

In this issue

In April 2019, first-sales value and volume grew in Estonia, Latvia, Lithuania, Poland, Portugal, and the UK over April 2018. In the same period, they declined in Belgium, Denmark, Norway, and Sweden, while in France they remained stable.

In the past 36 months (May 2016–April 2019) the highest average price of blue whiting was recorded in the Netherlands (1,00 EUR/kg), 85% higher than in Portugal (0,54 EUR/kg), and 45% higher than the price in the UK (0,69 EUR/kg). In the same period, the highest average price of saithe was recorded in France (1,52 EUR/kg), 2% higher than in Denmark (1,49 EUR/kg), and 37% over the one in the UK (1,11 EUR/kg).

Extra-EU import price of prepared or preserved mussels in airtight containers from Chile was 2,96 EUR/kg in week 22 (the last week of May), down by 4% from the average during the previous four weeks and up by 1% from a year earlier.

In the first four months of 2019, the average retail price of fresh salmon for household consumption was 23,44 EUR/kg in the Netherlands, 20% higher than in Germany (19,46 EUR/kg).

Ireland is the largest producer of organic farmed salmon in the EU. In 2017, the sector counted around 1.900 full and part-time jobs and 284 production units.

With an average annual production of more than 350.000 tonnes, the EU canned tuna industry supplies 46% of the EU market, with Spain, Italy, Portugal and France as main producers.

The EU and Guinea Bissau have signed a new fisheries protocol that will last for five years, and it maintains fishing opportunities.



Contents



First sales in Europe

Blue whiting (the Netherlands, Portugal, the UK) and saithe (Denmark, France, the UK)



Extra-EU imports

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



Consumption

Fresh salmon in Denmark, Germany, the Netherlands and Sweden



Case studies

The Irish seafood sector
The EU canned tuna industry



Global Highlights



Macroeconomic context

Marine fuel, consumer prices, exchange rates



Find all data, information, and more at:

www.eumofa.eu

Follow us on twitter:

@EU_MARE #EUMOFA

1 First sales in Europe

In **January–April 2019**, 12 EU Member States (MS) and Norway reported first-sales data for 10 commodity groups¹. First-sales data are based on first-sales notes and data collected from auction markets.

1.1 Compared to the same period last year

Increases in value and volume: First sales grew in Estonia, Italy, Latvia, Portugal, and the UK. The increases were particularly high in Estonia due to good catches of herring and in Portugal because of increased first sales of anchovy and octopus.

Decreases in value and volume: First sales declined in Belgium, Lithuania, the Netherlands, Norway, and Sweden. The drop was particularly sharp in Lithuania due to lower first sales of cod and herring, each recording a fall by about 125 tonnes.

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

Country	January–April 2017		January–April 2018		January–April 2019		Change from January–April 2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
BE	5.736	21,02	5.484	22,90	4.609	19,43	-16%	-15%
DK	62.391	95,39	68.510	99,98	71.841	93,65	5%	-6%
EE	21.114	4,55	22.733	4,83	28.761	5,75	27%	19%
FR	64.467	219,59	61.165	212,88	61.527	205,56	1%	-3%
IT	25.280	94,22	22.896	89,98	23.051	97,43	1%	8%
LV	26.495	5,42	19.752	3,67	22.558	3,80	14%	4%
LT	707	0,73	793	0,67	519	0,44	-35%	-35%
NL	35.930	91,30	123.959	174,13	90.023	133,92	-27%	-23%
NO	1.307.538	1.036,60	1.466.849	1.046,17	1.131.214	991,93	-23%	-5%
PL	48.943	15,10	53.303	15,42	53.492	13,38	0%	-13%
PT	21.847	58,32	18.685	51,18	24.102	62,28	29%	22%
SE	28.843	17,98	61.007	26,32	42.661	20,68	-30%	-21%
UK	131.079	222,11	84.672	139,92	89.970	186,44	6%	33%

Source: EUMOFA (updated 17.06.2019).

* 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).

¹ Bivalves and other molluscs and aquatic invertebrates, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, miscellaneous aquatic products, other marine fish, salmonids, small pelagics, tuna and tuna-like species.

1.2 In April 2019

Increases in value and volume: First sales grew in Estonia, Latvia, Lithuania, Poland, Portugal, and the UK. The increases were particularly sharp in the countries along the Baltic Sea, namely: Estonia, Latvia, and Lithuania because of higher supplies of herring.

