36.962	50.501	10.412	15.085
Other non-food use	10.375	11.398	13.554	10.505	12.396	13.112	9.865	15.979	6.715	12.565
Other	42.942	174.462	46.987	175.647	52.710	221.011	50.555	292.756	46.920	256.181
Total	189.084	328.521	195.297	341.556	156.682	352.596	147.477	441.784	128.907	388.510

Source: EUMOFA elaboration of Eurostat-Cormext data.

EU imports from the Middle East

In 2023, the EU imported 146.855 tonnes of fishery and aquaculture products from the Middle East at a value of EUR 830 million. Compared to 2022, this was an increase of 10% in volume and 9% in terms of value. Compared to the three-year average before the pandemic (2017-2019), this was a 55% decrease in import volume and an 85% decrease in import value.

The largest suppliers to the EU market in 2023 were Turkey, Oman and Yemen. In 2023, the EU imported 121.642 tonnes of fishery and aquaculture products from Turkey which was by far the largest supplier to the EU market. The EU imported 18.915 tonnes and 4.174 tonnes from Oman and Yemen, respectively. From Turkey, gilthead seabream (33%), other marine fish (21%), European seabass (18%), and trout (13%) made up the four largest imported species group in 2023.

The EU mainly imported gilthead seabream (28%), other marine fish (20%), European seabass (15%), and trout (10%) from the Middle East in 2023. These main commercial species also accounted for most of the value (80%). Gilthead seabream and European seabass were mainly imported as fresh or chilled (94% and 97% of the total, respectively)⁵³. Of other marine fish, most of this category was made up of fresh or chilled fish fillets, however, the species name remains unspecified. For trout, 40% of the total import volume was frozen whole, 24% was smoked, and 18% was frozen fillets⁵⁴.

Italy was the EU country with the largest import volume in 2023 with 34.074 tonnes and a value of EUR 203,86 million. The second and third largest import markets in the EU were the Netherlands and Greece with 21.362 tonnes and 21.113 tonnes, respectively. Italy imported mostly gilthead seabream (35%), other marine fish (25%) and European seabass (20%) in 2023. In the Netherlands and Greece, gilthead seabream, other marine fish and European seabass were also the three largest imported fishery and aquaculture products in 2023.

⁵³ Fresh or chilled gillt-head sea bream "*Sparus aurata*". Fresh or chilled European sea bass "*Dicentrarchus labrax*".

⁵⁴ Frozen fillets of trout "*Salmo trutta*", *Oncorhynchus mykiss*, *Oncorhynchus clarki*, *Oncorhynchus aguabonita* and *Oncorhynchus gilae*" (excl. of *Oncorhynchus mykiss* weighing > 400 g each)

Table 32. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO THE EU FROM THE MIDDLE EAST BY MAIN COMMERCIAL SPECIES (volume in tonnes, value in 1.000 EUR)**

MCS	2019		2020		2021		2022		2023	
	Volume	Value								
Gilthead seabream	36.355	141.105	37.835	148.678	43.159	167.237	37.639	170.841	40.668	187.144
Other marine fish	24.307	172.061	24.541	175.591	27.173	198.734	28.609	244.146	29.337	245.798
European seabass	26.816	101.397	23.807	99.789	21.100	100.273	20.281	117.044	22.310	121.329
Trout	13.263	65.462	12.276	60.267	12.527	60.193	13.660	77.033	15.359	106.159
Yellowfin tuna	1.399	5.612	130	628	183	590	2.007	5.732	2.816	8.111
Other	33.870	104.316	27.828	85.759	24.094	99.606	31.007	144.680	36.365	161.754
Total	136.011	589.953	126.417	570.712	128.238	626.633	133.203	759.476	146.855	830.294

Source: EUMOFA elaboration of Eurostat-Comext data.

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5. Hake in the EU

Hake is one of the most valuable white fish species in the EU market. It is caught by the EU fleet (mainly Spanish and French vessels), mostly in the Atlantic. In 2022, landings of hake in the EU reached 135.270 tonnes at a value of EUR 435 million, with Spain accounting for more than 71% of the total volume. The EU market supply is also supplemented by significant imports of frozen hake, mostly from Namibia, Argentina and South Africa. Spain is the main consumption market for hake products in the EU and is a hub for extra-EU imports of frozen hake.

5.1. Biology exploitation and management

Hakes are members of the family Merlucciidae, which includes numerous species around the world. The most commercially important are Argentine hake, North Pacific hake, Cape hake and South Pacific hake. The European hake, *Merluccius merluccius*, is the most commonly found in Europe and represented 8% of the volume of world catches in 2022.



