European Commission

Monthly Highlights

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EUMOFA

European Market Observatory for Fisheries and Aquaculture Products

In this issue

In May 2018, first–sales value and volume increased in Denmark, Estonia, Norway and Sweden over May 2017. In the same period, they dropped in Belgium, Latvia, Lithuania, Poland, and the UK.

Over the past three years, average prices of European perch were the highest in Denmark (2,50 EUR/kg), followed by Estonia (2,28 EUR/kg) and Poland (1,94 EUR/kg). Average price of pike-perch in Denmark (8,33 EUR/kg) was 106% higher than that in Estonia (4,05 EUR/kg), and 99% higher than in Poland (4,18 EUR/kg).

Extra-EU import prices of Ecuadorian tropical shrimp continued to fall amid a global supply glut. Frozen tilapia from China continued a long-run rise in price.

In January–April 2018, the average retail price of fresh gilthead seabream for household consumption was the highest in France (11,39 EUR/kg) and the lowest in Portugal (6,41 EUR/kg).

EU consumption of mackerel was 1,07 kg per capita in 2016, which places mackerel in seventh place on the list of top fish species consumed in the EU.

In 2017, Malagasy exports to the EU reached EUR 142 million and 21.318 tonnes, mostly frozen shrimp and canned tuna. The main EU partner for Malagasy seafood is by far France, accounting for 77% of the EU import value from Madagascar in 2017.

In Croatia in 2017, the marine aquaculture production increased by 5% over 2016, while freshwater aquaculture experienced a decrease of 19%.

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1 First sales in Europe

In January–May 2018, 11 EU Member States (MS) and Norway reported first-sales data for 11 commodity groups[1].

1.1 Compared to the same period last year

Increases in value and volume: Denmark, Estonia and Sweden experienced growth in first-sales value and volume. In Sweden, first sales grew by 36% in value and 97% in volume due to high supply of crustaceans and small pelagics. In Denmark, first sales significantly rose mainly because of high catches of blue mussel and European flounder, whereas in Estonia the growth was due to sprat.

Decreases in value and volume: In Belgium, France, Italy, Latvia, Portugal, and the UK, a drop was observed in both volume and value terms. The decrease in first sales was particularly high for Latvia and the UK. For the latter it was result of declined supplies of mackerel, haddock, and scallop. In Latvia, lower supplies of sprat and herring caused the overall drop.

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

	January–May 2016		January–May 2017		January–May 2018		Change from January–May 2017	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
BE	7.548	28,34	6.863	25,64	6.151	25,44	-10%	-1%
DK	75.926	122,39	77.514	119,57	84.751	128,10	9%	7%
EE	32.239	7,27	28.125	6,25	29.791	6,59	6%	5%
FR	81.235	268,08	81.015	273,91	77.796	265,42	-4%	-3%
IT	32.882	127,31	36.208	131,06	33.249	127,11	-8%	-3%
LV	27.140	5,93	30.398	6,30	22.245	4,24	-27%	-33%
LT	1.175	0,812	1.011	0,94	1.084	0,86	7%	-8%
NO	1.328	1057,24	1.435	1077,67	1.621	1060,06	13%	-2%
PL	61.717	19,95	57.805	17,93	58.424	16,72	1%	-7%
PT	32.449	65,42	30.955	73,91	27.803	67,86	-10%	-8%
SE	61.902	35,13	34.461	23,27	67.863	31,66	97%	36%
UK	171.000	305,94	148.879	266,09	98.682	176,88	-34%	-34%

Source: EUMOFA (updated 17.07.2018); volume data is reported in net weight.
**Partial data. First-sales data for Italy covers 229 ports (approximately 50% of the total landings).*

[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.

1.2 In May 2018

Increases in value and volume: First sales grew in Denmark, Estonia, Norway, and Sweden over a year earlier. The increase in volume terms was particularly high for Sweden, due to herring, the most important species landed, which recorded a rise by 30% in value and by 43% in volume. First-sales value in Denmark increased for common sole and Northern shrimp, whereas volume grew for blue mussel and European flounder.

Decreases in value and volume: Drops were registered in Belgium, Latvia, Lithuania, Poland, and the UK. The decreases were particularly high in Belgium, due largely to lower supplies of flatfish species. Poland experienced a strong decrease in first sales mainly because of lower catches of groundfish and small pelagics.

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

	May 2016		May 2017		May 2018		Change from May 2017	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
BE	1.189	4,61	1.126	4,62	668	2,53	-41%	-45%
DK	18.802	29,70	15.857	26,03	16.622	29,75	5%	14%
EE	6.622	1,45	7.011	1,70	7.057	1,76	1%	4%
FR	16.604	55,06	16.548	54,32	16.632	52,54	1%	-3%
IT	8.799	33,83	10.928	36,84	10.353	37,14	-5%	1%
LV	2.383	0,56	3.904	0,88	2.492	0,57	-36%	-35%
LT	375	0,21	305	0,21	290	0,19	-5%	-9%
NO	174.073	122,27	192.836	123,04	214.610	132,86	11%	8%
PL	9.214	2,96	8.862	2,83	5.121	1,30	-42%	-54%
PT	11.581	16,08	9.108	15,59	9.117	16,68	0%	7%
SE	5.990	6,33	5.618	5,30	6.857	5,34	22%	1%
UK	22.936	57,09	17.800	43,99	14.010	36,96	-21%	-16%

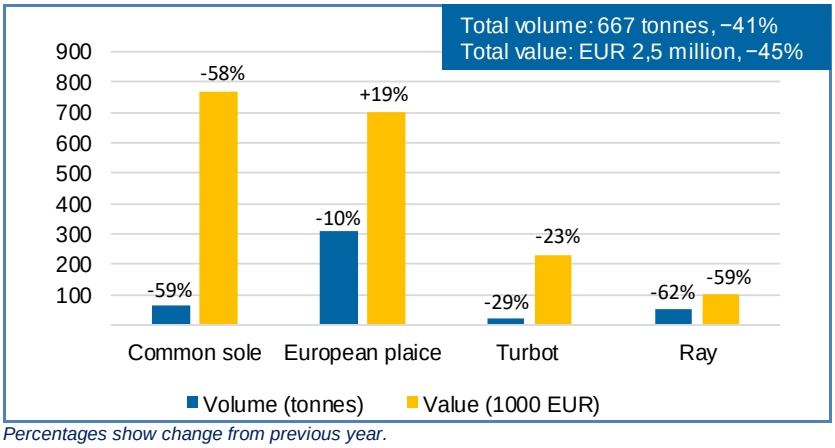
Source: EUMOFA (updated 17.07.2018); volume data is reported in net weight.
**Partial data. First-sales data for Italy covers 229 ports (approximately 50% of the total landings).*

The most recent first-sales data for **June 2018** available on EUMOFA can be accessed **here.**

1.3 First sales in selected countries

In **Belgium** in **January–May 2018**, first sales were almost stable in value but lower in volume, compared with January–May 2017. The species most responsible for the negative trend in volume were European plaice (−6%), monk (−48%), and gurnard (−32%). In **May 2018**, both first-sales value and volume sharply decreased compared with May 2017. Ray and flatfish species were the main contributors for such decreases. Due to limited supply average prices increased for the major species, especially for European plaice (+31%) and monk (+23%).

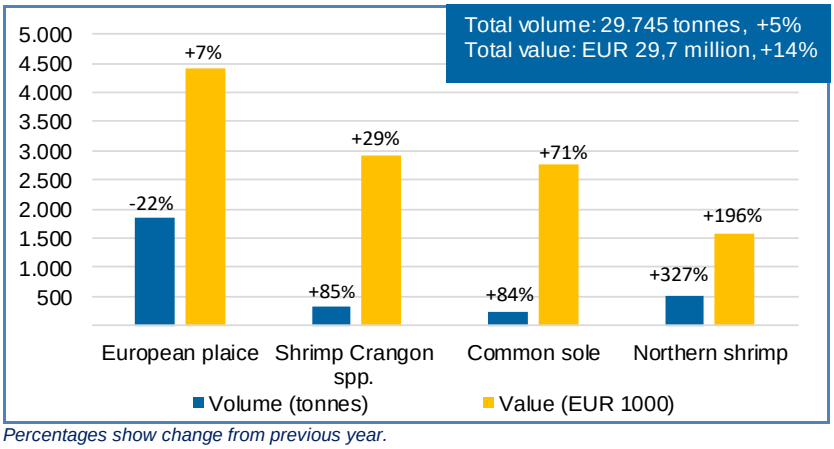
Figure 1. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN BELGIUM, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

In **Denmark** in **January–May 2018**, first–sales value and volume increased by 7% and 9%, respectively, compared with the same period in 2017. Norway lobster, mussel *Mytilus* spp., Northern shrimp and shrimp *Crangon* spp. were the main species responsible for such trends. A positive trend continued in **May 2018** as first-sales value and volume increased thanks to European plaice and Northern shrimp. The same species registered decreases in average price by 7% (11,88 EUR/kg) and 31% (3,11 EUR/kg), respectively.

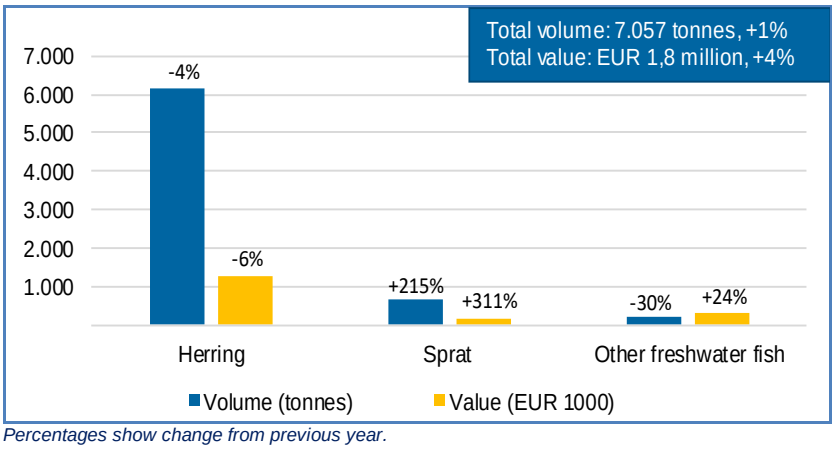
Figure 2. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN DENMARK, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

In **January–May 2018**, **Estonia** saw increases in both first-sales value (+5%) and volume (+6%) over the same period a year before. These decreases were caused by herring, which is the most important species in terms of volume. In **May 2018**, the increasing trend continued, but to a lesser extent, in both first-sales value and volume, compared to May 2017 due to sprat. Only herring and pike-perch experienced decreases in average prices by 2% (to 0,20 EUR/kg) and 4% (to 4,37 EUR/kg), respectively, whereas the remaining species registered increases.

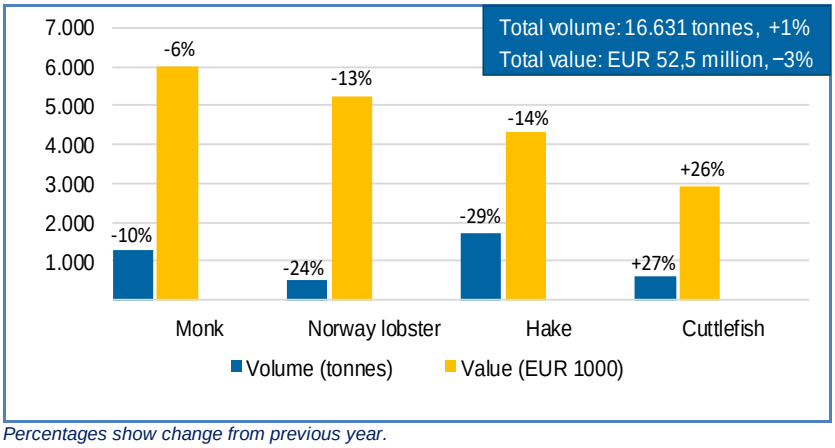
Figure 3. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN ESTONIA, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

In **France** in **January–May 2018**, first sales slightly decreased in both value (−3%) and volume (−4%) from the same period in 2017. Lower supply of monk, hake and Norway lobster were among the main factors for such trends. In **May 2018**, the same species were responsible for a slight decrease in first-sales value (−3%), whereas scallop, mackerel and clam contributed to the overall increase in volume (+1%) compared to May 2017. Due to a decrease in volume, Norway lobster and hake experienced increased average prices by 14% and 21%, respectively.

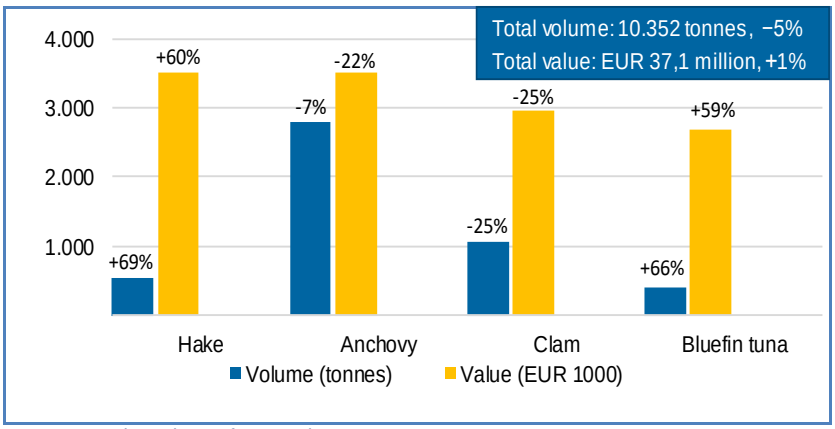
Figure 4. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN FRANCE, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

In **Italy** in **January–May 2018**, first sales decreased by 3% in value and 8% in volume. Clam and anchovy were the species responsible for such decreases. Increased supply of high-priced species such as hake and bluefin tuna were behind the overall increase in first-sales value in **May 2018**, compared to the same month in 2017. The first-sales average prices of all species increased by 6% due to lower supply in May 2018, compared to the same period in 2017.

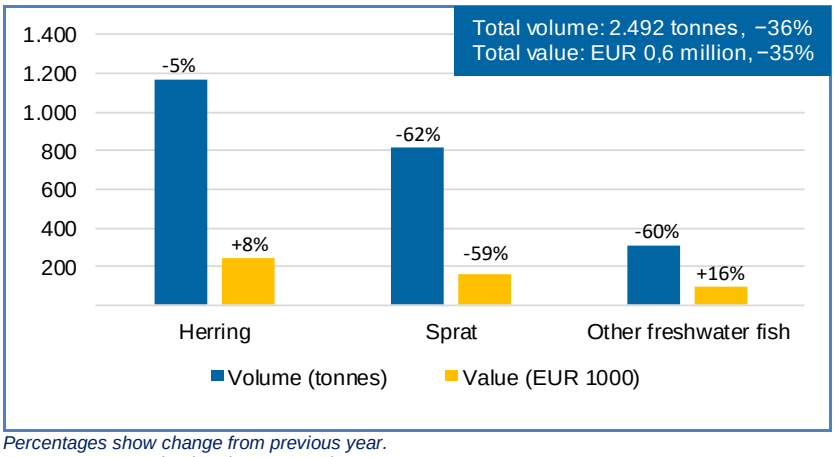
Figure 5. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN ITALY, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

In **Latvia** in **January–May 2018,** first sales decreased in value (−33%) and volume (−27%) from the same period a year ago. This was due to lower supplies of herring and sprat, which are the most important species in Latvian fisheries. **May 2018** saw continued decreases in value and volume mainly due to sprat as well as cod. Average prices increased the most for herring – up by 14% at 0,20 EUR/kg. Of other top species, sprat and cod recorded average price increases in May 2018: up by 6% and 3%, respectively.

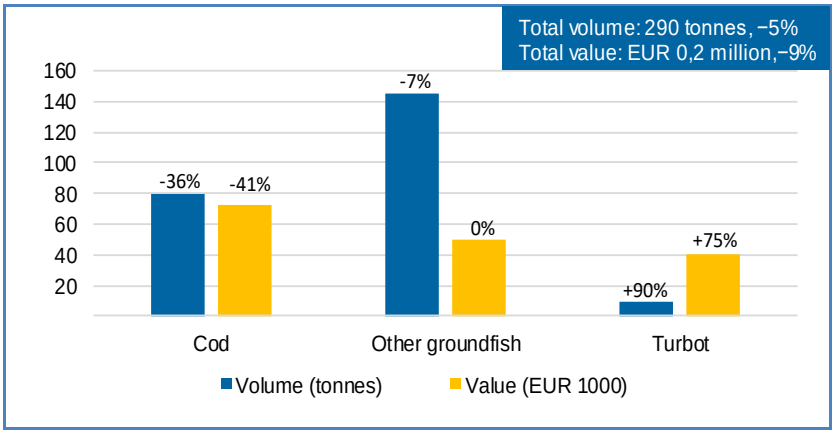
Figure 6. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN LATVIA, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

In **Lithuania** in **January–May 2018**, first-sales value decreased by 8% because of cod (−54%), whereas volume increased 7% because of smelt (+49%), compared with January–May 2017. In **May 2018**, the decreases occurred in first-sales value and volume due to cod. The lower landings of cod did not increase its average price, which decreased by 7% (0,92 EUR/kg). Overall average prices of all top species registered a decrease of 5%.

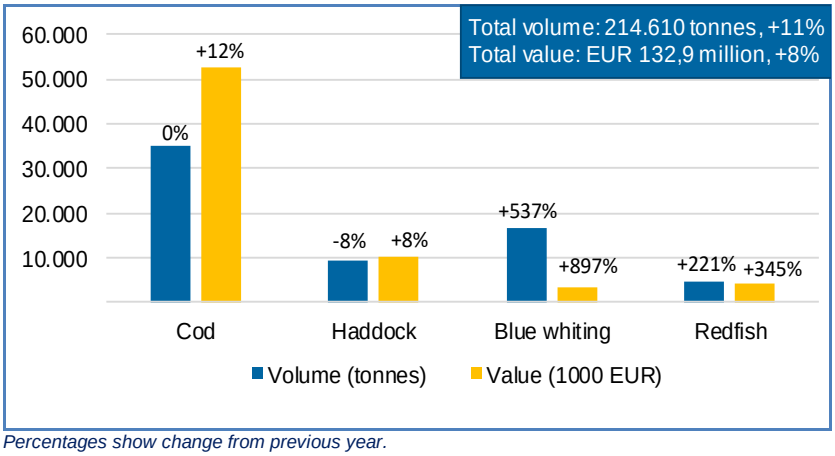
Figure 7. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN LITHUANIA, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

In **Norway** in **January–May 2018**, first-sales value increased by 22% due to cod, blue whiting, herring and mackerel. Volume increased by 35% because of the same species but also due to miscellaneous small pelagic species. In **May 2018**, both first-sales value and volume increased over May 2017. The increase in value was attributable to blue whiting and redfish, and to a lesser extent to other groundfish and herring. In addition, volume increased for ling and redfish. Due to a decrease in volume of landings, average prices increased sharply for Greenland halibut (+53%) and for haddock (+18%).

