

Monthly Highlights

No. 2 / 2019

EUMOPA

European Market Observatory for
Fisheries and Aquaculture Products

In this issue

In December 2018, first-sales value and volume grew in Italy, Lithuania, Portugal, Sweden, and the UK over December 2017. In the same period, they dropped in Belgium, Denmark, Estonia, France, Latvia, and the Netherlands.

In January 2016–December 2018, the highest average price of common shrimp was recorded in Belgium (8,52 EUR/kg), 18% higher than in Denmark and 16% more than the average price in the Netherlands. That of edible crab was the highest in France (3,69 EUR/kg), about 5% over the one in Denmark, and 69% over the average price in the UK.

The average price of prepared or preserved crab imported from Vietnam increased from 8,65 EUR/kg in 2016 to 9,68 EUR/kg in 2018. The average price in the first 4 weeks of 2019 was 9,58 EUR/kg.

In January–November 2018, the average price of fresh haddock for household consumption in Sweden was 13,52 EUR/kg, 18% higher than in Ireland (11,46 EUR/kg).

Brazil is the largest market for cod exported from the EU. In 2017, exports to the country reached 7.700 tonnes worth EUR 58 million, mainly coming from Portugal.

Seven out of ten Europeans (70% of respondents) eat fisheries and aquaculture products at home at least once a month.

In February 2019, the European Commission reached an agreement to establish a multi-annual plan for fish stocks in the Western Mediterranean Sea. The aim is to restore demersal fish stocks back to sustainable levels, ensuring long term viability of fishers.



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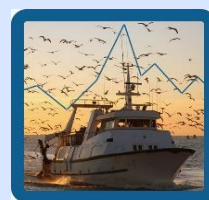
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1 First sales in Europe

In **January–December 2018**, 11 EU Member States (MS) and Norway reported first-sales data for 11 commodity groups¹. First-sales data are based on first-sales notes and data collected from auction markets.

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 mostly to increased sales of blue whiting (+85.062 tonnes).

Decreases in value and volume: In Belgium, France, Italy, Latvia, and the UK, decreases were registered in both value and volume. The most significant declines registered in Latvia due to lower harvests of sprat, which was responsible for 40% of total first-sales value and volume.

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

Country	January–December 2016		January–December 2017		January–December 2018		Change from January–December 2017	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
BE	16.179	62,84	16.425	66,18	14.289	60,27	-13%	-9%
DK	263.635	369,82	265.144	356,15	269.769	365,50	2%	3%
EE	48.723	11,53	47.483	11,03	48.393	11,95	2%	8%
FR	197.943	673,58	193.817	667,63	188.906	639,58	-3%	-4%
IT*	89.807	327,29	93.059	336,22	85.902	316,16	-8%	-6%
LV	52.555	11,20	57.815	11,53	48.493	8,67	-16%	-25%
LT	2.065	1,51	1.533	1,41	1.676	1,24	9%	-12%
NL	67.334	290,90	222.922	418,53	351.530	543,73	58%	30%
NO	2.413.057	2.157,58	2.688.986	2.074,89	2.807.392	2.155,19	4%	4%
PT	102.232	194,04	93.003	186,02	98.290	198,53	6%	7%
SE	105.531	85,57	87.403	67,50	124.815	70,41	43%	4%
UK	451.313	825,87	286.070	522,44	263.174	515,62	-8%	-1%

Source: EUMOFA (updated 14.02.2019); 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 December 2018

Increases in value and volume: First sales grew in Italy, Lithuania, Portugal, Sweden, and the UK. The increase was sharp in Portugal because of higher supply of highly valued octopus, whereas increases in the UK were due to higher harvests of crustaceans which include crab, Norway lobster and lobster *Homarus* spp. Sweden experienced a high increase in volume by 155% due to herring and sprat.

Decreases in value and volume: First sales dropped in Belgium, Denmark, Estonia, France, Latvia, and the Netherlands. The decreases were particularly high in Belgium and Denmark. In Belgium, it was due to the lower harvests of flatfish (common sole and European plaice). Denmark first-sales decreases were linked to lower supplies of herring and cod.

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

	December 2016		December 2017		December 2018		Change from December 2017	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
BE	1.605	5,28	1.878	7,11	1.277	5,16	-32%	-27%
DK	15.975	22,25	17.426	26,62	11.825	19,96	-32%	-25%
EE	4.884	1,15	5.182	1,07	4.797	0,89	-7%	-17%
FR	18.647	70,38	14.761	61,50	13.256	56,98	-10%	-7%
IT*	8.499	31,79	6.016	26,42	6.327	27,87	5%	5%
LV	5.018	1,10	4.194	0,77	3.975	0,65	-5%	-15%
LT	143	0,15	72	0,08	90	0,08	25%	2%
NL	5.118	25,08	24.097	38,98	22.361	36,25	-7%	-7%
NO	67.326	80,31	129.978	90,49	84.257	101,21	-35%	12%
PT	4.284	12,75	3.481	9,63	3.982	13,17	14%	37%
SE	6.214	5,73	4.662	4,62	11.880	4,78	155%	4%
UK	25.508	58,15	9.464	24,80	13.440	37,38	42%	51%

Source: EUMOFA (updated 14.02.2019.); volume data is reported in net weight.

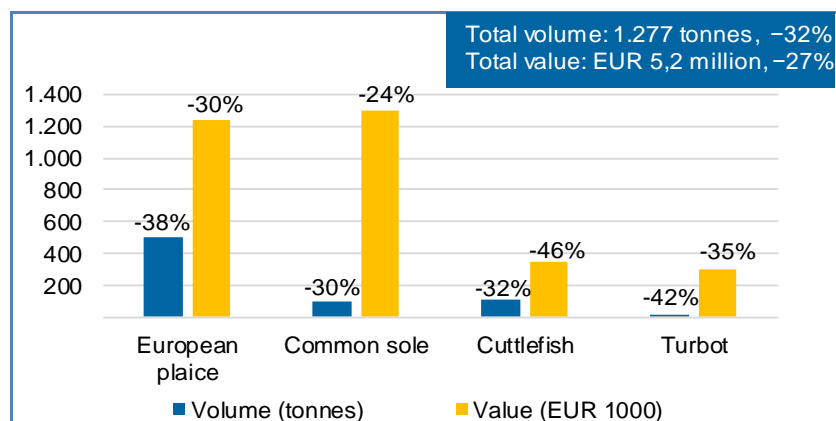
*Partial data. First-sales data for Italy covers 229 ports (approximately 50% of the total landings).

The most recent first-sales data for January **2019** available on the EUMOFA website can be accessed [here](#).

1.3 First sales in selected countries

 In **Belgium** in **January–December 2018**, first sales fell by 9% in value and 13% in volume, compared with 2017. This was mainly due to decreased sales of monk, common sole, turbot, and gurnard. In **December 2018**, both value and volume were lower compared with December 2017. European plaice, common sole, cuttlefish, and turbot were the main species responsible for such trends. Of the top valued species, the average price of cuttlefish declined by 21%, while that of European plaice increased by 12% – a consequence of a 38% decrease in volume.

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



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).


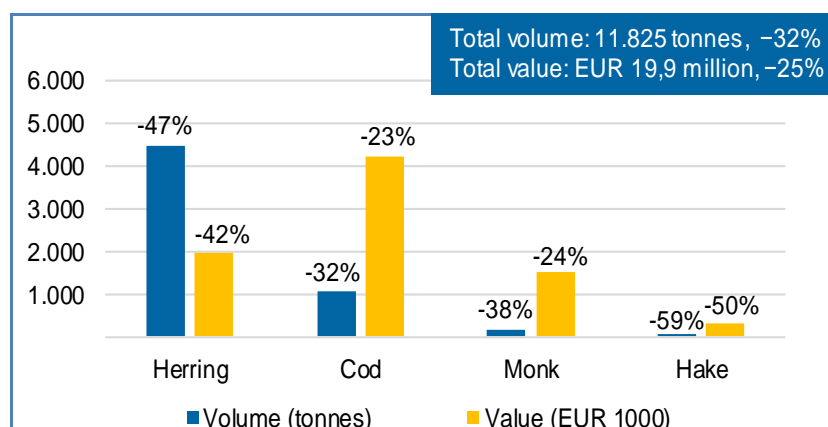
 In **Denmark** in **January–December 2018**, first-sales value increased by 3%, whereas volume slightly grew by 2%, compared to the same period in 2017. This was mostly due to an increase in first sales of mackerel, Norway lobster, and northern shrimp. In **December 2018**, both first-sales value and volume fell because of herring, cod, and monk. The average price of hake increased by 23% to 4,82 EUR/kg, while that of monk increased by 22% reaching 8,33 EUR/kg.

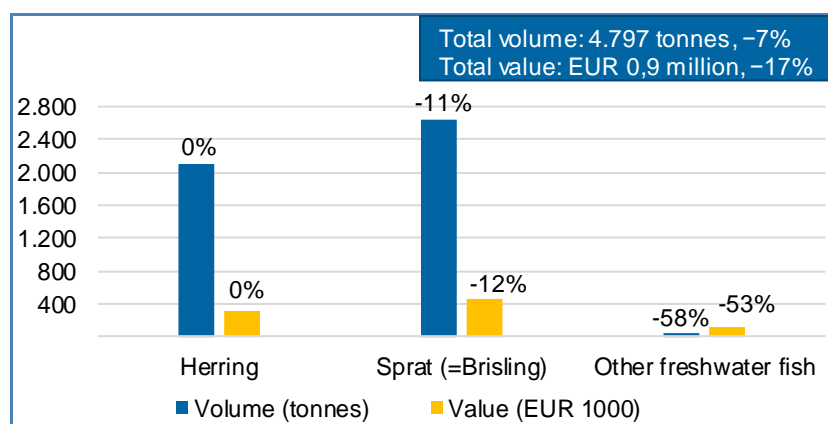
Figure 2. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN DENMARK, DECEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).

 In **January–December 2018**, **Estonia** saw growth in both first-sales value (+8%) and volume (+2%) over the same period a year before, mainly due to sprat (+29% in value and +8% in volume). In **December 2018** compared to December 2017, first sales shrank by 17% in value, whereas volume fell by 7%. This was due to a decrease in supply of sprat compared to December 2017. Herring first-sales average price remained stable at 0,15 EUR/kg, whereas that of sprat decreased slightly by 1% at 0,17 EUR/kg.

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



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).


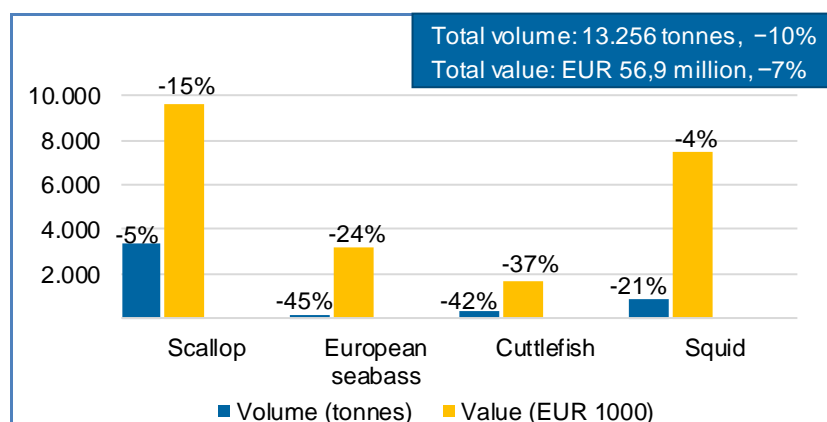
 In **France** in **January–December 2018**, first sales slightly decreased in both value (–4%) and volume (–3%) from January–December 2017. Lower supplies of Norway lobster, cuttlefish, hake, and scallop were the key factors for these trends. In **December 2018**, first-sales value and volume decreased due to scallop, European seabass, cuttlefish, and squid. Average prices of European seabass and scallop recorded increases by 39% (to 19,53 EUR/kg) and 21% (to 8,37 EUR/kg), respectively, whereas that of scallop went down by 10% to 2,82 EUR/kg.

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



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).


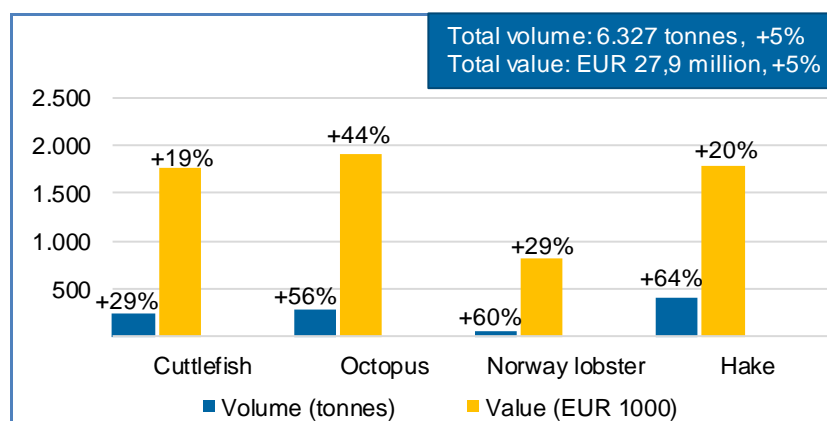
 In **Italy** in **January–December 2018**, first sales decreased by 6% in value and 8% in volume. The key species responsible for the first sales decline included clam, anchovy, and swordfish. In **December 2018**, both first-sales value and volume increased by 5% due to cuttlefish, octopus, Norway lobster, hake, and various shrimps. The sharp decreases in average prices were registered for hake (–27% at 4,33 EUR/kg) and clam (–16% at 2,60 EUR/kg), whereas that of gilthead seabream grew by 20% reaching 8,20 EUR/kg, compared to December 2017.

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



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).


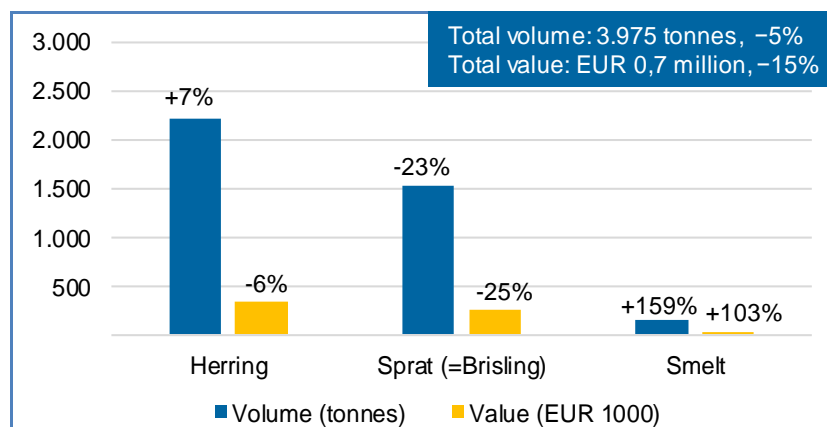
 In **Latvia** in **January–December 2018**, first sales decreased in value (–25%) and volume (–16%) because of lower supplies of sprat (–16%), herring (–16%), and cod (–76%) from the same period in 2017. In **December 2018**, first sales fell from 2017. A decrease in sprat supply, the most important species in total fishery volume terms (39%), was the key reason for the negative trends. Because of the higher supply of 7%, the average price of herring fell by 12% (0,16 EUR/kg). This affected its first-sales value which recorded a decrease of 6% from December 2017.

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



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).


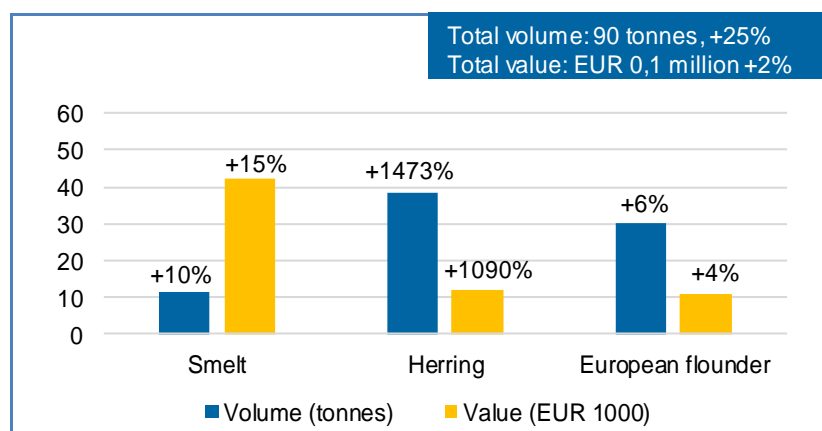
 In **Lithuania** in **January–December 2018**, first-sales value decreased by 12% due mainly to cod (–51%), whereas volume increased by 9% because of herring (+266%), compared to January–December 2017. In **December 2018**, first-sales value and volume increased due to mostly to herring and smelt, and to a lesser extent due European flounder. Average prices of herring and European flounder fell by 24% (to 0,32 EUR/kg) and 1% (to 0,37 EUR/kg), respectively, compared to December 2017.

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



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).


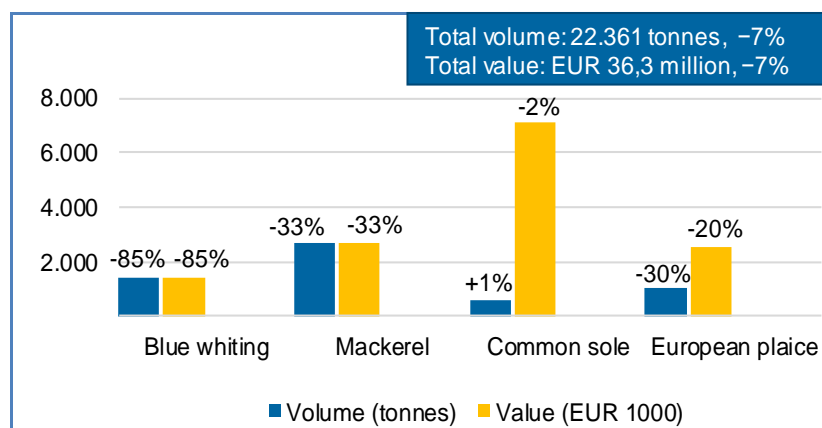
 In the **Netherlands** in **January–December 2018**, compared to the same period in 2017, first-sales value and volume grew by 30% and 58%, respectively. This was due to blue whiting, herring, and Atlantic horse mackerel. In **December 2018**, both first-sales value and volume decreased by 7%. The species most responsible for the decline is blue whiting whose first sales fell by 85% in both value and volume terms. Its average price remained stable as well as that of mackerel; on the other hand, the price of common sole decreased by 3% and reached 11,91 EUR/kg.

