European Commission

Monthly Highlights

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EUMOFA

European Market Observatory for Fisheries and Aquaculture Products

In this issue

In September 2018, first–sales value and volume increased in the Netherlands, Portugal and Sweden over September 2017. In the same period, they experienced downward trends in Belgium, Denmark, Estonia, France, Latvia, Lithuania, Norway, and Poland.

During the past 36 months, average first-sales prices of Atlantic cod were the highest in Denmark (3,09 EUR/kg), which was 73% higher than in Sweden (1,79 EUR/kg), and 18% more than the average price in the UK (2,62 EUR/kg). Average first-sales prices of whiting generally increased in France and the UK, while in Italy the price declined by 5%.

In week 45 (5–11 November 2018), the import price of fresh whole haddock originating from Norway was 2,05 EUR/kg - down by 10% from a week earlier, but only 3% below the average price of 2,10 EUR/kg thus far in 2018.

In January–August 2018, the average retail price of fresh anchovy for household consumption in Italy was 5,58 EUR/kg, 2% higher compared with January–August 2017.

The EU has a positive trade balance with Japan with a surplus of EUR 247 million in 2017 generated mainly by tunas.

Italy, the main EU producer of clams, farmed 82% and landed 28% of clams in the EU in 2016.

The EU and Gambia signed a new Sustainable Fishing Partnership Agreement protocol. This agreement allows EU vessels to fish in Gambian waters for a financial contribution of EUR 550.000 annually.

Contents

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1 First sales in Europe

In **January–September 2018**, 12 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: The Netherlands, Sweden and Portugal experienced growth in first-sales value and volume, the latter country's growth being of a lower intensity compared with the first two countries. The Netherlands saw large increases due to a high supply of blue whiting and Atlantic horse mackerel, whereas growth in Sweden occurred because of herring, the species that accounts for 70% of total catches.

Decreases in value and volume: In Belgium, France, Italy, Latvia, Poland and the UK a downward trend was observed in both value and volume terms. The most significant drop was registered for Latvia, and was linked to lower supplies of herring, sprat, smelt and cod. The UK followed, recording the decrease mainly because of lower supplies of mackerel, cuttlefish and scallop.

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

	January–September 2016		January–September 2017		January–September 2018		Change from January–September 2017	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
BE	12.192	47,55	11.576	46,33	10.150	43,74	-12%	-6%
DK	179.170	263,64	183.943	249,60	188.321	250,35	2%	0%
EE	33.958	8,12	33.294	7,84	32.563	7,87	-2%	0%
FR	144.966	484,82	143.147	485,02	141.554	470,67	-1%	-3%
IT*	65.266	242,91	71.154	256,26	64.621	237,47	-9%	-7%
LV	36.280	7,83	41.705	8,47	27.699	5,21	-34%	-38%
LT	1.560	1,10	1.160	1,09	1.200	0,94	3%	-14%
NL	45.881	188,34	146.616	297,38	278.735	415,93	90%	40%
NO	1.935.845	1.622,97	2.047.402	1.567,18	2.171.824	1.502,74	6%	-4%
PL	87.535	29,09	75.290	25,01	68.585	21,21	-9%	-15%
PT	78.590	151,08	74.070	149,13	78.212	153,06	6%	3%
SE	84.692	65,86	62.025	49,83	100.392	58,39	62%	17%
UK	318.109	579,67	228.030	415,23	183.092	332,39	-20%	-20%

Source: EUMOFA (updated 16.11.2018); 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 September 2018

Increases in value and volume: Compared to September 2017, the first sales grew only in the Netherlands, Portugal and Sweden. The increase was particularly high for Portugal mainly because of higher harvests of octopus (+210% in value and +252% in volume) and in the Netherlands, where it was linked to the harvests of herring and blue whiting.

Decreases in value and volume: First sales dropped in Belgium, Denmark, Estonia, France, Latvia, Lithuania, Norway, and Poland. The decreases were particularly high in Estonia, Latvia and Poland due to low harvests of important small pelagics species, including herring and sprat. These trends could be explained by allocated quotas (Total Allowable Catches) based on the Multiannual plan for the stocks of cod, herring and sprat in the Baltic Sea[2].

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

	September 2016		September 2017		September 2018		Change from September 2017	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
BE	1.073	4,18	1.309	5,57	1.109	4,48	-15%	-20%
DK	27.493	38,48	35.499	37,23	29.546	30,76	-17%	-17%
EE	771	3,74	3.744	0,92	1.453	0,44	-61%	-52%
FR	15.370	51,45	15.087	51,86	14.668	50,05	-3%	-3%
IT*	7.775	22,52	6.967	22,98	7.876	22,59	13%	-2%
LV	4.705	1,01	5.476	1,11	2.318	0,40	-58%	-64%
LT	145	0,11	51	0,05	30	0,03	-39%	-36%
NL	7.983	34,56	32.181	53,28	40.522	60,71	26%	14%
NO	208.601	212,09	193.970	187,84	148.333	112,20	-24%	-40%
PL	7.669	2,97	5.273	2,21	1.830	0,85	-65%	-61%
PT	13.855	23,65	11.092	17,50	16.208	21,28	46%	22%
SE	7.763	9,00	12.826	8,28	13.715	8,38	7%	1%
UK	36.830	66,04	18.234	31,09	17.968	33,73	-1%	8%

Source: EUMOFA (updated 16.11.2018); volume data is reported in net weight.
**Partial data. First-sales data for Italy covers 229 ports (approximately 50% of the total landings).*

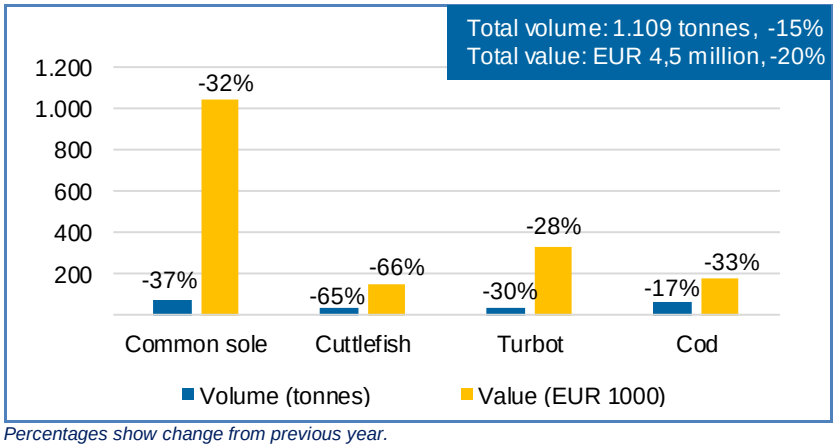
The most recent first-sales data for **October 2018** available on EUMOFA website can be accessed **here.**

[2] https://ec.europa.eu/fisheries/commission-proposes-baltic-sea-fishing-opportunities-2019-increased-quotas-plaice-and-western-cod_en

1.3 First sales in selected countries

In **Belgium** in **January–September 2018**, first sales fell by 6% in value and 12% in volume, compared with January–September 2017. This was due to decreased first sales of monk, ray, cod, and gurnard. In **September 2018**, both value and volume decreased sharply compared with September 2017. Common sole, cuttlefish, turbot and cod were the main contributors to these decreases. Average prices of cod and scallop declined by 19% and 28%, respectively.

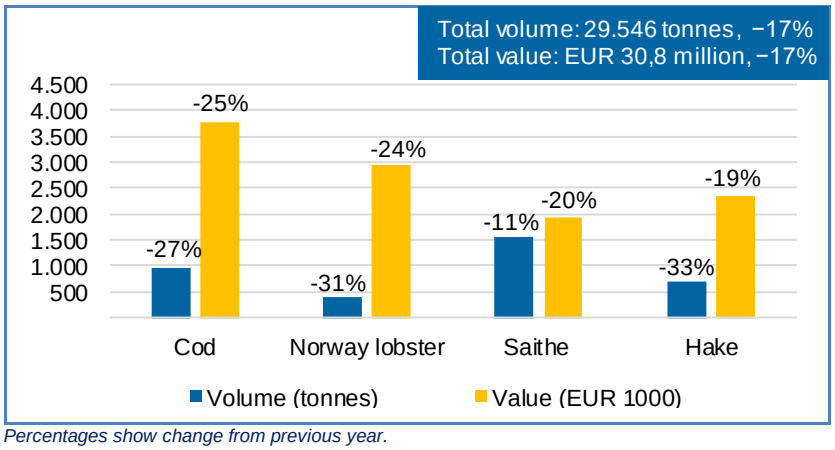
Figure 1. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN BELGIUM, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

In **Denmark** in **January–September 2018**, first-sales value remained stable, while volume slightly increased, compared to the same period in 2017 due to higher sales of mackerel. In **September 2018**, both first-sales value and volume were down by 17% due to herring, Norway lobster, saithe and hake. Mussel *Mytilus* spp. and clam contributed the most to the volume decrease. Lower supply of mussel increased its average price by 79%, whereas higher supply of shrimp *Crangon* spp. generated a price decline of 39%.

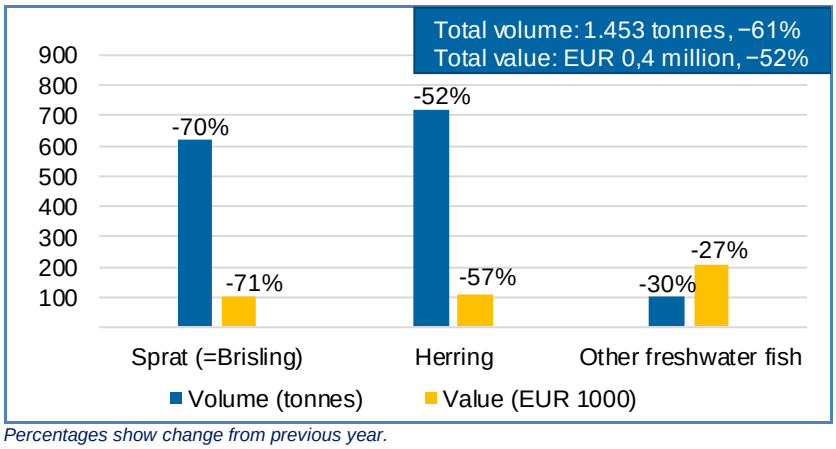
Figure 2. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN DENMARK, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

In **January–September 2018**, **Estonia** experienced a stable first-sales value, although volume fell by 2% from the same period a year before, due mainly to herring. In **September 2018**, compared to September 2017, first sales declined by more than half due to lower supplies of sprat and herring, and various freshwater fish species. Consequently, prices increased, especially for pike-perch and European flounder (+52% and +26%), respectively.

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

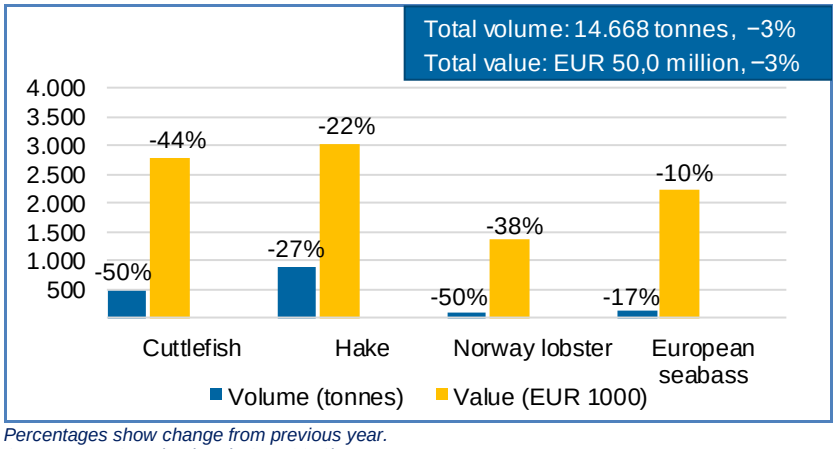


Percentages show change from previous year.

Source: EUMOFA (updated 16.11.2018).

In **France** in **January–September 2018**, first sales slightly decreased in both value (−3%) and volume (−1%) from the same period in 2017. Lower supplies of hake (−2.600 tonnes) and Norway lobster (−4.295 tonnes) were the key reasons for these trends. In **September 2018**, compared to a year earlier, both value and volume were down by 3% mainly due to cuttlefish and hake, with smaller declines also for Norway lobster and European seabass.

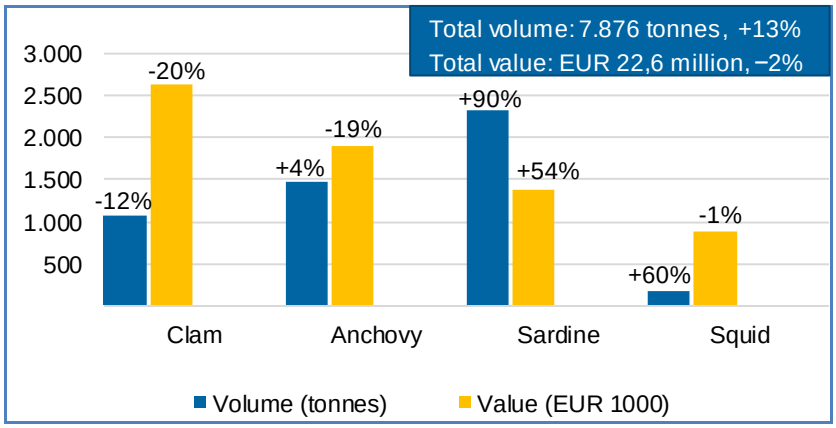
Figure 4. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN FRANCE, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

In **Italy** in **January–September 2018**, first sales decreased by 7% in value and 9% in volume. Clam was the main species responsible for such trends (−29% in value and −28% in volume). In **September 2018,** first-sales value slightly declined due to the same species, whereas volume grew by 13% mainly because of anchovy, sardine and squid. Lower average prices were registered for clam (−9%) and anchovy (−23%), compared to September 2017.

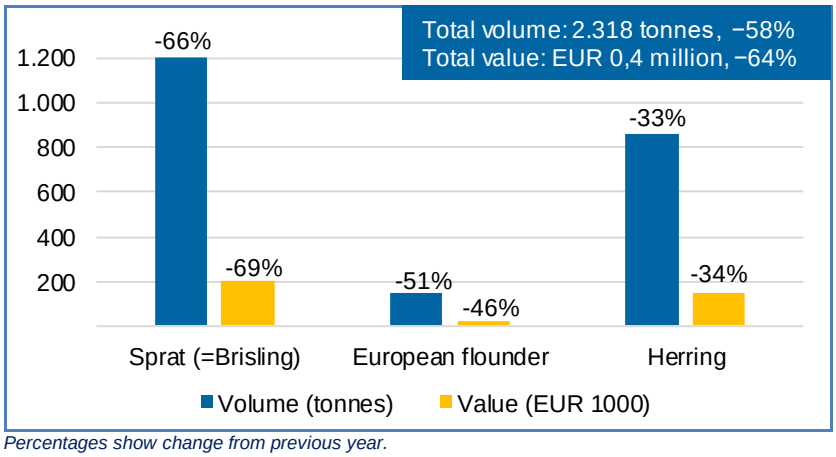
Figure 5. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN ITALY, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

In **Latvia** in **January–September 2018,** first sales decreased in value (−38%) and volume (−34%) from the same period in 2017. Due to lower supplies of herring (−34%), sprat (−33%), smelt (−27%), and cod (−72%), **September 2018** saw continued sharp decreases for the same species as well as European flounder. The average price of cod was 27% lower, while that of European flounder increased by 11% over September 2017.

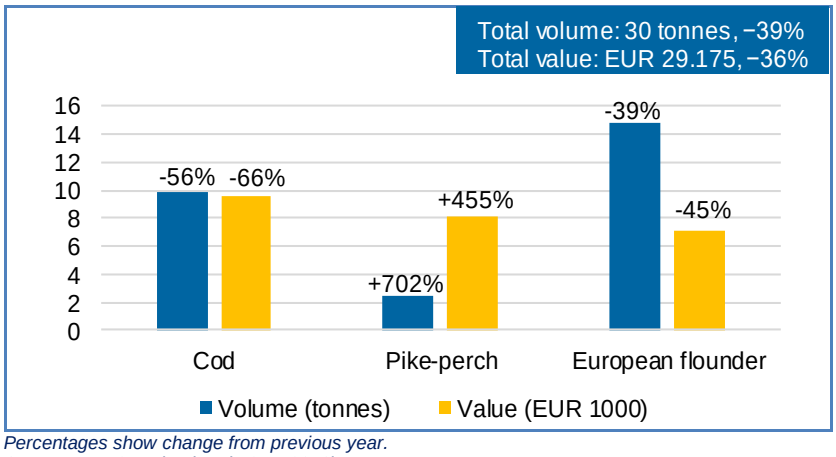
Figure 6. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN LATVIA, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

In **Lithuania** in **January–September 2018**, first-sales value decreased by 14% due mainly to cod (−56%), whereas volume increased by 3% because of higher supplies of herring (+172%) and smelt (+50%), compared to January–September 2017. In **September 2018**, first-sales value and volume declined by 36% and 39%, respectively, due to cod, European flounder and pike-perch. Average prices of cod and pike-perch went down by 24% and 31%, respectively, and reached 0,97 EUR/kg and 3,26 EUR/kg.

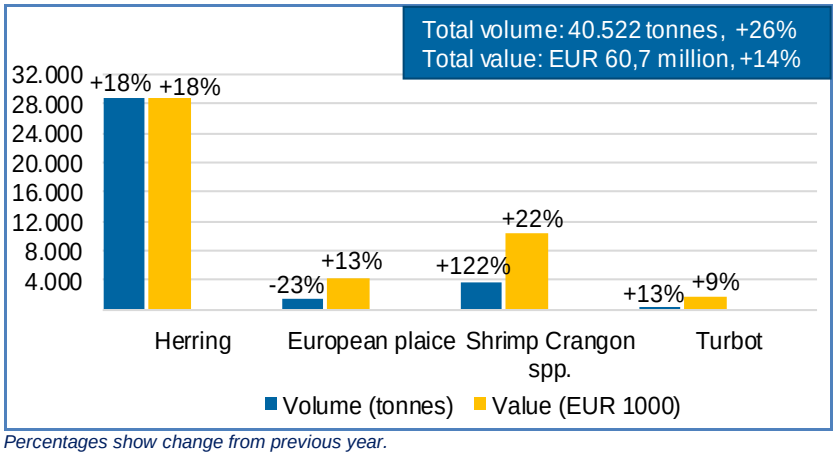
Figure 7. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN LITHUANIA, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

In the **Netherlands** in **January–September 2018**, first-sales value and volume grew by 40% and 90%, respectively, due to blue whiting (a fourfold increase) and horse mackerel (up threefold). **September 2018** saw a continuation in these upward trends mainly due to higher supply of herring. Of the top species, European plaice registered an average price increase of 47%, while gurnard prices fell by 14%.