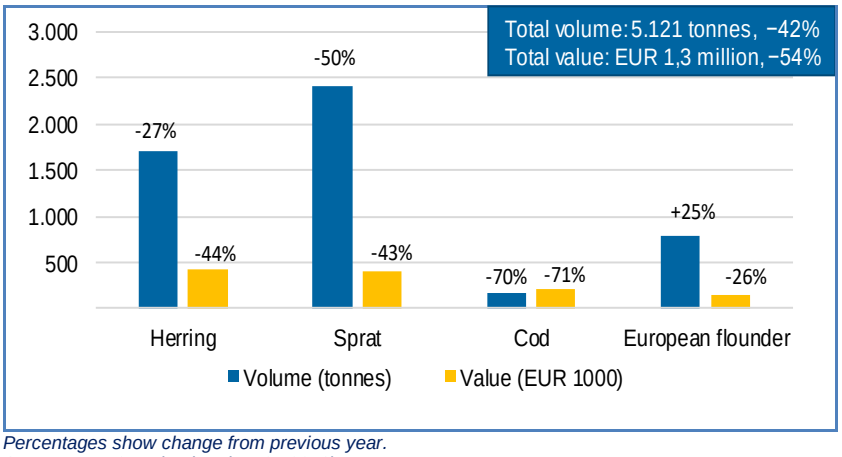
Figure 8. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN NORWAY, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

In **Poland** in **January–May 2018**, lower first-sales value of sprat (−11%) and higher first-sales volume of herring (+42%) were the main causes of the decrease in overall value (−7%) and increase in overall volume (+1%), compared to the same period in 2017. In **May 2018**, the trend was negative for both first-sales value and volume mainly due to herring, sprat, and cod. Average prices of herring were 23% lower (0,25 EUR/kg), whereas sprat recorded an increase of 14% (0,16 EUR/kg).

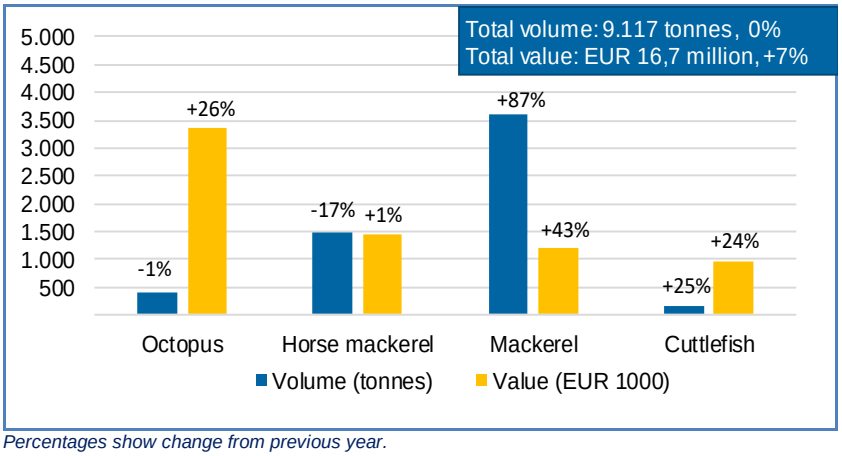
Figure 9. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN POLAND, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

In **Portugal**, overall first-sales value and volume fell in **January–May 2018** by 8% and 10%, respectively. These trends were caused by a decline in octopus value and a slump in volume of horse mackerel. In **May 2018**, first-sales value increased due to octopus, squid and mackerel, whereas volume remained stable. The average price of octopus (rising by 27% to 8,53 EUR/kg) and sardine (up by 68% to 1,35 EUR/kg), contributed to the overall average prices increase of 7% compared to May 2017.

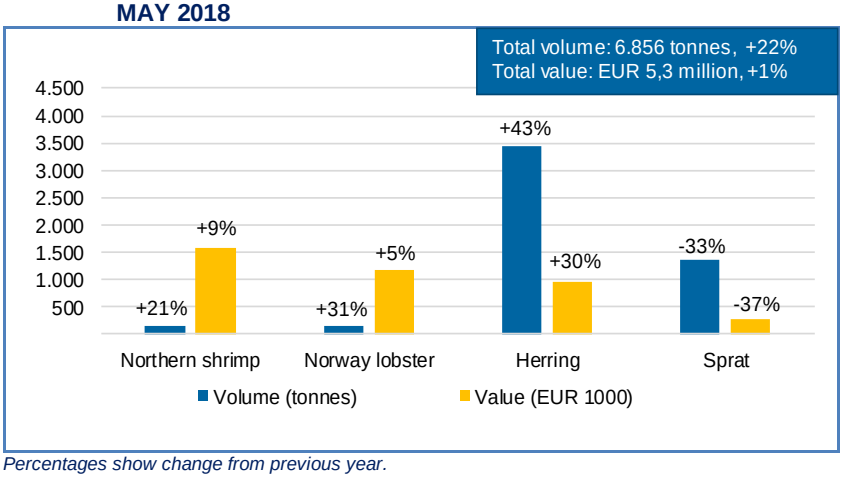
Figure 10. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN PORTUGAL, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

In **Sweden**, first sales grew strongly in both value (+36%) and volume (+97%) during **January–May 2018**. The positive trends were due to herring, which recorded increases of catch by 156%. Other species like Norway lobster and sprat contributed to a lesser extent. In **May 2018**, higher first-sales value of Northern shrimp and herring contributed to the continuation of the overall increases. Average prices of all the top species decreased by 17%. Of those species herring's average price decreased by 10% (0,28 EUR/kg).

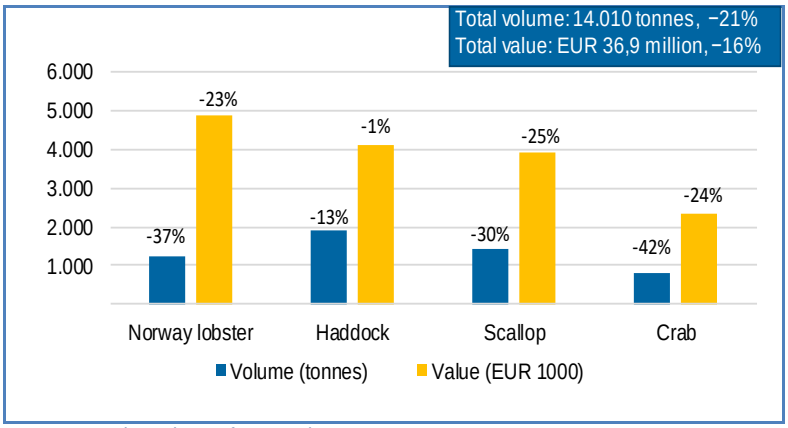
Figure 11. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN SWEDEN, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

In the **UK**, in **January–May 2018**, both first-sales value and volume decreased by 34% mainly due to mackerel, Norway lobster and scallop. In **May 2018**, the same trend occurred, compared with May 2017. Haddock, scallop, and Norway lobster contributed the most to the decreases. Overall average prices of all species increased by 7%. They significantly increased for Norway lobster at 3,96 EUR/kg (+21%) and crab at 2,89 EUR/kg (+32%). Of the species which recorded high decline in prices is saithe (0,88 EUR/kg or down by 26%).

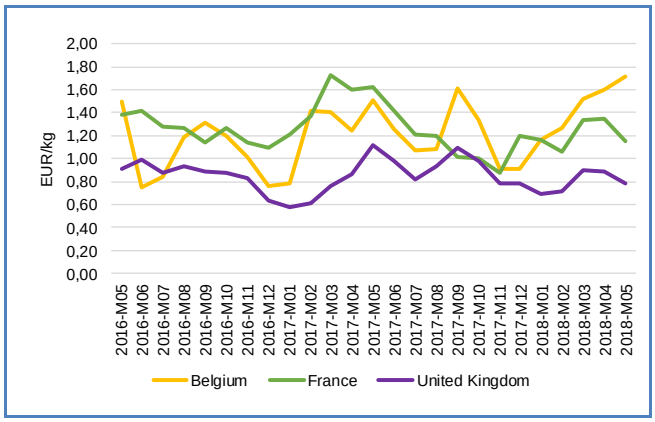
Figure 12. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN THE UK, MAY 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 17.07.2018).

1.4 Comparison of first-sales prices of selected species in selected countries

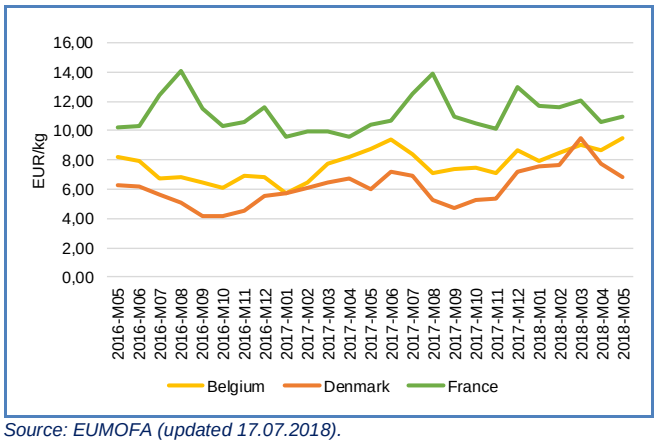
Figure 13. **FIRST-SALES PRICES OF GURNARD IN BELGIUM, FRANCE AND THE UK**



Source: EUMOFA (updated 17.07.2018).

Gurnard is landed in the EU mainly by **Belgium**, **France**, and the **UK**, which together accounted for 78% by volume of total EU landings in 2017. The average first-sales prices in these countries in **May 2018** were 1,72 EUR/kg in Belgium (up by 8% from April 2018 and 14% from May 2017), 1,15 EUR/kg in France (down by 15% from the previous month and by 29% from the same month in 2017), and 0,79 EUR/kg in the UK (down by 11% from March 2018 and by 29% from April 2017). First-sales prices in all three countries have shown no clear direction during the two years ending in May 2018, although there is a slight upward long-run trend in price in Belgium. Prices are affected by supply, dipping in the winter when landings (which are more clearly seasonal) peak and reaching high points in the spring and summer as supply declines.

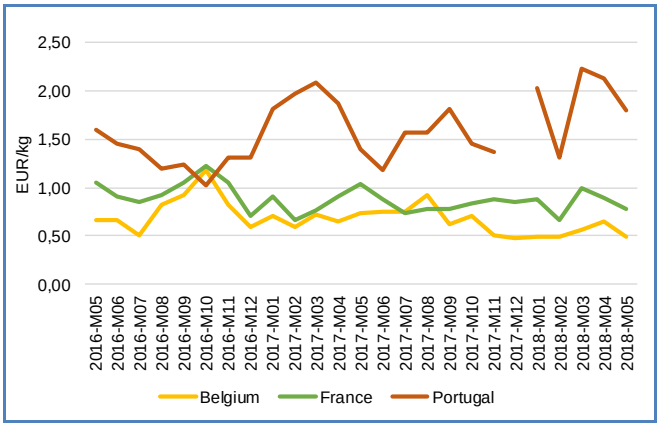
Figure 14. **FIRST-SALES PRICES OF BRILL IN BELGIUM, DENMARK AND FRANCE**



Source: EUMOFA (updated 17.07.2018).

The largest EU harvesters of brill are **Belgium**, **Denmark**, and **France**, which provided a combined 70% of the total volume of brill sold in EU first-sales transactions in 2017. The average first-sales prices for brill in **May 2018** were 9,47 EUR/kg in Belgium (up by 9% from April 2018 and 8% from May 2017), 6,85 EUR/kg in Denmark (down by 12% from the previous month but up by 14% from the same month in 2017), and 11,00 EUR/kg in France (up by 4% from April 2018 and by 6% from May 2017). The average monthly price during the two-year period is 7,67 EUR/kg in Belgium, 6,15 EUR/kg in Denmark, and 11,17 EUR/kg in France. Over the two-year period ending in May 2018, prices in Belgium and Denmark have shown a slight upward trend, while that in France has not. On a month-to-month basis, the price in France appears unconnected to that in the other countries. Landings volume is highly erratic everywhere: in Belgium and Denmark they follow a roughly seasonal pattern, often completely different in direction from changes in landings in France.

Figure 15. **FIRST-SALES PRICES OF POUTING IN BELGIUM, FRANCE AND PORTUGAL**



Source: EUMOFA (updated 17.07.2018).

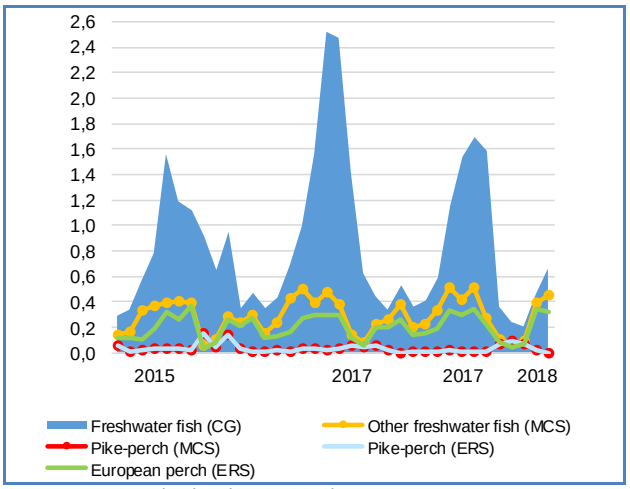
Pouting is landed in significant volumes in **Belgium**, **France**, and **Portugal** among other Member States. The average first-sales prices for pouting in **May 2018** were 0,78 EUR/kg in France (down by 14% from April 2018 and by –14% from May 2017), 1,80 EUR/kg in Portugal (down by –15% from the previous month but up by 28% from May 2017), and 0,49 EUR/kg in Belgium (down by –25% from the previous month and by 33% from a year earlier). First-sales prices in these three markets are seemingly unconnected to one another, moving in different directions – probably reflecting the local nature of pouting markets and the relatively high transport costs for such a low-priced fish (precluding profitable shipments between low- and high-priced markets).

1.5. Commodity group of the month: freshwater fish

The **Freshwater fish** commodity group (CG) ranked 9th in value and 10th in volume among 11 commodity groups in May 2018[2]. First sales of freshwater fish reached EUR 0,65 million and 578 tonnes – a decline of 24% and 5% in value and volume, respectively, from first sales in May 2017. In the past 36 months, the highest value of freshwater fish was registered in November 2016 when it reached more than EUR 2,5 million.

The Freshwater fish commodity group includes six main commercial species (MCS): carp, eel, freshwater catfish, pike, pike-perch and other freshwater fish. European perch belongs to the MCS Other freshwater fish, whereas pike-perch belongs to the MCS Pike-perch. At the species (ERS)[3] level, European perch and pike-perch together made up 58% of total first-sales value of freshwater fish during January–May 2018[4].

Figure 16. **FIRST-SALES VALUE COMPARISON AT CG, MCS, AND ERS LEVEL FOR REPORTING COUNTRIES**



Source: EUMOFA (updated 17.07.2018).

[2] More data on commodity groups can be found in table 1.2 in the Annex.
[3] Species reported at Electronic Reporting System (ERS) level, based on FAO 3-alpha codes.
[4] Ranking of the main commercial species in the Freshwater fish commodity group can be found in table 1.3 in the Annex.

1.6. Focus on European perch

European perch (*Perca fluviatilis*) is a predatory species of perch that belongs to the Percidae family. It is a freshwater species, found originally in the temperate waters of the northern hemisphere (Europe and North America), and has been introduced to Australia, New Zealand, and South Africa[5].

It can be found in some of the brackish waters of the Baltic Sea. As predatory species, juveniles feed on zooplankton, invertebrate fauna, and other perch fry: adults feed on both invertebrates and fish. It spawns between February and July in the northern hemisphere and between August and October in the southern hemisphere.

In Estonia, among the selected countries, European perch has the highest economic importance both for freshwater and Baltic Sea fisheries[6]. The species is fished in both lake Peipsi, and the Baltic Sea coastal waters. Catches are seasonal, occurring mainly in spring and autumn. However, during mild winters, when the water in Pärnu Bay and the Lake Peipsi does not freeze, the fish can be caught year-round. Fishing is done with fyke nets and gillnets – the latter are used in autumn and winter, whereas fyke nets are used in spring and summer.

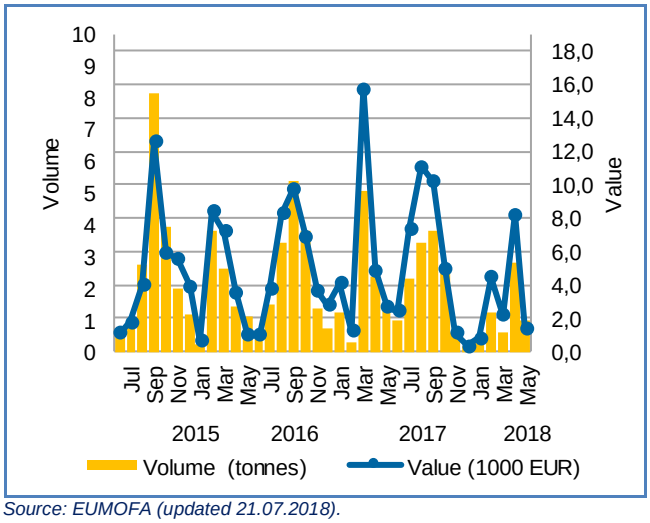
In the UK, it is mainly a sport fish, much praised for its fighting qualities when hooked. In some of the countries where it has been introduced it is considered a pest species[7]. There are no management regulations at the EU level for this species[8].

