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MONTHLY HIGHLIGHTS

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In January–July 2017, first-sales value increased in Latvia and Portugal over January–July 2016. First-sales value of hake increased in Denmark and experienced an opposite trend in France (–2%), and the UK (–49%). Herring first-sales volume increased in Latvia (+5%) and decreased substantially in the UK (–77%), Sweden (–33%) and, to a lesser extent, in Estonia (–5%). In July 2017, first-sales prices of Norway lobster increased in France, decreased in Denmark and Sweden, and remained stable in Norway.

In January–July 2017, anchovy average unit prices decreased in all countries surveyed: France (–65%), and Italy (–17%) from January–July 2016. By contrast, in France and Italy, sardine prices experienced an opposite trend (+8% and +1%, respectively).

In Portugal, producer organisations (POs) operated 43% of all licensed vessels and accounted for 64% of all fish landed in 2016. The purse-seine fishery is the most represented segment, while multispecies vessels are far less grouped in POs.

Although consumption of animal protein from meat is growing in the EU, consumption of fish protein, especially from aquaculture, is growing globally, especially in less-developed countries. Acceptance of protein from plants on land and in the sea (e.g. algae) is also increasing.

In January–June 2017, the retail prices of fresh octopus for household consumption in Italy and Portugal were 10,05 EUR/kg and 7,69 EUR/kg, respectively. In Portugal, prices increased 15% over January–June 2016.

1. First sales in Europe

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

In **Belgium** in **January–July 2017**, first sales decreased 8% in both value and volume, from January–July 2016. The main factors in the decrease were the drop in first-sales value and volume for cuttlefish (–22% in value, –45% in volume), plaice (–6% in value, –9% in volume), and sole (–19% in value, –16% in volume). Cod, Norway lobster, and scallop also contributed to the decrease, albeit at a smaller scale. In **July 2017**, first-sales value increased for plaice (+20%), ray (+58%), and turbot (+51%) over July 2016. They decreased mainly for sole (–12%). Sole also experienced the largest decrease in volume (–21%). Of the most valuable species, the average price increased for monk (+3%), plaice (+20%), ray (+15%), and sole (+11%), and decreased for turbot (–13%).

In **Denmark** in **January–July 2017**, first sales decreased in both value and volume from January–July 2016. First sales of herring (–13%), Norway lobster (–19%), plaice (–12%), saithe (–10%), and shrimp *Crangon* (–20%) were the main contributors to the decrease in value. Among the major species, first-sales value of cod (+1%), sole and hake (+16%), and monk (+19%) experienced the opposite trend. Mussel (–20%), cod (–18%), plaice (–14%), as well as hake (–8%), and shrimp *Crangon* (–41%) caused the decrease in volume. In **July 2017**, first sales decreased in both value and volume (–4% and –21%, respectively) from July 2016. Herring was the main contributor to the decrease in both value (–60%) and volume (–47%). Among the main species, average prices increased for cod (+5%), hake and plaice (both +20%); they decreased for herring (–24%), Norway lobster (–11%), and saithe (–8%).

In **January–July 2017**, **Estonia** experienced decreases in first-sales value and volume (both –12%) from the same period a year before. Herring (–4% in value, –5% in volume) and sprat (–26% in value, –24% in volume) were mostly responsible for the decreases. In addition, European perch and pike-perch also contributed to the decrease. In **July 2017**, the trend was maintained; the slight decrease in value was because there were no first sales of cod. Higher first sales of European pike-perch (+15%) did not offset the overall decrease. Volume decreased 34% from July 2016. This was also caused by the absence of cod, as well as by the decrease in European pike-perch (–3%) and herring (–94%). The average price of the European perch increased 19%.

In **France** in **January–July 2017**, first-sales value was stable and volume decreased slightly (–1%) from January–July 2016. Squid had the greatest increase in value (+60%), followed by saithe (+25%), sardine (+21%), and John Dory (+9%). Among major species, first-sales value also increased for monk (+2%) and scallop (+14%) and had an opposite trend for sole (–8%), hake (–2%), and Norway lobster (–7%). Anchovy (–34%), cuttlefish (–24%), and whiting (–16%)

experienced the highest decreases in volume. In **July 2017**, both first-sales value and volume decreased from July 2016. The decrease in value was mostly linked to anchovy (–62%), European seabass (–9%), hake (–18%), and Norway lobster (–16%), whereas the decrease in volume was attributable to clam (–29%), hake (–34%), and Norway lobster and whiting (both –26%). Among the top species landed, prices increased substantially for hake (+25%), European seabass (+3%), and Norway lobster (+8%). Prices decreased for cuttlefish (–7%), monk (–2%), and sole (–3%).

In **Italy** in **January–July 2017**, first sales decreased 4% in both value and volume from the same period in 2016. Anchovy (–11%), clam (–27%), deep-water rose shrimp (–5%), and squillid (–12%) were the main contributors to the decrease. Clam (–33%) and squillid (–14%) were also responsible for the decrease in volume, as was mussel (–47%). In **July 2017**, first-sales value increased, and volume decreased compared with July 2016. Swordfish (+32%), red mullet (+26%), and octopus (+18%) were the species with the largest increases in value. Among the major species, mussel (–79%) and swordfish (–12%) experienced decreases in volume. Prices increased substantially for swordfish (+50%), and, to a lesser extent, for clam (+2%) and hake (+3%). Prices decreased for anchovy (–11%) and deep-water rose shrimp (–6%).

Latvia experienced increases in both first-sales value (+9%) and volume (+15%) in **January–July 2017** over January–July 2016. Sprat (+11%) was mostly responsible for the increase in value, as was cod (+5%). Volume increased mainly because of sprat (+22%) and herring (+5%). In **July 2017**, both first-sales value and volume experienced remarkable increases over July 2016. This was attributable to both herring (+103% in value, +117% in volume) and sprat (+243% in value, +300% in volume). Prices decreased for all main species: –37% for cod, –7% for herring, and –14% for sprat.

In **Norway** in **January–July 2017**, first-sales value decreased because of blue whiting (–42%), crab (–47%), and saithe (–18%). Among the main species landed and sold, volume increased for blue whiting (+16%), herring (+21%), and saithe (+12%). In **July 2017**, the significant decrease in first-sales value (–21%) was attributable to Greenland halibut and mackerel (both –56%), crab (–40%), and pouting (–72%). In addition to cod (+18%) and haddock (+28%), volume also increased because of herring (+35%) and saithe (+34%). Except for crab (+16%), prices decreased remarkably for herring (–28%) and saithe (–40%) as well as for cod (–13%) and Greenland halibut (–17%).

In **Portugal** in **January–July 2017**, the increase in first-sales value (+5% over January–July 2016) was mainly the result of anchovy, which reached EUR 5,2 million. Octopus (+6%), sole (+15%), and tropical shrimp (+55%) also contributed to the increase. Volume decreased mainly because of mackerel (–27%) and, to a lesser extent, horse mackerel (–7%) and octopus (–23%). In **July 2017**, the decrease from July 2016 in first-sales value was attributable mainly to anchovy (–36%), octopus (–25%), and sardine (–10%).

Volume increased slightly mainly because of sardine (+33%), as well as mackerel (+2%) and sole (+60%). Prices increased remarkably for octopus (+67%) and horse mackerel (+17%). They decreased for anchovy (-14%), mackerel (-3%), and sardine (-32%).

In **January–July 2017** in **Spain** (a sample of the 28 most important ports), landings of fresh fish (134.659 tonnes) increased 3% from January–July 2016². In **July 2017**, Spain landed 22.955 tonnes of fresh fish, more than in July 2016 (+13%) and July 2015 (+9%). Of these, 7.019 tonnes were landed in the port of Vigo, an increase over July 2016 (+14%) and July 2015 (+2%).

In **Sweden**, the substantial decrease in both value and volume in **January–July 2017** from January–July 2016 was caused mostly by herring (-26% in value, -39% in volume), sprat (-43% in value, -36% in volume), and northern prawn (-18% in value, -31% in volume). In addition, value decreased because of Norway lobster (-21%), and volume decreased because of cod (-20%). The trend was reversed in **July 2017**, compared with July 2016. First-sales value and volume increased mostly because of cod (+23% in value, +47% in volume) and herring (+93% in value, +100% in volume). First-sales prices decreased for cod (-17%),

herring (-3%), mackerel (-6%), and Norway lobster (-13%). They increased remarkably for northern prawn (+36%).

In the **UK** in **January–July 2017**, several species contributed to lower first-sales value and volume: crab, hake, herring, monk, Norway lobster, saithe, and scallop. Norway lobster (-32%) and hake (-49%) experienced the largest decrease in value; herring (-77%) and mackerel (-12%) saw the largest decrease in volume. In **July 2017**, the same decreasing trend was confirmed, compared with July 2016: herring (-83%), Norway lobster (-45%), hake (-84%), scallop (-53%), and crab (-60%). The decrease in volume was also caused mostly by herring (-74%), as well as Norway lobster, crab, and scallop. Among the main species, average prices increased mostly for haddock (+32%), as well as for cod (+13%) and scallop (+6%). They decreased for herring (-35%), lobster *Homarus* spp. (-14%), and crab and monk (both -3%). They remained stable for Norway lobster.