The European hake⁵⁵ is a benthopelagic demersal fish that lives on muddy or muddy-sandy bottoms of the continental shelf and slope between 70 and 400 metres.⁵⁶ It is a nocturnal hunter that returns to the depths during the day. This vertical migration is also coupled with two other migrations: coastal-offshore and north-south in the Bay of Biscay. It feeds mainly on fish (blue whiting, anchovy, sardine, etc.) and crustaceans.

The European hake is a light grey fish with a large mouth and sharp teeth. Measuring between 30 cm and 1 metre, males reach sexual maturity at the age of 5 years (26 cm), while females mature at 7 years (36-40 cm). The spawning period is long and varies according to the population: in the Mediterranean, it fluctuates between December and June; from February to May in the Bay of Biscay; from April to July in Iceland; and from May to August west of the British Isles. The common hake is predominantly fished during the spring season in the Bay of Biscay and in the summer in the seas of Scotland and Ireland⁵⁷.

Hake, as well as other fish species such as cod, sardine, halibut and mackerel, are increasingly parasitized by *Anisakis simplex*. This parasite, of the order Ascaridida, can cause anisakiasis in humans when contaminated raw fish is ingested. It can cause inflammation of the gastrointestinal mucosa.

Hake is fished using bottom trawls as well as nets and longlines. EU fisheries catching hake are managed through TACs and quotas set based to the ICES advice for six stocks: HKE/03A, HKE/04-N, HKE/2AC4-C, HKE/571214, HKE/8ABDE, HKE/8C3411. In the Mediterranean, hake fisheries are managed by a multi-annual management plan which provides for the implementation of time-area closures in certain areas to protect juvenile and breeding hake, as well as a reduction in fishing effort (there are no catch limits for hake in the Mediterranean). Minimum catch sizes are also enforced in all fishing areas: Northeast Atlantic: 27 cm; Skagerrak-Kattegat: 30 cm; Mediterranean: 20 cm⁵⁸.

5. 2. Production

GLOBAL PRODUCTION

Global production of hake reached 1,23 million tonnes in 2022. It was mostly caught in the Southwest Atlantic (34%) and to a lesser extent in the Northeast Pacific (24%). The main species caught were Argentine hake (33% of the total), North Pacific hake (26%), Cape hake (21%) and to a lesser extent European hake (8%) and South Pacific hake (6%). The main producers were Argentina (23%), the USA (22%), the EU-27(16%) and Namibia (11%). Other major producers were South Africa, Chile, Canada and Peru. Hakes are not farmed in aquaculture.

⁵⁵https://fish-commercial-names.ec.europa.eu/fish-names/species/merluccius-merluccius_en

⁵⁶ https://peche.ifremer.fr/content/download/29801/411368/file/fiche%20detaillee%20lorient_merlu_2006.pdf

⁵⁷<https://doris.ffesm.fr/Especies/Merluccius-merluccius-Merlu-commun-2643>

⁵⁸ https://fish-commercial-names.ec.europa.eu/fish-names/species/merluccius-merluccius_fr#ecl-accordion-header-prod-gears

Over the last decade (2012-2021), the global production of hake increased by 2%, though with some interannual fluctuations. There was a slight increase in catch from 2013 to 2017, mostly due to North Pacific hake, and total catches have been decreasing since then.

Table 33. **WORLD CATCHES OF HAKE (volume in 1.000 tonnes live weight)**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Argentina	278	263	269	286	283	271	315	273	291	285
USA	242	273	163	270	361	274	324	255	229	268
EU 27	159	198	200	206	196	200	220	180	200	195
Namibia	147	122	143	156	157	158	152	122	130	135
South Africa	129	143	139	143	132	126	133	143	152	116
Others	245	223	206	263	305	306	286	267	266	229
Total	1.200	1.222	1.120	1.324	1.434	1.335	1.430	1.240	1.268	1.228

Source: FAO and Eurostat

EU PRODUCTION

In 2022, EU catches of hake reached 194.684 tonnes. Most of these catches occurred in the Southwest Atlantic (52%, caught exclusively by the Spanish distant fleet) and in the Northeast Atlantic (33%). Mediterranean Sea accounted for 7% of total EU catches. Argentine hake accounted for 52% of EU catches in 2022, and European hake 41%. The main EU producers were by far Spain (74% of the total EU catch) and France (15%). Other significant producers were Italy and Greece (respectively 3% and 2%). Over the last decade (2023-2022), EU catches experienced a strong increase (+33%) due to the increase of Argentine hake catches (+147%) while catches of European hake decreased slightly (-9%).