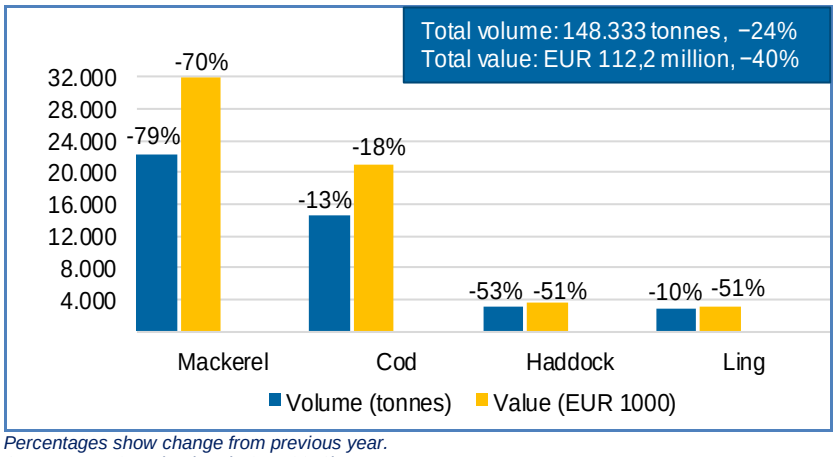
Figure 8. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

In **Norway** in **January–September 2018**, first-sales value decreased by 4%, mainly because of mackerel (−30%), whereas volume increased by 6% due to herring (+92%) and to other miscellaneous small pelagics (+203%). In **September 2018**, both first-sales value and volume decreased from September 2017. This was a result of lower catches of mackerel and to a lesser extent of haddock, ling and cod. Along with the large drop in its volume, the average price of mackerel increased significantly (+44%) to 1,44 EUR/kg.

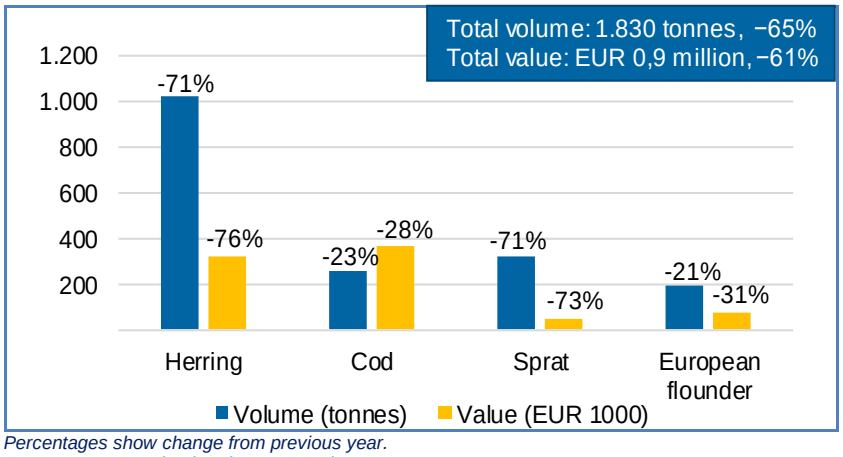
Figure 9. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN NORWAY, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

In **Poland** in **January–September 2018**, both first-sales value (−15%) and volume (−9%) fell due to lower sales and average prices of sprat and herring. In **September 2018**, both first-sales value and volume decreased by more than 60% due to cod, herring and sprat, which experienced large declines in volume and price. The average price of cod decreased by 7% to 1,40 EUR/kg, whereas that of herring fell by 16% to 0,31 EUR/kg.

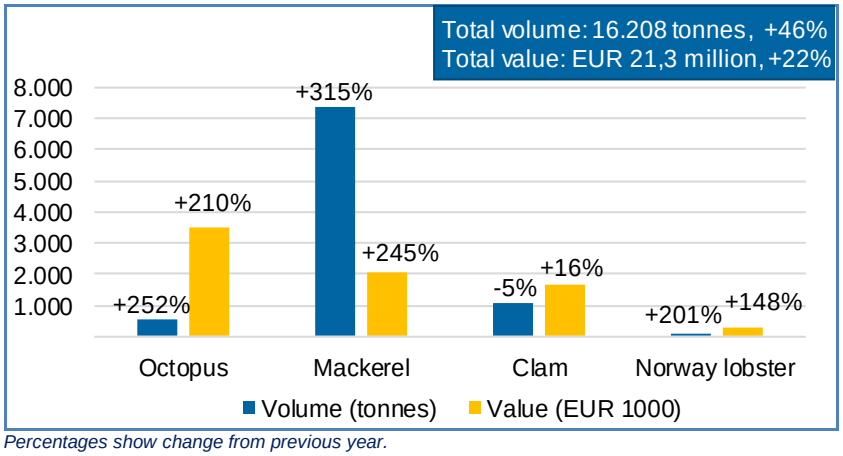
Figure 10. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN POLAND, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

In **Portugal** in **January–September 2018**, first-sales rose by 3% in value and 6% in volume due to mackerel, clam and squid, compared to the same period in 2017. In **September 2018**, the first-sales value and volume increase over September 2017 was much more intense. This was mainly because of mackerel, octopus, clam and Norway lobster. Compared to the same period in 2017, an average price decline was recorded for octopus (down by 12% to 6,60 EUR/kg) and mackerel (down by 17% to 0,28 EUR/kg).

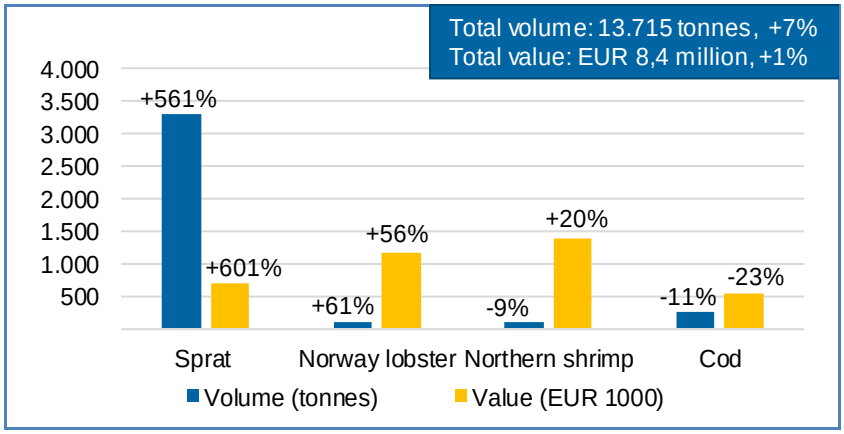
Figure 11. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN PORTUGAL, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

In **Sweden**, first sales grew in both value (+17%) and volume (+62%) during **January–September 2018**. The growth was due to herring, which recorded increases of 72% and 41%, respectively, in value and volume terms. Comparing first sales of **September 2018** with those of one year before, the overall increase of value and volume was smaller due to higher sales of sprat. Of the top species, the price of Northern shrimp increased by 32% (to 13,02 EUR/kg), whereas that of cod fell by 14% (to 2,07 EUR/kg).

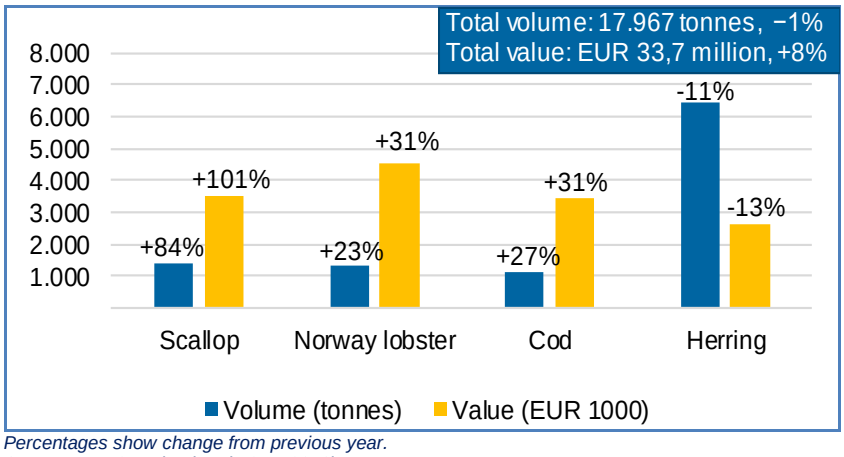
Figure 12. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN SWEDEN, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

In the **UK** in **January–September 2018** from a year earlier, both first-sales value and volume decreased by 20% due to mackerel, scallop, hake, and cuttlefish. In **September 2018**, the trend in value reversed, while volume was stable compared with September 2017. Scallop, Norway lobster, cod, and crab contributed to the overall value growth. Lower landings of herring and cuttlefish contributed to the overall slight decrease in first-sales volume. Among the key species, the average price of crab grew the most, rising by 38% to 2,42 EUR/kg.

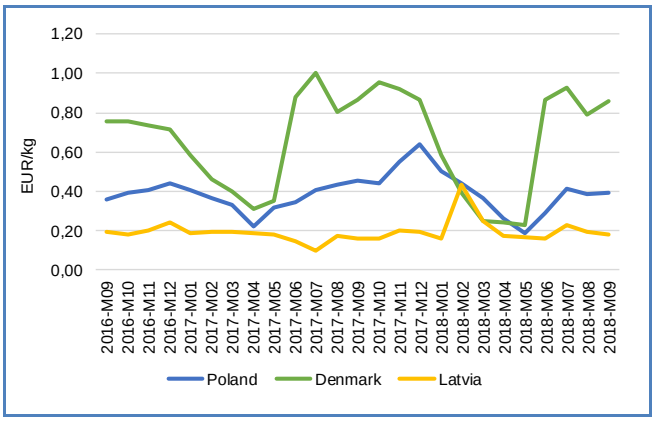
Figure 13. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN THE UK, SEPTEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 16.11.2018).

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

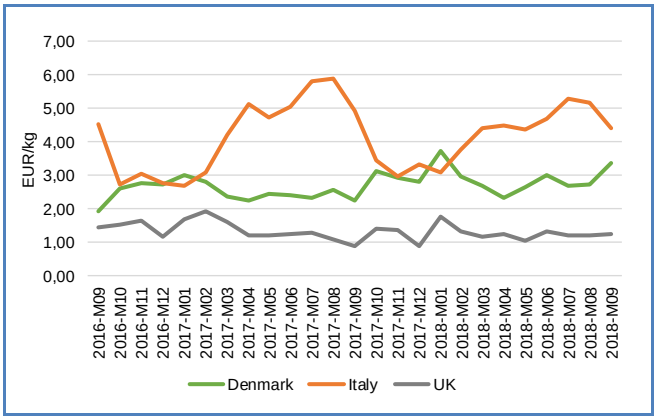
Figure 14. **FIRST–SALES PRICES OF EUROPEAN FLOUNDER IN POLAND, DENMARK, AND LATVIA**



Source: EUMOFA (updated 28.11.2018).

First sales of **European flounder** among reporting countries take place primarily in **Poland** (65% of 2018 volume to date), **Denmark** (21%), and **Latvia** (4%). The average first-sales price in **September 2018** was 0,39 EUR/kg in Poland (up by 1% from August 2018 but down by 13% from September 2017), 0,86 EUR/kg in Denmark (up by 9% from the previous month and unchanged from the same month in 2017), and 0,18 EUR/kg in Latvia (down by 7% from August 2018 but up by 11% from a year earlier). Within each national market, prices in these three countries are strongly correlated with local volumes, rising when volumes fall and vice versa. This link between local price and local volume holds even when the price trend in one country differs from trends in others, suggesting there is not much trade in fresh whole European flounder in response to differing market prices.

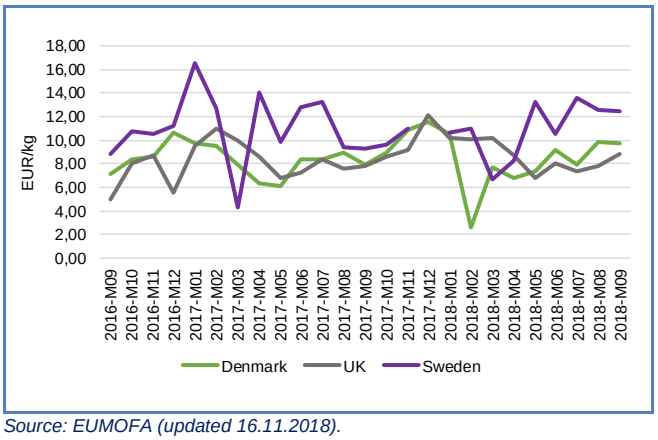
Figure 15. **FIRST–SALES PRICES OF FLOUNDERS (OTHER THAN EUROPEAN FLOUNDER) IN DENMARK, ITALY, AND THE UNITED KINGDOM**



Source: EUMOFA (updated 16.11.2018).

First sales of **flounders** (other than European flounder) in the EU take place mainly in **Denmark, Italy**, and **the UK,** which combined have had a 77% share of this market in 2018. The average first-sales price in **September 2018** was 3,37 EUR/kg in Denmark (up by 24% from August 2018 and by 49% from September 2017), 4,39 EUR/kg in Italy (down by 15% from the previous month and by 11% from the same month in 2017), and 1,25 EUR/kg in the UK (up by 5% from August 2018 and by 41% from a year earlier). Prices in Denmark and the UK follow similar trends because both their harvesters and markets operate nearby, while the average monthly price in Italy often moves in opposite directions in part due to a different species mix in the catch of flounders.

Figure 16. **FIRST–SALES PRICES OF ATLANTIC HALIBUT IN DENMARK, THE UNITED KINGDOM, AND SWEDEN**



Source: EUMOFA (updated 16.11.2018).

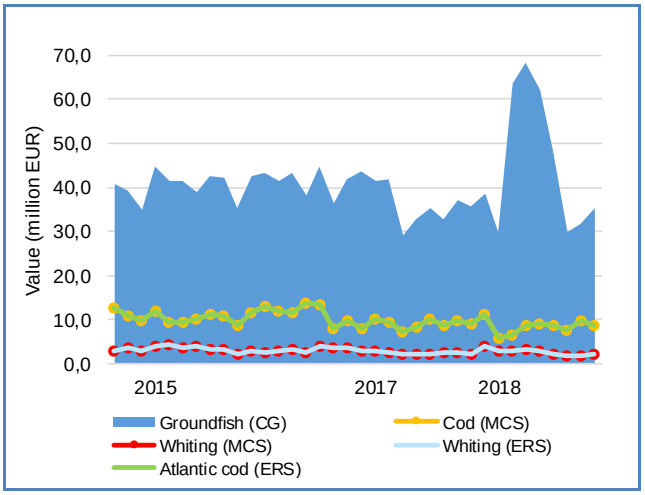
First sales of **Atlantic halibut** occur mainly in **Denmark** (81% of total volume in 2018) and **the UK** (17%), with smaller amounts in **Sweden** and other countries. The average first-sales price in **September 2018** was 9,74 EUR/kg in Denmark (down by 1% from August 2018 but up by 22% from September 2017), 8,81 EUR/kg in the UK (up by 14% from the previous month and by 13% from the same month in 2017), and 12,48 EUR/kg in Sweden (down by 0,5% from a month earlier but up by 35% from a year ago). The average prices in these three markets are correlated with local supply availability, and follow similar trends, with all three following a slight upward trend over the two-year period.

1.5. Commodity group of the month: Groundfish

The **Groundfish** commodity group (CG) ranked 3rd in value and 2nd in volume among 11 commodity groups sold at first-sales stage in September 2018[3]. First sales of groundfish species reached EUR 35,3 million and 17.973 tonnes – remaining stable in value although volume increased by 14% over September 2017. In the past 36 months, the highest value of groundfish was registered in April 2018, when it reached more than EUR 68 million.

The Groundfish commodity group includes 12 main commercial species (MCS): blue whiting, cod, grenadier, hake, ling, pollack, pouting, redfish, saithe, whiting and other groundfish. At the species (ERS[4]) level, Atlantic cod and whiting together made up 24% of total first-sales value of groundfish species during January–September 2018[5].

Figure 17. **FIRST-SALES VALUE COMPARISON AT CG, MCS, AND ERS LEVEL FOR REPORTING COUNTRIES**



Source: EUMOFA (updated 16.11.2018).
**Norway excluded due to a limited level of data for species at ERS level.*

1.6. Focus on Atlantic cod

Atlantic cod (*Gadus morhua*) is a fish of the family Gadidae. It can be found on the continental shelves and in coastal waters throughout the North Atlantic. It is a benthopelagic species, living at depths of less than 200 m. Fourteen different cod stocks exist in the Northeast Atlantic, of which the largest is the Arctic stock, located off the coast of Norway. There are also two stocks of Baltic cod, the Eastern and Western Baltic cod. The latter is the smaller of the two[6]. On average, Atlantic cod weighs 5 to 12 kg. It can live up to 25 years and usually reproduces for the first time when five or six years old. Atlantic cod reproduce during a one to two-month spawning season annually. Cod has lean, moist meat with a dense, but very flaky texture[7].

Atlantic cod is caught mainly with generic gillnets, bottom trawls and longlines with hooks, usually in mixed demersal fisheries with a bycatch of flatfish and other groundfish species.

Long-term EU management plan concern the stocks in the North Sea, Kattegat, the Skagerrak, the Eastern Channel, the west of Scotland and the Irish Sea, and the Eastern and Western Baltic. The management plans include the setting of annual TACs shared by 14 Member States, restrictions on fishing effort, minimum mesh size, catch composition rules, minimum landing size, and closed areas/seasons[8]. The objective of these management plans is to reduce fishing mortality to rates that can maximise long-term sustainable yield[9].

