



European Commission



No. 7/2017

E U M O F A

European Market Observatory for Fisheries and Aquaculture Products

MONTHLY HIGHLIGHTS

CONTENTS

First sales in Europe

Focus on John dory (France, Italy, Portugal) and turbot (Belgium, Denmark, the UK)

Global Supply

Case studies: Haddock in the EU; Fisheries and aquaculture in India

Consumption: Whiting in France

Macroeconomic context

In this issue

In January–May 2017, first-sales value increased in France, Latvia, Norway, and Portugal over January–May 2016. First-sales value of sole increased in Denmark and Portugal; it decreased in Belgium, France, Italy, and the UK. Sardine first-sales volume decreased substantially in Italy and increased in France, Greece, Portugal, and the UK. In May 2017, monk first-sales prices decreased in Denmark, France, and the UK from May 2016. At the same time, prices of cod increased in Denmark, Latvia, Sweden, and the UK, and decreased in Norway.

In January–May 2017, John dory average unit prices increased in Italy (+4%) and Portugal (+3%) and decreased slightly in France, compared with January–May 2016. Turbot first-sales average prices decreased in all surveyed countries: Belgium (-15%), Denmark (-11%), and the UK (-9%) from the same period.

In 2016, the Italian fleet landed 188.000 tonnes of fish with a value of EUR 904 million. The most valuable species were shrimp (EUR 148 million), hake (EUR 67 million), anchovy (EUR 56 million), cuttlefish (EUR 54 million), and octopus (EUR 48 million).

In 2016, the EU imported various haddock products at a value of EUR 210 million and 70.000 tonnes. This was a decrease in value (-8%) from 2015, but an increase in volume (+9%). The EU depends strongly on importing haddock to fulfil domestic demand, achieving just 30% self-sufficiency through its own catches.

In 2016, the EU imports of Indian seafood reached EUR 943 million and 183.000 tonnes. The most valuable imported species were tropical shrimp and squid. The main EU destinations for Indian seafood were Spain, Italy, the UK, and France.

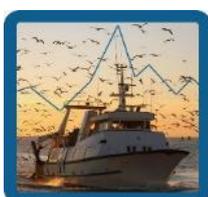
In January–April 2017, the retail price of fresh whiting for household consumption in France was around 13 EUR/kg and grew 12% over January–March 2016.

Find data, information, and more at:

www.eumofa.eu

Follow us on twitter:

@EU_MARE #EUMOFA



1. First sales in Europe

In **January–May 2017**, ten EU Member States and Norway reported first-sales data for 11 commodity groups¹. Compared with January–May 2016, first sales increased in both value and volume for Latvia and Norway. They experienced an opposite trend for Belgium, Italy, Sweden, and the UK.

In **Belgium** in **January–May 2017**, first sales decreased in both value (–10%) and volume (–9%), from January–May 2016. The main factors in the decrease were the drop in first-sales value and volume for cuttlefish (–24% in value, –47% in volume), plaice (–16% in value, –15% in volume), and sole (–21% in value, –13% in volume). In **May 2017**, first-sales value increased substantially for monk (+57%) over May 2016. They decreased for sole (–8%) and plaice (–16%). Plaice also experienced the largest decrease in volume (–18%). Of the most valuable species, the average price increased for plaice (+2%) and decreased for monk (–7%) and sole (–10%).

In **Denmark** in **January–May 2017**, first sales decreased in value and increased in volume compared with January–May 2016. First sales of Norway lobster (–24%), plaice (–11%), saithe (–12%), and shrimp *Crangon* (–38%) were the main contributors to the decrease in value. Herring (+18%) and cockle (+93%), which account for 95% of the volume of “other molluscs and aquatic invertebrates” caused the increase in volume. In **May 2017**, first sales decreased in both value and volume (–12% and –16%, respectively) from May 2016. The decrease in value was caused mainly by herring (–68%), plaice (–24%), shrimp *Crangon* (–25%), and saithe (–18%); herring (–55%) was the main contributor to the decrease in volume, as was plaice (–21%). Among the main species, average prices increased for cod (+2%), shrimp *Crangon* (+24%), and sole (+4%), and decreased for herring (–28%), Norway lobster (–13%), and saithe (–26%).

In **January–May 2017**, **Estonia** experienced decreases in both first-sales value and volume from the same period a year before. Herring (–5% in both value and volume) and sprat (–27% in value, –24% in volume) were responsible for the decreases. In **May 2017**, the trend was reversed; first-sales value and volume increased 15% and 9%, respectively, over May 2016. The increases were also caused by herring and sprat. In addition, volume increased because of European perch (+3%). Except for herring (+11%), average prices of the European perch and sprat experienced an opposite trend: –10% and –23%, respectively.

In **France** in **January–May 2017**, first-sales value increased slightly (+1%), whereas volume decreased 2%, compared with January–May 2016. Squid had the greatest increase in value (+69%), followed by scallop (+11%), sardine (+52%), and monk (+5%). Cuttlefish (–31%), whiting (–16%), red mullet (–41%), and gurnard (–21%) experienced the highest volume decreases. In **May 2017**, both first-sales value and volume decreased from May 2016. The decrease in value was mostly linked to cod (–29%), hake (–18%), ling (–23%), sole (–17%), and whiting (–12%), whereas the decrease in volume was attributable to cuttlefish (–47%), hake (–15%), sardine (–14%), and whiting (–20%). Among the top species landed, except for cuttlefish (+56%), prices decreased for European seabass (–9%), hake (–3%), monk (–8%), Norway lobster (–7%), and sole (–11%).

In **January–May 2017**, **Greece** experienced a slight decrease in first-sales value (–1%) and a 4% increase in volume compared with the same period a year before. Anchovy (–6%), hake (–11%), picarel (–29%), and swordfish (–80%), were responsible for the decrease in value. Anchovy (+5%), horse mackerel (+37%), red mullet (+19%), and sardine (+6%) were responsible for the increase in volume. In **May 2017**, both first-sales value and volume increased over May 2016. This was caused mainly by red mullet (+9% in value, +30% in volume) and sardine (+19% in value, +9% in volume). Except for sardine (+9%), the prices of main species experienced an opposite trend: anchovy (–6%), hake (–1%), and red mullet (–16%).

In **Italy** in **January–May 2017**, first sales decreased in both value and volume from the same period in 2016. Anchovy (–12%), clam (–33%), sardine (–13%), and squillid (–17%) were the main contributors to the decrease. Clam (–40%) and sardine (–15%) were also the main species responsible for the decrease in volume. In **May 2017**, first-sales value decreased, and volume increased compared with May 2016. Miscellaneous shrimps (–42%), of which giant red shrimp accounts for approximately 80% of the value, and clam (–48%) were the species with the largest decreases in value. Anchovy increased most in volume (+38%). Except for clam (+10%), prices decreased for anchovy (–33%), deep-water shrimp (–19%), giant red shrimp (–8%), and hake (–6%).

Latvia experienced increases in both first-sales value (+6%) and volume (+12%) in **January–May 2017** over January–May 2016. Cod (+59%) was mostly responsible for the value increase, as well as sprat (+5%). Volume increased mainly because of sprat (+16%) and, to a lesser extent, herring (+2%). In **May 2017**, both first-sales value and volume experienced remarkable increases (+55% and +64%, respectively) over May 2016. This was attributable to sprat (+176% in value, +166% in volume). Prices increased for all main species: 24% for cod, 14% for herring, and 4% for sprat.

In **Norway** in **January–May 2017**, first-sales value increased because of cod (+10%), haddock (+25%), and mackerel (+31%). Volume increased mainly because of blue whiting (+17%) and herring (+29%). In **May 2017**, both first-sales value (+1%) and volume (+11%) increased over May 2016. The increase in value was attributable to cod (+17%), ling (+77%), and saithe (+11%). In addition to saithe (+53%) and cod (+20%), volume also increased because of herring (+49%). Prices decreased remarkably for herring and saithe (–58% and –27%, respectively) and, to a lesser extent, for cod (–3%) and Greenland halibut (–6%). They experienced an opposite trend for haddock (+39%) and ling (+40%).

In **Portugal** in **January–May 2017**, first sales increased 13% in value and decreased 5% in volume compared with January–May 2016. This was mainly the result of anchovy, which reached EUR 4,4 million. Octopus (+14%), sole (+13%), and tropical shrimp (+59%) also contributed to the increase. Volume decreased mainly because of mackerel (–29%) and, to a lesser extent, horse mackerel (–5%). In **May 2017**, the decrease from May 2016 in both first-sales value and volume was attributable mainly to horse mackerel (–36% in both

value and volume), and mackerel (–25% in value, –38% in volume). Prices decreased slightly for anchovy and horse mackerel (both –1%), as well as for sardine (–12%). They increased for cuttlefish (+37%), mackerel (+21%), octopus (+49%), and sole (+2%).

In **January–May 2017** in **Spain** (a sample of the 28 most important ports), landings of fresh fish (89.986 tonnes) decreased 1% from January–May 2016². In **May 2017**, Spain landed 18.617 tonnes of fresh fish, 10% less than in May 2016 and 19% more than in May 2015. Of these, 5.899 tonnes were landed in the port of Vigo (–3% and +10% compared with May 2016 and May 2015, respectively).

In **Sweden**, the substantial decrease in both value and volume in **January–May 2017** from January–May 2016 was caused by herring (–41% in value, –48% in volume) and sprat (–43% in value, –36% in volume). In addition, value also decreased because of Norway lobster (–27%) and northern prawn (–22%). The decreases from May 2016 continued in **May 2017**. Values decreased most for herring (–15%), northern prawn (–28%), and Norway lobster (–25%). Higher first-sales volume of sprat (+153%) did not offset the overall decrease in volume caused mainly by herring (–24%). First-sales prices increased for cod (+8%), herring

(+13%), and northern prawn (+2%). They decreased for Norway lobster (–17%) and sprat (–6%).