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

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

Country	January–July 2015		January–July 2016		January–July 2017		Change from January–July 2016	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	9.914	37,97	9.839	38,27	9.062	35,36	-8%	-8%
Denmark	130.657	159,01	121.145	185,71	115.930	174,89	-4%	-6%
Estonia	36.383	8,13	33.193	7,78	29.166	6,85	-12%	-12%
France	112.097	375,11	112.618	373,04	111.095	372,78	-1%	0%
Italy*	53.833	190,93	50.055	190,48	48.242	183,35	-4%	-4%
Latvia	30.106	7,44	29.388	6,40	33.926	6,95	15%	9%
Norway	1.796.611	1.255,97	1.602.122	1.308,59	1.747.646	1.288,90	9%	-2%
Portugal	59.417	109,17	52.887	104,62	50.115	110,13	-6%	5%
Sweden	114.408	56,25	68.140	46,90	42.941	35,79	-37%	-24%
United Kingdom	219.218	402,04	234.122	434,22	179.358	338,10	-23%	-22%

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

Country	July 2015		July 2016		July 2017		Change from July 2016	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.048	4,92	1.070	4,86	1.026	4,84	-4%	0%
Denmark	12.338	23,02	12.953	23,59	10.265	22,76	-21%	-4%
Estonia	296	0,13	104	0,14	69	0,14	-34%	-1%
France	15.556	55,49	15.083	51,81	14.728	51,10	-2%	-1%
Italy*	10.063	36,00	8.957	31,51	8.596	32,79	-4%	4%
Latvia	1.360	0,33	493	0,10	1.362	0,23	176%	123%
Norway	102.197	93,87	90.433	98,64	92.685	78,19	2%	-21%
Portugal	13.930	21,92	10.765	20,31	10.911	19,02	1%	-5%
Sweden	2.479	5,90	1.042	4,33	1.318	4,40	27%	2%
United Kingdom	34.343	64,19	37.244	67,42	15.080	33,03	-60%	-51%

Source: EUMOFA (updated 13.09.2017); 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 ANCHOVY AND SARDINE IN SELECTED COUNTRIES

1.1.1. ANCHOVY



Anchovy is a small, short-lived pelagic species, which is found in coastal marine waters in large schools. It tends to move in northern waters on surface layers in summer, retreating and descending in winter. It feeds on planktonic organisms. Spawning occurs from April to November with peaks usually in the warmest months; the limits of the spawning season depend on temperature. Anchovy can reach a length of 20 cm; however, it is usually approximately 12–15 cm (those in tropical waters are smaller than those in northern waters).

The European anchovy (*Engraulis encrasicolus*) is commonly found in the Northeast Atlantic, from the south of Norway, through the English Channel, in the area around the UK and Ireland, to the Bay of Biscay. It is also found in the Mediterranean and Black seas³.

The combination of a short lifespan and variable recruitment leads to violent fluctuations in stock size from year to year. Most European anchovy is caught by pelagic trawlers, and the main fleets concerned are in northwest Spain and southwest France. The fishing season runs from 1 July to 30 June the following year⁴.

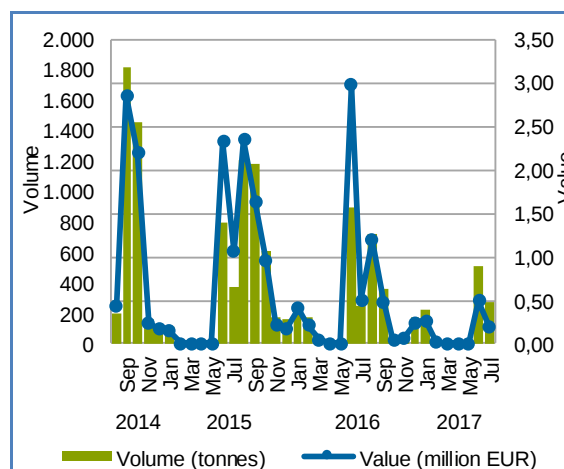
Anchovy is also caught with purse-seiners, lampara (light fishing), and midwater trawls (in winter). Anchovy is subject to fishery-management measures, including total allowable catches (TACs), stock assessments, and fishery closures. In 2017, in the Northeast Atlantic, TACs are set at 45.500 tonnes, and they are shared by France (3.300 tonnes), Spain (35.678 tonnes), and Portugal (6.522 tonnes). The anchovy's minimum landing size is 12 cm (Atlantic Ocean) and 9 cm (Mediterranean Sea)⁵.

Anchovy is commonly marketed as canned and salted, but also fresh or frozen.

In **France** in January–July 2017, first sales of anchovy decreased in both value and volume (–77% and –34%, respectively) from January–July 2016, and totalled EUR 0,97 million and 1.020 tonnes. Compared with January–July 2015, the same trend was maintained: both value (–73%) and volume (–21%) decreased.

La Turballe and Saint-Guénolé are the main ports where anchovy is landed.

Figure 1. ANCHOVY: FIRST SALES IN FRANCE

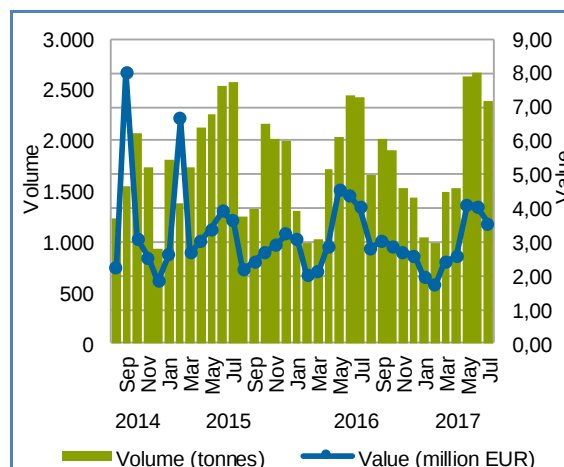


Source: EUMOFA (updated 13.09.2017).

In **Italy** in January–July 2017, first sales of anchovy were EUR 20,33 million and 12.786 tonnes. They decreased 11% in value and increased 7% in volume compared with January–July 2016. Compared with January–July 2015, they decreased in both value (–22%) and volume (–11%).

Ancona, Chioggia, Pescara, and Porto Tolle are the main ports on the Adriatic Sea where anchovy is landed.

Figure 2. ANCHOVY: FIRST SALES IN ITALY



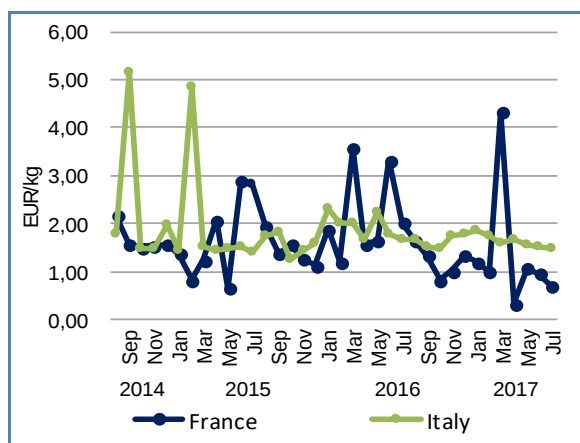
Source: EUMOFA (updated 13.09.2017).

In the past three years, the annual average first-sales price of anchovy in France was 1,63 EUR/kg and approximately 15% higher in Italy (1,86 EUR/kg). Average prices had a decreasing trend in all countries surveyed.

In France in January–July 2017, the average unit price of anchovy was 0,95 EUR/kg, exhibiting a steep decrease from January–July 2016 (–65%). It was 66% lower from January–July 2015. Except for 2017, prices were higher in summer (June–August). The highest prices registered were in March 2017 (4,34 EUR/kg) and March 2016 (3,57 EUR/kg), corresponding to 1 and 14 tonnes, respectively.

Average prices in Italy are the highest of the countries surveyed. They do not seem to follow a seasonal pattern. The highest average price (5,17 EUR/kg) was registered in September 2014, when 1.555 tonnes were landed. In January–July 2017, the average price was 1,59 EUR/kg, lower than January–July 2016 (–17%) and January–July 2015 (–12%).

Figure 3. **ANCHOVY: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 13.09.2017).

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

First sales: Greece (7/2016, 2/2015, January 2013)

Case study: Anchovy in the EU (3/2017)

Consumption: Greece, Italy, and Spain (5/2016, 8/2015, 6/2014)

1.1.2. SARDINE



Sardine, of which European pilchard (*Sardina pilchardus*) is the most common species distributed in

European waters, is a migratory pelagic species that is typically found at depths of 25–55 m during the day and closer to the surface at night (10–35 m). It is fast-growing and starts to reproduce in the first or second year of life. It has a high fecundity, can reach 23–27 cm (common length is 10–20 cm), and lives 10–12 years on average. The species feeds mainly on plankton and crustaceans.

Sardine is distributed in the Northeast Atlantic from Norway and Scotland to Senegal. It is also found in the Mediterranean Sea (mostly in the western part), as well as in the Black Sea.

The species breeds at 20–25 m near shore, or as far as 100 km out to sea during different months, e.g. from April–June (English Channel), August (North and Black seas), September–May (off the European coasts of the

Mediterranean Sea) and November–June (off the African coasts of the Mediterranean Sea)⁶.

The abundance of sardine is linked to variations in recruitment. This depends mainly on environmental conditions, although fishing may also amplify variations in recruitment.

Sardine is caught mostly by purse-seiners and pelagic trawlers, as well as by small-scale fishery fleets. The last are negligible in terms of landings (value and weight), but are important for coastal communities. Examples of artisanal fisheries include lampara nets and xeito (artisanal driftnets).

In EU Atlantic waters, two stocks are relevant to fishery management: the Northern stock (ICES Subareas VII and VIIIa, b, d), fished mainly by France and Spain, and the Southern stock (ICES Subarea VIIIc and Division IXa) fished by Spain and Portugal. The species is important for fisheries and the processing industry (canning) in these countries⁷.

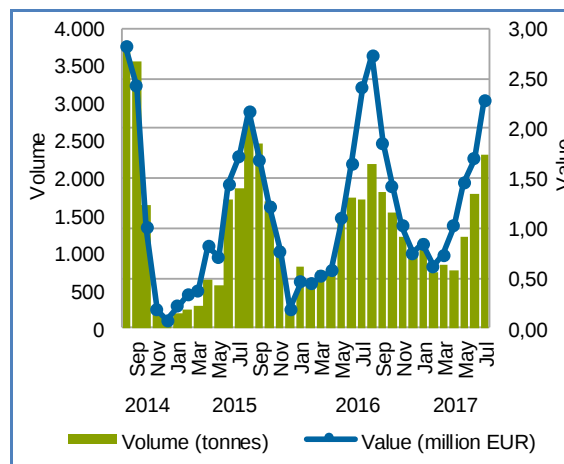
Sardine stocks are not subject to TACs and quotas. Management measures for the Northern stock include technical measures and limits on purse-seine licensing in French waters. Management measures for the Southern stock include technical measures and limits on fishing effort and catches. In the EU, the minimum landing size is 11 cm. Sardine is caught year-round, with peaks in summer⁸.

On the market, sardine is found mostly fresh and canned, as well as frozen. It is also sold dried, salted, and smoked.

In **France** in January–July 2017, first sales of sardine were EUR 8,65 million and 8.876 tonnes. They were greater in both value (+21%) and volume (+13%) than in January–July 2016. Compared with January–July 2015, the trend was maintained: first-sales value and volume increased 54% and 61%, respectively.