Table 34. **EU CATCHES OF HAKE (volume in tonnes live weight)**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Spain	88.800	115.389	110.647	111.417	105.243	120.895	148.415	125.304	148.636	142.966
France	32.348	41.411	43.723	45.435	45.259	39.782	34.692	30.427	28.763	29.629
Italy	9.767	8.735	8.994	8.258	7.598	7.303	7.050	5.931	5.998	6.290
Greece	4.694	3.135	3.255	3.696	3.962	4.031	4.429	4.323	3.526	4.161
Denmark	3.140	3.034	3.981	4.440	4.763	4.094	3.129	3.807	3.358	3.610
Others	20.346	26.569	29.156	32.512	29.507	23.492	21.803	10.133	9.684	8.027
Total	159.096	198.274	199.755	205.757	196.332	199.597	219.518	179.927	199.965	194.684

Source: EUROSTAT.

In 2022, landings of hake in the EU-27 amounted to 135.270 tonnes for a value of EUR 435 million. Most of these landings occurred in Spain (71% of the total volume). Other main landing countries were France (8%) and Ireland (7%) (Most landings include fresh fish (76%). Frozen hake account for a quarter (24%) of EU landings, mostly occurring in Spain. Over the 2013-2022 period, EU landings increased by 19%, due mostly to increased landings in Spain (+48%).

Table 35. **LANDINGS OF HAKE IN THE EU (volume in tonnes net weight)⁵⁹**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Spain	64.670	78.748	73.294	76.522	73.403	98.083	103.721	89.052	100.043	95.933
Ireland	13.619	19.149	17.310	24.987	17.929	16.605	16.150	18.251	15.323	9.743
France	13.484	16.318	16.743	16.527	15.568	14.506	12.180	10.179	10.364	11.592
Italy	9.767	8.736	8.994	8.258	7.598	7.301	7.040	5.931	5.985	6.276
Greece	4.694	3.135	3.255	3.696	3.962	4.031	4.429	4.324	3.526	4.162
Denmark	3.685	4.171	5.754	5.881	5.697	5.484	3.841	3.160	2.778	3.002
Portugal	2.779	2.380	2.004	1.976	1.525	1.559	2.009	2.169	3.535	2.825
Others	1.358	1.204	1.599	1.622	1.436	4.497	1.763	1.624	1.510	1.738

5. 3. First sales in the EU

In 2023, reported first sales of hake in EU countries⁶⁰ amounted to a volume of 80.529 tonnes and a value of EUR 312 million⁶¹. The main countries in terms of first-sales volume and value was by far Spain (72% of total volume and 70% of the value), followed by France (13% of the total volume and 12% of the total value) and Italy (6% of the total volume and 7% of total value). Most of first sales consist of whole fresh hake (90% in volume). In 2023, first sales decreased by 3% in volume compared to 2022.

In 2023, the most important places of sale⁶² for hake in volume terms were: Cillero, Burela, Pasajes in Spain (19%, 15%, and 13% of the total volume in Spain, respectively); St Jean-de-Luz, Lorient, Les sables-d'Olonne and La Rochelle in France (26%, 18%, 11% and 7% of the total volume in France, respectively), Monopoli, Pescara, San Benedetto and Civita Marche in Italy (8%, 7%, 6% and 6% of the total volume in Italy, respectively).

In **Spain**, over the 2021-2023 period, monthly first sales of hake peaked at approximately 9.517 tonnes in November 2021 and reached their lowest level at 3.451 tonnes in July 2022. Monthly prices of hake fluctuated between 2,72 and 5,30 EUR/kg.

In **France**, over the 2021-2023 period, monthly first sales of hake peaked at approximately 1.550 tonnes in February 2023 and reached their lowest level at 400 tonnes in December 2023. Monthly prices of hake fluctuated between 2,43 and 5,12 EUR/kg.

In **Italy**, over the 2021-2023 period, monthly first sales of hake peaked at approximately 565 tonnes in October 2022 and reached their lowest level at 183 tonnes in August 2021. Monthly prices of hake fluctuated between 3,75 and 7,08 EUR/kg.