On the market, the European perch is sold mainly filleted, fresh, and frozen. Most of the catches are processed and exported from Finland, Sweden and Estonia, mainly to France and Switzerland[9].

Selected countries

In **Denmark**, during January−May 2018, first sales of European perch decreased by 40% in value and 42% in volume from to the same period in 2017. A similar trend continued but to a lesser extent if compared with the same period in 2016. In May 2018, first-sales value and volume sharply decreased (−48% in value and −28% in volume) compared to the same month a year earlier. On average, prices in the first five months of 2018 reached 2,90 EUR/kg, representing an increase of 4% compared to January−May 2017, and 27% up from levels in 2016. Most European perch sales were registered at ports in the North Sea. The main port accounting for over 80% of first-sales value is Ringkøbing.

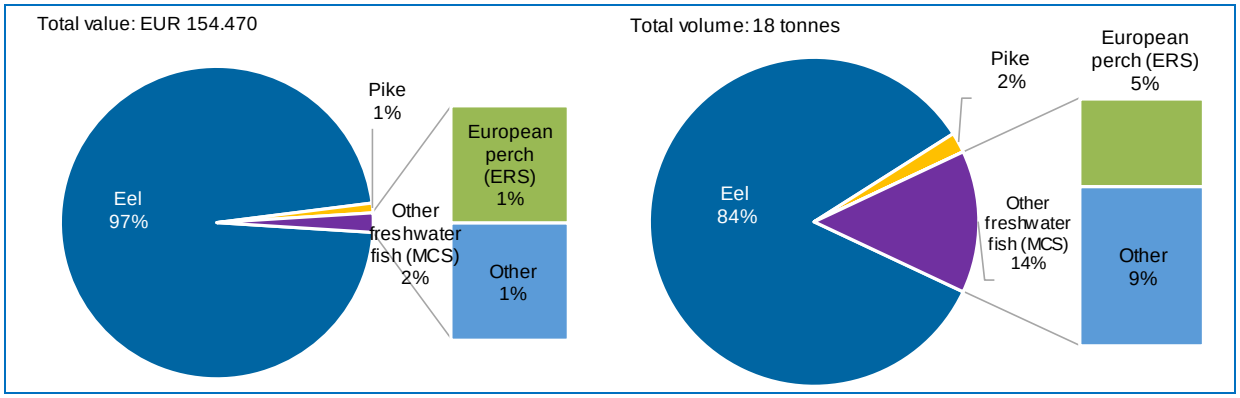
Figure 17. **EUROPEAN PERCH: FIRST SALES IN DENMARK**



Source: EUMOFA (updated 21.07.2018).

[5] http://www.fao.org/fishery/species/2298/en
[6] https://stats.oecd.org/Index.aspx?DataSetCode=FISH_INLAND
[7] http://eol.org/pages/223357/details
[8] https://nas.er.usgs.gov/queries/greatlakes/FactSheet.aspx?SpeciesID=43&Potential=Y&Type=2&HUCNumber=
[9] https://www.tridge.com/intelligences/european-perch

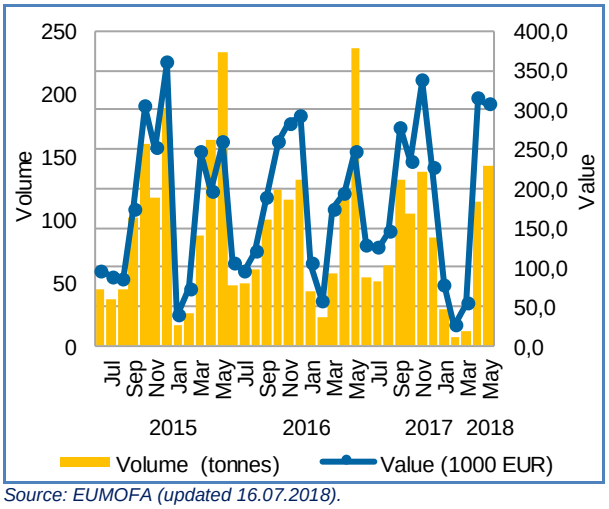
Figure 18. **FIRST-SALES COMPARISON OF FRESHWATER FISH IN DENMARK IN VALUE AND VOLUME, MAY 2018**



Source: EUMOFA (updated 16.07.2018).

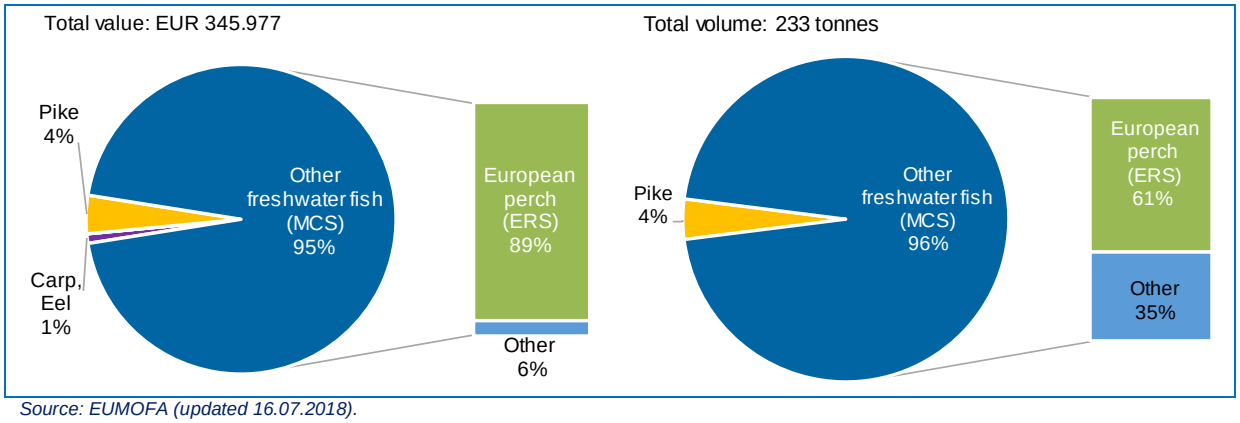
In **Estonia** in January–May 2018, first sales of European perch were stable in value although volume decreased by 36% from the same period in 2017. Value decreased by 4% and volume by 42% compared with the same period in 2016. In May 2018, value increased by 24% to EUR 0,30 million, whereas volume decreased by 39% to 143 tonnes from May 2017. At an overall average level of 2,54 EUR/kg, prices in the first five months of 2018 were significantly higher than in the same period in 2017 (+58%) and 2016 (+65%). The main Estonian ports in first-sales value of European perch are situated in the Baltic Sea. The top three ports are Lindi, Pärnu and Vana-Sauga.

Figure 19. **EUROPEAN PERCH: FIRST SALES IN ESTONIA**



Source: EUMOFA (updated 16.07.2018).

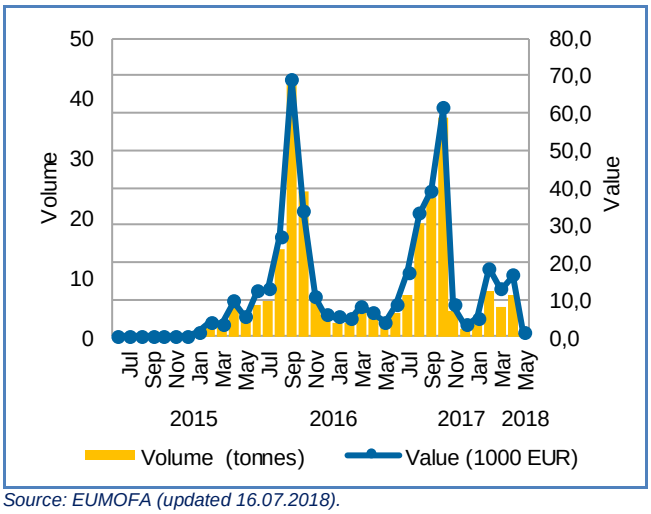
Figure 20. **FIRST-SALES COMPARISON OF FRESHWATER FISH IN ESTONIA IN VALUE AND VOLUME, MAY 2018**



Source: EUMOFA (updated 16.07.2018).

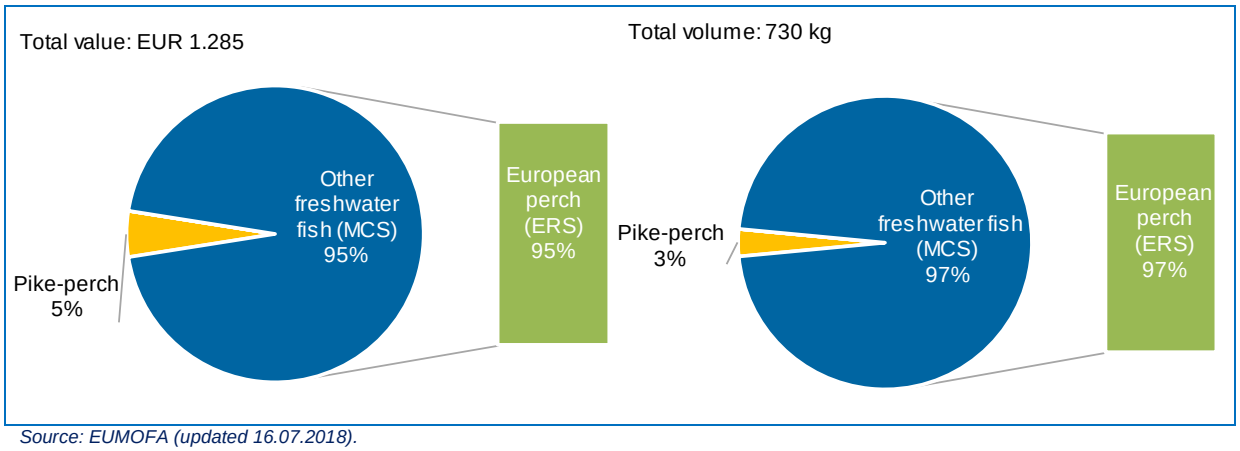
In **Poland** in January–May 2018, first-sales value (EUR 54.000) and volume (23 tonnes) of European perch recorded strong increases by 90% and 46%, respectively, compared to January–May 2017. The highest first-sales value and volume were registered in September 2016, when 43 tonnes were sold for EUR 69.000. In the past three years, the fishery for European perch was cyclic as minor landings were usually recorded during December – May, whereas high season started in June with a peak in August. Nearly all the perch first sales occurred at the port of Świnoujście, situated in the Baltic Sea.

Figure 21. **EUROPEAN PERCH: FIRST SALES IN POLAND**



Source: EUMOFA (updated 16.07.2018).
**No data available for Jun-Dec 2015.*

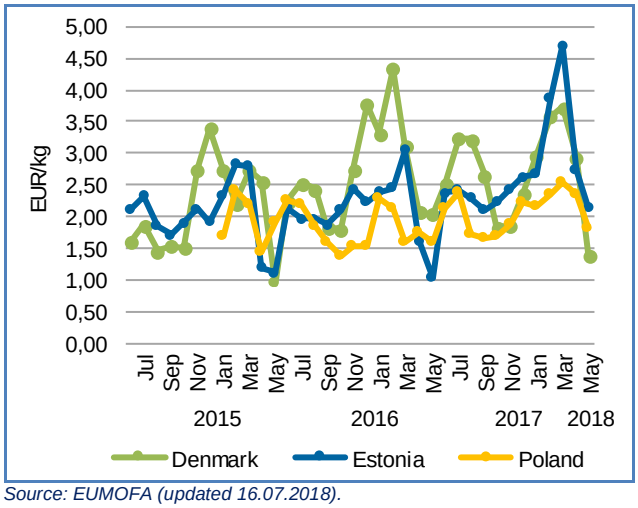
Figure 22. **FIRST-SALES COMPARISON OF FRESHWATER FISH IN POLAND IN VALUE AND VOLUME, MAY 2018**



Source: EUMOFA (updated 16.07.2018).

Price trends

Figure 23. **EUROPEAN PERCH: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 16.07.2018).

We have covered **European perch** in previous *Monthly Highlights*:

First sales: Estonia (10/2016).

Over the past three years, average first-sales prices of European perch generally increased in all the surveyed countries. In general, prices were the highest in Denmark (2,50 EUR/kg), i.e. a third higher than in Poland (1,94 EUR/kg), and 9% more than the average price in Estonia (2,28 EUR/kg).

In **Denmark** in January–May 2018, the average price of European perch at 2,90 EUR/kg was 4% higher than the previous year, and 27% higher than in 2016. In the three-year period, prices reached a peak in February 2017 (4,34 EUR/kg), when catches were among the lowest (282 kg) in the observed period. The highest catch was in September 2015 when 8 tonnes were sold for 1,54 EUR/kg. The lowest average price occurred in May 2016, when the catch of only one tonne was sold for as little as 0,92 EUR/kg.

In **Estonia** in January–May 2018, the average price of European perch (2,54 EUR/kg) was 58% higher than in the same period in 2017, and 65% over 2016. For the past three years, average prices in Estonia were lower than in Denmark but higher than in Poland, and they peaked in February–March of each year. The highest recorded price in a three-year period was in March 2018, when the price reached 4,70 EUR/kg for volume of 11 tonnes. The lowest price was recorded in May 2017 at as little as 1,04 EUR/kg.

In **Poland** in January–May 2018, the average price of European perch was 2,35 EUR/kg, or about 30% higher than in the same period in 2017 and 2016. The highest price was recorded in March 2018, when 5 tonnes were sold at an average price of 2,53 EUR/kg, whereas the lowest price at 1,38 EUR/kg was registered in October 2016. Catches are the highest in September–October.

1.7. Focus on pike-perch

Pike-perch (*Sander lucioperca*) is a freshwater predatory species that belongs to the genus of *Sander* and the Percidae family. It lives in lakes, rivers, reservoirs, and coastal marine waters. The fish is native to eastern Europe, but it is also widespread in western Europe, including France and the UK. It feeds on other fish, insects, and crustaceans. The species is, on average, 50–70 cm long and weighs 2–5 kg. Thanks to its low-fat content, pike-perch meat is highly praised[10]. Pike-perch spawns between April and May, and sometimes from late February until July, over sandy or stony bottoms.

Pike-perch fishing is done mainly with passive gear in the form of fyke nets, used from spring to summer, and gillnets in winter. Active gears, such as Danish seines, are also used in summer. Pike-perch is caught together with European perch, as well as smaller quantities of pike, bream, or roach.

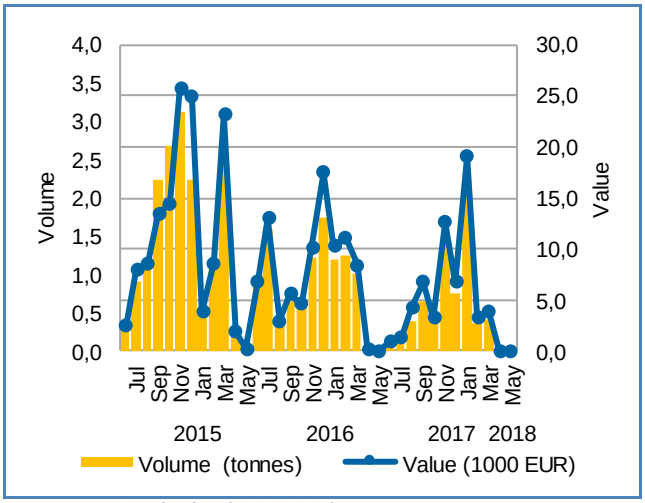
The stocks in Lake Peipsi and the coastal waters of the Baltic Sea are managed slightly differently. In Lake Peipsi, limits are placed on the volume of fish that can be taken as well as on the number of nets that can be used. In the Baltic Sea, the restriction is only on the number of nets and the mesh size, and not on the volume of fish that can be caught. Currently the pike-perch stock is in good condition[11].

Pike-perch is also popular among recreational anglers. On the market, pike-perch is usually sold fresh, however, it can also be found frozen, and as gutted whole fish and fillets with or without skin.

Selected countries

In **Denmark** in January–May 2018, pike-perch first-sales value and volume decreased by 12% and 19%, respectively, compared to the same period in 2017, whereas they declined over 30% compared with 2016. In May 2018, first-sales value and volume significantly decreased about the half, compared to the same month a year earlier. The highest value (EUR 26 thousand) and volume (3 tonnes) were recorded in November 2015. About 40% of pike-perch first sales were registered at ports of Lake Tissø.

