

# Monthly Highlights

No. 11 / 2018

## EUMOPA

European Market Observatory for  
Fisheries and Aquaculture Products

### In this issue

In October 2018, first-sales value and volume grew in Denmark, Estonia, Latvia, the Netherlands, Norway, Portugal, and the UK over October 2017. In the same period, they experienced downward trends in Belgium, Italy, Lithuania, Poland, and Sweden.

Over the past 36-months, average first-sales prices of brill increased in Belgium, France, and the Netherlands. Prices were the highest in France (11,13 EUR/kg), where the price was 32% higher than in the Netherlands and 46% higher than in Belgium.

Prices of tropical shrimp imported from Ecuador remain considerably lower in 2018 through week 47 (the third week of November) than a year earlier, an average of 6,00 EUR/kg in 2018 compared with 6,83 EUR/kg during the same 47-week period in 2017.

In January–September 2018, the average retail price of fresh flounder for household consumption in Sweden was 15,19 EUR/kg, 19% higher compared with the same period in 2017.

New Zealand exported 41.000 tonnes of seafood with a value of EUR 147 million to the EU in 2017. Blue grenadier was the most common species exported, mainly as frozen fillets or frozen fillet blocks.

Two main changes the current digitalisation trend has caused in the fish and seafood supply chain in the EU are: digitalisation of sales in fish auctions and online shops, and marketplaces for wholesalers and final consumers.

In November 2018, the EU, Norway and the Faroe Islands signed an agreement setting the Total Allowable Catch (TAC) for Northeast Atlantic mackerel at 653.438 tonnes in 2019, a 20% reduction from TAC in 2018.



### Contents

#### First sales in Europe

Brill (Belgium, France, the Netherlands) and European plaice (Denmark, the Netherlands, the UK)

#### Extra-EU imports

Weekly average EU import prices for selected products from selected countries of origin

#### Consumption

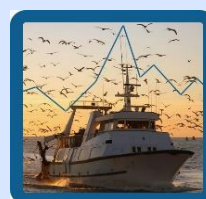
Fresh flounder in Sweden

#### Case studies

Fisheries and aquaculture in New Zealand

Digitalisation in the EU fish and seafood market

#### Global Highlights



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# 1 First sales in Europe

In **January–October 2018**, 12 EU Member States (MS) and Norway reported first-sales data for 11 commodity groups<sup>1</sup>.

## 1.1 Compared to the same period last year

**Increases in value and volume:** Denmark, Estonia, the Netherlands, Norway, Portugal, and Sweden experienced growth in first-sales value and volume. The Netherlands saw increases due to a large supply of blue whiting and herring, while the growth in Sweden occurred because of increased harvests of herring.

**Decreases in value and volume:** In Belgium, France, Italy, Latvia, Poland, and the UK declines were observed in both value and volume. The most significant drops were registered for Latvia and Poland due to decreased harvests of cod, herring, and sprat.

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

Country	January–October 2016		January–October 2017		January–October 2018		Change from January–October 2017	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
BE	13.392	52,52	12.995	52,53	11.566	49,35	-11%	-6%
DK	209.692	302,64	211.962	282,33	218.208	291,80	3%	3%
EE	37.226	8,97	36.674	8,66	37.572	9,18	2%	6%
FR	162.789	545,53	161.120	546,94	159.684	529,74	-1%	-3%
IT*	73.439	268,60	79.803	283,54	72.348	261,77	-9%	-8%
LV	41.848	8,92	46.684	9,41	36.027	6,60	-23%	-30%
LT	1.790	1,28	1.296	1,21	1.315	1,04	2%	-14%
NL	54.917	230,35	172.779	340,24	309.184	468,37	79%	38%
NO	2.166.385	1.889,71	2.284.331	1.784,92	2.438.972	1.824,56	7%	2%
PL	92.376	31,34	80.734	27,18	69.425	21,54	-14%	-21%
PT	89.274	166,56	83.051	163,76	88.570	171,45	7%	5%
SE	91.990	73,83	69.517	54,30	107.220	62,64	54%	15%
UK	367.653	665,28	253.545	457,73	209.722	396,16	-17%	-13%

Source: EUMOFA (updated 06.12.2018); volume data is reported in net weight.

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

<sup>1</sup> 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 October 2018

**Increases in value and volume:** First sales grew in Denmark, Estonia, Latvia, the Netherlands, Norway, Portugal, and the UK. The increase was sharp for Estonia and Latvia mainly because of higher harvests of shared stocks of sprat and herring in the Baltic Sea.

**Decreases in value and volume:** First sales dropped in Belgium, Italy, Lithuania, Poland, and Sweden. The decreases were particularly high in Lithuania due to lower harvests of European flounder and cod. Italy recorded decreases of the most important small pelagics species – anchovy.

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

Country	October 2016		October 2017		October 2018		Change from October 2017	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
BE	1.200	4,97	1.419	6,20	1.402	5,57	-1%	-10%
DK	30.521	39,00	28.019	32,73	29.886	41,46	7%	27%
EE	3.268	0,85	3.380	0,82	5.009	1,31	48%	59%
FR	17.823	60,71	17.974	61,93	18.129	59,07	1%	-5%
IT*	8.173	25,69	8.648	27,28	7.726	24,31	-11%	-11%
LV	5.568	1,09	4.979	0,94	8.328	1,39	67%	48%
LT	230	0,18	136	0,12	115	0,10	-15%	-16%
NL	9.036	42,01	26.163	42,86	30.448	52,44	16%	22%
NO	230.540	266,74	236.929	217,74	267.148	321,82	13%	48%
PL	4.841	2,26	5.444	2,17	840	0,33	-85%	-85%
PT	10.684	15,48	8.981	14,63	10.357	18,39	15%	26%
SE	7.298	7,97	7.491	4,48	6.828	4,24	-9%	-5%
UK	49.545	85,62	25.514	42,50	26.630	63,78	4%	50%

Source: EUMOFA (updated 06.12.2018); 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 **November 2018** available on EUMOFA website can be accessed [here](#).

### 1.3 First sales in selected countries


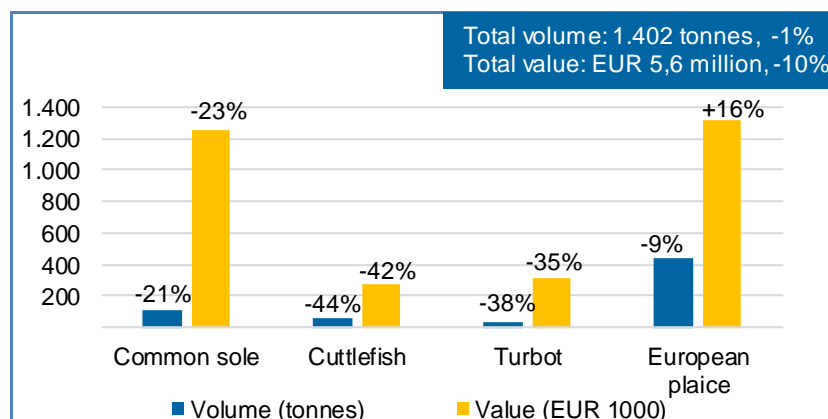
 In **Belgium** in **January–October 2018**, first sales fell by 6% in value (EUR -3,1 million) and 11% in volume (-1.429 tonnes), compared with the same period a year ago. This was mainly due to decreased first sales of monk, ray, turbot, common sole, and gurnard. In **October 2018**, both value and volume were lower compared with October 2017. Common sole, cuttlefish, and turbot were the main contributors to these decreases. Of the top species, the average price of shrimp *Crangon* spp. declined by 43%, while that of European plaice increased by 28%.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).


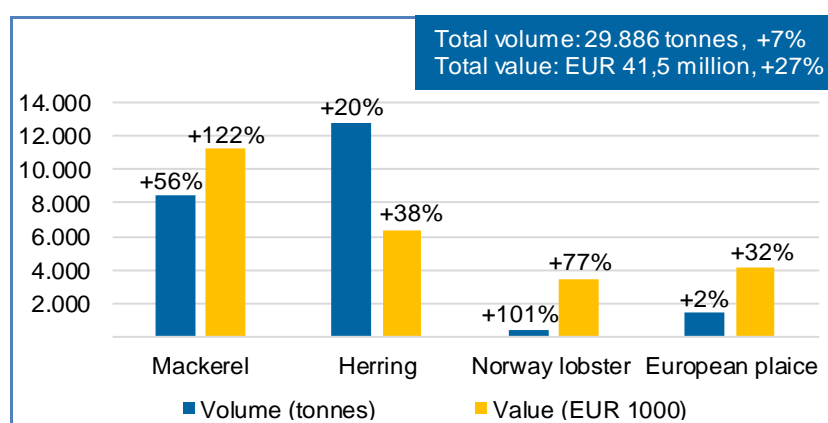
 In **Denmark** in **January–October 2018**, both first-sales value and volume increased by 3%, compared to the same period in 2017 due to an increase in first sales of mackerel (+185% in value and +114% in volume). In **October 2018**, both first-sales value and volume grew especially because of mackerel, herring, Norway lobster, and European plaice. A higher supply of mackerel did not lower its average price, which increased by 43% to 1,32 EUR/kg. On the other hand, the average price of Norway lobster declined by 12% to 7,94 EUR/kg – a consequence of the 101% increase of harvest.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).


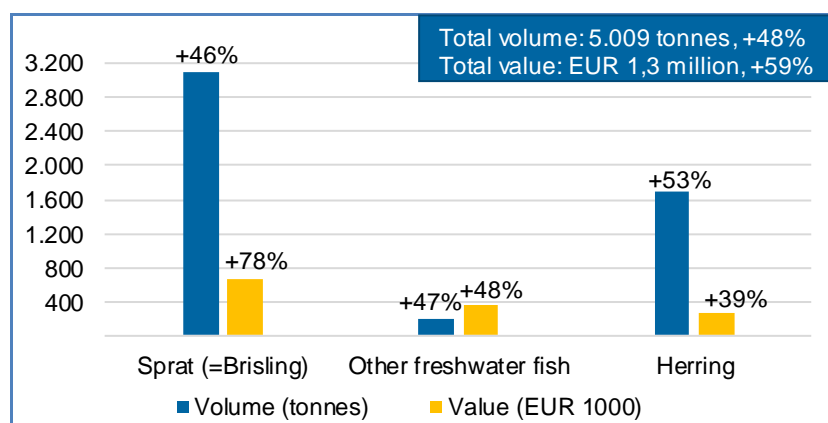
 In **January–October 2018**, **Estonia** saw growth in both first-sales value (+6%) and volume (+2%) over the same period a year before, due mainly to sprat (+20% in value and +12% in volume). In **October 2018**, compared to the same month in 2017, first sales grew by 59% in value and about half in volume due to higher harvests of sprat (brisling) and herring. Herring average prices decreased by 9% to 0,15 EUR/kg, whereas sprat prices grew by 22% to 0,21 EUR/kg.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).


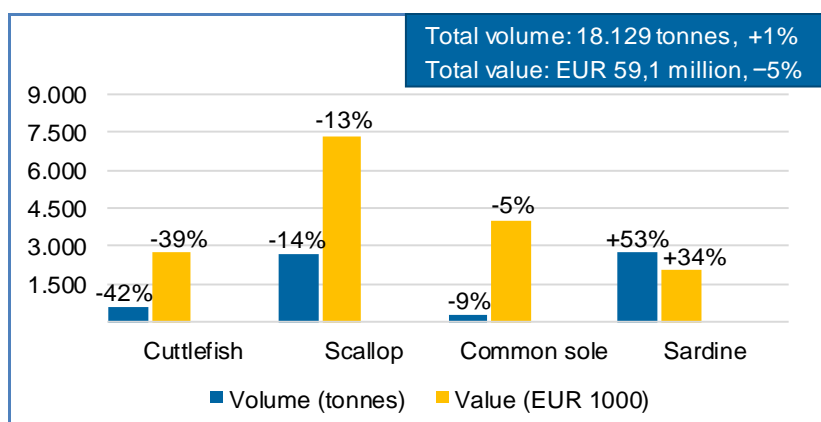
 In **France** in **January–October 2018**, first sales slightly decreased in both value (–3%) and volume (–1%) from January–October in 2017. Lower supplies of hake, Norway lobster, whiting, and cuttlefish were the key factors for these trends. In **October 2018**, first-sales value slightly increased 1% due to small pelagics (anchovy and sardine), whereas volume was down by 5% due to cuttlefish, scallop, Norway lobster, and common sole. Most of the top species that recorded higher supplies saw declines in average prices: for sardine and anchovy average prices fell by 12% and 28%, respectively.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).


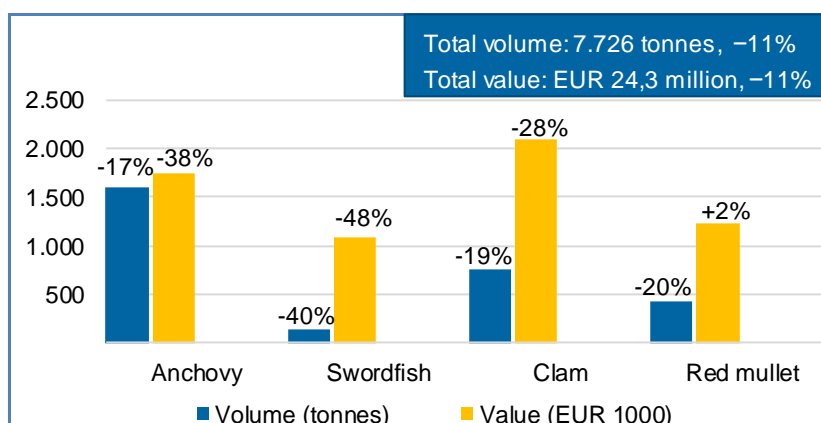
 In **Italy** in **January–October 2018**, first sales decreased by 8% in value and 9% in volume. Clam, anchovy, and sardine were the key species responsible for these changes. In **October 2018**, both first-sales value and volume declined by 11% due mostly to the same species and red mullet, which affected only first-sales volume decline. Although they saw increases in supplies, the sharp decreases in average prices were registered for anchovy (–25%) and swordfish (–16%) compared to October 2017.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).


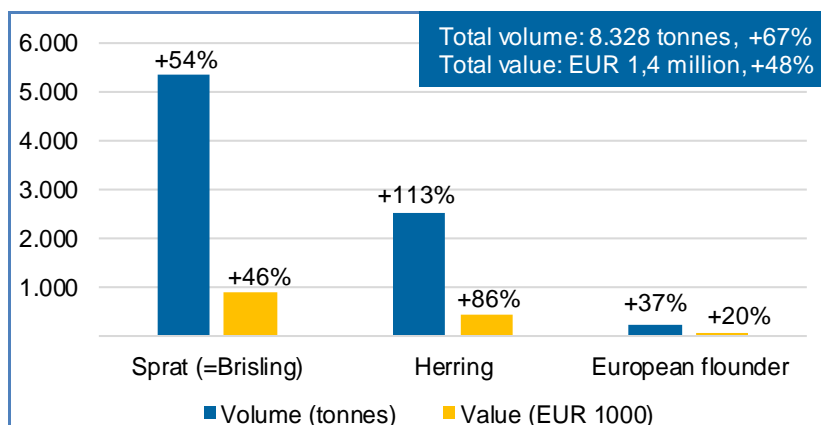
 In **Latvia** in **January–October 2018**, first sales decreased in value (–30%) and volume (–23%) due to lower supplies of sprat (–21%), herring (–24%), and cod (–77%) from the same period in 2017. In **October 2018**, first sales grew significantly over the same period in 2017. Good season for sprat and herring fishery were factors behind such trends. As a result, the average prices of these species were 5% and 13% lower, respectively, from October 2017.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).