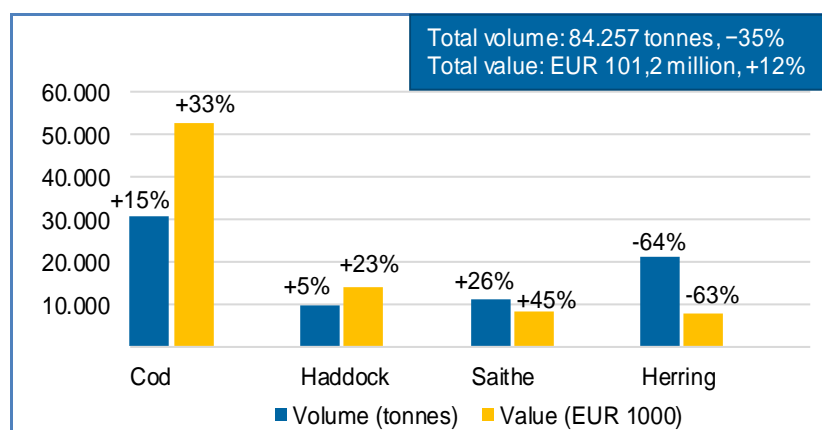
Figure 8. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, DECEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).

 In **Norway** in **January–December 2018**, increases in both first-sales value and volume by 4% were recorded from a year earlier, caused mainly by larger supply of miscellaneous small pelagics, blue whiting, mackerel, and Northern shrimp. In **December 2018**, first-sales value increased with respect to the previous year, mainly because of cod and crab, whereas a decrease in volume was the result of shrinking herring supply. Average prices increased the greatest for mackerel (+55%) to 1,35 EUR/kg, as supply decreased by 64%. Cod price rose by 16%, while its supply increased by 15%.

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



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).


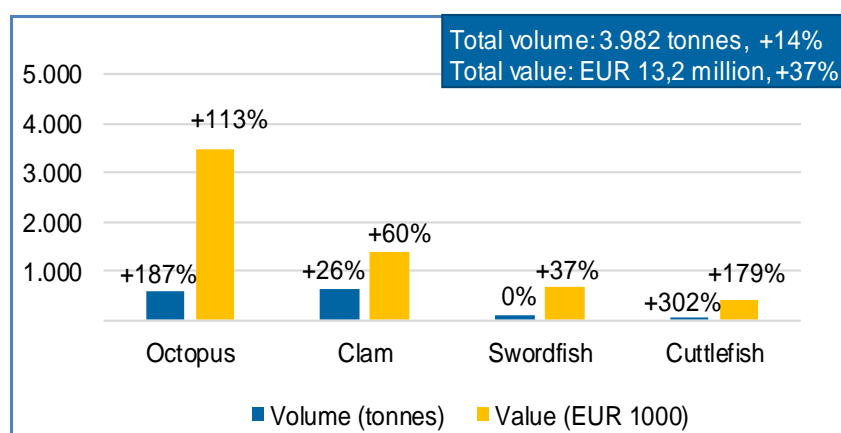
 In **Portugal** in **January–December 2018** compared to the same period in 2017, first-sales value and volume rose by 7% and 6%, respectively, because of higher sales of octopus, clam, squid, and mackerel. In **December 2018**, first-sales value and volume increased compared to the same month in 2017 due to higher supply of high-value species such as octopus, and clam. Octopus price fell by 26% to 6,02 EUR/kg due to a 187% volume increase. Cuttlefish price fell by 31% to 5,64 EUR/kg due to a threefold supply increase. The clam price spiked by 28% although supply was higher.

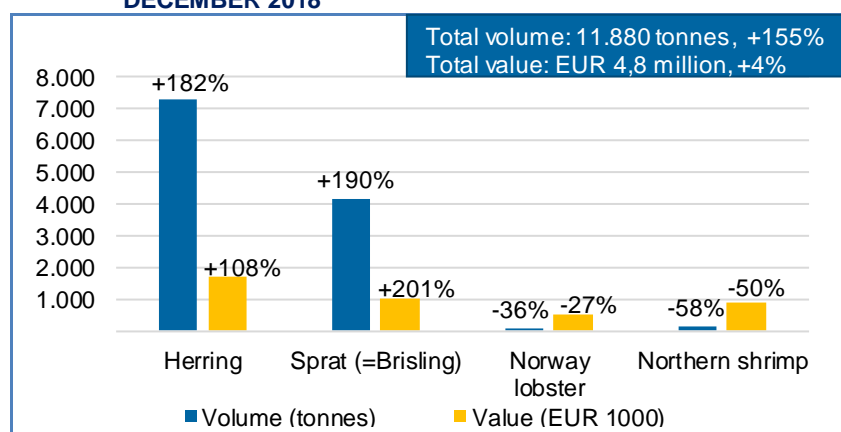
Figure 10. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN PORTUGAL, DECEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).

 In **Sweden**, first sales grew in both value (+4%) and volume (+43%) during **January–December 2018** over the same period in 2017. Herring was the main species sold, accounting for 39% and 69% of overall first-sales value and volume, respectively. In **December 2018**, the overall sharp increase in first-sales volume caused by herring did not have an impact in value terms, as it was offset by decreased first sales of highly valued Northern shrimp. Of the top species, herring price decreased by 26% (to 0,24 EUR/kg), whereas that of Northern shrimp increased to 9,02 EUR/kg (+18%).

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



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).


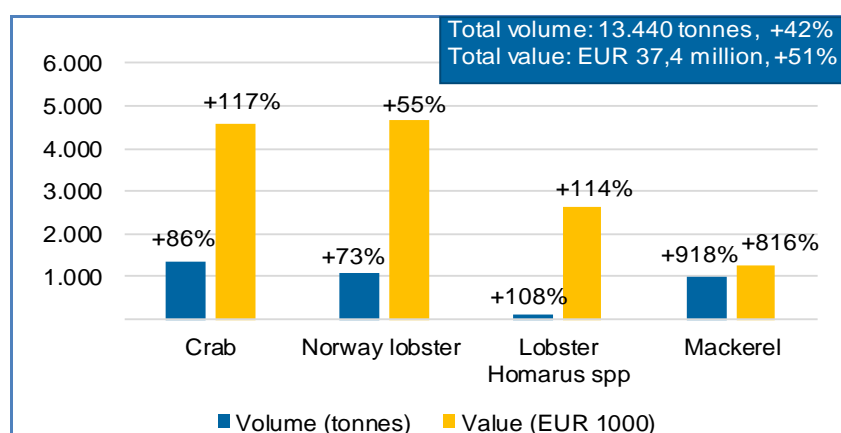
 In the **UK** in **January–December 2018** from a year earlier, first-sales value slightly decreased by 1%, while volume went down by 8% mainly due to lower sales of scallop, mackerel, and cuttlefish. In **December 2018**, first sales grew sharply compared with December 2017. Prices rose for crab, Norway lobster, and lobster *Homarus* spp. The key species with an increase in average prices included crab (+17%), lobster *Homarus* spp. (+3%), and cod (+26%). At the same time, higher supply of Norway lobster and mackerel caused their 10% price decline.

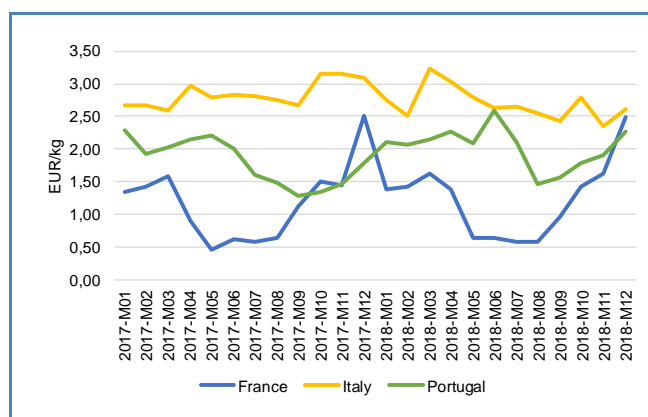
Figure 12. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN THE UK, DECEMBER 2018**



Percentages show change from previous year.
Source: EUMOFA (updated 14.02.2019).

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

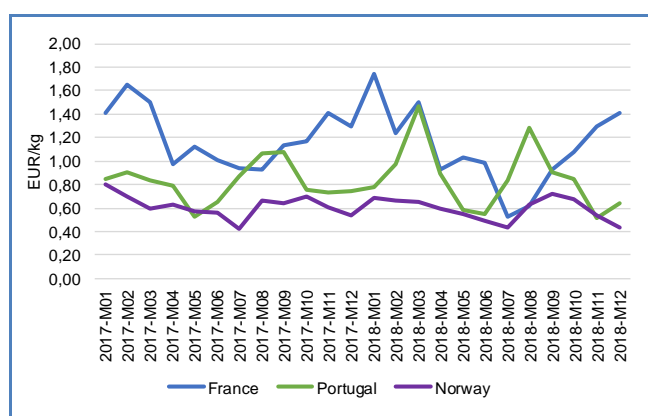
Figure 13. FIRST-SALES PRICES OF CLAM IN FRANCE, ITALY, AND PORTUGAL



Source: EUMOFA (updated 14.02.2019).

First sales of **clam** in Europe are dominated by three countries, **France**, **Italy**, and **Portugal**. Together these countries account for 82% of the 2018 total (as reported by countries involved in EUMOFA). Average prices in **December 2018** were 2,49 EUR/kg in France (up by 53% from November 2018 and down by 1% from December 2017), 2,60 EUR/kg in Italy (+11% over the previous month and –16% from the same month in 2017), and 2,27 EUR/kg in Portugal (+19% over November 2018 and +28% over December 2017). The volume in France is very erratic. Portugal shows seasonal trends, with volumes peaking in the late summer of each year, and with prices declining accordingly during that period.

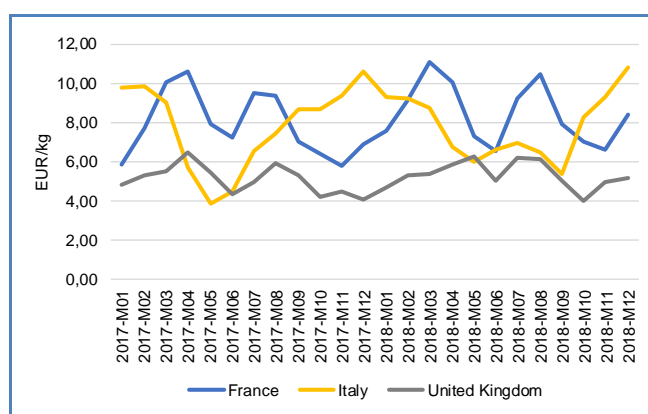
Figure 14. FIRST-SALES PRICES OF DOGFISH IN FRANCE, PORTUGAL, AND NORWAY



Source: EUMOFA (updated 14.02.2019).

Most reported first sales of **dogfish** in Europe take place in **France**, **Portugal**, and **Norway**, which combined had a 90% share of reported total in 2018 (as reported by countries involved in EUMOFA). Average prices in these countries in **December 2018** were 1,41 EUR/kg in France (+9% over the previous month and +8% over the same month in 2017), 0,64 EUR/kg in Portugal (up by 24% from November but down by 14% from December 2017), and 0,44 EUR/kg in Norway (–18% from November and –18% from December 2017). Portugal was the main first sales location but both France and Norway have showed an increasing trend in volume in the last two years, overtaking Portugal in the last few months of 2018. Prices show little connection across these markets.

Figure 15. FIRST-SALES PRICES OF SQUID IN FRANCE, ITALY, AND THE UNITED KINGDOM



Source: EUMOFA (updated 14.02.2019).

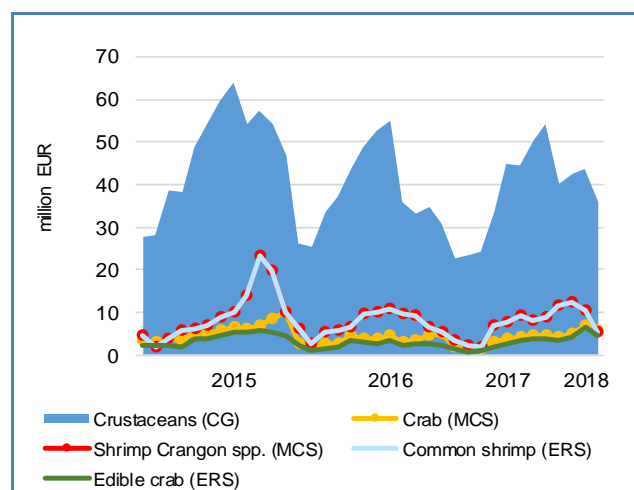
First sales of **squid** occur in several European countries, but three countries have so far accounted for 90% of reported sales in 2018. Average first-sales prices in these countries in **December 2018** were 8,37 EUR/kg in **France** (+27% over November 2018 and +21% from December 2017), 10,84 EUR/kg in **Italy** (+16% over the previous month and +2% over the same month in 2017), and 5,13 EUR/kg in the **UK** (+3% over November and by 27% from a year earlier). In each market prices have shown no particular long-run upward or downward trend in the last two years. Volume is exceptionally seasonal, especially in France, the largest market. Volume peaks in November–December and drops sharply in the summer. As a result, the price in France tends to be highest in the summer and lowest in the winter.

1.5. Commodity group of the month: crustaceans

The **crustaceans** commodity group (CG) ranked 1st in value and 4th in volume among 11 CGs sold at first sales in December 2018². First sales reached EUR 36 million and 6.758 tonnes, increasing by 17% value and 45% in volume over December 2017. In the past 36 months, the highest value of crustaceans was registered in August 2016, surpassing EUR 63,7 million.

The crustaceans include crab, lobster *Homarus* spp., Norway lobster, rock lobster and sea crawfish, shrimp *Crangon* spp., coldwater shrimp, deep-water rose shrimp, miscellaneous shrimps, warmwater shrimp, squillid and other crustaceans. At the species (ERS³) level, Norway lobster (35%) is the most important species in total first-sales value, whereas common shrimp and edible crab together made up 28% of value of crustaceans during **January–December 2018**⁴.

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



Source: EUMOFA (updated 14.02.2019).

*Eleven EU Member States listed on page 2. Norway excluded due to a limited level of data for species at ERS level.

1.6. Focus on common shrimp



Common shrimp (*Crangon crangon*), also called brown shrimp, belongs to genus *Crangon*, which is a part of the family of Crangonidae. The distribution of this small crustacean ranges as far north as the White Sea, in Russia, to Morocco in the south of Atlantic, and also in the Mediterranean and Black Sea. This wide region differs greatly in environmental characteristics. Besides being ecologically important, the species is a very valuable fisheries resource in the North Sea and various other areas (Adriatic Sea, Black Sea)⁵. During the day, it remains buried in the sand to escape predatory birds and fish, with only its antennae protruding. Adults live near the sea-floor, especially in the shallow waters of estuaries or near the coast. Females reach sexual maturity at a length around 22–43 mm, while males are mature at 30–45 mm⁶. It enjoys great popularity in Belgium, the Netherlands, northern Germany, and Denmark.

This species has been mainly exploited by nets or trawls fishery in the Atlantic Northeast Ocean and the Mediterranean⁷. Currently, the brown shrimp fishery is regulated, with the number of permits plus some additional technical measures (mesh and engine size) being controlled.

Landings of *Crangon crangon* for human consumption have constantly increased since the 1970s due to a decrease in predation pressure and an increase in fishing effort and efficiency. The common shrimp fishery primarily takes place in the coastal zones which are characteristically nursery areas for many commercially exploited and non-commercial fish species and are in many cases also designated as Natura 2000 sites⁸.

² More data on commodity groups can be found in table 1.2 in the Annex.

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

⁴ Ranking of the main commercial species in Crustaceans species commodity group can be found in table 1.3 in the Annex.

⁵ <http://dare.uvu.vu.nl/bitstream/handle/1871/16129/abstract%20english.pdf?sequence=4&isAllowed=y>

⁶ <https://www.arkive.org/common-shrimp/crangon-crangon/>

⁷ <http://www.fao.org/fishery/species/3435/en>

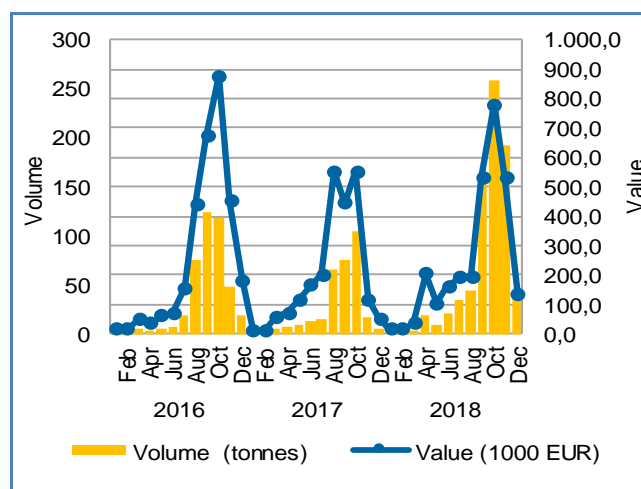
⁸ http://www.ices.dk/sites/pub/Publication%20Reports/Advice/2014/Special%20Requests/Germany_NL_Crangon_advice.pdf

Selected countries

In **Belgium** in January–December 2018, first sales of common shrimp increased by 23% in value and 146% in volume compared to the same period in 2017. Although volume increased significantly, the value did not increase at the same level due to a 50% decrease in first sales average price. Compared to two years earlier, first-sales value decreased by 5%, whereas volume grew by 85%. In December 2018 compared with December 2017, both first-sales value and volume increased from EUR 50.000 and 5 tonnes to EUR 137.000 and 39 tonnes.