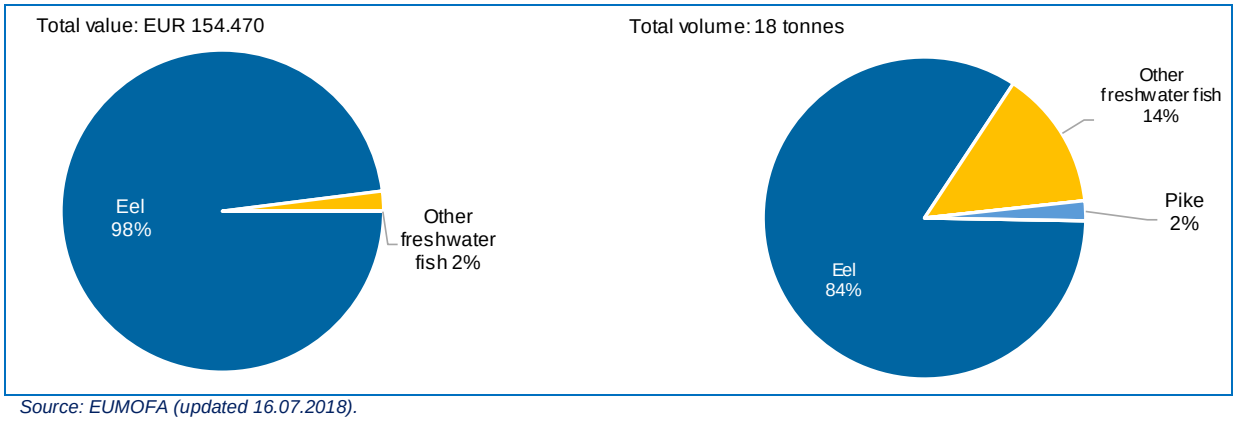
Figure 24. **PIKE-PERCH: FIRST SALES IN DENMARK**



Source: EUMOFA (updated 16.07.2018).
**No catch reported in Apr 2018.*

[10] http://www.fao.org/fishery/culturedspecies/Sander_lucioperca/en
[11] https://www.riigiteataja.ee/en/eli/513062016002/consolide

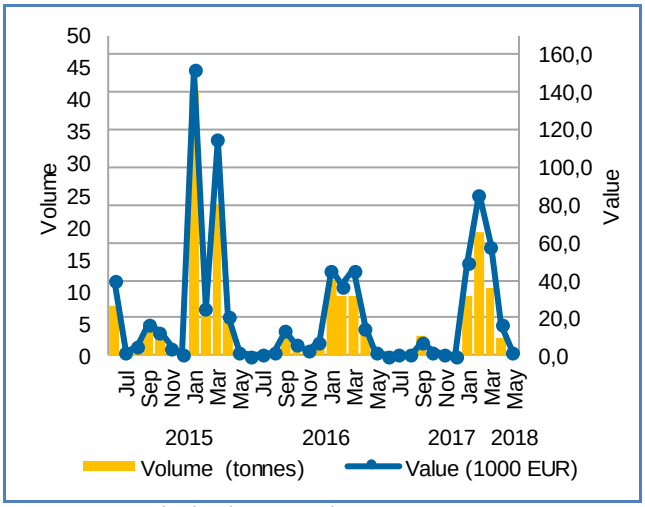
Figure 25. **FIRST-SALES COMPARISON OF FRESHWATER FISH IN DENMARK IN VALUE AND VOLUME, MAY 2018**



Source: EUMOFA (updated 16.07.2018).
**Volume and value for pike-perch were 0% in May 2018.*

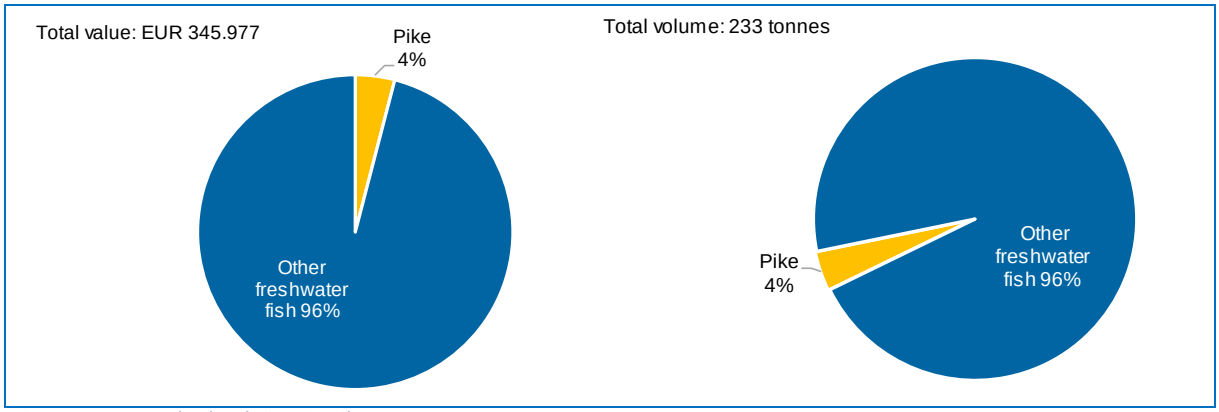
In **Estonia** in January–May 2018, first sales of pike-perch increased in both value and volume over the same period in 2017 (+46% and +24%, respectively), while they declined compared to the observed period in 2016 (−33% and –45%, respectively). In May 2018, first-sales value of EUR 1.558 and volume of 356 kg was higher by 6% and 10%, respectively, compared to May 2017. The month with the highest catch in the 36-month period was January 2016 when 41 tonnes were caught. Over 50% of pike-perch first-sales value was registered at the ports of Pärnu, Raeküla and Lindu.

Figure 26. **PIKE-PERCH: FIRST SALES IN ESTONIA**



Source: EUMOFA (updated 16.07.2018).

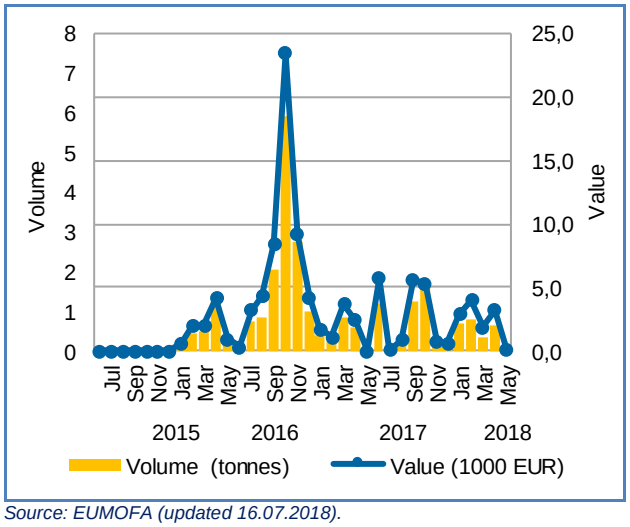
Figure 27. **FIRST-SALES COMPARISON OF FRESHWATER FISH IN ESTONIA IN VALUE AND VOLUME, MAY 2018**



Source: EUMOFA (updated 16.07.2018).
**Volume and value for pike-perch were 0% in May 2018.*

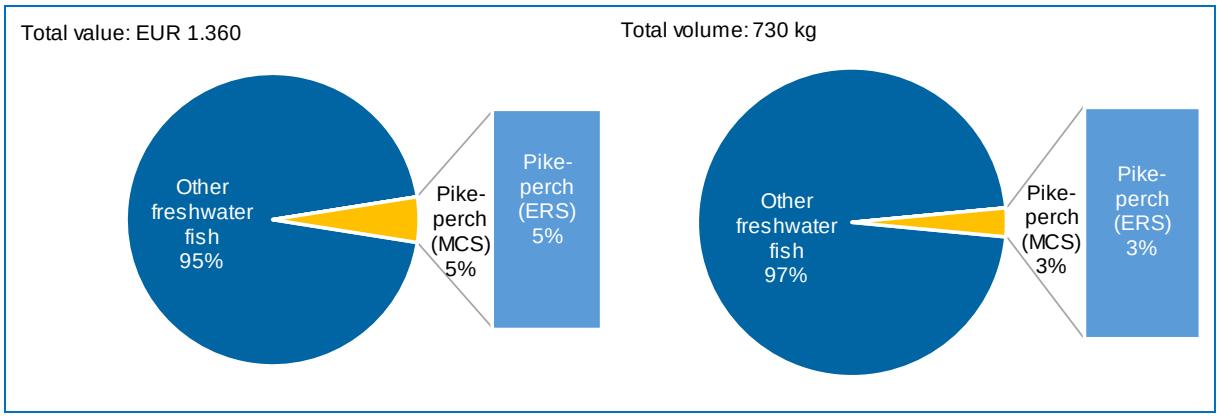
The catch of pike-perch in **Poland** is low when compared with the rest of the surveyed countries. In Poland in January–May 2018, first sales reached EUR 12.000 and 2,5 tonnes increasing by 34% in value and 26% in volume, compared with January–May 2017. From the same period in 2016, value was 24% higher, but volume was 6% lower. In 2018, the main first-sales port is Świnoujście.

Figure 28. **PIKE-PERCH: FIRST SALES IN POLAND**



Source: EUMOFA (updated 16.07.2018).
**No data reported in Jul 2015-Jan 2016.*

Figure 29. **FIRST-SALES COMPARISON OF FRESWATER FISH IN POLAND IN VALUE AND VOLUME, MAY 2018**



Source: EUMOFA (updated 16.07.2018).

Price trends

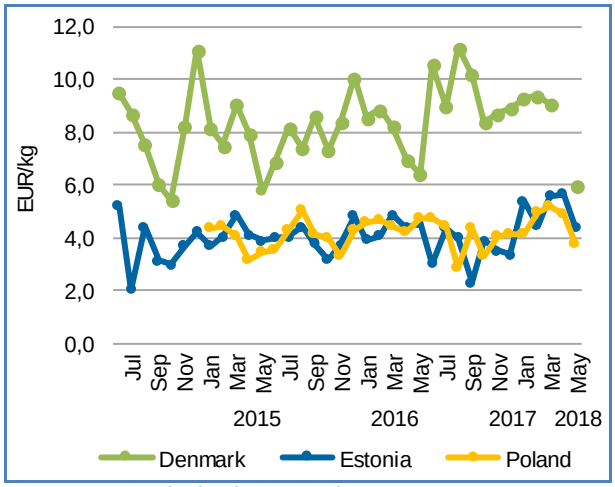
Over the past three years, first-sales average prices of pike-perch generally increased in all surveyed countries, with the highest growth occurring in Poland. Prices were the highest in Denmark (8,33 EUR/kg), 106% higher than in Estonia (4,05 EUR/kg) and 99% over the average price in Poland (4,18 EUR/kg).

In **Denmark** in January–May 2018, the average price of pike-perch (9,26 EUR/kg) was higher than in the same period in 2017 (+8%), and in 2016 (+9%). In May 2018, the average price increased by 8% compared to May 2017. The highest price occurred in August 2017 at 11,20 EUR/kg, with landings of 378 kg. The lowest price was registered in October 2015, when the volume of nearly 3 tonnes of pike-perch was sold for as little as 5,42 EUR/kg.

In **Estonia** in January–May 2018, prices averaged at 5,01 EUR/kg – an increase by 17% and 22% over the same periods in 2017 and 2016, respectively. For the past three years, prices in Estonia were highest in January-April 2018. They peaked in April 2018 at 5,64 EUR/kg, while the lowest first-sales price occurred in July 2017, when the average price was at 2,03 EUR/kg. Average prices fluctuate in correlation with volume of landings, which are the lowest in summer and highest in winter.

The average price in **Poland** in January–May 2018 (4,75 EUR/kg) was 7% higher than in the same period in 2017 and 32% more than in 2016. In the past three years, the peak price at 5,21 EUR/kg occurred in March 2018, when 356 kg were sold. There are no strong fluctuations in pike-perch's average prices due to stable but limited landings in terms of volume. The lowest price in the 3-year period was 2,83 EUR/kg, occurred in August 2017.

Figure 30. **PIKE-PERCH: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 16.07.2018).
**In Poland no data reported in Jun-Dec 2015, and Denmark in Apr 2018.*

We have covered **pike-perch** in previous *Monthly Highlights*:

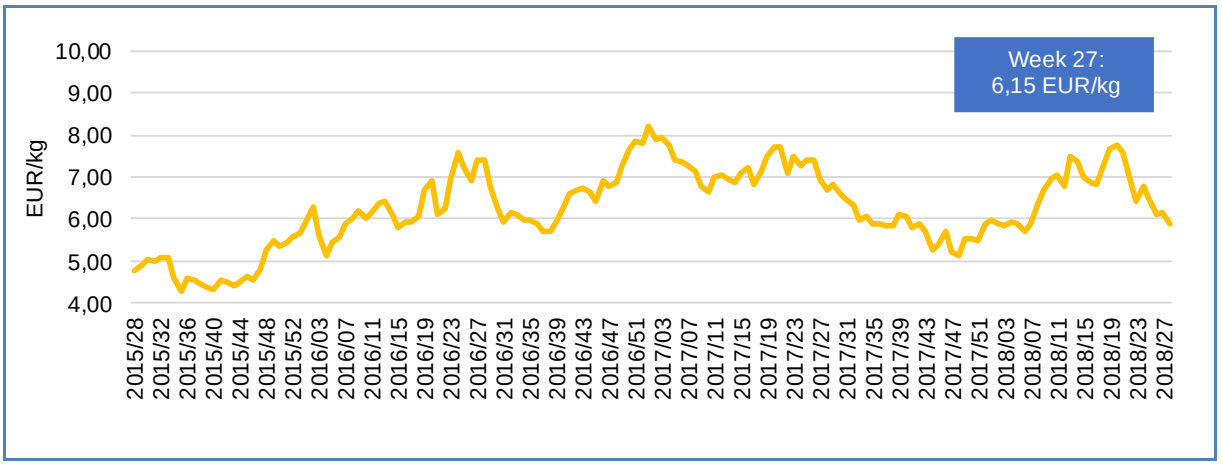
First sales: Estonia (10/2016).

2 Extra-EU imports

Each month, weekly extra-EU import prices (average unit values per week, in EUR per kg) are examined for nine species. Three of them, which are the most relevant in terms of value and volume are examined every month: Alaska pollock from China, Atlantic salmon from Norway, and tropical shrimp (genus Penaeus) from Ecuador. Six other species change every month, and this issue of Monthly Highlights looks at mackerel, caviar substitutes, and bigeye tunas, along with three species products that are examined each month as part of the month's selected commodity group, which this month are catfish, tilapia, and carp.

For fresh whole **Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway,** the average price in the last several weeks remains below price levels prevailing during the same weeks in 2016 and 2017. This is mainly due to increase in sales volumes from Norway in the observed period. The price of 6,15 EUR/kg in **week 27** (first week of July), while up by marginally (0,8%) from week 26, was down by 21% from a recent high of 7,75 EUR/kg in week 20. The average price during weeks 22–27 in 2018 was 6,47 EUR/kg, or 11% lower than the same period in 2017 and 8% lower than in 2016. Volume of 10.210 tonnes in week 27 was 2% lower than in the previous week, and 13% lower than the 2018 weekly average through week 26.

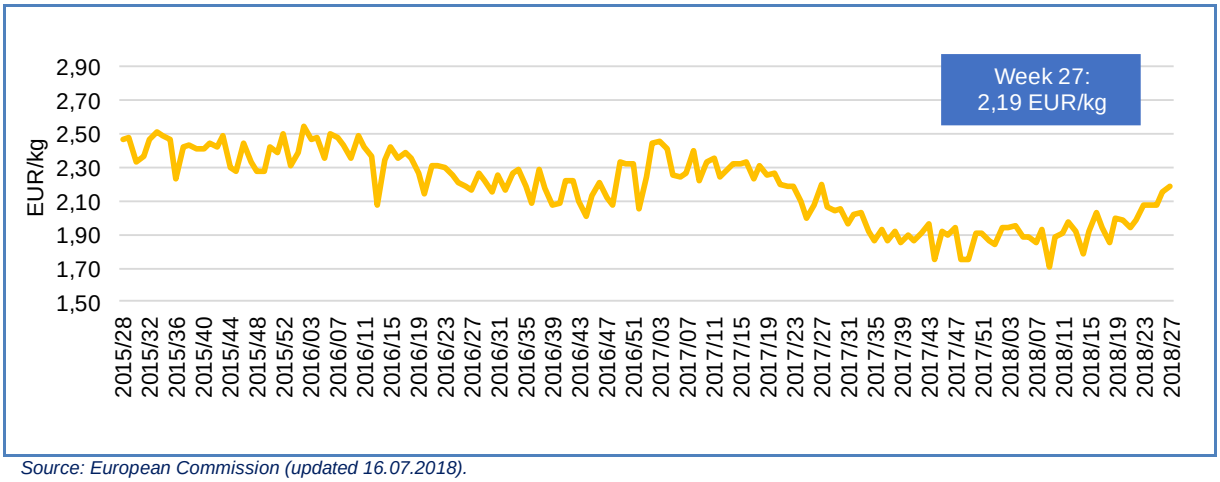
Figure 31. **IMPORT PRICE OF ATLANTIC SALMON, FRESH WHOLE FROM NORWAY**



Source: European Commission (updated 16.07.2018).

The weekly price of frozen fillets of **Alaska pollock** (*Theragra chalcogramma*, CN code 03047500) imported from **China** has continued a recent rise, following a zig-zag pattern of recovery from a long decline through most of 2016–2017. The price in **week 27** of 2,19 EUR/kg was up by 23% from the previous week, and up by 13% over the weekly average thus far in 2018. At the same time, volume has fallen sharply recently to 2.082 tonnes in week 27, about 29% below than the weekly average so far in 2018. However, over the course of the last three years, changes in weekly EU prices of Alaska pollock from China have not materially changed weekly total value, because, usually, proportional changes in volume vastly exceed those in price (price changes tend to slow down rather than reverse total value changes) making week-to-week trends in total value and total volume a very close match. Thus, the total value of these imports also took a tumble in week 27 despite the price rise.

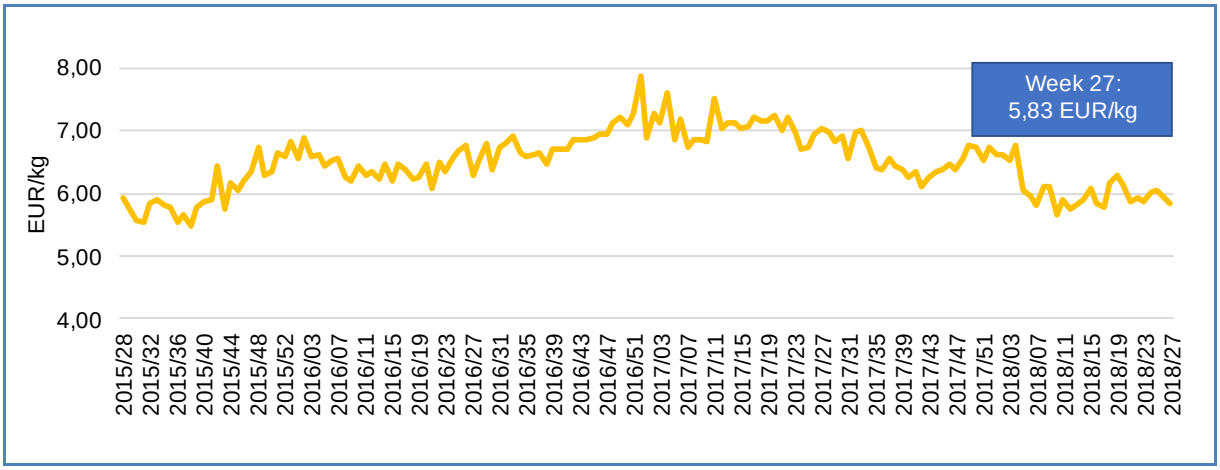
Figure 32. **IMPORT PRICE OF ALASKA POLLOCK, FROZEN FILLETS FROM CHINA**



Source: European Commission (updated 16.07.2018).

