

# Monthly Highlights

No. 3 / 2019

E U M O F A

European Market Observatory for  
Fisheries and Aquaculture Products

## In this issue

In January 2019, first-sales value and volume grew in Denmark, Estonia, Norway, and Portugal over January 2018. In the same period, they experienced downward trends in Belgium, Italy, Latvia, Lithuania, the Netherlands, Sweden, and the UK.

In the period February 2016–January 2018, the average price of Atlantic herring in the Netherlands was 1,01 EUR/kg, followed by Denmark (0,54 EUR/kg), and Sweden (0,37 EUR/kg). That of Mediterranean horse mackerel was the highest in Portugal (3,73 EUR/kg), followed by France (2,44 EUR/kg), and Italy (1,55 EUR/kg).

Import prices of frozen tropical shrimp (genus *Penaeus*, CN code 03061792) from Ecuador fell significantly in the last week of February 2019, down by 10,5% to 5,24 EUR/kg. At the same time, volume rose by 6,3% to 1.250 tonnes.

In 2018, the average price of fresh monk for household consumption in France was 16,65 EUR/kg, 41% higher than in Spain (11,84 EUR/kg).

In 2018, landings of Morocco's coastal fisheries reached 1,3 million tonnes for a first sale value of 7,35 billion Moroccan dirhams (MAD) or EUR 663 million.

The US is the largest export market for fresh whole turbot from the EU. In 2018, EU exports of turbot to the US amounted to 119 tonnes.

The European Parliament has voted in favour of the Sustainable Fisheries Partnership Agreement between the EU and Morocco. The agreement, valid for 4 years, allocates fishing opportunities for around 130 vessels from 10 EU Member States in the fishing grounds of Morocco and Western Sahara.



Meet us at  
Seafood Expo Global in Brussels,  
7–9 May, Hall 7 – 1411  
and  
European Maritime Day in Lisbon,  
16–17 May, Stand 45

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# 1 First sales in Europe

In **January 2019**, 11 EU Member States (MSs) and Norway reported first-sales data for 11 commodity groups<sup>1</sup>. First-sales data are based on first-sales notes and data collected from auction markets.

## 1.1 In January 2019

**Increases in value and volume:** First sales grew in Denmark, Estonia, Norway and Portugal. The increases were particularly high in Norway and Denmark due mainly to higher harvests of small pelagics. In Portugal, the rise was linked to a higher supply of cephalopods (octopus, squid, and cuttlefish).

**Decreases in value and volume:** First sales dropped in Belgium, Italy, Latvia, Lithuania, the Netherlands, Sweden, and the UK. The decrease was particularly sharp in Sweden due to lower harvests of herring and sprat – the species that account for 90% of total first-sales volume in the country.

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

|         | January 2017 |        | January 2018 |        | January 2019 |        | Change from January 2018 |       |
|---------|--------------|--------|--------------|--------|--------------|--------|--------------------------|-------|
| Country | Volume       | Value  | Volume       | Value  | Volume       | Value  | Volume                   | Value |
| BE      | 1.918        | 5,63   | 1.724        | 5,79   | 1.466        | 5,08   | -15%                     | -12%  |
| DK      | 24.113       | 31,25  | 24.388       | 29,34  | 28.383       | 31,69  | 16%                      | 8%    |
| EE      | 5.130        | 1,10   | 5.818        | 1,09   | 6.209        | 1,09   | 7%                       | 1%    |
| FR      | 15.914       | 56,17  | 14.569       | 54,71  | 15.586       | 52,74  | 7%                       | -4%   |
| IT**    | 5.291        | 18,44  | 5.863        | 22,22  | 5.150        | 22,01  | -12%                     | -1%   |
| LV      | 6.318        | 1,31   | 5.100        | 0,91   | 4.757        | 0,82   | -7%                      | -10%  |
| LT      | 181          | 0,24   | 170          | 0,20   | 125          | 0,14   | -27%                     | -28%  |
| NL      | 5.674        | 20,25  | 12.162       | 24,25  | 11.352       | 23,32  | -7%                      | -4%   |
| NO      | 239.025      | 220,65 | 210.418      | 179,18 | 255.137      | 221,52 | 21%                      | 24%   |
| PT      | 4.378        | 15,40  | 5.782        | 13,95  | 6.564        | 16,10  | 14%                      | 15%   |
| SE      | 6.979        | 4,81   | 12.019       | 7,17   | 4.512        | 4,43   | -62%                     | -38%  |
| UK      | 60.541       | 87,65  | 42.715       | 61,71  | 27.580       | 55,00  | -35%                     | -11%  |

Source: EUMOFA (updated 21.03.2019).

\* Volume data is reported in net weight for the EU MSs and in live weight equivalent (lwe) for Norway. Prices are reported in EUR/kg (without VAT). For Norway, they are reported in EUR/kg of live weight.

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

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

<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 First sales in selected countries


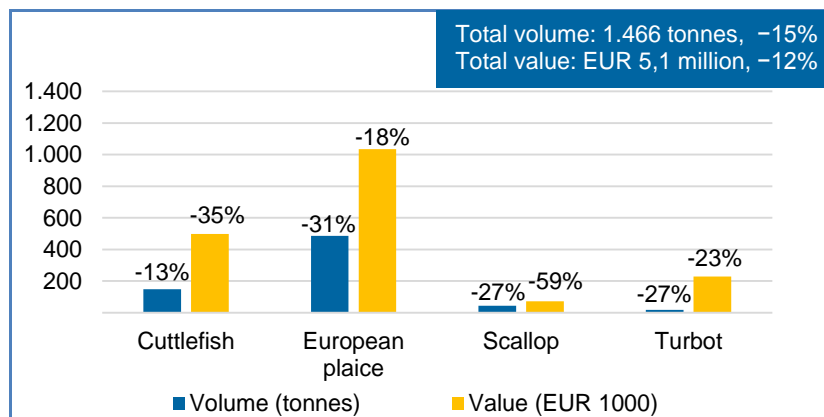
 In **Belgium** in **January 2019**, both value and volume were lower compared with January 2018. In addition to scallop, cuttlefish, European plaice and turbot were responsible for these trends. Of the top valued species, the average price of European plaice increased by 19% to 2,13 EUR/kg due to its lower supply, while that of cuttlefish decreased by 25% to 3,34 EUR/kg, although its volume was lower compared to January 2018.

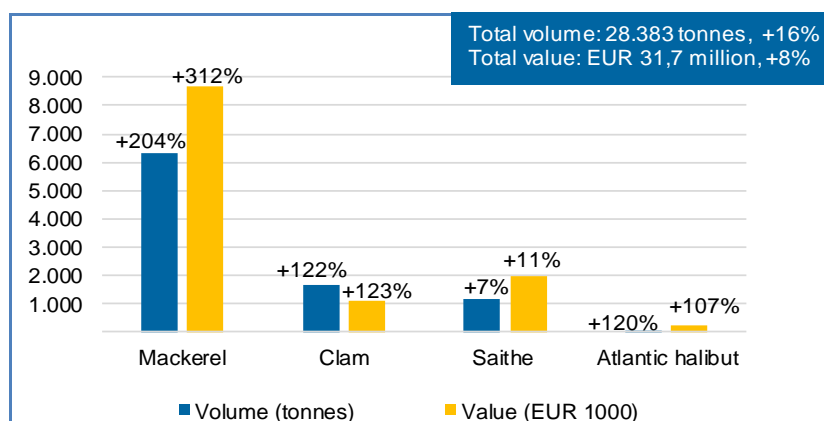
Figure 1. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN BELGIUM, JANUARY 2019**



Percentages show change from previous year.  
Source: EUMOFA (updated 14.03.2019).

 In **Denmark** in **January 2019**, first sales increased in both value and volume, compared to January 2018. First sales increases were triggered by high mackerel supply. Other major contributing species include clam, saithe, and Atlantic halibut. Among the main species, average prices increased remarkably for mackerel (+36%, to 1,37 EUR/kg), and for Norway lobster (+21%, to 7,56 EUR/kg), whereas a large decrease was recorded for shrimp *Crangon* spp. (-45%, 2,78 EUR/kg) and blue mussel (-52%, 0,09 EUR/kg).

Figure 2. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN DENMARK, JANUARY 2019**



Percentages show change from previous year.  
Source: EUMOFA (updated 15.01.2019).


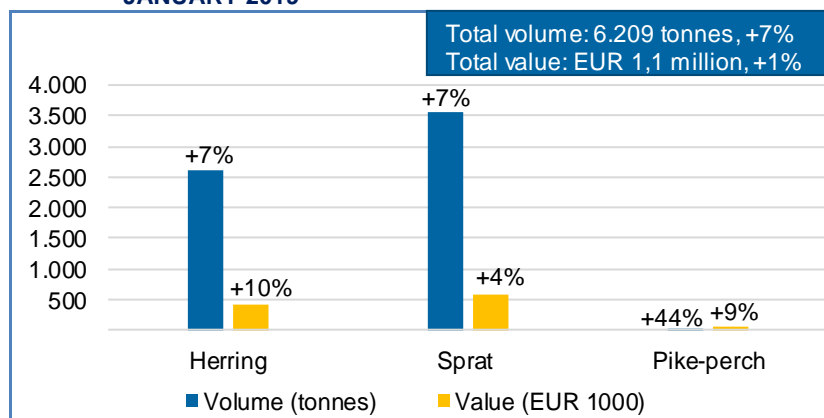
 In **Estonia** in **January 2019**, the value growth recorded for herring (+EUR 40,000) was the biggest contributor to the slight increase in overall first-sales value, whereas sprat (+248 tonnes) was responsible for the increase in volume terms. The higher supply of sprat caused the decrease in its average price (-3%, to 0,17 EUR/kg). The higher supply of herring followed a rise in its average price, which grew by 3% to 0,16 EUR/kg.

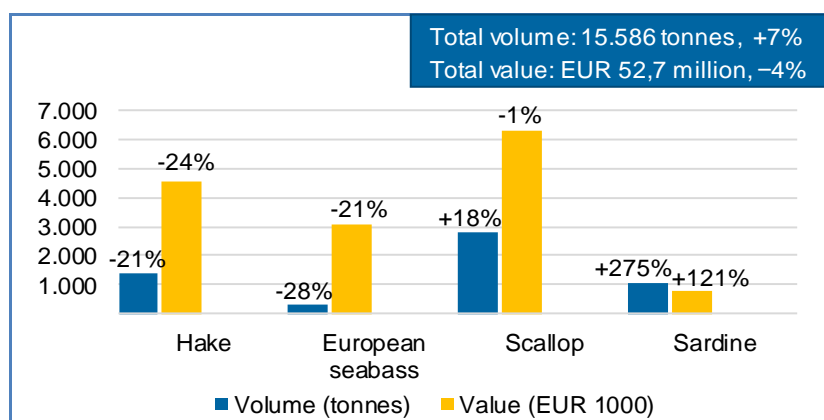
Figure 3. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN ESTONIA, JANUARY 2019**



Percentages show change from previous year.  
Source: EUMOFA (updated 14.03.2019).

**France** In **France** in **January 2019**, first-sales value decreased, while volume increased compared to January 2018. Hake and European seabass were the main species responsible for the decline in value, whereas sardine and scallop were the key contributors to volume growth. Among the top valued species, prices grew for European seabass (+11%, 10,37 EUR/kg) and pollack (+31%, 6,85 EUR/kg) due to lower first-sales volume. Scallop and cuttlefish registered decreases in average price by 16% (to 2,26 EUR/kg) and 13% (to 4,16 EUR/kg), respectively.

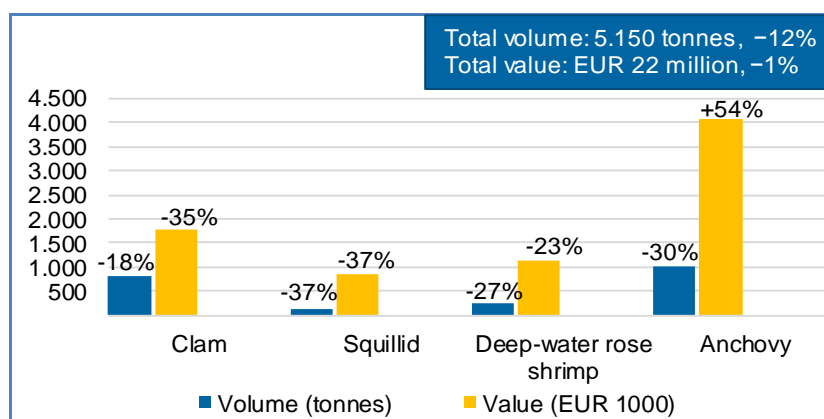
Figure 4. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN FRANCE, JANUARY 2019**



Percentages show change from previous year.  
Source: EUMOFA (updated 14.03.2019).

**Italy** In **Italy** in **January 2019**, first sales decreased in both value and volume relative to the same month in 2018. Clam and squillid were the main species contributing to the decreases along with deep-water rose shrimp and hake. Anchovy, the species that accounts for 20% of total volume, significantly contributed to the overall volume decrease. Average prices decreased significantly for clam (-21% to 2,17 EUR/kg) and hake (-19% to 4,50 EUR/kg). Among the top valued species, anchovy recorded the highest price increase (+119%).

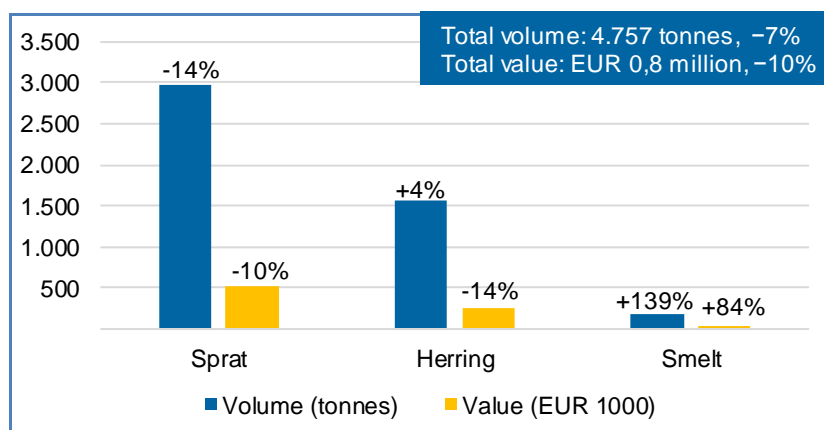
Figure 5. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN ITALY, JANUARY 2019**



Percentages show change from previous year.  
Source: EUMOFA (updated 14.03.2019).

**Latvia** In **Latvia** in **January 2019**, first sales declined compared to January 2018. A lower supply of sprat and a decrease in average price of herring (-18%), which occurred due to an increase in its volume, were the key reasons for the negative trend in value terms. First-sales volume decreased due, exclusively, to sprat (-496 tonnes). The average price of smelt decreased by 23% to 0,13 EUR/kg, linked with a high increase in volume.

Figure 6. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN LATVIA, JANUARY 2019**



Percentages show change from previous year.  
Source: EUMOFA (updated 14.03.2019).


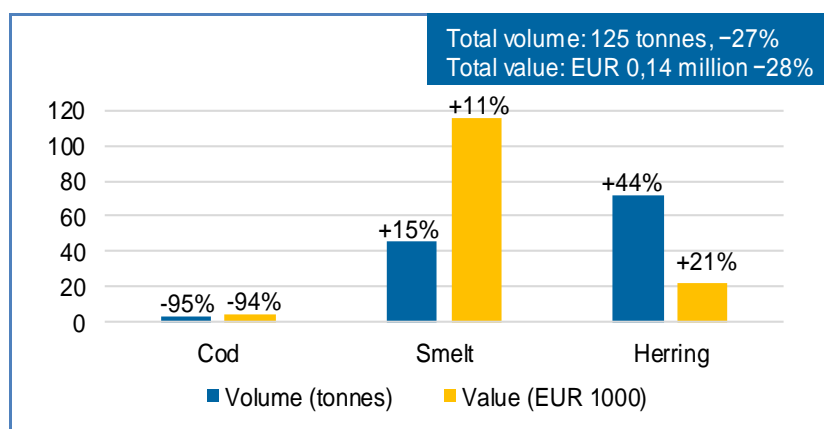
 In **Lithuania** in **January 2019**, first sales decreased from January 2018 due to cod, whose value and volume sharply fell to about EUR 64.000 and 56 tonnes. Other important species which diminished the overall negative trend were smelt and herring, which experienced moderate increases in value and volume. Average price of cod increased to 1,45 EUR/kg in January 2019 compared to January 2018, while those of smelt and herring registered decreases (-3% and -16%, respectively).

Figure 7. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN LITHUANIA, JANUARY 2019**



Percentages show change from previous year.  
Source: EUMOFA (updated 14.03.2019).


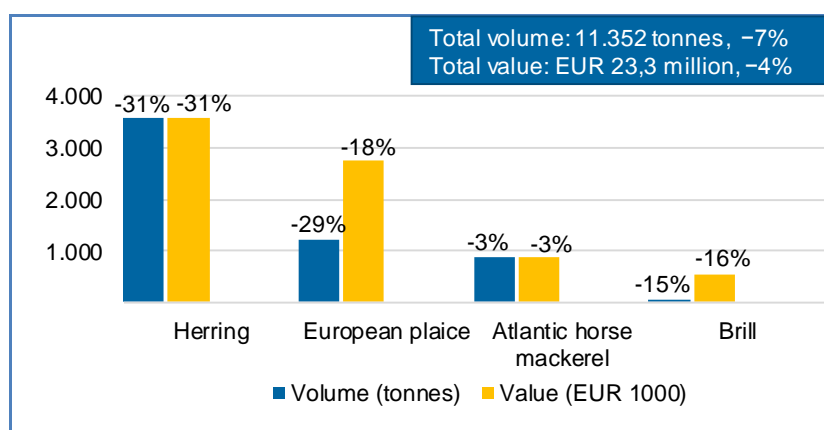
 In the **Netherlands** in **January 2019**, first-sales value and volume fell compared to January 2018. The species most responsible for the decreases include herring, European plaice, brill and Atlantic horse mackerel. Among top valued species, the average price of shrimp *Crangon* spp. fell the most, by 61% to 2,69 EUR/kg, while that of European plaice grew by 16% reaching 2,33 EUR/kg.

Figure 8. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, JANUARY 2019**



Percentages show change from previous year.  
Source: EUMOFA (updated 14.03.2019).