In the **UK** in **January–May 2017**, several species contributed to lower first sales (both value and volume): blue whiting, crab, hake, mackerel, monk, Norway lobster, saithe, scallop, sole, and whiting. Norway lobster (–25%) and hake (–38%) experienced the largest decrease in value; mackerel (–11%) and scallop (–23%) saw the largest decrease in volume. In **May 2017**, the same trend was confirmed, compared with May 2016. Crab (–40%), monk (–41%), Norway lobster and scallop (both –33%), and saithe (–68%) contributed most to the decrease in value. The decrease in volume was caused mainly by crab, monk, saithe, and scallop. Average prices increased for cod (+6%), haddock (+3%), and scallop (+1%). They decreased for crab and sole (both –8%), monk (–5%), and Norway lobster (–9%).

The most recent first-sales data for **June 2017** available on EUMOFA can be accessed [here](#).

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

Country	January–May 2015		January–May 2016		January–May 2017		Change from January–May 2016	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	7.825	28,53	7.548	28,34	6.863	25,64	–9%	–10%
Denmark	84.439	98,62	75.926	122,39	77.514	119,57	2%	–2%
Estonia	34.699	7,60	32.308	7,37	28.179	6,40	–13%	–13%
France	79.974	266,48	81.063	267,91	79.609	270,76	–2%	1%
Greece	4.647	12,87	5.066	12,98	5.285	12,87	4%	–1%
Italy*	34.832	127,37	32.151	125,92	30.608	118,50	–5%	–6%
Latvia	26.736	6,67	27.140	5,93	30.398	6,30	12%	6%
Norway	1.494.296	1.012,68	1.328.334	1.057,24	1.435.847	1.077,67	8%	2%
Portugal	34.175	66,29	32.448	65,42	30.955	73,91	–5%	13%
Sweden	94.721	40,42	61.902	35,13	35.687	23,89	–42%	–32%
United Kingdom	158.974	278,11	171.000	305,94	147.380	261,78	–14%	–14%

Table 2. MAY FIRST-SALES OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)

Country	May 2015		May 2016		May 2017		Change from May 2016	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.165	4,40	1.189	4,61	1.126	4,62	-5%	0%
Denmark	13.736	18,66	18.802	29,70	15.857	26,03	-16%	-12%
Estonia	7.092	1,52	6.637	1,47	7.010	1,70	6%	15%
France	14.447	49,06	16.562	54,93	15.806	52,81	-5%	-4%
Greece	1.325	3,33	1.259	2,75	1.346	2,93	7%	7%
Italy*	9.046	32,33	8.789	33,95	9.319	33,36	6%	-2%
Latvia	2.695	0,70	2.383	0,56	3.904	0,88	64%	55%
Norway	235.947	141,04	174.073	122,27	192.836	123,04	11%	1%
Portugal	8.437	13,62	11.581	16,08	9.108	15,59	-21%	-3%
Sweden	27.204	10,33	5.990	6,33	5.618	5,30	-6%	-16%
United Kingdom	20.480	48,86	22.936	57,09	16.301	39,67	-29%	-31%

Source: EUMOFA (updated 13.07.2017); volume data is reported in net weight.

*Partial data. First-sales data for Italy covers 229 ports (approximately 50% of the total landings).

1.1. FOCUS ON JOHN DORY AND TURBOT IN SELECTED COUNTRIES

1.1.1. JOHN DORY

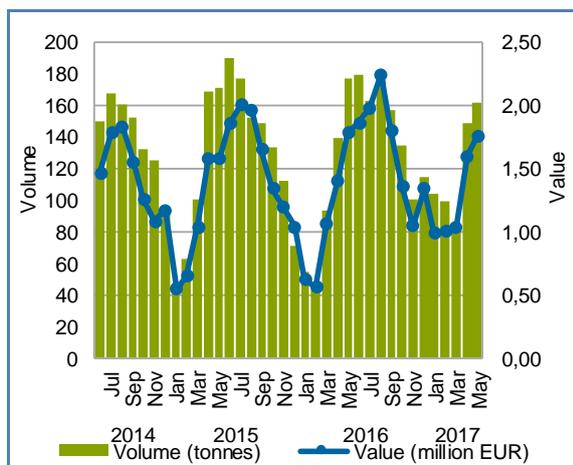
John dory, also known as dory or St Peter's fish, is a demersal species which is highly regarded for human consumption. It is olive-yellow and has a large dark spot and long spines on the dorsal fin. John dory is found in the Eastern Atlantic from Norway to southern Africa, as well as in the Mediterranean and the Black sea, and the western Pacific and Indian oceans. It is a solitary species that lives in soft and muddy areas close to rocks, at depths from 20 m to more than 400 m; however, 99% of catches are made between 20 m and 160 m.

John dory has an average length of 40 cm, and its maximum reported age is 12 years. Reproduction takes place at the end of winter and at the start of spring in the Northeast Atlantic and earlier in the Mediterranean. John dory is an important bycatch in various trawl fisheries in the Northeast Atlantic. The species is not subject to fishery-management measures, and there are no limits on catches.

On the market, John dory can be found fresh and frozen, whole or filleted. It has a delicate, mild to sweet flavour³.

In France in January–May 2017, first sales of John dory increased in both value and volume (+17% and +18%, respectively) over January–May 2016, and were EUR 6,37 million and 599 tonnes. Compared with January–May 2015, the same trend was maintained: value increased 18% and volume increased 9%. John dory is landed mainly in Brittany, in the ports of Erquy and Le Guilvinec.

Figure 1. JOHN DORY: FIRST SALES IN FRANCE

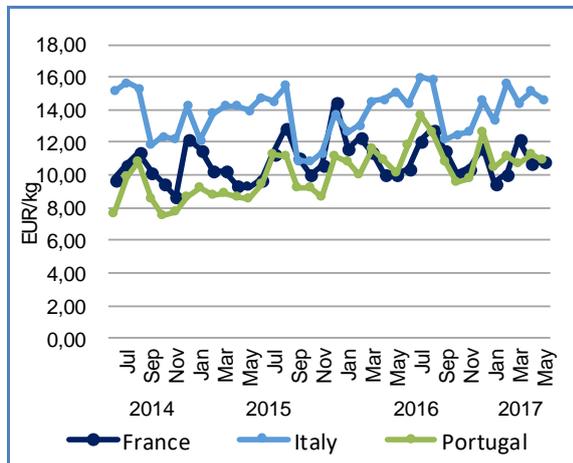


because John dory is served mainly in the food-service sector (restaurants). The highest price registered was in December 2015: 14,50 EUR/kg corresponding to 71 tonnes.

In Italy, prices are approximately 30% higher than in France. They reach the highest values in June–August. The average price spiked in July 2016, ending at 15,98 EUR/kg for 10 tonnes. In January–May 2017, the average price was 14,71 EUR/kg, 4% higher than January–May 2016 and 6% higher than January–May 2015.

Average prices in Portugal are the lowest of the countries surveyed. They reach the highest values in July–August. The highest average price was registered in July 2016, 13,68 EUR/kg, when 26 tonnes were landed. In January–May 2017, the average price was 10,91 EUR/kg, 3% higher than January–May 2016, and 24% higher than January–May 2015.

Figure 4. JOHN DORY: FIRST-SALES PRICE IN SELECTED COUNTRIES



Source: EUMOFA (updated 13.07.2017).

1.1.2. TURBOT



Turbot is a predator species that lives on various bottoms: sandy, rocky, or mixed, imitating the colour of the substrata. It is found from shallow waters to 100 m, and it is common in brackish waters. It feeds mainly on other bottom-living fish (sandeels, gobies) and, to a lesser extent, on crustaceans and bivalves. Turbot is a flatfish with a high growth rate: around 10 cm per year⁴.

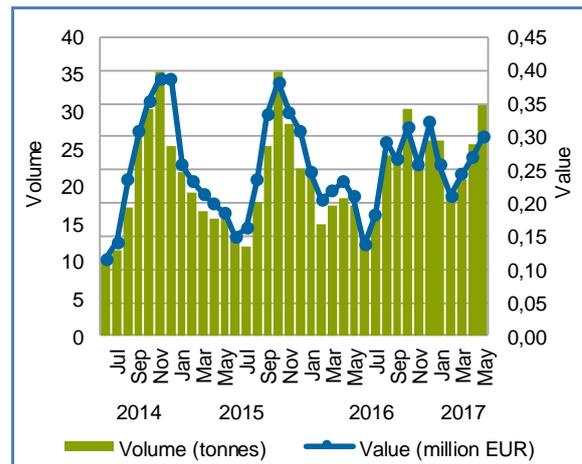
Turbot is distributed in the Northeast Atlantic: throughout the Mediterranean and along the European coasts to the Arctic Circle. It is also found in the Baltic and Black seas. Spawning usually takes place between February and April in the Mediterranean and between May and July in the Atlantic⁵.

Turbot is caught mainly with mid-class and large beam trawlers, which are directed at flatfish. The species is also caught with otter trawls and static nets (gillnets and tanglenets). It is a valuable bycatch species in demersal fisheries. It is a highly prized on the market, where it is found both fresh (mainly whole) and frozen⁶.

Turbot catches are seasonal and are subject to total allowable catches (TACs). In the North Sea, where most turbot catches take place, the species (*Psetta maxima*) is managed together with brill (*Scophthalmus rhombus*) in a shared TAC. In 2017, the combined TAC for the North Sea was 4.937 tonnes, 10% higher than in 2016. There is no TAC in the Baltic Sea, however the multi-annual plan for the stocks of cod, herring, and sprat also applies to turbot when the species is taken as bycatch. In the Black Sea turbot quotas for 2017 are set at 86,4 tonnes and are shared equally by the two riparian Member States, Bulgaria and Romania. In addition, conservation and management measures are in place, to counteract overfishing and to restore the size of the Black Sea turbot stock aimed at ensuring the sustainability of turbot fishery⁷.