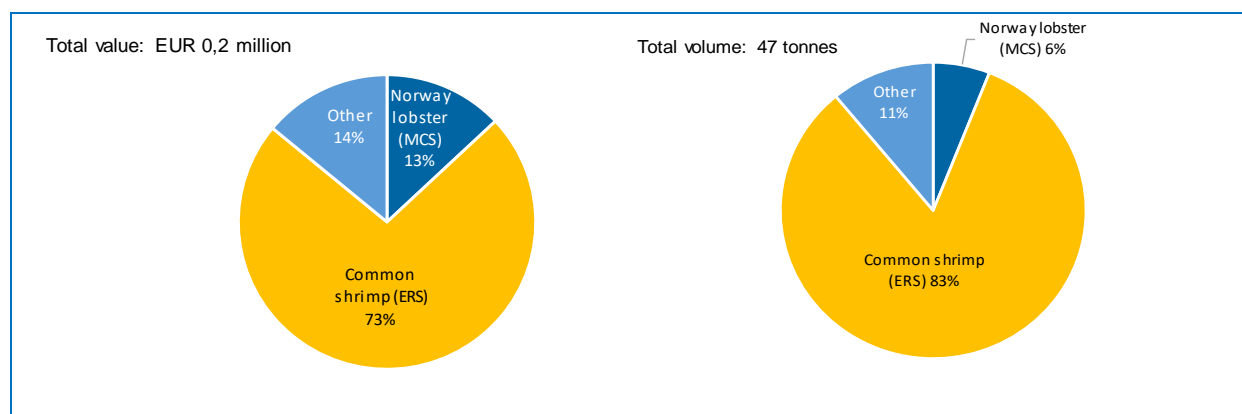
In 2018, all common shrimp first sales made in auctions occurred at Nieuwpoort, Oostende and Zeebrugge on the coast of the North Sea.

Figure 17. **COMMON SHRIMP: FIRST SALES IN BELGIUM**



Source: EUMOFA (updated 14.02.2019).

Figure 18. **FIRST-SALES COMPARISON OF CRUSTACEANS SPECIES IN BELGIUM, VALUE AND VOLUME, DECEMBER 2018**

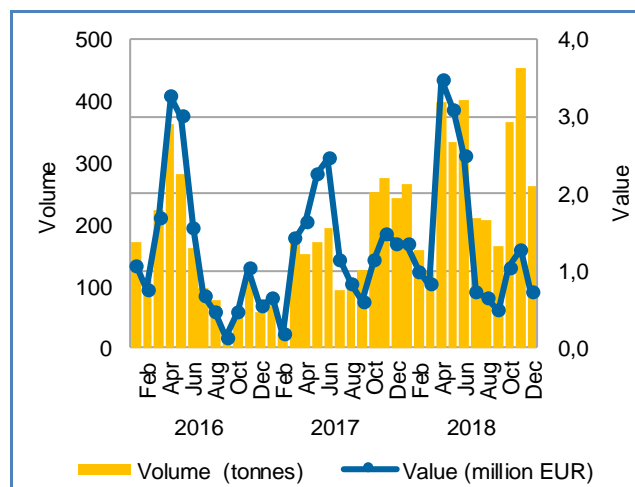


Source: EUMOFA (updated 14.02.2019).

In **Denmark** in January–December 2018, first sales of common shrimp increased by 13% in value and 80% in volume over the same period in 2017. Compared with 2016, first-sales value and volume grew by 17% and 94%, respectively. First-sales value did not follow the volume trend in the same proportion due to average price decrease of 40%. In December 2018, first-sales value was nearly half lower due to a fall in average price of 52% compared with the levels as in December 2017, whereas volume was up by 9%.

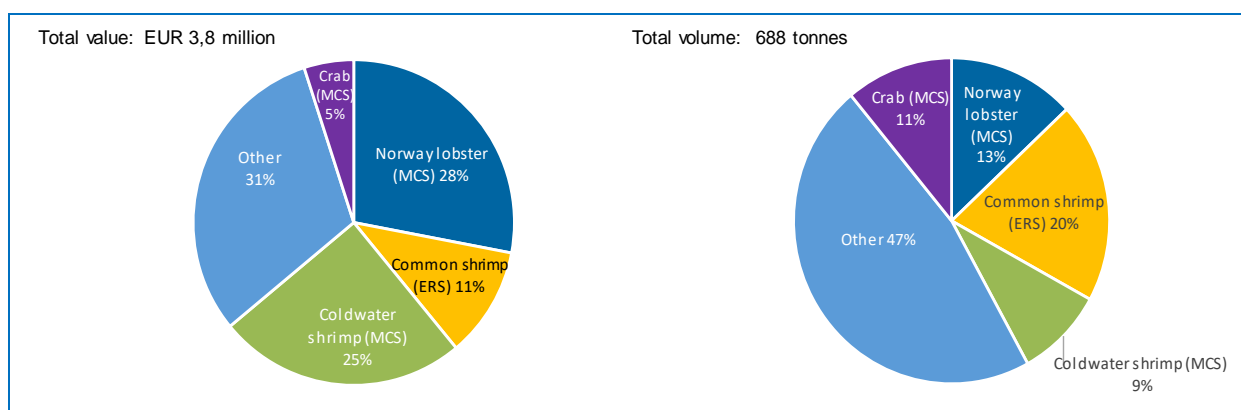
The ports of Esbjerg, Havneby, Hvide Sande and Thorsminde on the North Sea coast are locations where all the first sales valued at EUR 17 million, occurred in 2018.

Figure 19. **COMMON SHRIMP: FIRST SALES IN DENMARK**



Source: EUMOFA (updated 14.02.2019).

Figure 20. **FIRST-SALES COMPARISON OF CRUSTACEANS SPECIES IN DENMARK, VALUE AND VOLUME, DECEMBER 2018**

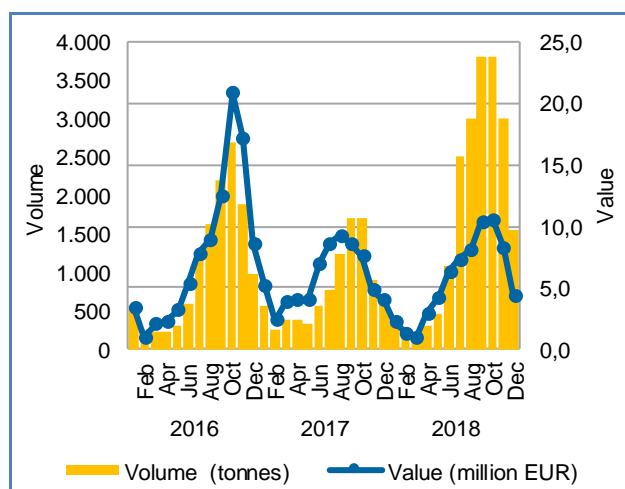


Source: EUMOFA (updated 14.02.2019).

In the **Netherlands** in January–December 2018, first-sales value fell by 3%, while volume doubled compared with January–December 2017. The higher supply of common shrimp lowered its average price by 55%. Trends were in the same direction from 2016, as value fell by 28%, while volume grew by nearly 60%. In December 2018, first-sales value grew by 7%, compared to December 2017, whereas volume spiked by 158%. The volume rise caused a price decline by 59%.

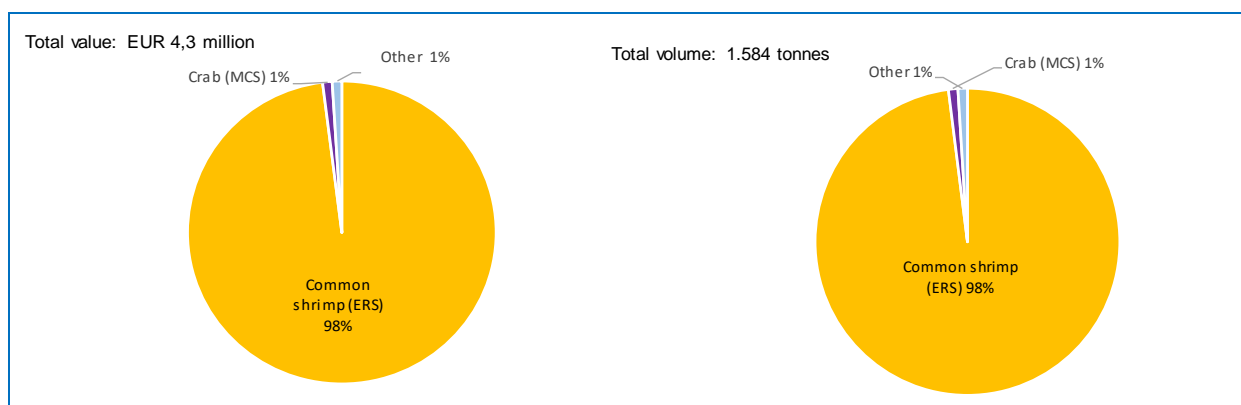
The ports of Wieringen, Lauwersoog, Zoutkamp, and Harlingen on the North Sea coast are the most important in terms of first-sales value (84% of total) in 2018.

Figure 21. **COMMON SHRIMP: FIRST SALES IN THE NETHERLANDS**



Source: EUMOFA (updated 14.02.2019).

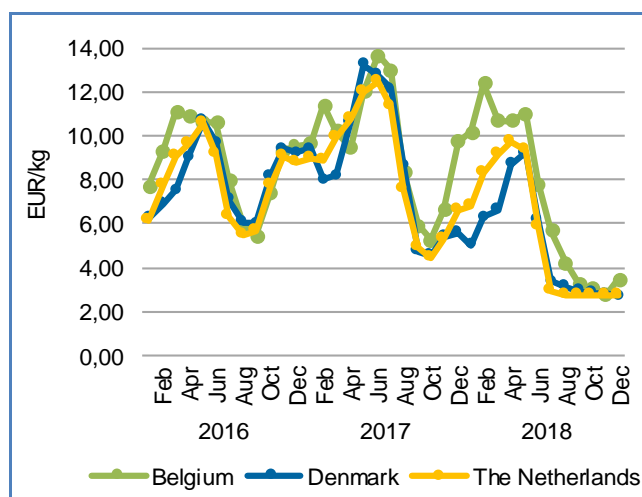
Figure 22. **FIRST-SALES COMPARISON OF CRUSTACEANS SPECIES IN THE NETHERLANDS, VALUE AND VOLUME, DECEMBER 2018**



Source: EUMOFA (updated 14.02.2019).

Price trends

Figure 23. **COMMON SHRIMP: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 14.02.2019).

In the past 36-month period (January 2016–December 2018), the highest average price of common shrimp was recorded in Belgium (8,52 EUR/kg), 18% higher than in Denmark (7,20 EUR/kg), and 16% more than the average price in the Netherlands (7,33 EUR/kg).

In **Belgium** in 2018, the average price decreased by about 50% to 3,67 EUR/kg compared to both 2017 and 2016. The peak price was recorded in June 2017 when 12 tonnes were sold for 13,66 EUR/kg. The lowest price occurred in November 2018 when 193 tonnes were sold for 2,74 EUR/kg. In the past three years, the most intense common shrimp fishery season took place during September–October.

In **Denmark**, the average price of common shrimp (5,09 EUR/kg) in 2018 was lower than in the previous two years: –37% compared to 2017, and –40% with 2016. The highest price recorded in the 36-month period was in May 2017 when it reached 13,26 EUR/kg for the volume of about 171 tonnes. The lowest price was recorded in December 2018 when 262 tonnes were sold at 2,72 EUR/kg.

In the **Netherlands**, the average price of 3,31 EUR/kg in 2018 was the lowest among the surveyed countries. This is closely linked with the highest supply of common shrimp among the surveyed countries. In 2018, the average price was 55% lower from 2017 and 2016. The highest average price was recorded in June 2017 when 559 tonnes were sold at 12,43 EUR/kg, whereas the lowest price occurred in August 2018 at 2,71 EUR/kg for 3.002 tonnes.

1.7. Focus on edible crab



The edible or brown crab (*Cancer pagurus*) is the most commercially important species of crab in Europe. It is a European species which belongs to the Cancridae family. It is distributed between North Africa and northern Norway. The main habitat is around the British Isles, including Ireland, while the French and Norwegian coasts are also locations for significant populations⁹. As a marine species, the edible crab is only found in waters with high and relatively stable salinity. To avoid cold surface water during winter, the crab often

migrates as deep as 30–50 metres.

The edible crab lives for approximately 15 years and can reach a width of up to 30 cm (carapace) and weigh up to 2,5 kg. It takes 5–7 years to reach the age of maturity, and crabs mate when the female is moulting. It lives on hard and stony bottoms, but the female migrates to sandy bottoms, where it digs into. Crab is usually caught during summer and autumn: more specifically, larger volumes are landed from May to December with a peak from July to November. Most crab is captured using traps or creels. It can be fished individually or in strings¹⁰. By-catch of crab by trawlers is known to be significant in some areas.

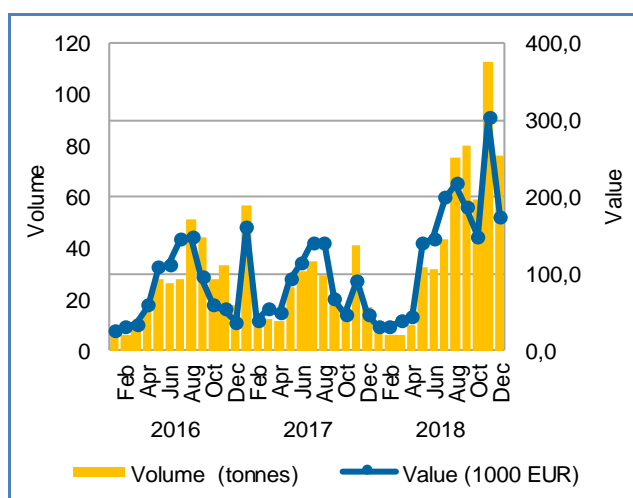
Management includes fishing effort limitations and technical conservation measures and crab is not subject to catch limits such as TACs and quotas. The total number of traps allowed is limited, depending on the boat size, the number of crew, and the fishing ground¹¹. In the EU only whole individuals, excluding berried females and soft-shelled crabs, with a minimum shell width of 13cm, shall be marketed¹². National legislation restricts the number of shellfish licences available (in England and Wales) and also prohibits landing of berried and soft crabs¹³.

Selected countries

In **Denmark** in January–December 2018, the value of edible crab first sales grew by 59%, whereas volume grew by 76% over the same period in 2017. Compared to 2016, first-sales value grew by 84% and volume by 86%. In December 2018, first-sales value increased by about 3 times, while volume spiked about 3,5 times compared to the same month a year earlier.

The main ports that account for 68% of total first-sales value in 2018 are Hvide Sande, Thorsminde, and Thyborøn on the North Sea coast.

Figure 24. EDIBLE CRAB: FIRST SALES IN DENMARK



Source: EUMOFA (updated 14.02.2019).

⁹ <https://www.marlin.ac.uk/species/detail/1179>

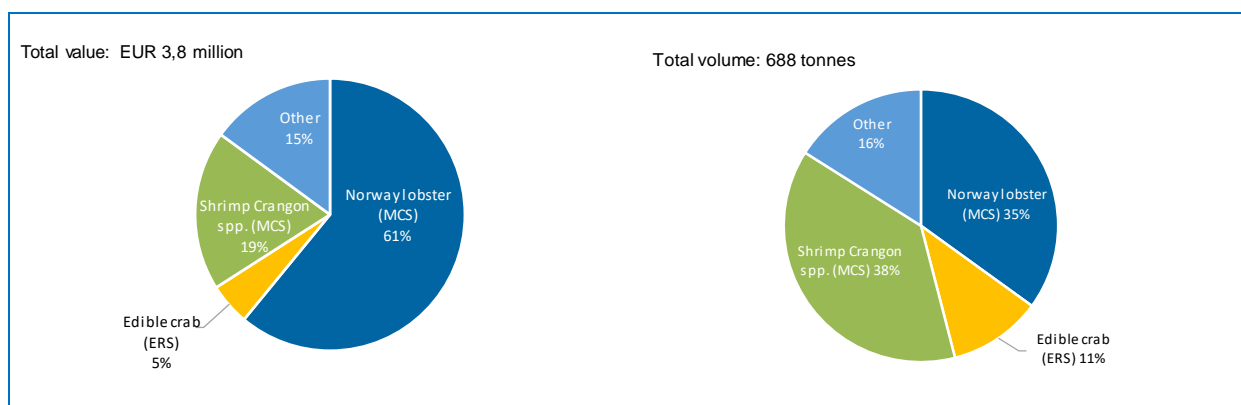
¹⁰ <http://www.imr.no/temasider/skalldyr/taskekrabbe/en>

¹¹ http://www.seafish.org/media/publications/SeafishResponsibleSourcingGuide_CrabsLobsters_201309.pdf

¹² COUNCIL REGULATION (EC) No 2406/96 <https://eur-lex.europa.eu/eli/reg/1996/2406/oj>

¹³ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/462265/2014_Crab_assessments.pdf

Figure 25. **FIRST-SALES COMPARISON OF CRUSTACEANS SPECIES IN DENMARK, VALUE AND VOLUME, DECEMBER 2018**

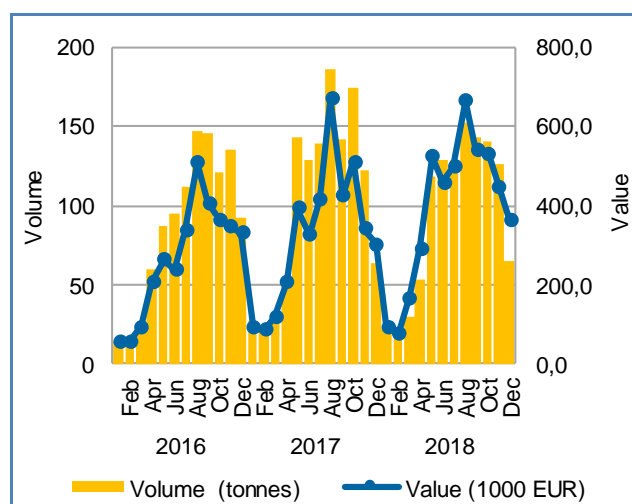


Source: EUMOFA (updated 14.02.2019).

In **France** in January–December 2018, first sales of edible crab grew by 20% in value and fell by 9% in volume from 2017. Compared to the same period in 2016, first-sales value increased by 45%, while volume went up 7%. In December 2018, first-sales value increased by 21%, whereas volume slightly grew by 2% over December 2017.