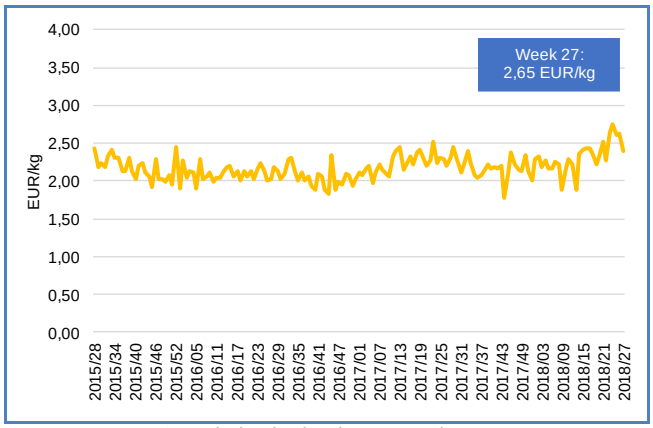
The price of frozen **tropical shrimp** (genus *Penaeus*, CN code 03061792) imported from **Ecuador** in **week 27** was 5,83 EUR/kg, down by 3% from a recent high of 6,03 EUR/kg in week 25 (the third week of June). Prices have slowly declined since the beginning of 2017, not just in Europe but globally, as a supply glut has stifled tropical shrimp price growth worldwide. As a result, consumption is high in many major markets. EU import volume has declined considerably in recent weeks; however, this decline is not significantly different than similar declines during the same periods in the previous two years.

Figure 33. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR**



Source: European Commission (updated 16.07.2018).

Figure 34. **IMPORT PRICE OF CATFISH, FILLETS FROM VIETNAM**

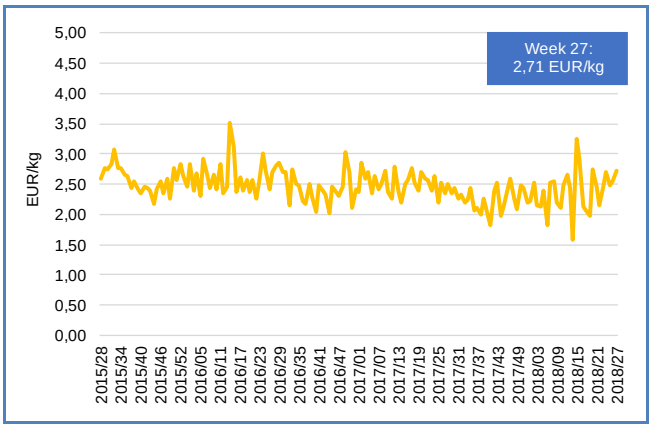


Source: European Commission (updated 16.07.2018).

The average EU import price of frozen fillets of **catfish** (*Pangasius* spp., *Silurus* spp., *Clarias* spp., *Ictalurus* spp., CN code 03046200) from **Vietnam** dropped to 2,65 EUR/kg in **week 27**, down by 9% from the previous week and 13% from a three-year high of 2,75 EUR/kg set just two weeks before that. Nevertheless, prices seem to be on an upward trend since week 44 of 2017, when a three-year low was reached at 1,77 EUR/kg. Import volume has been declining, albeit erratically week-to-week, during the entire three-year period under review. The average weekly volume during weeks 1-27 of 2018 of 1.176 tonnes was 22% lower than the average in the same period in 2017 and 43% below that in 2016.

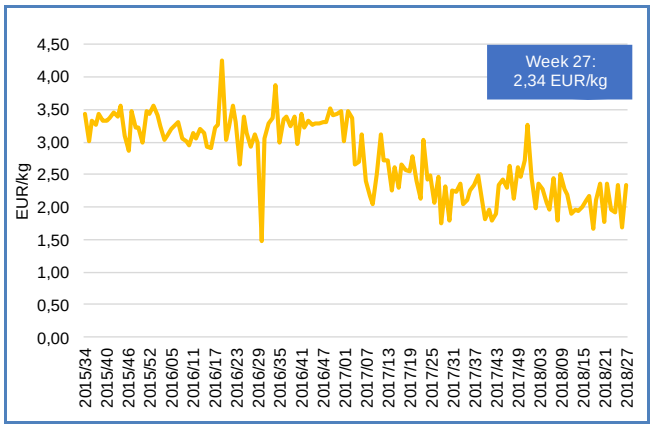
The average EU import price of frozen **tilapia** fillets (*Oreochromis* spp., CN code 03046100) from **China** has been rising, if highly erratically, since October 2017. The price of 2,71 EUR/kg in week 27, 2018 was up by 49% over the price of 1,82 EUR/kg in week 41 of 2017, before the recent general upturn in price began. Prior to that, prices had fallen since early 2017. Weekly volume during the recent upward price trend was generally lower than during most of 2017.

Figure 35. **IMPORT PRICE OF TILAPIA, FROZEN FILLETS FROM CHINA**



Source: European Commission (updated 16.07.2018).

Figure 36. **IMPORT PRICE OF FROZEN CARP FROM MYANMAR**

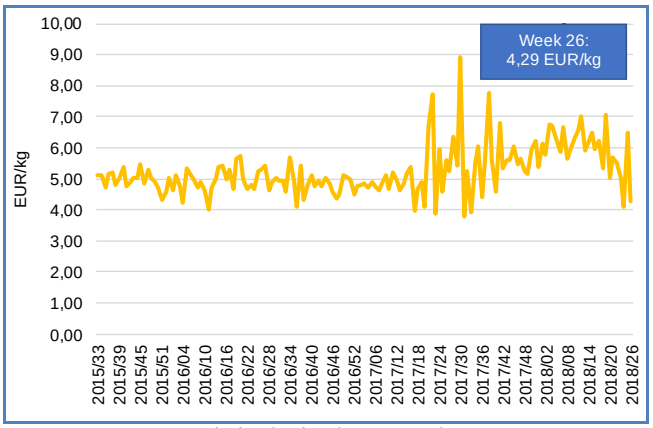


Source: European Commission (updated 16.07.2018).

The price of frozen whole **carp** (including *Cyprinus carpio, Carassius carassius, Ctenopharyngodon idellus, Hypophthalmichthys* spp., *Cirrhinus* spp., *Mylopharyngodon piceus*, CN code 03032500) imported from **Myanmar** has shown no particular trend in the past several weeks, moving up and down between a low of 1,66 EUR/kg in week 18 and a high of 2,37 EUR/kg in week 20, and ending in week 27 at 2,34 EUR/kg. In the longer run, this product's price declined relatively sharply between a stable period in 2015–2016 (during which the price averaged 3,33 EUR/kg) and a lower but also relatively stable period since mid–2017 (during which the price averaged 2,19 EUR/kg). The gap between these two periods of relative price stability corresponds with a dramatic jump in import volume that occurred in the first half of 2017, from a stable weekly average of 27.846 tonnes in 2015–2016, to an (unstable) average of 108.205 tonnes from mid–2017 to the present.

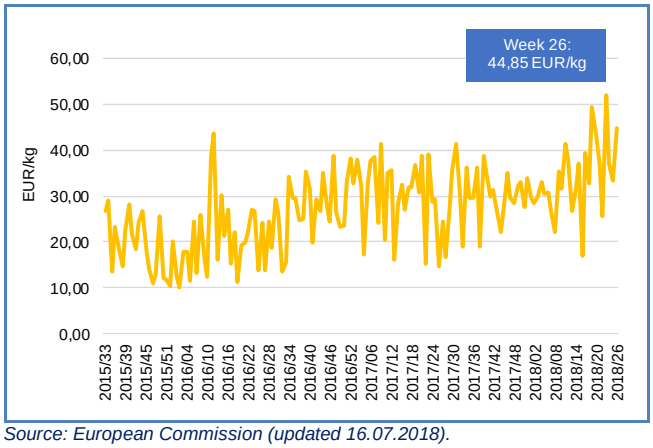
The weekly price of prepared or preserved **mackerel** (*Scomber scombrus* and *S. japonicus*, CN code 16041511) imported from **Morocco** dropped by 34% in week 26 (last week of June) from the price in the previous week, which itself was up by 57% from the week before that. This pattern of price volatility dates from late May 2017, when this product's price first topped 6,00 EUR/kg (reaching 7,73 EUR/kg in week 22 of 2017). Prior to that, this price rarely stepped outside a band between 4,50 EUR/kg and 5,50 EUR/kg. It was shortly before this point (in week 10 of 2017) when weekly volumes, which seldom fell below 100 tonnes and often exceeded 150 tonnes, suddenly dropped, and from that point to the present have averaged 44,7 tonnes. Such sharply diminished volumes have likely contributed to increased price instability.

Figure 37. **IMPORT PRICE OF MACKEREL, PREPARED OR PRESERVED FILLETS FROM MOROCCO**



Source: European Commission (updated 16.07.2018).

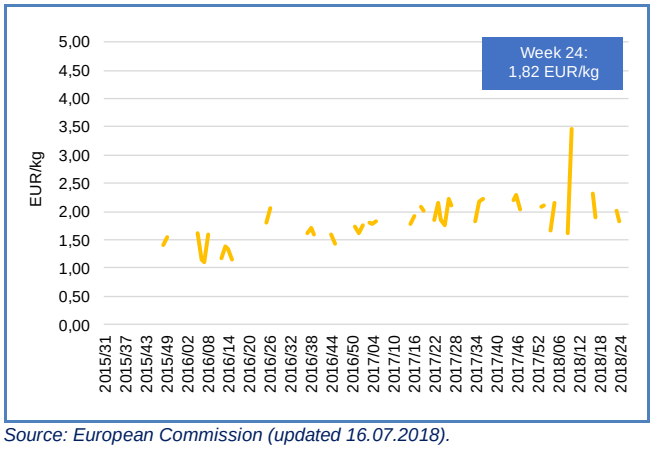
Figure 38. **IMPORT PRICE OF CAVIER SUBSTITUTES FROM THE US**



Source: European Commission (updated 16.07.2018).

The weekly price of **caviar substitutes** (e.g., prepared or preserved roe of lumpfish or salmon, CN code 16043200) imported from the **US** was 44,85 EUR/kg in week 26, up by 34% from the previous week, part of a general upward trend occurring in 2018, which itself is associated with a general declining trend in weekly volumes. Connections between price and volume trends for this product, however, require more product-specific information than is collected in published trade data, because of the wide variety of sub-products and associated price levels within this product category.

Figure 39. **IMPORT PRICE OF FROZEN BIGEYE FROM EL SALVADOR**



Source: European Commission (updated 16.07.2018).

The EU import price of frozen whole **bigeye tuna**, excluding fish imported for industrial manufacture such as canning (*Thunnus obesus*, CN code 03034490) imported from **El Salvador** was 1,82 EUR/kg in week 24 (the latest available), down by 10% from the previous week, and down by 15% from the weekly average since week 13 of 2017. Volume in week 24 (the second week of June) of 135 tonnes was up by 33% over the weekly average during the same period. EU trade in this product is sporadic, and it is used for processing by EU canneries.

3 Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In April 2018, Italy was the only country where consumption of fresh fisheries and aquaculture products increased in both volume and value (+8% and +10%, respectively) compared with April 2017. In Denmark, volume increased by 1% and value decreased by 13%. In the rest of the Member States surveyed, consumption decreased in both volume and value. The largest drop in volume occurred in Hungary (−48%), while the largest drop in value was registered in Sweden (−39%).

Compared with March 2018, a similar downward trend can be observed. Denmark was the only country registering an increase (+16% and +4%, respectively). In Italy, volume remained almost stable while value declined by 5%. In all the other Member States surveyed, volume and value decreased. The greatest decreases were registered in Hungary and Poland.

Table 3. **APRIL OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)**

Country	Per capita consumption 2015* (live weight equivalent) kg/capita/year	April 2016		April 2017		March 2018		April 2018		Change from April 2017 to April 2018	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	22,9	870	12,50	702	11,88	612	9,96	708	10,33	1%	13%
Germany	13,4	5.950	86,12	6.448	97,11	7.590	115,85	5.033	76,88	22%	21%
France	33,9	18.453	206,73	17.261	207,25	19.927	217,41	15.465	183,37	10%	12%
Hungary	4,8	267	1,22	416	1,94	458	2,45	215	1,38	48%	29%
Ireland	22,1	1.001	13,80	1.061	14,90	1.283	18,51	982	14,09	7%	5%
Italy	28,4	26.020	221,83	26.962	234,28	29.048	270,94	29.046	257,16	8%	10%
Netherlands	22,2	2.122	32,13	2.167	35,67	2.761	44,50	1.931	32,54	11%	9%
Poland	13,6	4.449	24,87	4.231	24,50	5.036	30,44	3.098	18,62	27%	24%
Portugal	55,9	4.708	28,40	4.351	28,88	4.782	31,43	3.710	24,53	15%	15%
Spain	45,2	60.077	417,96	51.099	381,08	53.238	405,95	49.578	371,16	3%	3%
Sweden	26,9	848	11,59	992	14,76	1.001	12,43	670	9,02	32%	39%
UK	24,3	23.894	258,36	24.670	265,42	30.122	316,86	23.891	257,25	3%	3%

Source: EUMOFA, based on Europanel (updated 09.07.2018).
**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/20178/108446/The+EU+fish+market+2017.pdf

Generally, consumption trend of fisheries and aquaculture products in the month of April in the past three years declined in both volume and value in most of the Member States analysed. However, in Hungary, Ireland and the Netherlands volume decreased, while value increased. Only in Italy both volume and value grew.

In the month of April for the past three years, household consumption of fresh fish products has been above the annual average in both volume and value in Denmark (+15% and +18%, respectively) and Sweden (+3% and +9%). In Germany, France, Italy and Spain, household consumption in April was above the average in value, however, consumed volume remained below the average except for Germany, where it was at the annual average level. In the rest of the Member States surveyed, both volume and value were below the annual average.

The most recent consumption data available on EUMOFA for **May 2017** can be accessed **here**.

3.2. Fresh gilthead seabream

Habitat: a sedentary species, inhabiting seagrass beds and sandy bottoms to depths of about 30 m[12].
Catch area: Mediterranean and Black seas, Northeastern Atlantic.
Main producing countries in Europe: Greece, Italy, Spain.
Production method: caught and farmed.
Main consumers in the EU: Italy, Greece, Spain.
Presentation: whole.
Preservation: fresh, chilled.
Ways of preparation: grilled, baked.

3.2.1 General overview of household consumption in France, Italy, Portugal and Spain

France, Italy, Portugal and Spain are among the countries with the highest per capita consumption of fish and seafood products in the EU. In 2015, Portugal registered the highest per capita consumption in the EU, 55,9 kg, more than two times the EU average of 25,1 kg. Spain registered per capita consumption of 45,2 kg, 19% lower than Portugal and 80% higher than the EU average. In France, the per capita consumption was 33,9 kg, 25% lower than in Spain, but 19% higher than in Italy, where the per capita consumption was 28,4 kg, an increase of 2% compared with a year ago. See more on EU per capita consumption in Table 3.

During the period January 2015–April 2018, retail prices of fresh gilthead seabream fluctuated the most in France, where also the highest prices were registered. Volume saw considerable monthly variations in Italy and Spain, but it registered bigger sales compared with France and Portugal, where volumes sold were five times lower, but remained relatively stable.

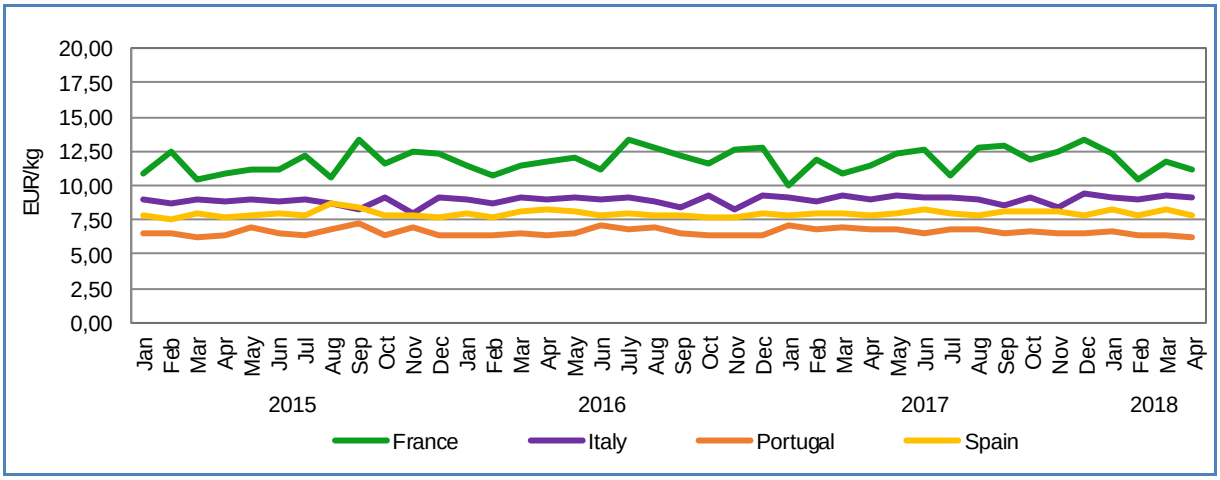
We have covered **Gilthead seabream** in previous *Monthly Highlights*:

Topic of the month: Seabass and seabream in Greece (9/2017), Gilthead seabream in Italy (3/2014).

Consumption: Greece (6/2016, 9/2015, 2/2015), Italy (6/2016, 9/2015, 2/2015), Portugal (6/2016, 2/2015), Spain (6/2016, 9/2015, 2/2015).