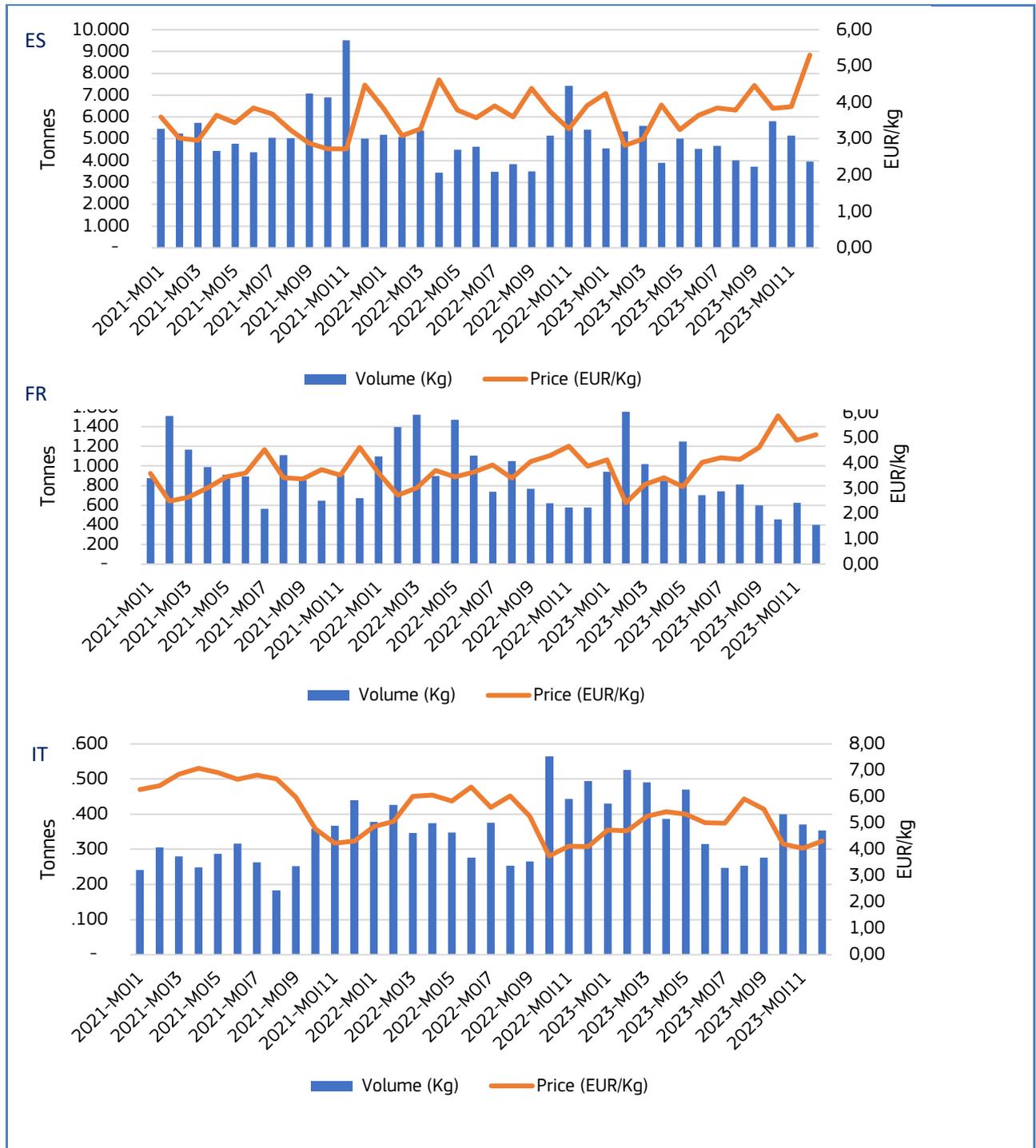
⁵⁹ Totals do not correspond exactly to actual sums because of roundings.

⁶⁰ France, Spain, Italy, Ireland, Greece, Portugal and Cyprus;

⁶¹ Source: EUMOFA.

⁶² Places of sale for Ireland are not available.