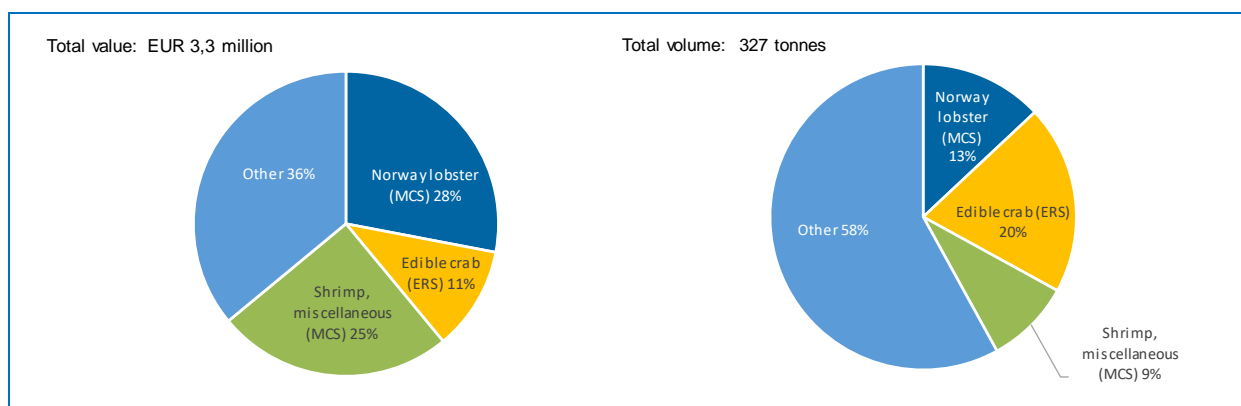
The ports of Douarnenez, Brest, and Roscoff on the coast of the Celtic Seas, Lorient, and Le Croisic in the Bay of Biscay accounted for about 65% of total first-sales value in 2018.

Figure 26. **EDIBLE CRAB: FIRST SALES IN FRANCE**



Source: EUMOFA (updated 14.02.2019).

Figure 27. **FIRST-SALES COMPARISON OF CRUSTACEANS SPECIES IN FRANCE, VALUE AND VOLUME, DECEMBER 2018**

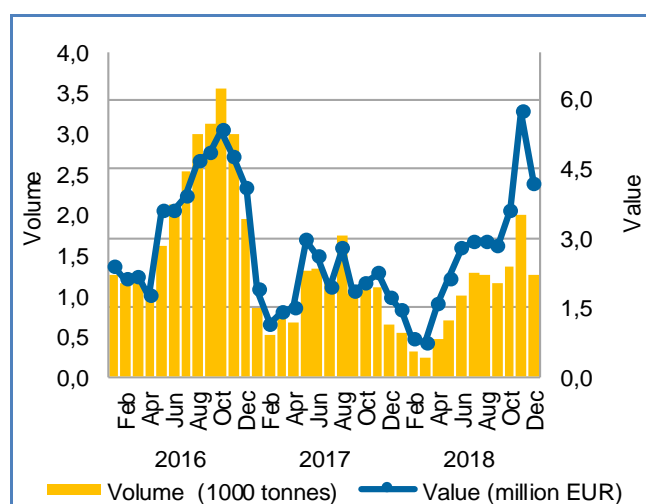


Source: EUMOFA (updated 14.02.2019).

In the **UK** in January–December 2018, first sales of edible crab increased by 32% in value, whereas they decreased by 5% in volume, compared to the same period in 2017. Compared to 2016, first-sales value and volume dropped by 27% and 54%, respectively. In December 2018, first-sales value rose by almost 150%, whereas volume nearly doubled over December 2017. The UK is the fishing nation with the highest volume of edible crab among surveyed countries.

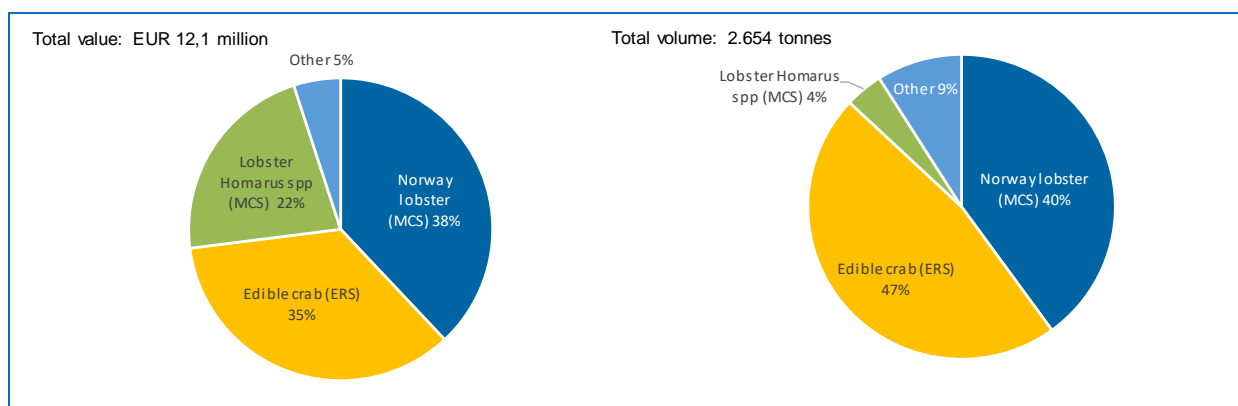
In 2018, 50% of total first-sales value occurred at 192 ports in the Celtic seas, whereas other 50% at the 130 ports on the coast in the North Sea.

Figure 28. **EDIBLE CRAB: FIRST SALES IN THE UK**



Source: EUMOFA (updated 14.02.2019).

Figure 29. **FIRST-SALES COMPARISON OF CRUSTACEANS SPECIES IN THE UK, VALUE AND VOLUME, DECEMBER 2018**



Source: EUMOFA (updated 14.02.2019).

Price trends

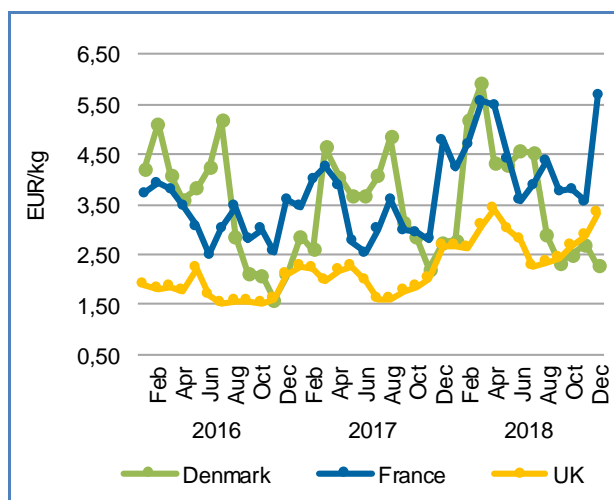
In the past 36 months (January 2016–December 2018), the highest average price of edible crab was observed in France (3,69 EUR/kg), about 5% over the one in Denmark (3,51 EUR/kg) and 69% over the one in the UK (2,19 EUR/kg).

In **Denmark** in January–December 2018, the average first-sales price (3,04 EUR/kg) decreased by 9% from 2017 and 1% from 2016. The highest price was recorded in March 2018, at 5,93 EUR/kg for 6 tonnes, whereas the lowest was registered in November 2016 when 33 tonnes were sold at 1,59 EUR/kg. The fishery season for the edible crab fluctuates during the year, with the low season in January–March.

In **France**, the average price of edible crab during January–December 2018 was 4,15 EUR/kg – an increase of 31% over 2017 and of 36% over 2016. The highest average price was recorded in December 2018 when 64 tonnes were sold for 5,68 EUR/kg. The lowest average price occurred in June 2016 at 2,50 EUR/kg for 95 tonnes. In the three years, the highest sales occurred in the months of August and October. As in Denmark, the edible crab fishery is the lowest at the beginning of the year – as of January to March.

In the **UK** in January–December 2018, the average price of edible crab was 2,73 EUR/kg – an increase of 39% over 2017 and of 61% over 2016. The highest price was recorded in April 2018, when 465 tonnes were sold at 3,41 EUR/kg. The lowest price in the three-year period occurred in October 2016 at 1,50 EUR/kg for 3.550 tonnes. In the observed period, the price was significantly higher during the low season in the winter, due to reduced supply.

Figure 30. **EDIBLE CRAB: FIRST-SALES PRICE IN SELECTED COUNTRIES**



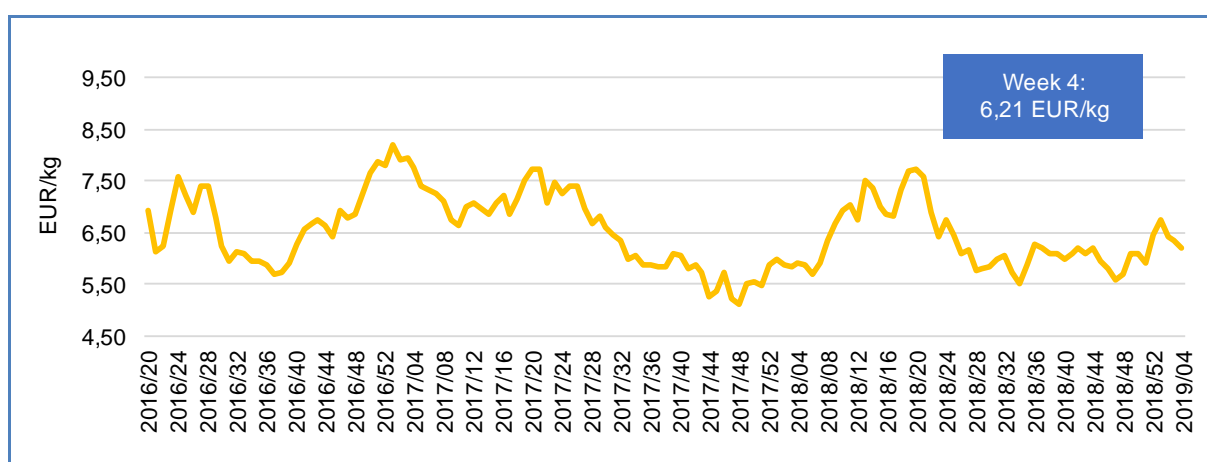
Source: EUMOFA (updated 14.02.2019).

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 Norway lobster, crab, and shrimps and prawns, examined as part of the month's selected commodity group, which this month is crustaceans, along with three other selected species products – Nile perch, carp, and octopus.

For fresh whole **Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway**, the EU import price fell in week 4 to 6,21 EUR/kg, a 2% decline from the previous week. However, more broadly Norwegian salmon prices have continued to recover from low levels in the autumn, and industry reports indicate positive expectation in the weeks ahead. Part of this is generally strong global demand for salmon, which will strengthen prices in all markets. Volume in week 4 continued to be low, following the peak in supplies during the December holiday period.

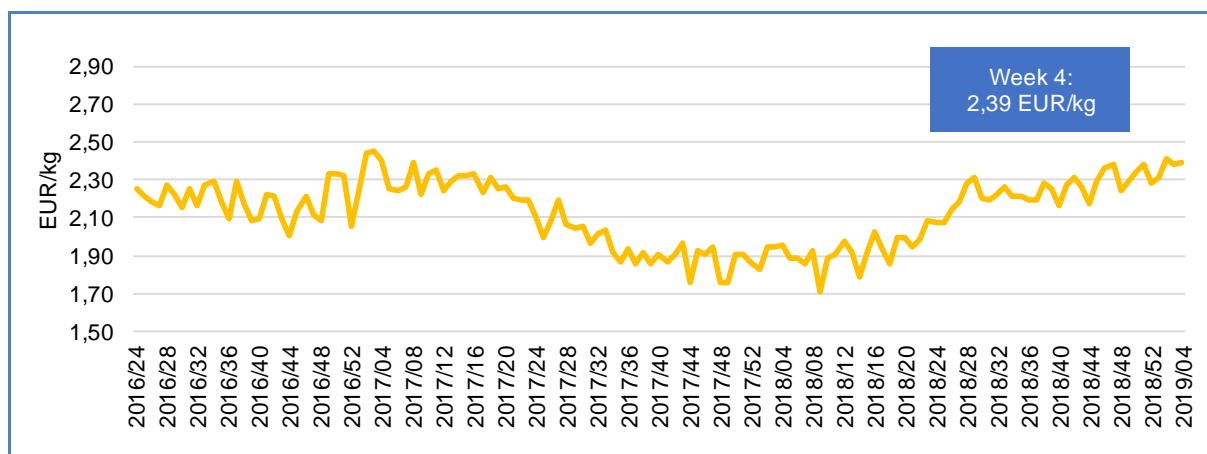
Figure 31. **IMPORT PRICE OF ATLANTIC SALMON, FRESH WHOLE FROM NORWAY**



Source: European Commission (updated 14.02.2019).

The weekly price of frozen fillets of **Alaska pollock** (*Theragra chalcogramma*, CN code 03047500) imported from **China** rose slightly in week 4 to 2,39 EUR/kg, up by 0.5% from the previous week. Volume fell by 26% to 2.535 tonnes, which is about 16% below the average in the previous 52 weeks. The price has continued to rise from depressed levels during much of the early part of 2018, when the weekly average fell to as low as 1,71 EUR/kg in week 9 of 2018.

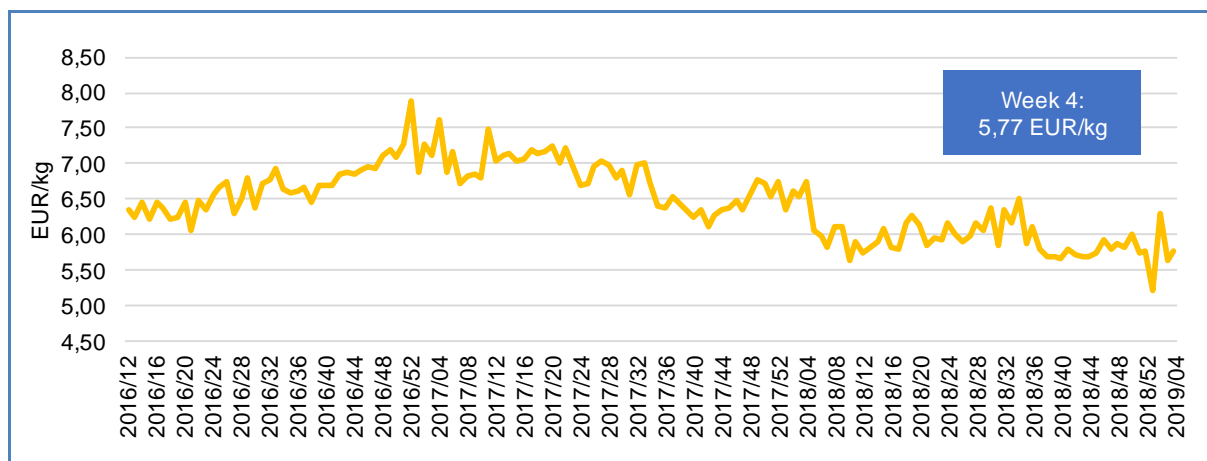
Figure 32. **IMPORT PRICE OF ALASKA POLLOCK, FROZEN FILLETS FROM CHINA**



Source: European Commission (updated 14.02.2019).

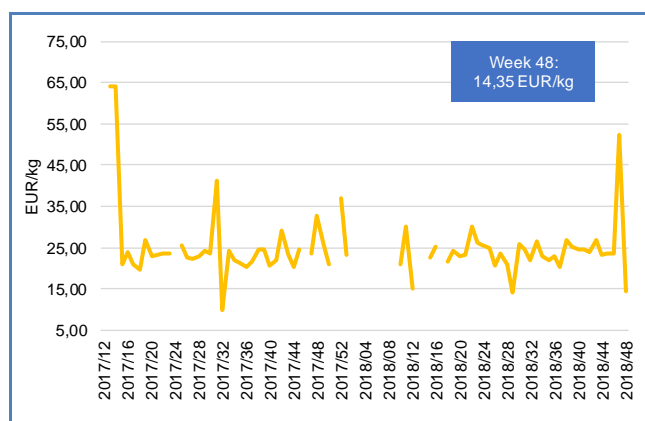
The price of frozen **tropical shrimp** (genus *Penaeus*, CN code 03061792) imported from **Ecuador** in week 4 rose slightly, up by 2% to 5,77 EUR/kg. This is equal to the average price during the previous 15 weeks. The price appears to have stabilized after a long downward trend in 2018. Volume has declined in the last ten weeks, reflecting Ecuador's increased interest in selling its still-growing production to markets elsewhere, including Asia.

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



Source: European Commission (updated 14.02.2019).

Figure 34. **IMPORT PRICE OF NORWAY LOBSTER, FROZEN FROM ICELAND**

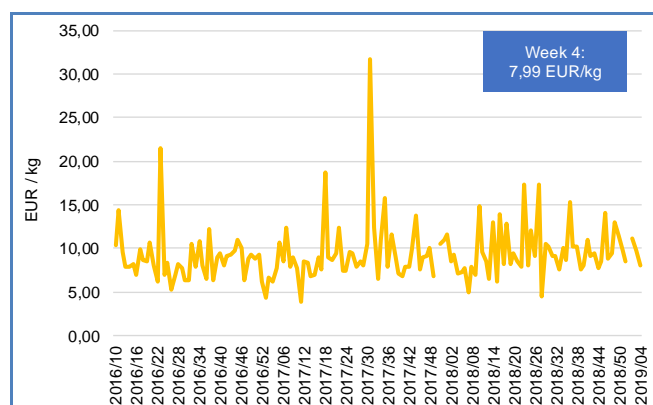


Source: European Commission (updated 14.02.2019).

For **Norway lobster**, *Nephrops norvegicus*, frozen (CN code 03061500) from **Iceland**, the EU import price was 14,35 EUR/kg in **week 48** of 2018, the last week for which EU imports of this product and source were recorded. Imports are sporadic, with large supply fluctuations from one week to the next and corresponding to high price volatility.

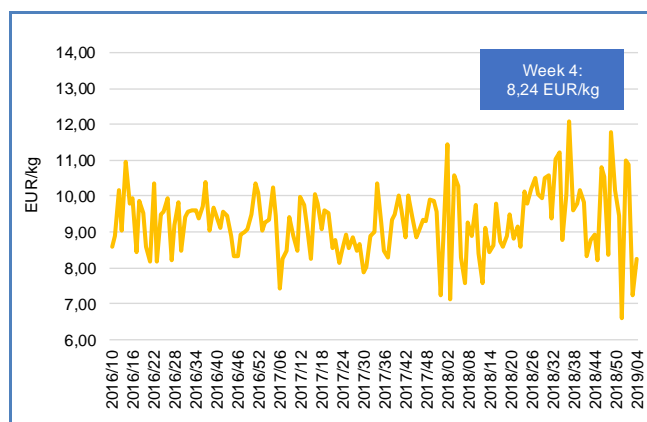
The EU import price of prepared or preserved **crab** (CN code 16051000) from **Vietnam** was 7,99 EUR/kg in **week 4**, down by 17% from a week earlier, while volume rose by 55%. Volume is seasonal, but this is not reflected in the price, which shows a very slight upward trend in the last three years. The average annual price for this product rose from 8,65 EUR/kg in 2016, to 9,68 EUR/kg in 2018. The average price in the first 4 weeks of 2019 is 9,58 EUR/kg.