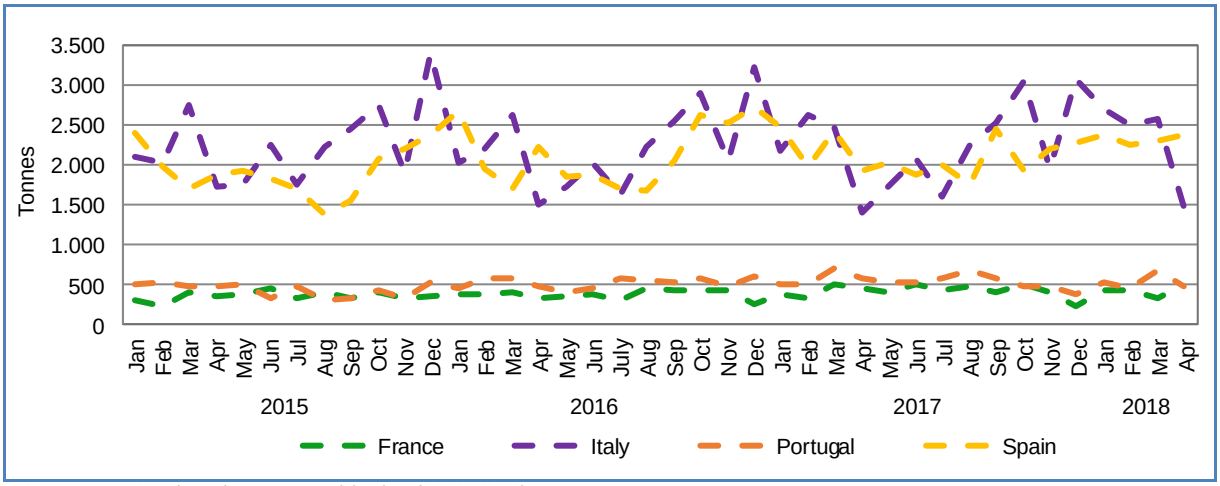
[12] https://www.fishbase.de/Summary/SpeciesSummary.php?ID=1164&AT=gilthead+seabream

Figure 40. **RETAIL PRICES OF FRESH GILTHEAD SEABREAM**



Source: EUMOFA, based on Europanel (updated 09.07.2018).

Figure 41. **VOLUME SOLD OF FRESH GILTHEAD SEABREAM**

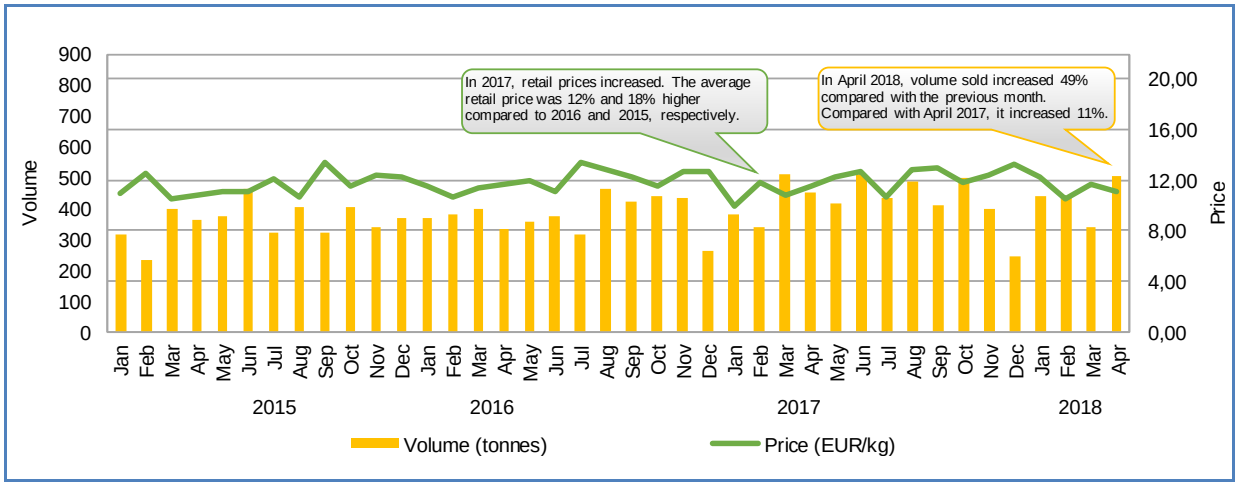


Source: EUMOFA based on Europanel (updated 09.07.2018).

3.2.2 Consumption trend in France

Long-term trend, January 2015–April 2018: increasing in both volume and price.
Yearly average price: 11,62 EUR/kg (2015), 11,98 EUR/kg (2016), 11,93 EUR/kg (2017).
Total yearly consumption: 4.289 tonnes (2015), 4.540 tonnes (2016), 5.080 tonnes (2017).
Short-term trend, January–April 2018: increasing in volume and slightly in price.
Average price: 11,39 EUR/kg.
Total consumption, January–April 2018: 1.716 tonnes.

Figure 42. **RETAIL PRICE AND VOLUME SOLD OF FRESH GILTHEAD SEABREAM IN FRANCE**

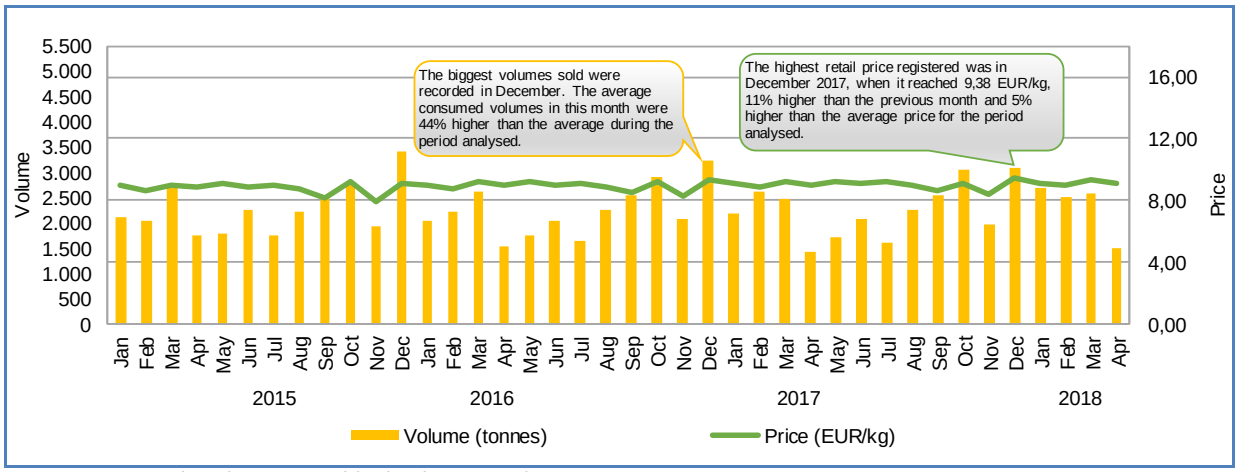


Source: EUMOFA, based on Europanel (updated 09.07.2018).

3.2.3 Consumption trend in Italy

Long-term trend, January 2015–April 2018: increasing in volume and slightly in price.
Yearly average price: 8,79 EUR/kg (2015), 8,93 EUR/kg (2016), 9,01 EUR/kg (2017).
Total yearly consumption: 27.140 tonnes (2015), 26.758 tonnes (2016), 26.945 tonnes (2017).
Short-term trend, January–April 2018: increasing slightly in both volume and price.
Average price: 9,13 EUR/kg.
Total consumption, January–April 2018: 9.286 tonnes.

Figure 43. **RETAIL PRICE AND VOLUME SOLD OF FRESH GILTHEAD SEABREAM IN ITALY**

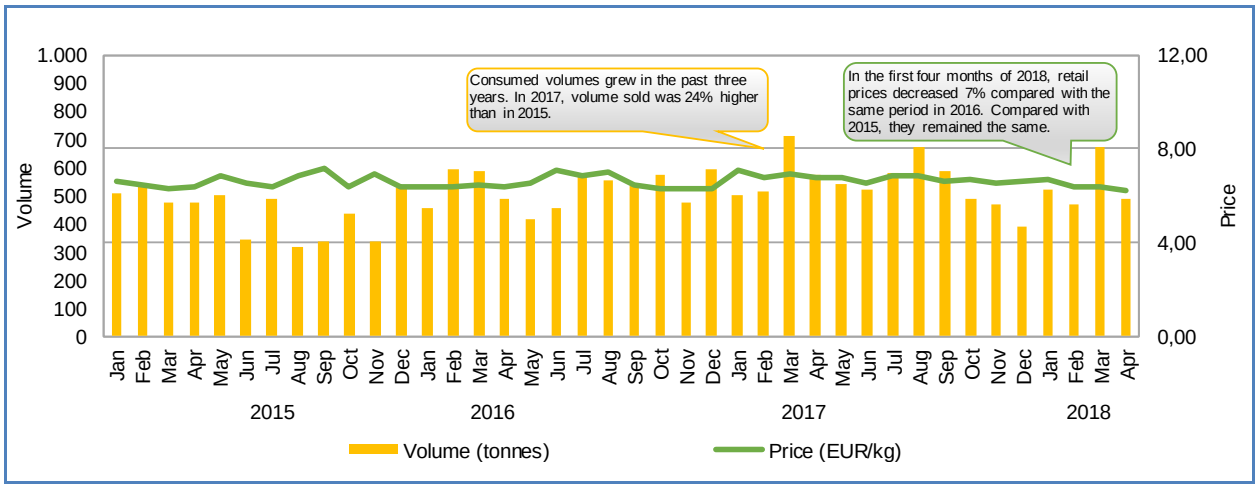


Source: EUMOFA, based on Europanel (updated 09.07.2018).

3.2.4 Consumption trend in Portugal

Long-term trend, January 2015–April 2018: increasing in volume and slightly in price.
Yearly average price: 6,58 EUR/kg (2015), 6,53 EUR/kg (2016), 6,74 EUR/kg (2017).
Total yearly consumption: 5.283 tonnes (2015), 6.298 tonnes (2016), 6.551 tonnes (2017).
Short-term trend, January–April 2018: increasing slightly in volume and remained stable in price.
Average price: 6,41 EUR/kg.
Total consumption, January–April 2018: 2.145 tonnes.

Figure 44. **RETAIL PRICE AND VOLUME SOLD OF FRESH GILTHEAD SEABREAM IN PORTUGAL**

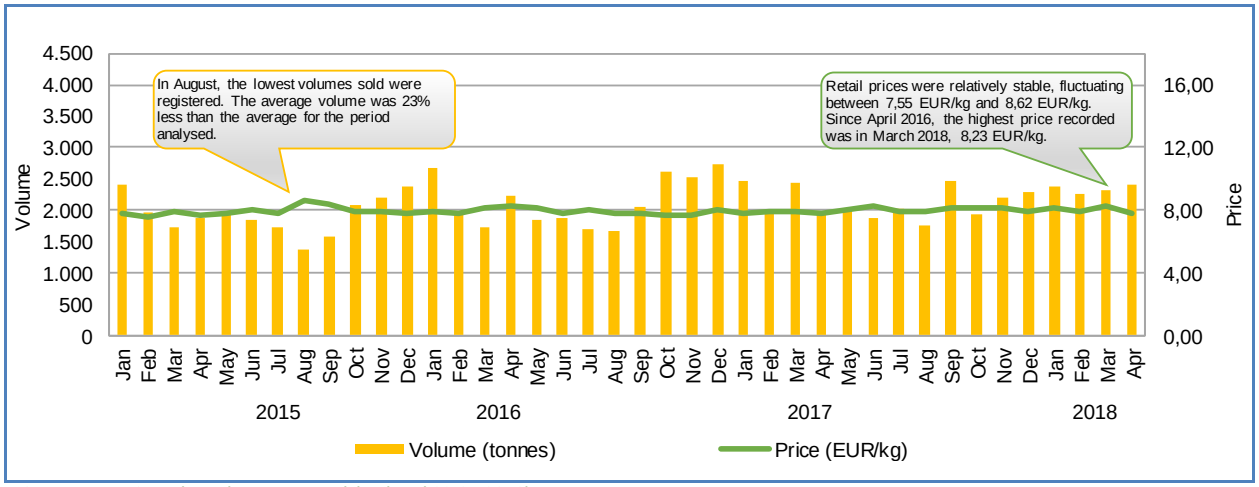


Source: EUMOFA, based on Europanel (updated 09.07.2018).

3.2.5 Consumption trend in Spain

Long-term trend, January 2015–April 2018: increasing in volume and slightly in price.
Yearly average price: 7,91 EUR/kg (2015), 7,90 EUR/kg (2016), 7,95 EUR/kg (2017).
Total yearly consumption: 23.036 tonnes (2015), 25.626 tonnes (2016), 25.356 tonnes (2017).
Short-term trend, January–April 2018: increasing in volume and slightly in price.
Average price: 8,03 EUR/kg.
Total consumption, January–April 2018: 9.342 tonnes.

Figure 45. **RETAIL PRICE AND VOLUME SOLD OF FRESH GILTHEAD SEABREAM IN SPAIN**



Source: EUMOFA, based on Europanel (updated 09.07.2018).

4 Case study – Atlantic mackerel in the EU

Atlantic Mackerel (*Scomber scombrus*) is a fast-swimming schooling pelagic fish easily recognisable with its round torpedo-shaped body. Mackerel can reach the age of 25 years and a size of 70 cm and 3,5 kg but are seldom larger than 50 cm and 1 kg. It is a typical plankton feeder, swimming with the mouth open and filtrating zooplankton through the gill rakers. It also uses particulate feeding on fish larvae and small fish. Mackerel prefer waters warmer than 6°C. They spawn for the first time when they reach about 30 cm in length. Mackerel do not have a swim bladder and need to constantly swim to avoid sinking.

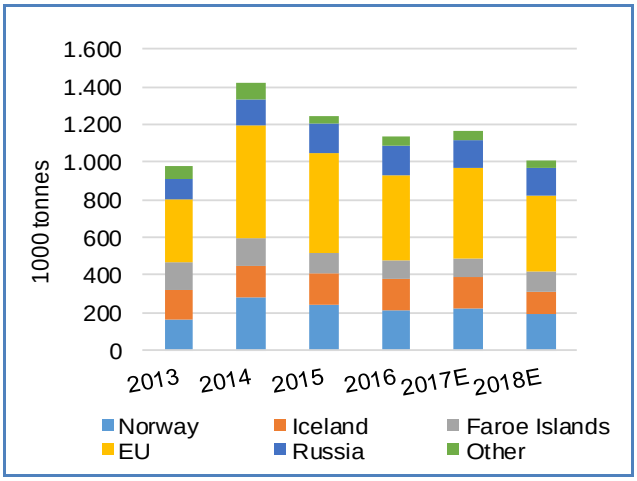
Geographic distribution includes the area from North-Western Africa and north to the Barents Sea including Svalbard, and westward to Iceland and Greenland.

Mackerel migrates into the North Sea and the Norwegian Sea after spawning to feed. There has been a historical expansion of mackerel in the last several years, and mackerel is found west to Greenland, north to the Barents Sea and up to Svalbard, and east into Skagerrak in the summer. Mackerel stay in these areas throughout the autumn before migrating towards the spawning areas early in the winter.

Total landings of mackerel have been higher than recommended by ICES in recent years. The main reason is substantial disagreement between the countries participating in the fishery on how to share the quotas. In 2015, there was a management agreement between the EU, Norway and the Faroe Islands. Iceland did not agree with the other countries, and together with Russia and Greenland have set their own unilateral mackerel quota outside the management arrangement in recent years.

4.1. Global catch of Atlantic mackerel

Figure 46. **GLOBAL CATCH OF ATLANTIC MACKEREL**



Source: Pelagic Fish Forum.

In 2014, global Atlantic mackerel catches exceeded 1,4 million tonnes, which represent a peak in landings for the past 50 years[13].

In 2015 and 2016, catches decreased but increased again in 2017 to above 1,16 million tonnes. Preliminary catch and quota figures for 2018 show that mackerel harvests should be at a lower level than in 2017, but above 1 million tonnes. The main catching nations are Norway, Iceland, the Faroe Islands, the EU and Russia. In 2016 and 2017, the EU harvest constituted 41% of total catches[14].

[13] FAO.
[14] Pelagic Fish Forum.

4.2. EU first sale of Atlantic mackerel

In 2016, mackerel landed in the EU reached 297.000 tonnes worth EUR 386 million. This was mostly driven by landings from the largest quota holder, the UK, but also by landings in Ireland, the Netherlands and Spain. In total, volumes decreased by 19% and value decreased by 6% compared to 2015.

Table 4. **LANDINGS OF ATLANTIC MACKEREL BY EU MEMBER STATE (value in million EUR, volume in 1000 tonnes)**

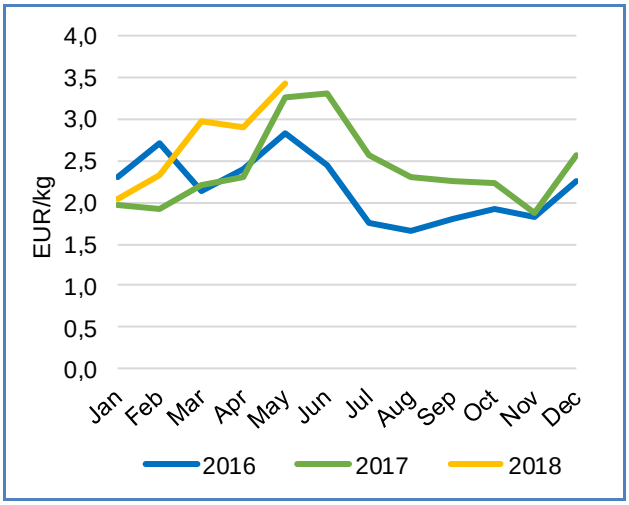
Catching nation	2011		2012		2013		2014		2015		2016	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume
UK	162	118	99	89	104	99	150	156	92	104	119	114
Ireland	45	43	40	55	56	51	61	83	44	76	53	71
Netherlands	93	68	56	39	20	21	58	47	103	114	47	53
Spain	21	18	27	23	17	18	30	37	23	34	29	30
Denmark	47	28	26	25	17	14	19	21	19	22	19	17
France	17	13	13	11	13	10	14	10	13	11	14	10
Other	21	16	12	9	11	7	11	8	12	10	5	2
Total	407	305	273	251	238	220	343	361	304	369	286	297

Source: Eurostat.

In the UK, Atlantic mackerel first-sales average price increased by 18% in 2016 compared to 2015. The average price in 2017 was 0,99 EUR/kg, a 3% decrease from 2016. During the first five months of 2018 average first-sale price in the UK increased by 42% over the same period in 2017.

This increasing price trend was also observed in other supplying nations such as Norway[15]. This must be seen in the light of declining quotas and good market conditions for the Atlantic mackerel in general.