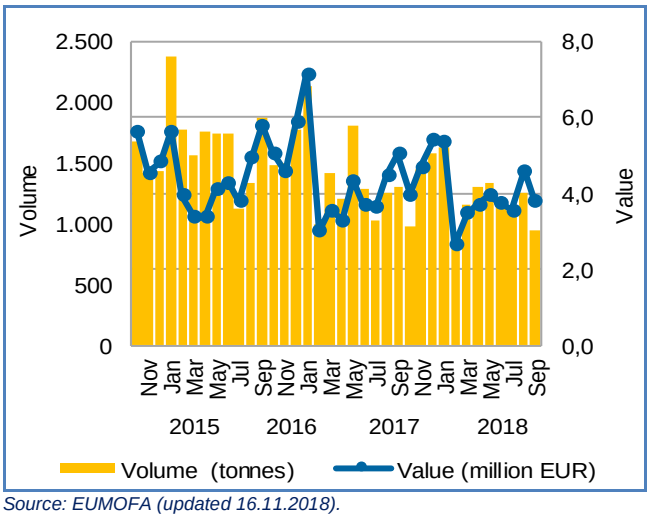
Selected countries

[3] More data on commodity groups can be found in table 1.2 in the Annex.
[4] Species reported at Electronic Reporting System (ERS) level, based on FAO 3-alpha codes.
[5] Ranking of the main commercial species in the Groundfish species commodity group can be found in table 1.3 in the Annex.
[6] http://ec.europa.eu/fisheries/marine_species/wild_species/cod/index_en.htm
[7] http://thisfish.info/fishery/species/atlantic-cod/
[8] REGULATION (EU) 2016/2094 http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32016R2094
[9] https://ec.europa.eu/fisheries/cfp/fishing_rules/multi_annual_plans/

In **Denmark** in January−September 2018, first sales of Atlantic cod decreased by 9% in value, and 14% in volume compared to the same period in 2017. Compared to January−September 2016 value decreased by 11% and volume by 30%. In September 2018, first-sales value and volume fell by 25% and 27%, respectively, relative to the same month in 2017.

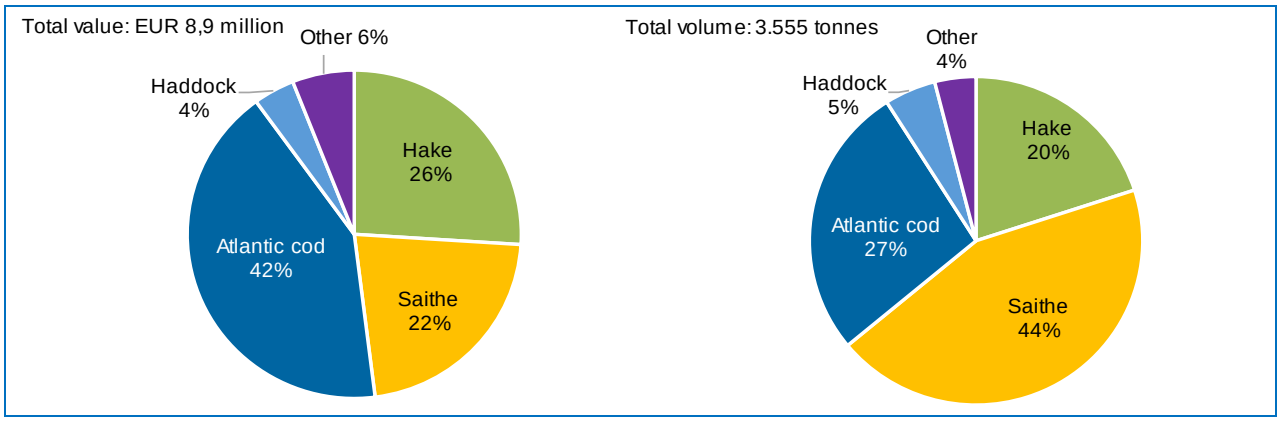
Most cod sales occur in the North Sea (89%), with higher values registered in the ports of Hanstholm, Thyborøn and Hirtshals. Remaining sales take place in the Baltic Sea.

Figure 18. **ATLANTIC COD: FIRST SALES IN DENMARK**



Source: EUMOFA (updated 16.11.2018).

Figure 19. **FIRST–SALES COMPARISON OF GROUNDFISH SPECIES IN DENMARK IN VALUE AND VOLUME, SEPTEMBER 2018**

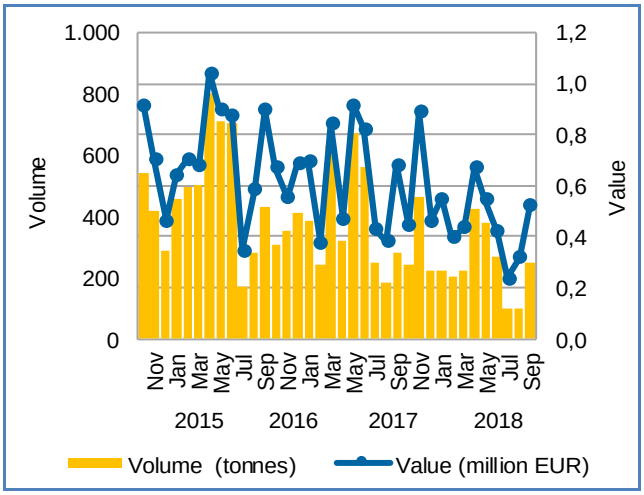


Source: EUMOFA (updated 16.11.2018).

Sweden's cod fishery has regular fluctuations which are linked to the fisheries' seasonality. In January–September 2018, first sales of Atlantic cod decreased significantly from the same period in 2017, by 27% in value and nearly 40% in volume. Compared with 2016, first sales plunged by 39% in value and over 50% in volume. In September 2018, value and volume fell by 23% and 11%, respectively, from September 2017.

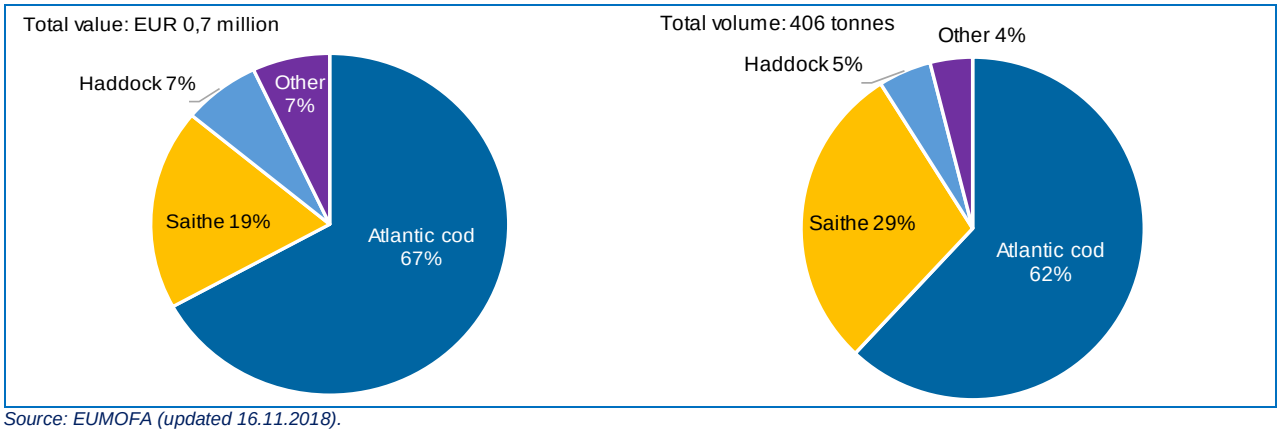
First sales of cod occur in both the North and Baltic Seas. Among the locations with the highest first sales is the port of Göteborg.

Figure 20. **ATLANTIC COD: FIRST SALES IN SWEDEN**



Source: EUMOFA (updated 16.11.2018).

Figure 21. **FIRST–SALES COMPARISON OF GROUNDFISH SPECIES IN SWEDEN, VALUE AND VOLUME, SEPTEMBER 2018**

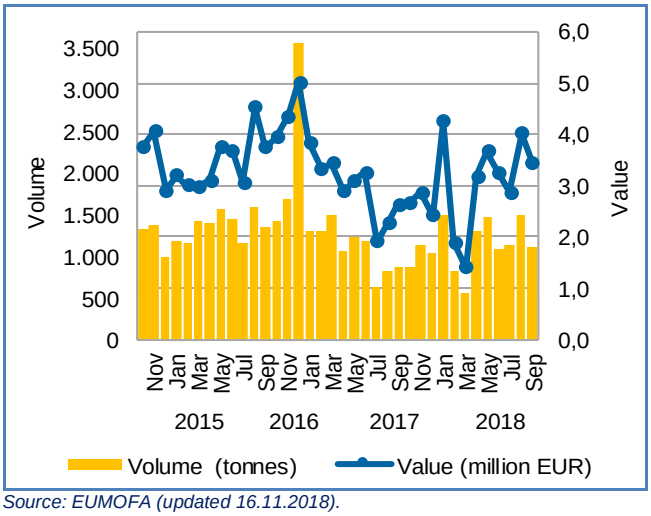


Source: EUMOFA (updated 16.11.2018).

In **the UK** in January–September 2018, first-sales value and volume of Atlantic cod grew by 5% over January–September 2017. However, a comparison of the same period in 2016 shows a reversed trend as value decreased by 10% and volume fell by 15%. September 2018 recorded increases by 31% in value and 27% in volume compared to the previous year.

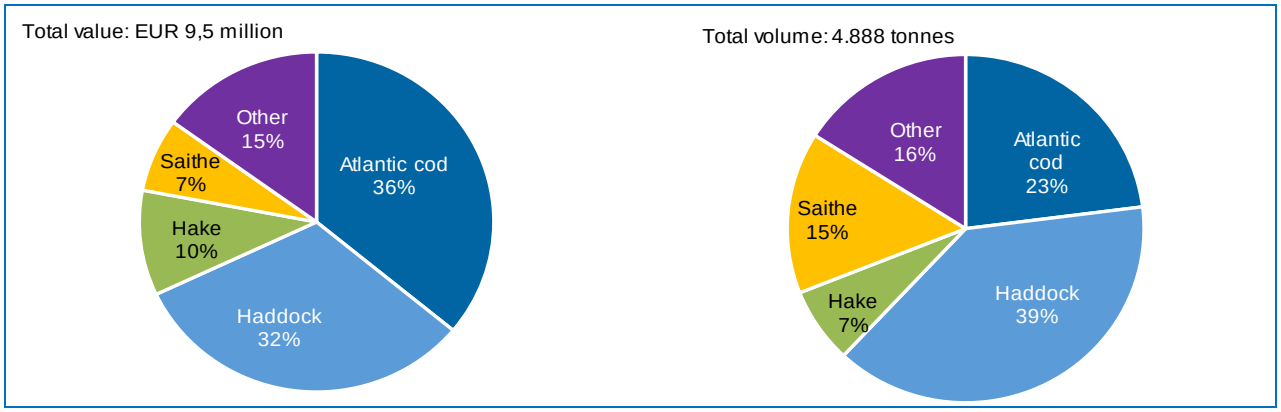
Nearly all of cod's first sales were on the UK's North Sea coast (92%), and the rest on the Celtic seas coast. Over 60% of sales in January–September 2018 occurred at the ports of Peterhead and Lerwick.

Figure 22. **ATLANTIC COD: FIRST SALES IN THE UK**



Source: EUMOFA (updated 16.11.2018).

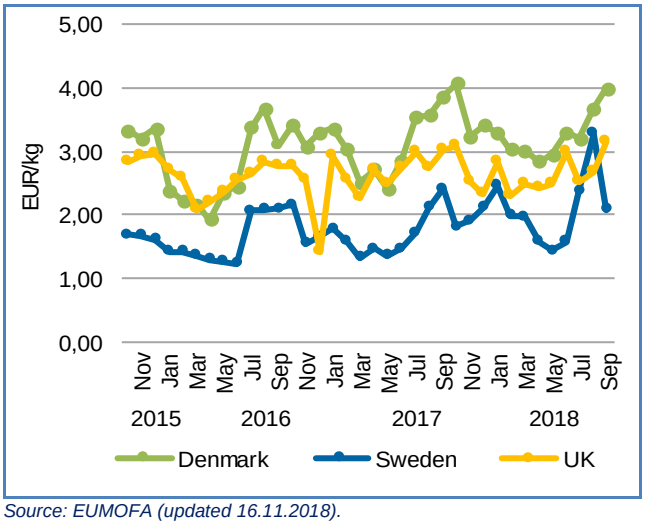
Figure 23. **FIRST–SALES COMPARISON OF GROUNDFISH SPECIES IN THE UK, VALUE AND VOLUME, SEPTEMBER 2018**



Source: EUMOFA (updated 16.11.2018).

Price trends

Figure 24. **ATLANTIC COD: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 16.11.2018).

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

First sales: Denmark (2/2017, 8/2015), France (2/2017), Latvia (5/2014), Lithuania (6/2016, 2/2015, 1/2014), Norway (4/2016), Sweden (2/2017, February 2013, December 2013), the United Kingdom (2/2017).

Consumption: Belgium (July 2013), (Denmark (3/2016), France (4/2015, July 2013), Germany (3/2016), Ireland (3/2016), Lithuania (3/2016, 4/2015), Poland (4/2015), Portugal (4/2015), Sweden (July 2013), the UK (3/2016, 472015, July 2013).

Topic of the month: Cod in Lithuania (June 2013).

Trade: Extra-EU import (4/2015).

During the past 36 months, average first-sales prices of Atlantic cod increased in all three analysed countries. Prices were the highest in Denmark (3,09 EUR/kg), which was 73% higher than in Sweden (1,79 EUR/kg) and 18% more than the average price in the UK (2,62 EUR/kg).

In **Denmark** in the first nine months of 2018, the average price increased by 6% to 3,24 EUR/kg compared to January−September 2017, and 26% above levels in 2016. However, the price peak was recorded in October 2017 (4,06 EUR/kg) when 979 tonnes were sold. The lowest average price occurred in April 2016 when 1.756 tonnes were sold for 1,93 EUR/kg. The highest cod fishery seasons are during the winter period (especially in December).

In **Sweden**, the average price of Atlantic cod (1,90 EUR/kg) in the first nine months of 2018 was higher than in the same period in 2017 (+19%) and 2016 (+29%). Supply and average prices are in close relation as they fluctuate throughout the year. The highest recorded price in the three-year period was in August 2018 when the price reached 3,28 EUR/kg for a volume of only 97 tonnes. The lowest price was recorded in June 2016 at 1,24 EUR/kg when supply of 704 tonnes was among the highest in the observed period.

Reaching 2,67 EUR/kg in January−September 2018, average price in the **UK** decreased by 1% from 2017 but increased by 6% over the first nine months of 2016. The highest price was recorded in September 2018 when 1.101 tonnes were sold at an average price of 3,14 EUR/kg, whereas the lowest price at 1,40 EUR/kg for 3.571 tonnes occurred in December 2016. The average price is generally linked inversely with supplies.

1.7. Focus on whiting

Whiting (*Merlangius merlangus*) is commonly found in the Northeast Atlantic, from the areas of the Barents, Black, Aegean seas to the Adriatic Sea. This species is found at depths of 10–200 m, mainly on muddy and gravel bottoms, but also on sand and rock. It is a fast-growing species. Spawning occurs between the British Isles and the Bay of Biscay in January–September. In the Mediterranean, spawning takes place earlier from January to spring. Whiting feeds on shrimp, crab, molluscs, and cephalopods[10].

Whiting is a popular species, consumed mainly fresh. It is sold whole and filleted, fresh or frozen, and less often dried, salted or smoked[11].

Catches occur in the North and Celtic seas, as well as in the English Channel all year-round, with peaks from January to April. Whiting is caught mainly by bottom trawl in mixed-species fisheries, in association with cod, haddock, and plaice. It can also be taken as bycatch by trawlers targeting Norway lobster. Small volumes are also line-caught.

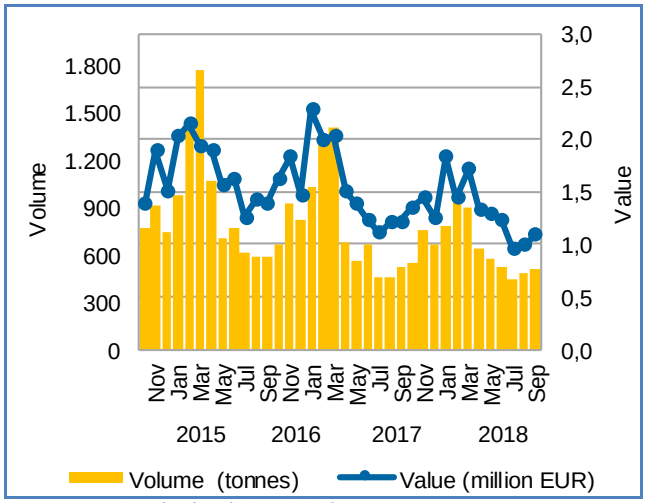
The minimum catch size is 27 cm. Whiting is subject to Total Allowable Catches (TACs). TACs for EU vessels in the Atlantic and North Sea are 46.728 tonnes in 2018[12].

Selected countries

In **France** in January–September 2018, first-sales value and volume of whiting dropped by 15% and 18%, respectively, from the same period in 2017. First sales were down by 22% in value and 31% in volume compared with 2016. In September 2018, first-sales value was nearly stable, whereas volume decreased by 11% compared to the same month a year earlier.

Ports that recorded highest first-sales value during January-September 2018 are situated in the Atlantic Ocean (Le Guilvinec), the English Channel (Cherbourg), and the North Sea (Boulogne).

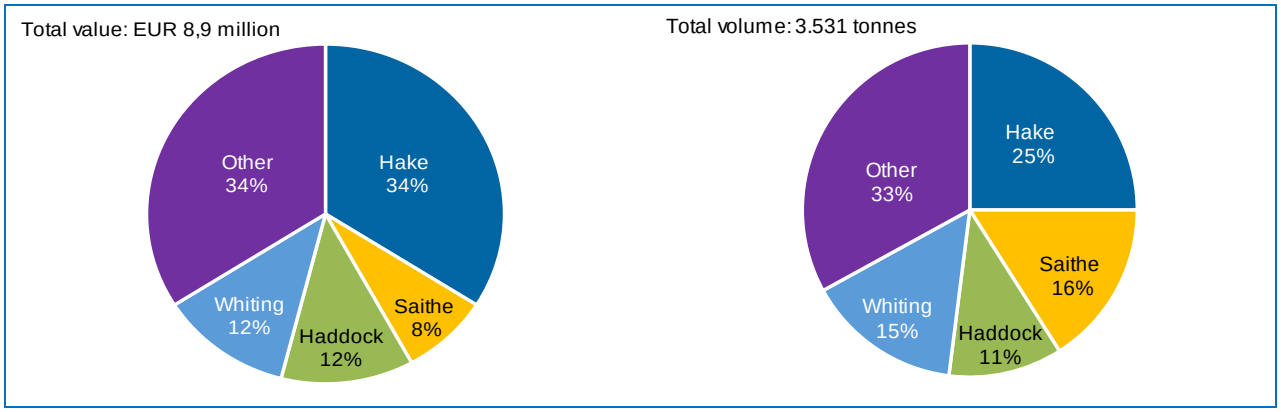
Figure 25. **WHITING: FIRST SALES IN FRANCE**



Source: EUMOFA (updated 16.11.2018).