Figure 52. **WORLD FIRST SALES: HAKE IN SPAIN, FRANCE AND ITALY (VOLUME IN TONNES NET WEIGHT AND PRICE IN EUR/KG)**



5. 4. Import – Export

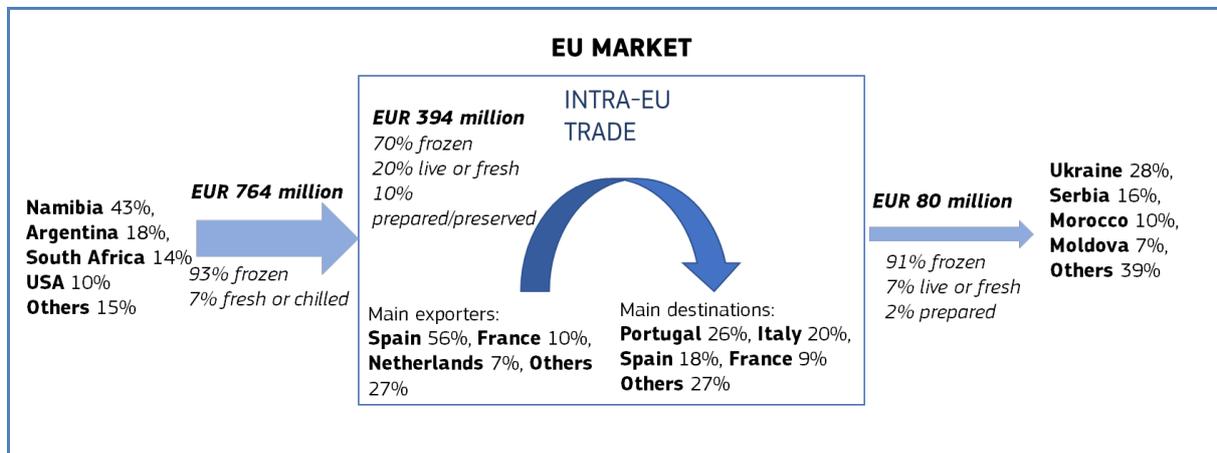
In the Combined Nomenclature used for registering EU import-export data, hake is specifically reported whole or in fillets, as fish meat and as fresh or chilled, frozen and prepared or preserved.⁶³

In 2023, the EU-27 imported 179.742 tonnes of hake at a value of EUR 764 million, mostly frozen. The major providers of hake to the EU market were by far Namibia, accounting for 43% of the extra-EU import value, and to a lesser extent Argentina (18%). They were followed by South Africa and the USA (17% and 12 respectively). Spain was by far the main importer accounting for 55% of the hake extra-EU imports value, followed by Italy (13%) and France (8%).

In the same year, EU exports to third countries were much lower and amounted to 38.386 tonnes at a value of EUR 80 million. Frozen products accounted for 91% of the total extra-EU export value. Fresh or chilled products accounted for 7% of the total extra-EU export value. The main destinations in value terms were the Ukraine (28% of the total value), Serbia (16%), Morocco (10%) and Moldova (7%). Spain was by far the main EU exporter of hake to third countries (76% of the extra-export value), followed by Lithuania (6%) and Portugal (6%).

In 2023, intra-EU exports amounted to 89.922 tonnes of hake products at a value of EUR 394 million. The intra-EU trade was dominated by frozen products which accounted for 70% of the export value, whereas fresh or chilled products only accounted for 20% of the total export value. The main exporting countries within the EU were Spain (56% of the intra-EU export value) and France (10%), followed by Netherlands (7%). Portugal was the main destination of intra-EU exports (26% of intra-EU export value), followed by Italy (20%) and Spain (18%).

Figure 53. THE HAKE TRADE MARKET IN 2023, IN VALUE



Source: EUMOFA elaboration of Eurostat-COMEXT data.

⁶³ 03047411 - Frozen fillets of Cape hake "shallow-water hake" "*Merluccius capensis*" and deepwater hake "deepwater Cape hake" "*Merluccius paradoxus*"
 03047415 - Frozen fillets of Argentine hake "Southwest Atlantic hake" "*Merluccius hubbsi*"
 03047419 - Frozen fillets of hake "*Merluccius* spp." (excl. cape hake, deepwater hake and Argentine hake)
 03049550 - Frozen meat, whether or not minced, of hake "*Merluccius* spp." (excl. fillets and surimi)
 03036611 - Frozen Cape hake "shallow-water hake" "*Merluccius capensis*" and deepwater hake "deepwater Cape hake" "*Merluccius paradoxus*"
 03036612 - Frozen Argentine hake "Southwest Atlantic hake" "*Merluccius hubbsi*"
 03025419 - Fresh or chilled hake "*Merluccius* spp." (excl. cape hake, deepwater hake and southern hake)
 03036613 - Frozen southern hake "*Merluccius australis*"
 03036619 - Frozen hake "*Merluccius* spp." (excl. cape hake, deepwater hake, Argentine hake and southern hake)
 03025411 - Fresh or chilled Cape hake "shallow-water hake" "*Merluccius capensis*" and deepwater hake "deepwater Cape hake" "*Merluccius paradoxus*"
 03025415 - Fresh or chilled southern hake "*Merluccius australis*"
 16041994 - Hake "*Merluccius* spp., *Urophycis* spp.", prepared or preserved, whole or in pieces (excl. finely minced and fillets, raw, merely coated with batter or breadcrumbs, whether or not pre-fried in oil, frozen)
 03025490 - Fresh or chilled hake "*Urophycis* spp."
 03047490 - Frozen fillets of hake "*Urophycis* spp."
 03036690 - Frozen hake "*Urophycis* spp."