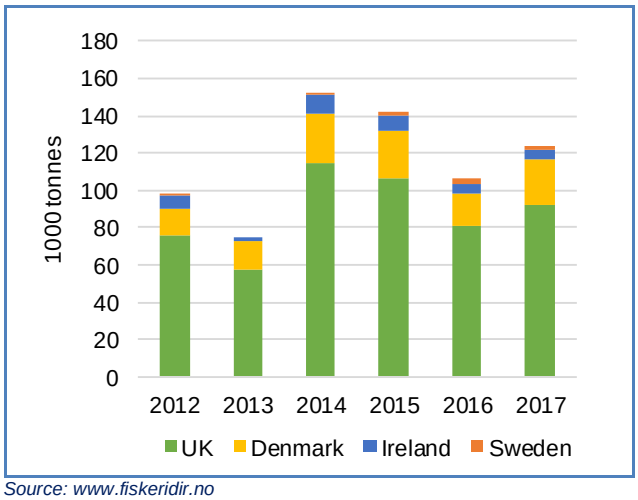
Figure 47. **FIRST SALE PRICE OF ATLANTIC MACKEREL IN THE UK**



Source: Comext.

[15] NSSL.

Figure 48. **LANDINGS OF ATLANTIC MACKEREL IN NORWAY BY THE EU FLEET**



Source: www.fiskeridir.no

The EU fleet has a long tradition of landing mackerel in Norway. In 2014, EU mackerel landings in Norway exceeded 152.000 tonnes, a level which was not seen since 2000. Landed volumes have varied strongly throughout the years and reached their lowest level in 2006 with 26.000 tonnes. In 2017, EU vessels landed 124.000 tonnes of Atlantic mackerel in Norwegian harbours. The UK is by far the most important catching nation landing fisheries products in Norway, constituting around 75% of the mackerel landings. The second largest, Denmark, constitutes between 15% and 20% of the landings from the EU fleet in Norway.

4.3. Trade of Atlantic mackerel

Extra-EU Import

Mackerel is one of the most important commercial species in the small pelagics commodity group in the EU. In 2017, extra-EU imports of mackerel reached 123.250 tonnes and EUR 187,5 million. This was a 16% increase in volume and a 3% increase in value compared to 2016.

The Faroe Islands (EUR 43,6 million), Norway (EUR 36,5 million), Iceland (EUR 33,9 million) and Greenland (EUR 24 million) were the main supplying countries to the EU market, representing 74% of the total extra-EU import value.

Table 5. **EXTRA-EU IMPORT OF ATLANTIC MACKEREL BY TOP COUNTRY (value in 1000 EUR, volume in tonnes)**

Catching nation	2013		2014		2015		2016		2017	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Faroe Islands	35.976	29.025	33.312	32.050	29.588	25.200	41.841	33.328	43.622	33.471
Norway	33.164	22.733	35.707	24.744	35.151	25.591	30.237	20.160	36.527	24.749
Iceland	9.846	7.501	9.587	6.674	17.827	14.021	26.647	19.372	33.958	20.945
Greenland	2.850	2.582	7.904	6.329	12.465	11.003	11.340	9.864	24.172	20.341
Morocco	51.087	11.975	45.716	11.505	49.613	13.853	51.229	14.191	20.703	6.769
China	6.459	4.315	9.895	5.710	6.357	3.644	7.534	4.790	9.800	5.225
Other	10.177	3.349	14.788	5.228	9.926	2.682	13.345	4.693	18.670	11.752
Total	149.558	81.480	156.909	92.239	160.927	95.993	182.172	106.398	187.451	123.250

Source: Comext.

In 2017, 78% of the import value was frozen products. The frozen category consists mainly of round frozen mackerel from the Faroe Islands, Norway, Iceland and Greenland. In 2017, the frozen category increased 28% from 2016 to EUR 147 million while the prepared/preserved category decreased 44% to nearly 36 million.

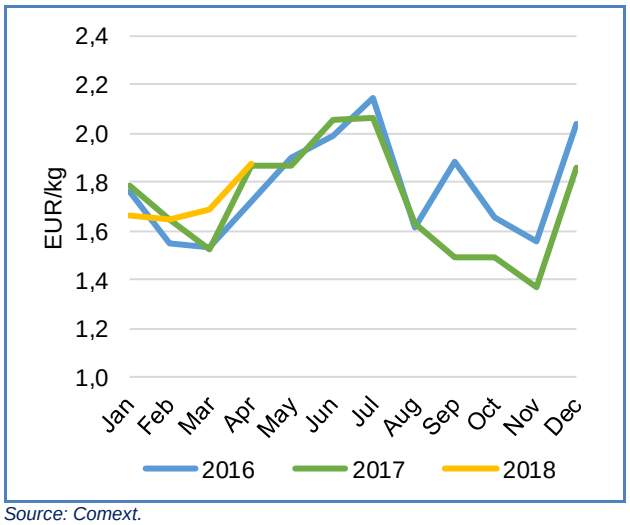
Table 6. **EXTRA-EU IMPORT OF ATLANTIC MACKEREL BY PRESERVATION STATE (value in 1000 EUR)**

Preservation state	2013	2014	2015	2016	2017	Change 2016/2017
Frozen	84.775	91.389	98.403	115.215	146.948	28%
Prepared-Preserved	62.646	63.093	60.194	64.424	35.934	-44%
Fresh	2.123	2.411	2.313	2.522	4.561	81%
Smoked	15	15	16	12	9	-23%
Total	149.558	156.909	160.927	182.172	187.451	3%

Source: Comext.

In 2016, the average import price of Atlantic mackerel was 1,73 EUR/kg which was a 13% increase from 2015. The average import price decreased by 4% in 2017 to 1,66 EUR/kg. During January – April 2018 the import price increased by 2% to 1,69 EUR/kg.

Figure 49. **IMPORT PRICE OF ATLANTIC MACKEREL**



Source: Comext.

Extra-EU Export

Mackerel is one of the most important commercial fish species in volume exported by EU Member States. In 2017, the exported volume totaled 189.000 tonnes, a 5% decrease from the previous year while total export value decreased by 1% to EUR 241 million. In 2017, Nigeria, Ghana and Egypt were the main markets for EU-export and constituted 56% of total volume and 53% of total value. In 2017, exports to Nigeria decreased by 21% in volume and 25% in value while exports to the second largest market Ghana showed a 108% growth in volume and a 71% growth in value.

More than 95% of mackerel exports consist of round frozen mackerel. In 2017, exports from the Netherlands reached 72.000 tonnes worth nearly EUR 92 million, a decrease of 22% in volume and 14% in value from 2016.

Table 7. **EXTRA-EU EXPORT OF ATLANTIC MACKEREL TO MAIN MARKETS (value in 1000 EUR, volume in tonnes)**

Catching nation	2013		2014		2015		2016		2017	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Nigeria	52.199	43.054	142.077	115.217	126.844	104.446	95.349	81.408	75.689	61.048
Ghana	8.598	7.517	6.920	7.947	7.678	8.551	13.475	12.471	28.032	21.311
Egypt	11.265	11.242	25.870	26.738	35.051	36.629	25.497	23.940	24.694	24.450
Russia	34.518	21.357	38.201	21.294	4.731	3.800	8.098	6.589	23.216	16.330
Ukraine	19.094	12.214	11.074	7.545	5.058	3.962	13.182	9.869	13.794	9.610
Japan	4.883	2.411	6.247	4.709	7.075	4.845	5.332	3.660	11.242	7.875
Other	57.226	38.885	83.262	60.583	79.224	63.089	82.160	60.554	64.720	48.619
Total	187.782	136.680	313.650	244.033	265.661	225.322	243.093	198.491	241.387	189.243

Source: Comext.

Intra-EU trade

A large share of the mackerel products traded consists of exchanges between the Member States. In 2017, the top five intra-EU exporters of mackerel were the Netherlands, the UK, Portugal, Denmark and Germany constituting 67% of total value and 73% of volume. In 2017, intra-EU exports increased by 12% in volume and 15% in value from 2016.

Table 8. **INTRA-EU TRADE OF ATLANTIC MACKEREL BY MEMBER STATE (value in 1000 EUR, volume in tonnes)**

Catching nation	2013		2014		2015		2016		2017	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Netherlands	52.199	43.054	142.077	115.217	126.844	104.446	95.349	81.408	75.689	61.048
UK	8.598	7.517	6.920	7.947	7.678	8.551	13.475	12.471	28.032	21.311
Portugal	11.265	11.242	25.870	26.738	35.051	36.629	25.497	23.940	24.694	24.450
Denmark	34.518	21.357	38.201	21.294	4.731	3.800	8.098	6.589	23.216	16.330
Germany	19.094	12.214	11.074	7.545	5.058	3.962	13.182	9.869	13.794	9.610
Spain	4.883	2.411	6.247	4.709	7.075	4.845	5.332	3.660	11.242	7.875
Ireland	57.226	38.885	83.262	60.583	79.224	63.089	82.160	60.554	64.720	48.619
Poland	187.782	136.680	313.650	244.033	265.661	225.322	243.093	198.491	241.387	189.243
Other	49.985	20.671	56.163	23.439	60.852	24.452	63.349	21.203	78.260	25.287
Total	504.289	301.852	510.851	319.691	502.694	331.078	486.847	288.292	562.293	324.035

Source: Comext.

4.4. Consumption

In 2015, EU consumption of mackerel was 1,07 kg per capita, ranking mackerel as the seventh most consumed species in the EU after tuna, cod, salmon, Alaska pollock, herring and mussels[16]. Mackerel consumption decreased by 4% from 2014, mainly due to lower EU catches in 2015. The UK's and Irish mackerel landings in the EU decreased by 33% and 17%, respectively, in 2015 from the previous year.

[16] The EU fish market, 2017.

4.5. Processing of Atlantic mackerel

Most of the mackerel in the EU is consumed in a processed form and a large share of this processing takes place in the EU. In addition to own catch/landings in the EU, the fish processing industry imports large amounts of round frozen mackerel for their fish processing facilities.

In 2017, France, Poland and Portugal were the largest processors of prepared/preserved mackerel (mostly canned), amounting to 43.000 tonnes worth EUR 212 million. Total volume showed a 5% increase in volume and a 11% increase in value over 2016[17].

In addition to canning, there is a notable mackerel smoking activity in some Member States (Poland, Germany, Lithuania, Ireland, and Romania, among others).

Table 9. **PREPARED/PRESERVED MACKEREL WHOLE OR IN PIECES (value in 1000 EUR, volume in tonnes)**

Country	2015		2016		2017	
	Value	Volume	Value	Volume	Value	Volume
France	109.980	20.672	94.344	17.446	90.832	15.806
Poland	47.241	11.574	50.427	14.310	64.670	16.528
Portugal	45.396	9.102	46.460	9.203	56.284	10.612
Spain	29.324	6.766	32.689	6.138	33.755	6.137
Other	15.829	5.105	15.365	4.975	21.103	5.823
Total	247.770	53.219	239.285	52.073	266.644	54.906

Source: PRODCOM.

[17] http://ec.europa.eu/eurostat/web/prodcom

5 Case study – Fisheries and aquaculture in Madagascar

Source: Lonely Planet.

Thanks to its significant fish resources and a dynamic aquaculture sector, Madagascar is a major player in the fisheries sector in the Indian Ocean, and a major EU partner in fish trade, especially for shrimp and tuna species. However, other value-added products are also produced targeting export markets for red seaweeds, sea cucumber, crabs, among others.

In 2017, Malagasy exports to the EU reached EUR 142 million and 21.318 tonnes, mostly frozen shrimp and canned tuna. The main EU partner for Malagasy seafood is by far France, accounting for 77% of the EU import value from Madagascar in 2017.

5.1. Production

Madagascar is a wide island situated off the eastern African coast in the Indian Ocean. As the fourth largest island in the world, Madagascar, with a coastline estimated to be 5.600 km in length, has one of the largest EEZ (Exclusive Economic Zone) in the Indian Ocean with a surface area of 1,14 million km². The continental shelf area is estimated at 117.000 km², with a larger extension in the north-western and southern part of the island. The West coast is characterized by many estuaries and bays and colonized by dense mangrove forests covering an estimated area of 3.300 km². The Eastern coast is comparatively straight and featureless, with few estuaries, capes, and bays. The coastal habitats and shallow-water marine ecosystem are dominated by coral reefs, mangroves, seagrass beds, estuarine mud flats, steep beaches and rocky shorelines. Demersal fish, which are closely associated with these habitats, form the basis of traditional fisheries in Madagascar.

Malagasy legislation distinguishes three ways of fishing: traditional (by foot or canoes, motorized or not), artisanal (engine power under, or equal to 50 HP) and industrial fishing. In 2011, the contribution of the three major fishing fleet segments to the total fish production was as follows: 71,7% traditional, 0,2% artisanal, and 28,7% industrial (domestic and foreign)[18].

Inland fishery resources in Madagascar are mostly based on lacustrine fisheries which cover a total surface area of close to 1.500 km², in addition to a few major inland water bodies. The main species caught in Malagasy inland fisheries are tilapias, carps, and black-bass. The inland fisheries potential is estimated at 30.000 tonnes per year. Fish utilization involves fishmongers and fish collectors. Most fishery products are sold on the local markets[19].

In addition, aquaculture activities are increasing in both freshwater and marine areas. While inland aquaculture is local market-oriented, marine aquaculture (mostly shrimp and red seaweeds) is designed for the export market[20].

[18] http://www.fao.org/3/a-br796e.pdf
[19] http://www.fao.org/3/a-br796e.pdf
[20] http://www.fao.org/fishery/countrysector/naso_madagascar/en

Traditional and artisanal fisheries

The small-scale fishery sub-sector operates in inshore waters within the reef ecosystem due to technological limitations. Most of the dugout canoes use oars and sails. The most common gear used by traditional fishing are gillnets, traditional traps, long-lines, hand lines, harpoons and seine nets. Official statistics suggest that total annual catch from traditional fishing is about 70.000 tonnes per year. This might however be an under-estimate given the low level of accuracy of declarations[21].

Artisanal fishing, whose development was encouraged in the 1980's in the context of shrimp fisheries (through grants from the Japanese cooperation and then through industrial boat-owners), is mostly undertaken in Morondava, on the west coast. Formerly introduced in shrimp fisheries, artisanal fishers now target mostly demersal fisheries. Their number was close to 20 vessels in 2011. Artisanal fishing is regulated through a licencing system.

Industrial fisheries

The domestic industrial fleet was mostly composed of shrimp trawlers until 2005. Since then, the number of fishing licences has decreased from about 100 to 37 in 2011 – a result of diminishing shrimp stocks despite significant efforts in terms of regulation of the fishing effort. At the same time, the number of fishing licences for demersal and pelagic fish has increased from about 10 in 2005 to 40 in 2011.

The domestic industrial fleet also includes tuna long-liners. In 2011, there were two private access agreements for tuna with Malagasy companies. The same year, another 3 licenses for long-liners flying the Malagasy flag were issued. Domestic tuna vessels have permission to fish beyond the 6 nautical mile (nm) limit from the coast. It is to be noted that foreign tuna vessels must operate in the EEZ (beyond 12 nm)[22].

National catch

Malagasy catches (by vessels operating under national licenses) exceeded 142.000 tonnes in 2016, of which 21% were provided by inland fisheries. The accuracy of national statistics does not allow to identify the catches at species level. Therefore, the main species group in terms of volume that corresponds to marine fishes not identified, likely include miscellaneous coastal species, caught by small-scale fleets. However, shrimps and tunas and tuna-like species are among the main species groups caught in Madagascar, accounting for respectively 10% and 6% of total catches in 2016. To a lesser extent sharks and rays (4%), other marine molluscs (likely to include mostly sea cucumber) and crabs (2%) represented also significant volumes[23].

During the 2007–2016 period, Malagasy catches have stayed almost stable (–4%), despite some significant fluctuations (especially for the shrimp fishery). The main trend is the strong increases in the volume of catches for other molluscs and crabs.

[21] http://www.fao.org/3/a-br796e.pdf
[22] http://www.fao.org/3/a-br796e.pdf
[23] FAO.

Table 10. **MALAGASY CATCHES BY MAIN SPECIES (volume in tonnes)**

Species group	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Marine fishes not identified	80.053	62.495	71.352	67.135	69.700	55.680	43.756	38.343	53.105	70.938
Inland fishes	32.630	32.630	32.828	35.500	30.831	27.000	23.163	22.000	25.940	30.461
Shrimps	16.604	6.683	7.330	6.509	4.280	9.934	13.483	10.344	10.549	14.569
Tunas, bonitos, billfishes	8.703	8.705	8.506	8.756	8.692	8.672	8.654	8.675	8.680	8.657
Sharks, rays, chimaeras	5.668	5.616	5.616	5.699	5.670	5.665	5.650	5.660	5.654	5.651
Other molluscs[24]	380	360	340	320	300	290	300	222	1.799	5.473
Crabs	1.370	1.370	2.580	2.019	3.700	2.824	3.909	4.515	4.749	2.908
Cephalopods	1.150	1.300	1.450	1.600	1.765	6.206	1.739	2.790	1.483	2.013
Other	2.020	2.105	2.101	2.100	2.131	1.804	3.943	3.271	2.794	1.663
Total	148.578	121.264	132.103	129.638	127.069	118.075	104.597	95.820	114.753	142.333

Source: FAO –Fishstat.

5.2. Madagascar and the EU fisheries partnership

Foreign industrial fishing, mainly specialized in tuna fisheries, is undertaken by European vessels operating under a Sustainable Fishing Partnership Agreement (SFPA) between Madagascar and the EU, and Asiatic vessels operating under agreements with private companies. The current protocol to the fisheries partnership agreement between the EU and Madagascar was signed on 19 December 2014 and covers the period 1 January 2015 – 31 December 2018 with a financial contribution of EUR 6,1 million for the whole duration of the protocol, out of which EUR 2,8 million is dedicated to the support of the fisheries policy of Madagascar[25].

This fisheries partnership agreement allows EU vessels, mainly from Spain, Portugal, Italy and France, to fish in the Malagasy waters, and is part of the tuna network fisheries agreements in the south-west zone of the Indian Ocean. The current SFPA protocol that covers the period 2015–2018 includes a reference tonnage of 15.750 tonnes per year.

Also, non–EU foreign tuna fleets operate under private access agreements for tuna between Madagascar and foreign private companies. In 2011, there were nine agreements: in addition, 10 licences for purse seiners and 50 licences for long-liners were also issued. It should be noted that catch estimates of non–EU foreign fleets are very difficult to obtain[26].