Figure 35. **IMPORT PRICE OF CRAB, PREPARED OR PRESERVED FROM VIETNAM**



Source: European Commission (updated 14.02.2019).

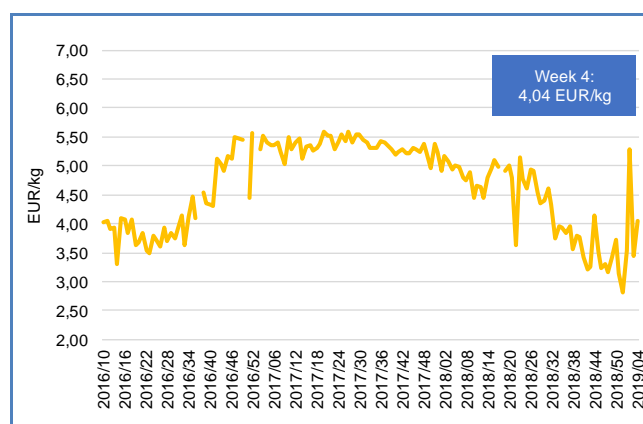
Figure 36. **IMPORT PRICE OF SHRIMPS AND PRAWNS NOT IN AIRTIGHT CONTAINERS, PREPARED OR PRESERVED FROM CANADA**



Source: European Commission (updated 14.02.2019).

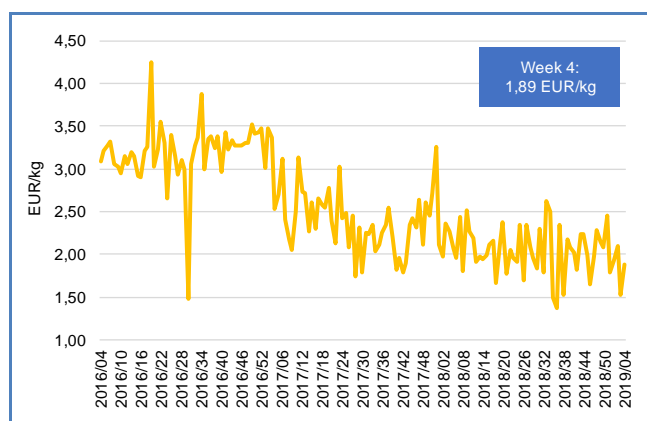
For fresh or chilled fillets of **Nile perch** (*Lates niloticus*, CN code 03041901), imported from **Uganda**, the price reached 4.04 EUR/kg in **week 4**, up by 18% from the previous week, but 4% below the average weekly price during the previous 52 weeks. Volume was down by 48% in week 4 from the previous week, and about 20% lower than the average during the previous 52 weeks. This price has experienced a long wave-like pattern in the past three years, and volume did also, with periods of volume growth roughly corresponding to price movements.

Figure 37. **IMPORT PRICE OF NILE PERCH FILLETS, FRESH OR CHILLED FROM UGANDA**



Source: European Commission (updated 14.02.2019).

Figure 38. **IMPORT PRICE OF CARP, FROZEN FROM MYANMAR**



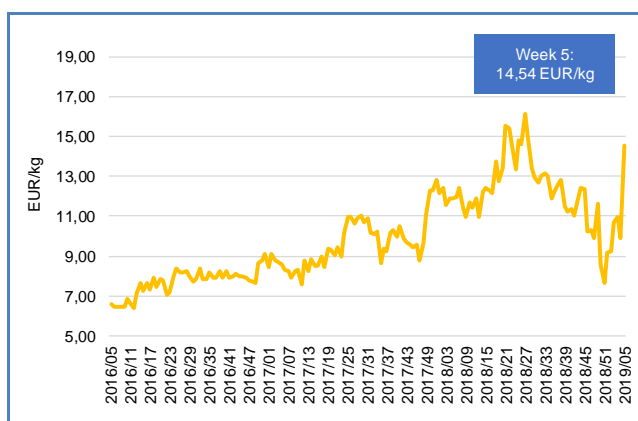
Source: European Commission (updated 14.02.2019).

The price of **shrimp and prawns** not in airtight containers, prepared or preserved (CN code 16052190) from **Canada** was 8.24 EUR/kg in **week 4**, up by 14% from the previous week. Volume in week 4 grew considerably, but it was still far below the average weekly volume in the past 20 weeks, which was a peak volume period for this seasonal product. Price is less seasonal, and it showed a slight longer-run U-shaped trend during 2016–2018.

The price of frozen **carp** (CN code 03037911), imported from **Myanmar**, rose to 1.89 EUR/kg in **week 4**, up by 23% from week 3. This price level is 7% below the average weekly price during the previous 52 weeks, part of a long downward trend that began in early 2017. This corresponds to a sharp rise in weekly volumes in early 2017, which has sustained itself since. Average weekly volume in 2016 was 29.5 tonnes, but from week 1 of 2017 to week 4 of 2019, the average was 110 tonnes.

For frozen **octopus** (CN code 03075910) imported from **Morocco**, the price in **week 5** was 14,54 EUR/kg, up by 47% from the previous week. There was a long upward trend in this price from week 5 of 2016 to week 27 of 2018, which corresponded to a long-run decline in volume (interrupted by shorter-run seasonal swings in supply). Since then volume has continued to decline but prices have too.

Figure 39. **IMPORT PRICE OF OCTOPUS, FRESH FROM MOROCCO**



Source: European Commission (updated 14.02.2019).

3 Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In November 2018, consumption of fresh fisheries and aquaculture products decreased in most of the Member States surveyed compared with November 2017. The largest decreases in volume occurred in Sweden (–23%) and the UK (–20%). Only in Hungary, Ireland, and Italy consumption increased. These three Member States also registered increases in value terms with Hungary experiencing the biggest increases in both volume and value (+15% and +33%, respectively).

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

Country	Per capita consumption 2016* (live weight equivalent) kg/capita/year	November 2016		November 2017		October 2018		November 2018		Change from November 2017 to November 2018	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	24,7	527	7,58	561	8,18	595	9,42	503	7,57	10%	8%
France	32,9	19.083	201,67	19.630	206,74	19.630	202,62	18.123	192,51	8%	7%
Germany	13,9	4.509	56,51	5.992	76,41	4.126	66,34	5.139	64,29	14%	16%
Hungary	5,2	254	1,39	326	1,84	318	1,73	376	2,44	15%	33%
Ireland	23,0	1.046	14,56	925	13,45	933	13,54	968	13,88	5%	3%
Italy	31,1	26.001	226,32	26.011	232,96	25.579	230,33	27.857	250,83	7%	8%
Netherlands	21,0	2.487	31,74	2.507	33,89	2.460	33,81	2.480	34,69	1%	2%
Poland	14,5	5.228	24,98	4.922	25,55	4.209	24,58	4.309	25,84	12%	1%
Portugal	57,0	4.399	27,61	4.238	28,08	4.168	26,33	4.106	28,68	3%	2%
Spain	45,7	56.420	416,43	53.104	408,59	50.896	384,22	51.665	397,70	3%	3%
Sweden	26,4	553	7,28	709	8,96	1.174	14,52	548	7,29	23%	19%
UK	23,7	3.809	53,70	4.451	69,29	3.553	56,31	3.566	53,40	20%	23%

Source: EUMOFA, based on Europanel (updated 11.02.2018).

*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

For the past three years, only in two Member States household consumption of fresh fisheries and aquaculture products in the month of November has been above the annual average in both volume and value terms, namely in France (+4% and +5%, respectively) and Spain (+2% and +8%). In the Netherlands, household consumption in November was 2% above the average in volume, while value was 1% below the annual average. In Poland, value was 7% above the average consumption level, but volume was 2% below. In the rest of the Member States surveyed, volume and value have been below the annual average.

The most recent consumption data available in EUMOFA for **December 2018** can be accessed [here](#).

3.2. Fresh haddock

Habitat: a demersal whitefish found on sandy or muddy grounds in waters at depths of 40–300 m.

Catch area: Northeast and Northwest Atlantic; in the east from the Celtic Sea to Spitsbergen, the Barents Sea and around Iceland; in the west from Georges Bank to Newfoundland¹⁴.

Main producing countries in Europe: Norway, Iceland, the UK, France, Ireland¹⁵.

Production method: caught.

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

Presentation: whole, filleted.

Preservation: fresh, chilled, frozen, smoked.



3.2.1 General overview of household consumption in Ireland and Sweden

Sweden is among the EU countries with the highest 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 and unchanged compared with the previous year.

In Ireland, per capita consumption was 23,0 kg in 2016, 13% lower than in Sweden and 5% lower than the EU average. However, it showed a 5% increase compared with 2015. Compared with consumption in Portugal (57,0 kg per capita, the highest in the EU), Sweden's and Ireland's consumption were 54% and 60% lower, respectively. See more on per capita consumption in the EU in table 3.

Both in Ireland and Sweden, retail prices of fresh haddock fluctuated considerably during January 2015–November 2018. Prices registered in Sweden (13,19 EUR/kg on average) were higher than those in Ireland, while volumes consumed were bigger in Ireland (45 tonnes on average).

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

First sales: Denmark (2/2018, October 2013), France (2/2018), Norway (8/2015), Sweden (4/2014), the UK (2/2018, 5/2016, April 2013).

Extra-EU Import: Russia (02/2018), Norway (10/2018).

Topic of the month: Haddock in the EU (7/2017), Haddock in the UK (5/2015), Haddock in the UK (April 2013).

Consumption: Ireland (9/2017), Sweden (9/2017, Oct 2013), the UK (9/2017, Oct 2013).

¹⁴ <https://www.ices.dk/explore-us/projects/EU-RFP/EU%20Repository/ICES%20FishMap/ICES%20FishMap%20species%20factsheet-haddock.pdf>

¹⁵ <http://www.eumofa.eu/documents/20178/104890/MH+7+2017.pdf>

Figure 40. RETAIL PRICES OF FRESH HADDOCK

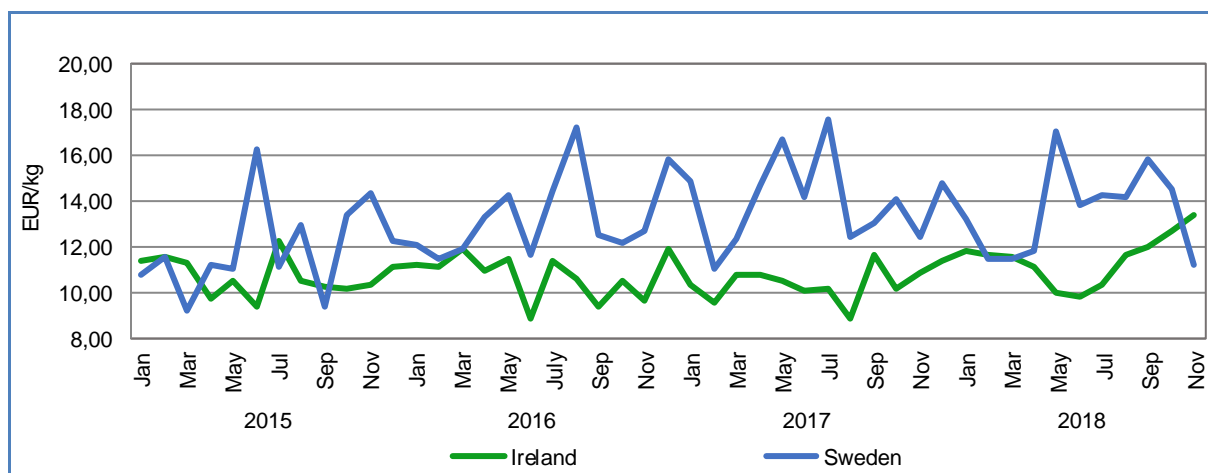
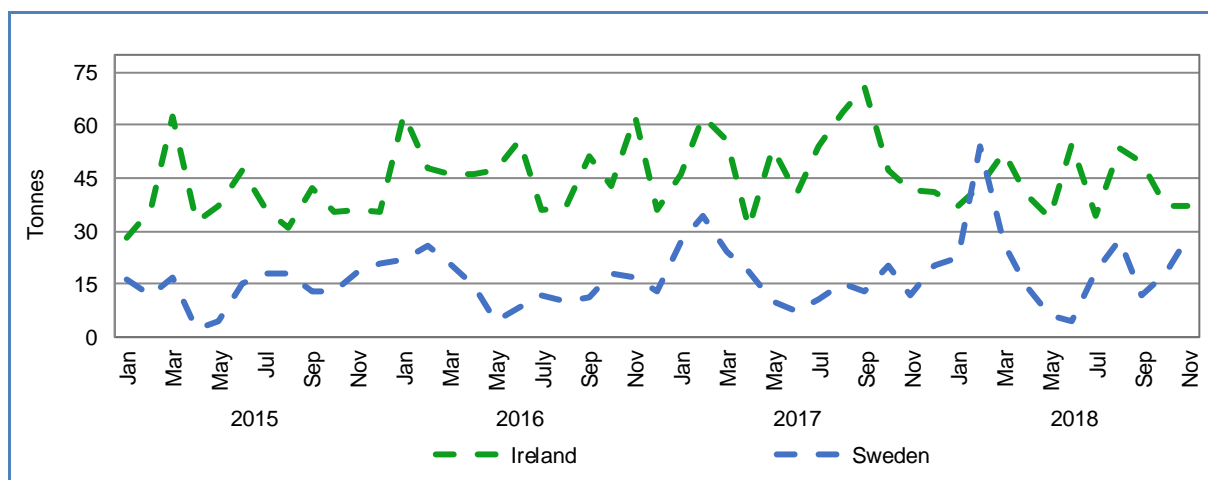


Figure 41. HOUSEHOLDS PURCHASES OF FRESH HADDOCK



3.2.2 Consumption trend in Ireland

Long-term trend, January 2015–November 2018: increasing in both volume and price.

Yearly average price: 10,70 EUR/kg (2015), 10,75 EUR/kg (2016), 10,42 EUR/kg (2017).

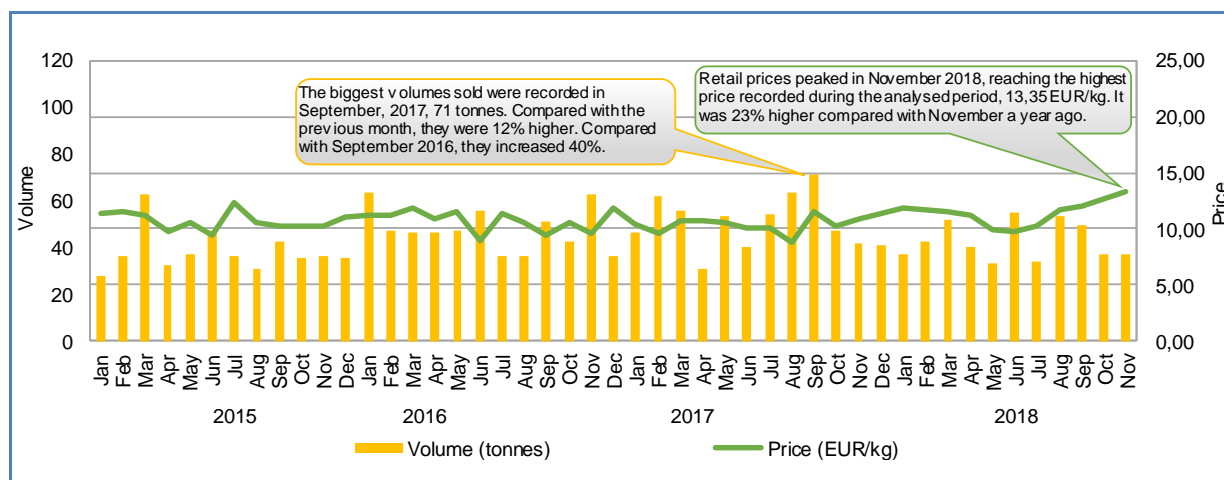
Total yearly consumption: 460 tonnes (2015), 572 tonnes (2016), 608 tonnes (2017).

Short-term trend, January–November 2018: stable in volume and increasing in price.

Average price: 11,46 EUR/kg.

Total consumption, January–November 2018: 472 tonnes.

Figure 42. RETAIL PRICE AND VOLUME SOLD OF FRESH HADDOCK IN IRELAND



Source: EUMOFA, based on Europanel (updated 14.02.2019).

3.2.3 Consumption trend in Sweden

Long-term trend, January 2015–November 2018: increasing in both volume and price.

Yearly average price: 11,95 EUR/kg (2015), 13,30 EUR/kg (2016), 14,00 EUR/kg (2017).

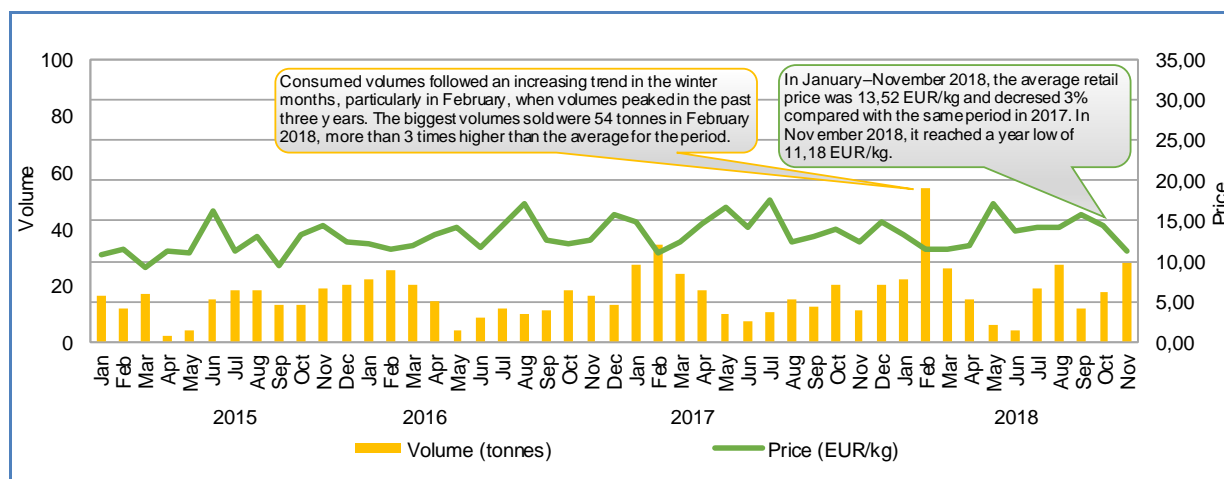
Total yearly consumption: 167 tonnes (2015), 176 tonnes (2016), 211 tonnes (2017).