[10] http://www.fao.org/fishery/species/3022/en
[11] http://www.cornwallgoodseafoodguide.org.uk/fish-guide/whiting.php
[12] COUNCIL REGULATION (EU) 2018/120 https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX:32018R0120

Figure 26. **FIRST–SALES COMPARISON OF GROUNDFISH SPECIES IN FRANCE, VALUE AND VOLUME, SEPTEMBER 2018**

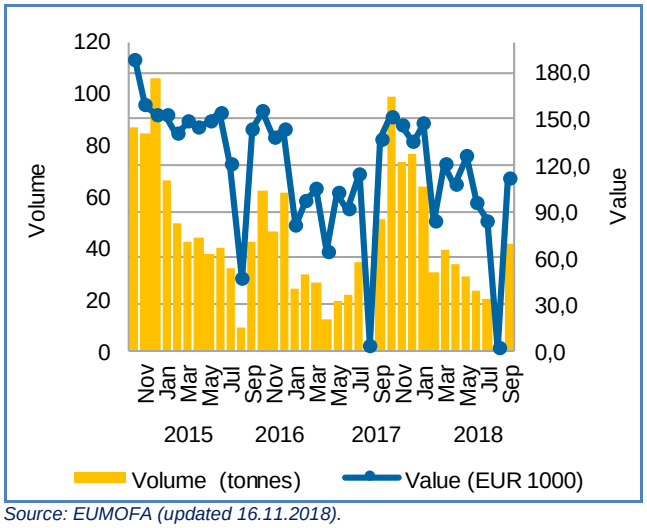


Source: EUMOFA (updated 16.11.2018).

In **Italy** in January–September 2018, first sales of whiting grew in both value (+10%) and volume (+27%) over the same period in 2017. Compared to 2016, value and volume were about a quarter lower. In September 2018, first-sales value and volume declined by 18% and 20%, respectively, from September 2017. In the past three years supply has been the lowest during the summer period.

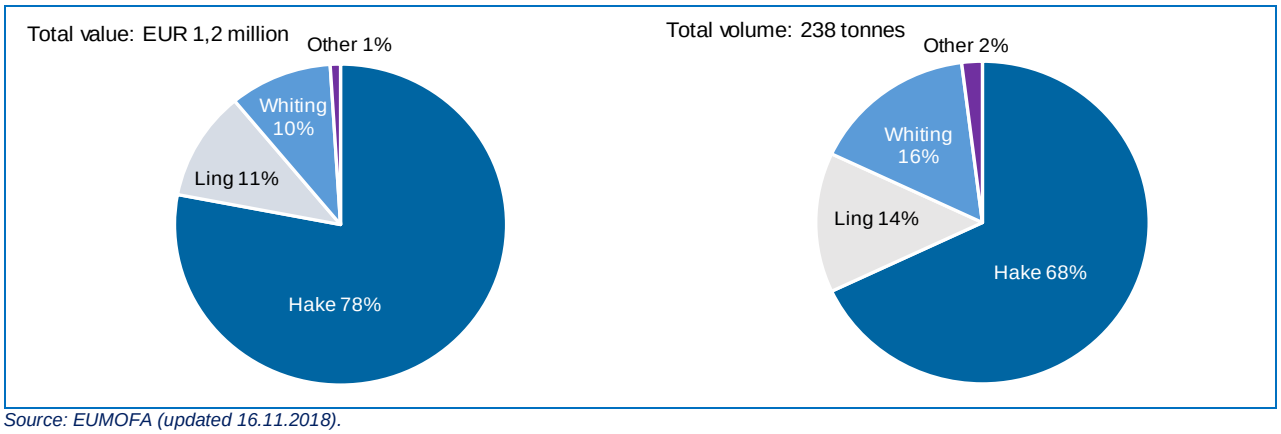
The ports of Chioggia, Rimini and Porto Tolle accounted for 71% of first-sales value in 2018.

Figure 27. **WHITING: FIRST SALES IN ITALY**



Source: EUMOFA (updated 16.11.2018).

Figure 28. **FIRST–SALES COMPARISON OF GROUNDFISH SPECIES IN ITALY, VALUE AND VOLUME, SEPTEMBER 2018**

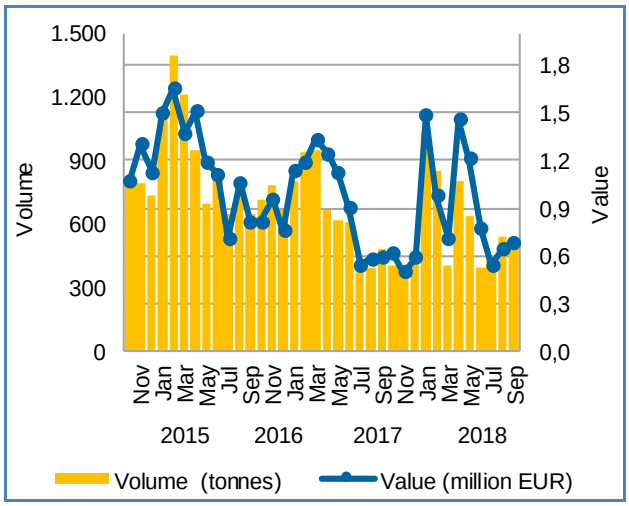


Source: EUMOFA (updated 16.11.2018).

In the **UK** in January−September 2018, in comparison with the same periods in 2017 and 2016, first sales of whiting fell in value by 2% and 22%, whereas volume dropped by 4% and 32%, respectively. In September 2018, first sales rose by 15% in value and 3% in volume over September 2017, with the average price at 1,51 EUR/kg. The whiting fishery in the UK is seasonal, with the regular peaks during the winter season (January−March).

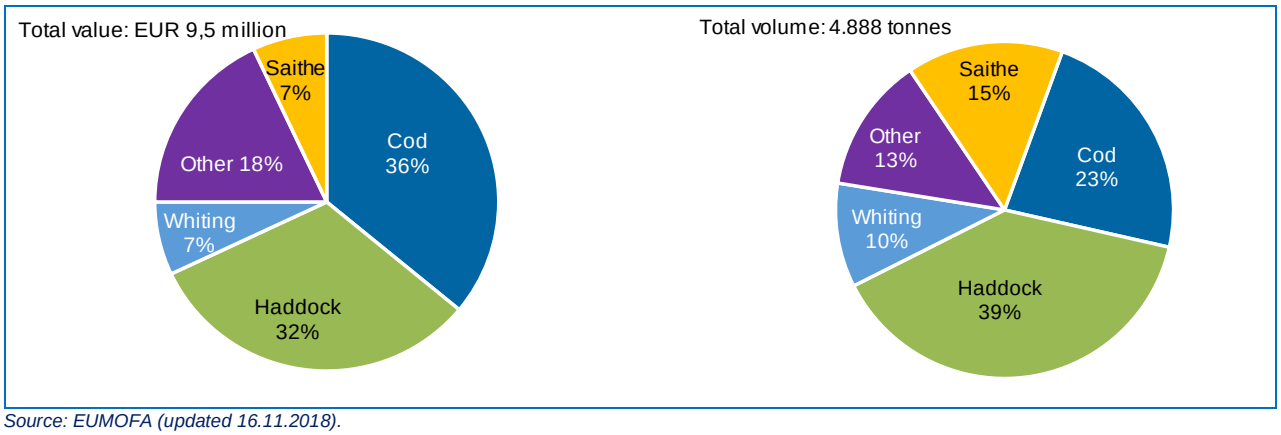
In January−September 2018, first sales occurred almost entirely in the North Sea. The highest sales took place in the ports of Peterhead, Lerwick, and Fraserburgh.

Figure 29. **WHITING: FIRST SALES IN THE UK**



Source: EUMOFA (updated 16.11.2018).

Figure 30. **FIRST−SALES COMPARISON OF GROUNDFISH SPECIES IN THE UK, VALUE AND VOLUME, SEPTEMBER 2018**



Source: EUMOFA (updated 16.11.2018).

Price trends

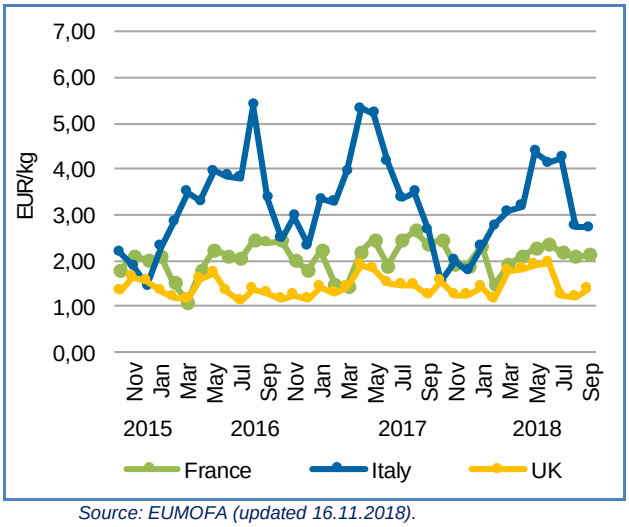
Over the past three years, the average first-sales price of whiting increased in France and the UK but decreased in Italy. The highest prices were observed in Italy (3,20 EUR/kg), more than double (+125%) than in the UK (1,42 EUR/kg) and 56% over the average price in France (2,05 EUR/kg).

In **France**, in the first nine months of 2018, the average first-sales price (2,04 EUR/kg) increased by 4% and 13% over 2017 and 2016, respectively. Nonetheless, the highest monthly price was recorded in August 2017, at 2,65 EUR/kg for 455 tonnes, whereas the lowest price was registered in March 2016, when a volume of only 1.770 tonnes was sold for 1,09 EUR/kg. The high season in the whiting fishery is during February−March.

In **Italy**, the country with the lowest first sales of whiting among surveyed countries, the average price of whiting during January–September 2018 was 3,13 EUR/kg, a decrease of 13% from the same period in 2017 and 5% from 2016. For the past three years, prices in Italy were highest during April–August. The peak occurred in August 2016 at 5,40 EUR/kg when only 9 tonnes were sold, while the lowest average first-sales price occurred in December 2015 at 1,45 EUR/kg for 106 tonnes. Average prices fluctuate in close relation with supply.

In **the UK** in the first nine months of 2018, the average price of whiting reached 1,51 EUR/kg – an increase of 2% over the same period in 2017 and 15% over 2016. In the past three years, peak prices have regularly occurred during April and June. The highest price at 1,93 EUR/kg was recorded in June 2018 when 397 tonnes were sold. The lowest price in the three-year period occurred in July 2016 at 1,10 EUR/kg for 644 tonnes.

Figure 31. **WHITING: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 16.11.2018).

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

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

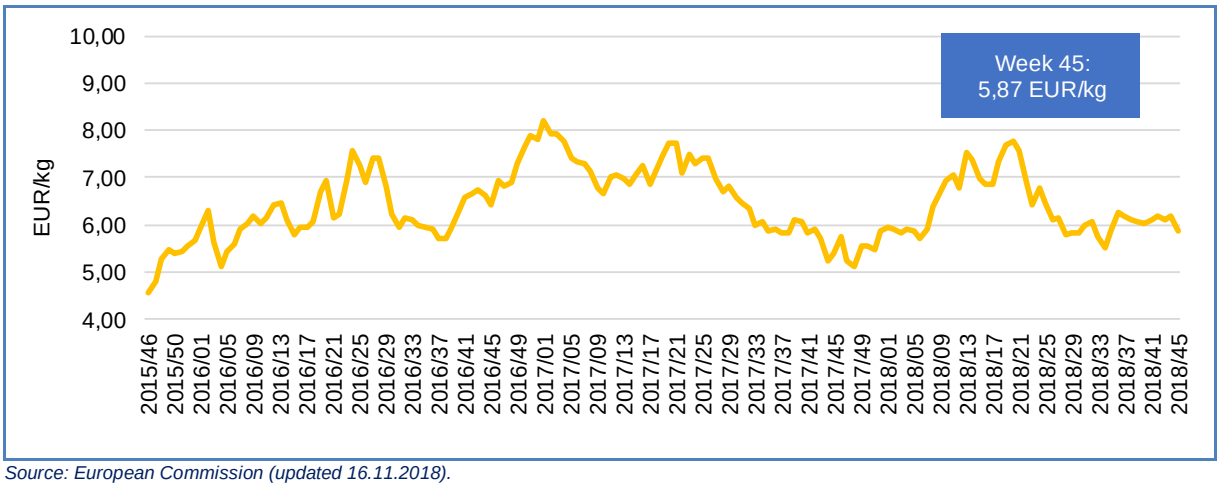
Consumption: France (7/2017).

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: fresh Atlantic salmon from Norway, frozen Alaska pollock from China, and frozen tropical shrimp (genus Penaeus) from Ecuador. Six other species change every month, and this issue of Monthly Highlights looks at live or fresh scallops, prepared or preserved anchovies, and preparations of surimi, along with three species products that are examined each month as part of the month's selected commodity group, which this month is groundfish and the selected species products are fresh whole haddock, fresh cod fillets, and fresh whole redfish.

For fresh whole **Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway**, the EU import price took a turn down in **week 45** (5–11 November), to 5,87 EUR/kg, a decline from the previous week of 0,32 EUR, or –5%. This product's price remains low, after falling during the summer from peak 2018 levels in May. The import price is highly correlated to changes in supplies from Norway, where sources reportedly expect that seasonal demand for salmon during the holidays will enable prices to recover.

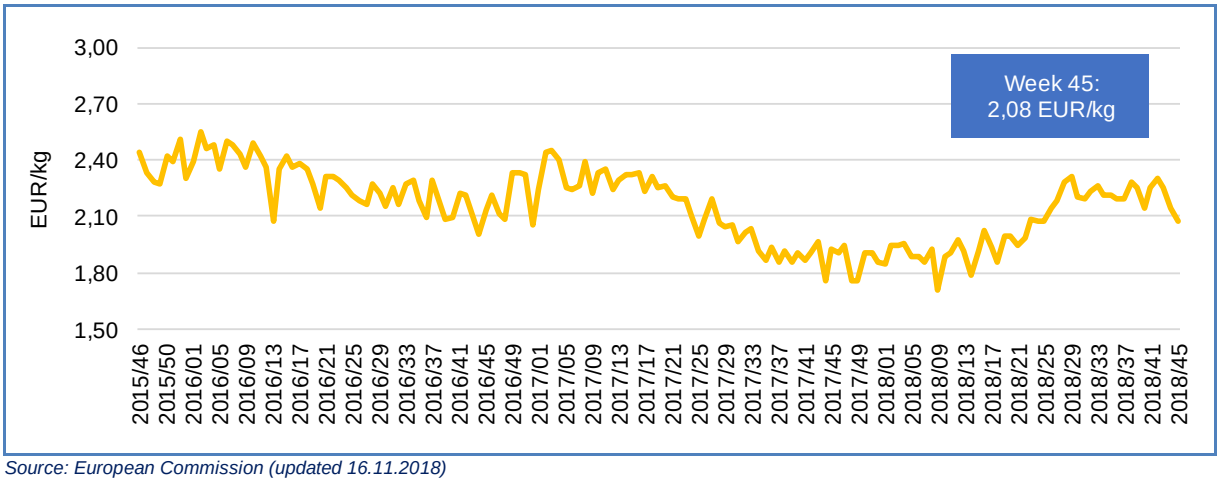
Figure 32. **IMPORT PRICE OF ATLANTIC SALMON, FRESH WHOLE FROM NORWAY**



Source: European Commission (updated 16.11.2018).

The weekly price of frozen fillets of **Alaska pollock** (*Theragra chalcogramma*, CN code 03047500) imported from **China** continued to decline, falling to 2,08 EUR/kg in **week 45** of 2018, down by –3% from the previous week and by –10% from a recent high of 2,31 EUR/kg in week 42. Prices remain higher than in the winter months of 2017–2018, when they reached their lowest level at 1,71 EUR/kg (in week 9 of 2018). There has been a general rise in prices in 2018 which, if it continues to year's end, would signal the first significant turn-around since at least 2015.

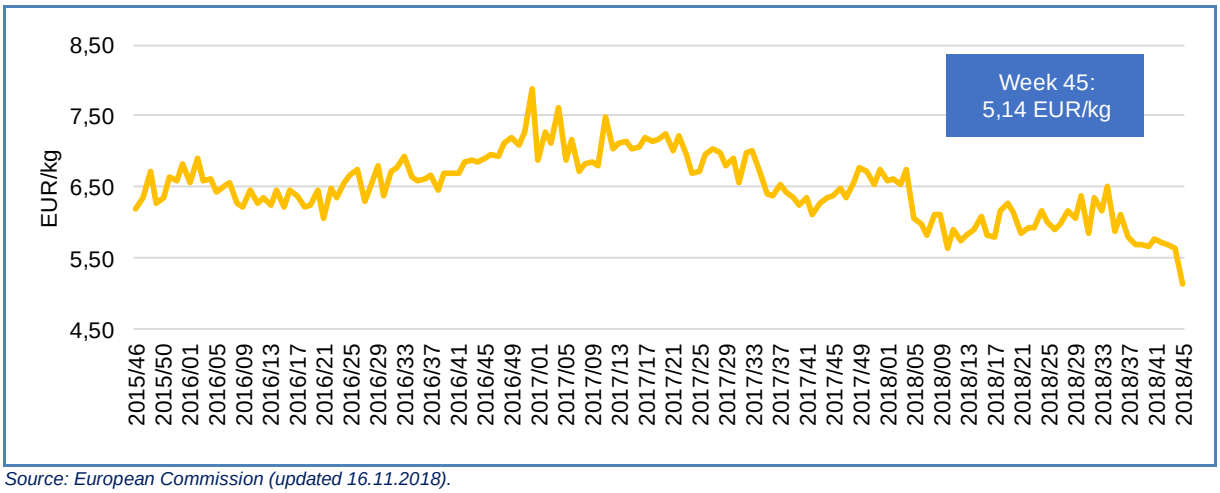
Figure 33. **IMPORT PRICE OF ALASKA POLLOCK, FROZEN FILLETS FROM CHINA**



Source: European Commission (updated 16.11.2018)

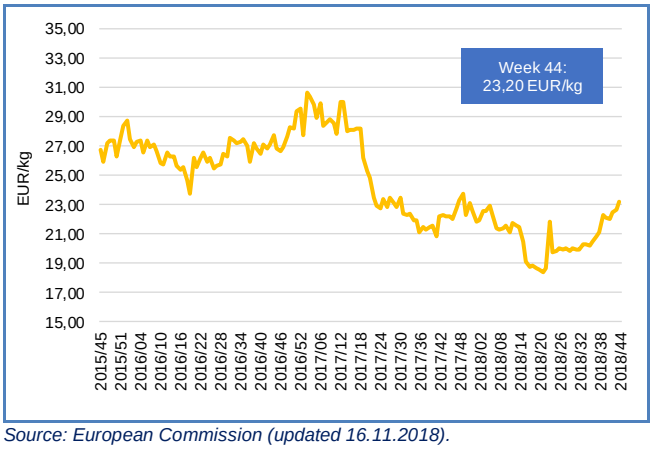
The price of frozen **tropical shrimp** (genus *Penaeus*, CN code 03061792) imported from Ecuador dropped by 9% in **week 45** from the previous week, to 5,14 EUR/kg. This product's price has been falling irregularly since the beginning of 2017 (from a price of 7,88 EUR/kg in week 52 of 2016), as world markets for tropical shrimp remain fully supplied. Average weekly volumes thus far in 2018 are almost unchanged from the same period a year ago.