In Belgium in January–May 2017, the first sales of turbot were EUR 1,28 million and 123 tonnes. They were higher in both value (+15%) and volume (+36%) than in January–May 2016. Compared with January–May 2015, the trend was maintained: first-sales value and volume increased 18% and 38%, respectively. Turbot is caught year-round, with peaks between September and October, when the supply is abundant.

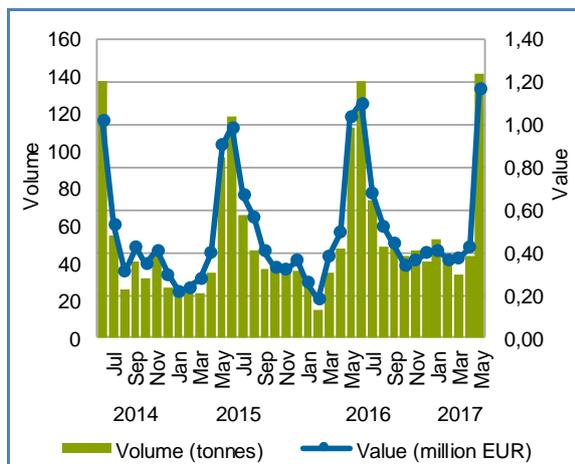
Figure 5. TURBOT: FIRST SALES IN BELGIUM



Source: EUMOFA (updated 13.07.2017).

In Denmark in January–May 2017, the first sales of turbot increased in both value and volume, over January–May 2016, ending at EUR 2,75 million (+17%) and 313 tonnes (+31%). Compared with January–May 2015, the trend was maintained: first-sales value and volume increased 35% and 54%, respectively. Most catches take place in May–June.

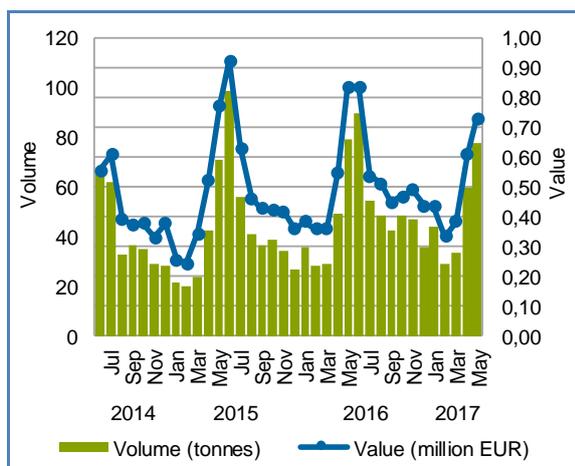
Figure 6. **TURBOT: FIRST SALES IN DENMARK**



Source: EUMOFA (updated 13.07.2017).

In the **UK** in January–May 2017, first sales reached EUR 2,49 million and 245 tonnes. They remained stable in value and increased 11% in volume, compared with January–May 2016. Compared with January–May 2015, they increased 16% in value and 37% in volume. On average, landings peak between May and June.

Figure 7. **TURBOT: FIRST SALES IN THE UK**



Source: EUMOFA (updated 13.07.2017).

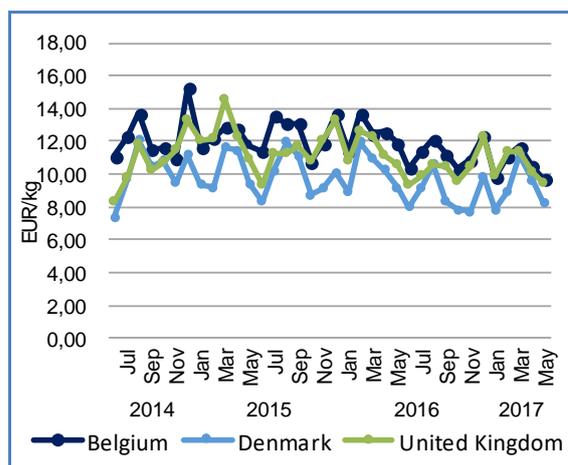
In the past three years, first-sales prices of turbot ranged from 7,40 EUR/kg in Denmark to more than 15 EUR/kg in Belgium. On average, the highest prices were registered in Belgium, and they were approximately 22% and 7% higher than in Denmark and the UK, respectively. Average prices experienced a decreasing trend in the countries surveyed.

In Belgium in January–May 2017, the average unit price was 10,43 EUR/kg, a 15% decrease from both January–May 2016 and January–May 2015. Prices were highest in December, which may be explained by an increased demand in connection with the Christmas season. The highest price was 15,28 EUR/kg (December 2014), corresponding to 25 tonnes.

In Denmark in January–May 2017, the average unit price of turbot was 8,78 EUR/kg (–11% from January–May 2016 and –12% from January–May 2015). Lower prices were typically registered in June, when the supply of turbot increased. The highest price (12,10 EUR/kg) was in August 2014, corresponding to 26 tonnes.

In the UK, the highest price was reached in March 2015, at 14,53 EUR/kg and 24 tonnes. However, in general, prices were higher in December, when the supply of turbot was less abundant. In January–May 2017, the average unit price was 10,18 EUR/kg, displaying decreases from January–May 2016 (–9%) and January–May 2015 (–15%).

Figure 8. **TURBOT: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 13.07.2017).

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

First sales: Belgium (8/2016, 9/2015, 2/2014, April 2013)

2. Global Supply

EU / Common Fisheries Policy: The European Commission set the principles for 2018 fishing opportunities, i.e. fixing total allowable catches (TACs) and national quotas. TACs for the Baltic Sea will be set in October; TACs and quotas for the Black Sea and the rest of the EU stocks will be set in December 2017⁸.

Fisheries / Albacore tuna / Spain: Albacore tuna fisheries are one of the main sources of income for the Spanish Basque coastline fishing fleet, which consists of approximately 80 vessels employing 850 fishermen who fish this species. In 2016, catches were close to 6.000 tonnes, 20% higher than a year before. This confirms the positive trend observed in recent years: more than 5.000 tonnes in 2015, 2.900 tonnes in 2014, and 3.600 tonnes in 2013. However, the species characteristics and changes in its migratory habits makes difficult forecasting catches for the current northern albacore tuna season⁹.

Fisheries / Octopus / Spain: The octopus fishing season started in Galician waters on 3 July, according to a new management plan, which sets a maximum catch of 30 kg/day per fishing vessel, until 30 August. To this amount, 30 kg will be added per day for each crew member enrolled on board, up to a maximum of 210 kg per day¹⁰.

Fisheries / Italy: In 2016, the Italian fleet landed 188.000 tonnes of fish (-0,4% from 2015) with a value of EUR 904 million (+1,6%). The main species caught in terms of value were shrimp (EUR 148 million), hake (EUR 67 million), anchovy (EUR 56 million), cuttlefish (EUR 54 million), and octopus (EUR 48 million). Sicily was the main producing region (27% of total landings in value), ahead of Apulia (15%), Marche (9%), and Veneto (8%). Trawling was the most important fishing system (51% of total landings in value), ahead of small-scale coastal fishing (24%) and purse-seine (8%)¹¹.

Fisheries / Iceland: The total catch for Icelandic vessels in June 2017 was 53.019 tonnes, 27% more than in June 2016. The increase was mostly attributable to blue whiting, which ended at 15.581 tonnes (+100%) and cod, 18.304 tonnes (+3%) over May 2016. On a year-to-year basis (July 2016–June 2017), the total catch ended at 1.118.522 tonnes, 5% more than the same period a year before¹².

Aquaculture / Spain: The Spanish aquaculture production was estimated at 292.689 tonnes (2016), a slight increase (+1%), over 2015. The main finfish species produced were European seabass (23.445 tonnes at EUR 132,9 million), trout (17.732 tonnes at EUR 70,9 million), gilthead seabream (13.740 tonnes at EUR 79,4 million), turbot (7.396 tonnes at EUR 63,4

million), meagre (1.798 tonnes at EUR 10,1 million), sole (755 tonnes at EUR 7,5 million), and eel (315 tonnes at EUR 2,8 million). The mussel production was estimated at approximately 227.000 tonnes¹³.

Aquaculture / Scotland: In 2016, Scottish shellfish aquaculture production was estimated at EUR 14,3 million (GBP 11,7 million) at first-sales value, rising substantially over 2015 (GBP 10,1 million). Production was dominated by mussel and Pacific oyster, although small quantities of scallop, queen scallop, and native oyster were also produced. In all, 7.732 tonnes of mussels were produced for the market in 2016 (+6% over 2015). This is the highest level of mussel production recorded in Scotland. The greatest contribution to regional mussel production was from Shetland, accounting for 5,686 tonnes or 74% of Scotland's total. Pacific oyster production increased 31% from 2015 to reach 3,5 million shells (283 tonnes)¹⁴.

Certification / Cod / UK: A fishery association has achieved Marine Stewardship Council (MSC) certification for the Atlantic cod (*Gadus morhua*). The certification includes Scottish and English fishing vessels, members of the association, catching cod in the North Sea. The fishery supplies mainly the UK food-service sector with fresh and frozen fillets¹⁵.

Certification / Pike-perch / Sweden: A Swedish fishery has achieved MSC certification for pike-perch (*Sander lucioperca*), also known as zander. The certification concerns the lakes of Mälaren and Vänern, where annual catches vary from 60 to 120 tonnes, and 100 to 200 tonnes, respectively. Pike-perch is a highly prized species on the Swedish market. In addition, it is exported to Germany and the Netherlands¹⁶.

Trade / Spain: In January-May 2017, Spanish exports of canned, semi-prepared and prepared seafood products reached 83.172 tonnes and EUR 3,78 billion, an increase of 13% and 21%, respectively, compared with the same period of 2016. Canned tuna was the main product exported: 49.089 tonnes for EUR 2,48 million. Italy, France, Portugal, and the UK are the leading EU buyers of canned tuna¹⁷.