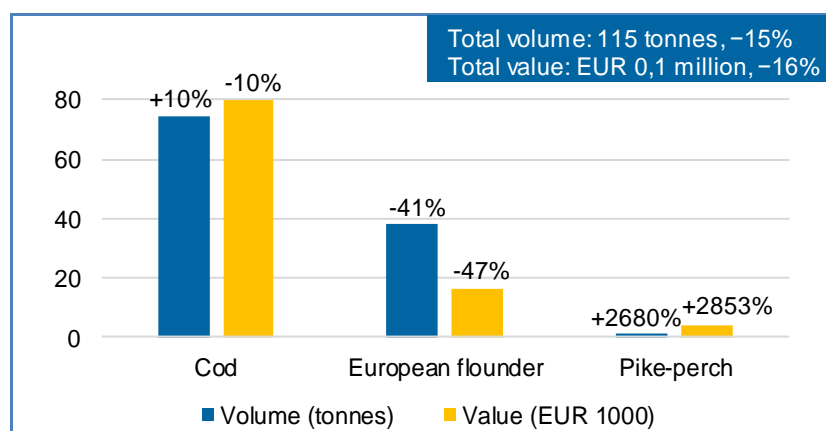
 In **Lithuania** in **January–October 2018**, first-sales value decreased by 14% due mainly to cod (–50%), whereas volume increased by 2% because of higher supplies of herring (+169%) and to a lesser extent of smelt (+50%), compared to January–October 2017. In **October 2018**, first-sales declined by 15% in value and 16% in volume because of European flounder and cod. Among other species, pike-perch registered a large increase in first sales (up by EUR 4.166 and 1.447 tonnes). Average prices of cod and European flounder went down by 18% and 11%, respectively, linked with the higher supply.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).


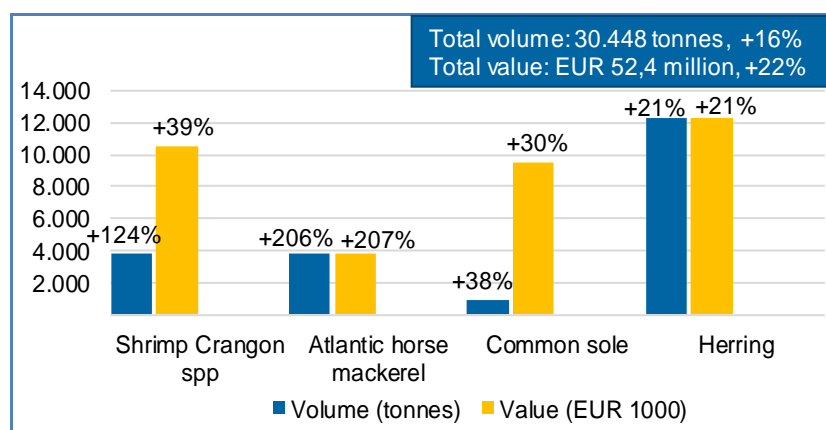
 In the **Netherlands** in **January–October 2018** compared to the same period in 2017, first-sales value and volume grew by 38% and 79%, respectively, due to blue whiting and horse mackerel, which together make up 26% and 39% of total first-sales value and volume, respectively. In **October 2018** the positive trends continued for the same species, including shrimp *Crangon* spp., common sole, and sardine. The price of shrimp *Crangon* spp. fell by 38%, while prices of Atlantic horse mackerel and herring remained stable.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).


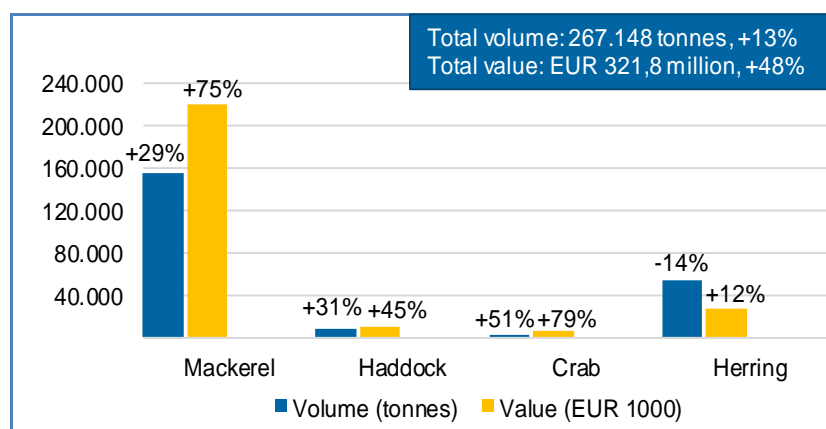
 In **Norway** in **January–October 2018**, first-sales value increased by 2%, mainly because of blue whiting (+75%), whereas volume increased by 7% because of miscellaneous small pelagics (+200%). In **October 2018**, both first-sales value and volume increased from October 2017. This was a result of high supply of mackerel (EUR +94,5 million and +34.774 tonnes) and its higher average price (+36% at 1,41 EUR/kg), compared to October the previous year. Other top species which contributed the most to these trends included haddock, crab, and herring.

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

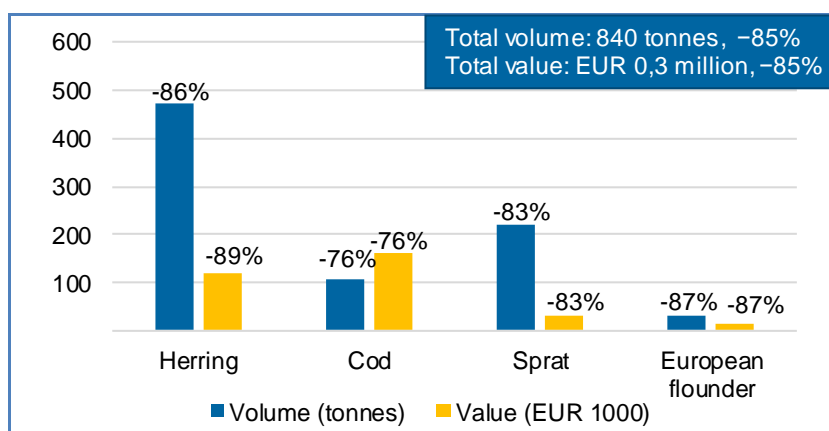


Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).



 In **Poland** in **January–October 2018**, both first-sales value (–21%) and volume (–14%) fell because of lower sales of cod, herring and sprat. In **October 2018**, both first-sales value and volume decreased by 85% due to the same species, including European flounder. The average price of herring decreased by 23% to 0,25 EUR/kg, whereas the price of cod fell by 1% to 1,51 EUR/kg.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).


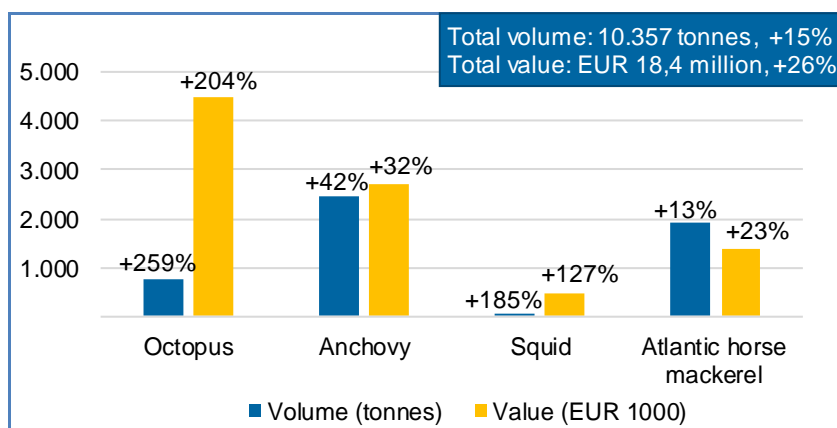
 In **Portugal** in **January–October 2018** compared to the same period in 2017, first sales rose by 5% in value and 7% in volume because of higher sales of cephalopods, particularly octopus and squid, but also due to small pelagics such as mackerel and Atlantic horse mackerel. In **October 2018**, the first-sales value and volume increase over October 2017 was the result of the same species, but the increase was more significant. Compared to the same period in 2017, the average price sharply declined for mackerel (down by 62% to 0,30 EUR/kg) and squid (down by 20% to 7,86 EUR/kg).

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



Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).


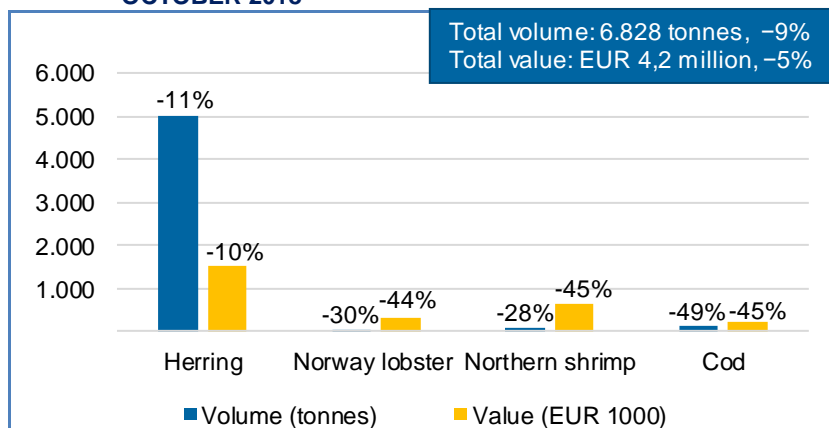
 In **Sweden**, first sales grew in both value (+15%) and volume (+54%) during **January–October 2018** over the same period in 2017. Herring was the main species of the first sales, whose volume of 74.592 tonnes was equivalent to 70% of the total catches. Comparing first sales of **October 2018** with those of the year before, the overall decrease of value and volume was due to herring, Northern shrimp, and cod. Of the top species, the price of Northern shrimp decreased by 23% (to 6,30 EUR/kg), whereas that of cod increased by 8% to 1,95 EUR/kg.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).


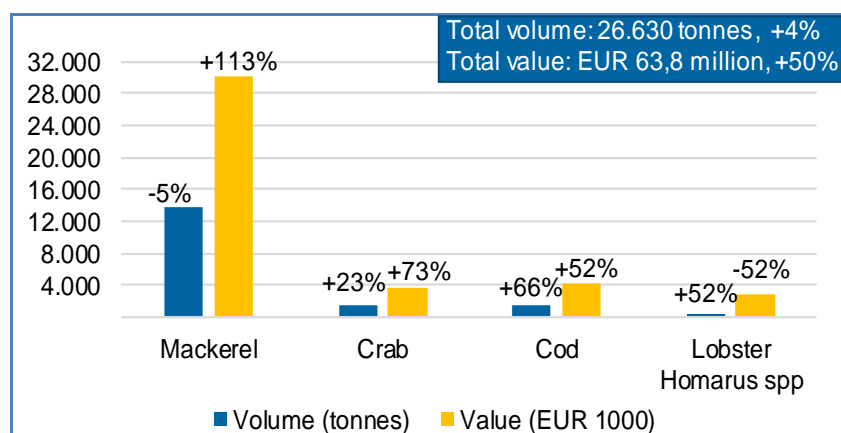
 In the UK in January–October 2018 from a year earlier, first-sales value decreased by 13% because of scallop, cuttlefish, hake, and haddock, while volume went down by 17% due to the same species and mackerel. In October 2018, first sales spiked in value, whereas volume grew slightly compared with October 2017. Mackerel, crab, cod, and lobster *Homarus* spp. were the main species responsible for first-sales value growth, whereas saithe, crab, and cod caused the volume increase. Lower volume of mackerel contributed to its spike in total first-sales value as the average price increased by 124% over October 2017.

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

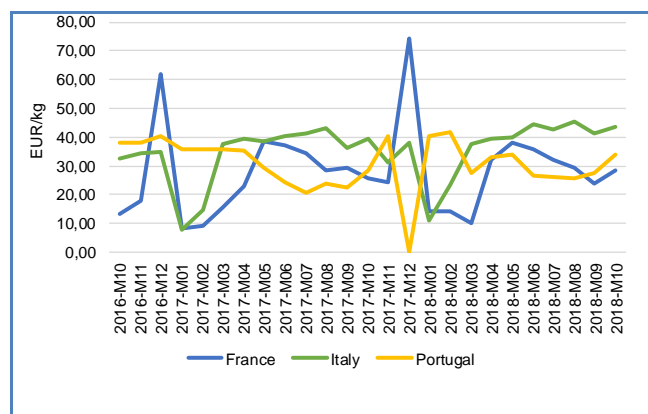


Percentages show change from previous year.  
Source: EUMOFA (updated 06.12.2018).



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

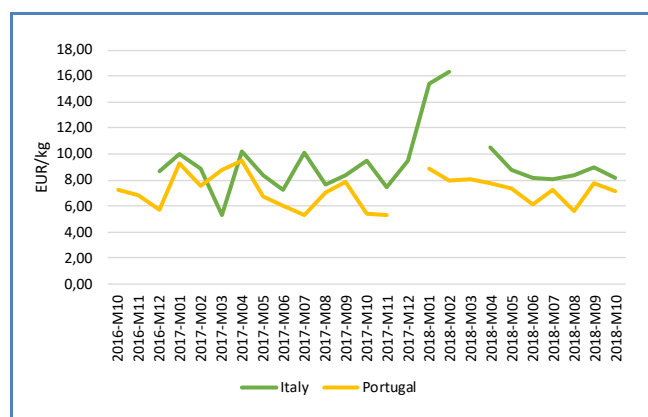
Figure 14. FIRST-SALES PRICES OF ROCK LOBSTER AND SEA CRAWFISH IN FRANCE, ITALY, AND PORTUGAL



Source: EUMOFA (updated 06.12.2018).

First sales in the EU of **rock lobster and sea crawfish** are widespread, but three countries, **France, Italy, and Portugal** accounted for nearly 70% of total 2018 reported first sales through October. The average first-sales prices in these countries in **October 2018** were 28,41 EUR/kg in France (up by 20% from September 2018 and by 11% from October 2017), 43,58 EUR/kg in Italy (up by 6% from the previous month and by 10% from the same month in 2017), and 33,99 EUR/kg in Portugal (up by 25% from September 2018 and by 20% from October 2017). The fisheries in all three countries are highly seasonal, with volumes peaking in June and July and nearly non-existent in January and February, but first-sales prices are not clearly tied to monthly supplies.