Most of the sardine is caught in July–September and landed in Brittany (ports of Douarnenez and Saint-Guénolé).

Figure 4. **SARDINE: FIRST SALES IN FRANCE**

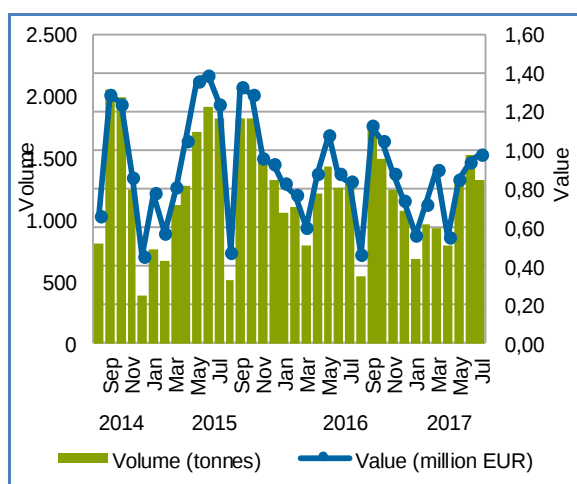


Source: EUMOFA (updated 13.09.2017).

In **Italy** in January–July 2017, first sales reached EUR 5,49 million and 7.555 tonnes. They decreased in both value (–6%) and volume (–7%) from January–July 2016. Compared with January–July 2015, they decreased in both value (–23%) and volume (–19%). On average, landings peak between May–July and September–October.

Ancona, Cesenatico, Chioggia, Porto Garibaldi, and Porto Tolle are the main ports along the Adriatic Sea where sardine is landed.

Figure 5. **SARDINE: FIRST SALES IN ITALY**



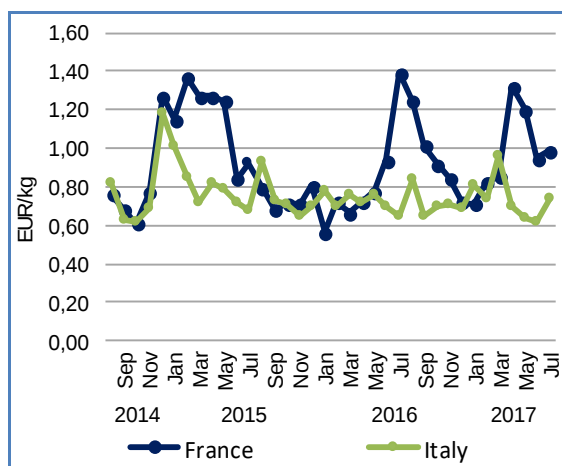
Source: EUMOFA (updated 13.09.2017)

In the past three years, first-sales prices of sardine ranged from 0,56 to 1,39 EUR/kg in France, and from 0,62 to 1,18 EUR/kg in Italy. On average, the highest prices were registered in France. In Italy prices experienced a decreasing trend, while in France they increased slightly.

In France in January–July 2017, the average unit price was 0,97 EUR/kg, an 8% increase over January–July 2016 and a 4% decrease from January–July 2015. Prices do not follow a seasonal pattern. The highest price was 1,39 EUR/kg (July 2016), corresponding to 1.729 tonnes.

In Italy, on average, sardine prices are around 0,75 EUR/kg and do not fluctuate substantially. The highest price was reached in December 2014 at 1,18 EUR/kg, corresponding to 383 tonnes, the lowest volume landed and sold. In January–July 2017, the average unit price was 0,73 EUR/kg, displaying a slight increase over January–July 2016 (+1%) and a 6% decrease from January–July 2015.

Figure 6. **SARDINE: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 13.09.2017).

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

First sales: Greece (3/2016, July 2013); Portugal (5/2015, February 2013)

Case study: Sardine market in the EU (6/2016)

Consumption: Greece (3/2015); Portugal (1/2016, 3/2015); Spain and the UK (1/2016, 3/2015)

1.1.3. ANCHOVY AND SARDINE IN THE ADRIATIC SEA

The Adriatic Sea fisheries account for around one third of the total value of landings in the Mediterranean Sea⁹.

Small pelagic catches are an important component of the Adriatic Sea fisheries. The most valuable and sought-after small pelagic species in the Adriatic Sea are anchovy and sardine.

Anchovy and sardine account for almost all catches of small pelagic fisheries, with anchovy being the more valuable of the two species and the one that drives the fisheries. The vast majority are caught by Italy and Croatia, in the northern part of the Adriatic. The only other Member State involved in the fishery is Slovenia, which accounts for less than 1% of total catches. Albania and Montenegro have an equally small fraction of catches¹⁰.

Currently, small pelagic fisheries in the Adriatic Sea are governed by several legal frameworks at the national, EU, and regional levels. Croatia, Italy, and Slovenia have all adopted national management plans under Council Regulation (EC) No 1967/2006 of 21 December

2006. The existing management framework is based primarily on limiting fishing effort and capacity, coupled with several additional measures, such as spatio-temporal closures and minimum landing sizes.

In 2013, the General Fisheries Commission for the Mediterranean (GFCM) adopted a plan for small pelagic fisheries in the Adriatic, covering international waters, based primarily on regulation of fishing effort (number of vessels, number of fishing days, etc.).

Further emergency measures were adopted by GFCM for 2015 and 2016¹¹.

Albania and Montenegro are also subject to these management measures.

2. Global Supply

Fisheries / Iceland: The total catch for Icelandic vessels in August 2017 was 120.627 tonnes, 1% more than in August 2016. The most notable catch increases were of cod (+25%, 21.348 tonnes) and herring (+32%, 13.372 tonnes). A large decrease in mackerel (-13%) did not offset the overall increase. On a year-to-year basis (September 2016–August 2017), the total catch ended at 1.12 million tonnes, 7% more than the same period a year before¹².

Fisheries / Morocco: In January–July 2017, Morocco's coastal small-scale fleet landed 742.000 tonnes (+10% in value and -1% in volume compared with January–July 2016), pelagics contributing 657.000 tonnes (stable in value, -1% in volume). Thanks to a strong increase in the unit price (+19%), cephalopods became the largest product group in value (39% of the total value), ahead of pelagics (37%) and whitefish (20%)¹³.

Supply / Germany: In 2016, the German supply of fisheries and aquaculture products decreased to 2.173.000 tonnes (live-fish equivalent), 3% down from 2015 and 5% down from 2014. However, the consumption experienced a significant increase over the previous year at 1.164.000 tonnes, i.e. 14,2 kg per capita (13,5 kg in 2015). Imports make up 87% of the German market (primarily Poland, Norway, the Netherlands, Denmark, and China). The German fleet lands more in foreign ports (-9%, 160.000 tonnes in 2016) than in German ports (+20%, 91.000 tonnes)¹⁴.

Supply / Spain: In Galicia in January–June 2017, mussel landings (80.000 tonnes) increased more than 33% over the same period in 2016. In 2016, 224.000 tonnes of mussel were produced, valued at EUR 109 million and representing an increase in value (+19%) and volume (+6%) over 2009¹⁵.

Trade / France: In January–June 2017, French imports of fisheries and aquaculture products increased 8% in value and 1% in volume. For the second consecutive year, cod imports increased (+6% in value and +4% in volume). Lower prices of seabass and seabream were responsible for higher import volumes of these

species (+10% and +14%, respectively). Trout imports increased 17%, representing the equivalent of 6% of French production. By contrast, French imports of salmon were lower, caused by the worldwide increase in prices¹⁶.

Trade / Spain: In January–June 2017, Spanish exports of canned and prepared seafood products rose 22% in value and 16% in volume over the same period in 2016, to reach 104.000 tonnes and EUR 478 million. This is the best result for the first semester in the past ten years. The highest growth rates were recorded for tuna, which is, more than ever, the main product, representing 66% in value and 61% in volume of total exports of canned and prepared seafood. Sardine, mussel, scallop, cuttlefish, and squid also experienced positive growth, while sales of mackerel, octopus, clam, cockle, and anchovy recorded the most significant drops. If the EU remains the main purchaser of Spanish canned seafood products, a remarkable growth was observed in Americas (+30% over the first semester of 2016) and in Oceania (+21%), whereas Spain's presence in Asia was reduced by 37%¹⁷.

Trade / Norway: In August 2017, Norway exported 165.000 tonnes of fish and seafood with a value of EUR 805 million (NOK 7,5 billion). Of these, 90.700 tonnes were Atlantic salmon with a value of EUR 590 million (NOK 5,5 billion). The average price of fresh whole salmon was 6,17 EUR/kg (57,59 NOK/kg), compared with 6,23 EUR/kg (58,12 NOK/kg) in August 2016. Poland and Denmark were the largest EU destination markets for the fresh salmon. At the same time, trout exports decreased 38% in volume, ending at 3.700 tonnes. Japan and the USA were the largest importers of Norwegian trout¹⁸.

Trade / Faroe Islands / Turkey: A free trade agreement between the Faroe Islands and Turkey has entered into force on 1 October 2017. The agreement will guarantee Faroese companies tariff-free access to the Turkish market for all products of importance to the Faroe Islands, including salmon, saithe, mackerel, and herring¹⁹.

3. Case studies

3.1. PRODUCER ORGANISATIONS (POs) IN PORTUGAL

The Portuguese fishing fleet is highly diversified with a wide range of vessels targeting various species. Purse-seine vessels lead in catches with 43% of Portuguese total catches in 2016, followed by multispecies and multi-gear vessels (small-scale and coastal artisanal fleets, 41%) and trawlers (16%).

3.1.1. Number and Representativeness of Producer Organisations

Of 4.075 licensed vessels in 2016, 1.754 were associated with producer organisations (58 more than 2015). That amounts to 43% of all licensed Portuguese vessels (vs. 40% in 2015 and 37% in 2014). POs accounted for 64% of all fish landed (in volume) in Portugal in 2016.

In 2016, 16 POs were recognised in the fishery and aquaculture sector, out of which 13 were on the Portuguese mainland, 2 were in the Azores, and 1 was in Madeira. All of the POs are in the fishery sector. No POs are in the aquaculture sector.

Most POs were established between 1986 and 1990, immediately following Portugal's accession to the EU (then the EEC). Gradually, the POs invested in activities beyond fishing: two POs invested in the processing industry and six POs created new structures and diversified their activities (improving the condition of members' vessels, creating employment opportunities, etc)²⁰.