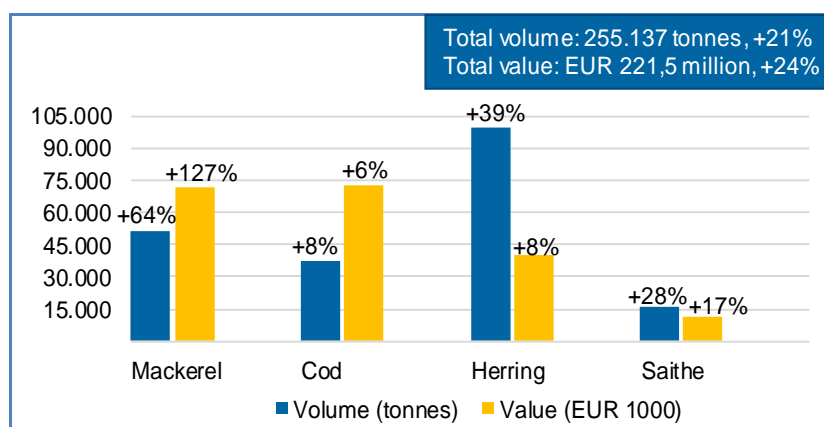
 In **Norway** in **January 2019** compared to January 2018, first-sales value and volume increased by more than 20%, mainly due to mackerel, cod, herring, and saithe. Average price for mackerel increased by 38% reaching 1,41 EUR/kg. It decreased for herring by 22% to 0,40 EUR/kg. The average price for the latter is closely linked to a high increase in supply (+39%), while mackerel price went up, although supply increased (+64%) as well. Other top species did not experience high fluctuations in prices compared to January 2018.

Figure 9. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN NORWAY, JANUARY 2019**



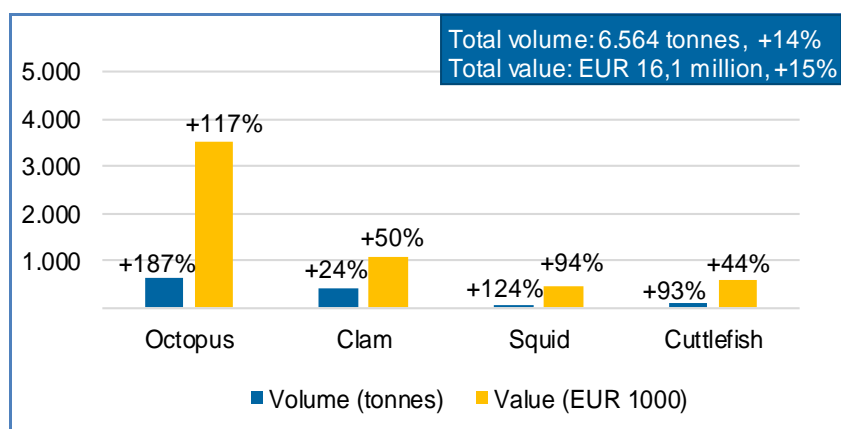
Percentages show change from previous year.  
Volume data is reported in live weight equivalent (lwe). Prices are reported in EUR/kg of live weight.  
Source: EUMOFA (updated 21.03.2019).





In **Portugal** in **January 2019**, first sales increased in value and volume, compared to January 2018. The growth was mostly because of high-valued octopus, which reached EUR 3,5 million for 613 tonnes from EUR 1,6 million for 214 tonnes a year earlier. Other species which contributed to the increases were clam, squid, and cuttlefish. A decrease in anchovy average price (-18% to 1,37 EUR/kg) was attributable to its higher first-sales volume (+24%). Octopus recorded price decrease by 24% to 5,76 EUR/kg.

Figure 10. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN PORTUGAL, JANUARY 2019**

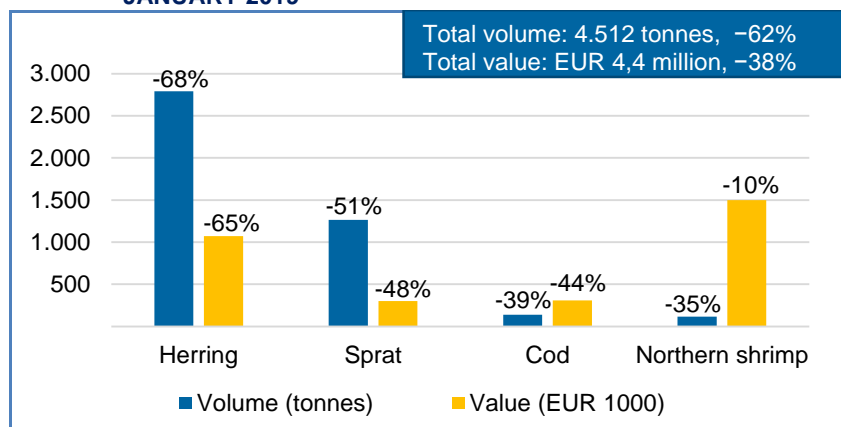


Percentages show change from previous year.  
Source: EUMOFA (updated 14.03.2019).



In **Sweden** in **January 2019**, there were significant decreases in both value and volume from January 2018. This was caused by small pelagics species, including herring and sprat. Average prices of herring and sprat were up by 10% and 6%, respectively. Increases were also observed for Northern shrimp (+38%), haddock (+23%), and saithe (+20%). Cod price recorded a decrease of 9%.

Figure 11. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN SWEDEN, JANUARY 2019**

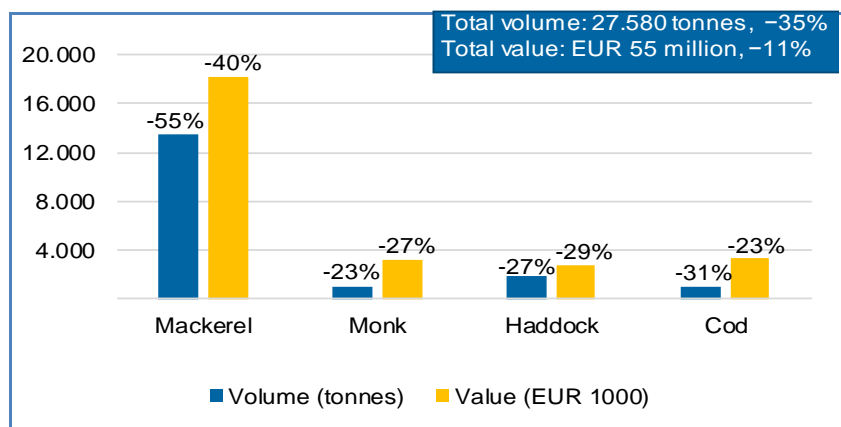


Percentages show change from previous year.  
Source: EUMOFA (updated 14.03.2019).



In the **UK** in **January 2019**, lower first sales of mackerel (down to EUR 12 million and 16.393 tonnes) caused an overall first-sales decrease from January 2018. Other species contributing to this drop were monk, haddock, and cod. Average prices increased for mackerel (+34%) and for cod (+12%), whereas for haddock (-3%) and for monk (-6%) they moved in the opposite direction.

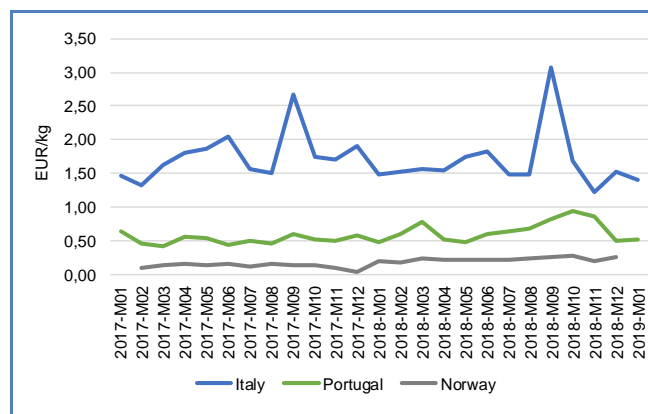
Figure 12. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN THE UK, JANUARY 2019**



Percentages show change from previous year.  
Source: EUMOFA (updated 14.03.2019).

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

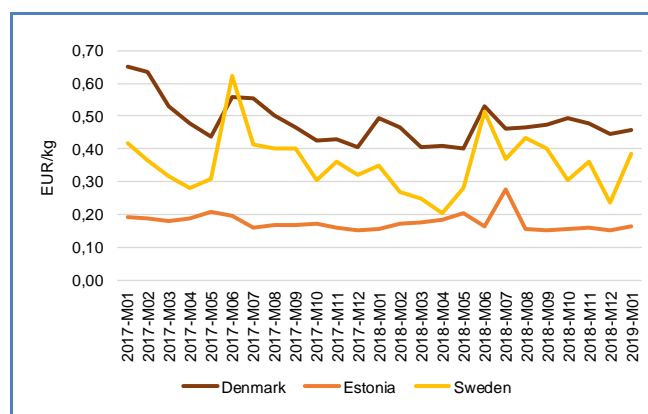
Figure 13. FIRST-SALES PRICES OF BLUE WHITING IN ITALY, PORTUGAL AND NORWAY



Source: EUMOFA (updated 14.03.2019).

First sales of **blue whiting** in **Italy, Portugal, and Norway** accounted for 78% of 2018 volume by reporting countries. The average first-sales price in **January 2019** was 1,39 EUR/kg in Italy (down by 8% from December 2018 and by 6,1% from January 2018), and 0,51 EUR/kg in Portugal (up by 3,9% from the previous month and by 5,9% from the same month in 2017). In Norway, the largest market, the most recent reported price was 0,26 EUR/kg in December 2018, which was up by 32% from the previous month and nearly 650% from a year earlier. The price is lowest in Norway, where this species is destined for industrial uses.

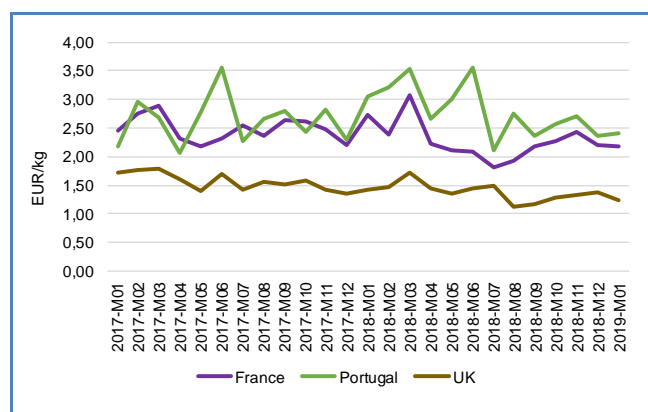
Figure 14. FIRST-SALES PRICES OF HERRING IN DENMARK, ESTONIA AND SWEDEN



Source: EUMOFA (updated 14.03.2019).

First sales of **herring** occur in many countries. The markets in **Denmark, Estonia, and Sweden** account for a combined 25% of reporting country first sales. The average first-sales price in **January 2019** was 0,46 EUR/kg in Denmark (up by 2,9% from December 2018 but down by 7,5% from January 2018), 0,16 EUR/kg in Estonia (up by 7,8% from the previous month and by 3,3% from the same month in 2017), and 0,38 EUR/kg in Sweden (up by 62% from December 2018 and 9,8% from January 2018). Prices are steadiest (and lowest) in Estonia. Prices in Denmark and Sweden are much more volatile but generally track each other.

Figure 15. FIRST-SALES PRICES OF RAY IN FRANCE, PORTUGAL AND THE UK



Source: EUMOFA (updated 14.03.2019).

First sales of **ray** also occur in many countries, but **France, Portugal, and the UK** accounted for 73,8% of reported 2018 volume. The average first-sales price in **January 2019** was 2,18 EUR/kg in France (down slightly by -0,8% from December 2018 and by -19,9% from January 2018), 2,40 EUR/kg in Portugal (up by 1,4% from the previous month but down by 21,1% from the same month in 2017), and 1,24 EUR/kg in the United Kingdom (down by 10,2% from December 2018 and down by 12,6% from January 2018).

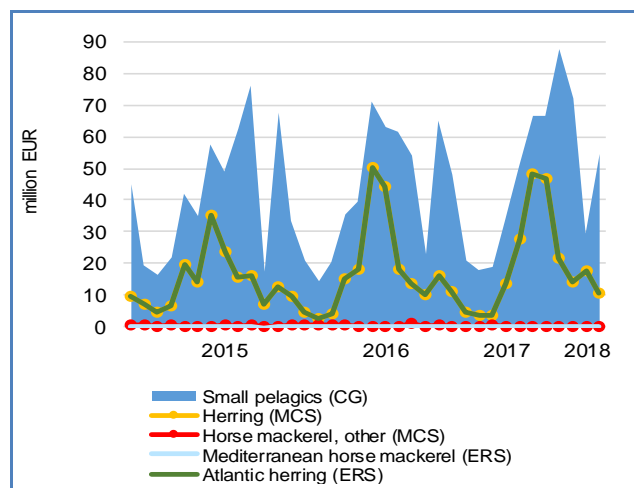
## 1.4. Commodity group of the month: small pelagics

The **small pelagics** commodity group (CG) ranked 1<sup>st</sup> in both value and volume among 11 CGs sold at the first-sales stage in January 2019<sup>2</sup>. First sales reached EUR 54,5 million and 63.058 tonnes, decreasing by 16% in value and 33% in volume from January 2018. In the past 36 months, the highest value of small pelagics was registered in October 2018, at more than EUR 87 million.

Small pelagics commodity group includes seven main commercial species (MCS): anchovy, herring, horse mackerel, mackerel, sardine, sprat, and miscellaneous small pelagics.

At the species (ERS) level, Atlantic mackerel and Atlantic herring are the most important species in total first-sales value (56% and 20%, respectively), while Mediterranean horse mackerel made up only 0,002% of total value of small pelagics species in January 2019<sup>3</sup>.

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



Source: EUMOFA (updated 15.03.2019).

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

## 1.5. Focus on Atlantic herring



Atlantic herring (*Clupea harengus*) is one of 200 herring species in the family Clupeidae found in the open sea throughout the North Atlantic. It congregates in large schools and migrate between spawning and wintering grounds in coastal areas and feeding grounds in open waters. Juvenile herring are heavily preyed upon due to their abundance and small size. Herring can live up to

15 years and reach 40 cm in length and almost 700 g in weight. It reaches sexual maturity at 3 or 4 years, when it measures close to 25 cm<sup>4</sup>.

Atlantic herring is mainly caught by pelagic trawlers and purse seiners. The main stocks fished in EU waters are those in the Baltic, the North Sea, and West of Scotland. Herring catches are seasonal and subject to total allowable catches (TACs) set based on precautionary considerations. Gear restrictions and a minimum size limit of 20 cm are also in place in the EU area<sup>5</sup>. The North Sea Atlantic herring fisheries are managed jointly by the EU and Norway through long-term management plans which are based on a catch quota system which is set annually<sup>6</sup>.

Denmark, Norway, Iceland, and the UK are among the main fishing nations of Atlantic herring. On the market, herring is sold mainly whole, fresh, marinated and smoked.

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

<sup>3</sup> Ranking of the main commercial species in the small pelagic species commodity group can be found in table 1.3 in the Annex.

<sup>4</sup> <https://www.fishbase.in/summary/Clupea-harengus.html>

<sup>5</sup> Regulation (EC) No 850/98

<sup>6</sup> <https://www.consilium.europa.eu/en/press/press-releases/2018/12/19/atlantic-and-north-sea-council-agrees-2019-fishing-quotas/>

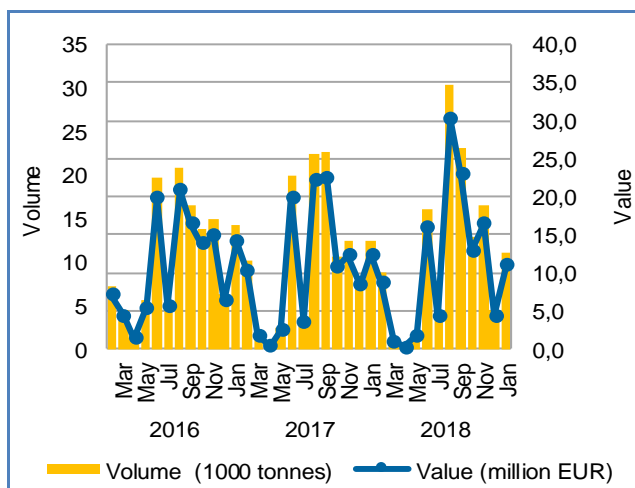


## Selected countries

In **Denmark** in January 2019, first sales of Atlantic herring (EUR 5 million and 11.107 tonnes) decreased by 17% in value and 11% in volume compared to the same period in 2018. Compared to January 2017, value decreased by nearly half in value and by 21% in volume.

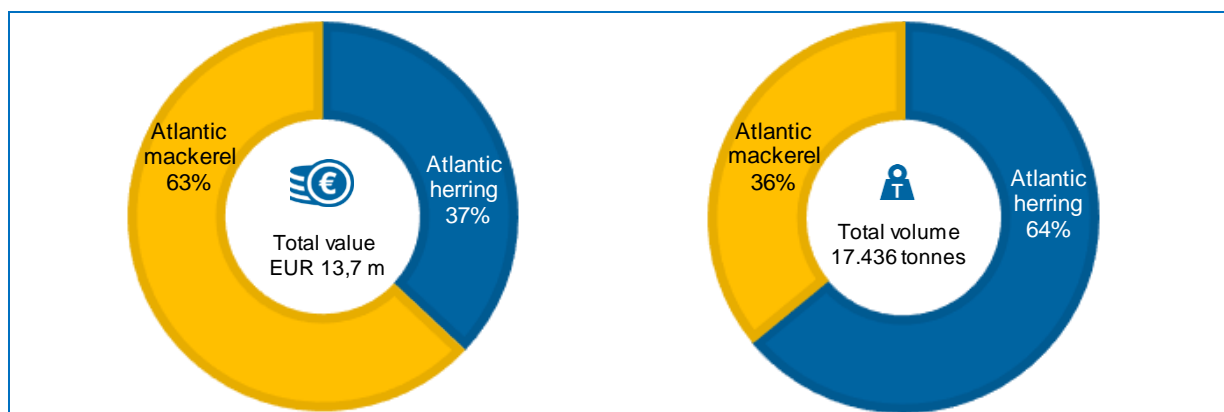
In January 2019, 90% of first sales occurred at the port of Skagen on the coast of the North Sea. Other important Danish ports include Klintholm Havn, Gilleleje, and Hirtshals.

Figure 17. ATLANTIC HERRING: FIRST SALES IN DENMARK



Source: EUMOFA (updated 14.03.2019).

Figure 18. FIRST-SALES COMPARISON OF SMALL PELAGIC SPECIES (ERS) IN DENMARK, VALUE AND VOLUME, JANUARY 2019

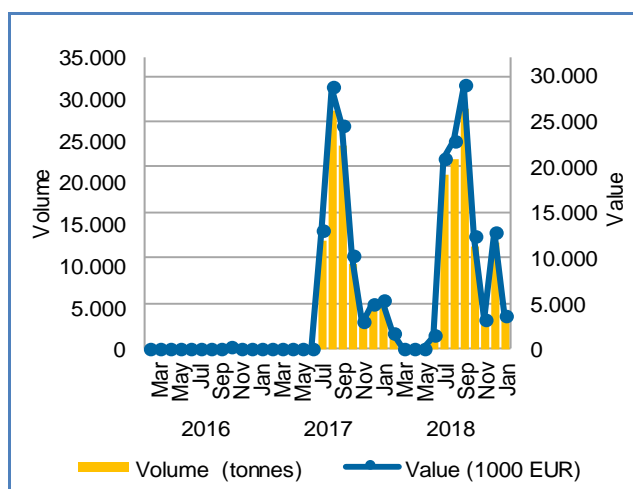


Source: EUMOFA (updated 14.03.2019).