Figure 34. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR**



Source: European Commission (updated 16.11.2018).

Figure 35. **IMPORT PRICE OF SCALLOPS, INCLUDING QUEEN SCALLOPS, LIVE, FRESH OR CHILLED FROM THE US**

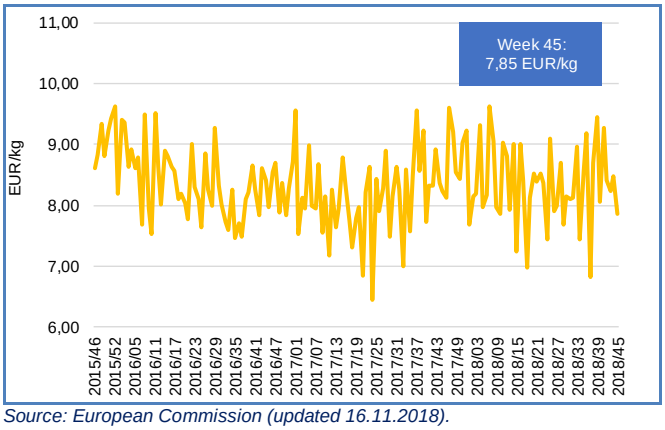


Source: European Commission (updated 16.11.2018).

For **scallops**, including queen scallops, live, fresh or chilled (of the genera *Pecten, Chlamys* or *Placopecten*, CN code 03072100), imported from the US, the EU import price in **week 44** was 23,20 EUR/kg. This was 2% higher than a week earlier. This product's price has followed since a very long upward trend at the beginning of 2011, which ended in week 2 of 2017, when volume of imports from the US followed a corresponding decline. During much of the time since, the average price has been decreasing, while imported volumes, currently still far below levels in 2011–2014, have increased significantly from record lows recorded in 2016.

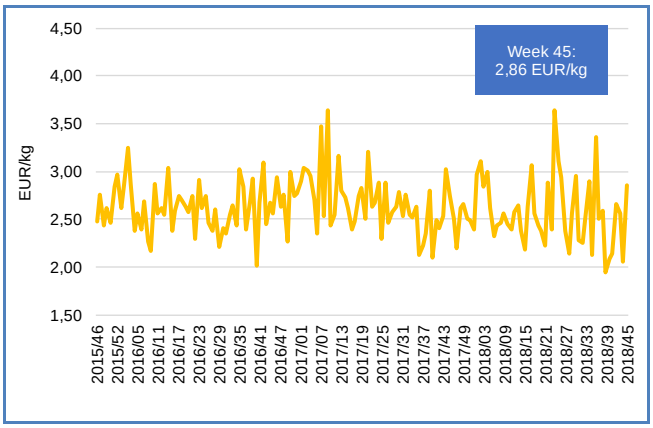
EU imports of **anchovies**, whole or in pieces, but not minced, prepared or preserved (CN code 16041600) from Morocco are mostly in airtight containers and the long run trend in price reflects relatively predictable supplies and stable demand. The price in **week 45** was registered at 7,85 EUR/kg was down by 7% from a week earlier, but the average price of 8,38 EUR/kg during the last six weeks is similar to the average price of 8,34 EUR/kg during the three-year period beginning in week 45 of 2015. Import volumes can be highly erratic from one week to another but can be considered as stable over the long-run.

Figure 36. **ANCHOVIES, WHOLE OR IN PIECES, BUT NOT MINCED, PREPARED OR PRESERVED FROM MOROCCO**



Source: European Commission (updated 16.11.2018).

Figure 37. **IMPORT PRICE OF PREPARATIONS OF SURIMI FROM THAILAND**

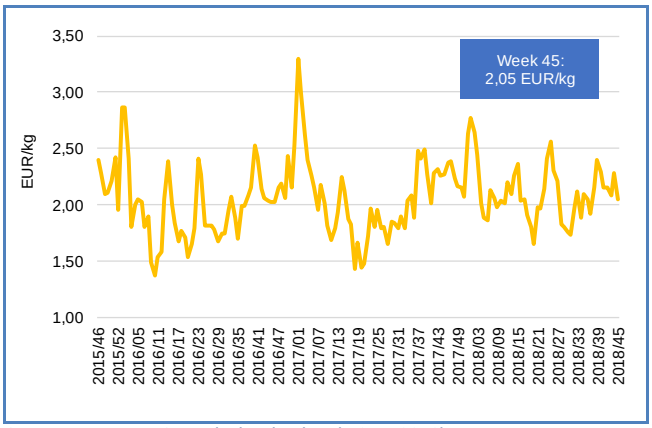


Source: European Commission (updated 16.11.2018).

The price of preparations of **surimi** (CN code 16042005) imported from Thailand was 2,86 EUR/kg in **week 45**, an increase of 39% from just a week earlier. This price is highly volatile, and it routinely moves 50% in either direction in one or two weeks. The average price during the last three years has been 2,62 EUR/kg, ranging from a high of 3,64 EUR/kg in both week 9 of 2017 and week 24 of 2018, to lows of 2,01 EUR/kg in week 40 of 2016 and 1,95 EUR/kg in week 39 of 2018. Nevertheless, the long-run trend for this product's price is nearly flat. Weekly volumes are even more volatile and bear no clear relationship to prices.

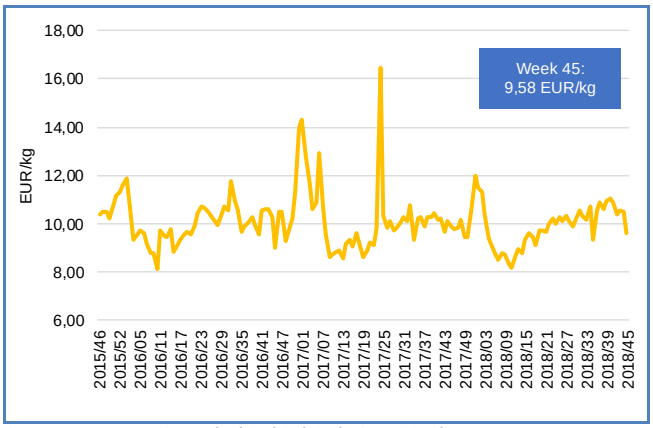
For fresh whole **haddock**, (*Melanogrammus aeglefinus*, CN code 03025200) imported from Norway, the import price was 2,05 EUR/kg in week 45, down by 10% from a week earlier, but only 3% below the average price of 2,10 EUR/kg thus far in 2018. Haddock prices show a clear seasonal pattern as well as short-run movements clearly connected to supply availability. The price tends to peak in mid-winter and decline in spring to annual low points in the summer. Within these cycles, prices are higher in periods with low volumes, and vice versa. The volume pattern is a mirror image (upside down) of these price movements.

Figure 38. **IMPORT PRICE OF FRESH WHOLE HADDOCK FROM NORWAY**



Source: European Commission (updated 16.11.2018).

Figure 39. **IMPORT PRICE OF FRESH FILLETS OF COD FROM ICELAND**

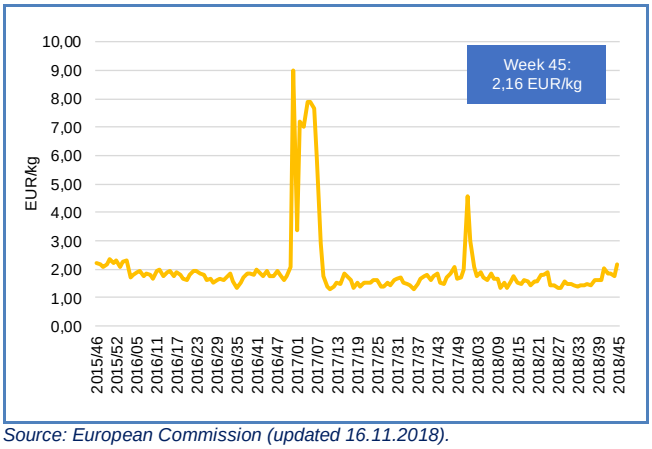


Source: European Commission (updated 16.11.2018).

The price of EU imports of fresh fillets of **cod**, (*Gadus* spp., and fish of the species *Boreogadus saida*, CN code 03044410) from Iceland turned downward in **week 45**, falling to 9,58 EUR/kg, a drop of 9% from the previous week. There was an upward climb in price that began in week 11 at 8,17 EUR/kg and ended at a peak of 11,03 EUR/kg in week 40. Since then, the price has declined. The price of fresh cod, like haddock, is tied to volume but not so strongly, and changes in cod volume only partly explain movements in cod prices. The cod record price at 16,45 EUR/kg in week 24 of 2017, for example, occurred during a brief period of volume peaks. One explanation is that cod has more substitutes than haddock, which has some particular consumption patterns (e.g. fish and chips in the UK).

The import price of fresh whole **redfish** (*Sebastes marinus*, CN code 03028931) from Iceland reached 2,16 EUR/kg in **week 45**, up by 22% from the previous week. This price is notable for being fairly stable except for a few extraordinary peaks. Ignoring the peaks, the average price in the past three years was 1,74 EUR/kg, and there has been a recent rise from a long stable period. The peaks are associated with seasonal (winter) periods of nearly zero volumes. The previous years show patterns with peaks that are much smaller in magnitude but with the same correlation, all showing that redfish prices are, like other groundfish, influenced by seasonality.

Figure 40. **IMPORT PRICE OF FRESH WHOLE REDFISH FROM ICELAND**



Source: European Commission (updated 16.11.2018).

3 Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In August 2018, consumption of fresh fisheries and aquaculture products increased in both volume and value in Ireland, Italy, Poland, and the UK compared with August 2017. The highest increases were registered in the UK: +26% in volume and +32% in value. In the Netherlands, value increased by 4%, while volume declined by 7%. In the rest of the Member States surveyed, consumption decreased in both volume and value. The largest drop occurred in Sweden, −24% in volume and −29% in value.

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

Country	Per capita consumption 2016* (live weight equivalent) kg/capita/year	August 2016		August 2017		July 2018		August 2018		Change from August 2017 to August 2018	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	24,7	632	9,34	597	8,78	608	9,72	539	7,85	10%	11%
Germany	13,9	4.117	62,19	5.243	77,48	4.797	72,57	4.551	70,72	13%	9%
France	32,9	16.804	174,48	17.189	178,48	14.237	159,65	16.512	174,27	4%	2%
Hungary	5,2	338	1,55	317	1,60	206	1,05	261	1,53	18%	4%
Ireland	23,0	982	13,70	870	12,74	1.021	15,20	982	14,68	13%	15%
Italy	31,1	26.328	216,17	27.148	226,69	21.722	178,49	28.913	249,74	7%	10%
Netherlands	21,0	2.533	32,97	2.782	35,01	2.238	34,54	2.596	36,42	7%	4%
Poland	14,5	3.262	18,37	2.664	15,84	2.757	16,68	2.817	17,41	6%	10%
Portugal	57,0	5.599	34,37	5.521	36,19	4.163	25,90	4.834	31,37	12%	13%
Spain	45,7	46.931	340,59	45.439	342,84	49.049	366,03	42.322	322,23	7%	6%
Sweden	26,4	780	12,44	968	15,91	577	8,87	734	11,32	24%	29%
UK	23,7	21.652	225,94	22.036	221,10	22.346	241,95	27.844	291,86	26%	32%

Source: EUMOFA, based on Europanel (updated 13.11.2018).
**Data on per capita consumption of all fish and seafood products for all EU Member States can be found at:*
http://eumofa.eu/documents/20178/132648/EN_The+EU+fish+market+2018.pdf

In the month of August for the past three years, household consumption of fresh fish products has been above the annual average in both volume and value in Portugal (+6% and +10%, respectively) and Sweden (+4% and +24%). In the Netherlands, household consumption in August was above the average in volume; however, value was 2% below the average. In the rest of the Member States surveyed, both volume and value were below the annual average.

3.2. Fresh anchovy

Habitat: a small pelagic species, inhabiting coastal marine waters in large schools[13].
Catch area: Northeast Atlantic from the south of Norway through the English Channel, in the area around the UK and Ireland, the Bay of Biscay, Mediterranean and Black seas[14].
Main producing countries in Europe: Italy, Spain, France.
Production method: caught.
Main consumers in the EU: Italy, Spain.
Presentation: whole.
Preservation: fresh, frozen, smoked, salted, marinated, canned.

3.2.1 General overview of household consumption in Italy

Italy is among the EU countries with the highest per capita consumption of fisheries and aquaculture products. In 2016, Italy registered per capita consumption of 31,1 kg, 28% higher than the EU average of 24,3 kg. However, Italy's consumption was still 45% lower than the per capita consumption in Portugal of 57 kg, which was the highest in the EU. The per capita consumption of fisheries and aquaculture products in Italy increased by 4% in 2016 compared with the previous year. See more on per capita consumption in the EU in table 3.

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

First sales: France (8/2017), Greece (8/2017, 7/2016, 2/2015, January 2013), Italy (8/2017).

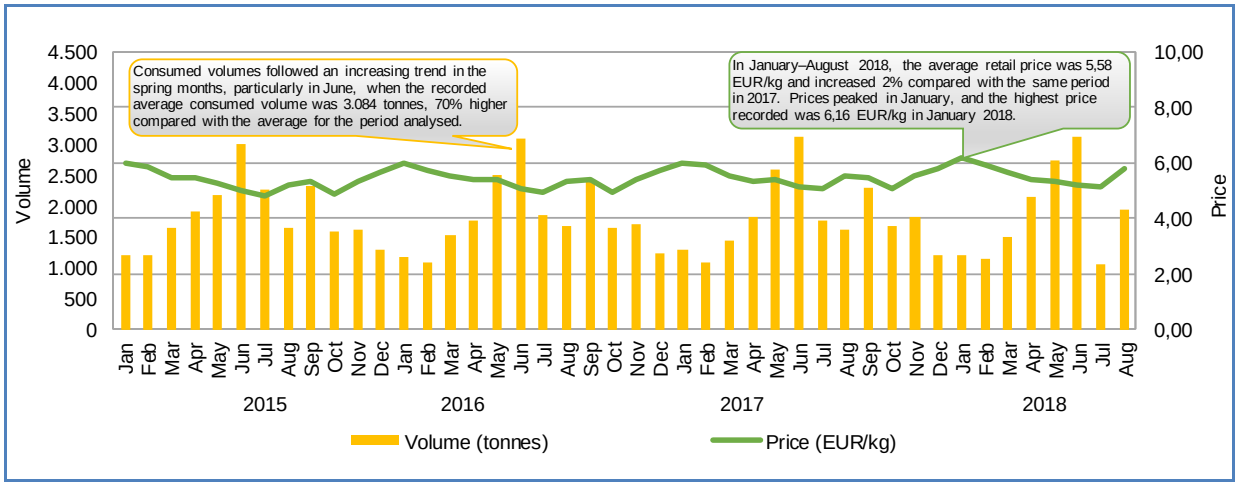
Consumption: Greece (5/2016, 8/2015, 6/2014), Italy (5/2016, 8/2015, 6/2014), Spain (5/2016, 8/2015, 6/2014).

3.2.2 Consumption trend in Italy

Long-term trend, January 2015–August 2018: increasing in volume and in price.
Yearly average price: 5,35 EUR/kg (2015), 5,39 EUR/kg (2016), 5,48 EUR/kg (2017).
Total yearly consumption: 21.809 tonnes (2015), 21.656 tonnes (2016), 21.737 tonnes (2017).
Short-term trend, January–August 2018: increasing in volume and in price.
Average price: 5,58 EUR/kg.
Total consumption, January–August 2018: 14.813 tonnes.

[13] http://eumofa.eu/documents/20178/106790/MH+8+2017+EN.pdf
[14] http://www.fao.org/fishery/species/2106/en

Figure 41. **RETAIL PRICE AND VOLUME SOLD OF FRESH ANCHOVY IN ITALY**



Source: EUMOFA, based on Europanel (updated 13.11.2018).

4 Case study – The Japanese market for fisheries and aquaculture products

Map of Japan.
Source:http://www.freeworldmaps.net/asia/japan/japan-map-physical.jpg

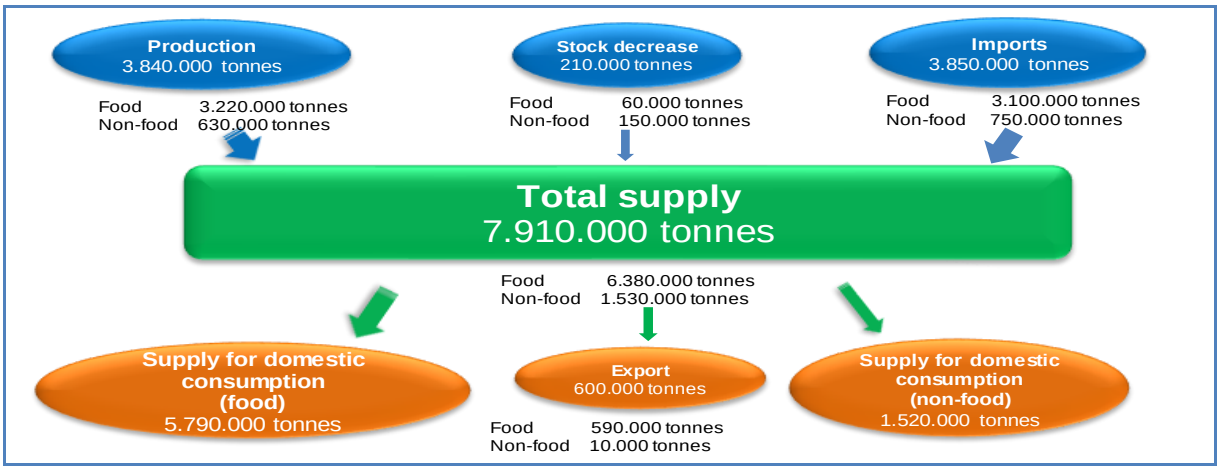
The Japanese market for fisheries and aquaculture products has significantly decreased in the last 20 years but remains one of the world's leading markets, exceeded only by China and the EU.