The most recent Portuguese POs are:

- APARA, association of artisanal fishing of the Aveiro region, established in 2004 as an association and in 2008 as a PO. It represents approximately 200 professional fishermen, operating in sardine purse-seine fishing, lagoon fishing, and local small-scale seawater fishing.
- BIVALMAR, established in Setúbal in 2008 as a PO specialising in the fishing of bivalves: smooth callista (*Callista chione*), solid surf clam (*Spisula solida*), edge shell (*Donax trunculus*), razor shell (*Ensis* spp.), and Norway cockle (*Levicardium crassum*). Bivalmar represents 21 vessels and 150 fishermen licensed to fish bivalves in the ocean.
- ARMALGARVE POLVO, established as an association in 2011 and as a PO in 2016, specialises in fishing octopus.

POs are particularly important in Madeira and in the northern region of the mainland, where they represent 90% of all registered vessels.

Table 3. PROFILE OF PORTUGUESE PRODUCER ORGANISATIONS

Producer Organisation	Founded	Number of members*	Fishing gear used
COOPESCAMADEIRA	1986	92	Small-scale, longline, purse-seine
PROPEIXE	1986	21	Purse-seine
BARLAPESCAS	1986	20	Purse-seine
OPCENTRO	1986	115	Small-scale, purse-seine, trawl, hooks and lines, gill nets
APROPESCA	1986	88	Small-scale, purse-seine
SESIBAL	1986	14	Purse-seine
ARTESANALPESCA	1988	42	Longline, traps
VIANAPESCA	1988	586	Small-scale, purse-seine, teeth bar dredge
CAPA	1990	154	Small-scale, longline, trawl
APASA	1990	35	Pole-and-line
CENTRO LITORAL	2000	35	Small-scale, purse-seine, trawl
OLHAOPESCA	2000	116	Purse-seine, traps, trawl, gill net, teeth bar dredge
APARA	2008	117	Small-scale, purse-seine, trawl, drag nets
BIVALMAR	2008	21	Teeth bar dredge
ARMALGARVE POLVO	2016	100	Pots

* 2014 except Coopescamadeira (2015) and Armalgarve Polvo (2016).

Source: European Commission, European Parliament, Ocean & Coastal Management, EUMOFA.

Table 4. **NUMBER OF VESSELS ASSOCIATED WITH POs BY NUTS 2, ACCORDING TO PLACE OF REGISTRATION (as of 1 January)**

Region	2015		2016	
	Number of vessels	Percentage of total registered vessels	Number of vessels	Percentage of total registered vessels
Continental Portugal	1.438	41	1.482	44
Norte	677	85	677	90
Centro	549	58	549	60
Lisboa	71	10	71	10
Alentejo	0	0	0	0
Algarve	141	15	185	20
Azores	170	28	182	32
Madeira	88	89	90	90
Total	1.696	40	1.754	43

Source: DGRM (Direção-Geral de Recursos Naturais, Segurança e Serviços Marítimos).

An analysis of the landings of vessels associated with POs reveals that the purse-seine fishery is the most represented segment. By contrast, multispecies vessels (*polivalentes*) are far less grouped in POs. Unfavourable regulatory provisions, together with a lack of incentives, are identified as the main reason for weak participation of this category of vessels in POs. Indeed, to be recognised in Portugal, a PO needs to commercialise “at least 15% by weight of the total production in its area.” Further, multispecies vessels usually have small but diversified catches, and their production falls short of the benefits from the withdrawal aid, which has been an incentive for the creation of POs in other fleet segments in the past.

In 2016, the 13 continental POs landed 86.000 tonnes of fresh fish, with three species (chub mackerel, horse mackerel, and sardine) representing 64% of the total.

In 2016, landings by continental POs decreased 13% from 2015, with major decreases registered for mackerel (–60%) and chub mackerel (–41%). This decrease is partly the result of a temporary cessation of fishing of the purse-seine fishery and a shift towards catching more valuable species, such as anchovy, whose catches rose from 2.531 tonnes in 2015 to 6.925 tonnes in 2016.

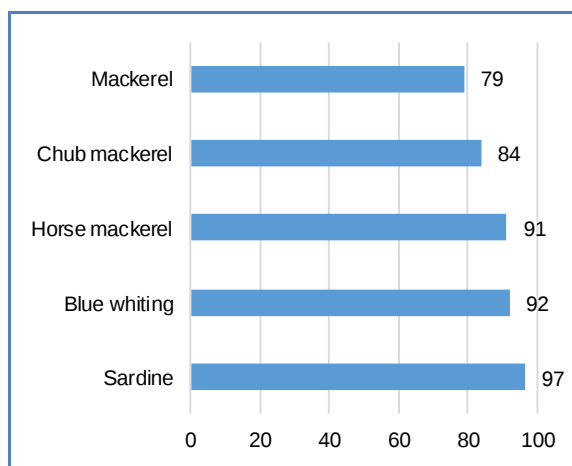
Table 5. **LANDINGS OF FRESH FISH BY POs IN 2016 (tonnes)**

Species	Continental Portugal	Norte	Centro	Lisbon	Alentejo	Algarve
Sardine	13.236	5.512	4.085	419	1.295	1.926
Chub mackerel	23.148	3.087	2.736	8.251	3.807	5.268
Horse mackerel	18.503	2.617	9.720	2.844	763	2.560
Blue whiting	1.429	287	66	18	703	355
Mackerel	489	58	426	1	0	4
Other	29.190	9.632	11.083	4.706	584	3.186
Total	85.995	21.192	28.116	16.238	7.151	13.298

Source: DGRM.

In 2016, POs were responsible for the vast majority of landings of chub mackerel (79%), horse mackerel (91%) and sardines (97%) in Portuguese ports.

Figure 7. **PO TOTAL LANDINGS (CONTINENTAL PORTUGAL; %)**



Source: EUMOFA based on DG MARE data.

3.1.2. The Role of POs in the Sardine Fishery

ANOPCERCO²¹ (National Association of Purse-seine Producer Organisations) represents the interests of Portuguese POs dedicated to purse-seine fishing. Its 120 vessels caught 55.000 tonnes of sardines in 2010.

Figure 8. **CLASSIFICATION OF POs BY TYPE OF ACTIVITY (as of 28 April 2017)**

Activity		
Coastal fishing	Local small-scale fishing	Other types of fishing
	Propeixe Sesibal Vianapesca CAPA Centro Litoral Olhãopesca	APASA APARA Bivalmar
Coopesca Madeira Barlapescas OPCENTRO Apropesca Artesanalpesca Armalgarve Polvo		

Source: DGRM.

The POs are strongly involved in the management of the sardine fishery. They initiated, and successfully completed through ANOPCERCO, the Marine Stewardship Council (MSC) certification process for the Portuguese sardine purse-seine fishery on 10 January 2010. In reaction to the precarious status of the stock and the suspension of the certification in 2012, ANOPCERCO prepared a “Sardine Fisheries Management Plan 2012–2015.” After an initial lifting of the suspension, certification was suspended again in 2014 and withdrawn in January 2015.

Since the withdrawal of the certification, sardine catches of the POs, which had fallen from 27.265 tonnes in 2013 to 15.588 tonnes in 2014, continued to contract to 13.349 tonnes in 2015 and 13.326 tonnes in 2016. The POs, mostly through ANOPCERCO, negotiated with the Ministry that the catch limits would not be as low as the scientific advice, so as to maintain the viability of the fishery. POs then ensured the respect of the catch limits set by the Ministry and of the periods of fishing closure.

For 2017, the Portuguese Ministry of the Sea closed the fishery for the first two months of the year and set catch limits at 6.800 tonnes for the period 1 March–31 July. In all, 98,5% of this quota, i.e. 6.698 tonnes, is awarded to the POs, and 1,5% (102 tonnes) goes to non-PO vessels.

3.1.3. Producer Organisations' activities related to Common Market Organisation

The reforms of the Common Fisheries Policy (CFP) and the Common Organisation of the Markets (CMO) enhance the role of fishery and aquaculture POs in the development of market-oriented activities and in the delivery of CFP objectives.

➤ Production and marketing plans

The CMO regulation requires each PO to submit a production and marketing plan (PMP) for at least its main marketed species, and to prepare an annual report of its activities under the PMP. This is supported through public funding under the European Maritime and Fisheries Fund (EMFF).

In 2014 and 2015, all recognised Portuguese POs provided a PMP, and 12 of them provided an annual report.

An interim assessment of the implementation of PMPs was carried out in 2016. It included a SWOT analysis in respect to POs and PMPs²².

For Portugal, the major strength highlighted is the “good representativeness of POs in their respective areas of competence.” The weaknesses pointed out are the “lack of technical staff with experience in management and marketing at the PO level,” the “poor coordination/collaboration/integration with other POs and processing industries,” and “the difficulties in marketing low-value species.” The needs identified by the study include an “increase in the coordination of actors of the supply chain and development of partnerships with the processing sector.”

The Operational Programme (OP) of the EMFF has programmed EUR 10 million for the PMPs; EUR 1,2 million was committed on 30 June 2017, and EUR 0,5 million has been paid.

➤ Storage aid

In the EMFF Operational Programme, a contribution of EUR 3 million was programmed for the storage aid scheme in Portugal.

No payments were made in 2014 and 2015 related to this mechanism. On 30 June 2017, EUR 0,4 million was committed and paid.

The prices triggering the storage mechanism in 2017 are displayed in Table 6 for the main three species.

They were set by the Portuguese administration based on proposals made by individual POs.

In the first quarter of 2017, average first-sales prices were far above these trigger prices, e.g. 1,02 EUR/kg for horse mackerel and 0,50 EUR/kg for chub mackerel.