In the **Netherlands** in January 2019, first sales of Atlantic herring (EUR 3,57 million and 3.570 tonnes) decreased by 31% in both value and volume from January 2018. There were no registered fisheries activities in most of 2016, or from March to May in 2017.

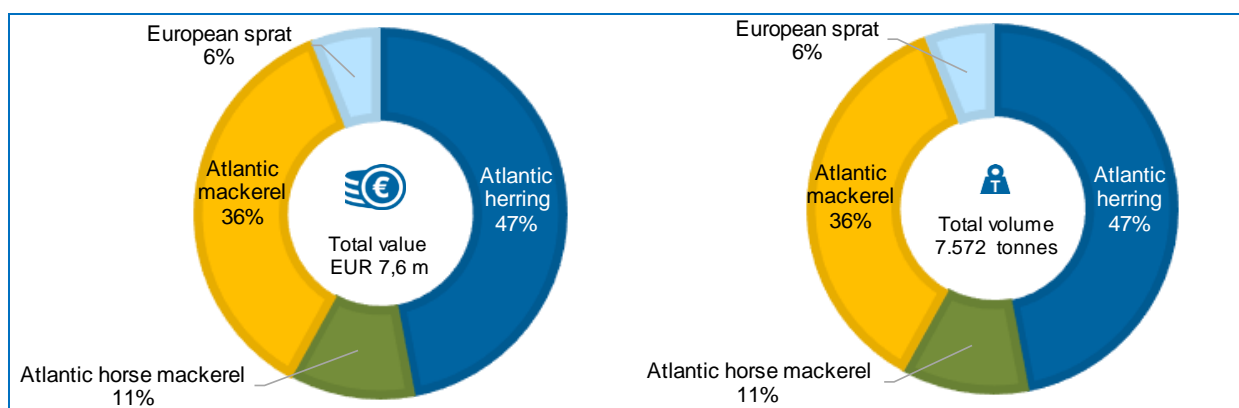
Scheveningen is the Netherlands' port where all first-sales value and volume of Atlantic herring were registered in January 2019.

Figure 19. ATLANTIC HERRING: FIRST SALES IN THE NETHERLANDS



Source: EUMOFA (updated 14.03.2019).

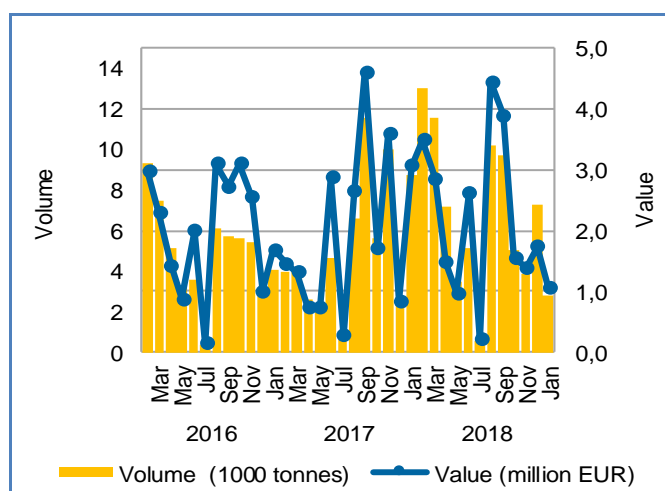
Figure 20. FIRST-SALES COMPARISON OF SMALL PELAGIC SPECIES (ERS) IN THE NETHERLANDS, VALUE AND VOLUME, JANUARY 2019



Source: EUMOFA (updated 14.03.2019).

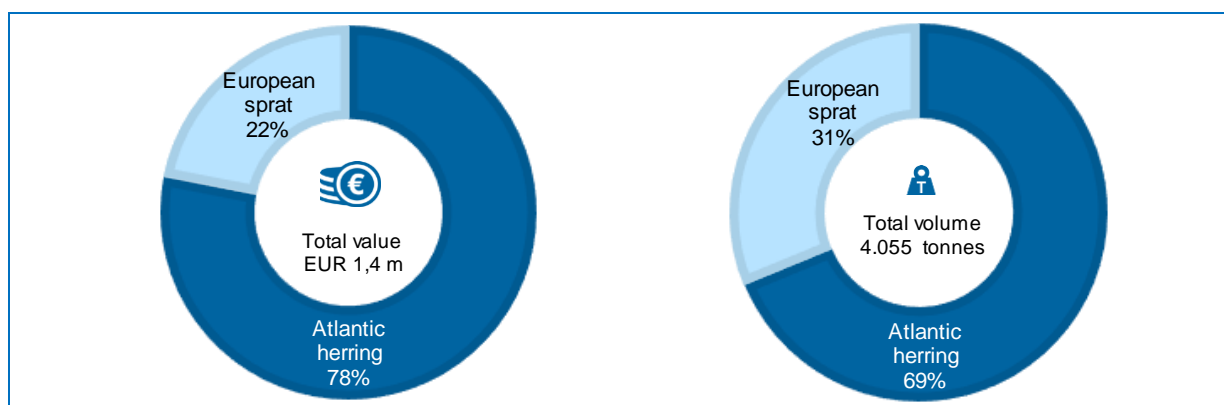
In **Sweden** in January 2019, first-sales value decreased by 65% reaching EUR 1,07 million, whereas volume fell by 68% to 2.790 tonnes. Compared with January 2017, trends were also lower but to a smaller extent (-36% in value and -31% in volume). The Atlantic herring fishery fluctuated during the observed 36-month period, with the lowest fishery in July.

Figure 21. ATLANTIC HERRING: FIRST SALES IN SWEDEN



Source: EUMOFA (updated 14.03.2019).

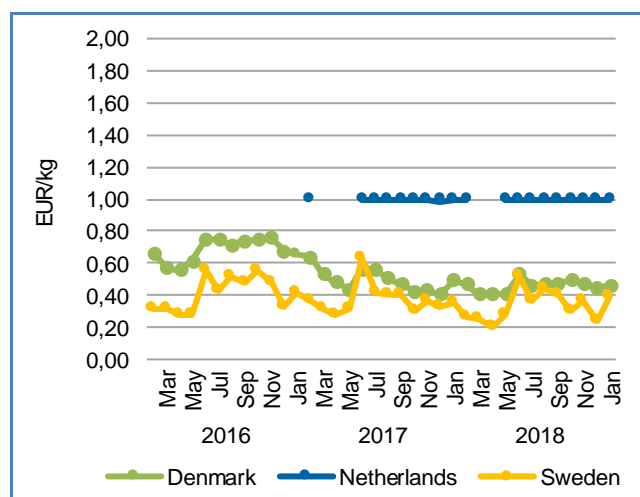
Figure 22. **FIRST-SALES COMPARISON OF SMALL PELAGIC SPECIES (ERS) IN SWEDEN, VALUE AND VOLUME, JANUARY 2019**



Source: EUMOFA (updated 14.03.2019).

## Price trends

Figure 23. **ATLANTIC HERRING: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 14.03.2019).

We have covered **Atlantic herring** in previous *Monthly Highlights*:

**First sales:** Denmark, Poland, the UK (1/2018).

**Topic of the month:** Atlantic herring in the EU (4/2018).

**Extra-EU Import:** from Norway and Iceland (1/2018), from Norway (9/2018).

In the past 36-month period (February 2016–January 2018), the highest average price of Atlantic herring was recorded in the Netherlands (1,00 EUR/kg), 88% higher than in Denmark (0,54 EUR/kg), and 172% more than the price in Sweden (0,37 EUR/kg).

In **Denmark** in January 2019, the average first-sales price of Atlantic herring (0,46 EUR/kg) decreased by 7% from the same period in 2018 and 29% from 2017. Average price of herring peaked in November 2016 reaching 0,76 EUR/kg for 14.872 tonnes landed. In the past 36 months, the price was the lowest in May 2018, at 0,40 EUR/kg for 1.748 tonnes. Supply of Atlantic herring is the highest in August and September.

In the **Netherlands**, average prices of Atlantic herring in almost all months were 1,00 EUR/kg, because prices are internal. Namely, the companies that own the fishing fleet deal with frozen products that are transhipped to and landed by their own freezer vessels. The highest recorded first-sales volume was in September 2018, when 28.868 tonnes were sold. The lowest volume of 606 kg was recorded in May 2018.

**Sweden** had the lowest price-range compared to the rest of the surveyed countries. In January 2019, the average price (0,38 EUR/kg) was up by 10% over January 2018, and down by 8% from the same period in 2017. In the past 36 months, the lowest price (0,21 EUR/kg) was registered in April 2018, when 7.186 tonnes of Atlantic herring were landed and sold. In contrast, June was the month with the highest prices in the previous 36 months, reaching its peak in 2017, when an average one kg of Atlantic herring was sold at EUR 0,62.

## 1.6. Focus on Mediterranean horse mackerel



Mediterranean horse mackerel (*Trachurus mediterraneus*) is a southern species of mackerel in the family Carangidae found in the eastern Atlantic from the Bay of Biscay to Mauritania, including the Mediterranean Sea. It is a benthopelagic, subtropical, marine fish that can reach up to 60 cm in length and can live from 2 to 4 years.

Horse mackerel forms large shoals in bottom waters and midwaters during the day. At night, they disperse and form a layer just off the seabed. The species typically occupies shelf seas, down to 200 m, but individuals have been reported at depths of 500 m.

Juvenile horse mackerel are pelagic feeders that predate on planktonic organisms such as copepods. Larger individuals feed on small fish<sup>7</sup>.

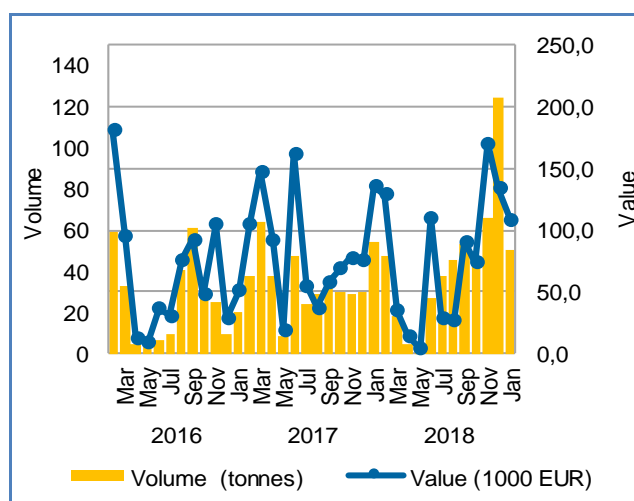
Horse mackerel is fished and landed mainly for human consumption. In the Mediterranean Sea, it is caught mostly by purse-seine and bottom trawl, and fixed nets. This species is also targeted by the recreational fisheries. It is not subject to TAC restrictions in the Mediterranean<sup>8</sup>. In the EU the minimum landing size of horse mackerel spp. is 15 cm<sup>9</sup>.

### Selected countries

In **France** in January 2019, Mediterranean horse mackerel first-sales fell by 20% in value and 7% in volume from the same period in 2018. Compared to 2017, overall first sales were 112% higher in value due to an increase of 148% in volume.

In January 2019, the main ports for first sales were Saint-Jean-de-Luz, Saint-Guénolém, and Saint-Gilles-Croix-de-Vie.

Figure 24. **MEDITERRANEAN HORSE MACKEREL: FIRST SALES IN FRANCE**



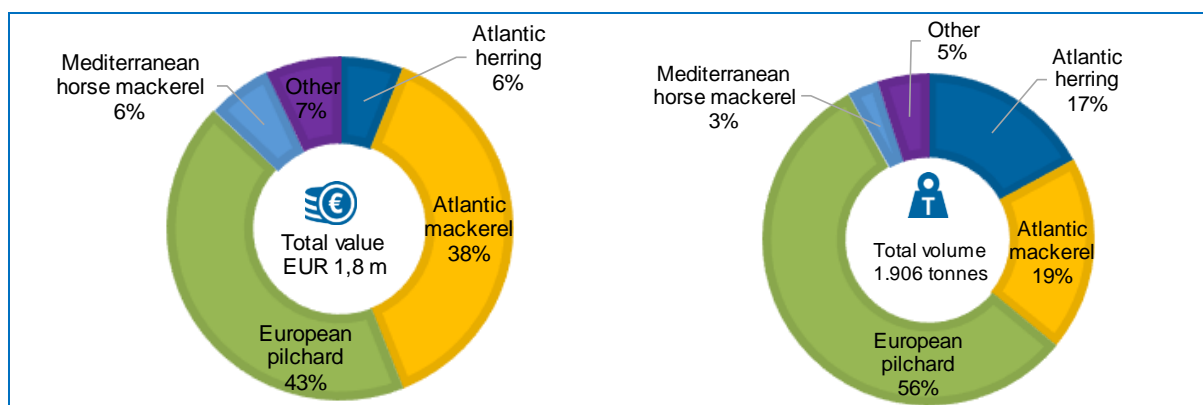
Source: EUMOFA (updated 14.03.2019).

<sup>7</sup> <http://www.ices.dk/sites/pub/Publication%20Reports/Advice/2016/2016/hom-west.pdf>

<sup>8</sup> STECF advice 2013.

<sup>9</sup> COUNCIL REGULATION (EC ) No 2406/96 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:31996R2406&from=EN>

Figure 25. **FIRST-SALES COMPARISON OF SMALL PELAGIC SPECIES (ERS) IN FRANCE, VALUE AND VOLUME, JANUARY 2019**

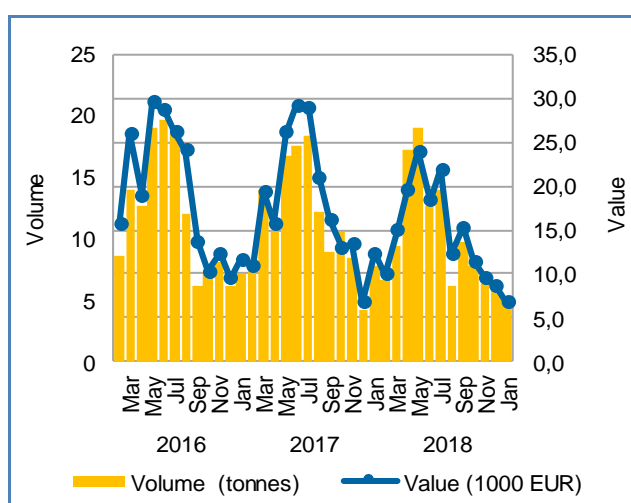


Source: EUMOFA (updated 14.03.2019).

In **Italy** in January 2019, first sales of Mediterranean horse mackerel fell by 46% in value and 33% in volume from the same period in 2018. Compared to the same period in 2017, first-sales value decreased by 42%, whereas volume went down for about a quarter.

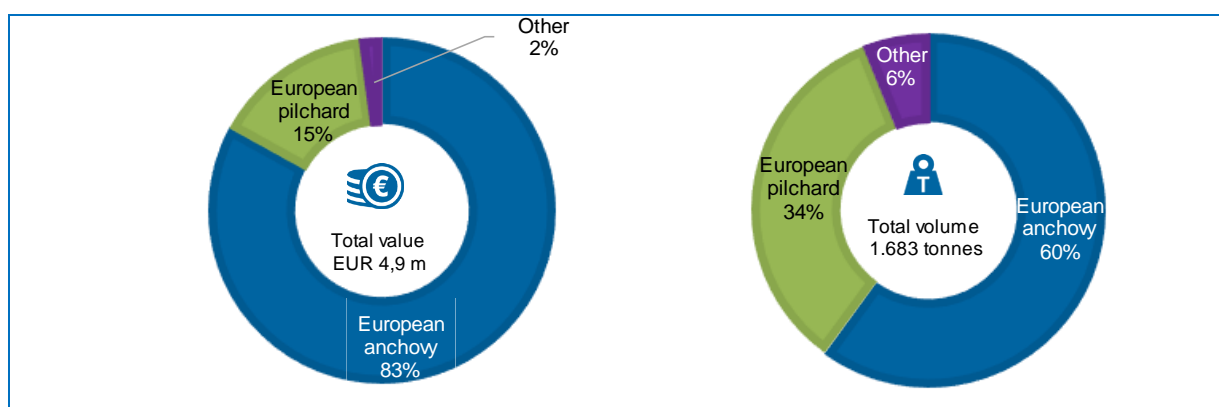
The port of Porto Santo Stefano on the coast of the Tyrrhenian Sea is where 42% of first-sales value was registered in January 2019.

Figure 26. **MEDITERRANEAN HORSE MACKEREL: FIRST SALES IN ITALY**



Source: EUMOFA (updated 14.03.2019).

Figure 27. **FIRST-SALES COMPARISON OF SMALL PELAGIC SPECIES (ERS) IN ITALY, VALUE AND VOLUME, JANUARY 2019**



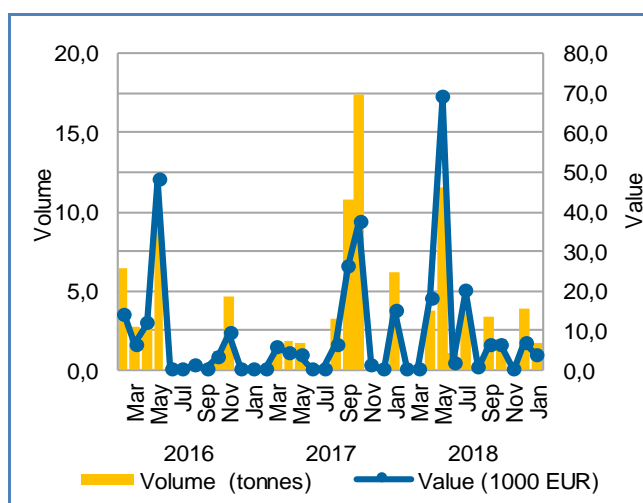
Source: EUMOFA (updated 14.03.2019).



**Portugal** had the lowest catches of Mediterranean horse mackerel among surveyed countries. In January 2019, first sales of Mediterranean horse mackerel decreased in value by 77% (EUR 3.485) and in volume by 73% (1,7 tonnes), compared to January 2018.

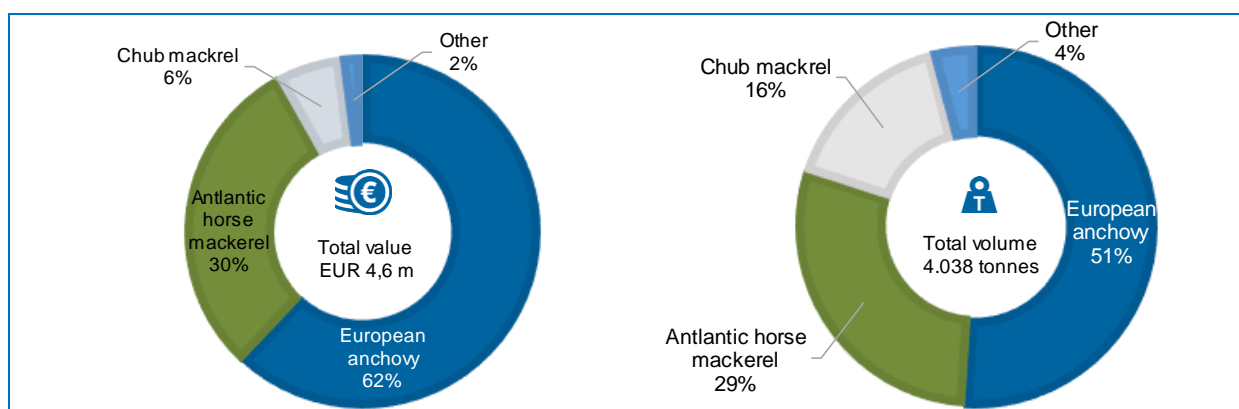
In January 2019, all first sales occurred at the port of Peniche in the Oeste Subregion.