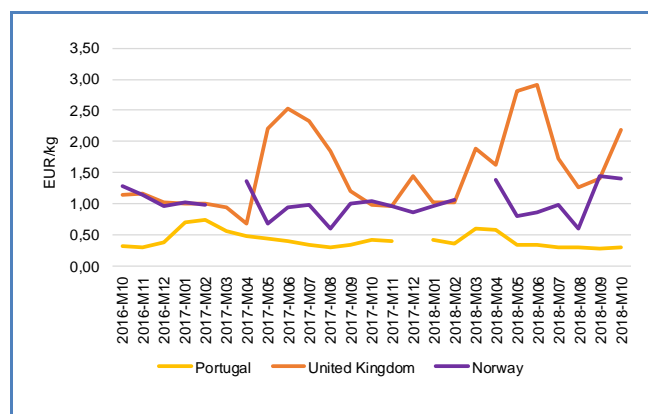
Figure 15. FIRST-SALES PRICES OF SWORDFISH IN ITALY AND PORTUGAL



Source: EUMOFA (updated 06.12.2018).

Most reported EU first sales of **swordfish** take place in **Italy and Portugal**, which combined had a 96% share of reported sales through **October 2018**. The average prices in these countries in October were 8,20 EUR/kg in Italy (down by 9% from the previous month and down by 14% from the same month in 2017), and 7,16 EUR/kg in Portugal (down by 7% from September 2018 but up by 32% from October 2017). Supply is very seasonal in Italy, tending to peak in July and reach low points in February–March. The price reflects this, peaking at 16,35 EUR/kg in February, when reported sales volumes were almost zero (and were zero in the following month). Over the last two years there has been no long-run price trend up or down in either reporting country.

Figure 16. FIRST-SALES PRICES OF MACKEREL IN PORTUGAL, THE UK, AND NORWAY



Source: EUMOFA (updated 06.12.2018).

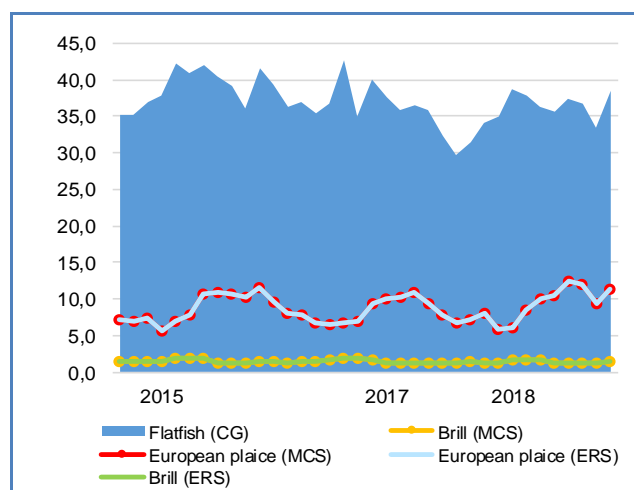
First sales of **mackerel** occur in several European countries, but three countries have so far accounted for 86% of reported sales in 2018. The average first-sales prices in these countries in **October 2018** were 0,31 EUR/kg in **Portugal** (up by 8% from September 2018 but down by 26% from October 2017), 2,18 EUR/kg in the **UK** (up by 57% from the previous month and by 124% from the same month in 2017), and 1,41 EUR/kg in **Norway** (down by 2% from September 2018 but up by 36% from a year earlier). Prices during the reviewed period have moved in different directions: the price in Portugal has declined slightly, while in the UK it has moved irregularly upward, and the price in Norway has shown no long-run tendency.

## 1.5. Commodity group of the month: Flatfish

The **Flatfish** commodity group (CG) ranked 3<sup>rd</sup> in value and 6<sup>th</sup> in volume among 11 CG sold at the first-sales stage in October 2018<sup>2</sup>. First sales reached EUR 38,5 million and 7.877 tonnes – increases of 19% in value and 11% in volume over October 2017. In the past 36 months, the highest value of flatfish was registered in March 2017, at more than EUR 42 million.

The Flatfish commodity group includes 13 main commercial species (MCS): brill, dab, European flounder, Atlantic halibut, Greenland halibut, megrim, European plaice, common sole, other flounder, turbot and flatfish species that are grouped as other plaice, other sole, and other flatfish. At the species (ERS<sup>3</sup>) level, brill and European plaice together made up 30% of total first-sales value of flatfish species during January–October 2018<sup>4</sup>.

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



Source: EUMOFA (updated 06.12.2018).

\*Norway excluded due to a limited level of data for species at ERS level.

## 1.6. Focus on brill



Brill (*Scophthalmus rhombus*) is a very large, broad bodied, left-eyed flatfish that belongs to the turbot family of Scophthalmidae. It is usually a sandy brown to olive green colour, with dark and light spots. The underside is creamy-white. Like many flatfish brill is capable of camouflage and can change its colour to match that of the seabed. Adult fish can grow to 75 cm in length although most are less than 50 cm. The spawning period is during April–August at depths of 10–20 m<sup>5</sup>. Brill is marketed fresh and frozen, eaten steamed, fried or boiled.

The species can be found in the North Sea, the Skagerrak and the Kattegat, and the English Channel. Fisheries occur throughout the year with the main season in the period November–April.

Brill is mainly a bycatch species in fisheries for plaice, sole and turbot. The most frequently used gears are trammel gillnets, fixed nets, beam and otter trawls<sup>6</sup>. Brill and turbot fisheries in the ICES division IIa and IV (North Sea) are managed jointly under the EU Common Fisheries Policy (CFP) through annual Total Allowable Catches (TACs). In 2018 the TAC has been set at 7.102 tonnes<sup>7</sup>.

<sup>2</sup> More data on commodity groups can be found in table 1.2 in the Annex.

<sup>3</sup> Species reported at Electronic Reporting System (ERS) level, based on FAO 3-alpha codes.

<sup>4</sup> Ranking of the main commercial species in the Flatfish species commodity group can be found in table 1.3 in the Annex.

<sup>5</sup> <http://www.habitas.org.uk/marinelife/species.asp?item=ZG8630>

<sup>6</sup> <http://ices.dk/sites/pub/Publication%20Reports/Advice/2017/2017/bll.27.3a47de.pdf>

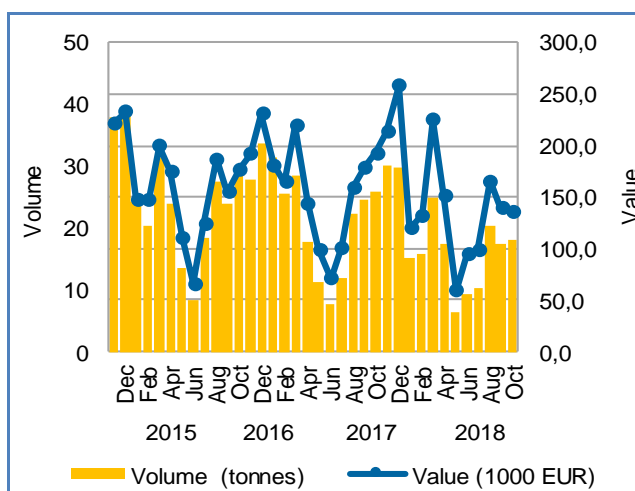
<sup>7</sup> COUNCIL REGULATION (EU) 2018/120 <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX:32018R0120>

## Selected countries

In **Belgium** in January–October 2018, first sales of brill decreased by 13% in value and 25% in volume compared to the same period in 2017. Compared to January–October 2016, the value decreased by 11% and the volume by 30%. In October 2018, both first-sales value and volume fell by approximately a third from the same month in 2017.

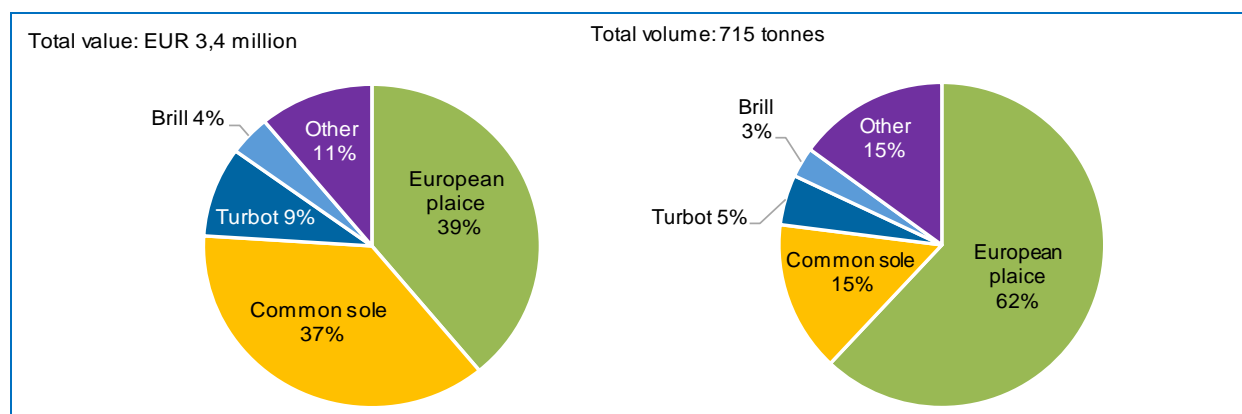
All brill first sales occur in the North Sea at the ports of Zeebrugge, Oostende, and Nieuwpoort.

Figure 18. **BRILL: FIRST SALES IN BELGIUM**



Source: EUMOFA (updated 06.12.2018).

Figure 19. **FIRST-SALES COMPARISON OF FLATFISH SPECIES IN BELGIUM, VALUE AND VOLUME, OCTOBER 2018**

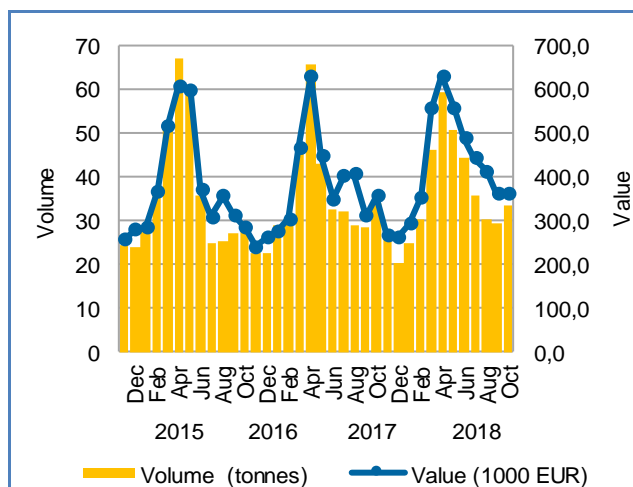


Source: EUMOFA (updated 06.12.2018).

In **France**, in January–October 2018, first sales of brill grew by 13% in value and 4% in volume, over the same period in 2017. Compared with 2016, first sales value increased by 11% although volume remained stable. In October 2018 first-sales value and volume were near the same levels as in October 2017.

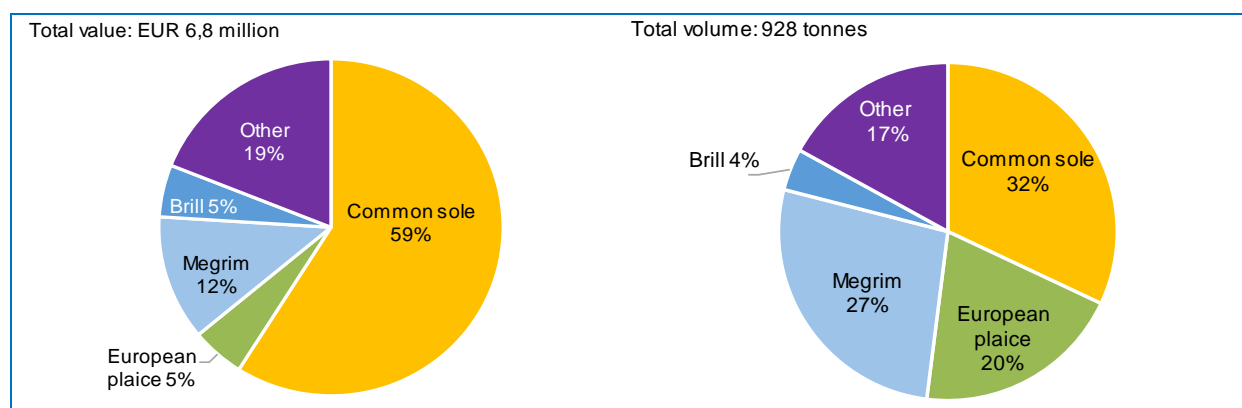
Over half (54%) of the first sales of brill occurred along the coast of the Celtic seas, followed by the Bay of Biscay (32%) and the Mediterranean Sea (12%). The port of Roscoff is one of the most important in terms of first-sales value.

Figure 20. **BRILL: FIRST SALES IN FRANCE**



Source: EUMOFA (updated 06.12.2018).

Figure 21. **FIRST-SALES COMPARISON OF FLATFISH SPECIES IN FRANCE, VALUE AND VOLUME, OCTOBER 2018**

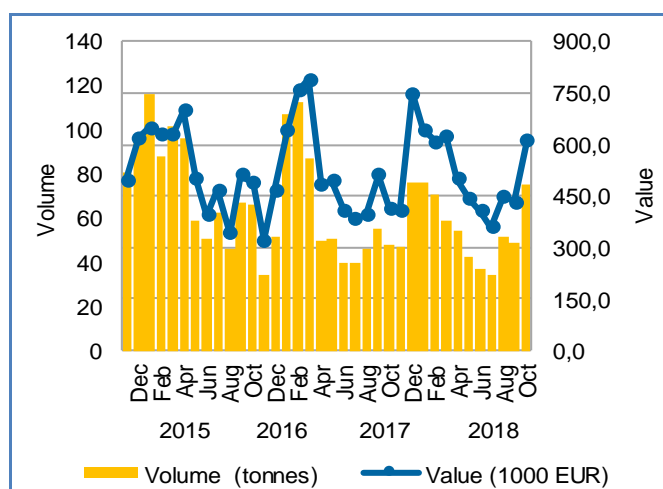


Source: EUMOFA (updated 06.12.2018).

In the **Netherlands** in January–October 2018, first-sales value and volume of brill fell by 4% and 14%, respectively, from January–October 2017. Trends were sharper compared to the same period of 2016, as value and volume declined by 5% and 27%, respectively. In October 2018, first sales increased by 47% in value and 59% in volume compared to the previous year.

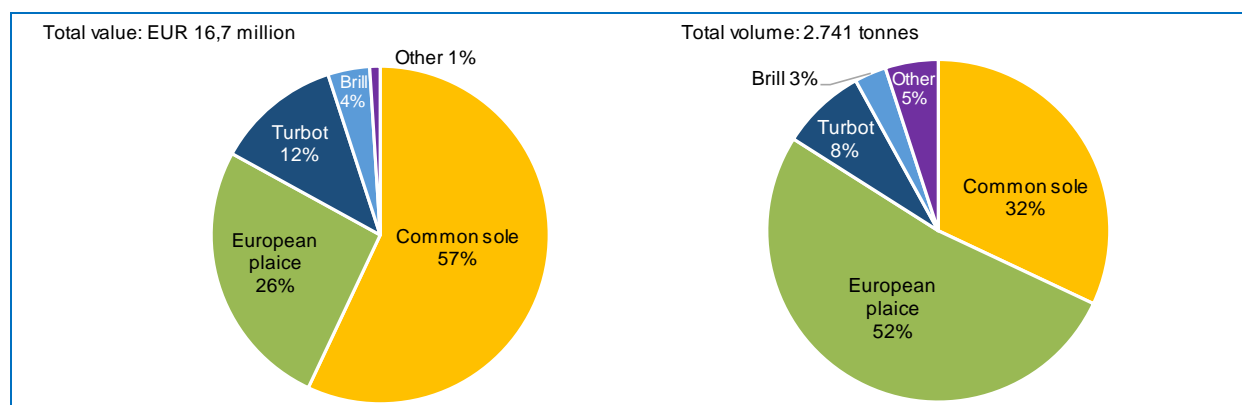
All the brill first sales were on the North Sea coast. The ports of Velsen, Urk, and Scheveningen are responsible for about 70% of total first-sales value among nine ports in January–October 2018.