Decreases in value and volume: First sales declined in Belgium, Denmark, Norway, and Sweden. The latter recorded a plummet due to a sharp decrease in first sales due to lower harvests of small pelagics, including herring (down by 4.000 tonnes) and sprat (down by 2.600 tonnes).

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

Country	April 2017		April 2018		April 2019		Change from April 2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
BE	1.084	4,58	1.219	5,55	1.068	4,99	-12%	-10%
DK	7.962	18,84	13.567	25,76	13.202	23,24	-3%	-10%
EE	3.544	0,90	6.588	1,66	10.557	2,38	60%	43%
FR	15.301	53,30	15.282	51,13	15.330	51,36	0%	0%
IT	6.313	24,66	7.212	26,11	7.049	28,60	-2%	10%
LV	5.603	1,12	4.834	0,94	6.506	1,07	35%	15%
LT	161	0,10	141	0,07	178	0,08	26%	13%
NL	13.462	26,28	39.564	52,50	39.519	48,57	0%	-7%
NO	298.327	209,16	368.809	236,74	245.120	221,56	-34%	-6%
PL	10.532	3,00	10.840	3,24	14.384	3,58	33%	10%
PT	6.620	14,28	4.771	13,33	5.033	14,36	5%	8%
SE	6.423	3,92	11.976	4,34	4.727	3,21	-61%	-26%
UK	23.179	44,10	15.081	35,01	17.033	37,75	13%	8%

Source: EUMOFA (updated 17.06.2019.); volume data is reported in net weight.

*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).

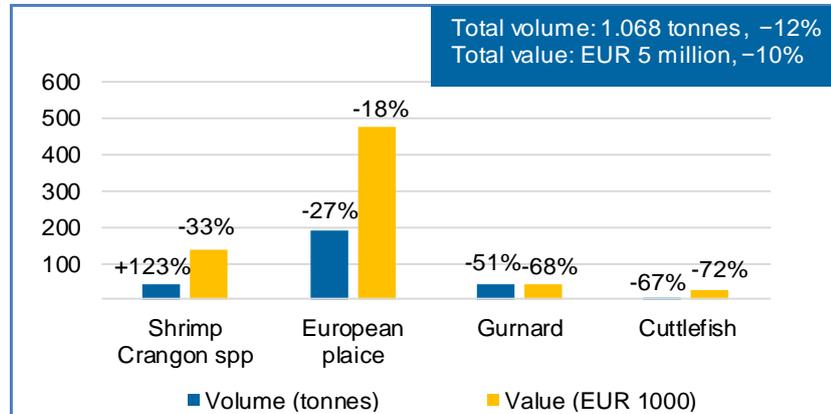
The most recent weekly first-sales data (up to week 29-2019) available in EUMOFA can be accessed [here](#).

The most recent monthly first-sales data for May 2019 available in EUMOFA can be accessed [here](#).

1.3 First sales in selected countries

 In **Belgium** in **January–April 2019**, overall first-sales value and volume fell by 15% and 16%, respectively, from the same period in 2018. The main species contributing to this decline were cuttlefish, scallop, gurnard and European plaice. In **April 2019**, both total value and volume were lower compared with April 2018. European plaice, shrimp *Crangon* spp., gurnard and cuttlefish were the key species responsible for these trends. Among the top valued species, the average price of gurnard fell by 35% to 1,03 EUR/kg.

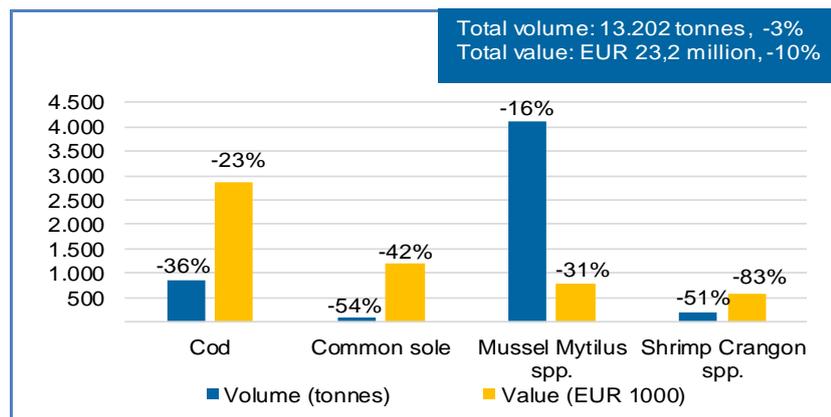
Figure 1. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN BELGIUM, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