Figure 28. **MEDITERRANEAN HORSE MACKEREL: FIRST SALES IN PORTUGAL**



Source: EUMOFA (updated 14.03.2019).

Figure 29. **FIRST-SALES COMPARISON OF SMALL PELAGIC SPECIES (ERS) IN PORTUGAL, VALUE AND VOLUME, JANUARY 2019**



Source: EUMOFA (updated 14.03.2019).

## Price trends

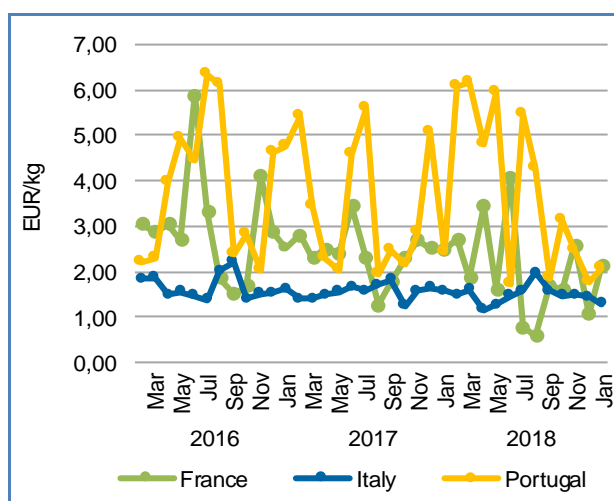
In the past 36 months (February 2016–January 2019), the highest Mediterranean horse mackerel average price was observed in Portugal (3,73 EUR/kg), followed by France (2,44 EUR/kg), and Italy (1,55 EUR/kg). The high price in Portugal is closely linked with registered first-sales volume, which is the smallest among the observed countries.

In **France** in January 2019, the average first-sales price (2,13 EUR/kg) decreased by 14% from the same period in both 2018 and 2017. The highest price was recorded in June 2016, at 5,89 EUR/kg for 6 tonnes, while the lowest price was registered in August 2018 when 46 tonnes were sold at 0,58 EUR/kg. Mediterranean horse mackerel is mostly caught together with other small pelagic species and there is no specific fishery season for this species.

In **Italy**, the average price of Mediterranean horse mackerel during January 2019 was 1,28 EUR/kg – a decrease by 19% from January 2018, and 21% from 2017. The highest average price occurred in September 2016 when 6 tonnes were sold for 2,22 EUR/kg. The lowest average price occurred in April 2018 at 1,15 EUR/kg for 17 tonnes. The peak season for Mediterranean horse mackerel fishery is from May to July.

In **Portugal** in January 2019, the average price of Mediterranean horse mackerel was 2,07 EUR/kg – a decrease by 15% from January 2018. The highest price was recorded in July 2016 when 59 kg were sold at 6,34 EUR/kg. The lowest price in a three-year period occurred in June 2018 at 1,73 EUR/kg for 1.070 kg. In the observed period, first sales fluctuate without clear trends, which is linked with a very limited supply and the fact that Mediterranean horse mackerel is not a main targeted species in the mixed purse-seine fishery. That fishery also targets sardine and Atlantic chub mackerel<sup>10</sup>.

Figure 30. **MEDITERRANEAN HORSE MACKEREL:  
FIRST-SALES PRICE IN SELECTED  
COUNTRIES**



Source: EUMOFA (updated 14.03.2019).

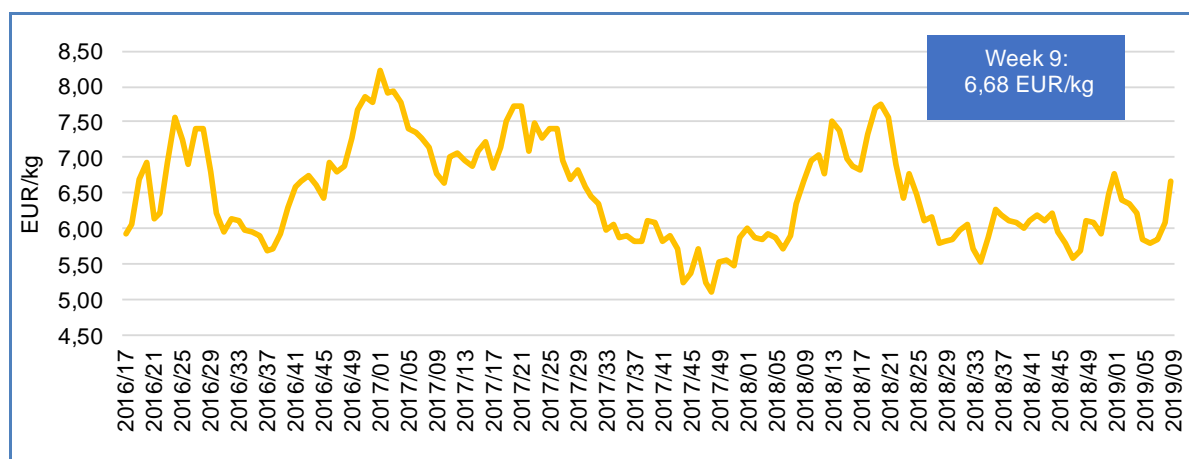
<sup>10</sup> <http://minouw-project.eu/case-studies-new/case-study-2-2-purse-seine-fisheries-in-portugal/>

## 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 herring, Atlantic horse mackerel, and sardines, examined as part of the month's selected commodity group, which this month is small pelagics, along with three other selected species products – yellowfin tuna, haddock and clam, cockles, and ark shells.

The weekly price of fresh whole **Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway** rose to 6,68 EUR/kg in **week 9**, an increase of 9,7% from the previous week. Volume of 10.864 tonnes was down by 8,9%. Compared to a year ago, the price in week 9 was unchanged, and compared to the previous four weeks, during which the average price was 5,90 EUR/kg, the price in week 9 was up by 13,2%. Prices are affected by many factors, from the price of Scottish salmon to prices in markets around the world. Moderate supply on the EU market made spot prices peak in week 10, following the same trend as seen in 2018.

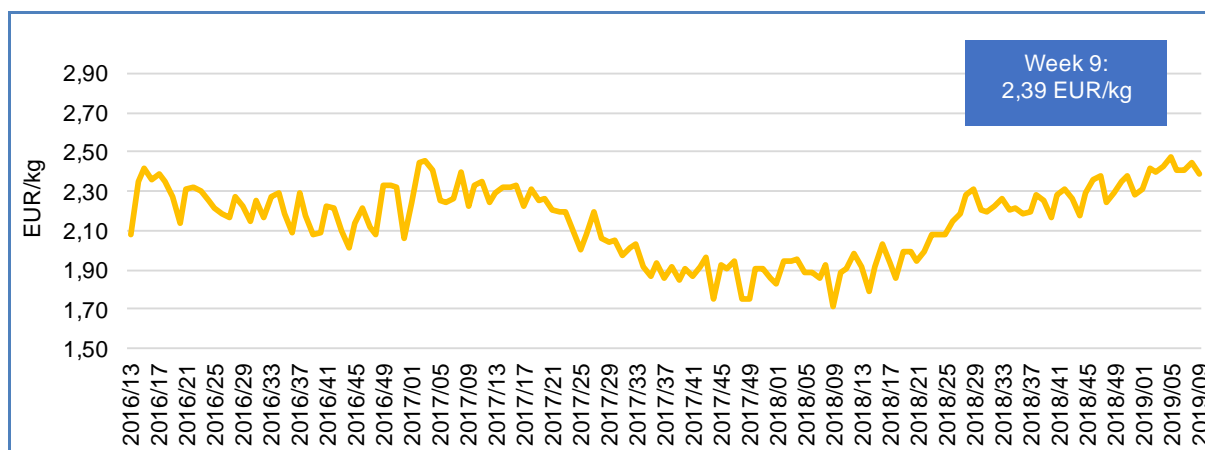
Figure 31. IMPORT PRICE OF ATLANTIC SALMON, FRESH WHOLE FROM NORWAY



Source: European Commission (updated 14.03.2019).

For frozen fillets of **Alaska pollack** (*Theragra chalcogramma*, CN code 03047500) imported from **China**, the price dipped slightly (-2,4%) in week 9 but has generally increased since the beginning of 2018. Compared to week 9 of 2018, the price in week 9 of 2019 was up by 39,8%, and compared to the previous four weeks, during which the average price was 2,43 EUR/kg, the price in week 9 was down by 1,7%. The apparent market strengthening may be due to conditions in the world market for Alaska pollock, which is supplied by most North Pacific countries. Pollack demand is rising in many major markets, as it is less expensive than competing white fish species such as cod.

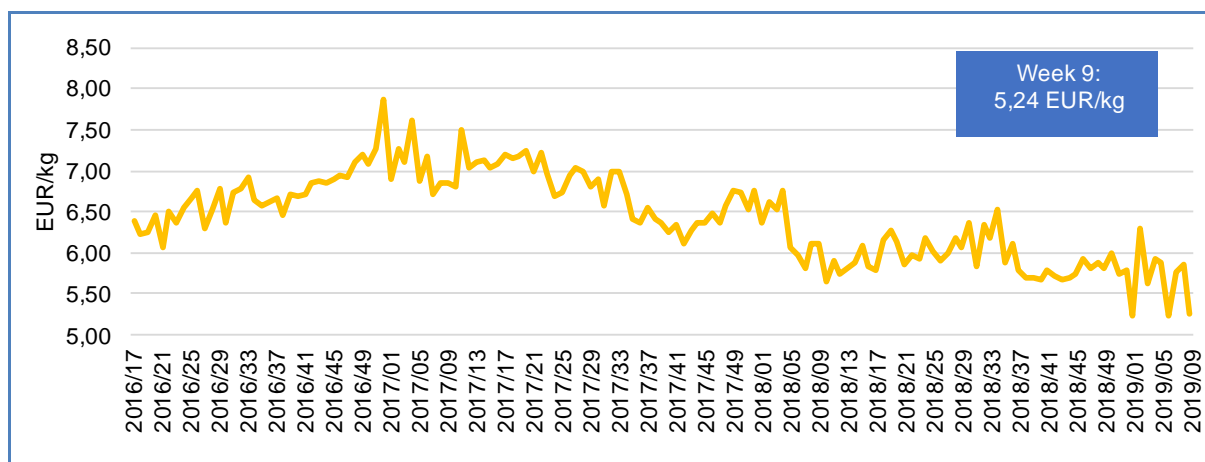
Figure 32. **IMPORT PRICE OF ALASKA POLLOCK, FROZEN FILLETS FROM CHINA**



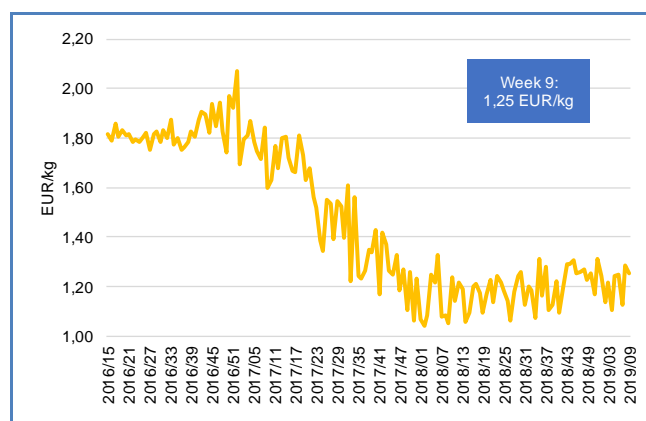
Source: European Commission (updated 14.03.2019).

The price of frozen **tropical shrimp** (genus *Penaeus*, CN code 03061792) from Ecuador fell significantly in **week 9**, down by 10,5% to 5,24 EUR/kg. At the same time, volume rose by 6,3% to 1.250 tonnes. Compared to a year ago, the price in week 9 was down by 14,3%, while in comparison to the previous four weeks, during which the average price was 5,69 EUR/kg, the price in week 9 was down by 7,8%. The price has fallen irregularly from a peak of 7,88 EUR in week 52 of 2016. Ecuadorian production continues to rise, although much of the supply is shipped to Asian markets. EU imports have fallen sharply from a peak of 3.304 tonnes in week 47 of 2018.

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

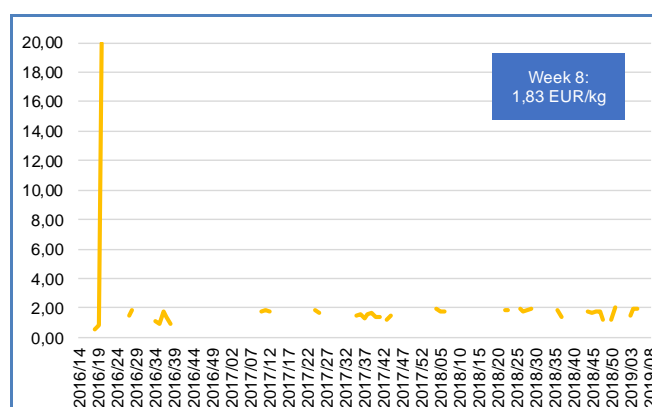


Source: European Commission (updated 14.03.2019).

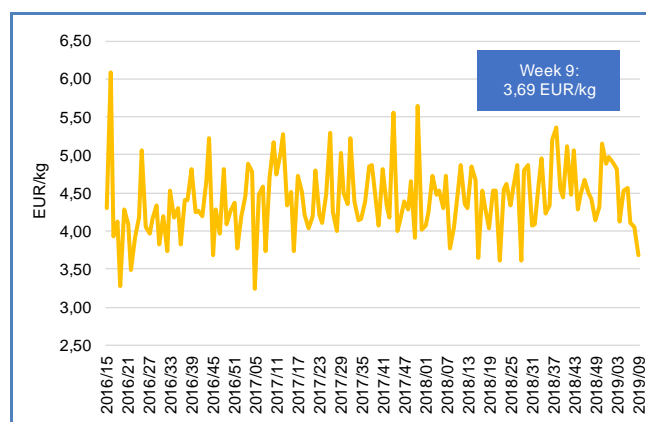
Figure 34. **IMPORT PRICE OF FROZEN HERRING FROM NORWAY**

Source: European Commission (updated 14.03.2019).

Imports of frozen **Atlantic horse mackerel** (*Trachurus trachurus*, CN code 03035510) from **Norway** are sporadic. Most recently, in **week 8** of 2019, the price was 1,83 EUR/kg, with a volume of 44,8 tonnes. The price has averaged 1,76 EUR/kg since the first week of 2018.

Figure 35. **IMPORT PRICE OF FROZEN ATLANTIC HORSE MACKEREL FROM NORWAY**

Source: European Commission (updated 14.03.2019).

Figure 36. **IMPORT PRICE OF SARDINE, WHOLE OR IN PIECES, BUT NOT MINCED, IN OLIVE OIL, PREPARED OR PRESERVED FROM MOROCCO**

Source: European Commission (updated 14.03.2019).

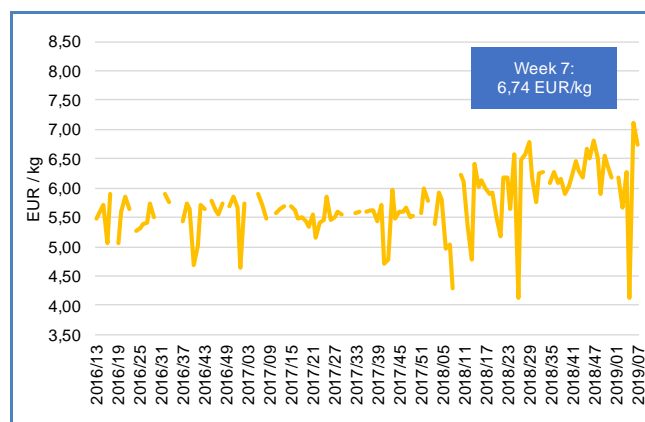
For **frozen herring** (*Clupea harengus*, *Clupea pallasii*, CN code 03049923) imported from Norway, the price was 1,25 EUR/kg in **week 9**, down by 2,5% from the previous week, along with a 20% drop in volume to 413 tonnes. Compared to a year ago, the price in week 9 was up by 19,3%, and compared to the previous four weeks, during which the price averaged 1,23 EUR/kg, the price in week 9 was up by 2,3%. While volatile week to week, the price of this product has followed a fairly stable longer-run trend since week 2 of 2018. Prior to that week, the price fell significantly from a peak of 2,07 EUR/kg in week 52 of 2016. During the observed period volume has continued to be very erratic, showing no clear longer-run trend.

For **sardine**, whole or in pieces, but not minced, in olive oil, prepared or preserved (CN code 16041311), imported from **Morocco**, the price followed a continuous decline since first week of January, falling to 3,69 EUR/kg in **week 9**. Volume grew by 152% at the same time. Compared to the same week a year ago, the price in week 9 was down by 19,2%, and compared to the previous four weeks, during which the price averaged 4,31 EUR/kg, the price in week 9 was down by 14,5%. During the period under review, the price has averaged 4,42 EUR/kg, and has shown little long-run change, reflecting a product with a long shelf life and a predictable market.



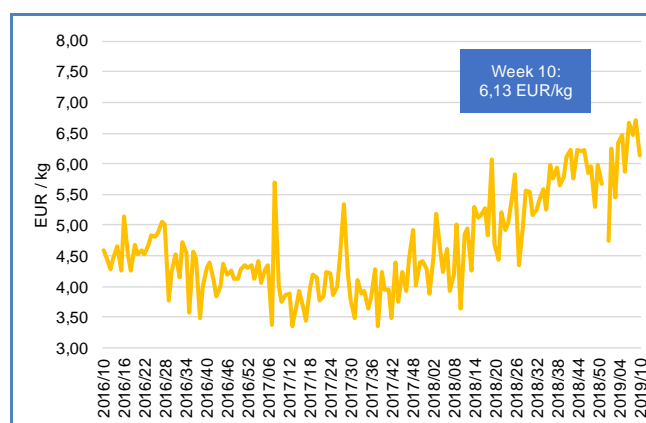
The import price of **yellowfin tuna** (*Thunnus albacares*, CN code 16041431), in vegetable oil, prepared or preserved, from **Seychelles** was 6,74 EUR/kg in **week 7**, down by 5,4% from the previous week, but still much higher than record lows of 4,12 EUR/kg reached in both week 26 of 2018 and week 5 of 2019. Compared to the same week a year ago, the price in week 7 was up by 33,9%, and compared to the previous four weeks, during which the price averaged 5,79 EUR/kg, the price in week 7 was up by 16,3%. Volume rose by 29,2% in week 7, to 242 tonnes, but during the period under review there has been a general decline in volume, while there has been a general increase in price.