Figure 22. **BRILL: FIRST SALES IN THE NETHERLANDS**



Source: EUMOFA (updated 06.12.2018).

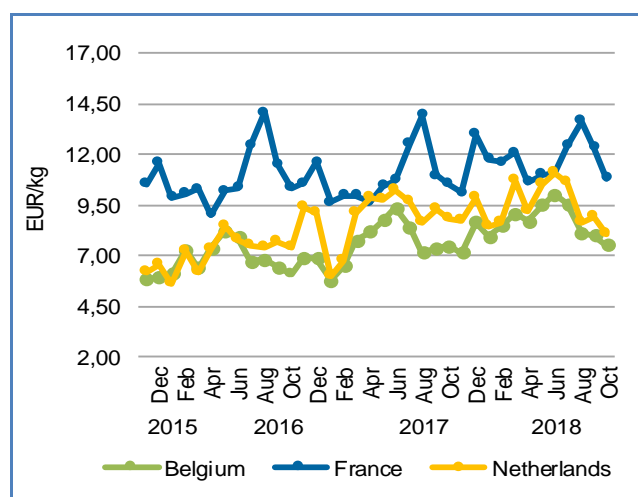
Figure 23. **FIRST-SALES COMPARISON OF FLATFISH SPECIES IN THE NETHERLANDS, VALUE AND VOLUME, OCTOBER 2018**



Source: EUMOFA (updated 06.12.2018).

## Price trends

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



Source: EUMOFA (updated 06.12.2018).

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

**First sales:** Belgium (5/2017, 2/2016), Denmark (5/2017), France (5/2017), the UK (5/2017).

During the past 36 months (November 2015–October 2018), average first-sales prices of brill increased in all three analysed countries. The highest prices were recorded in France (11,13 EUR/kg), 32% higher than in the Netherlands (8,46 EUR/kg), and 46% more than the average price in Belgium (7,60 EUR/kg).

In **Belgium** in the first ten months of 2018, the average price increased by 16% to 8,52 EUR/kg compared to January–October 2017 and was 26% above prices in the same period of 2016. The peak price was recorded in June 2018 when 9 tonnes were sold for 10,00 EUR/kg. The lowest average price occurred in January 2017 when 31 tonnes were sold for 5,76 EUR/kg. The highest brill fishery season takes place during November–December.

In **France**, which has the highest average prices of brill among the surveyed countries, average price of brill (11,59 EUR/kg) in the first ten months of 2018 was higher than in the same period in the previous two years: +9% than in 2017, and +11% than in 2016. The highest recorded price in the 36-month period was in August 2016 when it reached 14,07 EUR/kg for a volume of only 25 tonnes. The lowest price (at 9,01 EUR/kg for 67 tonnes) was recorded in April 2016 when the harvest reached its highest level.

In the **Netherlands** in January–October 2018, the average first-sales price (9,23 EUR/kg) increased by 11% over the same period in 2017, and 31% over 2016. The highest average price was recorded in June 2018 when 37 tonnes were sold at 11,08 EUR/kg, whereas the lowest price (5,56 EUR/kg) for 116 tonnes occurred in January 2016.

## 1.7. Focus on European plaice



European plaice (*Pleuronectes platessa*) is a commercially important flatfish species belonging to the family of Pleuronectidae. It can be found in the Barents, the Mediterranean Sea and in the Northeast Atlantic.

It is a demersal species occurring on mud and sand bottom from a few meters to about 100 m. The species has bright red to orange spots, separating it from other flatfishes with the underside being pearly white. European plaice reaches sexual maturity at the age of 3 to 7 years and the spawning period takes place from December to March with peaks in January–February<sup>8</sup>. Common gears used in the plaice fishery are trammel gillnet, fixed gillnet, Danish seine, beam, and demersal trawl. European plaice is commonly fished in mixed fisheries with sole and other flatfish species. It is consumed steamed, fried, boiled, or baked<sup>9</sup>.

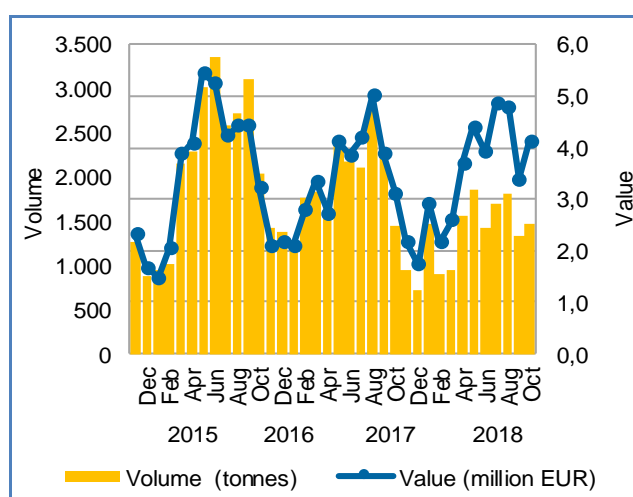
The species is a subject to Total Allowable Catches (TACs) established on the basis of maximum sustainable yield advice of the International Council for the Exploration of the Sea (ICES). In 2018, quotas for EU vessels were at 15.343 tonnes in the Skagerrak, 1.483 in the Kattegat, 104.758 tonnes in the Union waters of division 2a (part of division 3a not covered by the Skagerrak and the Kattegat)<sup>10</sup>.

### Selected countries

In **Denmark** in January–October 2018, European plaice first-sales value grew by 5% and volume declined by 27% from the same period in 2017. Compared to 2016, first sales were 4% lower in value and 38% in volume. In October 2018, first-sales value went up by a third and volume increased slightly by 2% compared to the same month a year earlier.

More than 90% of the first sales occurred at the ports on the North Sea, with the rest on the Baltic Sea. The ports of Thyborøn, Hvide Sande, and Hanstholm are those where the highest first-sales value was recorded.

Figure 25. **EUROPEAN PLAICE: FIRST SALES IN DENMARK**



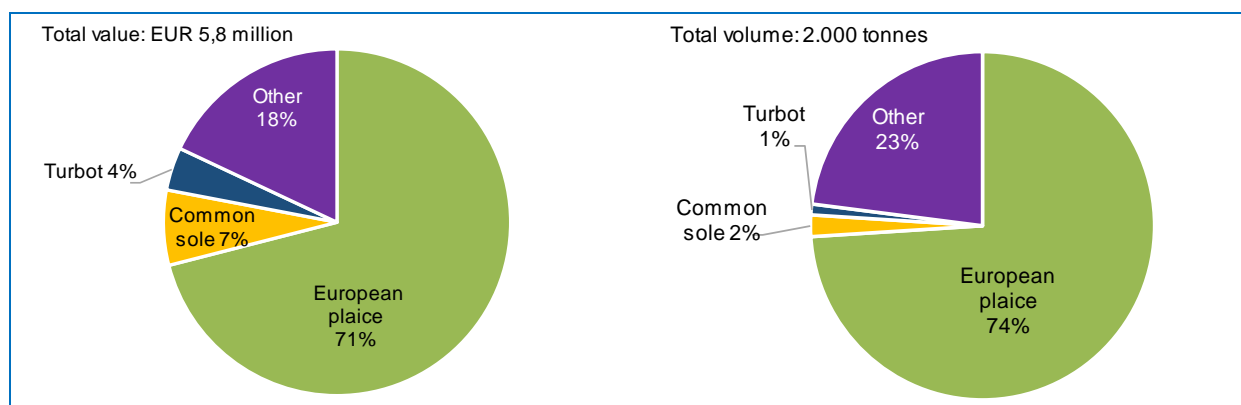
Source: EUMOFA (updated 06.12.2018).

<sup>8</sup> <http://www.fishbase.org/summary/1342>

<sup>9</sup> <http://www.fao.org/fishery/species/3354/en>

<sup>10</sup> COUNCIL REGULATION (EU) 2018/120 <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX:32018R0120>

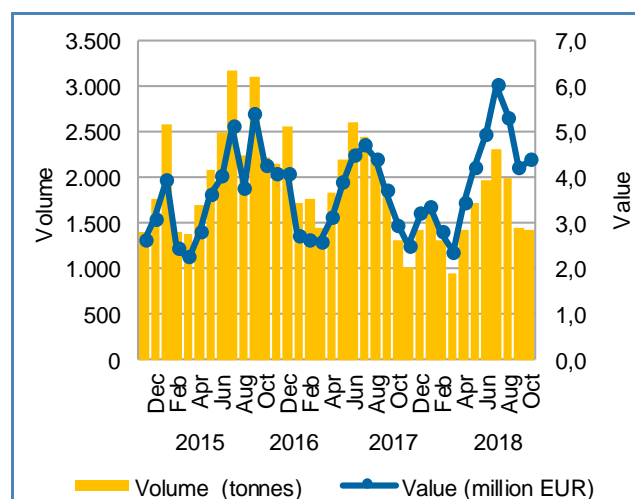


Figure 26. **FIRST-SALES COMPARISON OF FLATFISH SPECIES IN DENMARK, VALUE AND VOLUME, OCTOBER 2018**

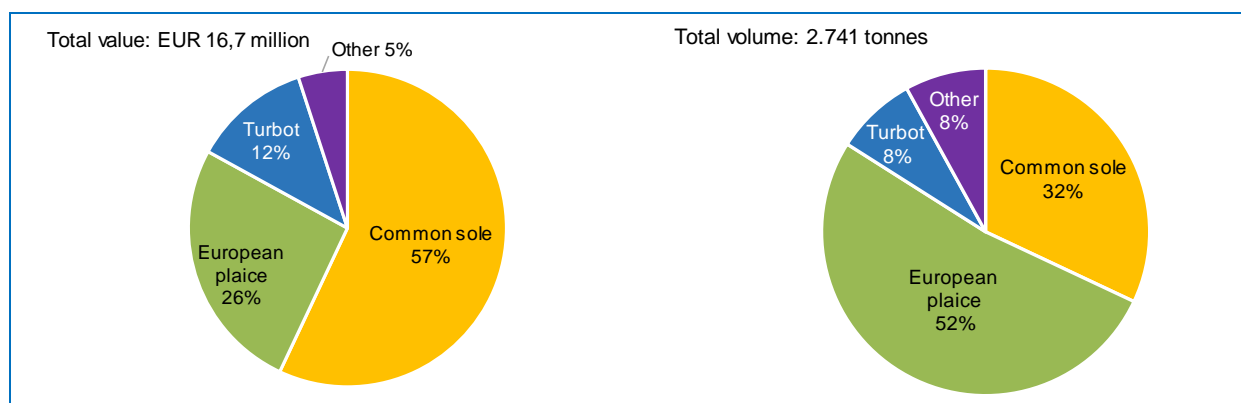
Source: EUMOFA (updated 06.12.2018).

In the Netherlands in January–October 2018, first sales of European plaice grew by 16% in value but fell by the same percentage in volume from the same period in 2017. Trends had the same directions compared to 2016: value increased by 9%, whereas volume decreased 27%. In October 2018, first-sales value spiked by +48% and volume grew by 9% over October 2017.

The ports of Urk and Velsen on the North Sea coast accounted for 73% of first-sales value in 2018.

Figure 27. **EUROPEAN PLAICE: FIRST SALES IN THE NETHERLANDS**

Source: EUMOFA (updated 06.12.2018).

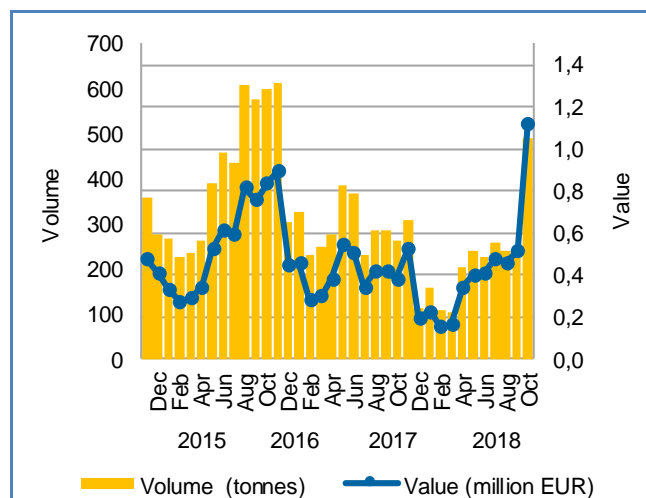
Figure 28. **FIRST-SALES COMPARISON OF FLATFISH SPECIES IN THE NETHERLANDS, VALUE AND VOLUME, OCTOBER 2018**

Source: EUMOFA (updated 06.12.2018).

In the **UK** in January–October 2018, first sales of European plaice increased in value by 6% and decreased in volume by 22%, compared to the same period in 2017. First-sales value and volume dropped by 21% and 44%, respectively, compared to 2016. In October 2018, first-sales value rose twofold, whereas volume grew by 85% over October 2017. The European plaice fishery in the UK is less significant in terms of first sales compared to the rest of the surveyed countries.

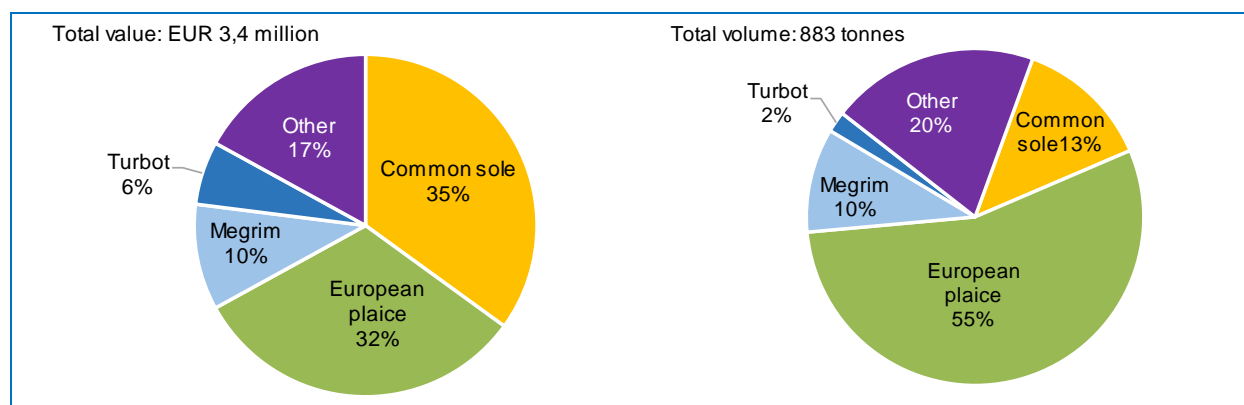
In 2018, the UK first sales took place in the North Sea and the Celtic Sea. Among 138 ports where sales occurred, the highest value was recorded at the ports of Peterhead, Scalloway, and Fraserburgh.