Trade / Russian Federation: The Russian government has extended the ban on imports on perishable foodstuffs (including fisheries and aquaculture products) originating in the EU until the end of 2018. In addition to EU Member States, Albania, Iceland, Liechtenstein, Montenegro, Norway, Ukraine, as well as Australia, Canada, and the USA, are also affected¹⁸.

3. Case studies

3.1. HADDOCK IN THE EU



3.1.1. SUMMARY

The EU fleet participates in the haddock fishery in several areas in the Northeast Atlantic, including the North Sea, where the species is subject to total allowable catches (TACs). In 2015, the EU took 15% of the total global haddock catch. Norway and Russia led the world in haddock catches.

In general, the EU depends on imported haddock to meet market demand, achieving only 30% self-sufficiency through its own catches. Most extra-EU haddock imports arrive as fresh/frozen whole, less-processed products from Norway. Such products are either transferred straight to the domestic market or processed and, in some cases, re-exported to other EU Member States.

Haddock is not one of the top seafood species consumed in the EU (less than 0,33 kg per capita annually), but it is still important in certain markets such as the UK, the EU's largest whitefish market. In the UK, haddock is used mainly for fish and chips, especially in northern England and Scotland. In 2015, it reached a total consumption of approximately 30.000 tonnes product weight.

3.1.2. BIOLOGY

Haddock (*Melanogrammus aeglefinus*) can be found in both the Northeast and Northwest Atlantic. It is found in the east from the Celtic Sea to Spitsbergen, the Barents Sea, and around Iceland. In the west, it is found from Georges Bank to Newfoundland¹⁹.

In the northeast, there are two different species of haddock, Northeast Arctic haddock (Barents Sea) and North Sea haddock. The EU fleet fishes mainly North Sea haddock because of its location and availability. Haddock can also be found in the Skagerrak and Kattegat. It can reach up to 60 cm in length and 4 kg in weight. Spawning lasts from March to May and occurs in the central North Sea. North Sea haddock grows more slowly than cod, causing the species to be, on average, smaller than haddock in the Barents Sea²⁰.

3.1.3. MANAGEMENT

The total allowable catch (TAC) is made up of separate quotas in different subareas where the EU participate: the Irish Sea, Rockall, the North Sea, West of Scotland, the Skagerrak, the southern Celtic seas, the English Channel, and the Northeast Arctic. TACs are set based mainly on the level of the biomass in different subareas, but can also be influenced by the biomass of other species, e.g. cod in the same area. This is to prevent putting too much pressure on the stock, with both fishermen and a large biomass of cod preying on the species.

In the Barents Sea, the Joint Norwegian-Russian Fisheries Commission (<http://www.jointfish.com/eng>) sets TACs on several species, including haddock. It has implemented revised management rules for cod, haddock, and capelin to achieve as optimally a managed stock as possible and to set reasonable TACs each year. In 2017, the joint commission celebrated its 40th anniversary.

From 2012 to 2013, the haddock quota was significantly reduced in the Northeast Atlantic, caused mainly by a strong biomass of northeast Arctic cod, leading to an increased quota on that species. In subsequent years, the cod biomass weakened, and its quota was lowered, reducing the pressure on haddock stocks and allowing an increased quota in following years.

In 2017, the EU quota decreased 34%, from approximately 73.100 tonnes in 2016 to approximately 48.130 tonnes, mainly the result of a weaker biomass. In comparison, the Norwegian quota was reduced 4%, to 114.000 tonnes.

In addition to quotas in EU waters, the EU also has a small haddock quota in the Northwest Atlantic Fisheries Organization (NAFO) convention area (on the east coast of Canada), where catches amounted to 225 tonnes in 2016²¹.

3.1.4. PRODUCTION

Globally Norway is the largest player in the haddock fisheries. In 2015, the total catch was 281.000 tonnes, a 7% increase over 2014, with Norway accounting for 35% of the total. The common gears used in the haddock fishery are bottom trawls, longlines, gillnets and, to a lesser extent, traps²².

Table 3. MAIN NATIONS CATCHING HADDOCK (1000 tonnes)

Country	2010	2011	2012	2013	2014	2015
Norway	125	160	161	101	94	97
Russia	112	140	144	86	79	92
Iceland	65	51	48	45	36	41
UK	34	30	35	40	36	33
Canada	22	15	9	8	16	18
Other	39	34	34	28	27	27
Total	396	396	397	280	262	281

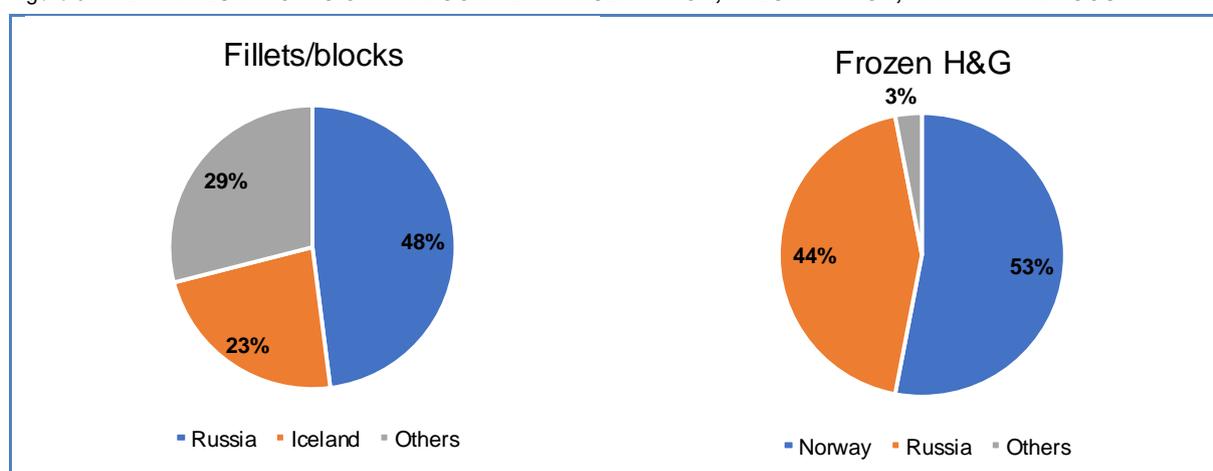
Source: FAO.

Catches of haddock are used as (1) frozen fillets/blocks both single and double frozen, (2) fresh/frozen headed and gutted, and (3) a small number of salted products. Russia and Iceland represented most of the frozen fillets/blocks production (in volume), with approximately 48% and 23% of the total, respectively. For frozen, headed and gutted (H&G) volume of haddock, Norway accounted for approximately 53% and Russia 44%, whereas for fresh, headed and gutted, there were an equal split between Norway, the EU, and Iceland. Overall in 2015, 32% of haddock catches were produced as frozen fillet/block, whereas frozen and fresh headed and gutted accounted for 31% and 36%, respectively²³.

The UK is the EU's largest player in the haddock fishery, with catches of approximately 33.000 tonnes in 2015, approximately 70% of the total EU catch. France was the next largest with approximately 6.260 tonnes, followed by Ireland with approximately 3.130 tonnes. The top three ports for landing haddock in the EU are located in the UK: Peterhead, Scrabster, and Fraserburgh. All haddock landings in these ports are fresh whole. This is the common landing presentation and preservation status in other ports in the EU as well (99%). The small volume that is not landed as fresh whole is landed as frozen fillets or frozen whole.

In 2015, the EU accounted for 15% of the total catches of haddock at approximately 47.000 tonnes.

Figure 9. EXTRA-EU IMPORTS OF HADDOCK – BY PRESENTATION, PRESERVATION, AND PARTNER COUNTRY



Source: Eurostat.

3.1.5. TRADE

In 2016, the EU imported various haddock products for a value of EUR 210 million and 70.000 tonnes. This was a decrease in value (-8%) from 2015, but an increase in volume (+9%). The EU depends strongly on importing haddock to fulfil the domestic demand, achieving just 30% self-sufficiency through its own catches²⁴.

The UK is the EU's largest whitefish market. In 2016, it imported haddock products at a value of EUR 115 million and 33.000 tonnes. Most of the imported volume to the

EU, and the UK, comprises frozen products, headed and gutted or fillets.

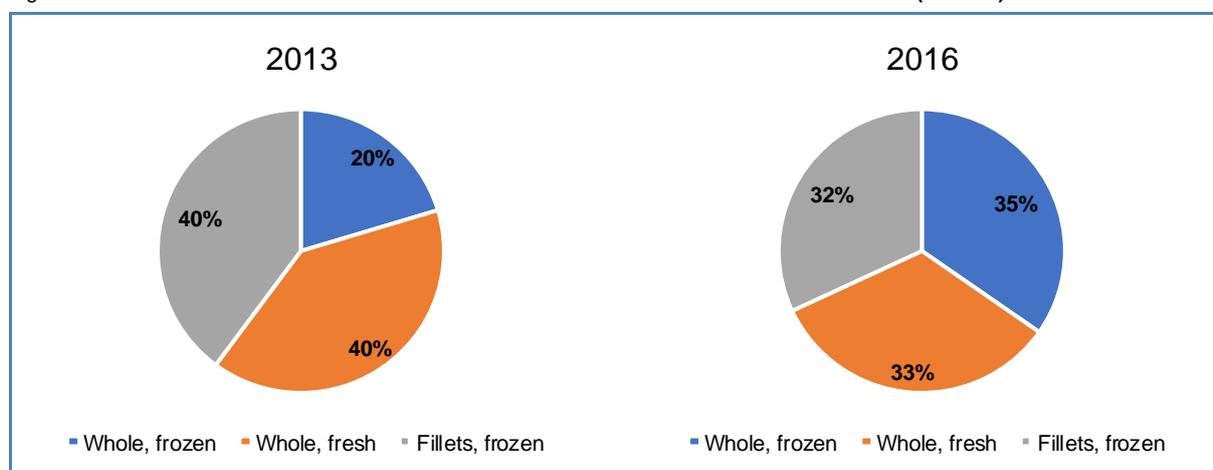
Although the Netherlands is listed as the second largest importer of haddock from extra-EU countries, it is not just a consumer market, but also a large trading hub for haddock, commonly re-exporting a large share of the imported volume to the UK, as well as to France. This is mostly a "clean" re-export, but also processed volume (whole to fillets).