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

Average price: 13,52 EUR/kg.

Total consumption, January–November 2018: 231 tonnes.

Figure 43. RETAIL PRICE AND VOLUME SOLD OF FRESH HADDOCK IN SWEDEN



Source: EUMOFA, based on Europanel (updated 14.02.2019).

4 Case study – Atlantic cod in the EU¹⁶

4.1. Introduction

Atlantic cod (*Gadus Morhua*) is a benthopelagic fish that inhabits the water just above the sea bottom, feeding on zooplankton, fish and benthos. Atlantic cod can live for up to 25 years and has a common length of 100 cm. Normally its weight ranges between 5 and 12 kg, but the largest weight ever recorded is 96 kg¹⁷. The species usually attain sexual maturity between two and four years old, they are not all mature before they are six years old. There is also a tendency for cod in the northern North Sea to mature at an older age than in the southern North Sea¹⁸. Spawning occurs in the winter and beginning of the spring, where big schools of fish are formed.



Atlantic cod's geographical distribution spreads widely in the North-Atlantic Ocean, from the Barents Sea and Bear Islands in the east to the North Sea, Baltic Sea, around Iceland and Greenland to the North American coast. In the North-Atlantic Ocean cod normally appears in depths of up to 600 meters in the open ocean, grounds close to shore and in fjords. It can adapt to a variety of temperatures and lives in almost every salinity from nearly fresh to full oceanic water¹⁹. Atlantic cod in the North East Atlantic are divided into 14 separate stocks which remain largely separate from one another. Important stocks in European waters are the North Sea, Skagerrak, Western Baltic, Eastern Baltic, Celtic Sea, Irish Sea, and Western Scotland²⁰. The North East arctic cod is by far the largest stock of Atlantic cod in the world and the stock is known for doing long migrations from the Barents Sea to the coast of Norway to spawn during the winter.

Atlantic cod is among the most important of all commercial fishes and has been exploited ever since man began to fish in the seas of Europe. Today the major fishing grounds are in the North East Atlantic Ocean within the Barents Sea, Icelandic waters and the North Sea. In the 1950s to early 1990s there were significant commercial fisheries in the northwest Atlantic, but because of heavy overfishing the fish stock in Canadian waters collapsed²¹. In commercial fisheries Atlantic cod are mainly caught with bottom trawls, long lines, seines, gillnets and handlines.

¹⁶ EUMOFA has conducted a thorough analysis on the price structure in the supply chain of dried salted cod from Norway to Portugal which can be consulted here: <http://www.eumofa.eu/market-analysis#ptat>

¹⁷ <https://www.fishbase.de/summary/gadus-morhua.html>

¹⁸ <http://www.ices.dk/explore-us/projects/EU-RFP/EU%20Repository/ICES%20FishMap/ICES%20FishMap%20species%20factsheet-cod.pdf>

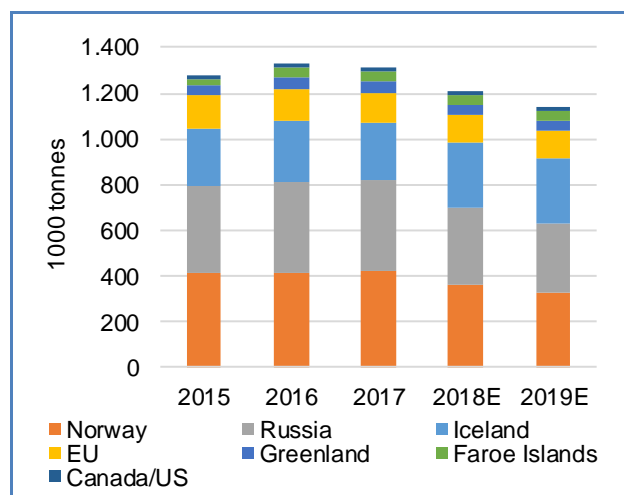
¹⁹ Cohen, D.M., T. Inada, T. Iwamoto and N. Scialabba, 1990. FAO species catalogue. Vol. 10. Gadiform fishes of the world (Order Gadiformes). An annotated and illustrated catalogue of cods, hakes, grenadiers and other gadiform fishes known to date. FAO Fish. Synop. 125(10). Rome: FAO. 442 p

²⁰ https://ec.europa.eu/fisheries/marine_species/wild_species/cod_en

²¹ <http://www.ices.dk/explore-us/projects/EU-RFP/EU%20Repository/ICES%20FishMap/ICES%20FishMap%20species%20factsheet-cod.pdf>

4.2. Global catch

Figure 44. **GLOBAL CATCHES OF ATLANTIC COD BY CATCHING NATION**

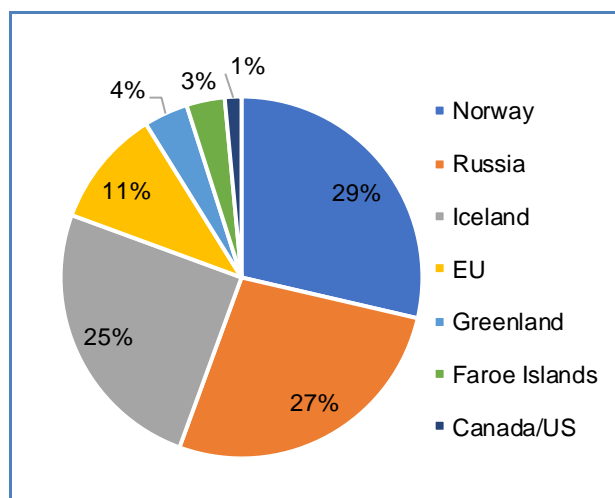


Source: FAO (2015, 2016, 2017) / Groundfish forum (2018 and 2019 estimates).

Since 2016, the global catch of Atlantic cod has been decreasing each year, from 1.329.000 tonnes in 2016 to an estimated catch of 1.139.000 tonnes in 2019²². The declining catch volumes are a consequence of reduced quotas in the most important commercial Atlantic cod fishery which takes place in the Barents Sea.

The largest catching nations of Atlantic cod are Norway, Russia and Iceland, accounting for 29%, 27% and 25% of the total, respectively (2019 estimates)²³. Norway's and Russia's cod fishery takes place in the Barents Sea, targeting the large Northeast arctic cod stock. The Icelandic commercial cod fishery takes place in the Icelandic Exclusive Fishing zone, where they manage and harvest from their own cod stock around the country.

Figure 45. **ESTIMATED GLOBAL CATCH OF ATLANTIC COD BY CATCHING NATION IN 2019**



Source: Groundfish forum.

4.1 EU catches of cod

The EU is estimated to cover 11% of global catches in 2019. The EU's commercial fishery of Atlantic cod takes place mostly in European waters in the North Sea, the Baltic Sea and the Barents Sea.

In 2016, cod landed in the EU reached 92.000 tonnes worth EUR 226 million, ranking 9th in value terms among all species and representing 3% of the total value of EU landings²⁴. This was mostly driven by landings from the

²² FAO (2015, 2016, 2017) / Groundfish Forum (2018 and 2019 estimates).

²³ Groundfish Forum.

²⁴ EUMOFA - The EU fish market – 2018 Edition.

largest quota holders Denmark, the UK and Spain, as well as by landings in Poland and France. In total, volumes decreased by 12% and value decreased by 8% compared to 2015.

Of the top three EU players in the cod fishery, Denmark, the UK and Spain, only the UK experienced an increasing trend from 2015 to 2016, by 17% in volume and 11% in value²⁵.

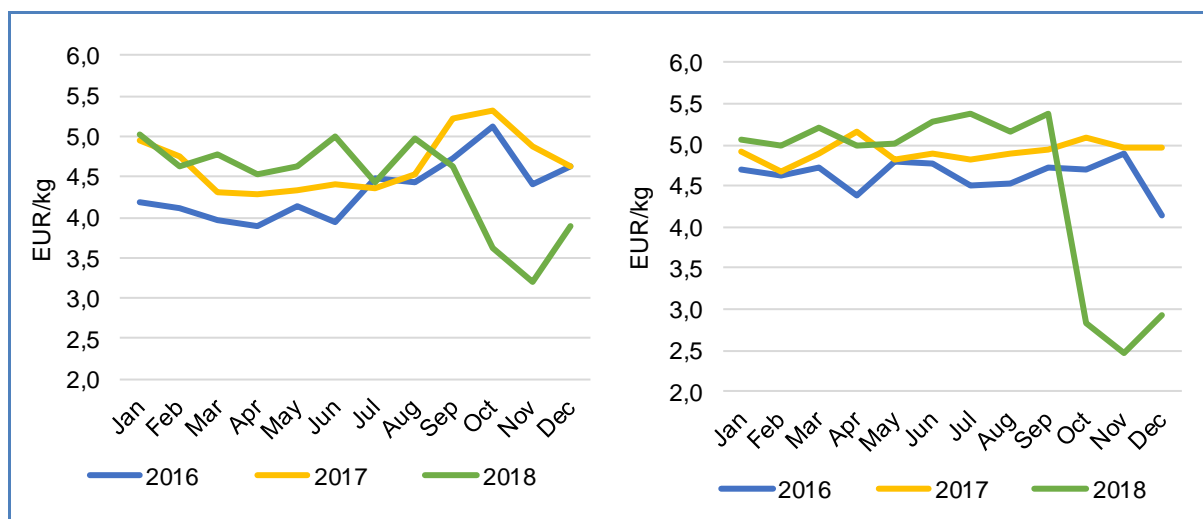
Table 4. **LANDINGS OF ATLANTIC COD IN THE EU BY MEMBER STATE (volume in 1000 tonnes, value in EUR million)**

EU Member State	2012		2013		2014		2015		2016		2017	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	24	54	18	45	21	51	23	56	20	56	n/a	n/a
UK	11	32	12	31	13	35	14	44	17	49	18	57
Spain	16	35	18	44	19	56	20	60	15	44	15	40
France	10	28	11	31	7	19	6	21	8	27	8	35
Poland	19	27	14	19	14	18	17	18	13	16	11	14
Germany	7	20	7	14	10	21	8	22	5	15	1	4
Sweden	9	15	6	10	6	9	6	8	5	8	4	7
Other	10	12	12	7	9	7	11	14	8	10	7	8
Total	106	222	98	202	97	215	104	244	92	226	65	166

Source: Eurostat.

In Denmark, the first-sales price of Atlantic cod decreased throughout the last months of 2018; but the average price for the year was 4,71 EUR/kg, a 2% increase from the year before. The same trend was noticed in the UK where landing price decreased by the end of the year and averaged at 5,08 EUR/kg, a 3% increase from the year before.

Figure 46. **FIRST-SALES PRICES OF COD IN DENMARK (LEFT) AND THE UK (RIGHT)**



Source: EUMOFA.

²⁵ Eurostat figures for 2017 are incomplete as Danish data are not available.

4.2 Extra-EU imports

Most of the fisheries and aquaculture products imported in the EU originate in Norway. Denmark and Sweden are the main entry points for Norwegian products into the internal market.

In 2017, EU imports of cod were 513.000 tonnes valued at EUR 2,4 billion. Norway was the main supplier, providing 182.404 tonnes valued at EUR 864 million. This represented 36% of cod imported by third countries in both volume and value terms. A 5% price increase from 4,48 to 4,71 EUR/kg caused a total value growth of EUR 80 million, 3% more than 2016, for all countries.

Russia and Iceland are also relevant suppliers of cod, responsible for 22% (111.000 tonnes) and 18% (93.000 tonnes), respectively, of total extra-EU imports of the species in volume terms.

During January–November 2018, total import volumes from all suppliers reached 458.000 tonnes valued at EUR 2,3 billion.

Most of the cod imported to the EU consist of frozen products. In 2017, imports of frozen cod reached EUR 1,3 billion and 325.000 tonnes, a 4% increase in value and a 2% decrease in volume from 2016. Imports of fresh products increased by 7% in terms of both volume and value while there were 2% decrease in value and a 9% decrease in volume for the salted products. Dried products decreased by 3% in value and 8% in volume from 2016. During January–November 2018, import value of salted and dried products exceeded total value in 2017, mainly due to a 7% increase of their price.

In general, there was a 5% increase in import prices of all cod products in 2017. This trend has continued throughout 2018 for all categories except for fresh products, whose price showed a 1% decrease in January–November compared to the average price in 2017. The largest price growth was seen for frozen products (+8%).

Table 5. **EU IMPORTS OF COD BY MEMBER STATE (volume in 1000 tonnes, value in EUR million)**

EU Member State	2013		2014		2015		2016		2017		Jan- Nov 2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Netherlands	112	370	136	464	126	528	130	561	146	652	120	589
UK	87	364	89	396	88	474	91	463	80	435	72	410
Sweden	68	256	77	286	78	370	78	379	78	395	74	400
Denmark	70	243	78	267	79	315	82	327	82	348	77	342
Germany	25	125	31	151	25	152	27	172	23	148	19	134
Portugal	21	57	15	46	18	57	21	66	20	70	27	103
Spain	22	57	28	79	25	91	26	100	24	102	19	88
Other	50	161	56	176	46	188	64	251	60	248	49	224
Total	456	1.632	510	1.864	486	2.175	519	2.318	513	2.398	458	2.290

Source: EUMOFA.

Table 6. **EU IMPORTS OF COD BY PRESERVATION (volume in 1000 tonnes, value in EUR million)**

Preservation	2013		2014		2015		2016		2017		Jan- Nov 2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Frozen	273	814	317	989	301	1.155	332	1.260	325	1.309	273	1.187
Live/Fresh	78	340	89	378	86	430	89	460	95	490	95	489
Dried	38	215	36	215	35	263	35	272	32	263	30	265
Salted	55	201	55	215	51	251	52	253	47	248	46	257
Unspecified	12	60	12	66	13	75	12	71	14	87	14	92
Prepared/preserved	0	1	0	1	0	1	0	1	0	0	0	0
Total	456	1.632	510	1.864	486	2.175	519	2.318	513	2.398	458	2.290

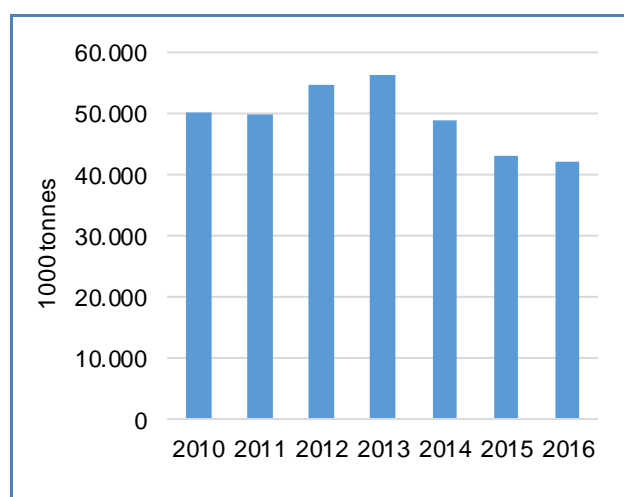
Source: EUMOFA.

Table 7. **EU IMPORTS OF COD BY MAIN SUPPLIERS** (volume in 1000 tonnes, value in EUR million)

Supplier	2013		2014		2015		2016		2017		Jan - Nov 2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Norway	168	600	195	683	174	790	179	820	182	864	162	825
Iceland	92	452	92	495	91	559	103	621	93	585	95	596
Russia	80	233	96	297	92	347	98	369	111	446	96	415
China	60	198	69	221	64	255	68	274	60	266	50	234
Faroe Islands	14	55	16	63	19	88	19	87	20	98	20	104
Greenland	12	25	17	37	20	45	26	61	25	61	19	47
Other	30	69	25	69	27	91	26	85	20	78	16	70
Total	456	1.632	510	1.864	486	2.175	519	2.318	513	2.398	458	2.290

Source: EUMOFA.

4.3 Cod processing in the EU

Figure 47. **PRODUCTION OF DRIED SALTED COD IN PORTUGAL** (volume in tonnes)

Source: Instituto Nacional De Estatística.

The EU has a significant fish processing industry with the total number of being 3.603 enterprises in 2015²⁶. The industry processes a variety of species into fillets, different preserved products and ready meals. Within the EU, Atlantic cod is the most important for the Portuguese salted-dried cod industry but is also widely used as raw material in other EU Member States²⁷. After Norway, Portugal is the world's second largest producer of dried-salted cod, amounting to 42.270 tonnes in 2016. In the period 2013–2016, production has dropped by 25% in relation to reduced global catches of Atlantic cod.

4.4 Extra-EU export

Exports of cod to non-EU countries are far lower than imports. Volumes exported in 2017 were 27.600 tonnes, slightly increasing compared with 2013, while in value terms a growth of EUR 30 million was recorded, as they reached EUR 150 million in 2017.

Brazil is the largest market of cod exported from the EU. In 2017, exports to this country reached 7.700 tonnes worth EUR 58 million, mainly coming from Portugal and consisting of frozen product (65% of total volume) and dried products (almost 30% of the total).

²⁶ Scientific, Technical and Economic Committee for Fisheries (STECF) – Economic report of the EU fish processing sector 2017 (STECF-17-16). Publications Office of the European Union, Luxembourg, 2018, ISBN 978-92-79-67495-2, doi:10.2760/24311 JRC111988

²⁷ Scientific, Technical and Economic Committee for Fisheries (STECF) – Economic report of the EU fish processing sector 2017 (STECF-17-16). Publications Office of the European Union, Luxembourg, 2018, ISBN 978-92-79-67495-2, doi:10.2760/24311 JRC111988

Norway and China are also important export markets of cod for the EU. In 2017, they respectively imported 4.100 tonnes worth EUR 21 million and 7.200 tonnes worth EUR 17 million. The value of cod exports to both countries has increased significantly in the period 2013–2017.