Figure 29. **EUROPEAN PLAICE: FIRST SALES IN THE UK**



Source: EUMOFA (updated 06.12.2018).

Figure 30. **FIRST-SALES COMPARISON OF FLATFISH SPECIES IN THE UK, VALUE AND VOLUME, OCTOBER 2018**



Source: EUMOFA (updated 06.12.2018).

## Price trends

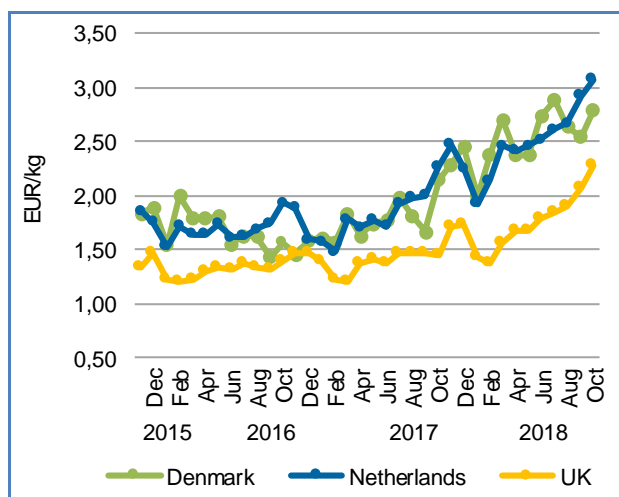
Throughout the past three years, the average first-sales price of European plaice increased by about 50% in all surveyed countries. The highest average price was observed in the Netherlands (2,00 EUR/kg), about 1% more than in Denmark (1,99 EUR/kg), and 35% over the average price in the UK (1,49 EUR/kg).

In **Denmark** in January–October 2018, the average first-sales price (2,55 EUR/kg) increased by 43% over the same period in 2017 and 54% over 2016. The highest price was recorded in July 2018, at 2,88 EUR/kg for 1.688 tonnes, whereas the lowest was registered in September 2016, when 3.097 tonnes were sold at 1,44 EUR/kg. The peak season for the European plaice fishery is during summer, starting in May up to September.

In **the Netherlands**, the average price of European plaice during January–October 2018 was 2,52 EUR/kg – an increase of 33% over the same period in 2017, and about half more than in 2016. For the past 36 months, prices were the highest when supply was lower, whereas lower prices were observed during the summer when the European plaice fishery is the most active. The peak average price occurred in October 2018 at 3,08 EUR/kg when 1.422 tonnes were sold, while the lowest price was registered in February 2017 when 1.774 were sold at 1,48 EUR/kg.

In **the UK** in the first ten months of 2018, the average price of European plaice reached 1,87 EUR/kg – an increase of 35% over the same period in 2017 and 42% over 2016. The highest price was recorded in October 2018 when 489 tonnes were sold. The lowest price in the three-year period occurred in March 2017 at 1,19 EUR/kg for 248 tonnes.

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



Source: EUMOFA (updated 06.12.2018).

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

**First sales:** Belgium (2/2016, 6/2014, January 2014), Denmark (8/2015, June 2013), Sweden (6/2016).

**Consumption:** Germany (11/2017, 2/2016), the Netherlands (11/2017, 2/2016, 5/2015), Sweden (2/2016), the UK (11/2017, 2/2016, 5/2015).

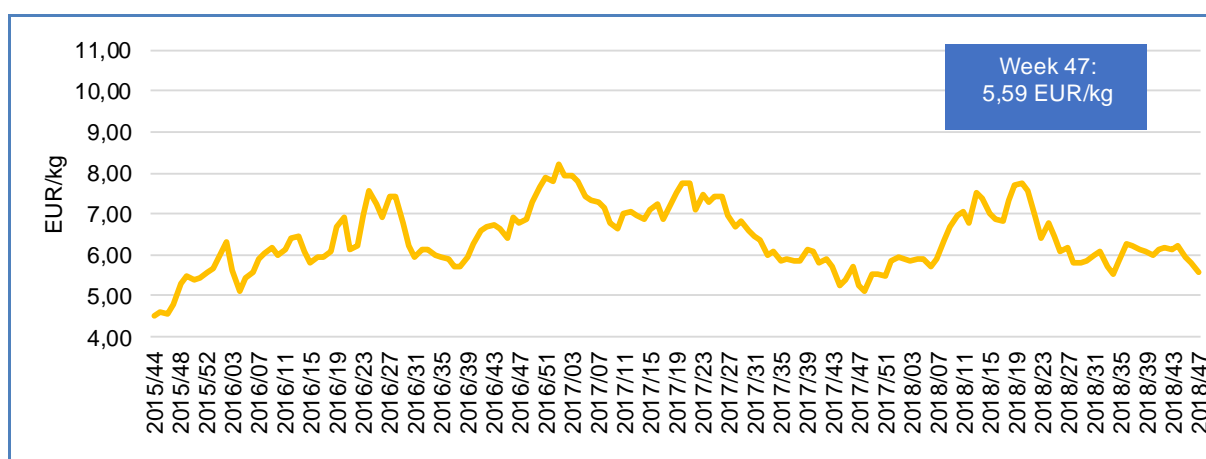
**Topic of the month:** Plaice in the Netherlands (6/2016, 3/2015).

## 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 frozen Nile perch, fresh coalfish, and smoked trout, along with three species products that are examined each month as part of the month's selected commodity group, which this month is flatfish and the selected species products are frozen sole, fresh turbot, and fresh plaice.

For fresh whole **Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway**, the EU import price has continued to decline from peak levels in May 2018. The price in **week 47** (the third week of November) of 5,59 EUR/kg was down by 4% from the previous week and 28% from the 2018-peak price of 7,75 EUR/kg in week 20. The boost in holiday demand and prices that industry expects has not yet materialized, but at this time in 2017 prices reached bottom (5,11 EUR/kg in week 48) so the current market may strengthen.

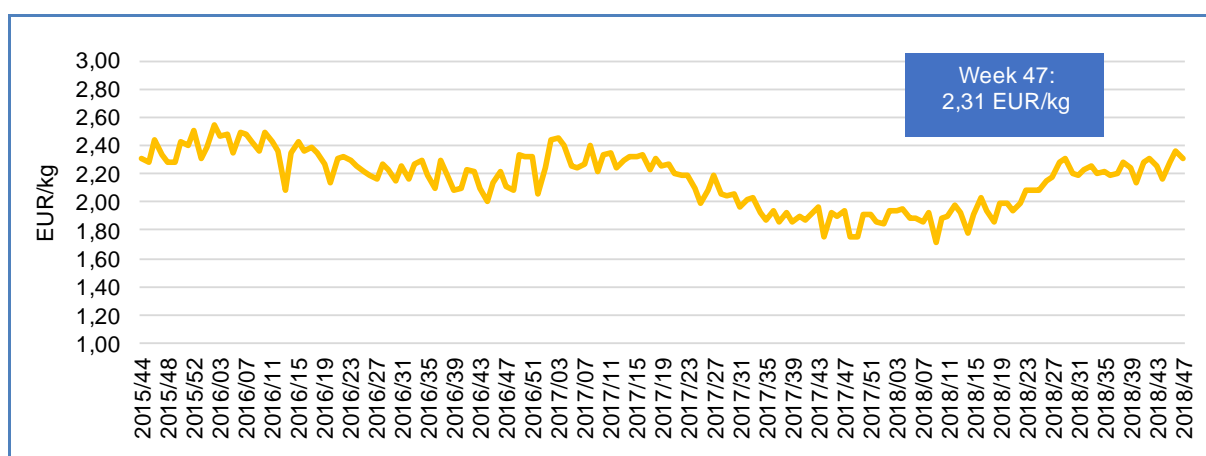
Figure 32. IMPORT PRICE OF ATLANTIC SALMON, FRESH WHOLE FROM NORWAY



Source: European Commission (updated 06.12.2018).

The weekly price of frozen fillets of **Alaska pollock** (*Theragra chalcogramma*, CN code 03047500) imported from **China** fell by 2% in **week 47** to 2,31 EUR/kg, but it is still experiencing a gradual recovery from depressed levels observed during much of the early part of the year, when the weekly average price fell to 1,71 EUR/kg in week 9 of 2018. There appears to be a long-run upturn in prices which, if it continues through this year, would be the first significant turn-around during the three-year period under examination.

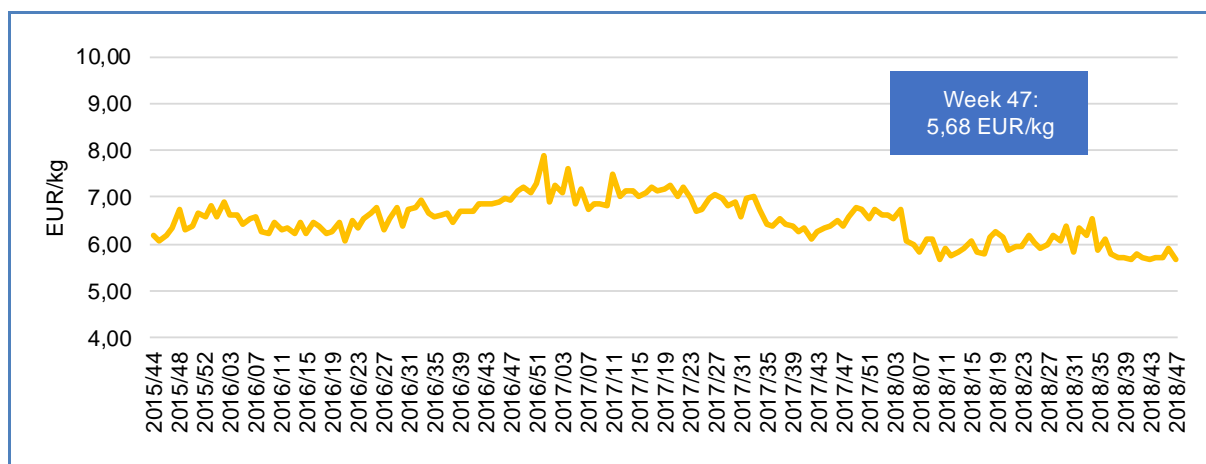
Figure 33. IMPORT PRICE OF ALASKA POLLOCK, FROZEN FILLETS FROM CHINA



Source: European Commission (updated 06.12.2018).

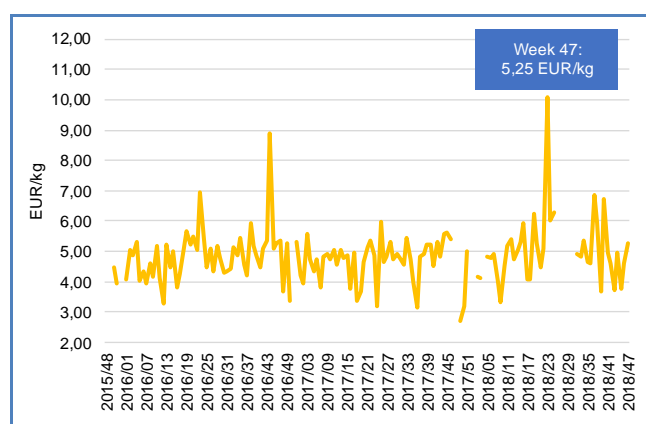
The price of frozen **tropical shrimp** (genus *Penaeus*, CN code 03061792) imported from Ecuador in **week 47** fell slightly compared with week 46 (-4%, to 5,68 EUR/kg) on a large (+45%) increase in volume. Prices in 2018 through week 47 remain considerably lower than a year earlier, an average of 6,00 EUR/kg in 2018 compared with 6,83 EUR/kg during the same 47-week period in 2017. Average weekly volume so far in 2018 is slightly higher than the same period in 2017. Ecuador's exports continue to grow, although much of the increase is going to Asia.

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



Source: European Commission (updated 06.12.2018).

Figure 35. **IMPORT PRICE OF SOLE, FROZEN WHOLE FROM MOROCCO**

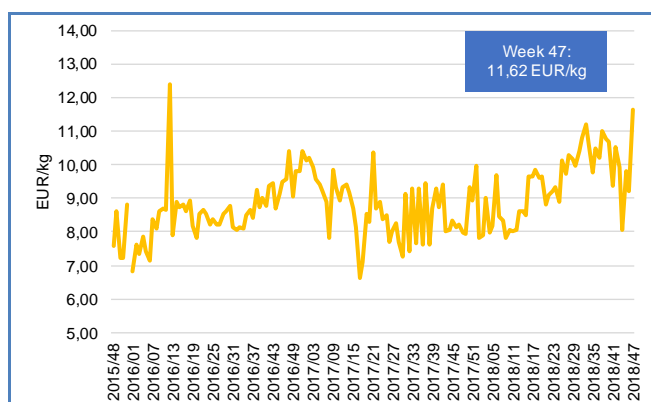


Source: European Commission (updated 06.12.2018).

For **sole**, in frozen whole form (*Solea* spp., CN code 03033300) from **Morocco**, the EU import price was 5,25 EU/kg in **week 47**, up by 15% from the previous week, while import volume fell by 71%. The week's changes were not unusual, either in price or volume, for this product. Its price is very volatile, although over the last three years there has been no significant longer-run tendency. Weekly volume is erratic as well, often disappearing altogether, but with no seasonal cycle.

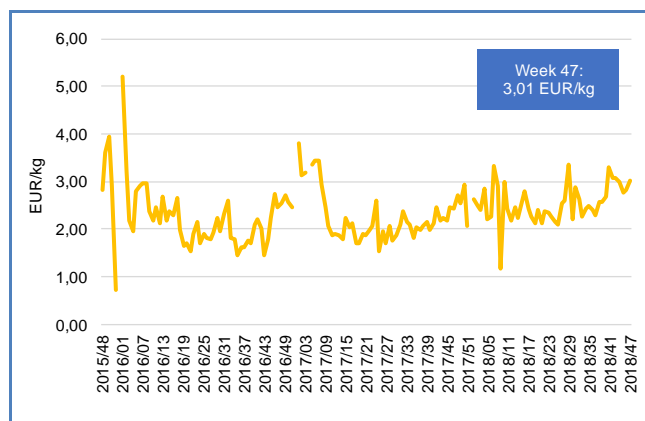
The EU import price of **turbot**, fresh whole (*Psetta maxima*, CN code 03022400) from **Norway** rose by 26% in **week 47**, to 11,62 EUR/kg, its highest value in over two years. This product's price has been rising irregularly for more than a year, from a low point of 6,64 EUR/kg in week 17 of 2017. Weekly volume has influenced the price for much of 2018, as volume has been on a long-run decline. A similar pattern occurred in 2016.

Figure 36. **IMPORT PRICE OF TURBOT, FRESH WHOLE FROM NORWAY**



Source: European Commission (updated 06.12.2018).