 In **Denmark** in **January–April 2019**, first-sales value fell slightly by 6%, while volume grew by 5% compared to the same period in 2018. In **April 2019**, first sales decreased in both value and volume compared to April 2018. The value decline was mostly attributable to shrimp *Crangon* spp., whereas volume fell due to lower supplies of mussel *Mytilus* spp. and cod. The average price decreased significantly for shrimp *Crangon* spp. (-65%).

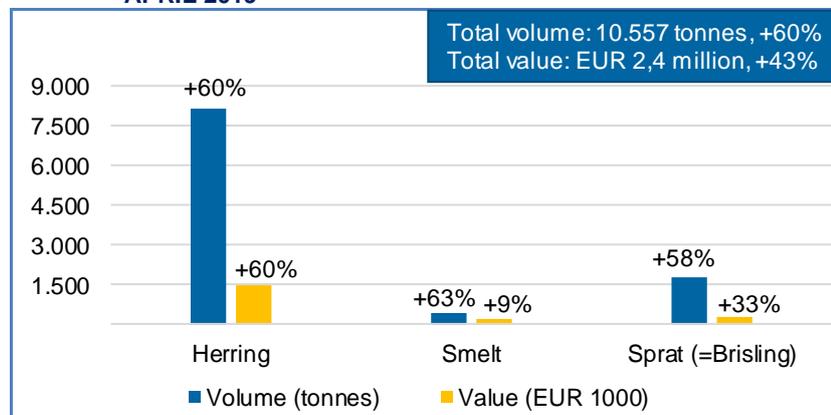
Figure 2. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN DENMARK, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

 In **Estonia** in **January–April 2019**, herring was the main factor behind the growth in overall first-sales value (+19%) and volume (+27%), compared to the same period in 2018. The same species, together with sprat, were responsible for even higher increases of overall first sales in **April 2019** compared to April 2018. The average price of herring remained stable, while that of sprat decreased by 16% to 0,15 EUR/kg as direct result of higher first sales.

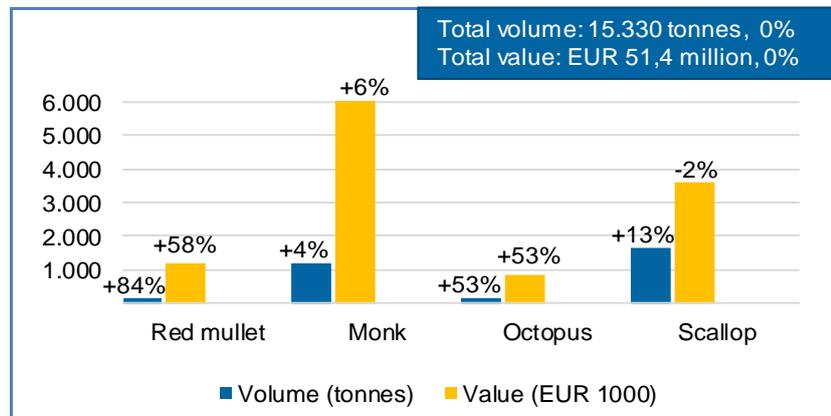
Figure 3. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN ESTONIA, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

 In **France** in **January–April 2019**, first sales decreased by 3% in value and slightly increased by 1% in volume over January–April 2018. The value of hake, cuttlefish, monk, and common sole, and the volume of scallop and sardine, were the factors most responsible for such changes. In **April 2019**, both first-sales value and volume remained stable compared to April 2018. Red mullet, monk, octopus, and scallop were among the top species which recorded the highest fluctuations in first sales, therefore contributing to the overall balance.