Table 4. EXTRA-EU IMPORT OF HADDOCK – TOP MEMBER STATES (million EUR and 1000 tonnes)

Member State	2014		2015		2016	
	Value	Volume	Value	Volume	Value	Volume
United Kingdom	105	24	131	29	115	33
Netherlands	37	9	44	11	49	14
Denmark	25	13	25	12	22	11
Sweden	15	8	17	8	14	7
Poland	12	4	6	2	8	4
Other	5	1	5	1	3	1
Total	199	60	229	64	210	70

Source: EUMOFA, based on Comext.

Figure 10. EXTRA-EU IMPORT OF HADDOCK BY PRESENTATION AND PRESERVATION (volume)



Source: Eurostat.

The main suppliers of haddock to the EU are Norway, Russia, and Iceland, accounting for 42%, 22%, and 20%, respectively, of the total import value in 2016. Volumes

from Norway are mainly headed and gutted products, both frozen and fresh, whereas most products from Russia and Iceland are frozen fillets.

Table 5. EXTRA-EU IMPORT OF HADDOCK – TOP PARTNER COUNTRY (million EUR and 1000 tonnes)

Partner Country	2014		2015		2016	
	Value	Volume	Value	Volume	Value	Volume
Norway	93	36	94	36	89	40
Russia	35	7	46	10	47	12
Iceland	38	7	52	9	43	9
China	22	5	23	4	17	4
Faroe Islands	10	3	12	3	12	4
Other	2	1	1	1	2	1
Total	200	59	228	63	210	70

Source: EUMOFA, based on Comext.

3.1.6. CONSUMPTION

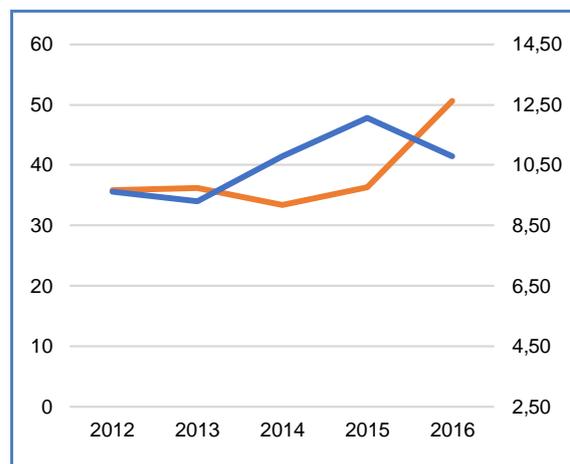
The overall consumption of haddock in the EU is lower than for other species. Although consumption of haddock is 0,33 kg/capita annually, the consumption of other whitefish species is significantly greater, with cod at 2,4 kg/capita and Alaska pollock at 1,58 kg/capita. In the UK however, haddock has an important position. In 2015, UK consumption of fresh haddock reached almost 30.000 tonnes, making it the fourth most consumed species after cod, salmon, and pollack²⁵.

Along with cod, haddock is the top species used in fish and chips. Typically, haddock is preferred in Scotland, Yorkshire, other parts of northern England and the Midlands, whereas cod is preferred in the rest of England. In Scotland, haddock from the North Sea is used, whereas haddock from the Barents Sea and Iceland is common in England, often as FAS (frozen at sea) fillets²⁶.

The retail price of fresh haddock in the UK has been increasing since 2013, which can be explained by a shrinkage in the availability of haddock in the market, mainly on account of reduced quotas. One reason for this was the large increase in Atlantic cod quotas the same year. In 2016 and 2017, the haddock quotas have been increasing again, and available volume and prices are responding.

In general, haddock is marketed as a variety of products: fresh, chilled as fillets, frozen, smoked, and canned²⁷. In 2015, 9% of French households bought fresh haddock once or more times. This makes haddock 15th on the list of the most purchased seafood products in France²⁸.

Figure 11. **DEVELOPMENT OF THE UK QUOTA AND RETAIL PRICE OF FRESH HADDOCK**



Source: EUMOFA.

3.2. FISHERIES AND AQUACULTURE IN INDIA



Source: <http://www.maps-of-india.com>

India is one of the largest players in the global fish and seafood industry. It was the third world's third largest fish producer (marine, inland fisheries and aquaculture) in 2015. It was the third largest aquaculture producer and the fourth largest capture-fishery (including inland) producer. The value of Indian exports of fish, crustaceans, molluscs, and other aquatic invertebrates reached EUR 4,2 billion in 2015 (USD 4,9 billion)²⁹. This was a 13% decrease from 2014. Frozen shrimp contributes substantially to India's export value, but apart from farmed shrimp, most production supplies the domestic market.

3.2.1. PRODUCTION

CATCH

India has a coastline of 7.516 km spread over nine maritime states and four union territories³⁰. The Indian Exclusive Economic Zone (EEZ) reaches more than 2 million km². In addition, India has many rivers and lakes where important inland fishery activity occurs³¹. According to the FAO, total capture fishery production reached more than 4,8 million tonnes in 2015, of which approximately 25% was from inland resources.

India's freshwater resources consist of rivers and canals (197.024 km), reservoirs (3,15 million ha), ponds and tanks (235 million ha), oxbow lakes and derelict waters (1,3 million ha), brackish waters (1,24 million ha) and estuaries (0,29 million ha). The inland capture fish production has increased from 192.000 tonnes in 1950 to

1,25 million tonnes in 2014; the major species are cyprinids, siluroids, and murels³².

Production of marine fish has increased from approximately 50.000 tonnes in 1950 to 3.51 million tonnes in 2015, approaching the catch potential of 4,4 million tonnes of the Indian EEZ, but registering a 5,3% decline from 3,59 million tonnes in 2014. The major species were sardine, prawn, cephalopods, threadfin and dwarf bream, and tuna, bonito, and billfish.

In 2016, marine fish landings reached 3,63 million tonnes, a 6,6% increase over 2015. The corresponding estimated value was EUR 6,42 billion, 21% over 2015. Pelagic species contributed 52% to total landings (top species: Indian mackerel, oil sardine, and ribbonfish). Demersal finfish accounted for 29% of landings (threadfin bream, croaker, and bulleye), crustaceans (12%; prawn), and molluscs (7%; squid and cuttlefish). In 2016, Indian mackerel became the highest contributor with 249.000 tonnes; Indian oil sardine slipped to second position, continuing the decreasing trend observed since 2013. In addition, a significant change was observed in the 2016 landing pattern of bulleye (*Priacanthus spp.*). From a mere 43.576 tonnes in 2015, its landings have increased sharply to 130.000 tonnes³³.

Marine fishery catches are greater in waters off the west coast of India (64% of landing volumes in 2016) owing to the large continental shelf in the Arabian Sea and a more active upwelling phenomenon. In 2016, the northwest region, including Gujarat and Maharashtra, accounted for 33% of landing volume; the southwest region, including Goa, Karnataka, and Kerala, accounted for 31%; the southeast region, including Tamil Nadu, Pondicherry, and Andhra Pradesh, accounted for 26%; and the northeast region, including Orissa and West Bengal, accounted for 10%.

Coastal fisheries fall under state jurisdiction and take place within the first 12 nautical miles from the baseline out to sea. Deep-sea fishery operations, falling under the jurisdiction of the union government, take place mostly between the 12 nautical miles and the outer boundary of the EEZ. Management of inshore fisheries is the responsibility of state governments, usually operating through state fishery departments and with specific state-based legislation³⁴.

According to government figures, approximately 80.000 mechanised fishing boats are currently in use along with approximately 75.000 motorised fishing boats and approximately 50.000 traditional non-motorised fishing craft. A large variety of fishing gear is used. However, trawlnets, gillnets, and ring-seines account for nearly 80% of marine landings.

Table 6. TOP SPECIES GROUPS CAUGHT BY THE INDIAN INLAND AND MARINE CAPTURE FISHERIES (tonnes)

Species group	2010	2011	2012	2013	2014	2015
Carps, barbels and other cyprinids	575.773	373.293	614.927	499.851	511.500	548.500
Shrimps, prawns	303.757	385.747	393.236	390.119	432.807	395.346
Clupeoids nei	89.236	93.330	100.299	93.959	292.875	339.106
Indian oil sardine	320.227	381.713	404.298	376.189	544.684	265.667
Squids, cuttlefishes, octopuses	110.453	88.329	98.048	80.225	173.213	213.477
Threadfin and dwarf breams	-	-	-	-	136.931	162.764
Tunas, bonitos, billfishes	141.276	157.382	185.212	189.374	190.066	156.327
Anchovies	107.536	113.916	114.449	124.276	143.545	146.287
Snakeheads (=Murrels)	87.236	66.164	76.776	127.953	130.000	139.700
Bombay-duck	156.262	136.820	188.313	196.975	113.346	111.167
Other	2.824.060	2.539.438	2.720.071	2.588.261	2.332.011	2.383.697
Total	4.715.816	4.336.132	4.895.629	4.667.182	5.000.978	4.862.038

Source: FAO.

AQUACULTURE

According to the FAO, total aquaculture production in 2015 was 5,24 million tonnes, most of which was consumed on the domestic market, except for shrimp and freshwater prawn, which were mainly exported.

Aquaculture production can be divided into three sectors: freshwater aquaculture, brackish-water aquaculture, and marine aquaculture, which are present in different states.