Figure 37. **IMPORT PRICE OF FRESH PLAICE FROM ICELAND**

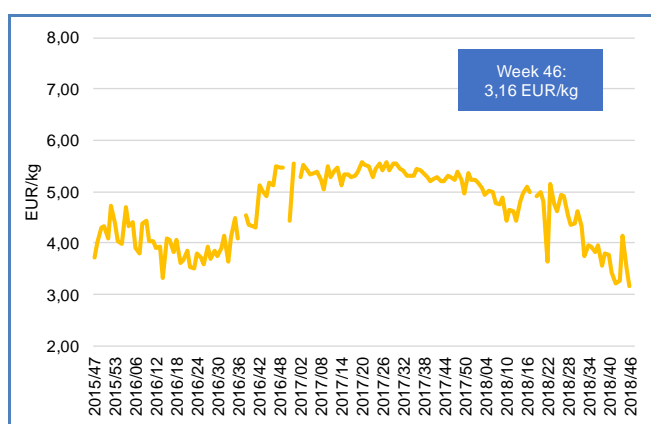


Source: European Commission (updated 06.12.2018).

The price of fresh **plaice** (*Pleuronectes platessa*, CN code 03022200) imported from **Iceland** was 3,01 EUR/kg in **week 47**, up by 7% from the previous week. Volume was up slightly, by 3%. Thus far in 2018, this price has averaged 13% higher (2,54 EUR/kg) than the average during the same period in 2017 (2,24 EUR/kg). Volume in 2018 has averaged 64% higher than the average weekly volume in 2017.

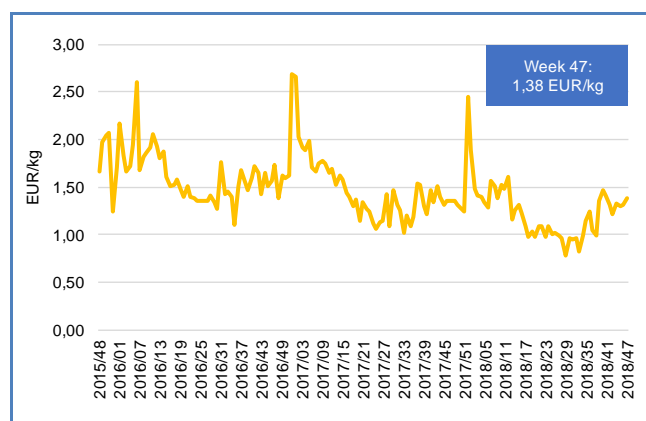
For frozen fillets of **Nile perch** (*Lates niloticus*, CN code 03046300) imported from **Tanzania**, the price during the last three years has followed a long wavelike trend. The price in **week 46** (the latest data available) of 3,16 EUR/kg was the lowest during the three-year period of review and is the latest low in a period of irregular decline from steadier prices that averaged 5,49 EUR/kg during weeks 20-30 of 2017. At the opposite, the average weekly volume in 2018 was about 10% greater than the volume registered during the same period in 2017.

Figure 38. **IMPORT PRICE OF NILE PERCH, FROZEN FILLETS FROM TANZANIA**



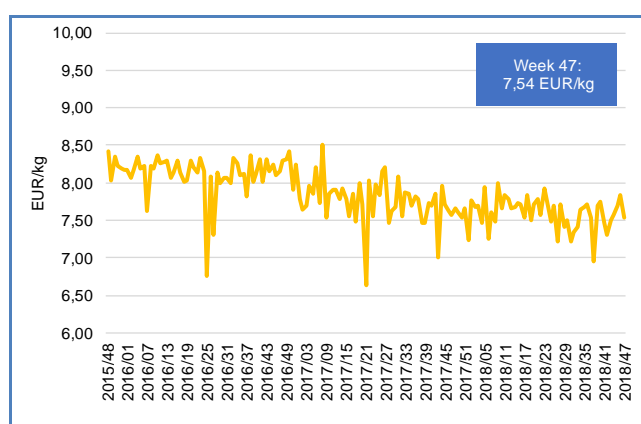
Source: European Commission (updated 06.12.2018).



Figure 39. **IMPORT PRICE OF FRESH COALFISH FROM NORWAY**

Source: European Commission (updated 06.12.2018).

The import price of smoked **trout** (*Salmo trutta*, *Oncorhynchus* spp., CN code 03034300) from **Turkey** was 7,54 EUR/kg in **week 47**, exactly the same level as the average of the previous ten weeks. Its relative stability is expected for a product with an extended shelf-life that is produced in controllable volumes, unlike wild-harvested fresh fish. The average weekly volume since 2015 is 75.023 tonnes, and in 2018 so far it has been 75.120 tonnes. As a result, there is minimal volatility in price, nor strong cyclical trends. There has been, however, a long-run decline in price, from an average of 8,14 EUR/kg in 2015 to 7,60 EUR/kg in 2018.

Figure 40. **IMPORT PRICE OF SMOKED TROUT FROM TURKEY**

Source: European Commission (updated 06.12.2018).

## 3 Consumption

### 3.1. HOUSEHOLD CONSUMPTION IN THE EU

In September 2018, consumption of fresh fisheries and aquaculture products decreased in most of the Member States surveyed compared with September 2017. The largest decrease in volume occurred in the UK (-18%) and in value in Sweden (-23%). However, in Ireland, Italy, and the Netherlands both volume and value increased. Only in Poland, did value increase (+2%), while volume declined (-5%). The highest increases were registered in Ireland (+10%) in value and in the Netherlands (+11%) in volume.

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

Country	Per capita consumption 2016* (live weight equivalent) kg/capita/year	September 2016		September 2017		August 2018		September 2018		Change from September 2017 to September 2018	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	24,7	597	8,92	557	8,22	539	7,85	516	7,63	7%	7%
Germany	13,9	5.218	73,06	5.445	75,34	4.551	70,72	4.889	72,52	10%	4%
Hungary	5,2	264	1,66	277	1,48	261	1,53	243	1,29	12%	13%
Ireland	23,0	1.300	18,35	1.074	15,48	982	14,68	1.185	17,10	10%	10%
Italy	31,1	29.873	244,24	30.396	252,96	28.913	249,74	32.293	267,61	6%	6%
Netherlands	21,0	3.810	46,35	3.380	42,35	2.596	36,42	3.478	46,87	3%	11%
Poland	14,5	4.063	21,80	3.801	21,52	2.817	17,41	3.602	21,91	5%	2%
Portugal	57,0	4.975	30,44	4.607	29,65	4.834	31,37	4.197	27,89	9%	6%
Spain	45,7	54.069	391,72	54.930	415,97	42.322	322,23	47.469	357,06	14%	14%
Sweden	26,4	735	10,60	756	11,16	734	11,32	660	8,64	13%	23%
UK	23,7	28.701	293,29	28.260	285,35	27.844	291,86	23.071	236,07	18%	17%

Source: EUMOFA, based on Europanel (updated 14.12.2018).

\*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](http://eumofa.eu/documents/20178/132648/EN_The+EU+fish+market+2018.pdf)

In the month of September for the past three years, household consumption of fresh fisheries and aquaculture products has been above the annual average in both volume and value in Italy (+9% and +7%, respectively) and the Netherlands (+32% and +24%). In Spain, household consumption in September was 2% above the average in value; however, volume was 2% below. In Ireland both volume and value remained at the average level and in the rest of the Member States surveyed, they were below the annual average.

### 3.2. Fresh flounder

**Habitat:** a demersal, benthic flatfish living on shallow soft bottoms down to 55 m<sup>11</sup>.

**Catch area:** from the White Sea in the Eastern Atlantic, south to the Mediterranean and Black seas<sup>12</sup>.

**Main producing countries in Europe:** Poland, Denmark, the Netherlands, Latvia.

**Production method:** caught.

**Main consumers in the EU:** Denmark, Sweden, the Netherlands.

**Presentation:** whole, filleted.

**Preservation:** fresh, frozen, steamed, fried, baked.



#### 3.2.1 General overview of household consumption in Sweden

Sweden is among the EU countries with high per capita consumption of fisheries and aquaculture products. In 2016, Sweden registered per capita consumption of 26,4 kg, 9% higher than the EU average of 24,3 kg. Compared with the per capita consumption in Portugal of 57 kg (which was the highest in the EU), Sweden's consumption was 54% lower. However, the per capita consumption of fisheries and aquaculture products remained unchanged in 2016 compared with the previous year. See more on per capita consumption in the EU in table 3.

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

**First sales:** Estonia (3/2018), Latvia (3/2018, 10/2015), Lithuania (3/2018, 6/2016, 2/2015, 1/2014), Sweden (7/2015, May 2013).

**Consumption:** Sweden (7/2016).

#### 3.2.2 Consumption trend in Sweden

**Long-term trend, January 2015–September 2018:** decreasing in volume and increasing in price.

**Yearly average price:** 12,02 EUR/kg (2015), 12,82 EUR/kg (2016), 13,57 EUR/kg (2017).

**Total yearly consumption:** 357 tonnes (2015), 345 tonnes (2016), 328 tonnes (2017).

**Short-term trend, January–September 2018:** decreasing in volume and increasing in price.

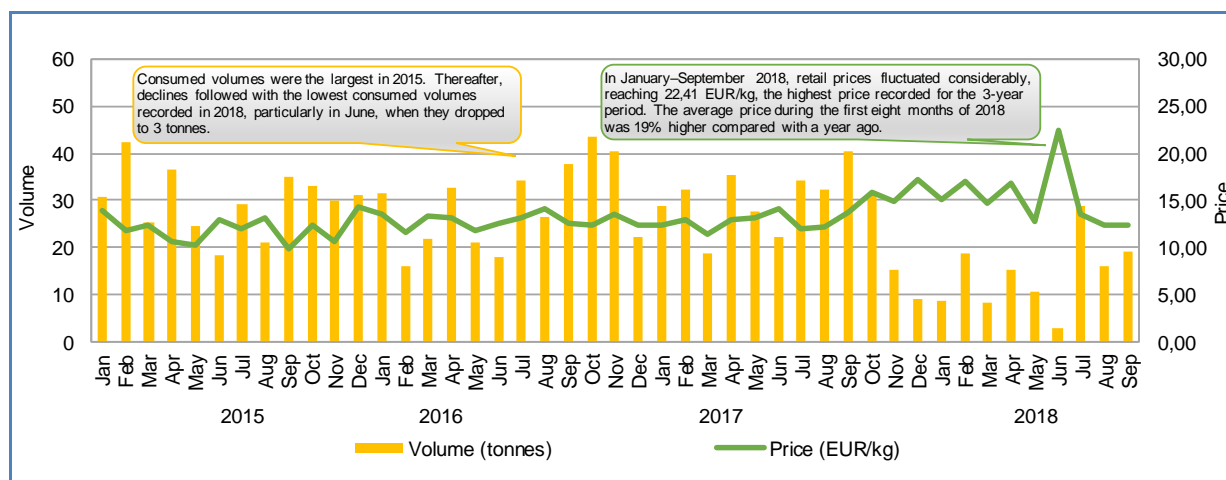
**Average price:** 15,19 EUR/kg.

**Total consumption, January–September 2018:** 128 tonnes.

<sup>11</sup> <http://eumofa.eu/documents/20178/106790/MH+8+2017+EN.pdf>

<sup>12</sup> <http://www.fao.org/fishery/species/2550/en>

Figure 41. RETAIL PRICE AND VOLUME SOLD OF FRESH FLOUNDER IN SWEDEN



Source: EUMOFA, based on Europanel (updated 14.12.2018).

## 4 Case study – Fisheries and aquaculture in New Zealand



Map of New Zealand.

Source: [www.orangesmile.com/travelguide/new-zealand/country-maps.htm](http://www.orangesmile.com/travelguide/new-zealand/country-maps.htm)

New Zealand is located in the south-west Pacific Ocean, with a population of approximately 4.9 million<sup>13</sup>. The country consists of two main Islands, the North and the South Island and it has a coastline that is over 15,000 km long, the ninth longest in the world. The seafood industry employs over 13,000 people, out of whom about 2,500 work in commercial fishing or aquaculture at sea<sup>14</sup>. New Zealand has an Exclusive Economic Zone (EEZ) of 200 nautical miles and 123 species are fished commercially. The indigenous people of New Zealand, the Maori, have about 50% of New Zealand's fishing quotas<sup>15</sup> and are guaranteed 20% of the quota for each new species entering the country's quota management system<sup>16</sup>.

New Zealand has been recognized for its sustainable fisheries, as several fisheries have received certification by the Marine Stewardship Council (MSC)<sup>17</sup>. According to the Ministry for Primary Industries, of the 165 stocks scientifically evaluated in 2017 (which represent 78% of the total catch in value and 71% in volume), 138 are sustainable (above the "soft" limit) and 27 below the soft limit<sup>18</sup>. Below the soft limit a fish stock is considered to be overfished or depleted and needs to be actively rebuilt<sup>19</sup>. The main species caught in New Zealand are blue grenadier (also known as "hoki"), squid, mackerel, snoek and southern blue whiting. In 2016, the country's total catch from fisheries was 425,000 tonnes, with marine fish dominating the industry. Catches of crustaceans are mainly red rock lobster and New Zealand lobster that are exported live to Asian markets.

New Zealand is also known for its aquaculture production of mussels and chinook salmon (or king salmon). The country also has some aquaculture production of abalone which is known for having a high value in Asian markets.

Table 4. **CATCHES IN NEW ZEALAND (volume in 1000 tonnes)**

Species	2000-2005 average	2006-2011 average	2012	2013	2014	2015	2016
Marine Fish	491	394	397	408	418	407	370
Molluscs	63	57	39	30	20	21	48
Crustaceans	4	4	4	4	4	4	4
Other	1	1	2	2	2	2	3
<b>Total</b>	<b>559</b>	<b>455</b>	<b>442</b>	<b>444</b>	<b>443</b>	<b>433</b>	<b>425</b>

Source: FAO.

<sup>13</sup> <https://www.stats.govt.nz/indicators/population-of-nz>

<sup>14</sup> <https://www.seafoodnewzealand.org.nz/industry/key-facts/>

<sup>15</sup> <https://www.seafoodnewzealand.org.nz/industry/key-facts/>

<sup>16</sup> <http://www.treaty2u.govt.nz/the-treaty-today/fisheries/index.htm>

<sup>17</sup> <https://fisheries.msc.org/en/fisheries/@search?q=new+zealand&search=>

<sup>18</sup> <https://www.mpi.govt.nz/growing-and-harvesting/fisheries/fisheries-management/fish-stock-status/>

<sup>19</sup> <https://www.mpi.govt.nz/growing-and-harvesting/fisheries/fisheries-management/fish-stock-status/>

## 4.1 Catches

In 2016, New Zealand had a total catch from fisheries at about 425.000 tonnes, a decline by 23% from 2000 but being relatively stable during the last five years.

Catches of blue grenadier accounted for 33% of the total in 2016. It is caught by trawling in fishing regions mainly off the South Island<sup>20</sup>. Approximately 10% of the total catch consisted of squid. The majority of squid fishing activities takes place from January to May in territories around the EEZ, using both trawlers and jigging vessels<sup>21</sup>.