Figure 37. **IMPORT PRICE OF YELLOWFIN TUNA IN VEGETABLE OIL, PREPARED OR PRESERVED FROM SEYCHELLES**



Source: European Commission (updated 14.03.2019).

Figure 38. **IMPORT PRICE OF FROZEN HADDOCK FILLETS FROM THE RUSSIAN FEDERATION**

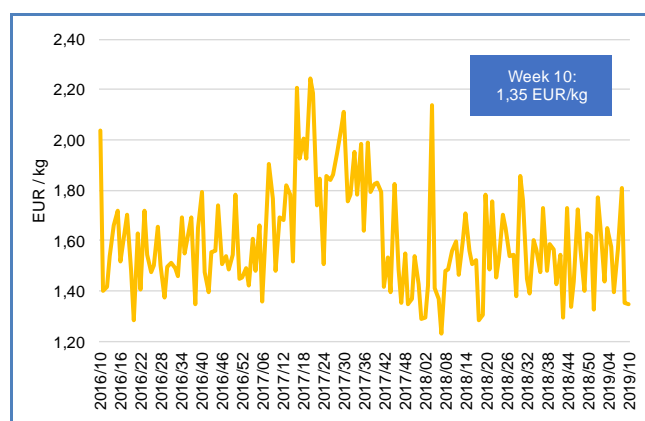


Source: European Commission (updated 14.03.2019).

For **clams, cockles and ark shells**, prepared or preserved (CN code 16055600) imported from **Viet Nam**, the price in **week 10** of 1,35 EUR/kg was unchanged from the previous week but down significantly from the average of 1,61 EUR/kg during the period under review. Compared to week 10 of 2018, the price in week 10 of 2019 was down by 13,5%, and compared to the previous four weeks, during which the price averaged 1,53 EUR/kg, the price in week 10 was down by 11,8%. The price since the beginning of 2018 has shown no long-run trend up or down. Volume is erratic but also has shown no long-run trend.

The price of frozen **haddock** fillets (*Melanogrammus aeglefinus*, CN code 03047200), imported from the **Russian Federation** fell to 6,13 EUR/kg in **week 10**, an 8,6% drop from the previous week. Compared to the same week a year ago, the price in week 10 was up by 69,0%, but compared to the previous four weeks, during which the price averaged 6,43 EUR/kg, the price in week 10 was down by 4,7%. There has been a strong longer-run increase in price since a low point of 3,35 EUR/kg in week 38 of 2017. Volume fell by 41,5% in week 10, to 58,8 tonnes, much lower than a recent high of 643 tonnes in week 39 of 2018.

Figure 39. **IMPORT PRICE OF CLAMS, COCKLES AND ARKSHHELLS, PREPARED OR PRESERVED, FROM VIET NAM**



Source: European Commission (updated 14.03.2019).

## 3 Consumption

### 3.1. HOUSEHOLD CONSUMPTION IN THE EU

In December 2018, consumption of fresh fisheries and aquaculture products increased in Denmark, Hungary, Ireland and Portugal in both volume and value compared with the same month a year ago. The largest increases occurred in Hungary (+11% and +14%, respectively). In Italy, consumption remained unchanged, however, an increase by 2% was recorded in value. In the rest of the surveyed Member States, consumption decreased in both volume and value, except in the UK, where volumes consumed increased slightly (+1%).

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

| Country     | Per capita consumption 2016*<br>(live weight equivalent)<br>kg/capita/year | December 2016 |        | December 2017 |        | November 2018 |        | December 2018 |        | Change from December 2017 to December 2018 |       |
|-------------|--|---------------|--------|---------------|--------|---------------|--------|---------------|--------|--|-------|
|             |  | Volume        | Value  | Volume        | Value  | Volume        | Value  | Volume        | Value  | Volume                                     | Value |
| Denmark     | 24,7   | 652           | 11,60  | 518           | 9,20   | 503           | 7,57   | 562           | 9,36   | 8%   | 2%    |
| France      | 32,9   | 29.245        | 327,59 | 29.169        | 324,89 | 18.123        | 192,51 | 26.369        | 306,03 | 10%  | 6%    |
| Germany     | 13,9   | 6.897         | 85,55  | 7.279         | 91,89  | 5.139         | 64,29  | 6.539         | 86,07  | 10%  | 6%    |
| Hungary     | 5,2  | 2.361         | 10,96  | 1.940         | 10,40  | 376           | 2,44   | 2.163         | 11,90  | 11%  | 14%   |
| Ireland     | 23,0   | 1.367         | 22,03  | 1.215         | 19,50  | 968           | 13,88  | 1.292         | 20,58  | 6%   | 6%    |
| Italy       | 31,1   | 39.394        | 355,85 | 39.187        | 358,85 | 27.857        | 250,83 | 39.174        | 364,46 | 0%   | 2%    |
| Netherlands | 21,0   | 3.293         | 57,11  | 3.215         | 55,88  | 2.480         | 34,69  | 3.170         | 53,74  | 1%   | 4%    |
| Poland      | 14,5   | 15.084        | 63,12  | 14.750        | 70,32  | 4.309         | 25,84  | 13.514        | 67,11  | 8%   | 5%    |
| Portugal    | 57,0   | 5.287         | 37,74  | 4.251         | 32,76  | 4.106         | 28,68  | 4.412         | 36,15  | 4%   | 10%   |
| Spain       | 45,7   | 62.401        | 526,53 | 57.807        | 515,78 | 51.665        | 397,70 | 56.862        | 502,54 | 2%   | 3%    |
| Sweden      | 26,4   | 791           | 11,39  | 866           | 11,88  | 548           | 7,29   | 849           | 11,09  | 2%   | 7%    |
| UK          | 23,7   | 5.155         | 68,15  | 4.191         | 56,93  | 3.566         | 53,40  | 4.252         | 54,54  | 1%   | 4%    |

Source: EUMOFA, based on Europanel (updated 08.03.2019).

\*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)

For the past three years, in all Member States surveyed except Denmark, household consumption of fresh fisheries and aquaculture products in the month of December has been above the annual volume average. This was visible particularly in Hungary and Poland where consumption of fisheries products increases during Christmas, which is traditional in those two countries.

In terms of value, consumption in December has been above the annual average in France, Hungary, Ireland, Italy, the Netherlands and Poland.

## 3.2. Fresh monk

**Habitat:** a predatory demersal species living almost buried in sand, at depths of 50–500 m.

**Catch area:** The coastal areas of the Mediterranean Sea, the Black Sea, eastern North Atlantic Strait of Gibraltar to southwestern Barents Sea<sup>11</sup>.

**Main producing countries in Europe:** France, the UK, Ireland, Denmark, Spain, and Portugal<sup>12</sup>.

**Production method:** caught.

**Main consumers in the EU:** France, Spain, the UK.

**Presentation:** headed and gutted, skinned-off, filleted, tails.

**Preservation:** fresh, frozen.

**Preparation:** baked, grilled, steamed.



### 3.2.1 General overview of household consumption in France and Spain

France and Spain are among the EU countries with the highest per capita consumption of fisheries and aquaculture products. In Spain, per capita consumption was 45,7 kg in 2016, 88% higher than the EU average of 24,3 kg and remained unchanged compared with the previous year. Compared with consumption in Portugal (57,0 kg per capita, the highest in the EU), Spain's consumption was 20% lower.

Per capita consumption in France was at 32,9 kg in 2016, 28% lower than in Spain, but 35% higher than the EU average. Compared with 2015, it showed a 1% decrease. See more on per capita consumption in the EU in table 3.

In both France and Spain, retail prices of fresh monk fluctuated during January 2016–December 2018. Prices in France (16,65 EUR/kg on a monthly average) were higher than those in Spain, while volumes consumed were larger in Spain (1.004 tonnes on a monthly average).

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

**First sales:** Belgium (2/2017, 8/2016, 4/2015, 2/2014), (Denmark (6/2018, 2/2017), France (2/2017, 1/2015, March 2013), Italy (6/2018), Portugal (6/2018), the UK (2/2017, 5/2016, July 2013).

**Extra-EU Import:** Norway (06/2018).

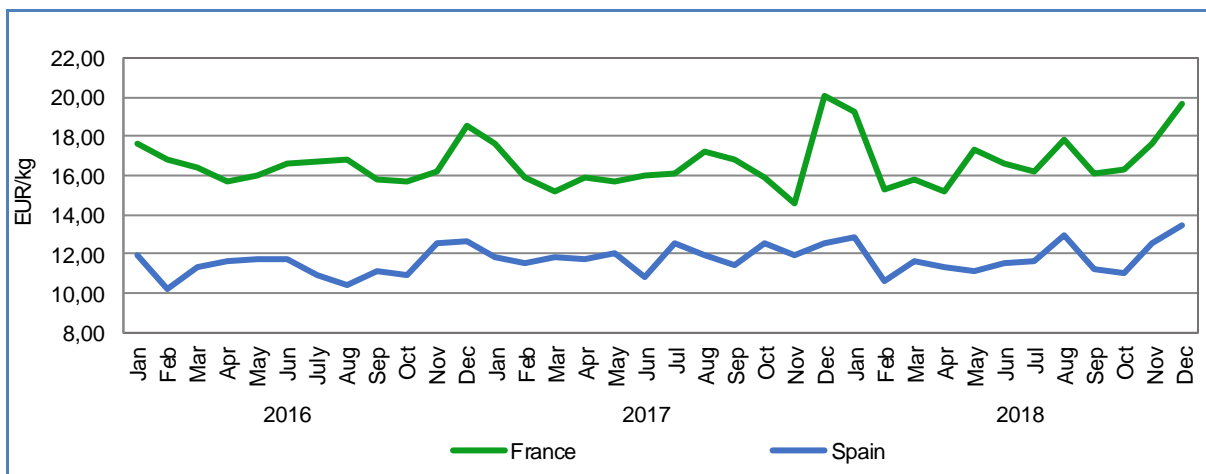
**Topic of the month:** Monk in the EU market (10/2016), Monk in France (March 2013).

**Consumption:** France (1/2017), Spain (1/2017).

<sup>11</sup> <https://www.ices.dk/explore-us/projects/EU-RFP/EU%20Repository/ICES%20FishMap/ICES%20FishMap%20species%20factsheet-haddock.pdf>

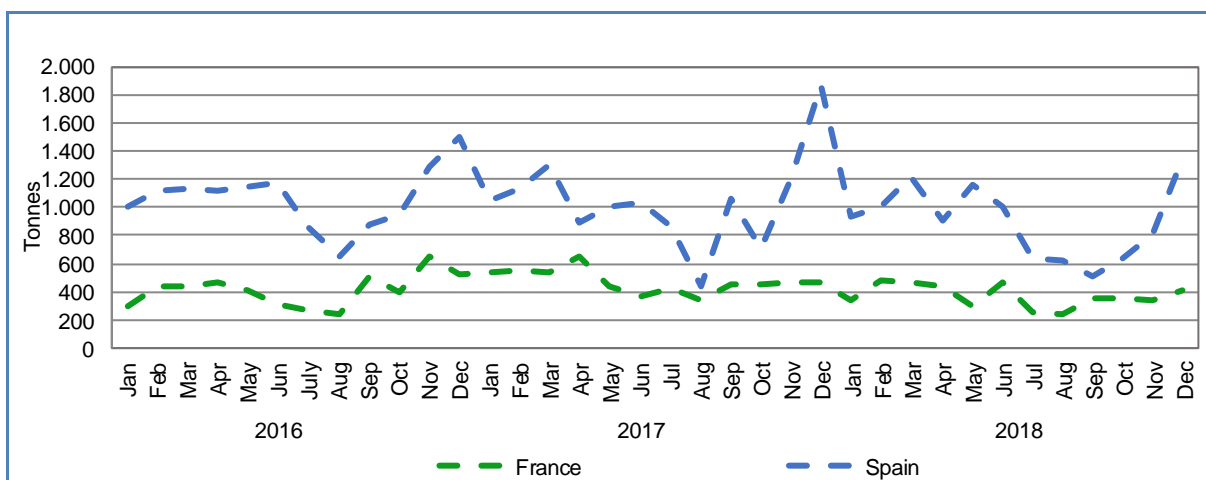
<sup>12</sup> [www.eumofa.eu/documents/20178/22933/Monthly+Highlights+-+N.10-2016.pdf](http://www.eumofa.eu/documents/20178/22933/Monthly+Highlights+-+N.10-2016.pdf)

Figure 40. RETAIL PRICES OF FRESH MONK



Source: EUMOFA, based on Europanel (updated 08.03.2019).

Figure 41. HOUSEHOLD PURCHASES OF FRESH MONK



Source: EUMOFA based on Europanel (updated 08.03.2019).

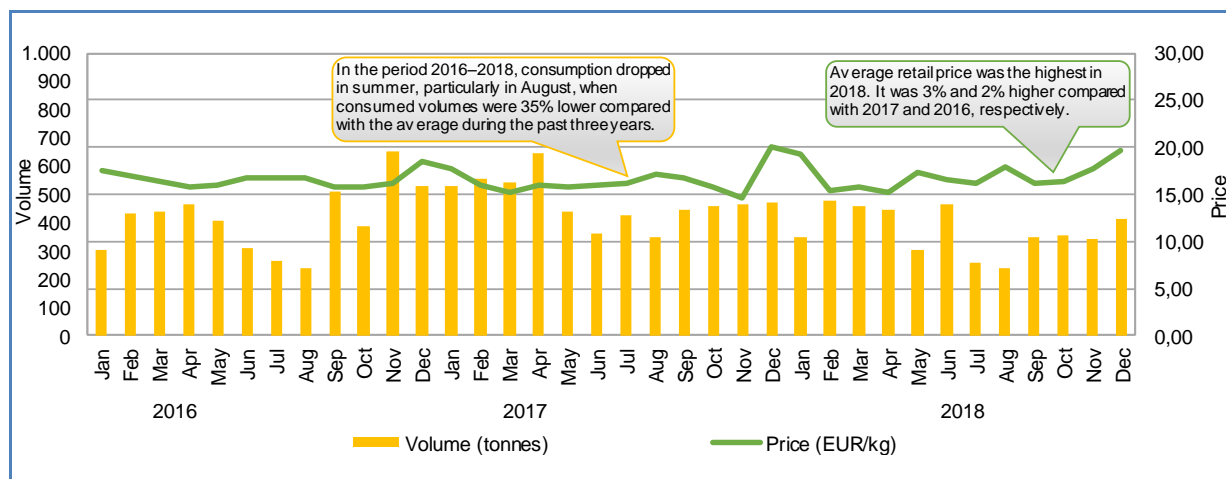
### 3.2.2 Consumption trend in France

**Long-term trend, January 2016–December 2018:** decreasing in volume and increasing in price.

**Yearly average price:** 16,58 EUR/kg (2016), 16,41 EUR/kg (2017), 16,95 EUR/kg (2018).

**Total yearly consumption:** 4.935 tonnes (2016), 5.682 tonnes (2017), 4.462 tonnes (2018).

Figure 42. RETAIL PRICE AND VOLUME SOLD OF FRESH MONK IN FRANCE



Source: EUMOFA, based on Europanel (updated 08.03.2019).

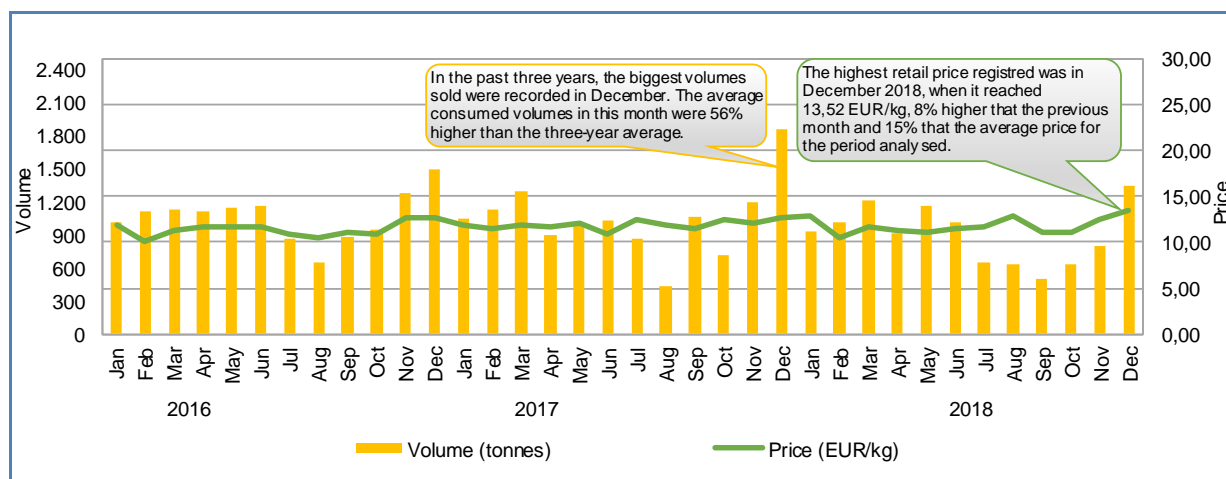
### 3.2.3 Consumption trend in Spain

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

**Yearly average price:** 11,44 EUR/kg (2016), 11,90 EUR/kg (2017), 11,84 EUR/kg (2018).

**Total yearly consumption:** 12.798 tonnes (2016), 12.544 tonnes (2017), 10.799 tonnes (2018).

Figure 43. RETAIL PRICE AND VOLUME SOLD OF FRESH MONK IN SPAIN



Source: EUMOFA, based on Europanel (updated 08.03.2019).



## 4 Case study – Fisheries and aquaculture in Morocco

With two seaboard, on the Mediterranean and on the Atlantic, a 3.500 km long coastline (500 km on the Mediterranean coast and 3.000 on the Atlantic) and a maritime area of 1,2 million square meters, Morocco has strong fisheries assets. Fisheries play a vital role in the Kingdom's economy: they contribute more than 2% to GDP, they offer more than 200.000 direct jobs (108.000 at sea and 94.000 on land), and they represent 45% of agri-food exports and 9% of total exports.

With catches exceeding 1,45 million tonnes in 2016, Morocco ranks first among fishing countries in Africa and 17<sup>th</sup> worldwide<sup>13</sup>.

### 4.1. Production

#### Fisheries

Morocco's fishing fleet is composed of two segments:

- the coastal fleet, which has 2.522 registered vessels (54 GT<sup>14</sup> on average), out of which 1.790 were operational in 2017 (653 trawlers, 691 seiners, 439 longliners and 7 coral-fishing vessels),
- the deep-sea fleet, which has 454 registered vessels (339 GT on average), of which 325 were active in 2017 (237 cephalopod-trawlers, 61 shrimp freezer-trawlers, 25 pelagic trawlers and 2 tuna seiners).