The Japanese market supplemented it consumption demand by imports (44% of total value) and had a trade deficit close to EUR 12 billion in 2017. The EU has a positive balance with Japan, with a surplus of EUR 247 million, mainly generated by tuna.

4.1. Market supply

Japan is the largest fish-consuming nation in the world after China. In 2016, the supply of fisheries and aquaculture products in Japan was estimated at 7,3 million tonnes fresh fish equivalent, of which 5,79 million tonnes (79%) were for human consumption (food) and 1,52 million tonnes (21%) for feed and fertilizers (non-food). The self-sufficiency rate of fisheries and aquaculture products for 2016 was 56%, a decrease of 3 points from the previous year.

Figure 42. **SUPPLY BALANCE OF FISHERIES AND AQUACULTURE PRODUCTS IN 2016**



Source: Food balance sheet (Ministry of Agriculture, Forestry and Fisheries, Japan).

4.2. Consumption

Japan's per capita consumption is still at a high level but has significantly declined since 2000 and is at the same level as 50 years ago. The apparent per capita consumption of fisheries and aquaculture products is 45,6 kg (fresh fish equivalent), or 24,6 kg net, in 2016.

In the last 25 years, fish consumption experienced a clear downward trend (from 38 kg net in 1989 to 24,6 kg net in 2016), while meat consumption recorded an upward trend, from 25,8 kg in 1989 to 31,6 kg in 2016. Until 2010, fish consumption exceeded meat consumption, but since 2011 meat is the primary source of animal proteins in the Japanese diet.

The consumption of fisheries and aquaculture products is higher among consumers above 50 years of age, but they too are consuming less fish. The decline in the consumption of fisheries and aquaculture products is especially significant among younger Japanese people aged under 40 years, who furthermore prefer processed food while older generations (60 years and above) buy three times more fresh fish than those aged below 40 years. The annual expenditure per household on fresh fish has been flat in recent years. A survey commissioned by the Ministry of Agriculture suggests that challenges in prices and convenience may result in decreases in consumption, while health benefits and taste are highly valued.

4.3. Trends in Japanese production

Table 4. **JAPANESE FISHERIES AND AQUACULTURE PRODUCTION IN 2016 (volume in 1000 tonnes)**

Fisheries	Distant water	334
	Offshore	1.936
	Coastal	994
	Inland water	28
	Total fisheries	3.292
Aquaculture	Marine	1.033
	Inland water	35
	Total aquaculture	1.068
Total		**4.360**

Source: Ministry of Agriculture, Forestry and Fisheries, Japan.

The results of the 2017 stock assessment in the waters around Japan (for 84 stocks of 50 species) show that resource levels are high for 14 stocks, moderate for 31 stocks, and low for 39 stocks.
Domestic fisheries and aquaculture production was 4,36 million tonnes in 2016, a drop of 270.000 tonnes from the previous year. Marine fisheries production decreased by 230.000 tonnes to 3,29 million tonnes. Japan has the world's third largest distant water fishing fleet (mainly long line vessels) and catches by this fleet account for 10% of the fisheries production. Catches of salmon and Japanese squid, among others, decreased while Japanese sardine increased. Marine aquaculture decreased by 40.000 tonnes to 1,03 million tonnes. Inland water fisheries and aquaculture production decreased by 6.000 tonnes to 63.000 tonnes.

The value of fisheries and aquaculture production was JPY 1.586 billion (EUR 13 billion) in 2016, which was about the same as in the previous year. The value of marine fisheries decreased by JPY 33,6 billion (EUR 280 million) to JPY 962,1 billion, (EUR 8,0 billion) that of marine aquaculture increased by JPY 23,1 billion (EUR 192 million) to JPY 509,7 billion (EUR 4,2 billion), and that of inland water fisheries and aquaculture increased by JPY 10,2 billion (EUR 85 million) to JPY 113,8 billion (EUR 947 million). The main species caught by the Japanese fleet are small pelagics (chub mackerel, jack mackerel, pilchard, anchovy, saury).

Table 5. **JAPANESE CATCHES BY MAIN SPECIES (volume in tonnes)**

Species	ERS code	2010	2011	2012	2013	2014	2015	2016
Pacific chub mackerel	MAS	491.813	392.506	438.269	374.954	485.717	557.285	489.100
Japanese pilchard	JAP	70.159	175.781	135.236	215.004	195.726	340.119	374.600
Yesso scallop	JSC	327.087	302.990	315.387	347.541	358.982	233.885	213.700
Skipjack tuna	SKJ	317.264	257.879	263.410	270.054	232.798	224.047	202.006
Japanese anchovy	JAN	350.683	261.594	244.738	247.427	248.069	168.745	172.700
Alaska pollock	ALK	251.166	238.920	229.823	229.577	194.920	180.349	134.000
Japanese jack mackerel	JJM	159.440	168.417	134.014	150.884	145.767	151.706	128.700
Chum(=keta) salmon	CHU	174.216	144.044	139.438	170.457	153.912	141.330	122.774
Pacific saury	SAP	207.488	215.353	221.470	149.853	228.647	116.243	113.900
Amberjacks	AMX	106.890	110.917	101.842	117.175	125.223	123.177	104.800
Other		1.730.160	1.607.964	1.536.783	1.460.746	1.362.500	1.311.207	1.216.967
Total		**4.188.376**	**3.878.376**	**3.762.422**	**3.735.685**	**3.734.275**	**3.550.108**	**3.275.263**

Source: FAO–Fishstat.

The huge tsunami following the March 2011 earthquake damaged more than 300 fishing ports in seven prefectures, including Iwate, Miyagi and Fukushima and in the latter three prefectures about 90% of the 29.000 fishing boats were made unusable. Catches in these three prefectures accounted for 10% of Japan's catch.

The aquaculture industries in the region were also severely damaged, particularly in Iwate and Miyagi prefectures, where production of oysters and wakame seaweed is widespread. In these prefectures, the tsunami devastated sea squirt and salmon farms which accounted for 95% of their respective markets in Japan. By 2016 aquaculture production in the region was back to pre-tsunami levels.
The main species farmed by Japanese aquaculture are algae, scallops, oysters and amberjacks.

Table 6. **JAPANESE AQUACULTURE PRODUCTION BY MAIN SPECIES (volume in tonnes)**

Species	ERS code	2010	2011	2012	2013	2014	2015	2016
Laver (nori)	PRT	328.700	292.345	341.580	316.228	276.129	297.370	300.683
Yesso scallop	JSC	219.649	118.425	184.287	167.844	184.588	248.209	214.571
Pacific cupped oyster	OYG	200.298	165.910	161.116	164.139	183.685	164.380	158.925
Japanese amberjack	AMJ	138.936	146.240	160.215	150.387	134.608	140.292	140.868
Silver seabream	GSU	67.607	61.186	56.653	56.651	61.702	63.605	66.965
Wakame	UDP	52.393	18.751	48.343	50.614	44.716	48.951	47.672
Japanese kelp	LNJ	43.251	25.095	34.147	35.410	32.987	38.671	27.068
Japanese eel	ELJ	20.543	22.006	17.377	14.204	17.627	20.119	18.907
Sea squirts	SSX	10.272	693	610	889	5.344	8.288	18.271
Pacific Bluefin tuna	PBF	-	-	9.639	10.396	14.713	14.825	13.413
Coho salmon	COH	14.766	116	9.728	12.215	12.802	13.937	13.208
Other		54.686	57.205	50.126	48.764	53.038	47.005	47.443
Total		**1.151.101**	**907.972**	**1.073.821**	**1.027.951**	**1.021.849**	**1.105.652**	**1.067.994**

Source: FAO–Fishstat.

Due to high domestic demand, Japan has put huge research efforts in technology and knowledge on extensive bluefin tuna farming for becoming the leading producer. From zero in 2010–2011, production of farmed bluefin tuna grew to 13.000 tonnes in 2016, i.e. approximately 25% of the domestic market.

4.4. Distribution and processing

Food service is the main distribution channel, accounting for 48% of the distribution of fresh fisheries and aquaculture products in Japan, followed by the retail channel (34%) and institutional catering (18%). Imported products, such as salmon, tuna and mackerel are in heavy demand in the food service sector[15].

Wholesale markets play a critical role in the effective distribution of fisheries and aquaculture products. However, first-sale markets in landing areas are in a weak position in terms of price formation; from 2008 to 2015 their number decreased from 333 to 317, while the number of wholesale markets in consuming areas decreased from 287 to 257. According to the Ministry of Agriculture, the process of consolidation should be continued. An increasing share of the seafood consumed in Japan is distributed outside wholesale markets. This is especially true for imported seafood, which constitutes a large share of Japanese seafood consumption.

Production of the processed fish and seafood decreased by 50.000 tonnes to reach 1,63 million tonnes in 2016. Almost all fish processing companies are small- and medium-sized companies with less than 300 employees. The major challenges for the processing industry are to secure both raw material supply and labour.

The main manufactured products are surimi products, dried and salted fish, cured fish, baked laver and frozen products.

[15] "Fish products in Japan" (Agriculture and Agri-Food Canada, 2017).

4.5. Trade

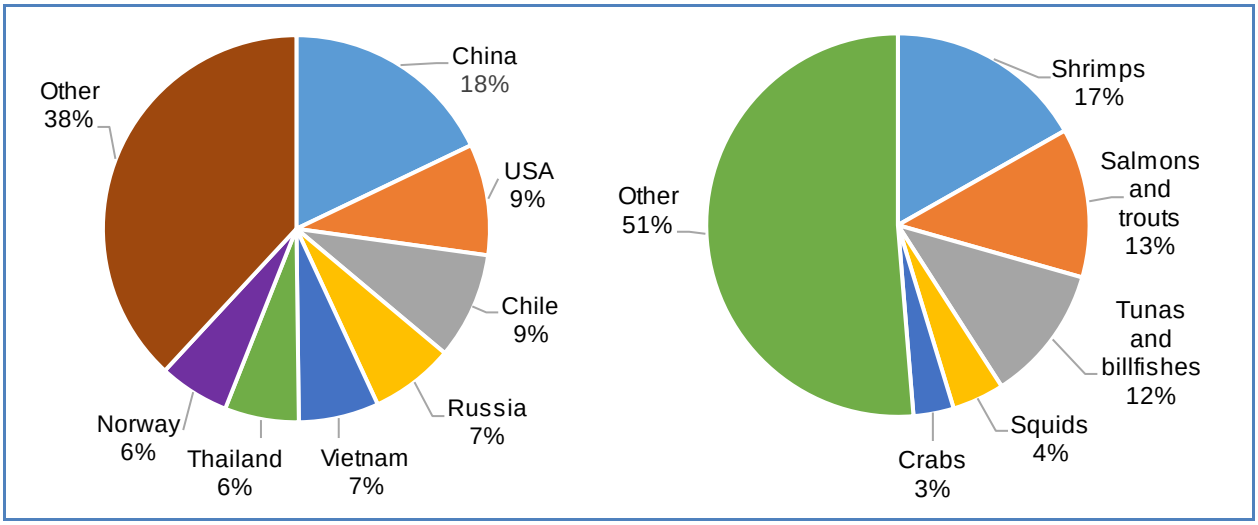
Japanese trade in fisheries and aquaculture products

In 2017, Japan recorded a trade deficit in fisheries and aquaculture products of JPY 1.500 billion (EUR 11,8 billion)[16].

Imports

In 2017, the import volume of fisheries and aquaculture products increased by 4% over 2016 (on a product weight basis) to 2,48 million tonnes and the import value increased by 11% to JPY 1.775 billion (EUR 14,0 billion)[17]. In a long-term perspective, the import volume has been decreasing. Major import partners are China, the US, Chile and Russia (in terms of value). Major imported products are shrimps, salmons and trouts, tunas and billfishes (in terms of value).

Figure 43. **JAPANESE IMPORT VALUE OF FISHERIES AND AQUACULTURE PRODUCTS BY MAJOR SUPPLIERS (LEFT) AND MAJOR SPECIES (RIGHT) IN 2017**



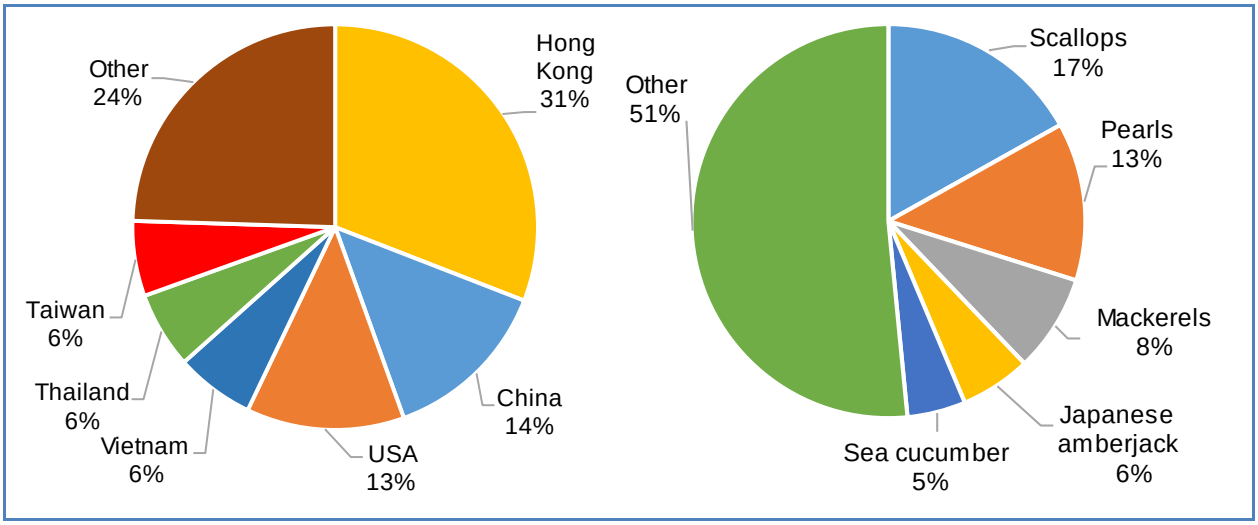
Source: Fisheries Agency/Foreign Trade statistics, Japan.

Exports

In 2017, the export volume of fisheries and aquaculture products increased by 11% over 2016 to 600.000 tonnes and the export value increased by 4% to JPY 274,9 billion (EUR 2,2 billion). In a long-term perspective, export volume has been on an increasing trend.
Major export partners in terms of value are Hong Kong, China and the US. Major exported items are scallops, pearls and mackerels.

[16] In comparison, the EU-28 trade deficit amounted to EUR 20,2 billion in 2017.
[17] European Central Bank exchange rates: 1 EUR = 120,197 JPY (2016); 1 EUR = 126,711 JPY (2017)

Figure 44. **JAPANESE EXPORT VALUE OF FISHERIES AND AQUACULTURE PRODUCTS BY MAJOR DESTINATIONS (LEFT) AND MAJOR SPECIES (RIGHT) IN 2017**



Source: Fisheries Agency/Foreign Trade statistics, Japan.

Japan's export strategy

The "Strategy to Improve Export Performance in Agriculture, Forestry and Fisheries" was compiled in May 2016 by the Ministry of Agriculture. According to the strategy, the Japanese government intends to improve the supply chain for fisheries and aquaculture products with the aim of expanding exports. The strategy also plans to improve the export environment (market intelligence, financing instruments, promotion) in order to better address the expansion of overseas markets and to ensure compliance with the health standards of export markets targeted.

With regard to agricultural, forestry and fisheries products, the "Economic Policy to Attain Investment for the Future" compiled in August 2016 sets an export target of JPY 1 trillion (including JPY 350 billion or EUR 2,8 billion for fisheries and aquaculture products) by 2019.

Japan and the EU

The EU has a positive trade balance in fisheries and aquaculture products with Japan, with a surplus of EUR 247 million in 2017.

EU imports of Japanese fisheries and aquaculture products totaled EUR 66 million and 6.000 tonnes in 2017. In value terms, scallop, "other non-food use" products and fish oil accounted for 39%, 20%, and 13%, respectively, of total EU imports from Japan.

Table 7. **MAIN COMMERCIAL SPECIES (MCS) IMPORTED FROM JAPAN BY THE EU (value in 1000 EUR and volume in tonnes)**

	2015		2016		2017	
MCS	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**
Scallop	16.856	925	26.049	1.070	25.852	1.083
Other non-food use	10.801	499	12.112	331	12.892	353
Fish oil	4.891	271	5.472	370	8.657	637
Other	15.620	3.294	18.209	4.054	18.505	3.898
Total	**48.168**	**4.989**	**61.842**	**5.825**	**65.906**	**5.971**

Source: EUMOFA.

The main EU destination for Japanese exports were the Netherlands, which also acted as a gateway to other EU Member States (63% of total EU import value), followed by the UK (8%), Germany (8%) and France (7%).

EU exports to Japan totaled EUR 313 million and nearly 58.000 tonnes in 2017. Tuna (mostly bluefin tuna shipped by Malta, Croatia and Spain) represented 45% of total value. The other major products exported to Japan are "other

marine fish" (cobia, seabass) and caviar, which accounted for 9% and 5%, respectively, of total export value. In volume, small pelagics (mostly horse mackerel and mackerel) accounted for 18.500 tonnes in 2017, i.e. 32% of total volume exported to Japan but less than 9% of total value.