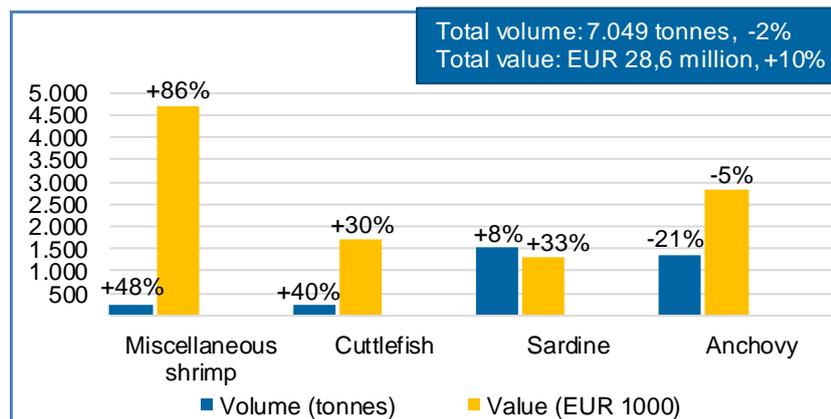
Figure 4. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN FRANCE, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

 In **Italy** in **January–April 2019**, compared to the same period in 2018, first-sales value and volume grew by 8% and 1%, respectively, mainly due to anchovy, sardine and miscellaneous shrimps. In **April 2019**, first sales increased in value and decreased in volume compared to April 2018. Miscellaneous shrimps were the main responsible for the value increase, while anchovy was the top contributing species causing the volume decrease. Average prices sharply increased for sardine (+24% to 0,85 EUR/kg).

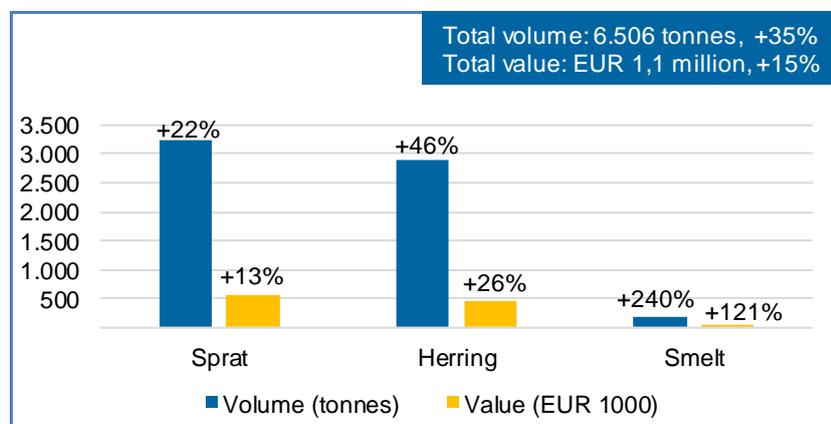
Figure 5. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN ITALY, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

 In **Latvia** in **January–April 2019**, herring was a primary driver of the first-sales value and volume increase (+4% and +14%, respectively) over the previous year. In **April 2019**, first sales increased compared to April 2018. Higher supplies of herring and sprat were the main factors behind the positive trends. Consequently, the average price of herring decreased by 14% to 0,16 EUR/kg, while that of sprat fell by 7% to 0,17 EUR/kg.

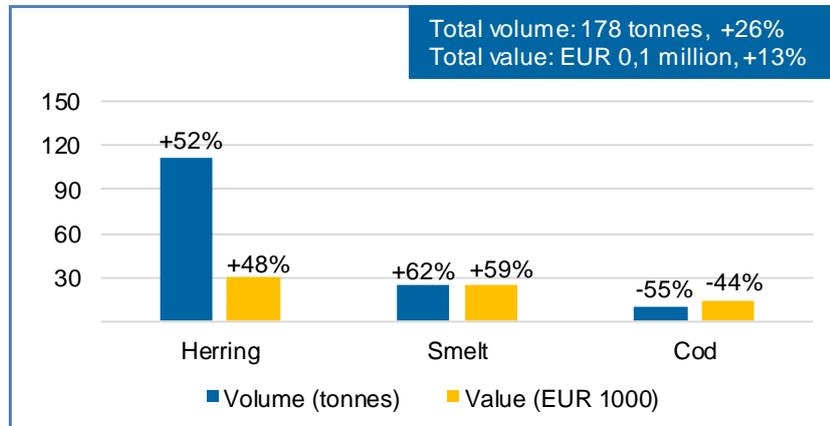
Figure 6. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN LATVIA, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

 In **Lithuania** in **January–April 2019**, first sales fell by 35% in both value and volume from January–April 2018, mainly driven by cod and herring. In **April 2019**, first sales increased over April 2018 due largely to herring and smelt. As for other important species in national fisheries, cod sales decreased by over a half. The average price of herring slightly fell by 3% to 0,27 EUR/kg, while that of smelt fell by 2% to 1,01 EUR/kg.