First, in 2015, Indian **freshwater aquaculture** accounted for 88% of the total aquaculture production in volume (source: FAO). It comprises approximately 2,36 million ha of ponds and tanks, and accounts for nearly 50% of the total fish production in India. Additionally, freshwater aquaculture occurs in lakes, irrigation canals, reservoirs, and paddy fields. It is often combined with the production of shrimp in traditional low-brackish-water ponds.

Freshwater aquaculture in eastern India consists mainly of ponds and tanks of less than 1 ha. In western India, aquaculture is operated on a larger scale, with watersheds of 25 ha. In northern India, more use is made of open waters for aquaculture. In the south, ponds for crop irrigation are used in aquaculture. Different species of Indian carp – catla (*Catla catla*), roho (*Labeo rohita*), and mrigal (*Cirrhinus mrigala*) – contribute between 70% and 75% of the total freshwater fish production. Silver carp, grass carp, common carp, and catfish make up 25–30% of the production. Production is destined mainly for the high-demand domestic market; processing of freshwater aquaculture produce is rare.

Second, in the domain of **brackish water aquaculture**, shrimp species are the main product. Between 2006 and 2015, shrimp farming experienced a significant increase from 144.000 tonnes to more than 500.000 tonnes. The whiteleg shrimp (*Litopenaeus vannamei*) is produced inland and is mainly destined for export. This species is rapidly replacing the black tiger shrimp (*Penaeus monodon*). In addition to the production of shrimp, seabass, milkfish, and other freshwater species are also produced in brackish-water aquaculture.

The shrimp production uses different methods: (1) after the harvest of rice (polyculture), such as in central Kerala, Odisha, Karnataka, Goa, and parts of West Bengal, combined with the growing of rice, which is mainly practiced in Goa and West Bengal, or (2) in dedicated ponds using scientific methods, as in Andhra Pradesh and parts of West Bengal.

Third, **marine aquaculture**, focusing on the production of mussels, oyster, and seaweed, has experienced a recent increase in production (especially for oyster). However, the production, which takes place mainly in the states of Maharashtra, Gujarat, Kerala, Andhra Pradesh, West Bengal, and Tamil Nadu, is still modest and is often based on traditional practices. Additionally, the great potential of finfish sea-farming has not been realised, mainly because of technical and marketing issues. The development of circular cages and the production of seabass and cobia species are receiving much attention. Although marine aquaculture at sea is limited, inland and coastal production of saltwater shrimp is more common³⁵.

According to FAO, in 2015, Indian aquaculture production of marine fish and molluscs reached 90.000 tonnes and 12.600 tonnes, respectively.

Table 7. TOP SPECIES PRODUCED BY INDIAN AQUACULTURE (tonnes)

Species	2010	2011	2012	2013	2014	2015
Catla	2.705.184	2.148.427	2.458.788	2.489.759	2.500.000	2.500.000
Roho labeo	279.004	645.300	627.662	743.284	790.000	846.000
Whiteleg shrimp		125.000	136.300	211.200	305.251	416.347
Silver carp	129.847	103.331	123.240	301.339	320.000	343.000
Mrigal carp	87.686	131.793	165.782	159.028	170.000	182.000
Giant tiger shrimp	-	130.000	131.900	78.500	70.389	82.043
Other	588.300	393.733	570.308	572.099	728.381	868.629
Total	3.790.021	3.677.584	4.213.980	4.555.209	4.884.021	5.238.019

Source: FAO.

3.2.2. TRADE

GLOBAL INDIAN FISH TRADE

In recent years, India has become one of the world's most important seafood exporters. In 2015, the country had a positive trade balance of EUR 4,11 billion (USD 4,79 billion).

Table 8. INDIAN TRADE BALANCE OF SEAFOOD (billion USD)

Trade flow	2013	2014	2015
Exports	4,81	5,61	4,88
Imports	0,06	0,07	0,09
Balance	4,75	5,54	4,79

Source: MPEDA, Fishexchange³⁶.

According to the Marine Products Exports Development Authority (MPEDA), during the 2015–2016 financial year, Indian seafood exports reached EUR 4,7 billion (USD 5,5 billion), of which 66% were frozen shrimp. The remaining export value included frozen fish (11%), frozen cuttlefish (5%), frozen squid (5%), dried items (3%), chilled items (3%), live items (1%), and other items (6%). The main destination countries were the USA (28%), Southeast Asia (25%; mostly Vietnam and, to a lesser extent, Thailand, Taiwan, Malaysia, and Singapore), the EU (21%), Japan (9%), Middle Eastern countries (6%), and China (5%).

Table 9. MAIN IMPORTING COUNTRIES FROM INDIA (2015–2016)

Countries	Volume (tonnes)	Value (million USD)
USA	153.695	1.334
Southeast Asia	328.900	1.153
EU	186.349	971
Japan	75393	403
Middle East	53.905	276
China	50.042	221
Others	97.609	330
Total	945.892	4.688

Source: MPEDA³⁷.

During the period 2015–2016, Indian seafood imports reached EUR 92 million (USD 107 million) and 50.000 tonnes. The main products imported were other frozen fish of Combined Nomenclature (CN) heading 030289 (15% of import value), fish powder, fishmeal fit for human consumption (15%), other fish products (11%), other fish file and fish meat (9%; excluding fresh, chilled, or frozen), and other algae (9%).

The main exporters to India during the period were Bangladesh (20%), Vietnam (16%), the USA (11%), Israel (9%), the EU (6%), Thailand (5%), Morocco (5%), and Mauritania (4%).

Table 10. TOP EXPORTING COUNTRIES TO INDIA

Countries	Volume (tonnes)	Value (million USD)
Bangladesh	9.031	21
Vietnam	12.145	17
USA	645	12
Israel	44	10
EU	663	7
Thailand	3.864	6
Morocco	3.454	5
Mauritania	3.579	4
Others	16.694	26
Total	50.119	107

Source: Fishexchange.

INDIA AND THE EU

In 2016, EU imports of Indian seafood totalled EUR 943 million and 183.000 tonnes. The most important species imported were tropical shrimp (43% of import value), squid (17%), other molluscs and aquatic invertebrates (17%), and miscellaneous shrimps (15%). Seafood imports from India were mostly frozen (93%). The rest was imported prepared or preserved (3%) or fresh (2%).

The main EU destinations for Indian exports were Spain (21%), Italy (15%), the UK (14%), France (12%), the Netherlands (11%), and Belgium (11%).

Table 11. TOP EU MARKETS FOR SEAFOOD IMPORTS FROM INDIA (million EUR and 1000 tonnes)

Country	2014		2015		2016	
	Value	Volume	Value	Volume	Value	Volume
Spain	152	47	178	48	201	51
Italy	113	32	128	32	139	32
France	130	23	117	20	134	19
United Kingdom	131	18	125	16	117	18
The Netherlands	83	14	104	17	107	17
Belgium	146	20	135	19	105	15
Other	120	28	129	27	140	31
Total	875	183	917	180	943	183

Source: EUMOFA.

Table 12. TOP MAIN COMMERCIAL SPECIES IMPORTED FROM INDIA (million EUR and 1000 tonnes)

Main Commercial Species	2014		2015		2016	
	Value	Volume	Value	Volume	Value	Volume
Tropical shrimp	429	54	407	52	407	52
Squid	91	35	114	38	161	47
Other molluscs and aquatic invertebrates	136	42	154	40	157	35
Miscellaneous shrimps	149	27	166	27	145	25
Other	71	25	76	23	72	24
Total	875	183	917	180	943	183

Source: EUMOFA.

In 2016, EU exports of seafood to India totalled EUR 5 million and 1.900 tonnes. The most important commercial species exported by value were salmon (35%), other non-food use (23%), and tropical shrimp (12%).

In 2016, the main EU exporter to India was the UK (31%), followed by Ireland (21%) and Denmark (12%). Salmon was the most important seafood product exported from the UK (mostly fresh) and Denmark (frozen or smoked), whereas Ireland's major export product was other non-food use products.

Table 13. TOP EU MEMBER STATES EXPORTING TO INDIA (1000 EUR and tonnes)

Country	2014		2015		2016	
	Value	Volume	Value	Volume	Value	Volume
United Kingdom	1.641	234	2.084	392	1.589	244
Ireland	258	365	700	1.452	1.063	1.340
Denmark	437	42	351	29	620	51
Poland	684	62	201	20	365	24
Italy	81	28	129	26	358	104
Other	1.455	305	2.178	314	1.126	150
Total	4.557	1.036	5.642	2.233	5.120	1.914

Source: EUMOFA.

Table 14. TOP MAIN COMMERCIAL SPECIES EXPORTED TO INDIA (1000 EUR and tonnes)

Species	2014		2015		2016	
	Value	Volume	Value	Volume	Value	Volume
Salmon	1.974	200	1.364	160	1.778	166
Other non-food use	211	354	790	1.465	1.200	1.349
Tropical shrimp	685	83	1.312	142	626	69
Other molluscs and aquatic invertebrates	-	-	109	27	424	76
Other products	535	129	667	240	319	115
Other	1.151	271	1.400	198	773	139
Total	4.557	1.036	5.642	2.233	5.120	1.914

Source: EUMOFA.

4. Consumption

HOUSEHOLD CONSUMPTION IN THE EU

In April 2017, the consumption of fresh fisheries and aquaculture products decreased in both volume and value in Denmark (-21% and -8%, respectively), Poland (-5% and -1%), and Spain (-15% and -9%) relative to April 2016. In France, value decreased and volume remained the same. In the Netherlands, volume remained the same and value increased. In the rest of the Member States analysed, volume and value increased.

The largest increase in volume and value in April 2017 was observed in Hungary (+56% in volume and +59% in value). The large increase in Hungary has probably to be linked to the fact that Easter, a period of high carp consumption, was in April 2017.

Compared with March 2017, both volume and value increased in Denmark, Germany, Hungary, and Sweden.