Table 8. **MAIN COMMERCIAL SPECIES (MCS) EXPORTED TO JAPAN BY THE EU (value in 1000 euros and volume in tonnes)**

	2015		2016		2017	
MCS	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**
Bluefin tuna	113.703	8.374	144.324	11.543	101.331	8.315
Tuna, miscellaneous	36.084	2.289	35.892	2.293	40.748	2.610
Other marine fish	2.606	506	3.481	392	28.342	2.574
Caviar	18.636	1.608	17.347	1.544	16.152	1.128
Other	124.048	42.211	135.401	37.429	126.735	42.928
Total	**295.077**	**54.988**	**336.445**	**53.201**	**313.308**	**57.555**

Source: EUMOFA.

The main EU countries exporting to Japan were Malta (24% of total value), Spain (22%), Denmark (12%) and Croatia (10%).

On 17 July 2018 the European Union and Japan signed an Economic Partnership Agreement (EPA). This agreement will see Japan eliminating duties on most agricultural products and make them more affordable to Japanese consumers. For most fishery and aquaculture products duties will be gradually eliminated in 9 years. But for some products (usually with a base rate of 10%), where Japan has a significant fishing or farming activity, duties will be eliminated over a period of 16 years. This is the case for mostly small pelagics, Alaska pollock, hake and scallop.

5 Case study – Fisheries and aquaculture of clam

5.1. Introduction

Clam is a common name for several kinds of bivalve molluscs. The word is often applied only to those that are edible and live as infauna, spending most of their lives partially buried in the sand of the ocean floor. Clams have two shells of equal size connected by two adductor muscles and have a powerful burrowing foot. Clams in the culinary sense do not live attached to a substrate (whereas oysters and mussels do) and do not live near the bottom (whereas scallops do). Many edible clams are oval or triangular; however, razor clams have an elongated parallel-sided shell, suggesting an old-fashioned straight razor.

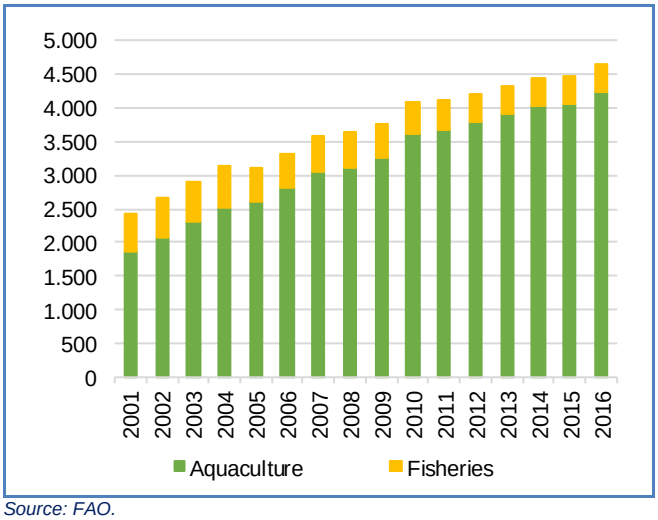
Globally, there are many species commonly or locally defined as clams. This study focuses on the species which are commonly regarded as clams in the main EU consuming countries: "almejas" in Spain, "palourdes" in France and "vongole" in Italy.

The main species sold under these designations are grooved carpet shell (*Ruditapes decussatus*), Pullet carpet shell (*Venerupis pullastra*) and Japanese carpet shell (*Ruditapes philippinarum*).

5.2. Production

Global Production

Figure 45. **GLOBAL PRODUCTION OF ALMEJA CLAMS (volume in 1000 tonnes)**



Source: FAO.

Clams are available from both fisheries and aquaculture. During the past 15 years, global supply of clams (from both fisheries and aquaculture) has increased from 3,9 million tonnes to 6,2 million tonnes (in 2016). Of the total, 5,6 million tonnes come from Asia followed by the Americas with 0,4 million tonnes[18].

When limiting the scope to species of clams which fall under the designation almejas, global supply has also increased steadily, from around 3,5 million tonnes in 2007 to 4,65 million tonnes in 2016. Of the total, 91% is produced in Asia, with China as the by far biggest producer. In 2nd place follows the Americas with a production share of 7%, while Europe ranks next with 1% of total production.

The dominant clam species is Japanese carpet shell (*Ruditapes philippinarum*). Approximately 91% of the global production of "almejas" consisted of Japanese carpet shells in 2016.

[18] FAO.

Production in the EU

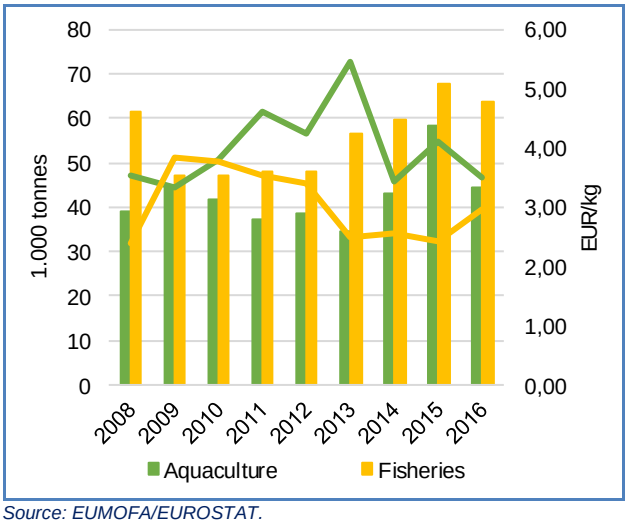
Along the Atlantic coast the main species found include the European clam or (crosscut) carpet-shell clam (*Ruditapes decussatus*), the pullet carpet-shell clam (*Venerupis pullastra*) and the introduced Japanese clam (*Tapes philippinarum*). On the Mediterranean coast, the striped venus clam (*Chamelea gallina*) fisheries are of relevant socio-economic importance, particularly in the Adriatic Sea[19].

Over the last nine years, EU production of clams from fisheries has been considerably higher than that from aquaculture. From a total production of 100.000 tonnes in 2008, production fell to 85.000 tonnes in 2011. Production from both fisheries and aquaculture peaked at 126.000 tonnes for a value of EUR 403 million in 2015. Production then fell to 108.000 tonnes valued at EUR 319 million in 2016.

Of the 44.400 tonnes of clams from aquaculture in 2016, 82% was farmed in Italy. The main clams farmed in Italy is Manila clam (Ruditapes philippinarum). Other clam farming Member States are France, Spain, and Portugal, all with production in 2016 ranging between 2.000 and 3.000 tonnes.

As with aquaculture, Italy is the main producer of clams from fisheries. Of the 64.000 tonnes landed in 2016 at EU level, 28% was landed in Italy. Spain accounted for 16% of the landings and France for 13%.

Figure 46. **PRODUCTION OF CLAMS IN THE EU (volume in 1000 tonnes, price in EUR/kg)**



Source: EUMOFA/EUROSTAT.

Since 2011, the unit value for clams from aquaculture has been higher than for clams from fisheries. Unit value for clams from fisheries trended down in the period, from 3,77 EUR/kg in 2010 to 2,41 EUR/kg in 2015. Unit value for farmed clams peaked in 2013, at 5,44 EUR/kg, as production volume fell to the lowest level since 2003. In 2016 the unit value gap narrowed as clams from aquaculture and fisheries moved in the opposite direction.

5.3. Trade

Extra-EU Imports

In 2013 imports of fresh and frozen clams (including cockles and ark shells) to the EU amounted to around 15.000 tonnes, of which two-third was of Vietnamese origin. Since then, significant changes have taken place in terms of both import volume and main suppliers. In the following three years import volumes trended down, but from 2016 to 2017 imports rose by 30%. In 2017, imports of fresh and frozen clams (mainly frozen) to the EU totalled 3.951 tonnes in volume worth EUR 12,1 million. It is assumed that most of the fresh product imported to the EU consist of clams. This is due to the fact that most of the fresh products are imported from Tunisia and the country is one of the few suppliers of the native clam species (*Tapes decussatus*) which is highly demanded on the Italian market.

[19] DIRECTORATE-GENERAL FOR INTERNAL POLICIES, POLICY DEPARTMENT B: STRUCTURAL AND COHESION POLICIES - FISHERIES RESEARCH FOR PECH COMMITTEE - THE CLAM FISHERIES SECTOR IN THE EU - THE ADRIATIC SEA CASE, JAN 2016

Table 9. **EXTRA-EU IMPORTS OF FRESH, FROZEN AND PREPARED/PRESERVED CLAMS, COCKLES AND ARK SHELLS BY MEMBER STATE (volume in tonnes, value in 1000 EUR)**

	2015		2016		2017		2018 (Jan-May)	
Product	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Prepared/preserved	22.558	50.135	29.491	53.995	35.212	67.909	13.244	24.688
Frozen	5.535	8.394	2.162	3.996	3.448	8.577	1.072	2.203
Fresh	1.113	4.215	886	4.988	504	3.478	132	1.563
Total	**29.207**	**62.744**	**32.538**	**62.979**	**39.164**	**79.964**	**14.448**	**28.454**

Source: EUMOFA.

Table 10. **EXTRA-EU IMPORTS OF FRESH AND FROZEN CLAMS, COCKLES AND ARK SHELLS BY MEMBER STATE (volume in tonnes, value in 1000 EUR)**

	2015		2016		2017		2018 (Jan-May)	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Spain	2.091	2.793	1.870	3.562	3.046	7.306	891	1.620
Italy	1.532	4.289	1.056	4.647	609	3.060	184	1.461
Portugal	2.545	3.660	6	59	123	562	79	172
France	2	132	2	130	14	339	15	227
Netherlands	415	1.394	31	128	92	276	12	69
United Kingdom	39	157	60	229	51	230	10	46
Other	25	184	24	230	17	282	14	172
Total	**6.648**	**12.609**	**3.048**	**8.984**	**3.951**	**12.055**	**1.204**	**3.766**

Source: EUMOFA.

Spain is the leading importer of fresh and frozen clams (including cockles and ark shells) in the EU. In 2017, 77% of the volume imported to the EU went to Spain, 15% and 3% went to Italy and Portugal, respectively. The main supplier of fresh and frozen clams to the EU over the last two years is Chile with an import share of 55% in 2017. Chilean product was also the cheapest in 2017 with an average import price of 1,34 EUR/kg. The main supplier to the Italian market is Tunisia and most of the imports consist of fresh product with an average import price of 8,94 EUR/kg in 2017.

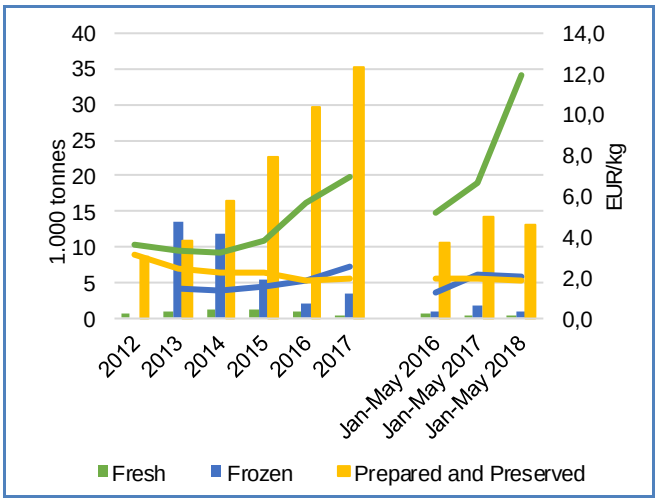
EU imports of prepared/preserved product have over the last few years shown an increasing trend, both in terms of volume and value – with volume increasing the most. From 2015 to 2017 import volume rose by 56% while value rose by 35%.

Table 11. **EXTRA-EU IMPORTS OF PREPARED/PRESERVED CLAMS, COCKLES AND ARK SHELLS BY MEMBER STATE (volume in tonnes, value in 1000 EUR)**

	2015		2016		2017		2018 (Jan-May)	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Spain	8.151	19.178	10.503	19.171	11.134	20.904	4.875	8.782
Portugal	6.823	10.073	10.567	14.268	11.499	16.662	3.986	4.991
Italy	6.445	17.775	7.174	17.038	10.761	25.511	3.843	9.324
Netherlands	313	804	512	1.178	1.013	2.564	263	961
UK	439	806	313	705	279	609	107	218
Belgium	168	413	165	318	185	514	54	112
Other	219	1.086	257	1.318	342	1.144	115	299
Total	**22.558**	**50.135**	**29.491**	**53.995**	**35.212**	**67.909**	**13.244**	**24.688**

Source: EUMOFA.

Figure 47. **EXTRA-EU IMPORTS OF CLAM, COCKLES AND ARK SHELLS BY PRESERVATION (volume in 1000 tonnes, price in EUR/kg)**



Source: EUMOFA.

While a declining import trend is observed for fresh and frozen clams (including cockles and ark shells) since 2013, imports of prepared/preserved products have increased steeply. Regarding unit value (EUR/kg), the trend has been the opposite. Import prices have fallen from approximately 2,50 EUR/kg in 2013 to just below 2,00 EUR/kg in 2017. In the first five months of 2018, import prices for fresh clams have shown a steep rise on very limited volumes (132 tonnes).

Extra-EU Exports

Exports of clams to markets outside the EU are far lower than imports. Exports of fresh/frozen clams have from 2015 to 2017 increased from 297 tonnes to 816 tonnes. Spain, Portugal, and Italy were the main exporters of fresh/frozen clams in 2017.

Exports of prepared/preserved clams trended in the opposite direction, falling from 901 tonnes in 2015 to 351 tonnes in 2017. The main exporters were the same as for fresh/frozen clams.

Table 12. **EXTRA-EU EXPORTS OF FRESH, FROZEN AND PREPARED/PRESERVED CLAMS, COCKLES AND ARK SHELLS (volume in tonnes, value in 1000 EUR)**

	2015		2016		2017		2018 (Jan-May)	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Prepared/preserved	901	8.353	821	6.436	351	2.478	163	723
Fresh	53	280	122	1.355	362	3.964	132	1.449
Frozen	244	629	259	666	455	2.053	118	334
Total	**1.198**	**9.262**	**1.202**	**8.458**	**1.167**	**8.495**	**413**	**2.506**

Source: EUMOFA.

Intra-EU Exports

While imports to the EU are dominated by prepared/preserved and frozen clams, the trade between member states is dominated by fresh/live clams. Over the last three years around 70% of internal trade of clams was fresh/live clams.

Italy is the biggest exporter of fresh/frozen clams (including cockles and ark shells) to the EU market. The country is also the main importer of fresh and frozen clams from other member states (with exports 1.100 tonnes higher than imports in 2017). Portugal was the 2nd biggest exporter of fresh/frozen and prepared/preserved clams in 2017. Most of the exports are from own production which amounted to 7.136 tonnes (from aquaculture and catches combined).

The Netherlands is the main intra EU exporter of prepared/preserved clams, cockles and ark shells and the 3rd largest exporter of fresh/frozen products (mainly frozen). It is assumed that the majority of the exports of prepared/preserved product consist of cockles.

Table 13. **INTRA-EU EXPORTS OF FRESH, FROZEN AND PREPARED/PRESERVED CLAMS, COCKLES AND ARK SHELLS (volume in tonnes, value in 1000 EUR)**

	2015		2016		2017		2018 (Jan-May)	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Fresh	28.885	91.326	28.666	107.337	32.146	120.621	9.215	42.204
Prepared/preserved	9.170	56.069	10.442	65.075	11.109	57.031	3.869	17.021
Frozen	2.083	7.357	1.426	6.732	4.963	25.018	1.780	12.753
Total	**40.137**	**154.752**	**40.534**	**179.145**	**48.218**	**202.670**	**14.863**	**71.979**

Source: EUMOFA.

Table 14. **INTRA-EU EXPORTS OF FRESH AND FROZEN PRESERVED CLAMS, COCKLES AND ARK SHELLS BY MEMBER STATE (volume in tonnes, value in 1000 EUR)**

	2015		2016		2017		2018 (Jan-May)	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Italy	7.554	34.969	7.892	44.223	9.930	52.364	3.823	21.292
Netherlands	5.445	18.726	3.755	15.504	5.711	25.984	1.979	8.844
Portugal	7.925	18.774	5.975	17.749	6.498	18.967	1.901	6.848
Spain	1.302	4.888	1.540	7.142	2.676	12.700	1.170	9.262
France	2.830	10.073	3.376	11.755	4.489	16.565	794	4.246
Greece	971	957	2.313	1.935	2.877	2.031	438	630
Other	4.941	10.295	5.242	15.762	4.928	17.028	891	3.836
Total	**30.967**	**98.683**	**30.092**	**114.069**	**37.108**	**145.639**	**10.995**	**54.958**

Source: EUMOFA.

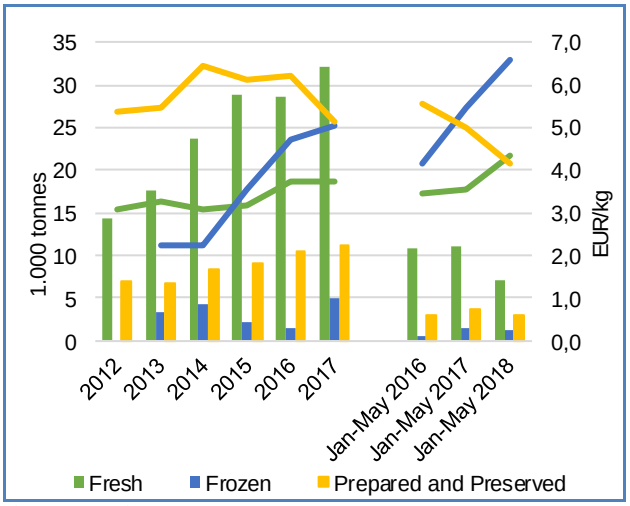
Table 15. **INTRA-EU EXPORTS OF PREPARED/PRESERVED CLAMS BY MEMBER STATE (volume in tonnes, value in 1000 EUR)**

	2015		2016		2017		2018 (Jan-May)	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Netherlands	3.624	32.513	3.268	32.517	3.637	28.697	1.232	9.255
Portugal	1.940	3.442	1.801	3.242	2.319	4.517	1.168	2.112
Italy	514	2.763	956	4.219	1.135	4.935	467	2.209
Spain	705	2.336	1.253	3.379	1.235	3.855	435	1.373
United Kingdom	1.528	10.869	2.305	17.555	1.712	12.281	197	1.203
Bulgaria	10	24	4	12	569	942	144	56
Other	850	4.123	855	4.151	502	1.803	224	812
Total	**9.170**	**56.069**	**10.442**	**65.075**	**11.109**	**57.031**	**3.869**	**17.021**

Source: EUMOFA.