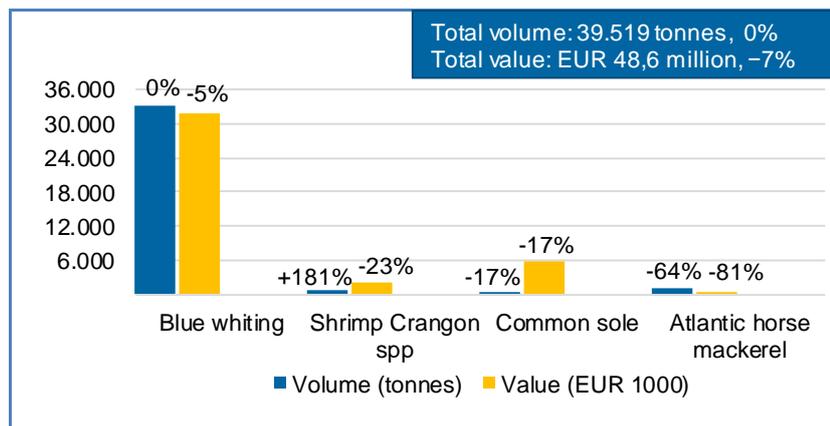
Figure 7. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN LITHUANIA, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

 In the **Netherlands** in **January–April 2019**, first-sales fell by 23% in value and 27% in volume compared to January–April 2018. The species most responsible for the decreases were blue whiting and Atlantic horse mackerel. In **April 2019**, first-sales value decreased (due to blue whiting, common sole, Atlantic horse mackerel), while volume remained stable compared with April 2018. Among the top valued species, the average price of Atlantic horse mackerel decreased by 49% to 0,51 EUR/kg, while those of shrimp *Crangon* spp. fell by 73% to 2,65 EUR/kg.

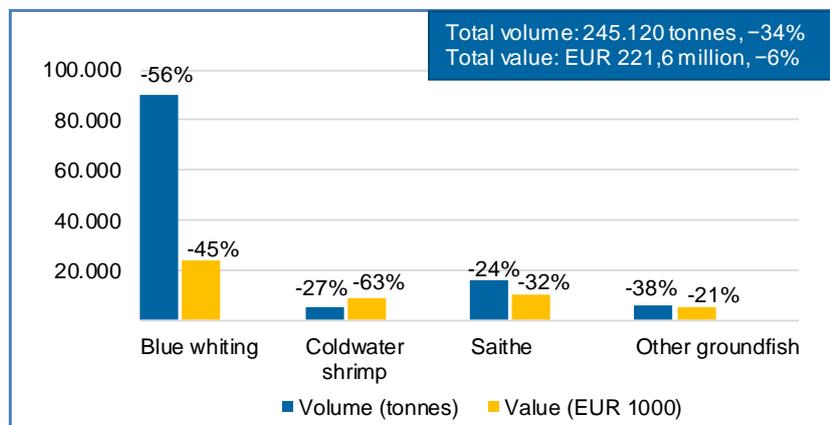
Figure 8. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

 In **Norway** in **January–April 2019**, first sales decreased by 5% in value and 23% in volume from the same period in 2018. The main contributors to these decreases were miscellaneous small pelagic species, saithe, and blue whiting. In **April 2019**, compared to April 2018, first-sales value and volume decreased for the same species as well as for coldwater shrimp. The price of blue whiting increased by 26% to 0,26 EUR/kg, and that of coldwater shrimp decreased by 49% to 1,70 EUR/kg.

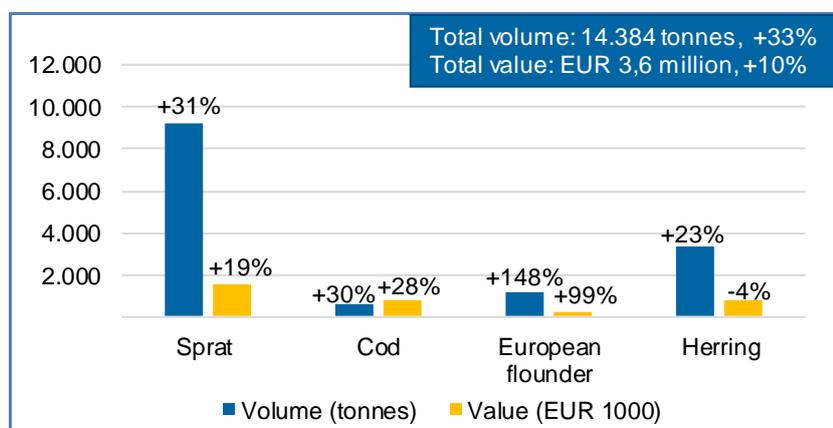
Figure 9. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN NORWAY, APRIL 2019**



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 17.06.2019).