Table 15. APRIL OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)

Country	Per capita consumption 2014* (live weight equivalent) Kg/capita/year	April 2015		April 2016		March 2017		April 2017		Change from April 2016 to April 2017	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	22,1	859	13,16	870	12,50	557	8,60	685	11,56	-21%	-8%
Germany	13,3	5.601	81,78	5.946	86,07	5.924	88,88	6.390	96,32	7%	12%
France	34,4	18.123	230,80	18.453	206,73	19.779	224,55	17.261	207,25	6%	0%
Hungary	4,6	416	2,01	267	1,22	222	1,18	416	1,94	56%	59%
Ireland	23,0	1.068	14,12	1.001	13,80	1.409	19,73	1.189	16,59	19%	20%
Italy	28,9	26.083	221,26	26.020	221,83	28.846	261,79	26.962	234,28	4%	6%
Netherlands	22,6	1.777	26,44	1.689	24,76	2.148	30,23	1.693	27,77	0%	12%
Poland	13,0	4.629	26,70	4.449	24,87	5.430	29,42	4.231	24,50	-5%	-1%
Portugal	55,3	4.847	28,02	4.708	28,40	5.229	34,81	4.351	28,88	-8%	2%
Spain	46,2	57.819	400,88	60.077	417,96	61.163	457,98	51.099	381,08	-15%	-9%
Sweden	33,2	1.261	14,35	848	11,59	638	8,99	992	14,76	17%	27%
UK	24,9	24.058	285,40	23.894	258,36	30.519	322,51	24.670	265,42	3%	3%

Source: EUMOFA, based on Europanel (updated 13.07.2017).

* Data on per capita consumption of all fish and seafood products for all EU Member States can be found at: <http://www.eumofa.eu/documents/20178/77960/The+EU+fish+market+-+2016+Edition.pdf>

In April, in general, the consumption of fisheries and aquaculture products followed an increasing trend in both volume and value in Germany, Ireland, and Italy. Denmark, France, Hungary, Poland, and Spain followed a decreasing trend in both volume and value. In the Netherlands, Portugal, and Sweden, consumption volume followed a decreasing trend, while value followed an increasing trend. In the UK, the opposite trend was observed.

In April, in the past three years, the household consumption in volume of fresh fish products was below the annual average for the past three years in most Member States analysed, except for Germany (+19%), Ireland (+22%), and Sweden (+19%). The opposite trend was observed in value. Value was above the

annual average in most of the Member States. However, in Hungary (-7%), Poland (-3%), Spain (-5%), and the UK (-3%), value was below the yearly average; however, in the rest of the Member States, it was above average. In Sweden, value was 38% above the annual average, the highest for the period surveyed. It was followed by Germany (+35%) and Ireland (+25%). In volume, the lowest quantity registered below the average was in Poland (-19%), Hungary (-17%), and the Netherlands (-16%).

The most recent consumption data available on EUMOFA for **May 2017** can be accessed [here](#).

4.1 FRESH WHITING



Habitat: A benthic-pelagic species living at depths of 10–200 m, mainly on muddy and gravel bottoms, but also on sand and rock³⁸.

Catch area: North and Celtic seas; the English Channel³⁹.

Main producing countries in Europe: France, the UK, Ireland, Denmark⁴⁰.

Production method: Caught.

Main consumers in the EU: France, the UK, Ireland.

Presentation: Whole, fillets.

Preservation: Fresh, chilled, dried-salted.

Ways of preparation: Grilled, baked, pan-fried.

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

First sales: France (4/2016), the UK (6/2015), France (March/2013)

GENERAL OVERVIEW OF HOUSEHOLD CONSUMPTION IN FRANCE

Overall, per capita consumption in France is above the EU average. France reached 34,4 kg per capita consumption of fish and seafood products in 2014 and remained stable compared with 2013. It was 35% higher than the average EU per capita consumption (25,5 kg).

However, compared with the highest per capita consumption in the EU, 55,3 kg, which was registered in Portugal, it was 38% lower. See more on EU per capita consumption in Table 15.

CONSUMPTION TREND IN FRANCE

Long-term trend, January 2013–April 2017: increased in price and decreased in volume.

Average price: 12,34 EUR/kg (2013), 17,75 EUR/kg (2014), 12,66 EUR/kg (2015), 12,72 EUR/kg (2016).

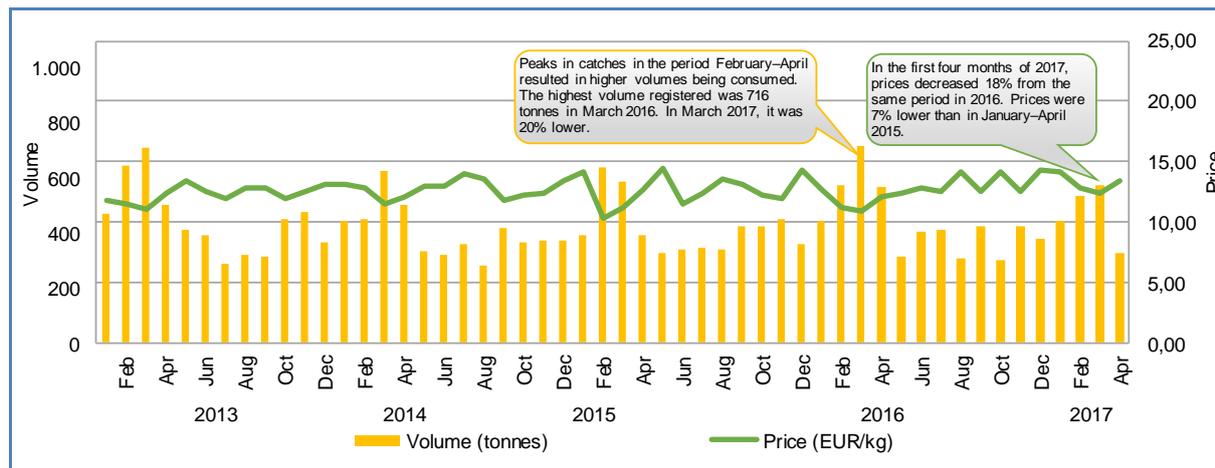
Total consumed volume: 5.352 tonnes (2013), 4.857 tonnes (2014), 5.041 tonnes (2015), 5.270 tonnes (2016).

Short-term trend, January–April 2017: decreased both in value and volume.

Average price: 13,20 EUR/kg.

Total consumed volume: 1.885 tonnes.

Figure 12. RETAIL PRICE AND VOLUME OF FRESH WHITING IN FRANCE

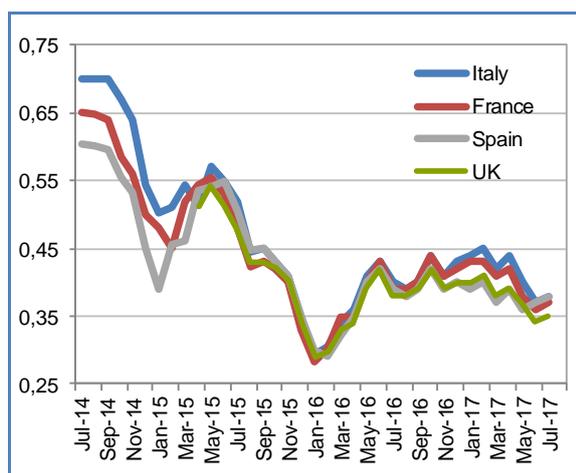


Source: EUMOFA (updated 13.07.2017).

5. Macroeconomic context

5.1. MARINE FUEL

Figure 13. AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/LITRE)



Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; Spain; ARVI (January 2013–May 2015); MABUX (July 2015–July 2017).

In July 2017, the fuel price in the French ports of Lorient and Boulogne was 0,37 EUR/litre, a 3% increase from June 2017. It decreased 5% from July 2016.

In the Italian ports of Ancona and Livorno, the average price of marine fuel in July 2017 was 0,38 EUR/litre. It increased 3% from the previous month and decreased 5% from July 2016.

The price of marine fuel in the ports of A Coruña and Vigo, Spain, in July 2017, increased 3% to 0,37 EUR/litre. It decreased 3% from the same month a year ago.

The fuel price observed in the UK ports of Grimsby and Aberdeen was 0,35 EUR/litre in July 2017, a 3% increase from the previous month and 8% decrease from July 2016.

5.2. FOOD AND FISH PRICES

In June 2017, annual EU inflation was 1,4%, down from 1,6% in May 2017. A year earlier, the rate was 0,1%. In June 2017, the lowest annual rates were recorded in Ireland (-0,6%), Denmark (+0,4%) and Romania (+0,7%), while the highest annual rates were registered in Lithuania (+3,5%), Estonia and Latvia (both +3,1%). Compared with May 2017, annual inflation rose in 6 Member States (Germany, Croatia, Latvia, Lithuania, the Netherlands and Romania), remained stable in 3 (Cyprus, Finland and Sweden), and fell in 18 (data for the UK is not available).

In June 2017, prices of food and non-alcoholic beverages decreased 0,2%, while prices of fish and seafood increased slightly 0,1%, compared with May 2017.

Compared with June 2016, both food and fish prices increased 1,7% and 3,8%, respectively. Compared with June 2015, fish and seafood prices increased 6,9%, while food and non-alcoholic beverages increased 1,9%.

Table 16. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

HICP	Jun 2015	Jun 2016	May 2017	Jun 2017
Food and non-alcoholic beverages	100,15	100,33	102,30	102,06
Fish and seafood	99,31	102,35	106,07	106,19

Source: Eurostat.