Intra-EU export prices for fresh/frozen clams have shown a steady increase from 2014 despite increased trade volumes. From 2016 to 2017 exports rose by 23% and the average export price rose by 3%. In the first 5 months of 2018 the average export price for fresh/frozen clams rose by 24%.

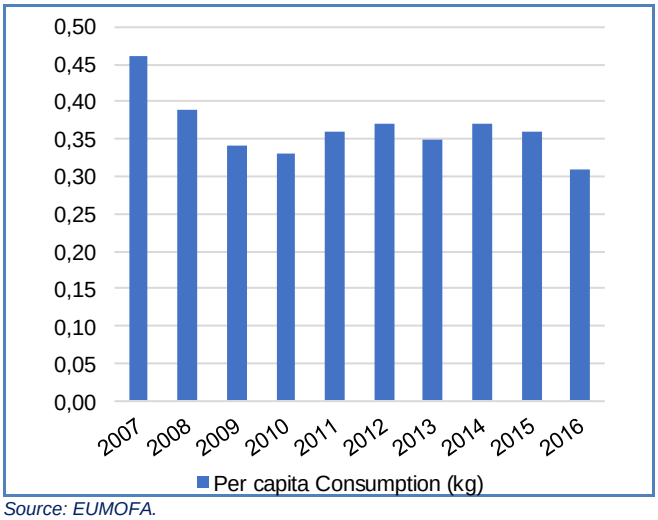
Figure 48. **INTRA-EU EXPORTS OF CLAMS, COCKLES AND ARK SHELLS BY PRESERVATION (volume in 1000 tonnes, price in EUR/kg)**



Source: EUMOFA.

5.4. Consumption

Figure 49. **EU CONSUMPTION OF CLAMS, COCKLES AND ARK SHELLS (kg per capita)**



Source: EUMOFA.

Most clams produced in the EU are sold live/fresh, in the form of graded, whole-shelled products, either loose or in mesh bags. They are either eaten raw as a starter or, more usually, as an ingredient in cooked dishes, particularly in Italian cuisine[20].

Apparent consumption of clams in the EU in 2016 is estimated to 156.605 tonnes which corresponds to a per capita consumption of 0,31 kg[21].

The European market for clams is essentially made up of two countries: Italy and Spain. Although no official figures are available on the export of clam species defined as almejas, it is believed that a few years ago, the Spanish market absorbed more than 50% of the national production, whereas currently it depends heavily on imports. This

[20] Fisheries and aquaculture in Europe, Magazine No 60.
[21] EUMOFA, Supply balance.

decrease is determined by two main factors: competition by a local product, mainly from the Gulf of Cadiz, and the risk of penalties and disputes due to potential presence of a product with size below the legal one[22].

Consumption of almeja clams in Spain has shown a downward trend both in terms of volume and value over the last few years[23]. Household consumption of fresh and frozen almeja clams (and cockles) fell from 32.500 tonnes in 2013 to 25.100 tonnes in 2017 (–23%). Household consumption of fresh and frozen almeja clams (and cockles) in 2017 was equal to a per capita consumption of 0,53 kg, down from 0,74 kg in 2013.

Table 16. **HOUSEHOLD CONSUMPTION OF ALMEJA CLAMS IN SPAIN 2012–2017 (volume in tonnes, value in 1000 EUR)**

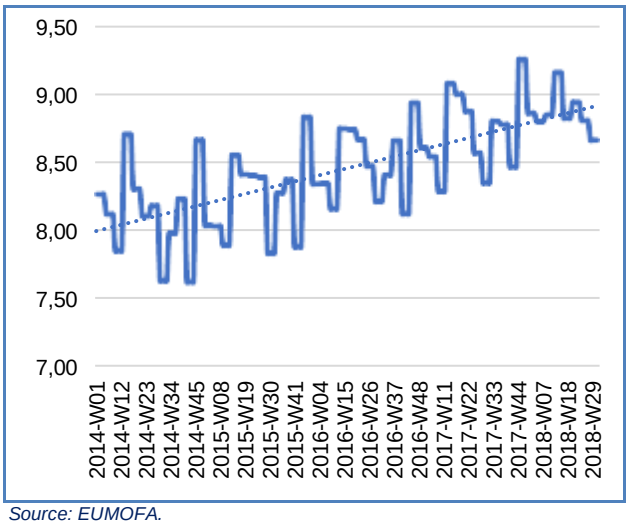
Year	Product	Volume	Value	Price EUR/kg	Consumption per capita (kg)	Expenditure per capita (EUR)
2012	Almeja clams and cockles - fresh	25.082	207.782	8,28	0,55	4,51
	Almeja clams - frozen	5.929	32.871	5,54	0,13	0,72
	Almeja clams and cockles (total)	*31.011*	*240.653*	*7,76*	*0,68*	*5,23*
	Preserved almeja clams	1.347	14.256	10,59	0,00	0,32
2013	Almeja clams and cockles - fresh	26.661	221.316	8,30	0,60	4,89
	Almeja clams - frozen	5.871	30.916	5,27	0,14	0,71
	Almeja clams and cockles (total)	*32.532*	*252.232*	*7,75*	*0,74*	*5,60*
	Preserved almeja clams	1.066	12.702	11,92	0,00	0,28
2014	Almeja clams and cockles - fresh	24.232	207.782	8,28	0,55	4,51
	Almeja clams - frozen	6.272	32.871	5,54	0,13	0,72
	Almeja clams and cockles (total)	*30.504*	*240.653*	*7,89*	*0,68*	*5,23*
	Preserved almeja clams	994	14.256	10,59	0,00	0,32
2015	Almeja clams and cockles - fresh	22.180	182.700	8,24	0,48	3,93
	Almeja clams - frozen	5.890	33.840	5,75	0,13	0,73
	Almeja clams and cockles (total)	*28.070*	*216.540*	*7,71*	*0,61*	*4,66*
	Preserved almeja clams	1.180	14.620	12,39	0,03	0,31
2016	Almeja clams and cockles - fresh	21.814	180.164	8,26	0,49	4,04
	Almeja clams - frozen	5.706	32.600	5,71	0,13	0,73
	Almeja clams and cockles (total)	*27.520*	*212.764*	*7,73*	*0,62*	*4,77*
	Preserved almeja clams	1.151	14.314	12,44	0,03	0,32
2017	Almeja clams and cockles - fresh	19.055	174.311	9,15	0,43	3,97
	Almeja clams - frozen	6.047	34.170	5,65	0,14	0,78
	Almeja clams and cockles (total)	*25.102*	*208.481*	*8,31*	*0,53*	*4,75*
	Preserved almeja clams	1.038	13.423	12,93	0,02	0,31

Source: MAPA.

[22] DIRECTORATE-GENERAL FOR INTERNAL POLICIES, POLICY DEPARTMENT B: STRUCTURAL AND COHESION POLICIES – FISHERIES RESEARCH FOR PECH COMMITTEE - THE CLAM FISHERIES SECTOR IN THE EU - THE ADRIATIC SEA CASE, JAN 2016.
[23] Ministerio de Agricultura, Alimentaciòn y Medio Ambiente; Secretaria General de Pesca; El marcado de la Almeja en España, February 2016.

While consumption has shown a downward trend, prices paid by Spanish households have in the recent years trended up. In 2015, the price paid for fresh clams averaged 8,24 EUR/kg while in 2017 the price had risen to 9,15 EUR/kg.
An upward price trend is also observed for live/fresh clams on the Italian market. While retail prices trended around 8,00 EUR/kg in the beginning of 2015, prices have exceeded 9,00 EUR/kg in periods during 2018.

Figure 50. **RETAIL PRICES FOR LIVE/FRESH CLAMS (VONGOLE) IN ITALY (price in EUR/kg)**



Source: EUMOFA.

6 Global highlights

EU / Fisheries: In November 2018, the EU, the Faroe Islands, Norway and Iceland reached an agreement on the management measures for blue whiting and Atlanto-Scandian herring for 2019. Countries agreed that, in 2019, the Total Allowable Catches will be 1.143.629 tonnes for blue whiting and 588.562 tonnes for Atlanto-Scandian herring[24].

EU / GFCM / Fisheries: At its 42nd session of the General Fisheries Commission for the Mediterranean (GFCM) adopted a set of ambitious measures, following the work of the European Commission, the Member States and the multilateral cooperation established with all riparian countries. Eleven decisions initiated by the EU were adopted. These decisions reinforce the recovery of fish stocks, as well as the fight against IUU fishing in the Mediterranean and the Black seas[25].

EU / Gambia / Fisheries: The EU and the Republic of Gambia signed a new Sustainable Fishing Partnership Agreement (SFPA) protocol which allows EU vessels to fish in Gambian waters and therefore, extends the network of tuna fisheries agreements in West Africa. The new protocol covers a period of six years and will offer EU vessels the possibility to fish 3.300 tonnes of tuna and tuna-like species as well as 750 tonnes of hake per year in Gambian waters. In return, the EU will pay the Republic of Gambia a financial contribution of EUR 550.000 annually[26].

EU / Republic of Korea / IUU: On 18th October, the EU and the Republic of Korea pledged to work closely together to fight against Illegal, Unreported and Unregulated (IUU) fishing. With the new partnership, the EU and the Republic of Korea will exchange information about suspected IUU activities; enhance global traceability of fisheries products threatened by IUU fishing through a risk-based, electronic catch documentation and certification system; join forces in supporting developing states in the fight against IUU fishing and the promotion of sustainable fishing through education; and strengthen cooperation in international fora, including regional fisheries management organisations[27].

EU / Cape Verde / Fisheries: In October, the EU and Cape Verde agreed to renew the current Sustainable Fishing Partnership Agreement (SFPA) protocol, which expires at the end of the year. This fisheries agreement allows EU vessels from Spain, Portugal and France to fish in Cape Verdean waters and is part of the tuna network fisheries agreements in West Africa. The new agreement covers a period of 5 years and will offer EU vessels the possibility to fish 8.000 tonnes of tuna and tuna-like species in Cape Verdean waters. In return, the EU will pay Cape Verde a financial contribution of EUR 750.000 annually[28].

FAO / Small pelagics / Supply: In 2017, supplies of frozen mackerel to the EU market increased slightly to 150.000 tonnes over 2016. Germany, the major European market for herring, increased herring imports to 24.100 tonnes (+9% over 2017) during the first three months of 2018, mainly supplied by Poland (41%), Denmark (28%), and Norway (17%)[29].

Russia / Seafood / Consumption: A survey on Russian seafood consumption has outlined the challenges facing suppliers of the domestic market. In 2018, seafood consumption in Russia is around 10,3 kg/capita annually, what is less than in 2013, when Russians ate an average of 22 kg/per capita annually[30].

[24] https://ec.europa.eu/fisheries/press/north-east-atlantic-coastal-states-reach-agreement-blue-whiting-and-atlanto-scandian-herring_en
[25] https://ec.europa.eu/fisheries/press/42nd-annual-session-general-fisheries-commission-mediterranean-milestones-mediterranean-and_en
[26] https://ec.europa.eu/fisheries/press/eu-signs-sustainable-fishing-partnership-agreement-republic-gambia_en
[27] http://europa.eu/rapid/press-release_IP-18-6142_en.htm
[28] https://ec.europa.eu/fisheries/eu-renews-sustainable-fishing-partnership-agreement-cape-verde_en
[29] http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1156021/
[30] https://www.seafoodsource.com/news/supply-trade/russian-seafood-market-faces-challenge-of-generational-taste-shift

7 Macroeconomic Context

7.1 Marine fuel

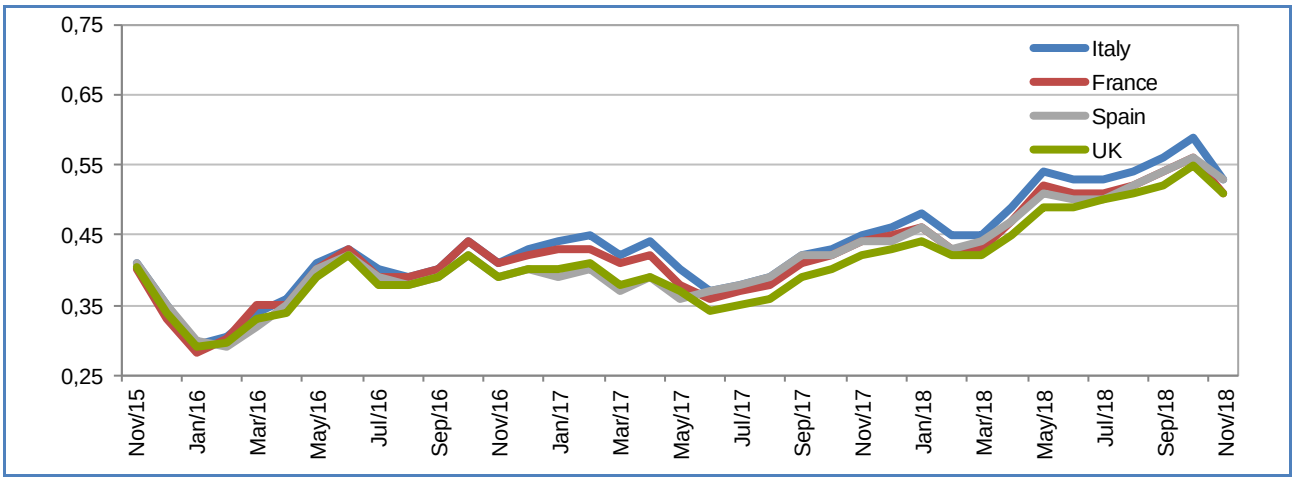
Average prices for marine fuel in **November 2018** ranged between 0,51 and 0,53 EUR/litre, in ports in **France, Italy, Spain,** and the **UK**. These prices were about 8% lower than in the previous month, but from November 2017, the increase was more than two times higher, as much as 21% higher in ports in the UK and 20% in ports in Spain.

Table 17. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Nov 2018	Change from Oct 2018	Change from Nov 2017
France *(ports of Lorient and Boulogne)*	0,51	-9%	16%
Italy *(ports of Ancona and Livorno)*	0,53	-10%	18%
Spain *(ports of A Coruña and Vigo)*	0,53	-5%	20%
The UK (ports of Grimsby and Aberdeen)	0,51	-7%	21%

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

Figure 51. **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 at 2,2% in October 2018, up from 2,1% in September 2018. A year earlier, it was 1,7%.

Inflation: lowest rates in October 2018, compared with September 2018.

Inflation: highest rates in October 2018, compared with September 2018.

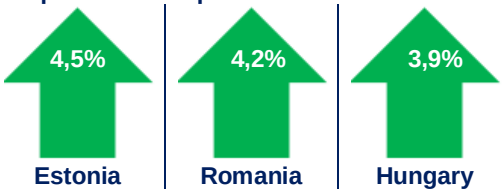


Table 18. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

HICP	Oct 2016	Oct 2017	Sep 2018	Oct 2018	Change from Sep 2018	Change from Oct 2017
Food and non-alcoholic beverages	99,89	102,82	104,38	104,52	↑ 0,13%	↑ 1,65%
Fish and seafood	103,57	107,01	109,41	109,46	↑ 0,05%	↑ 2,29%

Source: Eurostat.

7.3 Exchange rates

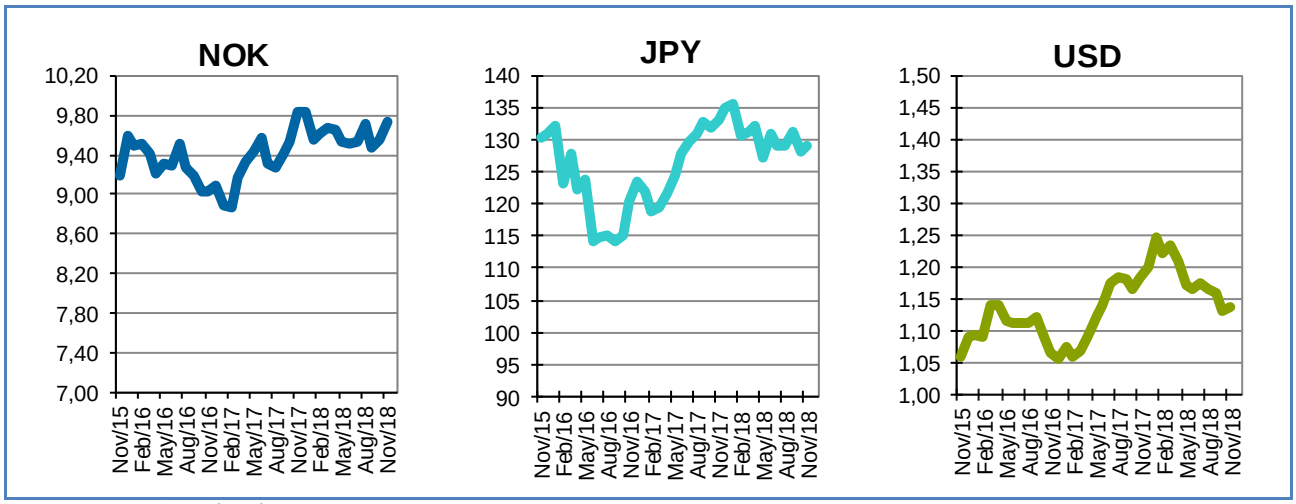
Table 19. **EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Nov 2016	Nov 2017	Oct 2018	Nov 2018
NOK	9,0190	9,8398	9,5528	9,7400
JPY	120,49	133,08	128,15	128,99
USD	1,0635	1,1849	1,1318	1,1359

Source: European Central Bank.

In November 2018, the euro appreciated against the Norwegian krone (+2,0%), the US dollar (+0,4%) and the Japanese yen (+0,7%) from October 2018. For the past six months, the euro has fluctuated around 1,15 against the US dollar. Compared with November 2017, the euro has depreciated 4,1% against the US dollar, 3,1% against the Japanese yen and 1,0% against the Norwegian krone.

Figure 52. **TREND OF EURO EXCHANGE RATES**



Source: European Central Bank.

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First sales: European Commission, FAO.

Consumption: EUROPANEL.

Case studies: Ministry of Agriculture, Forestry and Fisheries, Japan, FAO, Fisheries Agency/Foreign Trade statistics, Japan, ECB, Agriculture and agri-food Canada, Directorate-General for Internal Policies, Policy Department B: Structural and Cohesion policies, Fisheries and aquaculture in Europe Magazine, EUROSTAT.

Global highlights: European Commission (DG MARE, FAO, Seafoodsource.org).

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.

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