The coastal fleet provided 94,6% of the total fisheries production in volume and 61% in value in 2017.

In 2018, landings of Morocco's coastal fisheries reached 1,3 million tonnes for a first sale value of 7,35 billion Moroccan dirhams (MAD) or EUR 663 million.

Most fishery resources are concentrated in the Central and Southern Atlantic. With landings of 26.000 tonnes in 2018 the Mediterranean contributes little to Morocco's total landings (2% of volume and 8,6% of value).

Table 3. **LANDINGS BY COMMODITY GROUP IN MOROCCO IN 2018 – COASTAL FISHERIES**

| Commodity group | Thousand tonnes | Million MAD | Million EUR |
|-----------------|-----------------|-------------|-------------|
| Pelagic species | 1.189           | 3.033       | 274         |
| Cephalopods     | 38              | 2.665       | 240         |
| White fish      | 64              | 1.328       | 120         |
| Crustaceans     | 5               | 258         | 23          |
| Algae           | 15              | 55          | 5           |
| Shellfish       | 1               | 7           | 1           |
| Total           | 1.311           | 7.346       | 663         |

Source: Office National des Pêches (ONP).

In 2018, the top-five ports are Dakhla (608.000 tonnes), Laâyoune (372.000 tonnes), Agadir (70.000 tonnes), Tan-Tan (60.000 tonnes) and Boujdour (49.000 tonnes). Small pelagics account for 91% of total landings in volume and 41% in value. Morocco is the first producer and exporter of *Sardina pilchardus* worldwide. About 50 canning companies are involved in this activity. With less than 3% of landings in volume, cephalopods represent 36% of the total value.

<sup>13</sup> FAO.

<sup>14</sup> Gross tonnage.

## Aquaculture

Aquaculture remains a sector of minor importance: farmed production amounted to 537 tonnes in 2017 (+124 tonnes compared to 2012). It is currently limited to two species: oyster (farmed in the Dakhla Bay and in the Oualidia lagoon, both on the Atlantic coast) and seabass (farmed in the North, on the Mediterranean coast, close to Tetuan).

Table 4. **AQUACULTURE PRODUCTION IN MOROCCO BY SPECIES (volume in tonnes)**

| Activity     | 2012       | 2013       | 2014       | 2015       | 2016       | 2017       |
|--------------|------------|------------|------------|------------|------------|------------|
| Oyster       | 244        | 278        | 302        | 289        | 376        | 411        |
| Seabass      | 157        | 155        | 167        | 181        | 134        | 113        |
| Algae        | 0          | 0          | 0          | 0          | 0          | 13         |
| Meagre       | 12         | 0          | 0          | 0          | 0          | 0          |
| <b>Total</b> | <b>413</b> | <b>433</b> | <b>468</b> | <b>470</b> | <b>510</b> | <b>537</b> |

Source: Agence Nationale pour le Développement de l'Aquaculture (ANDA).

## Processing

Table 5. **STRUCTURE OF THE FISH PROCESSING INDUSTRY IN MOROCCO IN 2017**

| Activity             | Production<br>(1000<br>tonnes) | Turnover<br>Million MAD | Turnover<br>Million EUR |
|----------------------|--------------------------------|-------------------------|-------------------------|
| Freezing             | 263                            | 6.381                   | 583                     |
| Canning              | 193                            | 6.280                   | 574                     |
| Fishmeal             | 164                            | 1.751                   | 160                     |
| Packaging –<br>fresh | 16                             | 1.641                   | 150                     |
| Semi-<br>preserves   | 21                             | 1.431                   | 131                     |
| Fish oil             | 41                             | 839                     | 77                      |
| Other                | 6                              | 526                     | 48                      |
| <b>Total</b>         | <b>704</b>                     | <b>18.849</b>           | <b>1.722</b>            |

Source: Ministry of Agriculture and Fisheries.

In 2017, the processing industry achieved sales of MAD 18,8 billion (EUR 1,7 billion). It focuses on two major activities - freezing and canning. Freezing units are located in the south (mainly Dakhla), Agadir and Casablanca, and process mostly small pelagics and cephalopods. Canning factories focus on sardine are located in Agadir, Safi and in the south (mainly Laâyoune).

## 4.2. Fisheries partnership agreements

### The EU

On 12 February 2019, the European Parliament agreed to a Sustainable Fisheries Partnership Agreement (SFPA) between the EU and Morocco. This agreement, valid for four years, allocates fishing opportunities to the EU in exchange for an overall financial contribution of EUR 208 million. A substantial part of this contribution will be used to promote the sustainable development of the fisheries economy in Morocco and the Western Sahara<sup>15</sup>.

The fishing opportunities established pursuant to the implementation protocol of the SFPA are allocated among EU Member states as follows:

<sup>15</sup> [https://ec.europa.eu/fisheries/press/european-parliament-votes-favour-eu-morocco-fisheries-partnership\\_en](https://ec.europa.eu/fisheries/press/european-parliament-votes-favour-eu-morocco-fisheries-partnership_en)

- small-scale fishing in the north (pelagic species): 22 licences for seiners (Spain);
- small-scale fishing in the north: 35 licences for bottom longliners (Spain, Portugal);
- small-scale fishing in the south: 10 licences for pole-and-line vessels (Spain);
- demersal fishing: 11 licences for bottom longliners (Spain, Portugal) and 5 licences for trawlers (Spain);
- tuna fishing: 27 licences for pole-and-line vessels (Spain, France);
- industrial fishing for pelagic species:
  - 85.000 tonnes in the first year;
  - 90.000 tonnes in the second year;
  - 100.000 tonnes in the third and fourth year;

Each year the allocation is shared between the following Member states: the Netherlands 30,7%, Lithuania 25,9%, Latvia 14,6%, Germany 8,1%, Poland 5,7%, the UK 5,7%, Ireland 3,6%, France 3,3%, Portugal 1,9%, Spain 0,6%.

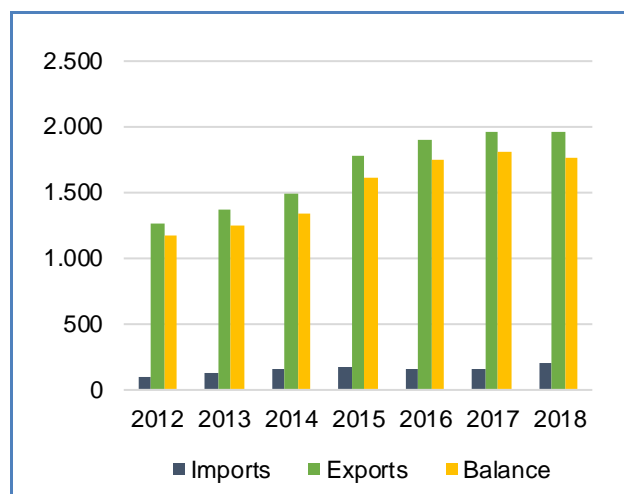
## Russia

On 15 March 2016, Morocco signed a fisheries partnership agreement with Russia for a 4-year period.

According to this agreement, 10 Russian freezer-trawlers are authorized to catch a total quota of 129.500 tonnes<sup>16</sup> of small pelagics in the South Atlantic zone up to Cap Blanc, more than 15 nautical miles off the coast. Russia's yearly financial contribution is set at about EUR 20 million. In addition, Russia pays EUR 7 million annually for scientific research trips, port taxes and wages of Moroccan seamen employed onboard Russian vessels (around 350).

## 4.3. Trade

Figure 44. **MOROCCAN IMPORTS AND EXPORTS OF FISHERIES AND AQUACULTURE PRODUCTS** (value in million EUR)



Source: EUMOFA/IHS Markit.

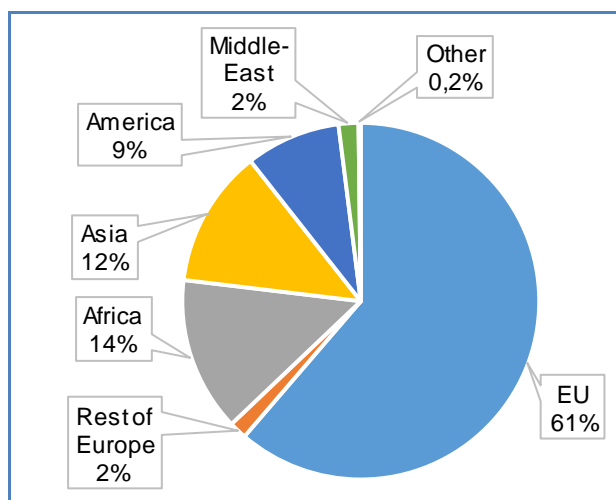
Both Morocco's exports and imports significantly increased in the last years, with a trade surplus rising from EUR 1,17 billion in 2012 to EUR 1,75 billion in 2018. In 2018, small pelagics (37%), cephalopods (35%) and non-food use products (10%) represented 82% of overall exports.

Main products imported are destined for the processing industry (peeling for shrimp, canning for pelagics). The EU provides 70% of Morocco's total imports in value.

<sup>16</sup> Russia's TAC for 2019 is set at 140.000 tonnes, up 8% compared with the previous year.

The EU is Morocco's main commercial partner and absorbs 61% of Morocco's total fishery and aquaculture exports in value in 2018.

Figure 45. **MOROCCAN EXPORTS OF FISHERIES AND AQUACULTURE PRODUCTS BY DESTINATION IN 2018 (in value)**



Source: EUMOFA/IHS Markit.

EU's weight is particularly heavy for fresh fish (81% of Morocco's total exports of fresh fish in 2017 in value) and semi-preserves (80%). Africa imports mostly canned fish from Morocco, while Asia focuses on frozen products.

Table 6. **MOROCCAN EXPORTS OF FISHERIES PRODUCTS BY DESTINATION IN 2017 (value in MAD million)**

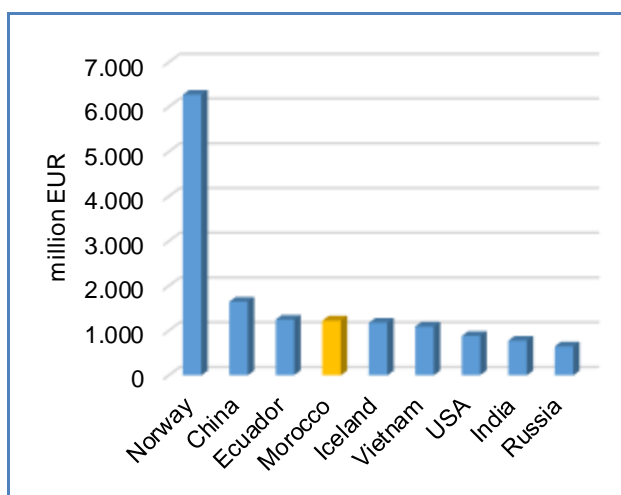
|                | Fresh | Frozen | Canned | Semi-preserved | Fish meal | Fish oil | Algae* | Other | Total  |
|----------------|-------|--------|--------|----------------|-----------|----------|--------|-------|--------|
| EU             | 1.305 | 7.896  | 2.327  | 1.141          | 397       | 266      | 186    | 130   | 13.647 |
| Africa         | -     | 659    | 1.986  | 48             | 28        | 0        | 4      | 1     | 2.726  |
| Asia           | 297   | 1.397  | 141    | 54             | 199       | 34       | 139    | 11    | 2.272  |
| America        | 1     | 605    | 475    | 113            | 12        | 326      | 54     | -     | 1.587  |
| Rest of Europe | 11    | 313    | 121    | 40             | 835       | 81       | 0      | 0     | 1.400  |
| Middle East    | 0     | 7      | 261    | 22             | 17        | -        | -      | -     | 308    |
| Other          | -     | 8      | 27     | 14             | -         | 6        | 1      | 0     | 56     |
| Total          | 1.614 | 10.885 | 5.338  | 1.432          | 1.488     | 713      | 384    | 142   | 21.996 |

\*Including agar-agar.

Source: Office des Changes du Maroc.

## EU imports from Morocco

Figure 46. **EU IMPORTS BY MAIN EXTRA-EU PARTNERS IN JANUARY–NOVEMBER 2018**  
(value in million EUR)



Source: EUMOFA/Eurostat.

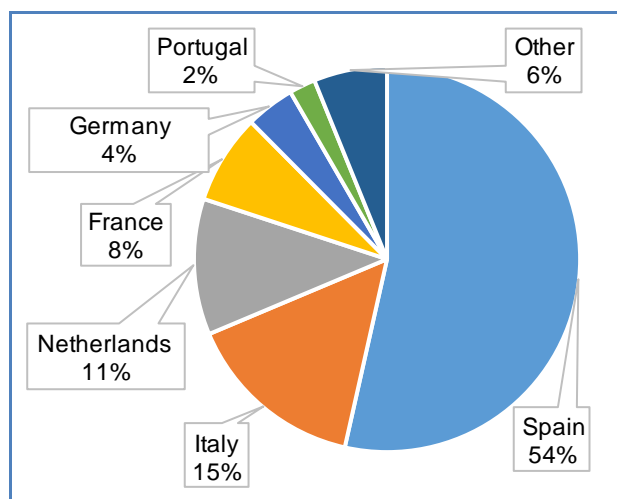
Spain is Morocco's main EU partner, accounting for more than half of total EU imports from Morocco. Italy, the Netherlands, France and Germany are the other major Member states importing from Morocco.

Morocco is EU's fourth-largest supplier. In 2018<sup>17</sup>, the EU imported fishery and aquaculture products from Morocco for a total value of EUR 1,22 billion. Morocco supplies 5% of total extra-EU imports of the EU.

Three commodity groups represent 85% of EU imports from Morocco in value (2018): cephalopods (47%), small pelagics (23%) and crustaceans (15%).

The main commercial species imported are octopus (34%), sardine (13%), shrimps (12%), cuttlefish (8%), anchovy (8%), and squid (4%).

Figure 47. **EU IMPORTS OF FISHERIES PRODUCTS FROM MOROCCO BY MAIN IMPORTING MEMBER STATES IN JANUARY–NOVEMBER 2018**  
(in value)



Source: EUMOFA/Eurostat.

<sup>17</sup>Data for January–November 2018. Data for December 2018 was not available yet during the preparation of this case study.



## EU exports to Morocco

EU exports to Morocco are growing. In 2018<sup>18</sup> they reached EUR 144 million, and the main product exported was shrimp *Crangon* (62% of total exports). Whole shrimps are shipped to Morocco to be peeled in plants around Tangier and then reexported to the EU (to the Netherlands) for packing and further distribution in the EU. Other significant products exported by the EU to Morocco are anchovy and tuna (both exported mostly by Spain).

## 4.4. Consumption

Morocco's yearly average consumption of fishery and aquaculture products rose from 12 kg per capita in the late 2000s to 14 kg per capita in 2017 (source: Ministry of Agriculture) but is still significantly lower than the world average.

The low level of Moroccan consumption can be explained by:

- food consumption habits, especially in the hinterland where the population prefers white and red meat to fish;
- a national fish offer, insufficient and irregular in both quantity and quality;
- high prices, especially for demersal fish.

## 4.5. Morocco and the future

### Halieutis strategy

Since 2009, Morocco has been developing a strategy for the development and the competitiveness of the fisheries sector, called the Halieutis strategy.

Its main objectives<sup>19</sup> were:

- to reach an income of MAD 21,9 billion (EUR 2 billion) in 2020 (baseline 2007: MAD 8,3 million; output 2017: MAD 12,1 billion);
- to develop exports so as to reach USD 3,1 billion in 2020 (baseline 2007: USD 1,2 billion; output 2017: USD 2,3 billion);
- to develop fishing so as to reach catches of 1.660.000 tonnes in 2020 (baseline 2007: 1.035.000 tonnes; output 2017: 1.368.000 tonnes);
- to develop aquaculture to reach a production of 200.000 tonnes in 2020 (baseline 2007: <500 tonnes; output 2017: 537 tonnes);
- to increase the local yearly consumption from 12 kg per capita in 2007 to 16 kg in 2020.

As shown above, some of the interim results achieved at the end of 2017 do not quite reach the objectives, especially for aquaculture, whose development has been undermined by important weaknesses such as low level of involvement of financial actors (bank, insurance), low uptake of cutting-edge farming techniques and difficult access to land.

### Blue economy strategy

Until very recently the development of the fisheries and aquaculture economy had been envisaged on a sectoral basis, without any intersectoral strategy.

This is now changing. The strategy of the fisheries and aquaculture sector is now connected to the framework of the "blue" sector. In its session of December 2018, Morocco's Economic, Social and Environmental Council (ECOSOC) pointed out a need to coordinate with the various sectors of the blue economy and adopted the report "The blue economy: pillar of a new model of development of Morocco". It called for a national sustainable and inclusive blue economy strategy, tailored to regional needs and deployed around traditional economic sectors such as fisheries, tourism and port activities, while developing new sectors with high growth potential.

<sup>18</sup> Data for January–November 2018. Data for December 2018 was not available yet during the preparation of this case study.

<sup>19</sup> Ministry of Agriculture and Fisheries.

This evolution can be linked to the actions taken forward by the European Commission in the Mediterranean in the last years and especially the IMP-MED project (2010-2014) which has provided opportunities to Morocco to elaborate a cross-sectoral vision and engagement.

This new strategy is in-line with the EU approach towards blue economy, which is increasingly considered as an important source of development of which fisheries and aquaculture are a key component.

## 5 Case study – Fisheries and aquaculture of turbot

### 5.1. Introduction

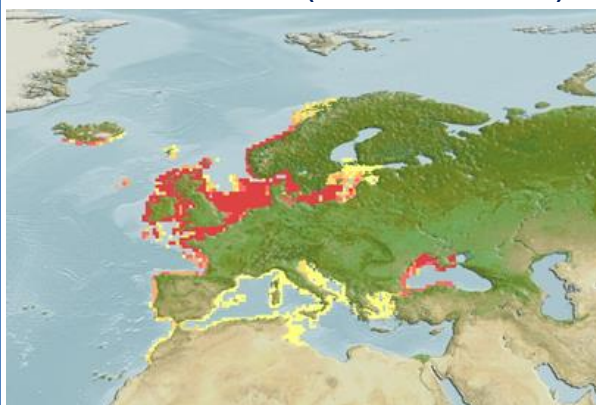
Turbot (*Psetta maxima*) is a flatfish with an asymmetric and almost round body (eyes on the left side)<sup>20</sup>. With respect to habitat and biology, it is a benthic marine species, living on sandy and muddy bottoms, from shallow waters to 100 m. The turbot's spawning (sequenced, every 2-4 days) usually takes place between February and April in the Mediterranean, and between May and July in the Atlantic.

In the wild it is found in the Northeast Atlantic, throughout the Mediterranean and along the European coasts up to the Arctic Circle, as shown in figure 48<sup>21</sup>. It is also found in most of the Baltic Sea, and a subspecies (*Psetta maxima maeotica*) is found in the Black Sea<sup>22</sup>.