Table 6. **PRICES TRIGGERING THE STORAGE MECHANISM IN 2017**

Species	Freshness	Size	Producer Organisation					
			Apropesca	Centro Litoral	OPCentro	Propeixe	Sesibal	Vianapesca
Horse mackerel	Extra	1				-	-	
		2				0,35	0,14	
		3				0,30	0,30	
		4				0,25	0,30	
		5				0,30	0,30	
	A	1				0,80	-	
		2				0,40	0,14	
		3				0,38	0,30	
		4				0,39	0,30	
		5				0,39	0,30	
Chub mackerel	Extra	1	0,29	-	0,25	-	0,40	0,40
		2	0,29	0,30	0,25	0,29	0,40	0,30
		3	0,22	0,20	0,19	0,20	0,23	0,25
		4	0,22	0,14	0,16	-	0,18	0,25
	A	1	0,40	-	0,25	0,40	0,40	0,40
		2	0,36	0,30	0,25	0,36	0,40	0,35
		3	0,24	0,20	0,24	0,24	0,23	0,24
		4	0,19	0,14	0,18	0,19	0,18	0,16
Sardine	Extra	1	-	0,45	0,38	0,60	0,31	0,60
		2	0,60	0,60	0,38	0,60	0,80	0,60
		3	0,08	0,50	0,37	0,40	0,80	-
		4	0,28	-	0,30	0,40	0,70	0,40
	A	1	0,60	0,45	0,38	0,60	0,31	0,60
		2	0,67	0,60	0,38	0,67	0,80	0,67
		3	0,50	0,50	0,35	0,50	0,80	0,50
		4	0,46	0,50	0,25	0,46	0,70	0,46

Source: DGRM.

3.2. CONSUMPTION OF ANIMAL PROTEIN: THE PLACE OF FISH

3.2.1. SUMMARY

Meat currently supplies most of the world's animal protein for human consumption. Although consumption of animal protein from meat is growing in the EU, consumption of fish protein, especially from aquaculture, is growing globally, especially in less-developed countries. Acceptance of protein from plants on land and in the sea (e.g. algae) is also increasing.

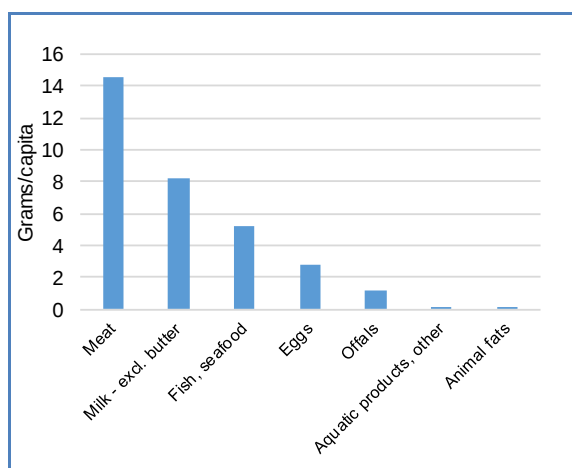
3.2.2. WORLD

As the world population grows rapidly, the demand for additional food sources is also growing, including the demand for animal protein, driven especially by socio-economic changes. This puts pressure on several industries, including meat production from agriculture, aquaculture, and capture fisheries. At the same time, pressure for economically friendly and environmentally sustainable regulations has never been greater.

According to FAO, in 2015, approximately 17% of the animal protein consumed globally originated from fish. Consumption of fish protein is growing globally, especially in less-developed countries. In addition to being a well-known source of protein, fish is a good source of long-chained omega-3 fatty acids (DHA and EPA).

In 2013, the global daily consumption of seafood ranked third among animal protein sources at 5,2 g/capita. This was well behind meat at 14,5 g/capita, and milk (excluding butter) at 8,2 g/capita²³.

Figure 9. **DAILY GLOBAL CONSUMPTION OF ANIMAL PROTEIN PER CAPITA (2013)**

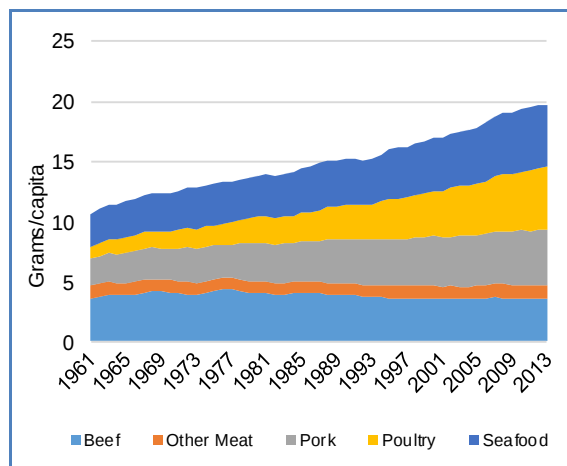


Source: FAO.

From 1961 to 2013, the global annual consumption of selected animal protein sources (beef, seafood, poultry, pork and other meat) increased 86%, from 10,63 g/capita to 19,76 g/capita. While the consumption of beef decreased 2% in the period, poultry (+391%), pork (+113%), and seafood (+95%) increased significantly. In 2013, seafood accounted for 26% of the consumption of the selected animal protein sources

(beef, pork, poultry, and seafood), followed by poultry (26%), pork (24%), beef (18%), and other meat (6%).

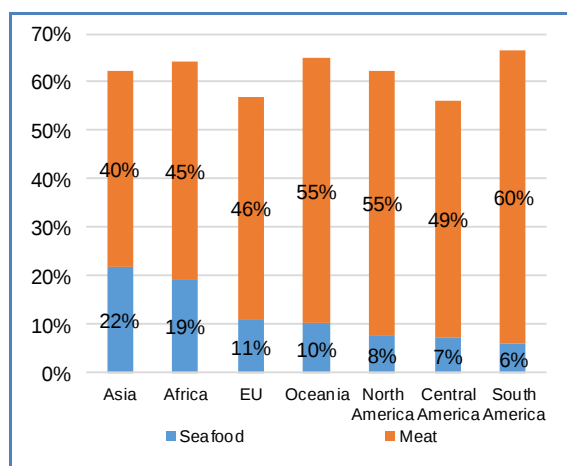
Figure 10. **CHANGES IN GLOBAL CONSUMPTION OF SELECTED ANIMAL PROTEIN SOURCES**



Source: FAO.

In 2013, Asia was the world's largest consumer market for seafood (22%), followed by Africa (19%) and the EU (11%). In comparison, meat (including beef, pork, and poultry) accounted for 60% of the total consumption in South America, 55% in North America and Oceania, and more than 40% in the rest of the markets studied.

Figure 11. **THE SHARE OF SEAFOOD CONSUMPTION PER CAPITA IN VARIOUS MARKETS (2013)**



Source: FAO.

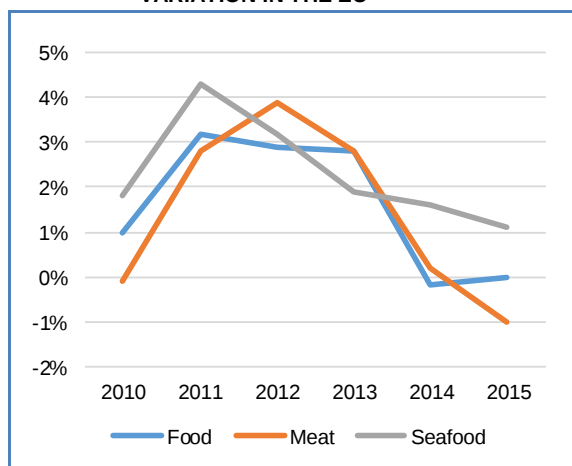
3.2.3. THE EU MARKET

The EU production of animal protein has increased in recent years. Beef production increased from 7,2 million tonnes in 2013 to 7,8 million tonnes in 2016; pork increased 1,2% from 2015 to 2016, ending at 23,2 million tonnes²⁴. For seafood, an increasing trend was observed, with a 10% increase in production from 2012 to 2015, ending at 5,88 million tonnes. The self-sufficiency rate for seafood in the EU in 2014 was 47,5%. The EU still relied on imports to cover the domestic demand for species such as cod, tuna, salmon, and Alaska pollock²⁵. By contrast, the EU did

not import any pork or poultry for which the self-sufficiency was 111% and 103%, respectively. For beef it was close to 100%²⁶.

From 2013 to 2015, the average fish consumption in the EU decreased 1,4% to 25,11 kg/capita with tuna, cod, and salmon as the top three species consumed. The consumer prices of seafood increased continuously between 2010 and 2015, however, with a declining trend²⁷.

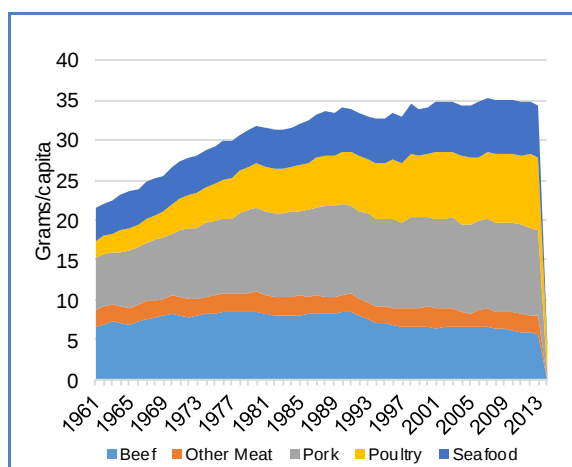
Figure 12. **CHANGES IN CONSUMER PRICE VARIATION IN THE EU**



Source: EUMOFA, *The EU fish market - 2016 edition*.

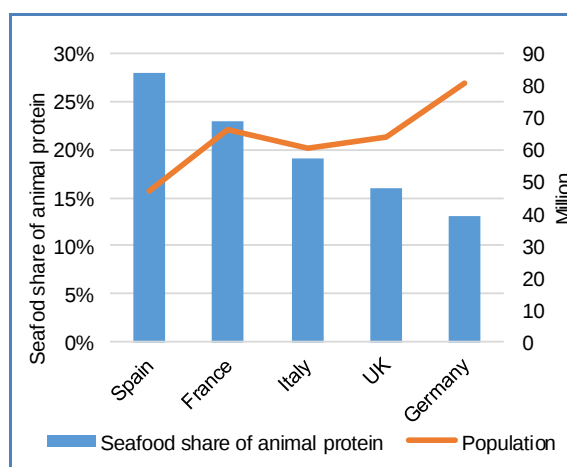
From 1961 to 2013, EU consumption of animal protein from the main sources increased 60%, mainly the result of a strong increase in poultry (+335%), but also in pork (+64%) and seafood (+61%). Poultry consumption increased in recent years because of increased availability resulting from production costs lower than e.g. red meat²⁸.

Figure 13. **CHANGES IN EU CONSUMPTION OF SELECTED ANIMAL PROTEIN SOURCES**



Source: FAO.