[24] Including sea cucumber.
[25] https://ec.europa.eu/fisheries/cfp/international/agreements/madagascar_en
[26] http://www.fao.org/3/a-br796e.pdf

5.3. Aquaculture

Freshwater aquaculture in Madagascar has been in place for a long time, following technological improvements and investment trends. The main freshwater species being farmed is the common carp, which was introduced in 1959. Nile tilapia, introduced in 1956, is becoming increasingly more common in ponds and in cages.

However, over the past 20 years, coastal shrimp farming has undergone rapid development. Marine algae culture is also practised by one company in conjunction with the small farmers in the north–eastern part of the island. Spirulina and sea cucumber farming were still in a start–up phase in 2011. Currently, marine aquaculture is based mainly on the giant tiger prawn (*Penaeus monodon*), farmed behind the mangrove areas on the north-west coast, which is also fished locally. In addition, tropical marine seaweed (*Eucheuma striatum*) Zanzibar strain farming, introduced in 1998, has experienced strong development in the coastal zones[27].

In 2016, total aquaculture production amounted to almost 26.000 tonnes, of which seaweeds accounted for 67% and shrimp for 16%. Freshwater aquaculture accounted for 17% of the total in 2016. Over the 2007–2016 period, the main trends have been the spectacular development of the seaweed production and the significant decrease of the shrimp production (–51%, mostly attributable to serious disease issues in farms)[28].

Table 11. **MALAGASY AQUACULTURE PRODUCTION BY MAIN SPECIES (volume in tonnes)**

Species	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Eucheuma seaweeds	3.650	3.650	3.600	4.000	1.699	1.400	3.575	6.970	15.377	17.423
Giant tiger prawn	8.457	8.000	3.260	4.000	5.405	4.952	5.362	4.691	3.447	4.139
Common carp	2.800	2.800	2.800	2.800	3.350	3.540	2.600	2.600	2.600	2.800
Nile tilapia	30	30	30	50	50	50	907	1.163	1.220	1.600
Other	6	6	26	36	40	46	105	16	50	36
Total	14.943	14.486	9.716	10.886	10.544	9.988	12.549	15.440	22.694	25.998

Source: FAO–Fishstat.

5.4. Processing

With the exception of products targeting the export markets – mostly shrimp (one processing plant) and tuna (canneries) – the processing activities are still limited in Madagascar. Most of the fisheries products from traditional fishing are sold on the domestic market. Poor conditions of storage and lack of transportation infrastructure result in high physical and/or economic post-harvest losses, particularly in remote areas. For those products with export market opportunities, such as mangrove crabs or octopus, fish export companies use processing plants and modern equipment for the collection of catch from traditional fishing, in line with EU standards. However, several investment policies currently aim to reduce these losses and improve the added value of the Malagasy fishery sector's products[29].

5.5. Trade

In the last decade, Malagasy exports of fisheries products have slightly decreased in value and volume, from EUR 136 million (30.000 tonnes) in 2007 to EUR 122 million (22.000 tonnes) in 2016, despite some fluctuations over the decade. In comparison, imports of fisheries products are much lower: EUR 19 million imported in 2016 (14.500 tonnes). The country had a positive trade balance of EUR 104 million in 2016[30].

[27] http://www.fao.org/fishery/countrysector/naso_madagascar/en
[28] http://www.gapcm.org/wp-content/uploads/2016/04/Acte-Atelier-White-Spot-perf.pdf
[29] http://www.fao.org/3/a-br796e.pdf
[30] FAO fish trade and commodity statistics

Table 12. **MALAGASY TRADE BALANCE FOR SEAFOOD (value in million EUR)**

Trade flow	2014	2015	2016
Exports	119	102	122
Imports	28	20	19
Balance	**92**	**82**	**104**

Source: FAO fish trade and commodity statistics.

Madagascar import includes a significant quantity of frozen tuna that is then processed in canneries before being exported or sold on the local market. These imports mostly include landings by foreign vessels in Malagasy ports to supply the canning industry. In 2016, Madagascar imported 14.500 tonnes of fish in total, of which approximately 13.300 tonnes was tuna, valued at EUR 16 million[31].

Seafood export is mostly composed of frozen shrimp from industrial fishing and aquaculture, as well as processed tuna from canneries. The traditional fishery sub-sector targeting high-value species such as octopus, crabs, holothurians, however, also contributes significantly to exports through systems involving fishmongers, fish collectors and fish export companies. About 85% of fish and fisheries products are exported to EU markets[32]. Of the total 2016 exports value, 64% were shrimp products and 21% were tuna products (mostly canned).

Table 13. **MAIN PRODUCTS EXPORTED FROM MADAGASCAR (2016)**

Product	Volume (tonnes)	Value (million EUR)
Shrimps, prawns	8.452	79.593
Tunas, bonitos, billfishes	7.501	26.691
Molluscs, aquatic invertebrates	1.042	3.379
Lobsters, spiny-rock lobsters	214	3.003
Crabs, sea-spiders	668	2.468
Other fish	1.129	1.942
Fish fresh or chilled, excluding fillets and meat	245	1.248
Seaweeds and aquatic plants	1.688	913
Others	25.460	2.988
Total	**22.045**	**122.441**

Source: FAO fish trade and commodity statistics.

5.6. Madagascar and the EU

In 2017, EU import of Malagasy fisheries products totaled EUR 142 million and 21.318 tonnes. The most important commodity group imported were crustaceans (67% of total import value), and tuna and tuna-like species (26%), and to a lesser extent cephalopods and other marine fish (both 3%). Most of the EU seafood imports from Madagascar were frozen products (73% of import value), whereas the rest was imported as prepared or preserved products (23%).

The main EU destination for Malagasy exports in 2017 was by far France (77% of total value). Other EU importers of Malagasy fisheries products included Spain (11%), Portugal (3%), Belgium (3%), and Italy (3%).

[31] FAO Fishstat.
[32] http://www.fao.org/3/a-br796e.pdf

Table 14. **TOP EU MARKETS FOR SEAFOOD IMPORTS FROM MADAGASCAR (value in million euros and volume in tonnes)**

	2015		2016		2017	
Country	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**
France	73,8	11.787	89,7	12.442	109,2	13.520
Spain	15,7	4.097	10,7	2.927	16,0	4.243
Portugal	0,6	103	4,3	535	4,2	496
Belgium	2,2	594	0,3	83	3,9	983
Italy	4,5	804	6,2	1.670	3,7	717
Others	4,0	1.190	3,5	923	4,5	1.359
Total	**100,8**	**18.575**	**114,8**	**18.580**	**141,6**	**21.318**

Source: Comext.

Table 15. **TOP MAIN COMMERCIAL SPECIES IMPORTED FROM MADAGASCAR (value in million euros and volume in tonnes)**

	2014		2015		2016	
Species	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**
Shrimp, warmwater	48,0	4.651	66,3	5.849	86,0	7.308
Tuna, skipjack	19,6	5.977	14,3	4.056	20,8	5.443
Tuna, yellowfin	13,1	3.265	12,8	3.504	11,6	3.282
Octopus	3,1	734	3,8	812	4,7	977
Tuna, miscellaneous	3,9	1.162	1,8	530	4,5	1.037
Other marine fish	3,4	588	3,6	649	3,6	628
Shrimp, miscellaneous	4,1	668	5,0	798	3,2	493
Crab	2,0	480	2,7	577	2,6	521
Rock lobster and crawfish	1,5	68	1,7	73	2,6	122
Other	2,0	982	2,8	1.733	1,9	1.507
Total	**100,8**	**18.575**	**114,8**	**18.580**	**141,6**	**21.318**

Source: Comext.

In comparison to import, EU export to Madagascar is much lower and correspond mostly to EU tuna vessels landing in Madagascar in the framework of the SFPA. In 2016, EU exports of fish and seafood to Madagascar totaled EUR 12 million and 7.707 tonnes. In 2017, 94% of the export value and 97% of the volume were frozen tuna (mostly skipjack and yellowfin tuna) landed in Madagascar to supply the local canneries.

6 Global highlights

EU / China / Ocean Governance: On 16 July, the European Union has signed a unique ocean partnership agreement with China**.** Parties will work together to improve the international governance of the oceans including combating illegal fishing and promoting a sustainable blue economy. The partnership also contains clear commitments to protect the marine environment and tackle climate change in accordance with the Paris Agreement[33].

EU / Blue Economy: The EU Blue Economy Initiative, which includes all economic activities related to oceans, seas and coastal areas, is growing steadily, according to the EU's first annual report on the blue economy. Fisheries, aquaculture and processing grew by 22% between 2009–2016. Increased sustainability, thanks to the EU Common Fisheries Policy, plays an important role in this positive development[34].

RFMO / SIOFA/ Sustainable Fisheries: The fifth Meeting of the Parties of the South Indian Ocean Fisheries Agreement (SIOFA) was held from 25-29 June in Phuket, Thailand. Parties, including the European Union designated five areas as interim protected areas. SIOFA decided to develop a vessel monitoring system by 2020 and to introduce entry-exit reports for all SIOFA registered vessels moving in and out of the Agreement area. Specific provisions for plastics disposal on board fishing vessels in accordance with the International Convention for the Prevention of Pollution from Ships were adopted as well[35].

Croatia / Production: In Croatia in 2017, the overall marine production was 13.843 tonnes, an increase by 5% over 2016. The main farmed marine species – European seabass (5.616 tonnes) and gilthead seabream (4.830 tonnes) – both experienced growth in production by 6% and 18%, respectively, compared to the previous year. Other farmed species include bluefin tuna, Mediterranean mussel, and oyster. Freshwater aquaculture experienced a decrease of 19% (3.272 tonnes) mainly due to strong decline in common carp production (–24%, 2.039 tonnes)[36].

EU / Vietnam / Supply: In March 2018, Vietnam's seafood exports to the EU increased by 25% over the same month in 2017, reaching EUR 30 million. The three largest importing markets are Germany, the Netherlands and Italy which all registered increase by 22%, 46% and 4%, respectively[37].

Iceland / Supply: The total catch of Icelandic vessels in June was 47.227 tonnes, a 11% decrease from the same period in 2017. Catch of demersal species was 32.000 tonnes, a decrease by 2%. Cod amounted to over 50% of total catch, but 2% less than in June 2017. Pelagic species, mostly blue whiting, amounted to 11.000 tonnes, 31% less than in June 2017. Shellfish catch was 735 tonnes, 7 tonnes less than in June 2017[38].

France / Seafood / Consumption: The annual seafood consumption per capita in France is 34 kg (wet weight). Back in 2011 it was 2 kg higher. Seafood consumption In France is declining, consumers are not yet satisfied with the level of information about production methods and contents available for seafood on offer and there is also a significant lack of trust towards retailers[39].

[33] https://ec.europa.eu/maritimeaffairs/content/eu-and-china-sign-landmark-partnership-oceans_en
[34] https://ec.europa.eu/maritimeaffairs/content/%E2%82%AC566-billion-and-growing-eu-blue-economy-thriving_en
[35] https://ec.europa.eu/fisheries/siofa-meeting-adopts-measures-sustainable-fisheries-south-indian-ocean_en
[36] https://ribarstvo.mps.hr/default.aspx?id=14
[37] http://seafood.vasep.com.vn/seafood/378_12678/up-25-in-vietnam-tuna-exports-to-the-eu.htm
[38] https://www.statice.is/publications/news-archive/fisheries/fish-catches-in-june-2018/
[39] http://en.seafood.no/news-and-media/news-archive/a-new-era-for-seafood-in-france/

7 Macroeconomic Context

7.1 Marine fuel

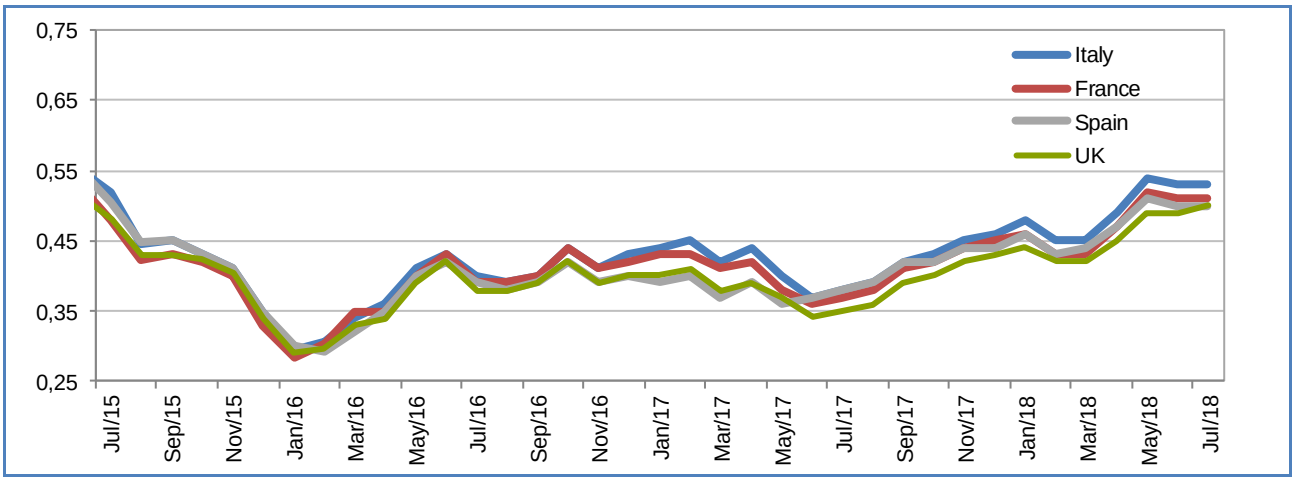
Average prices for marine fuel in **July 2018** ranged between 0,50 and 0,53 EUR/litre, in ports in **France, Italy, Spain,** and the **UK**. These prices were about 38% higher compared with July 2017, however, they remained stable compared with June 2018.

Table 16. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Jul 2018	Change from Jun 2018	Change from Jul 2017
France *(ports of Lorient and Boulogne)*	0,51	0%	38%
Italy *(ports of Ancona and Livorno)*	0,53	0%	39%
Spain *(ports of A Coruña and Vigo)*	0,50	0%	32%
The UK (ports of Grimsby and Aberdeen)	0,50	2%	43%

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

Figure 50. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**



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

7.2 Consumer prices

The EU annual inflation rate was 2,0% in June 2018, stable compared with May 2018. A year earlier, the rate was 1,5%.

Inflation: lowest rates in June 2018, compared with May 2018.

Inflation: highest rates in June 2018, compared with May 2018.

Table 17. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

HICP	Jun 2016	Jun 2017	May 2018	Jun 2018	Change from May 2018		Change from Jun 2017	
Food and non-alcoholic beverages	100,33	102,04	104,60	104,44	↓	0,15%	↑	2,35%
Fish and seafood	102,35	106,33	108,96	108,95	↓	0,01%	↑	2,46%

Source: Eurostat.

7.3 Exchange rates

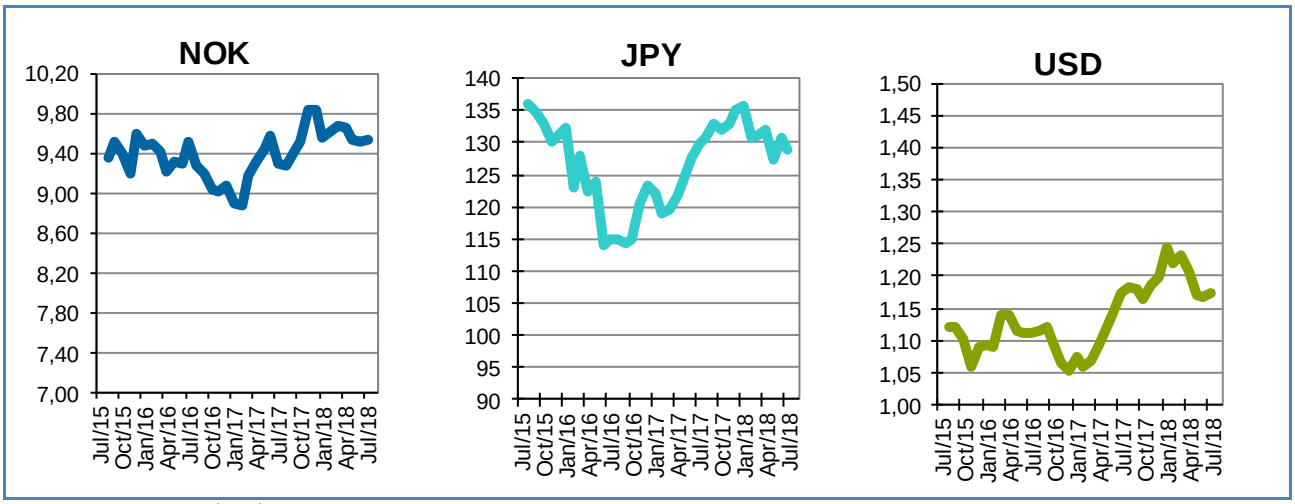
Table 18. **EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Jul 2016	Jul 2017	Jun 2018	Jul 2018
NOK	9,5092	9,3050	9,5115	9,5338
JPY	114,83	129,70	124,04	130,84
USD	1,1113	1,1727	1,1658	1,1736

Source: European Central Bank.

In July 2018, the euro appreciated against the Norwegian krone (+0,2%), the US dollar (+0,7%) and Japanese yen (+1,4%) from June 2018. For the past six months, the euro has fluctuated around 1,20 against the US dollar. Compared with a year earlier (July 2017), the euro has appreciated 2,5% against the Norwegian krone, 0,9% against the Japanese yen, and 0,1% against the US dollar.

Figure 51. **TREND OF EURO EXCHANGE RATES**



Source: European Central Bank.

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

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First sales: European Commission, FAO, GFCM.

Consumption: EUROPANEL, Fishbase.

Case study: European Commission, Prodcom, Comext, FAO, Pelagic Fish Forum, NSSL, www.cite.mg.

Global highlights: European Commission – DG MARE**,** Ministry of Agriculture of Croatia - Directorate of Fisheries, Norwegian Seafood Council, Statistics Iceland, Vietnam Association of Seafood Exporters and Producers (VASEP)

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

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

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

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

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

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

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