Aquaculture production of turbot started in the 1970s in Scotland (UK). It was subsequently introduced to France and Spain. Due to a scarcity of juveniles, the number of installations in Spain was initially limited. However, with technological development of juvenile production, Spain became the main producing country at the time.

Besides commercial investment in improved facilities and the construction of new farms, other decisive factors have assisted in the consolidation and development of the sector. These have included the production of dry feeds and the development of vaccines for the most important diseases affecting turbot.

Figure 48. **DISTRIBUTION RANGE OF WILD TURBOT (COLOURS FROM RED TO YELLOW INDICATE PROBABILITY OF OCCURRENCE (RED = MORE LIKELY))**



Source: Aquamaps.

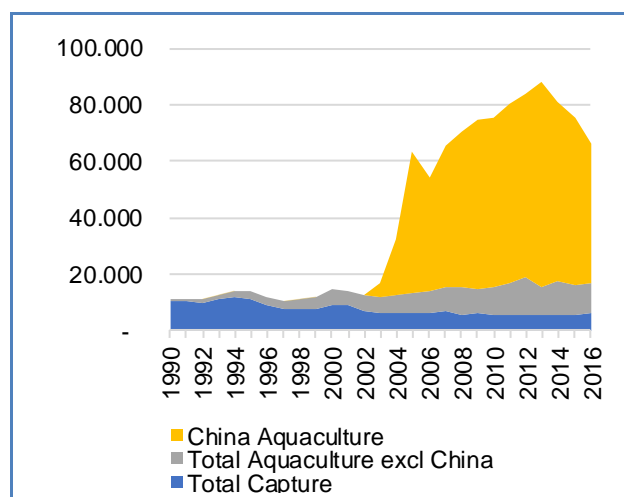
<sup>20</sup> [http://www.fao.org/fishery/culturedspecies/Psetta\\_maxima/en](http://www.fao.org/fishery/culturedspecies/Psetta_maxima/en)

<sup>21</sup> [https://www.aquamaps.org/receive.php?type\\_of\\_map=regular](https://www.aquamaps.org/receive.php?type_of_map=regular)

<sup>22</sup> <https://www.fishbase.se/summary/Scophthalmus-maximus.html>

## 5.2. Global aquaculture production

Figure 49. **GLOBAL CAPTURE AND AQUACULTURE PRODUCTION FROM 1990–2016 (volume in 1000 tonnes)**



Source: FAO.

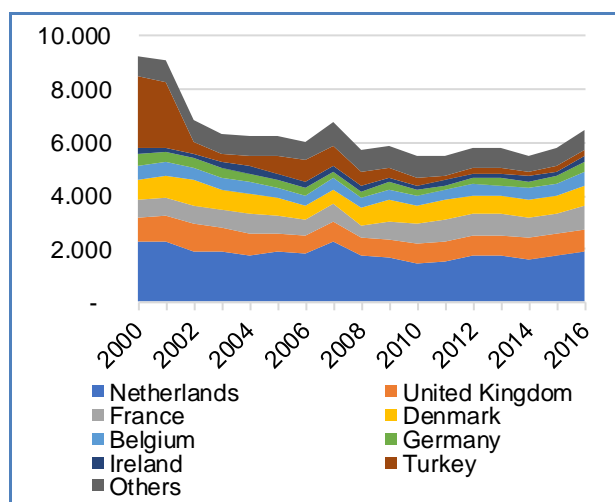
From the early 1990s a reorganization of the sector began, which gave rise to growth both in production and in the number of countries where turbot is farmed. In the EU today turbot is farmed in Spain, Portugal, France, Romania and Croatia. Beyond the EU there is limited production in Norway and Iceland. Since 2000 the growth rate in European production has been on average 6% per year; however, after a peak in 2012 the growth has been flattening out.

Turbot was eventually introduced to other regions such as Chile and China. China started its production in the early 2000s based on European broodstock, and by 2013 production reached 73,000 tonnes. After 2013, production declined to about 50,000 tonnes in 2016. Still, China is by far the world's largest producer of turbot, the products do not compete in the same markets than the European products.

## 5.3. European catches

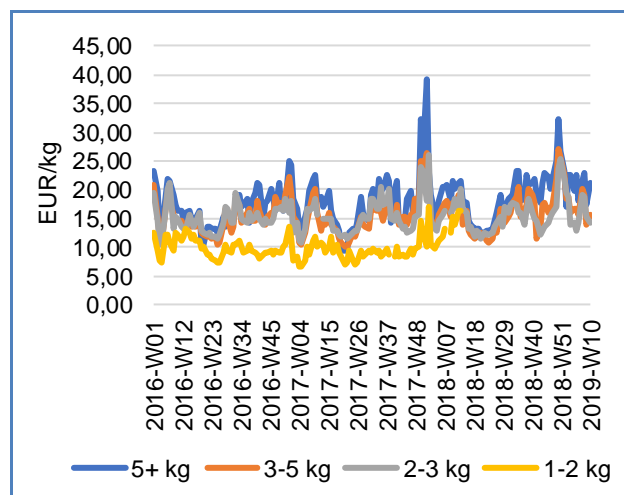
The European turbot captures have since 2000 declined from a total catch of 9,000 tonnes to volumes around 5-6,000 tonnes each year. The share of catch volumes between the countries have remained stable in recent years. The Netherlands has the largest volumes, with a catch of 1,880 tonnes in 2016. The United Kingdom and France caught 873 and 846 tonnes of turbot respectively in 2016.

Figure 50. **EUROPEAN CATCHES OF TURBOT BY COUNTRY (volume in tonnes)**



Source: Eurostat.

Figure 51. **WEEKLY FIRST-SALES PRICE OF TURBOT PER SIZE (prices in EUR/kg)**



Source: EUMOFA.

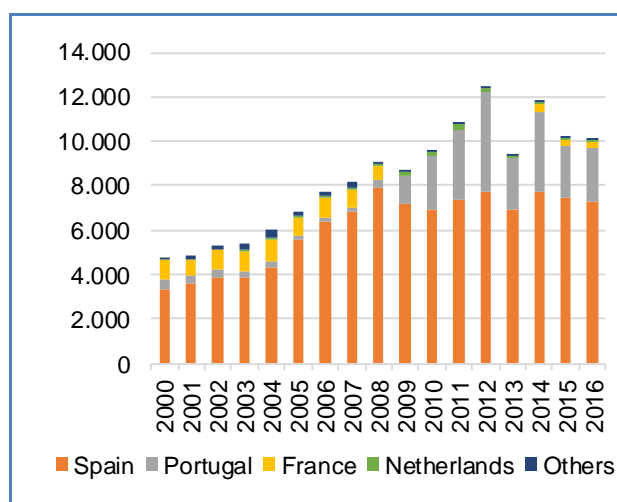
The chart shows the average first sales price of turbot by size for Belgium, Denmark, the Netherlands, Germany, Lithuania and Poland.

There is a slight upward first-sales price trend for turbot sold in the EU from 2016 up to February 2019. The structural price trend through the year shows peaks in prices during the Christmas festive season. The largest sized turbot achieves the highest prices in the market. Over the last two years, the price difference between turbot 5 kg or higher and turbot 3-5 kg has averaged around 2,00 EUR/kg.

## 5.4. Turbot aquaculture in the EU

The major players in the EU turbot aquaculture sector are Spain, Portugal and France. Spain accounted for 72% of the value of EU production in 2016 and the production share is estimated at 76% in 2017<sup>23</sup>. Production has grown steadily since the beginning of the late 1980s and has recently stabilized at around 10.000 tonnes a year. Portugal has increased its production significantly since 2008 and produced 2.388 tonnes in 2016.

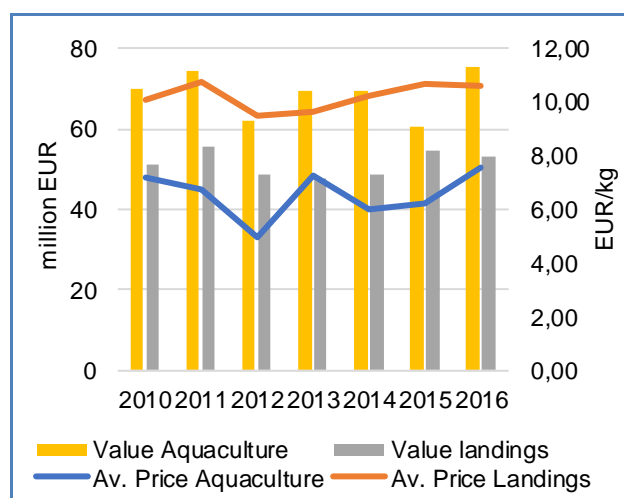
Figure 52. **TURBOT AQUACULTURE PRODUCTION IN THE EU BY MEMBER STATE (volume in tonnes)**



Source: EUMOFA/Eurostat/FAO.

<sup>23</sup> Apromar, La Acuicultura en España 2018.

Figure 53. **PRICE AND TOTAL VALUE OF TURBOT LANDINGS AND AQUACULTURE IN THE EU**



Source: EUMOFA/ Eurostat/FAO.

The turbot from marine fisheries achieves a higher price than farmed turbot. In the figure below, we see that the value from aquaculture is higher due to larger volumes, but that the average price per kg is significantly lower than for turbot landings. In the period 2010-2016, the price for farmed turbot has on average been 6,55 EUR/kg, 56% lower than turbot from marine fisheries (averaging at 10,21 EUR/kg).

It is estimated that production of turbot in Europe rose slightly to 11.000 tonnes in 2017 due to an increase in Spanish production. A slight reduction in production is expected in 2018<sup>24</sup>.

## 5.5. Trade

### Extra-EU Imports

Imports of turbot to the EU are small compared with domestic production in the EU. Over the last four years, imports have been stable at around 200 tonnes per year, this represents 1% of total catch and production in the EU.

Almost all turbot imports come from Norway and Morocco. The main source is Norway with 156 tonnes in 2017 and 139 tonnes in 2018; from Morocco 74 tonnes was imported in 2017 and 62 tonnes in 2018<sup>25</sup>.

The main importing Member States are Sweden, Spain, Germany and Denmark. While Germany, Denmark and Sweden import turbot from Norway, the main country of origin for Spain is Morocco.

Table 7. **EXTRA-EU IMPORTS OF WHOLE TURBOT BY PRESERVATION STATE**  
(volume in tonnes, price in EUR/kg)

| Product             | 2015   |       | 2016   |       | 2017   |       | 2018<br>(Jan–Nov) |       |
|---------------------|--------|-------|--------|-------|--------|-------|-------------------|-------|
|                     | Volume | Price | Volume | Price | Volume | Price | Volume            | Price |
| Fresh whole turbot  | 201    | 9,13  | 231    | 9,69  | 230    | 9,89  | 201               | 10,70 |
| Frozen whole turbot | n/a    | n/a   | n/a    | n/a   | n/a    | n/a   | 5                 | 6,48  |

Source: EUMOFA/Eurostat.

<sup>24</sup> FEAP, APROMAR.

<sup>25</sup> Data for January–November 2018. Data for December 2018 was not available yet during the preparation of this case study.

Table 8. **EXTRA-EU IMPORTS OF FRESH WHOLE TURBOT BY MAIN IMPORTING MEMBER STATES (SWEDEN, DENMARK, GERMANY, SPAIN), (volume in tonnes, prices in EUR/kg)**

| Importing Member State | 2015       |             | 2016       |             | 2017       |             | 2018 (Jan–Nov) |              |
|------------------------|------------|-------------|------------|-------------|------------|-------------|----------------|--------------|
|                        | Volume     | Price       | Volume     | Price       | Volume     | Price       | Volume         | Price        |
| Spain                  | 60         | 11,08       | 72         | 12,31       | 74         | 12,95       | 62             | 14,00        |
| Sweden                 | 76         | 8,81        | 53         | 9,51        | 63         | 9,85        | 75             | 9,67         |
| Germany                | 37         | 7,18        | 75         | 8,03        | 65         | 7,24        | 43             | 8,43         |
| Denmark                | 26         | 8,36        | 31         | 8,00        | 29         | 8,09        | 21             | 9,27         |
| Other                  | 3          | 8,82        | 0          |             | 0,2        | 14,40       | 5              | 6,80         |
| <b>Total</b>           | <b>201</b> | <b>9,13</b> | <b>231</b> | <b>9,69</b> | <b>230</b> | <b>9,89</b> | <b>207</b>     | <b>10,70</b> |

Source: EUMOFA/Eurostat.

## Extra-EU Exports

Of the total catch and production of turbot in the EU of approximately 16.000 tonnes in 2016, only around 400 tonnes were exported to countries outside the EU, of which approximately 75% was fresh product.

The US is the largest export market for fresh whole turbot from the EU. In 2018<sup>26</sup>, EU exports of turbot to the US amounted to 119 tonnes.

Table 9. **EXTRA-EU EXPORTS OF WHOLE TURBOT BY PRESERVATION STATE (volume in tonnes, price in EUR/kg)**

| Product             | 2015   |       | 2016   |       | 2017   |       | 2018 (provisional Jan–Nov) |       |
|---------------------|--------|-------|--------|-------|--------|-------|----------------------------|-------|
|                     | Volume | Price | Volume | Price | Volume | Price | Volume                     | Price |
| Fresh whole turbot  | 328    | 12,25 | 327    | 13,85 | 372    | 12,77 | 312                        | 16,73 |
| Frozen whole turbot | 106    | 9,28  | 69     | 11,12 | 68     | 12,63 | 83                         | 10,39 |

Source: EUMOFA/Eurostat.

Table 10. **EXTRA-EU EXPORTS OF FRESH WHOLE TURBOT BY MAIN DESTINATION (volume in tonnes, price in EUR/kg)**

| Destination country  | 2015       |              | 2016       |              | 2017       |              | 2018 (provisional Jan–Nov) |              |
|----------------------|------------|--------------|------------|--------------|------------|--------------|----------------------------|--------------|
|                      | Volume     | Price        | Volume     | Price        | Volume     | Price        | Volume                     | Price        |
| United States        | 110        | 9,52         | 100        | 10,15        | 106        | 10,45        | 119                        | 10,61        |
| Switzerland          | 75         | 17,16        | 72         | 16,48        | 69         | 15,62        | 58                         | 15,77        |
| Turkey               | 56         | 4,52         | 66         | 3,55         | 84         | 3,51         | 24                         | 3,45         |
| Canada               | 20         | 25,77        | 28         | 25,39        | 23         | 25,67        | 31                         | 25,99        |
| Montenegro           | 14         | 8,00         | 16         | 11,06        | 16         | 9,07         | 13                         | 11,50        |
| United Arab Emirates | 7          | 14,45        | 7          | 12,58        | 10         | 16,38        | 9                          | 15,95        |
| Other                | 46         | 15,11        | 38         | 29,22        | 65         | 21,15        | 57                         | 32,49        |
| <b>Total</b>         | <b>328</b> | <b>12,25</b> | <b>327</b> | <b>13,85</b> | <b>373</b> | <b>12,77</b> | <b>311</b>                 | <b>16,73</b> |

Source: EUMOFA/Eurostat.

<sup>26</sup> Data for January–November 2018. Data for December 2018 was not available yet during the preparation of this case study.



Table 11. **EXTRA-EU EXPORTS OF FROZEN WHOLE TURBOT BY MAIN DESTINATION**  
(volume in tonnes, prices in EUR/kg)

| Destination country  | 2015       |             | 2016      |              | 2017      |              | 2018<br>(provisional Jan–Nov) |              |
|----------------------|------------|-------------|-----------|--------------|-----------|--------------|-------------------------------|--------------|
|                      | Volume     | Price       | Volume    | Price        | Volume    | Price        | Volume                        | Price        |
| United Arab Emirates | 40         | 18,67       | 35        | 15,03        | 28        | 16,33        | 22                            | 14,57        |
| Viet Nam             | 44         | 2,06        | <0,5      | n/a          | 0,4       | 29,38        | 0,5                           | 40,76        |
| Dominican Republic   | 4          | 6,12        | 9         | 5,45         | 7         | 7,32         | 11                            | 7,06         |
| Turkey               | 0,1        | 14,40       | 3         | 6,92         | 5         | 4,70         | 6                             | 4,00         |
| Canada               | 0          |             | 0,7       | 5,03         | 6         | 6,23         | 7                             | 5,00         |
| Mexico               | 3          | 6,70        | 3         | 9,25         | 6         | 10,80        | 3                             | 8,73         |
| Other                | 15         | 6,60        | 18        | 7,73         | 15        | 14,07        | 33                            | 10,79        |
| <b>Total</b>         | <b>106</b> | <b>9,28</b> | <b>68</b> | <b>11,12</b> | <b>68</b> | <b>12,63</b> | <b>83</b>                     | <b>10,39</b> |

Source: EUMOFA/Eurostat.

## Intra-EU Exports

While trade of turbot between EU and third countries is very limited, trade between Member States (especially those of fresh products) is considerably greater. Exports from Spain, Portugal and the Netherlands account for most of the intra-EU trade of turbot. Portuguese production is financed by Spanish investment capital and is almost entirely exported to Spain<sup>27</sup>.

Italy and France mainly import turbot from Spain and the Netherlands. The Netherlands imports mainly from Belgium and Germany. Germany imports mainly from Spain, the Netherlands and France.

Table 12. **INTRA-EU EXPORTS OF WHOLE TURBOT BY PRESERVATION STATE**  
(volume in tonnes, price in EUR/kg)

| Product             | 2015   |       | 2016   |       | 2017   |       | 2018<br>(provisional Jan–Nov) |       |
|---------------------|--------|-------|--------|-------|--------|-------|-------------------------------|-------|
|                     | Volume | Price | Volume | Price | Volume | Price | Volume                        | Price |
| Fresh whole turbot  | 11 850 | 7.70  | 10 030 | 9.60  | 11 297 | 9.11  | 9 641                         | 10.30 |
| Frozen whole turbot | 1 206  | 4.30  | 637    | 5.94  | 542    | 6.54  | 613                           | 6.69  |

Source: EUMOFA/Eurostat.

<sup>27</sup> EUMOFA – “Price structure in the supply chain for turbot”, <http://www.eumofa.eu/market-analysis>

Table 13. **INTRA-EU EXPORTS OF FRESH WHOLE TURBOT, BY MAIN IMPORTING MEMBER STATES**  
(volume in tonnes, price in EUR/kg)

| Importing Member State | 2015          |             | 2016          |             | 2017          |             | 2018<br>(provisional Jan–Nov) |              |
|------------------------|---------------|-------------|---------------|-------------|---------------|-------------|-------------------------------|--------------|
|                        | Volume        | Price       | Volume        | Price       | Volume        | Price       | Volume                        | Price        |
| Spain                  | 3 347         | 6,91        | 2.571         | 9,07        | 3.322         | 8,43        | 3.117                         | 9,65         |
| Italy                  | 3 018         | 7,41        | 2.667         | 8,97        | 3.053         | 8,44        | 2.458                         | 9,62         |
| France                 | 1 951         | 7,28        | 1.477         | 9,63        | 1.680         | 8,68        | 1.071                         | 10,48        |
| Netherlands            | 923           | 8,19        | 923           | 8,42        | 773           | 8,84        | 805                           | 8,80         |
| Germany                | 677           | 11,74       | 793           | 12,11       | 742           | 11,99       | 600                           | 12,80        |
| Portugal               | 213           | 8,07        | 206           | 10,11       | 460           | 9,55        | 534                           | 10,58        |
| Other                  | 1 722         | 8,35        | 1.393         | 11,00       | 1.266         | 11,43       | 1.056                         | 13,22        |
| <b>Total</b>           | <b>11.850</b> | <b>7,70</b> | <b>10.030</b> | <b>9,60</b> | <b>11.296</b> | <b>9,11</b> | <b>9.641</b>                  | <b>10,30</b> |

Source: EUMOFA/Eurostat.