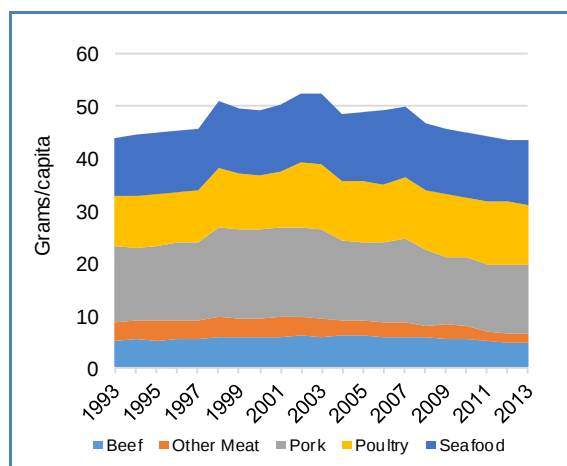
Figure 14. **SEAFOOD'S SHARE OF ANIMAL PROTEIN CONSUMED, IN THE MOST POPULATED EU MEMBER STATES (2013)**



Source: FAO.

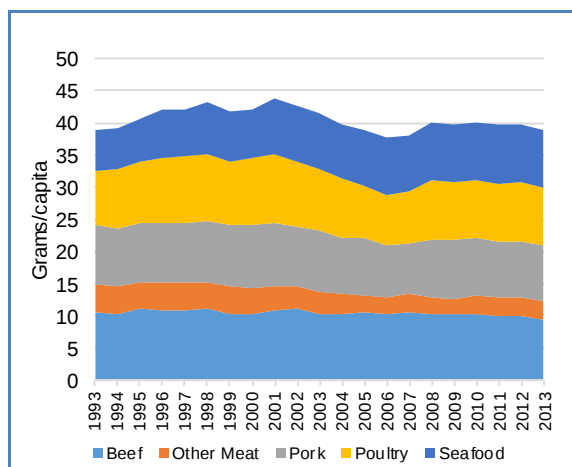
In 2013, the largest consumer market per capita for animal protein in the EU was Spain with almost 44 g/capita per day. From 1998 to 2007, Spanish consumption peaked and was stable at around 50 g/capita, but dropped the next years, mainly thanks to the financial crisis. While other product sources for animal protein continued to decrease after the financial crisis, seafood recovered quickly, and in 2013, it was second at 12,39 g/capita, just below pork (12,99 g/capita).

Figure 15. **CHANGES IN SPANISH CONSUMPTION OF SELECTED ANIMAL PROTEIN SOURCES**



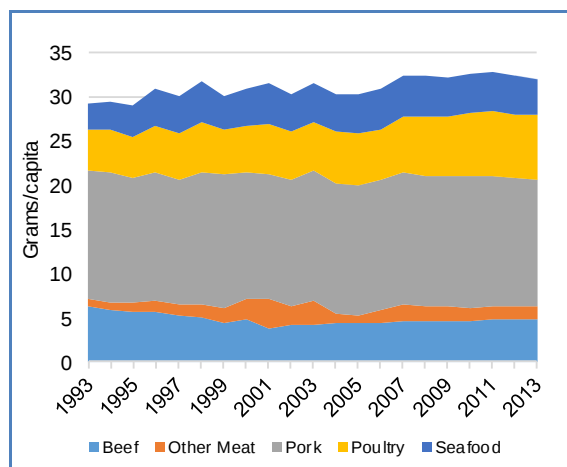
Source: FAO.

The second largest consumer market per capita for animal protein in the EU in 2013 was France, at almost 40 g/capita daily. The French market was not affected by the financial crisis in the same way as the Spanish market, staying at around 40 g/capita since 2003. Beef was the largest source of animal protein in the French market in 2013 at 9,4 g/capita, followed by seafood (8,96), poultry (8,76), and pork (8,69). A large part of the French seafood consumption is farmed Atlantic salmon in different presentations and preservations. In 2014, France consumed an estimated 200.000 tonnes (round weight) of salmon.

Figure 16. **CHANGES IN FRENCH CONSUMPTION OF SELECTED ANIMAL PROTEIN SOURCES**

Source: FAO.

Germany, the most populous EU Member State, has a lower daily consumption per capita of animal protein than the other densely populated Member States (France, the UK, Italy, and Spain), at 31,99 g/capita. Between 2000 and 2013, per capita consumption of seafood ranged between 4,11 g/capita and 4,67 g/capita. This was also lower than any other large EU Member State. Although seafood consumption in Germany is relatively low, consumption of pork has been greater than of other animal protein for a long time, because of pork's traditional place in consumption. From the start of 2000, consumption has been stable between 14,50 and 15,00 g/capita, making Germany by far the largest consumer of pork in the EU, followed by Spain at 12,99 g/capita (2013), but with a significantly lower population.

Figure 17. **CHANGES IN GERMAN CONSUMPTION OF SELECTED ANIMAL PROTEIN SOURCES**

Source: FAO.

3.2.4. FUTURE DEVELOPMENT

As the global population continues to grow rapidly, the demand for protein will also grow. So will the demand for animal protein, but within certain limits. This is why protein sources such as plants on land and in the sea (e.g. algae) and insects are becoming more prominent. However, researchers remain skeptical about the consumption of insects, especially whole insects, because they contain gut microflora, which may affect microbiological quality of the product²⁹.

Although capture fisheries depend on wild stocks, aquaculture production is done under controlled circumstances, allowing for the production volume to be increased at any time. Therefore, a shift in the production source is foreseen in the near future for seafood: FAO estimate that the share of global aquaculture production will increase from 44% to 56% between 2015 and 2025, while capture fisheries will decrease from 52% to 48%.

It is expected that Asian countries such as China and Vietnam will continue to increase their aquaculture production significantly during the period, but that Norway too will contribute. The economic recovery in Japan, Europe, and North America is expected to lead to an increase in seafood consumption. However, developed countries' share of imports is projected to decrease from 54% in 2015 to 53% in 2025. This is mainly because developing countries will increase their imports of raw materials to be processed and subsequently re-exported in response to stagnating domestic fishery production in developed countries³⁰.

4. Consumption

HOUSEHOLD CONSUMPTION IN THE EU

In June 2017, the consumption of fresh fisheries and aquaculture products decreased from June 2016 in both volume and value in Denmark (-11% and -4%, respectively), Hungary (-42% and -48%), Poland (-12% and -4%), and Spain (-5% and -4%). In the Netherlands, volume decreased and value remained unchanged. In the UK, volume increased and value decreased. In Germany, France, Ireland, Italy, Portugal and Sweden volume and value increased.

The largest increase in volume and value in June 2017 was observed in Sweden (+20% in volume and +17% in value), while the largest drop was registered in Hungary.

Compared with May 2017, value decreased only in France (-2%) and Poland (-12%), among the Member States surveyed. Volume decreased in Hungary (-2%) and Poland (-15%). In the rest of the countries surveyed, value and volume increased.

Table 7. JUNE OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)

Country	Per capita consumption 2014* (live weight equivalent) Kg/capita/year	June 2015		June 2016		May 2017		June 2017		Change from June 2016 to June 2017	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	22,1	581	8,95	626	9,08	494	7,98	560	8,71	11%	4%
Germany	13,3	3.979	58,63	4.850	71,73	4.667	70,95	4.929	74,33	2%	4%
France	34,4	15.996	167,84	15.666	175,62	15.121	186,84	15.906	182,86	2%	4%
Hungary	4,6	310	1,05	335	2,16	196	0,99	193	1,12	42%	48%
Ireland	23,0	1.366	18,19	1.231	17,31	1.075	14,97	1.260	18,04	2%	4%
Italy	28,9	30.531	244,74	30.740	253,98	24.946	217,40	32.491	273,01	6%	7%
Netherlands	22,6	2.068	31,71	2.103	32,61	1.631	25,98	1.987	32,65	6%	0%
Poland	13,0	3.375	19,14	3.285	17,90	3.373	19,51	2.879	17,15	12%	4%
Portugal	55,3	4.775	26,74	4.503	27,45	4.053	25,84	4.688	29,48	4%	7%
Spain	46,2	55.230	389,06	53.359	394,19	49.206	370,30	50.730	379,48	5%	4%
Sweden	33,2	1.006	11,59	739	9,74	516	7,69	890	11,43	20%	17%
UK	24,9	28.428	341,71	28.354	313,03	23.368	249,31	28.545	302,16	1%	3%

Source: EUMOFA, based on Europanel (updated 13.09.2017).

* 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>

Generally, the June consumption of fisheries and aquaculture products followed an increasing trend in both volume and value in Germany and Italy. Denmark, Ireland, Poland, Spain and Sweden followed a decreasing trend in both volume and value. In the rest of the Member States analysed, an increasing trend was observed in value, except in the UK, where the opposite was observed. A decreasing trend was observed in volume.

In June, in the past three years, the household consumption in volume of fresh fish products was below the annual average in most Member States analysed, except for Ireland (+28%), Italy (+18%), Sweden (+8%) and the UK (+14%). The opposite trend was observed in

value. Value was above the annual average in most Member States. However, in Denmark (-17%), France (-5%), Hungary (-45%), Poland (-31%), and Spain (-5%), value was below the yearly average. In Ireland, value was 35% above the annual average, the highest for the period surveyed. It was the highest also in volume (+28%). The lowest quantity registered below the average in volume was in Hungary (-60%), Poland (-44%), and Denmark (-22%).

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

4.1. FRESH OCTOPUS



Habitat: A benthic species living in temperate and tropical waters, mainly in habitats, such as rocks, coral reefs, and grass beds³¹.

Catch area: central-east Atlantic off the coast of Africa, from Morocco to Senegal; the Mediterranean Sea; Inland Sea of Japan³².

Main producing countries in Europe: Italy, Greece, Portugal, Spain.

Production method: Caught.

Main consumers in the EU: Italy, Greece, Portugal, Spain.

Presentation: Whole or chopped.

Preservation: Fresh, marinated, canned, smoked and dried.

Ways of preparation: Grilled, boiled, seasoned.