Table 5. **CATCHES IN NEW ZELAND, MAIN SPECIES (1000 tonnes)**

Species	2000-2005 average	2006-2011 average	2012	2013	2014	2015	2016
Blue grenadier	182	104	128	132	149	157	140
Jack and horse mackerels	35	42	43	45	50	45	39
Southern blue whiting	29	32	30	33	32	25	23
Snoek	24	27	28	23	26	25	23
Wellington flying squid	54	52	35	25	15	16	43
Pink cusk-eel	19	14	15	14	15	15	15
Blue mackerel	10	10	10	9	6	11	9
Orange roughy	17	12	6	7	9	10	8
Other	188	163	146	157	141	132	125
<b>Total</b>	<b>559</b>	<b>455</b>	<b>442</b>	<b>444</b>	<b>443</b>	<b>433</b>	<b>425</b>

Source: FAO.

## 4.2 Aquaculture

Aquaculture production in New Zealand amounted to 109.016 tonnes in 2016, increasing by almost 20% with respect to 2015 and reaching almost the same level of 2014.

With 94.037 tonnes, production of green mussel (also known as New Zealand mussel) covered 86% of total aquaculture in 2016. The most common farming method for the species is the culture on ropes. The mussels reach market size in 12–18 months.

Production of chinook salmon has averaged 12.130 tonnes in the last five years, with a drop in 2014 to less than 11.000 tonnes. New Zealand is the world largest producer of this species, and the industry uses traditional methods for its farming, which means that production starts in land-based hatcheries and after growing to a certain size the fish are transferred to net pens in the sea to continue growing. Production is located in the areas of Marlborough Sounds, north of the South Island, around Stewart Island on the south end of the South Island and also in Akaroa Harbour on the east side of the South Island<sup>22</sup>.

<sup>20</sup> <http://deepwatergroup.org/species/hoki/>

<sup>21</sup> <https://fs.fish.govt.nz/Page.aspx?pk=5&tk=1&fpid=48>

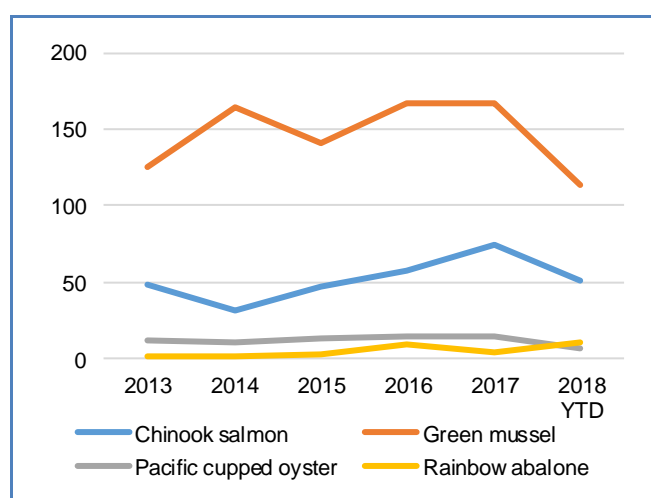
<sup>22</sup> <https://www.aquaculture.org.nz/industry/king-salmon/>



Table 6. **AQUACULTURE PRODUCTION IN NEW ZEALAND (volume in tonnes)**

Species	2012	2013	2014	2015	2016
Green mussel (New Zealand mussel)	86.447	83.561	97.438	76.811	94.037
Chinook salmon	12.397	11.988	10.840	12.474	12.943
Pacific cupped oyster	1.216	1.497	1.509	1.909	1.946
Rainbow abalone	101	77	87	81	90
<b>Total</b>	<b>100.161</b>	<b>97.123</b>	<b>109.874</b>	<b>91.275</b>	<b>109.016</b>

Source: FAO.

Figure 42. **EXPORT VALUE OF SPECIES FARMED IN NEW ZEALAND (value in million EUR)**

Source: FAO.

\* Data for 2018 are available up to September.

Rainbow abalone, which is produced in relatively small volumes, has a very high export value. In 2017, chilled abalone was exported at 41,48 EUR/kg and frozen abalone at 35,65 EUR/kg. Abalone is mainly exported to China, Australia and Hong Kong.

### 4.3 Processing

The different species caught or/and farmed in New Zealand are preserved and processed differently before being exported.

Blue grenadier is commonly processed on board, either into frozen blocks or into fillets, the latter achieving a higher market value. Mussels are either canned, frozen or put in vacuum, or in the half-shell. Rock lobster is mainly exported live to China, with small volumes being frozen.

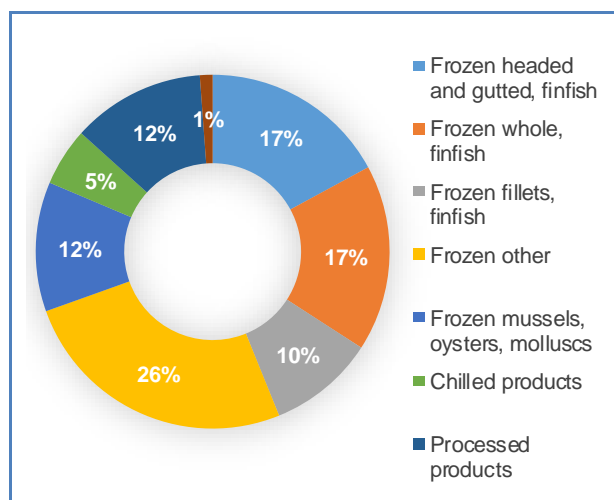
Salmon is subject to both primary and value-added processing. Salmon is processed and packaged into varying formats to be sent to market in either chilled or frozen format. The most popular product forms include whole salmon and salmon fillets as well as smoked salmon using either hot or cold natural wood smoking methods<sup>23</sup>.

<sup>23</sup> <http://www.nurturedseafood.com/nz-king-salmon/traceability/processing/>

In 2017, 82% of the seafood export from New Zealand consisted of frozen products. Finfish that is exported as frozen whole products, headed and gutted or in fillets, made up 60% of the total. Frozen mussels, oysters and molluscs accounted for 12% of the total.

Processed products (such as smoked, dried and canned) represented 12% of the total, while another 5% included chilled products and 1% was exported live.

Figure 43. **SEAFOOD EXPORTS FROM NEW ZEALAND BY PRESERVATION STATE (volume in 1000 tonnes)**



Source: EUMOFA/EUROSTAT.

## 4.4 Trade

### Export

In 2017, New Zealand exported seafood to 113 different countries including EU Member States. Of them, 57 countries imported more than 1.000 tonnes of seafood from New Zealand. This demonstrates how New Zealand has effective transport routes and can reach markets all over the world despite its remote location in the south west Pacific.

The most popular species exported from New Zealand are blue grenadier and mackerel. Of the 59.000 tonnes of blue grenadier exported in 2017, the largest amounts were destined to China (23.600 tonnes), Australia (10.400 tonnes) and Poland (6.200 tonnes). Mackerel is mainly exported to China (6.800 tonnes), Cameroon (5.600 tonnes) and Mozambique (3.300 tonnes). This mainly comprises jack mackerel, exported at 1,01 EUR/kg in 2017.

Mussels are mainly exported to the United States (10.000 tonnes), the EU (6.000 tonnes) and China (4.800 tonnes), at an average export price of 4,67 EUR/kg in 2017.

One of the most valuable species exported by New Zealand is rock lobster, reaching a price of 63,70 EUR/kg in 2017. This was a decline of 13% from 2016 when the price was 72,10 EUR/kg. Nearly all of the rock lobster exports from New Zealand in 2017 went to China.

Table 7. **SEAFOOD EXPORTS FROM NEW ZEALAND BY SPECIES** (volume in 1000 tonnes and value in million EUR)

Species	2014		2015		2016		2017	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Blue grenadier (hoki)	57	133	55	131	56	133	59	141
Mackerel	43	51	46	48	40	38	44	45
Mussels	33	165	28	141	33	167	36	167
Barracouta	15	14	17	17	14	17	18	25
Squid	14	28	15	26	38	73	17	50
Southern blue whiting	17	15	13	12	8	7	12	12
Ling	6	31	5	30	6	34	7	41
Skipjack tuna	15	13	16	13	6	7	6	8
Salmon	3	29	3	38	4	46	5	59
Orange roughy	3	24	5	34	5	39	5	33
Rock lobster	3	175	3	192	3	206	3	173
Albacore tuna	2	5	2	6	2	6	2	7
Other	83	317	81	339	77	349	83	342
<b>Total</b>	<b>292</b>	<b>1.001</b>	<b>290</b>	<b>1.027</b>	<b>292</b>	<b>1.124</b>	<b>296</b>	<b>1.102</b>

Source: Seafood New Zealand ([www.seafood.org.nz/publications/export-information/](http://www.seafood.org.nz/publications/export-information/)).Table 8. **SEAFOOD EXPORTS FROM NEW ZEALAND BY DESTINATION** (volume in 1000 tonnes, value in million EUR)

Market	2014		2015		2016		2017	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
China	74	292	74	325	78	361	73	333
Australia	34	148	33	141	34	157	35	150
United States	17	116	16	126	19	145	21	141
Japan	19	65	19	65	19	71	20	70
South Korea	12	28	13	30	10	33	13	31
South Africa	8	7	11	12	10	13	13	16
Spain	7	24	7	27	10	34	9	31
Russia	8	16	6	10	4	10	7	14
Other	115	306	111	291	107	301	106	315
<b>Total</b>	<b>292</b>	<b>1.001</b>	<b>290</b>	<b>1.027</b>	<b>292</b>	<b>1.124</b>	<b>296</b>	<b>1.102</b>

Source: Seafood New Zealand ([www.seafood.org.nz/publications/export-information/](http://www.seafood.org.nz/publications/export-information/)).

## Exports to the EU

New Zealand exported 41.000 tonnes of seafood with a value of EUR 147 million to the EU in 2017. Blue grenadier was the most common species exported, mainly as frozen fillets or frozen fillet blocks destined to Poland, France and Germany.

Exports of 6.000 tonnes of mussels with a value of EUR 30 million were shipped to 19 EU Member States in 2017. Spain (880 tonnes), Portugal (720 tonnes) and the UK (688 tonnes) imported the largest volumes.

Of New Zealand's squid exports, 77% was destined to Greece and 9% to Spain.

In 2017, New Zealand exported 98% of ling to Spain and Portugal, where the species is popular.

Table 9. **EXPORTS FROM NEW ZEALAND TO THE EU BY SPECIES** (volume in 1000 tonnes and value in million EUR)

Species	2015		2016		2017	
	Volume	Value	Volume	Value	Volume	Value
Blue grenadier (hoki)	13	42	16	47	16	49
Mussels	5	28	6	35	6	30
Squid	4	7	14	28	5	16
Ling	2	9	2	11	4	18
Hake	3	3	1	3	2	5
Albacore tuna	1	3	1	3	1	4
Other	7	34	6	20	8	24
<b>Total</b>	<b>36</b>	<b>126</b>	<b>46</b>	<b>148</b>	<b>41</b>	<b>147</b>

Source: Seafood New Zealand ([www.seafoodnewzealand.org.nz/publications/export-information/](http://www.seafoodnewzealand.org.nz/publications/export-information/)).

Table 10. **EXPORTS FROM NEW ZEALAND TO THE EU BY DESTINATION** (volume in 1000 tonnes and value in million EUR)

Market	2015		2016		2017	
	Volume	Value	Volume	Value	Volume	Value
Spain	7	27	10	34	9	31
Poland	4	13	7	22	6	21
France	7	21	6	15	6	16
Germany	4	18	5	22	5	20
Portugal	2	9	2	11	4	15
Greece	2	4	5	11	3	10
Other	9	34	11	34	8	34
<b>Total</b>	<b>36</b>	<b>126</b>	<b>46</b>	<b>148</b>	<b>41</b>	<b>147</b>

Source: Seafood New Zealand ([www.seafoodnewzealand.org.nz/publications/export-information/](http://www.seafoodnewzealand.org.nz/publications/export-information/)).

## Imports from the EU

New Zealand imports some volumes of seafood from the EU, amounting to 23.000 tonnes in 2017. This mainly included 11.100 tonnes of prepared “other cuts” of tuna and “other marine fish”, and 5.100 tonnes of frozen whole products.

Since 2009, when New Zealand imported 60.000 tonnes of seafood from EU Member States, volumes have decreased each year, especially for “other marine fish” and “other cephalopods”. On the other hand, tuna imports have been stable through the period.

Table 11. **IMPORTS IN NEW ZEALAND FROM THE EU BY SPECIES** (volume in 1000 tonnes and value in million EUR)

Species	2015		2016		2017	
	Volume	Value	Volume	Value	Volume	Value
Other marine fish	14	31	6	16	6	15
Miscellaneous tuna	5	18	5	18	5	19
Miscellaneous shrimps	2	19	3	26	3	29
Other cephalopods	8	16	8	19	2	8
Other	18	59	7	26	7	31
<b>Total</b>	<b>47</b>	<b>143</b>	<b>29</b>	<b>105</b>	<b>23</b>	<b>103</b>

Source: EUMOFA/EUROSTAT.

## 4.5 Consumption

With a population of only 4,9 million people<sup>24</sup>, the domestic consumption of seafood in New Zealand is not very significant, even though it is an island nation. This can perhaps be explained by its British heritage, as the migrants from Europe had a diet consisting of beef and sheep as their protein source. Immigrants from Asia have brought seafood traditions, but most New Zealanders still only eat small amounts of fish<sup>25</sup>.

However, during the last 30 years, seafood has become more popular among New Zealanders. For the Maori, seafood has always been an important part of their diet<sup>26</sup>. Orange roughy and blue grenadier are the main species consumed.

Seafood consumption is also influenced by tourists, as about 3,7 million people visited New Zealand in 2017<sup>27</sup>.

<sup>24</sup> <https://www.stats.govt.nz/indicators/population-of-nz>

<sup>25</sup> <https://teara.govt.nz/en/seafood>

<sup>26</sup> <https://nzhistory.govt.nz/culture/no-pavlova-please/seafood-consumption>

<sup>27</sup> <https://www.stats.govt.nz/information-releases/international-travel-and-migration-december-2017>

## 5 Case study – Digitalisation in the EU fish and seafood market

As in other economic sectors, the basic trend of digitalisation currently affects also the fisheries and aquaculture market. The purpose of this case study is to highlight two of the main changes that digitalisation has caused in the fish and seafood supply chain in the EU: digitalisation of sales in fish auctions and online shops, and marketplaces for wholesalers and final consumers.

### 5.1 First sales in fish auctions: web-based sales

Electronic auctions and real time security deposit follow-up allow remote web-based access to electronic auctions. Such services are already provided, especially in Belgian, Dutch and French fish auction markets. In France, two-thirds of sales in auctions are web-based<sup>28</sup>. RFID-based (Radio Frequency Identification) smart boxes/crates allow for complete traceability. For example, French fishing ports are installing such devices along the value chain from vessel to market. Following landings, blockchain technology could secure remote payments in the future and better connect stakeholders along the value chain<sup>29</sup>.

The development of electronic auctions differs across the EU Member States. While in France the distance selling is becoming the dominant model for trade in fisheries and aquaculture products, it is still marginal in other countries (e.g. Denmark and Spain). In Spain, for instance, electronic auctions tend to be in place in smaller auctions, not centrally located and operate mainly with small-scale coastal fishermen, while the main auctions continue to operate only with buyers being physically present on site.