5. 4. Consumption

Hake is one of the most popular whitefish in the EU market consumed at home and in restaurants. In 2021, the EU apparent consumption for hake was estimated at 457.110 tonnes live weight equivalent⁶⁴. The main consumption market was by far Spain with 171.701 tonnes lwe of apparent consumption. It was followed by Italy (56.268 tonnes lwe), France (38.970 tonnes lwe) and Portugal (11.240 tonnes lwe).

According to EUROPANEL data, Spanish household consumption of fresh (and chilled) hake amounted to almost 50 thousand tonnes in 2023, a -4% decrease compared to 2022. In Italy, household consumption of fresh hake was stable between 2022 and 2023 and amounted to almost 11 thousand tonnes. In France, household consumption of fresh hake decreased by 21% in 2023 compared to 2022, reaching about 2.500 tonnes.

⁶⁴ <https://eumofa.eu/supply-balance-sheet>

6. Global highlights

EU / EFCA: The European Fisheries Control Agency (EFCA) has implemented its first Joint Deployment Plan (JDP) in the Indian Ocean to coordinate fisheries control activities among Member States, focusing on EU vessels targeting tropical tuna species. This initiative, supported by a specific control and inspection programme (SCIP), involves France, Italy, and Spain in inspecting landings of yellowfin, bigeye, and skipjack tuna. EFCA facilitates data exchange, joint risk management, and the deployment of Union inspectors to enhance oversight and compliance. EFCA is also conducting a workshop under the ECOFISH programme with the Indian Ocean Commission to strengthen fisheries management through technical support and collaboration among nine countries in the region⁶⁵.



FAO: The recently published State of World Fisheries and Aquaculture (SOFIA) 2024 reveals that world fisheries and aquaculture production reached 223,2 million tonnes in 2022, a 4% increase from 2020, with aquaculture (without algae), surpassing capture fisheries in aquatic animal production for the first time⁶⁶. The report highlights the need for further transformative actions to enhance sustainability, efficiency and inclusiveness in aquatic food systems. The report also projects continued growth in production and consumption, emphasizing the critical role of effective management and sustainable practices to address global food security, malnutrition and poverty⁶⁷.

Italy / FLAG: Scientists from Cagliari University, Sardinian fishers and Fisheries Local Action Groups, supported by the European Maritime and Fisheries Fund, collaborated to remove over two tonnes of marine litter from Sardinian waters. The project combined scientific monitoring with active clean-up efforts, engaging fishers of all sizes. Over six months, 136 trips were carried out, collecting 2.400 kg of litter. The initiative created a replicable model for other regions, increased fishers' capacity for monitoring marine litter, and highlighted the importance of community involvement in protecting marine biodiversity. This project sets the stage for future collaboration between scientists and fishers for a cleaner ocean⁶⁸.

EU / BBNJ: The Commission welcomed the Council's decision to adopt the UN agreement on Biodiversity Beyond National Jurisdiction (BBNJ), also known as the "High Seas Treaty," and is prepared to ratify it before the next UN Ocean conference in June 2025. The treaty, which will enter into force after 60 ratifications, will establish shared governance of over half of the earth's surface and 95% of the oceans, enabling the creation of marine protected areas to address climate change, protect biodiversity, and achieve the goal of protecting 30% of the planet by 2030 from human pressure. Currently, only 1% of the high seas is protected. The EU has pledged to support implementation of the treaty, especially in developing countries, through the EU Global Ocean Programme and has called other donors to contribute⁶⁹.

EU / Funding: On June 12, the European Commission initiated two consultations to evaluate the effectiveness of funding programmes for fisheries and maritime activities. The first consultation, open until September 6, 2024, seeks input on the European Maritime and Fisheries Fund (EMFF) for 2014-2020 and the current European Maritime, Fisheries and Aquaculture Fund (EMFAF) for 2021-2027. A second consultation with a questionnaire will follow in order to gather feedback from stakeholders. These consultations aim to assess how the funds have supported EU strategies for sustainable growth. During recent economic crises, both funds provided substantial support to mitigate COVID-19 and energy price shocks, assisting thousands of affected businesses across the EU.