Exports to Norway mainly consist of frozen cod landed by EU vessels in Norway and prepared/preserved cod products supplied from the processing industry in Latvia and Lithuania. Exports to China mainly include frozen cod headed and gutted exported by Denmark and the Netherlands but originally entering the EU market from Norway and Russia.

Table 8. **EU EXPORTS OF COD BY MEMBER STATE (volume in 1000 tonnes, value in EUR million)**

EU Member State	2013		2014		2015		2016		2017		Jan- Nov 2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Portugal	14	79	15	84	10	72	10	67	11	79	10	71
Denmark	2	6	2	5	3	9	6	17	7	23	5	23
Latvia	0	0	0	0	0	0	0	2	1	11	1	14
UK	2	5	1	4	1	6	1	6	2	7	1	6
Germany	4	11	2	8	2	8	2	9	1	7	2	7
Spain	4	10	4	12	3	9	2	8	1	6	1	6
France	0	2	0	2	0	3	0	4	1	6	1	7
Lithuania	0	0	0	1	0	1	1	1	2	4	2	5
Other	2	8	2	8	2	11	3	14	2	9	4	15
Total	27	122	27	124	22	119	27	129	28	150	27	154

Source: EUMOFA.

Table 9. **EU EXPORTS TO MAIN MARKETS OUTSIDE THE EU (volume in 1000 tonnes, value in EUR million)**

Country	2013		2014		2015		2016		2017		Jan- Nov 2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Brazil	10	59	11	62	7	50	7	47	8	58	6	51
Norway	4	11	2	7	2	8	3	12	4	21	4	23
China	4	8	4	8	3	9	7	18	7	17	7	16
Switzerland	1	9	1	8	1	11	2	13	2	17	2	20
USA	1	6	1	5	1	7	1	7	2	11	2	12
Angola	3	14	3	16	2	13	1	9	1	8	1	8
Canada	0	1	0	1	0	2	0	2	1	3	1	5
Nigeria	1	2	1	2	1	2	1	1	1	2	0	1
Other	3	13	4	15	4	18	5	18	3	13	4	18
Total	27	122	27	124	22	119	27	129	28	150	27	154

Source: EUMOFA.

4.5 Intra-EU export

The three largest intra-EU exporters are the Netherlands, Denmark, and Sweden. They accounted for 68% of the volume and 67% of the value in terms of cod trade in the EU in 2017. Intra-EU exchange of cod experienced a 4% growth in value and 5% decrease in volume in 2017. All top three players contributed to the upward value trend in 2017 while only Sweden showed an increase in volume.

Table 10. **INTRA-EU EXPORTS OF COD BY MEMBER STATE** (volume in 1000 tonnes, value in EUR million)

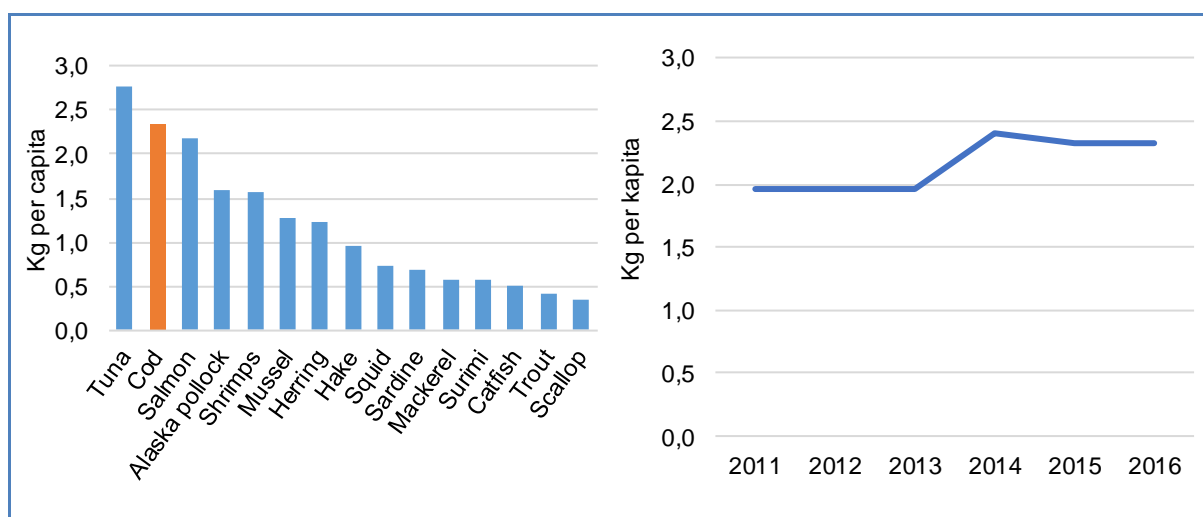
EU Member State	2013		2014		2015		2016		2017		Jan- Nov 2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Netherlands	65	236	97	349	116	506	148	561	126	609	177	585
Denmark	81	358	85	382	88	420	88	452	84	458	72	408
Sweden	59	225	66	242	69	324	72	343	75	361	64	348
Germany	46	198	49	226	46	242	46	262	38	224	34	211
Poland	18	82	17	76	18	93	19	105	23	132	19	113
Spain	21	70	19	77	20	93	20	95	20	96	20	94
Lithuania	8	31	9	39	9	47	13	68	14	72	12	64
UK	15	60	14	59	14	64	15	63	14	63	12	56
Other	23	102	21	102	21	111	21	115	24	130	22	126
Total	334	1.362	377	1.553	403	1.901	442	2.066	419	2.144	432	2.004

Source: EUMOFA.

4.6 Consumption

Cod is one of the most consumed fish species in the EU. With a per capita apparent consumption²⁸ of 2,33 kg, in 2016 it ranked second after tuna. Compared with 2011, when its consumption amounted to 1,92 kg, 2016 consumption was up by 21%. This was mainly caused by an increased extra-EU imports driven by increased foreign catches by Norway, Iceland and Russia over the period²⁹.

In the EU, Atlantic cod is consumed in a variety of different preparations, either as fresh, de-frozen, salted or dried. Atlantic cod is especially known for being considered as an iconic ingredient in Portuguese cuisine, as salted and dried cod, and there is said to be over 1000 cod recipes in Portugal alone³⁰.

Figure 48. **PER CAPITA APPARENT CONSUMPTION OF MAIN COMMERCIAL SPECIES IN THE EU IN 2016 (volume in kg) (LEFT) AND PER CAPITA APPARENT CONSUMPTION OF COD IN THE EU (volume in kg) (RIGHT)**

Source: EUMOFA.

²⁸ Data on apparent consumption come from the supply balance developed by EUMOFA: <http://www.eumofa.eu/supply-balance>

²⁹ FAO, Eurostat, ICES and Kontali Monthly Cod Report (December 2017)

³⁰ <http://www.centerofportugal.com/codfishroute/>

5 Case study – EU consumer habits regarding fishery and aquaculture products

The latest Eurobarometer survey on EU consumer choices regarding fishery and aquaculture products³¹ (FAPs) shows that more than four out of ten Europeans eat seafood at least once a week at home. Price is the main barrier to increased consumption. Regional, national and EU products in general benefit from a very strong consumer preference.

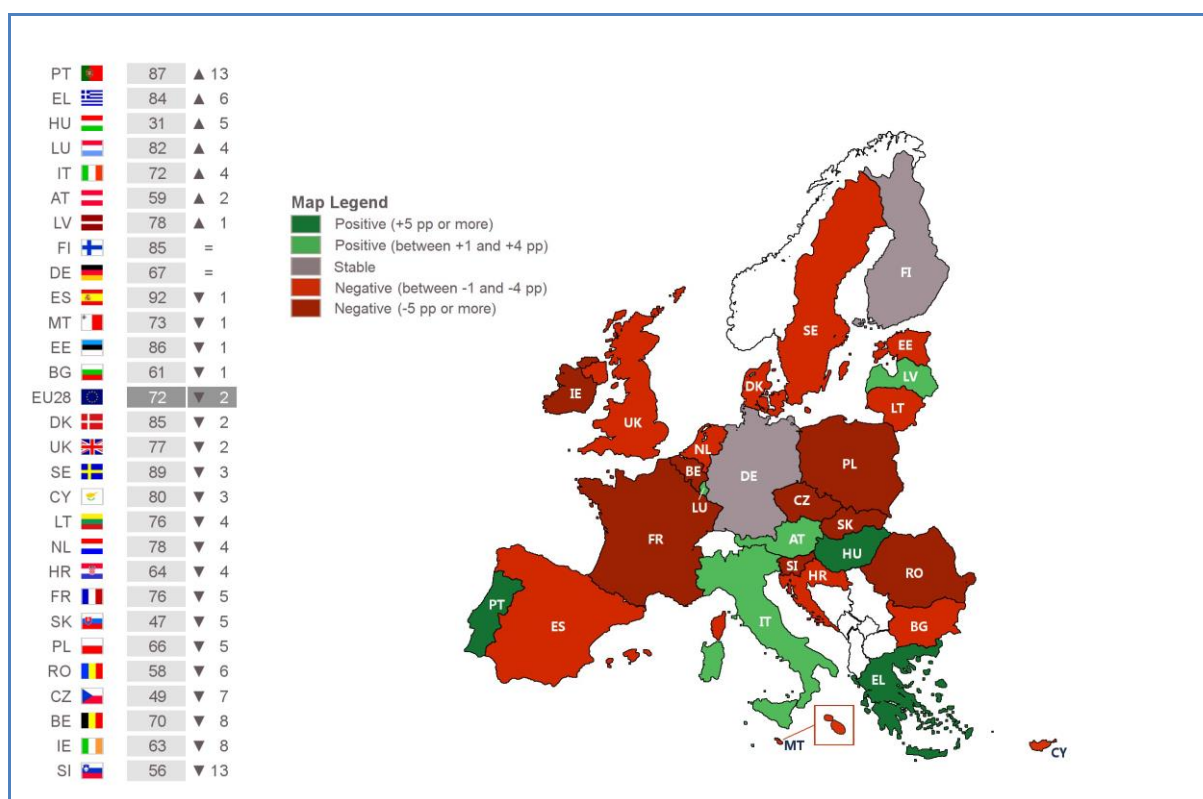
This survey was carried out for the European Commission between 23rd of June and 6th of July 2018. A total of 27.734 EU citizens from the 28 Member States, from different social and demographic backgrounds, were interviewed face-to-face at home and in their native language. This special Eurobarometer survey is the second on this topic, repeating questions first asked in a survey conducted in June 2016. It aims to improve understanding of the EU internal market for FAPs.

5.1. Frequency of consumption

One of the main findings of the Eurobarometer survey is that the majority of Europeans eat FAPs at least once a month: the majority at home (70%) and fewer in restaurants (32%).

Moreover, the comparison to the 2016 survey, shows only minor changes in the proportion of respondents in the majority of countries who say they eat FAPs at least once a month (–2 percentage points in total).

Figure 49. HOW FREQUENTLY RESPONDENTS EAT FISHERIES OR AQUACULTURE PRODUCTS AT LEAST ONCE A MONTH (%) – EVOLUTION COMPARED TO THE 2016 SURVEY

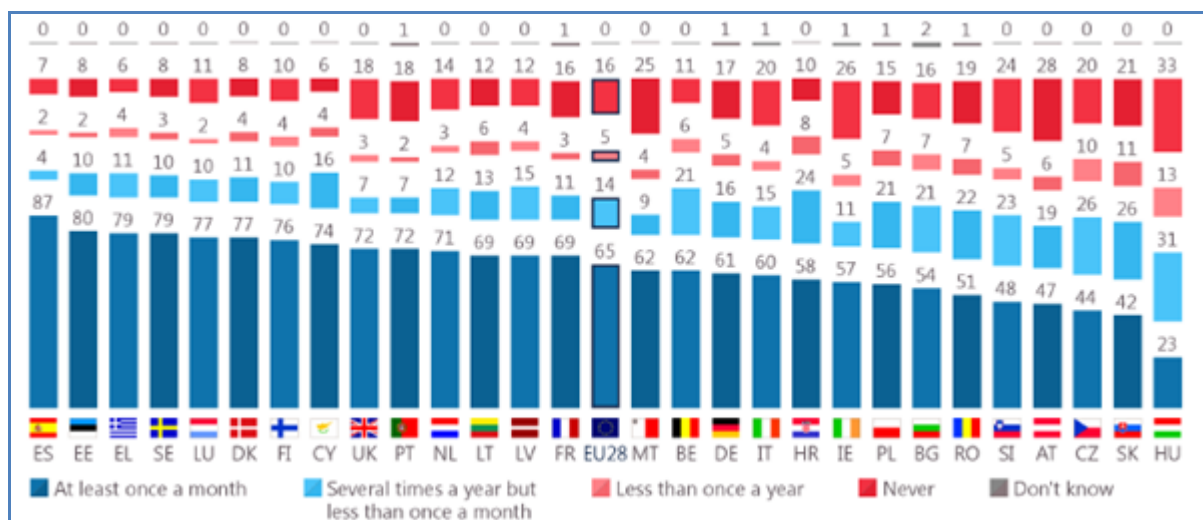


Source: Eurobarometer.

³¹<http://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/survey/getsurveydetail/instruments/special/surveyky/2206>

Analysis at country level shows that in 23 out of 28 Member States, an absolute majority of respondents buy FAPs at least once a month. Overall, respondents from countries surrounded by water and by more numerous and diversified places of sale, are more likely to eat FAPs at least once a month, compared with those from land-locked countries. For example, respondents in Hungary (28%) are much less likely than those in Spain (92%) to eat these products at least once a month.

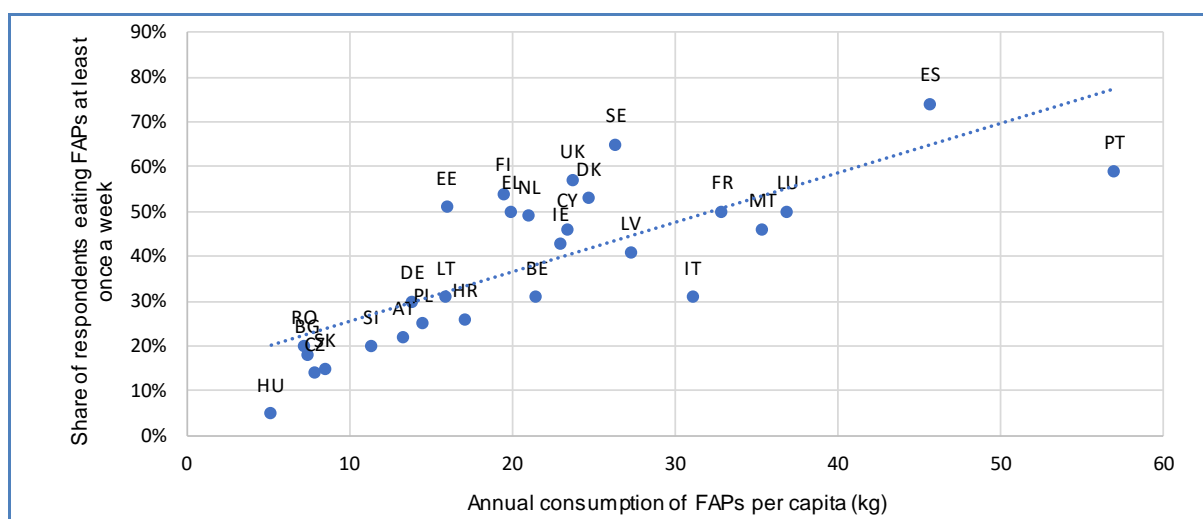
Figure 50. **HOW FREQUENTLY RESPONDENTS BUY FISHERIES AND AQUACULTURE PRODUCTS (%)**



Source: Eurobarometer.

At country level, the correlation between the share of respondents eating FAPs at least **once a week** and the **annual consumption per capita** is relatively obvious. We can see that very few differences exist between the yearly average consumption per capita ranking (top five including Portugal, Spain, Luxembourg, Malta, and France) and the share of respondents eating FAPs at least once a week.

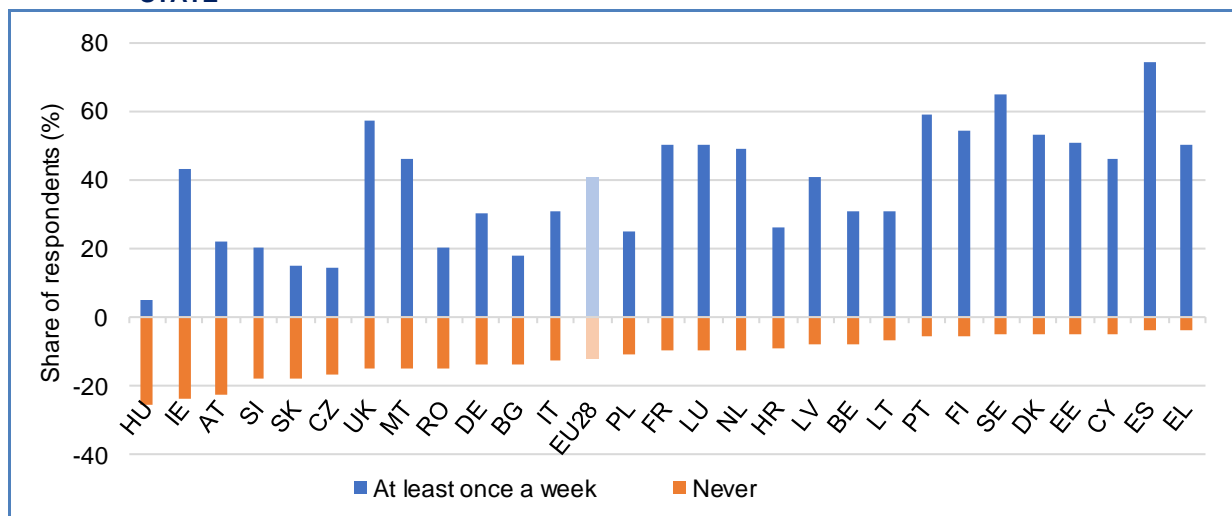
Figure 51. **RELATIONSHIP BETWEEN ANNUAL PER CAPITA CONSUMPTION (2016) AND SHARE OF REGULAR BUYERS (AT LEAST ONCE A WEEK)**



Source: EUMOFA elaboration from Eurobarometer data.

However, the share of non-consumer is not clearly related with the level of consumption per capita. Specifically, in the UK, Ireland and Malta, the share of respondents declaring they never eat FAPs is very high compared to the average level and frequency of consumption. This highlights significant heterogeneity in consumption of FAPs among consumers in these countries.