At the EU level, the Pan European Fish Auctions (Pefa) was created ten years ago and constitutes an auction system for remote purchase in Denmark (four fish auctions involved), Sweden (two), the Netherlands (seven), Belgium (one) and Italy (six). This system involves most of the main Dutch fish auctions and over 400 vessels in the EU. The buyers have to be accredited, but do not need to be physically present at the auction site. They can have access to fish sales in all involved auctions on Pefa's website or by using the dedicated mobile app, the "Pefa auction clock".

Figure 44. PEFA AUCTION CLOCK, MOBILE APP FOR FISH BUYERS



Source: Pefa.com.

The result is that buyers from the comfort of their office can buy fish from their office at several fish auctions at the same time. In France, despite the decreasing trend affecting first-sales volumes at auctions in recent years, the number of buyers has increased as the access to sales had been digitalized. In 2016, though they still accounted for the largest share in first-sales value, fish wholesalers, who traditionally used to represent most of the operators buying at fish auctions, accounted for only 25% of operators buying at French auctions. For fishmongers it was

<sup>28</sup> <https://www.ouest-france.fr/bretagne/quimper-29000/assises-de-la-peche-la-vente-distance-une-tendance-nationale-5256792>

<sup>29</sup> [https://www.oecd.org/greengrowth/GGSD\\_2017\\_Issue%20Paper\\_New%20technologies%20in%20Fisheries\\_WEB.pdf](https://www.oecd.org/greengrowth/GGSD_2017_Issue%20Paper_New%20technologies%20in%20Fisheries_WEB.pdf)



50%. This contributed to a higher pressure on sales and this, combined with decreasing supply, has caused a significant increase in average first-sale prices<sup>30</sup>.

In addition, in France, buyers can have access to supply previsions for all 34 French fish auctions. The landing previsions are communicated by fishing vessels to auctions and these data are centralized and harmonized by the national fish auctions' association. This allows buyers to receive a real-time overview on a daily basis on what is going to be landed. This information is used as a tool for decision-making in their buying strategy. Currently, the supply prevision data are provided by email as a newsletter to which buyers can subscribe. However, the objective for the coming years is to set an online portal<sup>31</sup>.

Pefa is also interested in providing advice and services to non-EU countries, where transparency of fish first sale is a significant factor due to socio-economic but also environmental reasons. They see the digitalisation of fish sales as a tool that can support governments to monitor and manage fisheries, taking pressure off the resources through regulation<sup>32</sup>.

## 5.2 Online retail/wholesale market

At present, about 85% of Europeans have internet access compared to 55% in 2007<sup>33</sup>. E-shopping has become increasingly widespread in the EU as consumers appreciate the advantages such as being able to shop anytime and anywhere, having access to a broader range of products and being able to compare prices easily.

According to an EU survey carried in 2016, one out of four e-shoppers buy food or groceries, making food products the 5<sup>th</sup> product category after clothes and/or sports goods, travel and holiday accommodation, household goods and tickets for events. Over the last 10 years, the share of e-shoppers in the EU increased for all age groups, but most notably for younger internet users aged 16 to 24 years<sup>34</sup>.

With a 5,6% value share, Europe is the world's second market for grocery e-commerce behind Asia. In the UK and France, retailers have successfully responded to the consumer switch to online shopping of grocery whereas other major markets, like Germany, have not experienced this transition to a comparable extent. The most popular format options are home delivery and click-and-collect systems (where shoppers pick up the goods at the shops).

Traditionally, the fish market supply chain involves a large number of intermediate operators from first sale to final consumer. The fisherman sells his landings at the fish auction to wholesalers who ship and sell them in wholesale markets or directly to the retailers, buyers or restaurants. Most of these operations are still done by phone or fax. Thus, the emerging e-commerce landscape represents a great opportunity to market and sell fish and seafood, especially for younger generations and consumers living far from the coasts.

A few examples of business development in the fish and seafood sector in the EU are provided for the Spanish and French markets.

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<sup>30</sup> <http://pdm-seafoodmag.com/lactualite/detail/items/ventes-en-criees-moins-de-poisson-plus-dacheteurs.html>

<sup>31</sup> <http://www.lemarin.fr/secteurs-activites/peche/30134-previsions-dapports-lassociation-des-criees-prend-le-relais>

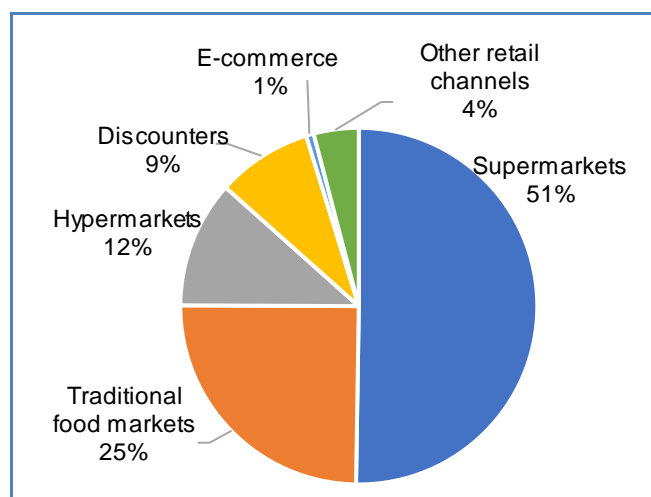
<sup>32</sup> <https://www.undercurrentnews.com/2018/02/06/dutch-online-fish-auction-eyes-potential-to-improve-transparency-in-developing-countries/>

<sup>33</sup> <https://www.foodnavigator.com/Article/2017/12/19/E-Commerce-trends-in-Europe-facts-and-figures>

<sup>34</sup> <https://ec.europa.eu/eurostat/cache/infographs/ict/bloc-2a.html>

## Spain

Figure 45. **VOLUME SHARE OF DIFFERENT RETAIL CHANNELS FOR SALES OF FISH AND SEAFOOD PRODUCTS IN SPAIN IN 2017**



Source: Statista<sup>35</sup>.

In Spain, food and groceries online purchases have experienced a significant growth in recent years, though still being marginal compared to other marketing channels. According to a statistical study that analysed fish and seafood sales at retail stage in 2017, the e-commerce accounted for less than 1% of total volume sold.

In Galicia, however, online sales of fish and seafood experience a +20% growth each year. This growth is mainly attributed to sales through online fishmongers like Mariskito, Sal y Laurel or Del mar al plato. They are often a complementary activity for traditional fish and seafood business companies and target in particular the foodservice sector<sup>36</sup>.

## France

In France the digital overturning has slightly impacted the fish and seafood market in recent years with several interesting examples of business initiatives.

The French-Swiss start-up Procsea offers an online marketplace for fish and seafood products, connecting fishermen or wholesalers and restaurants/buyers. Since 2016, the company has experienced a +30% growth each month<sup>37</sup>. The company deals with logistics, fish collecting and shipping, and, if necessary, customs formalities. According to their manager, this market is estimated at EUR 54,3 billion in the EU<sup>38</sup>.

The French company Poiscaille provides a sourcing and delivery service of fresh fish boxes directly from fishing vessels to consumers. The objective is to sell various species, sustainably exploited and caught with passive gears and in accordance with fishing seasonality. On a monthly basis, about 2.000 boxes are sold and delivered to 1.000 subscribers. In addition, the company supplies about 40 restaurants in Paris.

There are also other initiatives at local level. For example, a fishing company in Normandy, owning several vessels, has developed an online shop service to sell some of its products directly to consumers, in partnership with a logistic company, specialized in delivering chilled boxes<sup>39</sup>.

However, shipping costs and quality constraints are still significant challenges to be faced for these companies, affecting the final consumer price. The development of online shops and drive service by traditional fishmongers can also be a good opportunity especially for ready-to-eat products like cooked shellfish and crustaceans.

<sup>35</sup> <https://es.statista.com/estadisticas/491407/volumen-de-ventas-de-pescado-en-espana-por-canal-de-distribucion/>

<sup>36</sup> <https://www.diariodepontevedra.es/articulo/pontevedra/venta-internet-marisco-pescado-fresco-galicia-crece/201811041929251007758.html>

<sup>37</sup> <https://www.usine-digitale.fr/article/des-filets-a-l-assiette-en-passant-par-le-net-procsea-une-marketplace-dediee-aux-produits-de-la-mer.N580623>

<sup>38</sup> <https://www.usine-digitale.fr/article/une-seconde-levee-de-fonds-de-2-5-m-pour-procsea.N694654>

<sup>39</sup> [https://actu.fr/normandie/cherbourg-en-cotentin\\_50129/du-poisson-frais-cherbourg-vendu-sur-internet-livre-partout-france\\_20113435.html?fbclid=IwAR1a0KZr\\_39IO9EATd0IYxQ9IU7k6CVKcVpLHiSSskEf9qcpsDpdEP6oe5w](https://actu.fr/normandie/cherbourg-en-cotentin_50129/du-poisson-frais-cherbourg-vendu-sur-internet-livre-partout-france_20113435.html?fbclid=IwAR1a0KZr_39IO9EATd0IYxQ9IU7k6CVKcVpLHiSSskEf9qcpsDpdEP6oe5w)

## Italy

In Italy the project Ittico, Mercato Telematico Sperimentale (Experimental Telematic Market), intends to become a platform enabling all sector operators to sell their goods to restaurateurs, and consumers to buy and bargain prices for fisheries products<sup>40</sup>.

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<sup>40</sup> <http://www.gamberorosso.it/en/food-news/1046786-ittico-an-avant-garde-e-market-for-fish-and-aquaculture>

## 6 Global highlights

**EU / Fisheries:** In November 2018, the European Commission adopted rules within the Guidelines for the examination of State Aid to the fisheries and aquaculture sector in the outermost regions of the EU. The new measures will allow Member States to offer support for the renewal of the small-scale fishing fleet while fishing sustainably in the nine outermost regions. The aim is to facilitate fleet renewal in order to increase the safety of fishers, ensure food supplies, and allow the fisheries sector to play an important role in the development of the regions<sup>41</sup>.



**EU / Western Waters / Fisheries:** The Multiannual Plan for fisheries in the Western Waters has been adopted by the European Parliament and the European Council. The agreement will help restore and maintain stocks at sustainable levels, while ensuring social and economic viability for the fishermen operating in the region. The plan concerns the fleets of Belgium, Germany, France, Ireland, Spain, Portugal and the UK in this part of the Atlantic Ocean and its adjacent waters. The Western Waters plan covers fisheries for species from the North and West of Scotland over the Gulf of Cadiz down to Madeira in the South<sup>42</sup>.

**EU / Norway / The Faroe Islands / Fisheries:** The EU, Norway and the Faroe Islands have signed a tripartite agreement setting the Total Allowable Catch (TAC) for Northeast Atlantic mackerel for 2019 at 653.438 tonnes, a 20% reduction from the TAC in 2018<sup>43</sup>.

**ICCAT / Sustainable Fisheries:** In November 2018, the International Commission for the Conservation of Atlantic Tunas (ICCAT) agreed on a reviewed multi-annual management plan for bluefin tuna. The Commission agreed to roll over current measures for tropical tunas and to work in advance of the 2019 Commission meeting to develop a new plan acceptable to all stakeholders. The Commission also approved new recommendations on reporting formats for the implementation of billfish and shark management measures, as well as measures for the development of the IUU fishing vessel list, port State measures and Vessel Monitoring System (VMS)<sup>44</sup>.

**Iceland / Supply:** The overall catch of Icelandic vessels in October was 113.656 tonnes, nearly the same as in October 2017. Demersal catch was just 46.000 tonnes, 8% more than in the same month last year. The pelagic catch was 64.000 tonnes, a decline of 6%. The pelagic catch consisted mostly of herring which totalled at 59.000 tonnes<sup>45</sup>.

**Peru / Fishmeal / Supply:** The anchovy landing for the marine ingredients industry (fishmeal and fish oil) registered in November 2018 was the highest since 2013. This result was due to the good rate of catches obtained since the beginning of 2018<sup>46</sup>.

**Spain / Aquaculture:** Andalusian aquaculture generated 909 jobs last year, 21% more than in 2016, when 715 jobs were created. The total number of hectares destined to the aquaculture activity in Andalusia is 8.618, of which 7.698 hectares correspond to Natura Network 2000 spaces, representing almost 90% of the activity located in these areas<sup>47</sup>.

**Ireland / IUU:** At the Sustainable Blue Economy Conference in Nairobi, Ireland pledged EUR 32 million in funding for the fight against Illegal, Unreported, and Unregulated (IUU) fishing in the next year. Among commitments to be made is an upgrade of the national naval service technology infrastructure to support the Irish fisheries resources protection programme<sup>48</sup>.

<sup>41</sup> [https://ec.europa.eu/fisheries/press/outermost-regions-commission-adopts-new-rules-develop-sustainable-fisheries\\_en](https://ec.europa.eu/fisheries/press/outermost-regions-commission-adopts-new-rules-develop-sustainable-fisheries_en)

<sup>42</sup> [https://ec.europa.eu/fisheries/press/agreement-commission-proposal-multi-annual-fisheries-management-plan-western-waters\\_en](https://ec.europa.eu/fisheries/press/agreement-commission-proposal-multi-annual-fisheries-management-plan-western-waters_en)

<sup>43</sup> <https://www.regjeringen.no/contentassets/c1a2a09188df49ba9ab4903b494b4687/faroe-islands-eu-norway-extension-2014-2020.pdf>

<sup>44</sup> [https://www.iccat.int/Documents/Meetings/COMM2018/PRESS\\_RELEASE\\_ENG.pdf](https://www.iccat.int/Documents/Meetings/COMM2018/PRESS_RELEASE_ENG.pdf)

<sup>45</sup> <https://www.statice.is/publications/news-archive/fisheries/fish-catches-in-october-2018/>

<sup>46</sup> <https://www.fis.com/fis/worldnews/worldnews.asp?l=e&country=0&special=&monthyear=&day=&id=100565&ndb=1&df=0>

<sup>47</sup> <https://www.fis.com/fis/worldnews/worldnews.asp?monthyear=12-2018&day=1&id=100567&l=e&country=0&special=&ndb=1&df=0>

<sup>48</sup> <https://www.capitalfm.co.ke/news/2018/11/ireland-commits-e32mn-in-efforts-to-fight-illegal-fishing/>

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**FOR MORE INFORMATION AND COMMENTS:**

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

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

**First sales:** European Commission, European Council, habitas.org, ICES, FAO, FishBase.

**Consumption:** EUROPANEL.

**Case studies:** FAO, New Zealand National Statistics, Seafood New Zealand, Marine Stewardship Council, Treaty 2 U New Zealand, Fisheries New Zealand, Deep Water Group, Aquaculture New Zealand, Nurture Seafood New Zealand, EUROSTAT, Te Ara – The Encyclopedia of New Zealand, New Zealand History, Pan European Fish Auctions (PEFA), OECD, Ouest-France, Produits de la mer, Le Marin France, Undercurrent News, Food Navigator, Statista, Diario de Pontevedra, Usine Digitale, Actu France, Gambero Rosso.

**Global highlights:** European Commission, European Council, ICCAT, Statistics Iceland, fis.com.

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](http://www.eumofa.eu).