Norway / Fishery: The 2025 quota advice for North-East Arctic cod, haddock, Greenland halibut, and Atlantic/beaked redfish recommends significant reductions, creating concern in Norway's fishing industry. The North-East Arctic cod quota recommendation of 311.587 tonnes represents a 31% decrease from both the previous year's recommendation and the fixed quota for 2024, which is the lowest in over 20 years due to declining spawning populations. Haddock faces a 24% reduction to 106.912 tonnes, reflecting challenges from weak recent year classes. A sharp decline is also advised for Greenland halibut to 12.431 tonnes, 42% lower than the 2024 quota, and 20% lower than the previous advice. Final quotas will be decided in autumn, following negotiations between Norwegian and Russian authorities⁷⁰.

⁶⁵ <https://www.efca.europa.eu/en/node/659>

⁶⁶ Total global aquaculture production (including aquatic animals and algae) exceeds global fisheries production since 2013.

⁶⁷ <https://www.fao.org/newsroom/detail/fao-report-global-fisheries-and-aquaculture-production-reaches-a-new-record-high/en#:~:text=The%202024%20edition%20of%20The,37.8%20million%20tonnes%20of%20algae>

⁶⁸ https://oceans-and-fisheries.ec.europa.eu/news/turning-tide-how-sardinian-fishers-are-cleaning-their-seas-2024-06-26_en

⁶⁹ https://oceans-and-fisheries.ec.europa.eu/news/eu-ready-ratify-high-seas-treaty-2024-06-17_en

⁷⁰ <https://thefishingdaily.com/latest-news/dramatic-31-cut-in-north-east-arctic-cod-catch-recommended/>

7. Macroeconomic Context

7.1. Marine fuel

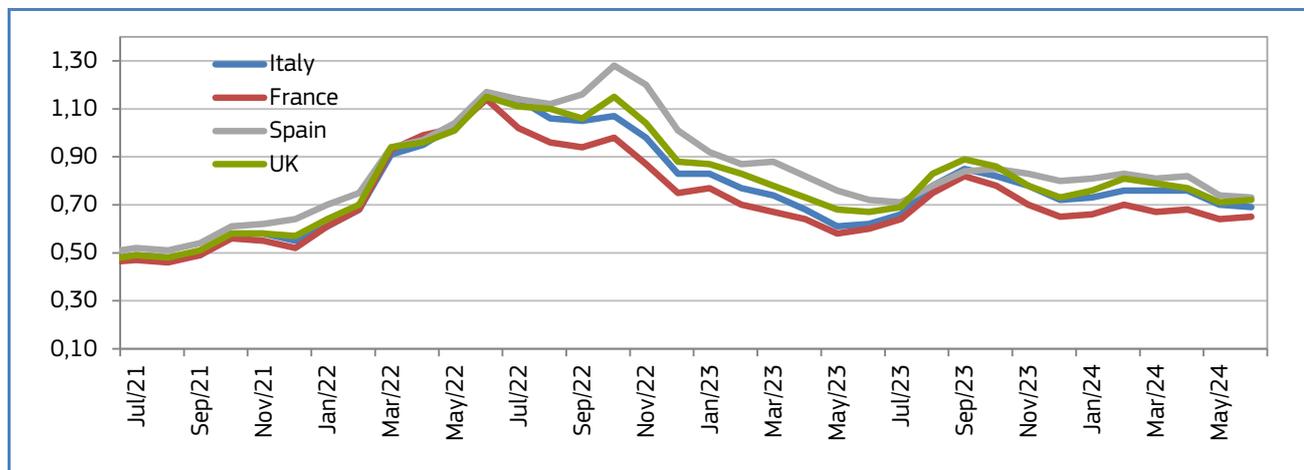
Average prices for Marine fuel in **June 2024** ranged between 0,65 and 0,73 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices were stable compared with the previous month and increased by an average of 6,9% compared with the same month in 2023.

Table 36. **AVERAGE PRICE OF MARINE DIESEL IN FRANCE, ITALY, SPAIN, AND THE UK (EUR/litre)**

Member State	June 2024	Change from May 2024	Change from June 2023
France <i>(ports of Lorient and Boulogne)</i>	0,65	2%	8%
Italy <i>(ports of Ancona and Livorno)</i>	0,69	-1%	11%
Spain <i>(ports of A Coruña and Vigo)</i>	0,73	-1%	1%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,72	1%	7%

Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

Figure 54. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**



Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

7.2. Consumer prices

The EU annual inflation rate in May 2024 was 2,7%, up from 2,6% in April 2024. A year earlier, the rate was 7,1%.

Inflation: lowest rates in May 2024, compared with April 2024.



Inflation: highest rates in May 2024, compared with April 2024.



Table 37. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

	May 2022	May 2023	Apr 2024	May 2024	Change from Apr 2024		Change from May 2023	
Food and non-alcoholic beverages	122,38	140,78	142,84	143,08	↑	0,2%	↑	1,6%
Fish and seafood	125,39	138,99	141,65	141,87	↑	0,2%	↑	2,1%

Source: Eurostat.