Figure 52. **SHARES OF REGULAR CONSUMERS AND SHARE OF NON-CONSUMERS BY MEMBER STATE**



Source: EUMOFA elaboration from Eurobarometer data. Countries are ranked in descending order according to the share of respondents saying they never eat FAPs.

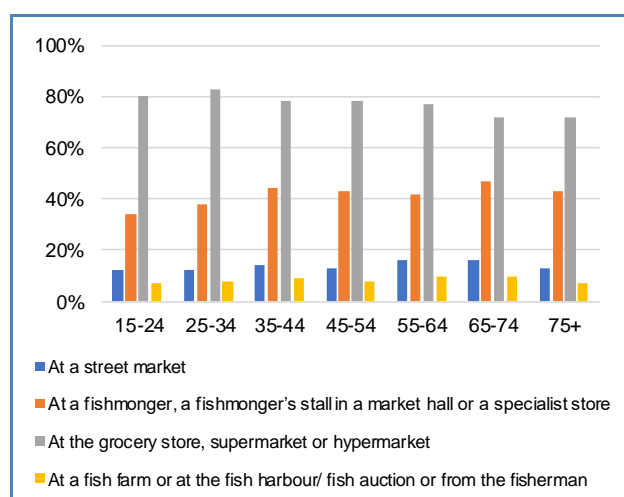
Moreover, the Eurobarometer study highlights several findings in terms of **socio-demographic trends among respondents**

- **Women** are slightly more likely than men to buy FAPs at least once a month (67% vs. 63%).
- **People aged 15–24** are less likely than older people to buy FAPs at least once a month (43% vs. 64%–70%).
- **Respondents with higher levels of education** are more likely to buy FAPs on a regular basis than those who finished their education at an earlier age.
- **Households** of two members are more likely to buy FAPs at least once a month compared to larger or smaller households (69% vs. 64%).

5.2. Place of purchase and types of products

According to the Eurobarometer survey, **grocery store, supermarket or hypermarket** are the most common place for buying FAPs (77% of respondents). Then comes **fishmonger or specialist shop (42%)**, and to a **lesser extent street markets (14%)**, and **directly from the producer (8%)**.

Figure 53. **RELATIONSHIP BETWEEN PLACE OF PURCHASE (MULTIPLE CHOICE QUESTION) AND AGE OF CONSUMERS**



Source: EUMOFA elaboration from Eurobarometer data.

In addition, the analysis of the relationship between age of the consumers and their place of purchase for fish products shows that:

- Respondents aged 55-74 are more likely to buy their fish products at a **street market** or **directly from the producer** than younger respondents.
- Respondents aged 35-44 and those aged 65-74 are more likely to go to the **fishmonger** to buy fish products than other age groups, especially younger age groups.
- The youngest consumers (aged 15-34) are more likely to buy their fish products at **supermarkets** or **grocery stores** than older consumers.

Preferences in terms of type of product and presentation are stable compared to the 2016 survey.

Concerning preferences in terms of **preservation state**, more than two thirds of respondents buy frozen (68%) or fresh products (67%), and over six in ten buy canned products (64%) 'at least from time to time', whilst a smaller proportion say they buy smoked, salted, dried or in brine products (51%) 'at least from time to time'. The majority of respondents (58%) say they rarely or never buy breaded products or ready-to-eat meals based on FAPs.

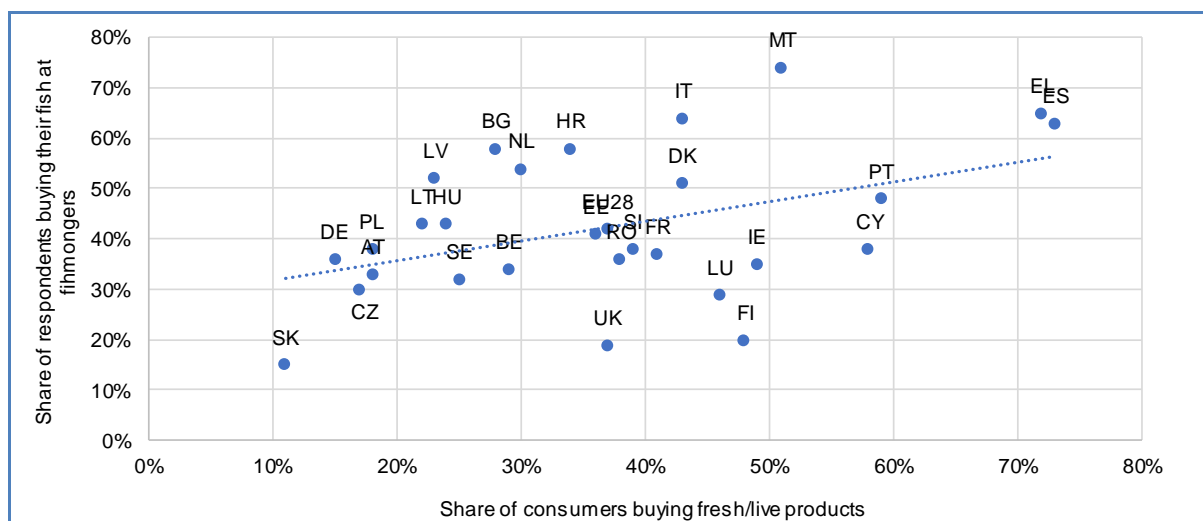
In terms of relationship between place of purchase and preservation state of products, respondents who buy **frozen products** are more likely to do so at a grocery store, supermarket or hypermarket (73%), or an online shop (72%), while those who buy **fresh products** are more likely to do so at a fish farm or at the fish harbour/ fish auction or from a fisherman (83%), at a fishmonger or a specialist store (81%) or at a street market (79%).

Concerning **presentation state**, more than two thirds of respondents say they buy loose products (68%) and pre-packed products (66%) 'at least from time to time'. Half of respondents prefer filleted products (50%) and four in ten prefer products that have been cleaned (40%), while more than a quarter prefer whole products (27%).

In terms of relationship between place of purchase and presentation state, respondents who buy **whole products** are more likely than those who buy cleaned products or fillets to buy at the fishmonger or specialist store (55% vs. 47% and 39%, respectively), and less likely to buy at the grocery store, supermarket or hypermarket (68% vs. 78% and 83%). In four countries – Greece, Romania, Croatia, and Cyprus – 'whole products' is the most popular response.

It is interesting to analyse this relationship by country, looking at the correlation between the share of respondents buying their fish at fishmongers and the share of consumers buying fresh/live fish products. The correlation is relatively obvious, with "Mediterranean/Southern" countries with a high preference for fresh products and fishmongers (Greece, Spain, Malta, Portugal, Cyprus) and landlocked/Central and Eastern countries (except RO) with low share of consumers going to the fishmonger and buying fresh products (Slovakia, Czech Republic, Austria, Poland, Germany).

Figure 54. **RELATIONSHIP BETWEEN SHARE OF RESPONDENTS BUYING THEIR FISH AT FISHMONGERS AND SHARE OF CONSUMERS BUYING FRESH/LIVE PRODUCTS**



Source: EUMOFA elaboration from Eurobarometer data.

5.3. Consumption drivers and non-consumption factors

According to the Eurobarometer survey, the reason EU consumers buy or eat FAPs is because they are healthy and taste good.

- A majority of respondents who buy or eat FAPs say they buy these products because 'they are healthy' (74%) and 'they taste good' (59%). These are the two most important reasons in all EU countries.
- The main reason given for not eating FAPs by those who never eat them is that they do not like their taste, smell or appearance (49%). This is the reason most frequently mentioned in most EU countries.

When purchasing FAPs, products' appearance and price are the most important criteria.

- The two main aspects mentioned by the majority of respondents as the most important when buying FAPs are the product's appearance (59%) and the cost of the product (52%). The origin of the product is the third most frequently mentioned aspect (41%).

Figure 55. **MOST IMPORTANT ASPECTS WHEN RESPONDENTS BUY FISHERIES AND AQUACULTURE PRODUCTS (MAX. 3 ANSWERS) (% - EU)**



Source: Eurobarometer.

The main barrier for EU consumers to increase their consumption of FAPs in the price.

- 70% respondents who buy or eat FAPs agree they would buy or eat more seafood if the price was not so high.
- Over half of these respondents (53%) say they would buy or eat more seafood if the choice and points of sale were more diversified.

A relative majority of Europeans prefer wild to farmed products, and sea to freshwater products.

- More than a third of the respondents who buy or eat FAPs prefer wild products (35%) while less than one in ten (9%) say they prefer farmed products. Nearly a third (32%) say they have no preference.
- Products coming from the sea are preferred by just over four in ten (42%), compared with less than one in ten who prefer freshwater products (8%). Again, there is a large proportion of respondents who do not have a preference for either sea or freshwater products (33%).

Most EU consumers prefer products from their own country or region.

- Over a third of respondents who buy or eat FAPs prefer products from their own country (37%), followed by products from their own region (28%), and products from the EU (16%).
- Only a quarter of respondents (24%) say they don't really have a preference as to where the products are from.

7 Global highlights

EU / Mediterranean / Fisheries: In February 2019, the European Commission reached an agreement to establish a multi-annual plan for fish stocks in the Western Mediterranean Sea. The aim is to restore demersal fish stocks back to sustainable levels, ensuring long term viability of fishers. Catches of these stocks have fallen by 23% since the early 2000's. Under this plan an EU fishing effort regime for all trawl vessels and a three-month closure for the protection of juveniles will be introduced. This plan covers the western Mediterranean Sea extending from the North Alboran Sea, through the Gulf of Lion to the Tyrrhenian Sea³².



RFMO / SPRFMO: The 7th annual meeting of the Commission of the South Pacific Regional Fisheries Management Organization (SPRFMO) concluded with good progress made on fisheries issues, compliance and the fight against Illegal, Unreported and Unregulated (IUU) fishing. The SPRFMO adopted a new bottom fisheries framework based on a spatial management approach. Agreement was reached on EU proposals to strengthen and reinforce the fight against IUU fishing and aligning port inspection provisions with the FAO Port State Measures Agreement. Moreover, the SPRFMO adopted an EU proposal to prevent marine plastic pollution³³.

EU / Surimi / Supply: The European market for surimi has stagnated recently, especially in France: surimi sales are declining, and raw material prices have been rising. The US surimi industry shares the same problems as Europe when it comes to raw material prices, as the cost of Alaska pollock and Pacific whiting have risen³⁴.

Chile / IUU: New laws in Chile have been adopted to increase the power of the National Fisheries and Aquaculture Service in their fight against IUU fishing. Under the new rules, service officials will have greater powers when conducting investigations and courts will be allowed to impose harsher penalties³⁵.

South Africa / Namibia / IUU: In January 2019, South Africa and Namibia joined forces to combat IUU fishing. As part of the agreement, a specialized joint working group has been established to manage and protect the shared marine resources, this includes the determination of the total allowable catch for stocks in the area³⁶.

³² https://ec.europa.eu/fisheries/press/agreement-first-ever-multi-annual-fisheries-management-plan-western-mediterranean_en

³³ https://ec.europa.eu/fisheries/press/progress-fisheries-management-south-pacific-ocean-more-work-still-needed-iuu-budget_en

³⁴ <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1176208/>

³⁵ <https://www.fis.com/fis/worldnews/worldnews.asp?l=e&country=0&special=&monthyear=&day=&id=101437&ndb=1&df=0>

³⁶ <https://www.businesslive.co.za/bd/national/2019-01-24-sa-joins-forces-with-namibia-to-tackle-illegal-fishing/>

8 Macroeconomic Context

7.1 Marine fuel

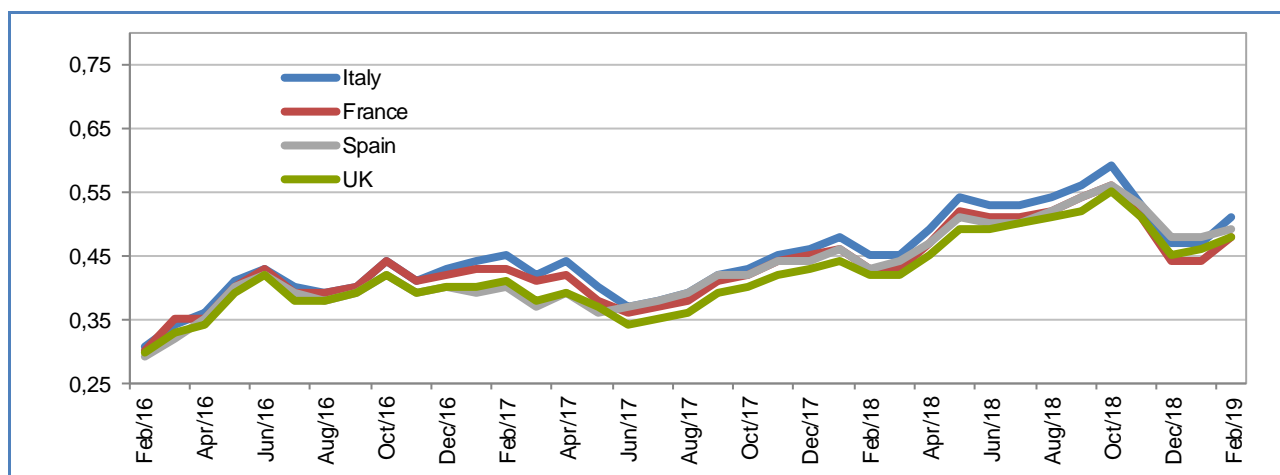
Average prices for marine fuel in **February 2019** ranged between 0,48 and 0,51 EUR/litre, in ports in **France, Italy, Spain,** and the **UK**. These prices were about 6% higher compared with the previous month and 13% higher compared with the same month a year ago.

Table 10. AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)

Member State	Feb 2019	Change from Jan 2018	Change from Feb 2018
France (ports of Lorient and Boulogne)	0,48	9%	12%
Italy (ports of Ancona and Livorno)	0,51	9%	13%
Spain (ports of A Coruña and Vigo)	0,49	2%	14%
The UK (ports of Grimsby and Aberdeen)	0,48	4%	14%

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

Figure 56. 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 1,4% in December 2018, down from 1,5% in December 2018. A year earlier, it was 1,3%.

Inflation: lowest rates in January 2019, compared with December 2018.



Inflation: highest rates in January 2019, compared with December 2018.

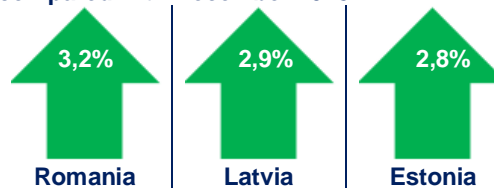


Table 11. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

HICP	Jan 2017	Jan 2018	Dec 2018	Jan 2019	Change from Dec 2018	Change from Jan 2018
Food and non-alcoholic beverages	101,71	103,99	104,73	105,45	↑ 0,69%	↑ 1,40%
Fish and seafood	106,56	109,43	109,61	111,05	↑ 1,31%	↑ 1,48%

Source: Eurostat.

7.3 Exchange rates

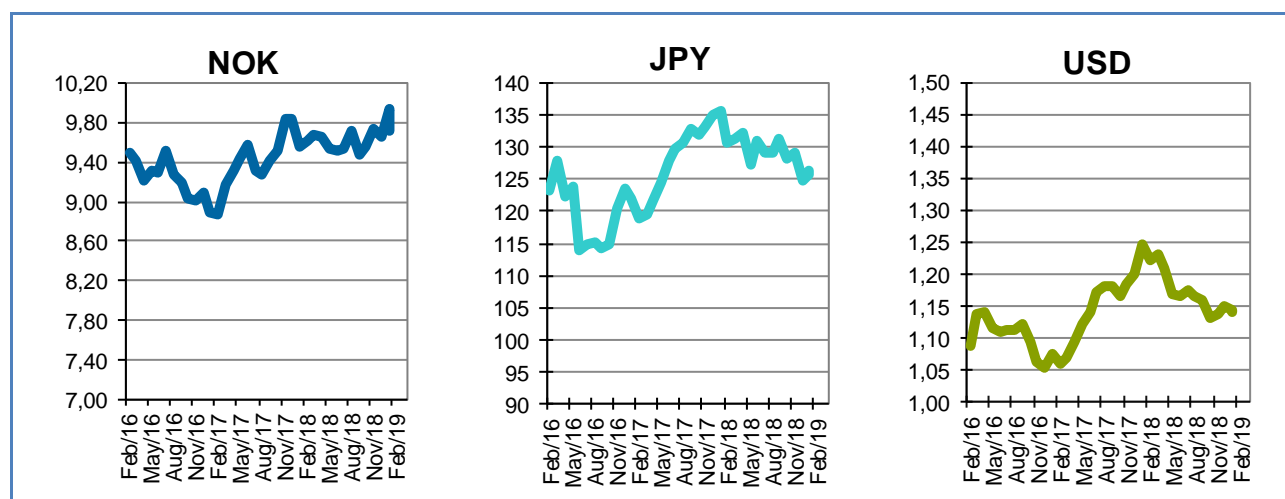
Table 12. EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Feb 2017	Feb 2018	Jan 2018	Feb 2019
NOK	8,8693	9,6153	9,6623	9,7268
JPY	118,83	130,72	124,81	126,44
USD	1,0597	1,2214	1,1488	1,1416

Source: European Central Bank.

In February 2019, the euro appreciated against the Japanese yen (+0,5%), and depreciated against the US dollar (-0,3%) and the Norwegian krone (-2,2%) from January 2019. For the past six months, the euro has fluctuated around 1,14 against the US dollar. Compared with February 2018, the euro has depreciated 6,5% against the US dollar, 3,3% against the Japanese yen. It appreciated 1,2% against the Norwegian krone.

Figure 57. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

Manuscript completed in February 2019

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PDF ISSN 2314–9671

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

First sales: European Commission, VU University Amsterdam, Wildscreen Arkive, FAO, ICES, Institute of Marine Research (IMR), MarLIN, Center for Environment Fisheries and Aquaculture Science, European Council, Seafish.org.

Consumption: EUROPANEL, ICES.

Case studies: Fishbase, Wikipedia, FAO, European Commission, Eurostat, Instituto Nacional De Estatística, Portugal, Scientific, Technical and Economic Committee for Fisheries (STECF), Eurobarometer.

Global highlights: European Commission, FAO, MSC, Fis.com, BusinessDay.

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

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

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

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

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

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

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