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

First sales: France (6/2017), Italy (6/2017), Portugal (6/2017, 3/2016, 1/2015, February 2013, August-September 2013)

Case study: Octopus in Portugal (May 2013)

Consumption: Italy (1/2016), Portugal (1/2016)

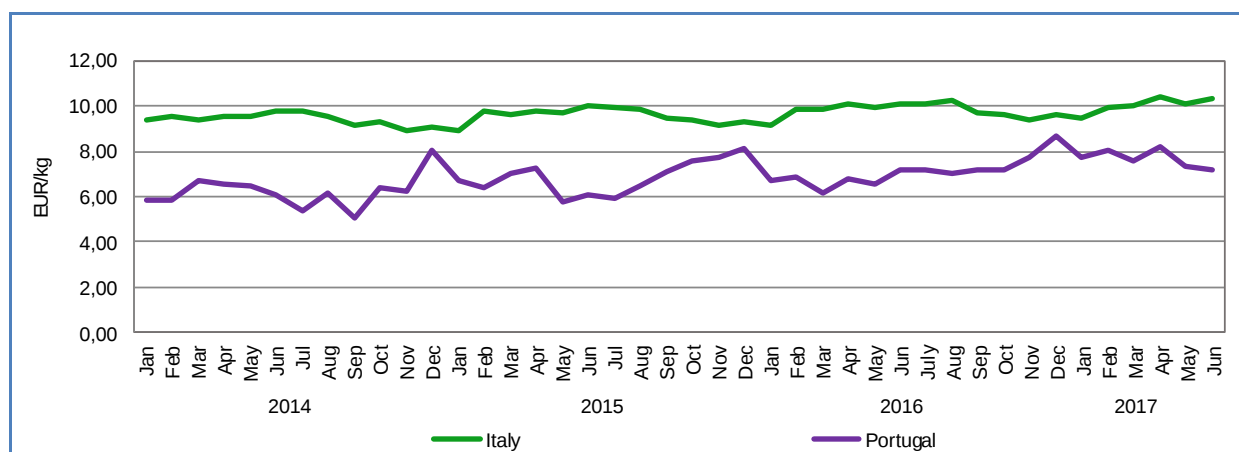
GENERAL OVERVIEW OF HOUSEHOLD CONSUMPTION IN ITALY AND PORTUGAL

Overall, per capita consumption in Italy and Portugal is above the EU average. In Italy, per capita consumption of fish and seafood products was 28,9 kg in 2014. It registered a 4% increase over the previous year. Of the EU Member States, Portugal displayed the highest per capita consumption of fish and seafood products, 55,3 kg in 2014. It was two times higher than the EU average per capita consumption of 25,5 kg. However, it decreased 2% from 2013. In Italy, the per capita consumption was 13% higher than the EU average, but 46% lower than

Portugal. See more on EU per capita consumption in Table 7.

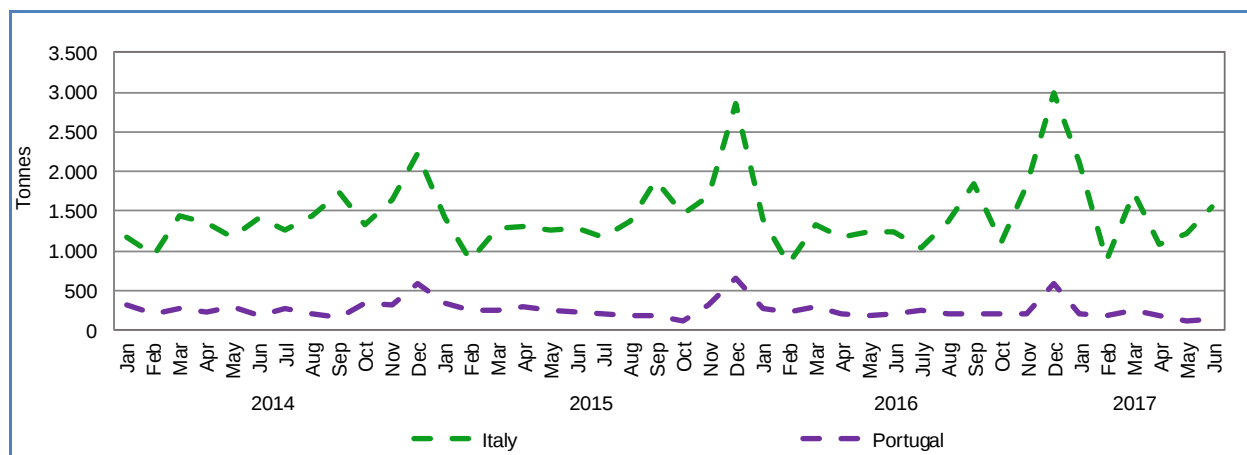
Retail prices of octopus fluctuated during the period January 2014–June 2017 in Portugal. In Italy, prices remained relatively stable. A similar trend was also observed in volume. Volume sold and prices of octopus were six and nearly two times higher, respectively, in Italy than in Portugal. Both countries experience the highest volume peaks of consumed octopus in winter, particularly in December.

Figure 18. RETAIL PRICE OF FRESH OCTOPUS



Source: EUMOFA (updated 13.09.2017).

Figure 19. VOLUME SOLD OF FRESH OCTOPUS



Source: EUMOFA (updated 13.09.2017).

CONSUMPTION TREND IN ITALY

Long-term trend, January 2014–June 2017: increased both in price and volume.

Average price: 9,40 EUR/kg (2014), 9,56 EUR/kg (2015), 9,79 EUR/kg (2016).

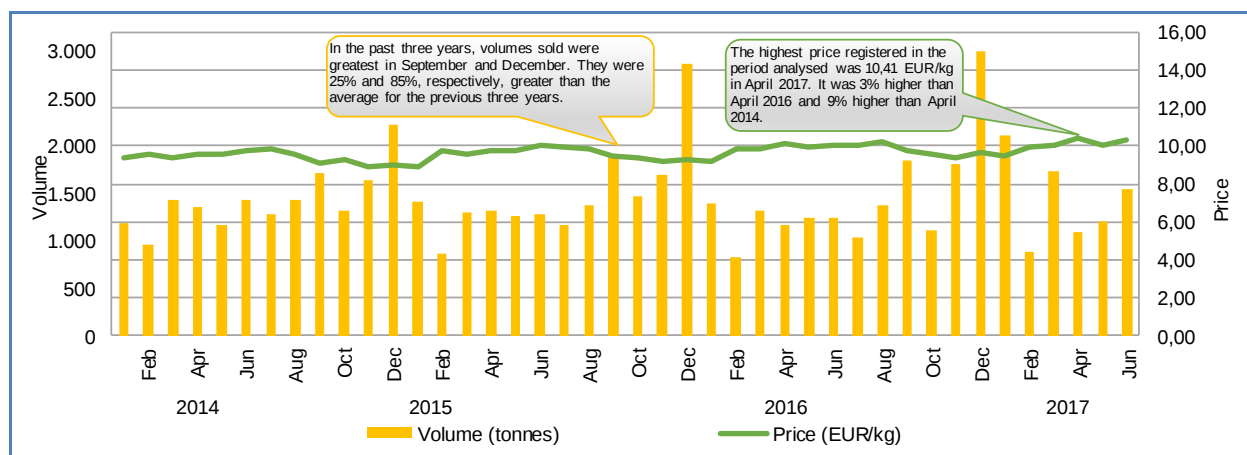
Total consumed volume: 17.116 tonnes (2014), 17.870 tonnes (2015), 17.346 tonnes (2016).

Short-term trend, January–June 2017: increasing in value and decreasing in volume.

Average price: 10,05 EUR/kg.

Total consumed volume: 8.574 tonnes.

Figure 20. RETAIL PRICE AND VOLUME OF FRESH OCTOPUS IN ITALY



Source: EUMOFA (updated 13.09.2017).

CONSUMPTION TREND IN PORTUGAL

Long-term trend, January 2014–June 2017: increased in price and decreased in volume.

Average price: 6,23 EUR/kg (2014), 6,85 EUR/kg (2015), 7,10 EUR/kg (2016).

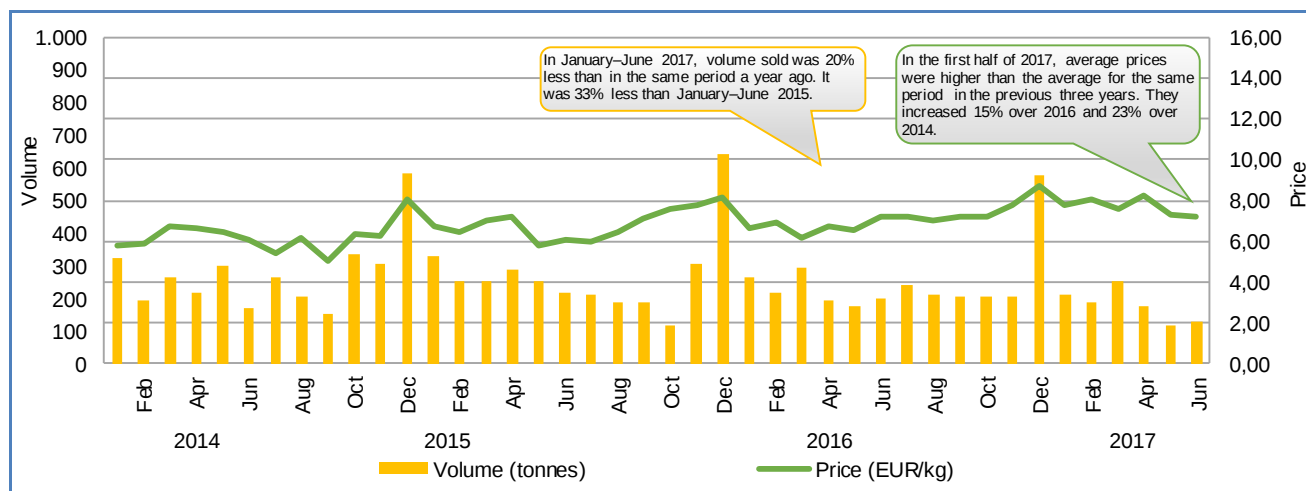
Total consumed volume: 3.312 tonnes (2014), 3.242 tonnes (2015), 2.987 tonnes (2016).

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

Average price: 7,69 EUR/kg.

Total consumed volume: 1.071 tonnes.

Figure 21. RETAIL PRICE AND VOLUME OF FRESH OCTOPUS IN PORTUGAL

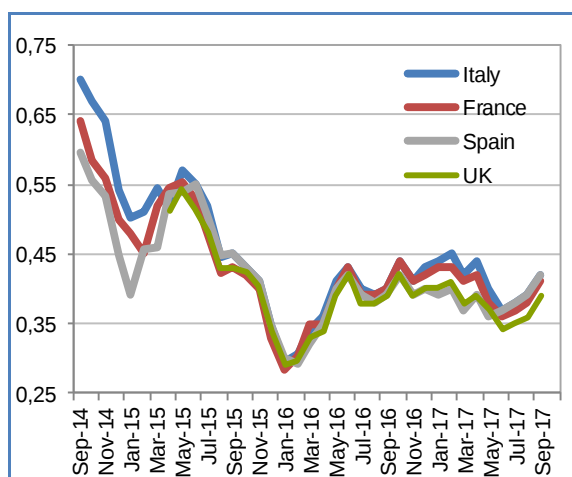


Source: EUMOFA (updated 13.09.2017).