5.3. EXCHANGE RATES

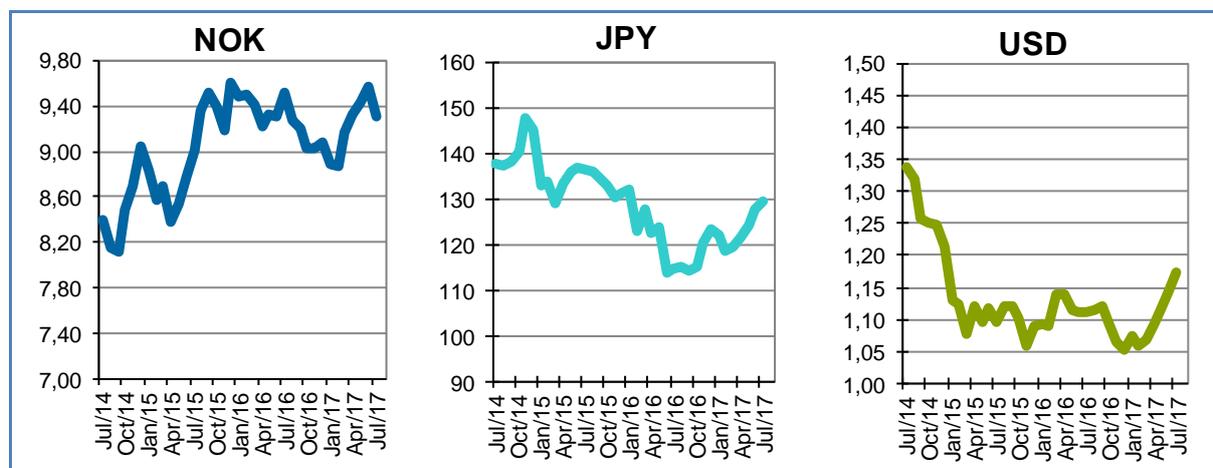
In July 2017, the euro depreciated against the Norwegian krone (-2,8%), and appreciated against the Japanese yen (+1,5%) and the US dollar (+2,8%), compared with June 2017. Since the beginning of the year, the euro has fluctuated around 1,1 against the US dollar. Compared with July 2016, the euro has appreciated 5,5% against the US dollar, 12,9% against the Japanese yen, and depreciated 2,1% against the Norwegian krone.

Table 17. THE EURO EXCHANGE RATES AGAINST THREE SELECTED CURRENCIES

Currency	Jul 2015	Jul 2016	Jun 2017	Jul 2017
NOK	9,0015	9,5092	9,5713	9,3050
JPY	136,34	114,83	127,75	129,70
USD	1,0967	1,1113	1,1412	1,1727

Source: European Central Bank.

Figure 14. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

5.4. EUROPEAN UNION ECONOMIC OVERVIEW

In April–June 2017, seasonally adjusted GDP rate increased 0,6% compared with January–March 2017. In the first quarter of 2017, GDP had grown by 0,5%. Compared with April–June 2016, seasonally adjusted GDP rose 2,2% in the second quarter of 2017, after +2,1% in the previous quarter⁴¹.

Among the EU Member States, in April–June 2017, Sweden recorded a GDP increase of 1,7% compared

with the previous quarter. Compared with the same period a year ago, the GDP rose 3,9%. A similar increase was observed in Lithuania. The GDP rose 3,9% compared with April–June 2016, and 0,6% compared with January–March 2017.

In Austria, France and the UK, seasonally adjusted GDP increased 0,9%, 0,5% and 0,3%, respectively, in the second quarter of 2017 compared with the previous one. Compared with April–June 2016, an increase of 2,9%, 1,8% and 1,7%, respectively, was observed⁴².

EUMOFA Monthly Highlights is published by the Directorate-General for Maritime Affairs and Fisheries of the European Commission.

Editor: European Commission, Directorate-General for Maritime Affairs and Fisheries, Director-General.

Disclaimer: Although the Maritime Affairs and Fisheries Directorate General is responsible for the overall production of this publication, the views and conclusions presented in this report reflect the opinion of the author(s) and do not necessarily reflect the opinion of the Commission or its officers.

© European Union, 2017
KL-AK-17-007-EN-N
ISSN 2314-9671

Photographs ©Eurofish; <http://www.fish-species.org.uk/>; <https://www.fishforthought.co.uk/>; <http://www.maps-of-india.com> .

Reproduction is authorised, provided the source is acknowledged.

FOR MORE INFORMATION AND COMMENTS:

Directorate-General for Maritime Affairs and Fisheries
B-1049 Brussels
Tel: +32 229-50101
Email: contact-us@eumofa.eu

THIS REPORT HAS BEEN COMPILED USING EUMOFA DATA AND THE FOLLOWING SOURCES:

First sales: EUMOFA; Puertos del estado. Data analysed refers to May 2017.

Research Institute, India; The Marine Products Export Development Authority, India; Netherlands Enterprise Agency.

Global supply: European Commission; ITAFISHSTAT; Statistics Iceland; APROMAR; The Scottish Government; ANFACO; The Russian Government; Marine Stewardship Council; <http://www.europapress.es/>.

Consumption: EUMOFA; EUROPANEL; FAO.

Macroeconomic context: Eurostat; ECB; Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; ARVI, Spain; MABUX.

Case studies: EUMOFA; FAO; ICES; IMR; NAFO; Groundfish Forum; Seafish; FranceAgriMer; National Fisheries Development Board, India; <https://indianfisheries.icsf.net>; Central Marine Fisheries

The underlying first-sales data is available in a separate Annex on the EUMOFA website. Analyses are made at aggregated (main commercial species) level.

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.

EUMOFA website is publicly available at the following address: www.eumofa.eu.

6. Endnotes

¹ Bivalves and other molluscs and aquatic invertebrates, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, miscellaneous aquatic products, other marine fish, salmonids, small pelagics, tuna and tuna-like species.

² Data refer to 28 government-owned ports. http://www.puertos.es/en-us/estadisticas/Pages/estadistica_mensual.aspx

³ <http://www.fao.org/fishery/species/2250/en>; www.fishbase.org;
http://www.seafish.org/media/Publications/SeafishSpeciesGuide_Johndory_201401.pdf

⁴ <https://aquatrace.eu/leaflets/turbot/biology>; www.fishbase.org ;

⁵ <http://www.fishbase.org/Summary/SpeciesSummary.php?ID=1348&AT=turbot>

⁶ http://www.seafish.org/media/Publications/SeafishSpeciesGuide_Turbot_201401.pdf

⁷ <http://www.fao.org/gfcm/decisions/en/>

⁸ https://ec.europa.eu/fisheries/common-fisheries-policy-commission-sets-outs-principles-2018-fishing-opportunities_en

⁹ <http://m.noticiasdegipuzkoa.com/2017/07/03/economia/optimismo-en-los-puertos-vascos-ante-la-nueva-costera-del-bonito> (in Spanish).

¹⁰ <http://www.europapress.es/galicia/pesca-00247/noticia-veda-pulpo-galicia-comienza-viernes-prolongara-julio-20170518124420.html> (in Spanish).

¹¹ <http://www.italfishstat.it/component/jdownloads/category/16-dati-economici-e-trasversali.html?Itemid=-1>

¹² <http://www.stalice.is/publications/news-archive/fisheries/fish-catches-in-june-2017/>

¹³ http://apromar.es/sites/default/files/2017/informe/APROMAR_Informe_ACUICULTURA_2017.pdf

¹⁴ <http://www.gov.scot/Resource/0051/00518472.pdf>

¹⁵ <https://www.msc.org/newsroom/news/north-sea-cod-certified-as-sustainable?fromsearch=1&isnewssearch=1>

¹⁶ <https://www.msc.org/newsroom/news/more-swedish-pikeperch-is-msc-certified?fromsearch=1&isnewssearch=1>

¹⁷ <http://www.anfaco.es/es/categorias.php?var1=Noticias&var2=Noticias&var3=&nar1=0&nar2=718&nar3=1745>

¹⁸ <http://government.ru/docs/28304/> (in Russian).

¹⁹ <https://www.ices.dk/explore-us/projects/EU-RFP/EU%20Repository/ICES%20FishMap/ICES%20FishMap%20species%20factsheet-haddock.pdf>

²⁰ http://www.imr.no/temasider/fisk/hyse/hyse_nordsjoen_skagerrak_kattegat/nb-no

²¹ Northwest Atlantic Fisheries Organization.

²² <http://www.fao.org/fishery/species/2228/en>

²³ Groundfish Forum 2016.

²⁴ The EU fish market – 2016 edition (based on Eurostat/National statistics).

²⁵ The EU fish market – 2016 edition.

²⁶ <http://www.seafish.org/research-economics/market-insight/market-summary>

²⁷ <http://www.fao.org/fishery/species/2228/en>

²⁸ http://www.franceagrimer.fr/content/download/44427/424200/file/STA-MER-chiffres%20cl%C3%A9s%20anglais-avril%202016_VMaJ.pdf

²⁹ MPEDA.

³⁰ <http://iomennis.nic.in/index2.aspx?slid=758&sublinkid=119&langid=1&mid=1>

³¹ <http://nfdb.gov.in/about-indian-fisheries.htm>

³² <https://indianfisheries.icsf.net/>

³³ http://eprints.cmfri.org.in/11831/3/Marine%20Fish%20Landings_2016.pdf

³⁴ <http://mpeda.gov.in/MPEDA/cms.php?id=ZmlzaGVyeS1pbmZyYXN0cnVjdHVyZQ==#>

³⁵ <https://www.rvo.nl/sites/default/files/2017/04/aquaculture-in-india-report-2017.pdf>

³⁶ <http://fishexchange.mpeda.gov.in/CountryProfile/Index>

³⁷

<http://mpeda.gov.in/MPEDA/admin/app/webroot/files/annualreport/1495802671MPEDAAR201516FinalPrintPress16112016compressed.pdf>

³⁸ <http://www.fao.org/fishery/species/3022/en>

³⁹ <http://www.eumofa.eu/documents/20178/22933/Monthly+Highlights+-+N.4-2016.pdf>

⁴⁰ FAO.

⁴¹ <http://ec.europa.eu/eurostat/documents/2995521/8122505/2-01082017-AP-EN.pdf>

⁴² Eurostat.