7.3. Exchange rates

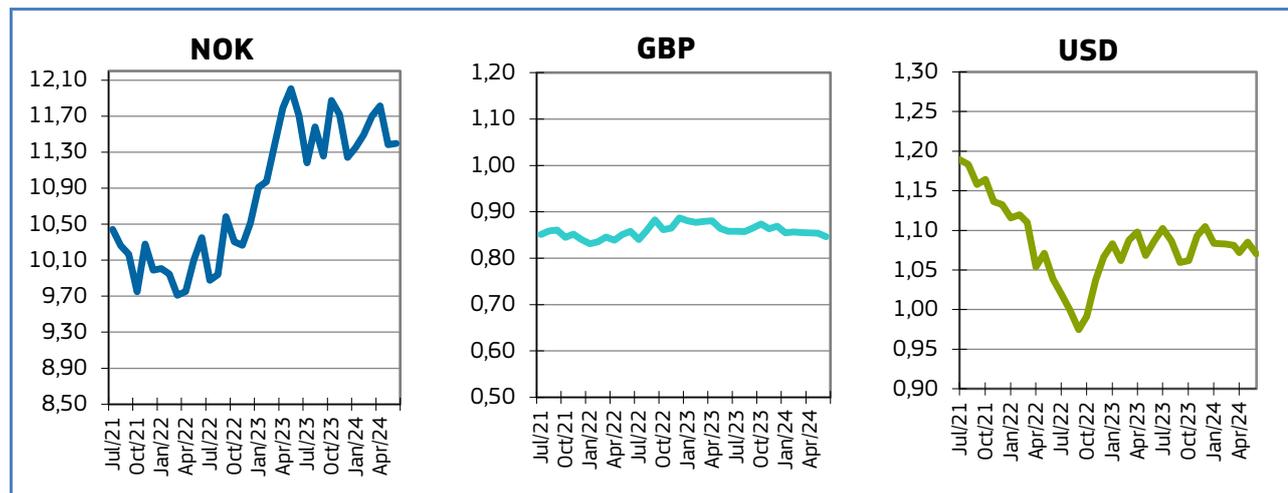
Table 38. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	June 2022	June 2023	May 2024	June 2024
NOK	10,3485	11,7040	11,3830	11,3965
GBP	0,8582	0,8583	0,8537	0,8464
USD	1,0387	1,0866	1,0852	1,0705

Source: European Central Bank.

In June 2024, the euro depreciated against the US dollar (1,4%) and the British pound sterling (0,9%) and appreciated against the Norwegian krone (0,1%) relative to the previous month. For the past six months, the euro has fluctuated around 0,8535 against the British pound sterling. Compared with June 2023, the euro has depreciated 1,5% against the US dollar, 2,6% against the Norwegian krone and 1,4% against the British pound sterling.

Figure 55. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

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This report has been compiled using EUMOFA data and the following sources:

First sales: EUR-lex, ICES, Ouest France, European Commission, FAO, Lovdata, Marine Species Identification Portal, ResearchGate, FishSource, Pescare.

Consumption: FishBase.

Case studies: FAO, Aquatic ecology series – Springer, Share America, Arab News, Union for the Mediterranean, Union of Arab Chambers, World Bank, European Central Bank, European Commission, EUROSTAT, Le Marin. Données d'Observations pour la Reconnaissance et l'Identification de la faune et la flore Subaquatiques, Ifremer.

Global highlights: The Directorate-General for Maritime Affairs and Fisheries (DG MARE), The Fishing Daily, EFCA, FAO.

Macroeconomic context: EUROSTAT, Chamber of Commerce of Forlì-Cesena, Italy: DPMA, France: ARVI, Spain: MABUX, European Central Bank.

The underlying first-sales data are in an annex available on the EUMOFA website. Analyses are made at aggregated (main commercial species) level and according to the EU Electronic recording and reporting system (ERS).

In the context of this Monthly Highlight, analyses are led in current prices and expressed in nominal values.

The **European Market Observatory for Fisheries and Aquaculture Products (EUMOFA)** was developed by the European Commission, representing one of the tools of the new Market Policy in the framework of the reform of the Common Fisheries Policy. [Regulation (EU) No 1379/2013 art. 42].

As a **Market intelligence tool**, EUMOFA provides regular weekly prices, monthly Market trends, and annual structural data along the supply chain.

The database is based on data provided and validated by Member States and European institutions. It is available in 24 languages.

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