Table 14. **INTRA-EU EXPORTS OF FROZEN WHOLE TURBOT BY MAIN EXPORTING MEMBER STATES**  
(volume in tonnes, prices in EUR/kg)

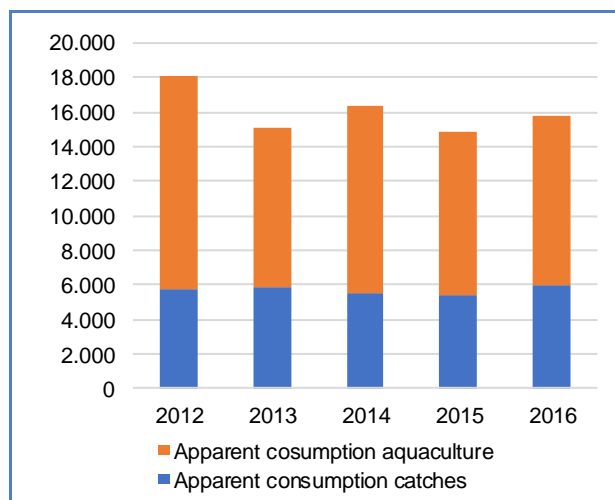
| Exporting Member State | 2015         |             | 2016       |             | 2017       |             | 2018<br>(provisional Jan–Nov) |             |
|------------------------|--------------|-------------|------------|-------------|------------|-------------|-------------------------------|-------------|
|                        | Volume       | Price       | Volume     | Price       | Volume     | Price       | Volume                        | Price       |
| Spain                  | 565          | 2,73        | 279        | 4,24        | 183        | 4,21        | 269                           | 4,85        |
| Italy                  | 239          | 4,72        | 125        | 6,77        | 109        | 6,13        | 108                           | 7,09        |
| Germany                | 58           | 6,80        | 57         | 4,34        | 66         | 7,03        | 80                            | 7,67        |
| France                 | 132          | 4,48        | 69         | 6,56        | 49         | 6,64        | 36                            | 6,46        |
| UK                     | 0            | 6,95        | 0          | -           | 0          | 11,20       | 26                            | 5,98        |
| Portugal               | 55           | 4,03        | 4          | 5,99        | 10         | 5,44        | 21                            | 9,10        |
| Other                  | 51           | 7,28        | 35         | 10,14       | 57         | 7,85        | 40                            | 8,41        |
| <b>Total</b>           | <b>1.101</b> | <b>3,82</b> | <b>568</b> | <b>5,31</b> | <b>474</b> | <b>5,67</b> | <b>580</b>                    | <b>6,10</b> |

Source: EUMOFA/Eurostat.

## 5.6. Consumption

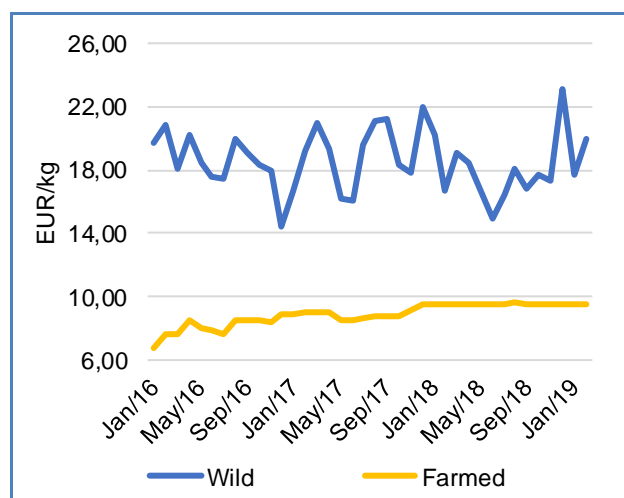
In 2016, 15.750 tonnes of turbot were consumed in the EU, mainly fresh. Consumption is concentrated in Spain, France and Italy, which represent about 75% of the EU market. This makes turbot a niche market compared with other major species<sup>28</sup>. EU apparent consumption of turbot has been relatively stable for both wild and farmed products, although consumption of farmed fish has been slightly more variable than wild fish. However, apparent consumption per capita is estimated to be stable, with approximately 10 grams per capita for captured turbot and double that for farmed turbot (20 grams per capita).

Figure 54. **APPARENT CONSUMPTION OF TURBOT IN THE EU (volume in tonnes)**



Source: EUMOFA – Supply balance.

Figure 55. **WHOLESALE PRICE TREND OF FRESH TURBOT IN SPAIN**



Source: Mercabarna wholesale market.

In Spain, household consumption of turbot rose by 7,7% in terms of volume and by 12% in terms of value from 2016 to 2017. In nominal terms, household consumption is estimated at 4.200 tonnes in 2017, for a value of EUR 44 million<sup>29</sup>. Because Spain is the leading producer of turbot, the country exports a significant share to other Member States, mainly France, Italy and Germany. The market preference is towards fresh product and turbot is sold mainly in whole form, but it can also be sold as fillets to consumers<sup>30</sup>. In France and the Netherlands, turbot is mainly consumed out of home and consumption is supplied to a large extent on fishery-produced fish<sup>31</sup>. In Spain, consumption is mainly based on farmed turbot due to the large national production. A large share of the turbot sales goes to the HoReCa segment and to a lesser extent to fishmongers/small retailers. Like other seafood, an increasing share of turbot is sold by large scale retailers<sup>32</sup>.

Over the last 4-year period, annual volumes of turbot sold at the wholesale markets in Spain have been stable at around 2.000 tonnes. The main wholesale markets where turbot is sold are Mercabarna and Mercamadrid, where farmed turbot constitute close to 80% of the sales in volume terms<sup>33</sup>.

<sup>28</sup> EUMOFA – “Price structure in the supply chain for turbot”, <http://www.eumofa.eu/market-analysis>

<sup>29</sup> Mapama – panel data.

<sup>30</sup> [http://www.fao.org/fishery/culturedspecies/Psetta\\_maxima/en](http://www.fao.org/fishery/culturedspecies/Psetta_maxima/en)

<sup>31</sup> EUMOFA – “Price structure in the supply chain for turbot”, <http://www.eumofa.eu/market-analysis>

<sup>32</sup> Mapama – panel data.

<sup>33</sup> Mercabarna and Mercamadrid wholesale markets.

As with prices at the first-sales level, prices at the wholesale level are higher for wild turbot than farmed turbot. The price difference is mainly due to limited availability of wild turbot. While a slight increasing trend is observed for farmed fresh turbot wholesale price in Spain, a clear trend cannot be observed for wild turbot. In 2017 and 2018, wholesale prices peaked during the Christmas festive season.

## 6 Global highlights

**Fisheries / EU:** The European Parliament and the Council agreed for decentralised and simplified technical rules, giving fishermen a stronger say in deciding on the best measures for sustainable fishing adapted to their specific needs. The new rules include provisions for the protection of the marine ecosystem, marine habitats and for avoiding by-catches of non-commercial and sensitive species. The EU and EC also agreed to introduce a ban on the use of pulse fishing gear from 1 July 2021<sup>34</sup>.



**IUU / Western Africa:** The "Alexandre Baptista" - a joint fisheries surveillance operation to detect illegal, unregulated and unreported (IUU) fishing was conducted. Under the coordination of the Sub-regional Fisheries Commission (SRFC) and with the technical and human support from the European Fisheries Control Agency (EFCA), the joint operation facilitated cooperation among Mauritania, Cabo Verde, and Senegal. During the operation, participating countries shared information from the Vessel Monitoring System (VMS) and other fisheries data to get a full insight of the area of operations in order to recognize the potential illegal activities at sea<sup>35</sup>.

**EU / Morocco / Sustainable fisheries:** The European Parliament has voted in favour of the Sustainable Fisheries Partnership Agreement between the EU and Morocco. The agreement, valid for 4 years, allocates fishing opportunities for around 130 vessels from 10 EU Member States which will be allowed to the fishing grounds of Morocco and Western Sahara to catch tuna, demersal, and small pelagic fish such as sardine, mackerel, and anchovy in exchange for an overall financial contribution of EUR 208 million. A substantial share of the financial contribution will be used to promote the sustainable development of the fisheries economy in Morocco and the Western Sahara<sup>36</sup>.

**EU / Artic / Sustainability:** The Council of the EU voted to join, together with China, Iceland, Japan, and South Korea, the international agreement signed in October 2018 by Canada, Denmark (representing Greenland and the Faroe Islands) - Norway, Russia and the United States, which all share the coast of the Arctic Ocean, to prevent IUU fishing in that area. The agreement aims to prevent IUU fishing in the high seas area of the central Arctic Ocean by implementing preventive conservation and management measures within a long-term strategy to safeguard marine ecosystems and ensure conservation and sustainable use of fish stocks<sup>37</sup>.

**EU / EUMOFA / Events:** In an event-packed May, EUMOFA will participate in the Seafood Expo Global in Brussels from 7 to 9 May 2019; on 16 and 17 May, it will be the turn of the European Maritime Day, hosted this year by the Lisbon Congress Centre. Also, three info sessions on trends, data and analysis related to the European fisheries and aquaculture market will be organised by EUMOFA at the European Commission's stand during the Seafood Expo Global. In addition, EUMOFA will organize two presentations in the meeting room 1123 (in collaboration with The Irish Food Board) and at the stand of Xunta De Galicia – Conselleria do Mar (7-1517, 7-1617), where the "**Organic Salmon in the EU**" and "**Octopus in the EU**" studies will be presented. During the three-day exhibition, it will be possible to meet the EUMOFA team at the European Commission's stand.

**EU / EUMOFA / Blue bioeconomy:** On 17 May, as part of the European Maritime Day, EUMOFA will organise a workshop "Blue bioeconomy: innovations and investments", featuring the main results from a **recent study published by EUMOFA**. The meeting will present the state of blue bioeconomy research to public and private stakeholders and will reflect on the future challenges facing a sector that promises to contribute significantly to the sustainable use of marine ecosystems. Registration is possible [here](#). During the event, at Stand 45, the EUMOFA team will give practical demonstrations on how to access data and key information on the European fisheries and aquaculture market from the EUMOFA website.

<sup>34</sup> [http://europa.eu/rapid/press-release\\_IP-19-1150\\_en.htm](http://europa.eu/rapid/press-release_IP-19-1150_en.htm)

<sup>35</sup> <https://www.efca.europa.eu/en/content/pressroom/joint-fisheries-surveillance-operation-organised-west-africa-framework-eu-project>

<sup>36</sup> [https://ec.europa.eu/fisheries/press/european-parliament-votes-favour-eu-morocco-fisheries-partnership\\_en](https://ec.europa.eu/fisheries/press/european-parliament-votes-favour-eu-morocco-fisheries-partnership_en)

<sup>37</sup> <https://www.consilium.europa.eu/en/press/press-releases/2019/03/04/central-arctic-eu-to-enter-agreement-against-unregulated-fishing/>

## 7 Macroeconomic Context

### 7.1 Marine fuel

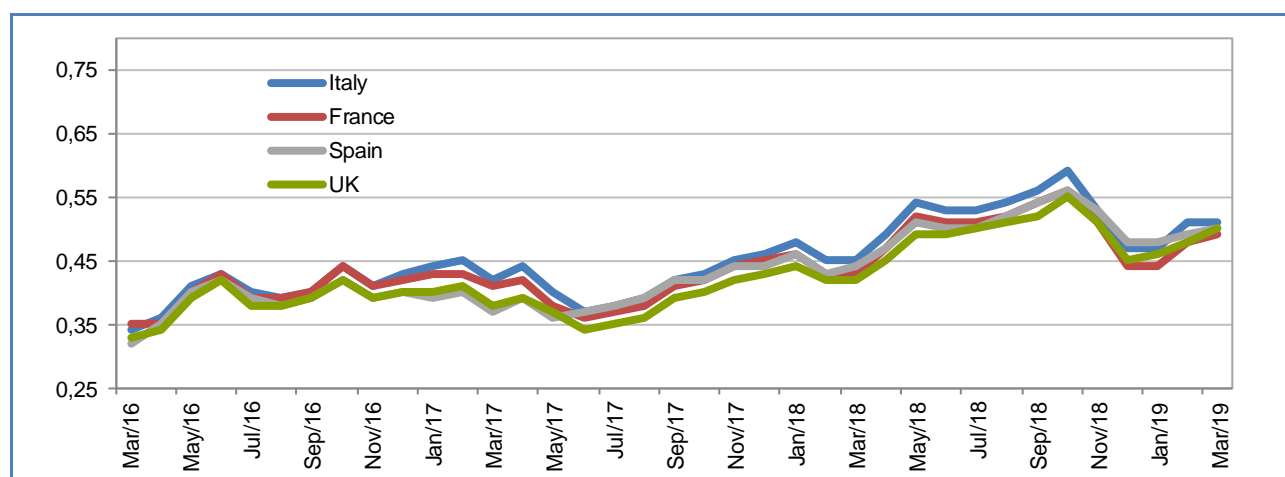
Average prices for marine fuel in **March 2019** ranged between 0,49 and 0,51 EUR/litre, in ports in **France, Italy, Spain, and the UK**. These prices were about 2% higher compared with the previous month and 15% higher compared with the same month a year ago.

Table 15. AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)

| Member State                              | Mar 2019 | Change from Feb 2019 | Change from Mar 2018 |
|---|----------|----------------------|----------------------|
| France<br>(ports of Lorient and Boulogne) | 0,49     | 2%                   | 14%                  |
| Italy<br>(ports of Ancona and Livorno)    | 0,51     | 0%                   | 13%                  |
| Spain<br>(ports of A Coruña and Vigo)     | 0,50     | 2%                   | 14%                  |
| The UK<br>(ports of Grimsby and Aberdeen) | 0,50     | 4%                   | 19%                  |

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 1,6% in February 2019, up from 1,5% in January 2019. A year earlier, it was 1,4%.

**Inflation: lowest rates in February 2019, compared with January 2019.**



**Inflation: highest rates in February 2019, compared with January 2019.**

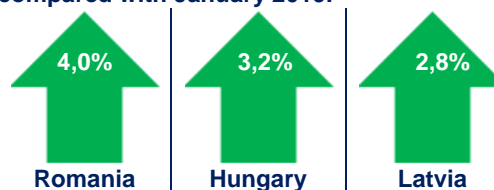


Table 16. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

| HICP                             | Feb 2017 | Feb 2018 | Jan 2019 | Feb 2019 | Change from Jan 2019 |       | Change from Feb 2018 |       |
|----------------------------------|----------|----------|----------|----------|----------------------|-------|----------------------|-------|
| Food and non-alcoholic beverages | 102,63   | 103,86   | 105,46   | 105,98   | ↑                    | 0,49% | ↑                    | 2,04% |
| Fish and seafood                 | 105,96   | 108,01   | 111,05   | 110,44   | ↓                    | 0,55% | ↑                    | 2,25% |

Source: Eurostat.

## 7.3 Exchange rates

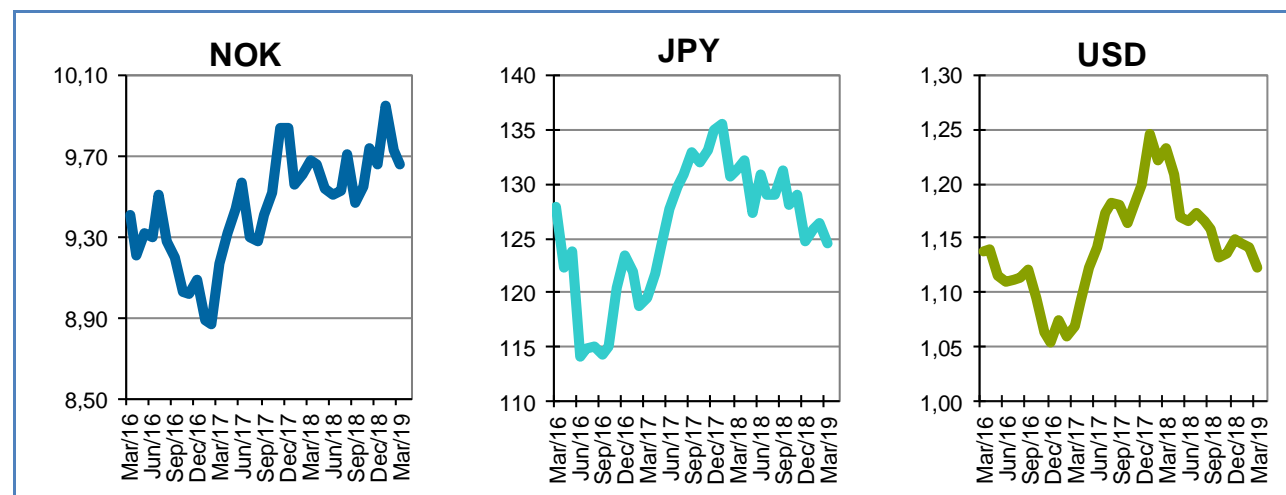
Table 17. EXCHANGE RATES FOR SELECTED CURRENCIES

| Currency | Mar 2017 | Mar 2018 | Feb 2018 | Mar 2019 |
|----------|----------|----------|----------|----------|
| NOK      | 9,1683   | 9,6770   | 9,7268   | 9,6590   |
| JPY      | 119,55   | 131,15   | 126,44   | 124,45   |
| USD      | 1,0691   | 1,2321   | 1,1416   | 1,1235   |

Source: European Central Bank.

In March 2019, the euro depreciated against the Norwegian krone (−0,7%), the Japanese yen and the US dollar (both −1,6%) from February 2019. For the past six months, the euro has fluctuated around 1,14 against the US dollar. Compared with March 2018, the euro has depreciated 5,1% against the Japanese yen, 8,8% against US dollar, and 0,2% against the Norwegian krone.

Figure 57. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.



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

**First sales:** European Commission, European Council, FishBase.in, STECF

**Consumption:** EUROPANEL.

**Case studies:** FAO, European Commission, IHS Markit, Office de Changes du Maroc, Ministry of Agriculture and Fisheries of Morocco, Agence Nationale pour le Développement de l'Aquaculture (ANDA), Office National des Pêches (ONP), Aquamaps, Eurostat, Apromar, FEAP, Mercabarna wholesale market, MAPAMA.

**Global highlights:** European Commission, EFCA, European Council, fis.com, thefishsite.com.

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

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

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

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

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

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

EUMOFA website is publicly available at the following address: [www.eumofa.eu](http://www.eumofa.eu).

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