5. Macroeconomic context

5.1. MARINE FUEL

Figure 22. **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 (September 2015–September 2017).

In September 2017, the fuel price in the French ports of Lorient and Boulogne was 0,41 EUR/litre, an 8% increase over August 2017. It increased 2% over September 2016.

In the Italian ports of Ancona and Livorno, the average price of marine fuel in September 2017 was 0,42 EUR/litre. It increased 8% over the previous month and 5% over September 2016.

The price of marine fuel in the ports of A Coruña and Vigo, Spain, in September 2017, increased 8% to 0,42 EUR/litre over both August 2017 and September 2016.

The fuel price observed in the UK ports of Grimsby and Aberdeen was 0,39 EUR/litre in September 2017, an 8% increase over the previous month. Compared with September 2016, the fuel price remained stable.

5.2. FOOD AND FISH PRICES

In August 2017, annual EU inflation was 1,7%, up from 1,5% in July 2017. A year earlier, the rate was 0,3%. In June 2017, the lowest annual rates were recorded in Ireland (+0,4%), Cyprus (+0,5%), and Greece and Romania (+0,6%), while the highest annual rates were registered in Lithuania (+4,6%), Estonia (+4,2%), and Latvia (+3,2%).

Compared with July 2017, annual inflation rose in 20 Member States, remained stable in 5 (the Czech Republic, Denmark, Malta, the Netherlands, and Poland), and fell in 3 (Greece, Romania, and Sweden).

In August 2017, prices of food and non-alcoholic beverages decreased 0,1%, while prices of fish and seafood increased slightly, 0,7%, compared with July 2017.

Compared with August 2016, both food and fish prices increased 1,7% and 3,7%, respectively. Compared with August 2015, fish and seafood prices increased 7,5%, while food and non-alcoholic beverages increased 2,5%.

Table 8. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)**

HICP	Aug 2015	Aug 2016	Jul 2017	Aug 2017
Food and non-alcoholic beverages	99,40	100,19	101,98	101,88
Fish and seafood	100,19	103,83	106,92	107,68

Source: Eurostat.

5.3. EXCHANGE RATES

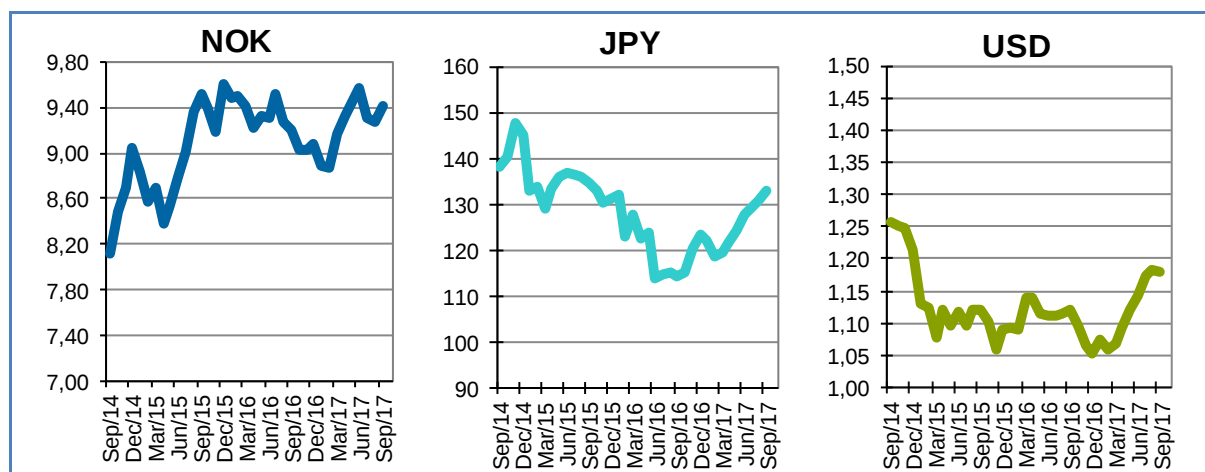
In September 2017, the euro depreciated against the US dollar (-0,2%), and appreciated against the Japanese yen (+1,5%) and the Norwegian krone (+1,4%), compared with August 2017. In the past six months, the euro has fluctuated around 1,1 against the US dollar. Compared with September 2016, the euro has appreciated 5,3% against the US dollar, 16,3% against the Japanese yen, and 2,3% against the Norwegian krone.

Table 9. **THE EURO EXCHANGE RATES AGAINST THREE SELECTED CURRENCIES**

Currency	Sep 2015	Sep 2016	Aug 2017	Sep 2017
NOK	9,5245	8,9865	9,2790	9,4125
JPY	134,69	113,09	130,81	132,82
USD	1,1203	1,1161	1,1825	1,1806

Source: European Central Bank.

Figure 23. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

5.4. EUROPEAN UNION ECONOMIC OVERVIEW

During the second quarter of 2017, seasonally adjusted GDP rate increased 0,7% compared with the previous quarter. In the first quarter of 2017, GDP has grown by 0,5%. Compared with the same quarter of 2016, seasonally adjusted GDP rose 2,4% in the second quarter of 2017, after +2,1% in the previous quarter.

Among the EU Member States, in April–June 2017, the highest GDP increase was registered in Sweden (+1,1%) and reached 1,7% up from 0,6% in the previous quarter. It was followed by the Czech

Republic with a GDP 2,5%, up from 1,5% in January–March 2017. In the Netherlands, the GDP increased 0,9% to 1,5%, up from 0,6%. The highest GDP decrease was recorded in Finland from 1,2% in the first quarter of 2017 to 0,4% in the second quarter. It was followed by Luxembourg and Portugal, where GDP decreased with 0,7% to 0,6% and 0,3%, respectively. In Denmark, Greece, France, Italy, Poland and Slovakia, the GDP remained unchanged.

Compared with the same quarter a year ago, the highest GDP increase of 5,7% was registered in Romania, followed by Estonia and Slovenia, both 5,2%³³.

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

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

Global supply: European Commission; European Parliament; Statistics Iceland; Office national des pêches, Morocco; Fisch-Informationszentrum e. V., Germany; FranceAgriMer; ANFACO; Norwegian Seafood Council; The Government of the Faroe Islands.

Case studies: EUMOFA; European Commission; European Parliament; Ocean & Coastal Management; Direção-Geral de Recursos Naturais, Segurança e

Serviços Marítimos, Portugal; European Environmental Agency; FAO; EU Meat Market Observatory; DG AGRI.

Consumption: EUMOFA; EUROPANEL; FAO.

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

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/2106/en>

⁴ https://ec.europa.eu/fisheries/marine_species/wild_species/anchovy_en

⁵ [http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32006R1967R\(01\)&from=EN](http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32006R1967R(01)&from=EN); Monthly Highlights 3/2017.

⁶ <http://www.fao.org/fishery/species/2910/en>

⁷ [http://www.europarl.europa.eu/RegData/etudes/STUD/2015/563412/IPOL_STU\(2015\)563412_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2015/563412/IPOL_STU(2015)563412_EN.pdf)

⁸ <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:01998R0850-20140101&from=EN> ; Monthly Highlights 6/2016.

⁹ The State of Mediterranean and Black Sea Fisheries, GFCM (2016).

¹⁰ <http://data.consilium.europa.eu/doc/document/ST-6575-2017-INIT/en/pdf>

¹¹ Directorate of Fisheries, Ministry of Agriculture of Croatia.

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

¹³ <http://www.onp.ma/wp-content/uploads/2017/08/RAPPORT-STATISTIQUE-JUILLET-2017.pdf>

¹⁴ http://www.fischinfo.de/images/broschueren/pdf/FIZ_DF_2017.pdf

¹⁵ <http://www.xunta.gal/notas-de-prensa/-/nova/24462/descargas-mexillon-galicia-aumentaron-mais-dun-33-primeiro-semester-ano-con-respecto>

¹⁶ <http://www.franceagrimer.fr/content/download/53427/515906/file/CPresseFranceAgriMerCSmer120917.pdf>

¹⁷ <http://www.anfaco.es/es/categorias.php?var1=Noticias&var2=Noticias&var3=&nar1=0&nar2=718&nar3=1748>

¹⁸ <https://en.seafood.no/news-and-media/news-archive/norwegian-seafood-exports-grew-by-7-per-cent-in-august/>

¹⁹ <http://www.government.fi/news/news/the-free-trade-agreement-with-turkey-entered-into-force/>

²⁰ Adapting to environmental and market change: insights from Fish Producer Organisations in Portugal in Ocean & Coastal Management, December 2014.

²¹ ANOPCERCO is not an association of POs as defined by Article 9 of Reg. 1379/2013.

²² <https://publications.europa.eu/fr/publication-detail/-/publication/15571c4b-e137-11e6-ad7c-01aa75ed71a1>

²³ FAO statistics.

²⁴ https://ec.europa.eu/agriculture/market-observatory/meat_en

²⁵ <http://www.eumofa.eu/documents/20178/77960/The+EU+fish+market+-+2016+Edition.pdf>

²⁶ https://ec.europa.eu/agriculture/beef-veal_en; https://ec.europa.eu/agriculture/pigmeat_en; https://ec.europa.eu/agriculture/poultry_en

²⁷ <http://www.eumofa.eu/documents/20178/77960/The+EU+fish+market+-+2016+Edition.pdf>

²⁸ <http://www.fao.org/3/a-BO100e.pdf>

²⁹ <http://www.mdpi.com/2304-8158/6/7/53>

³⁰ <http://www.fao.org/3/a-i5555e.pdf>

³¹ <http://www.eumofa.eu/documents/20178/104905/Monthly+Highlights+-+No.+6-2017.pdf>

³² <http://www.eumofa.eu/documents/20178/104905/Monthly+Highlights+-+No.+6-2017.pdf>

³³ <http://ec.europa.eu/eurostat/documents/2995521/8213935/2-07092017-AP-EN.pdf>