 In **Poland** in **January–April 2019**, first sales decreased by 13% in value, while volume remained stable compared to the same period in 2018. The decline in value was mostly due to trout, herring, and sprat. In **April 2019**, first-sales value and volume recorded upward trends compared to April 2018, mainly because of sprat, cod, European flounder, and herring. For most of the key species price decreases were recorded. That of herring fell the most (-22% to 0,24 EUR/kg).

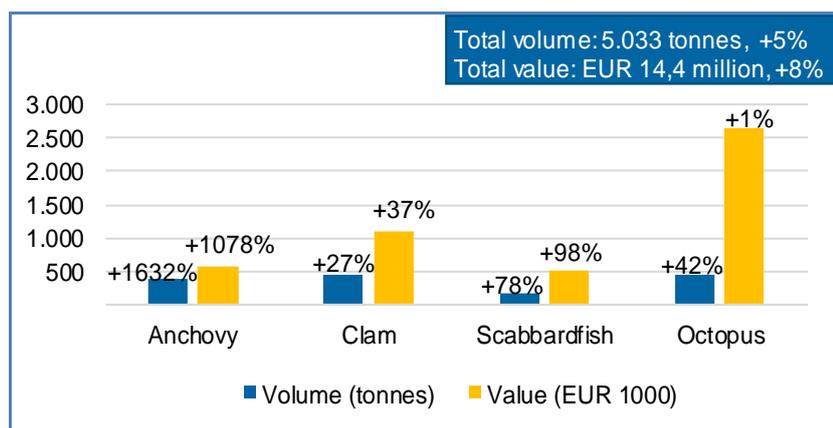
Figure 10. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN POLAND, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

 In **Portugal** in **January–April 2019**, first-sales increased by 22% in value, and by 29% in volume compared to the same period in 2018, mostly because of octopus and anchovy. In **April 2019**, first-sales value and volume continued to grow compared to April 2018, mainly because of anchovy, octopus, clam, and scabbardfish. Anchovy recorded a high average price decrease of 32% to 1,56 EUR/kg due to a 16-fold increase in its supply.

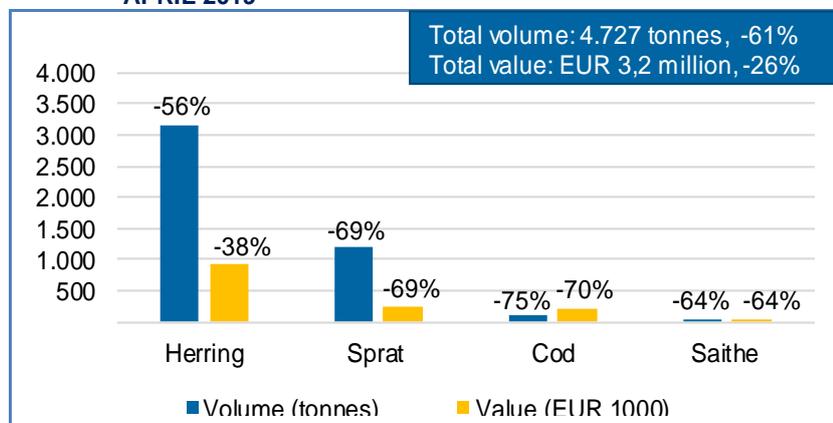
Figure 11. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN PORTUGAL, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

 In **Sweden**, first sales value (-21%) and volume (-30%) in **January–April 2019** from the same period in 2018, were caused mainly by herring and cod. In **April 2019**, both value and volume continued the downward trend from April 2018. This was due to small pelagic and groundfish species. The average price of herring grew by 42% to 0,29 EUR/kg, and that of cod increased by 19% to 1,89 EUR/kg.

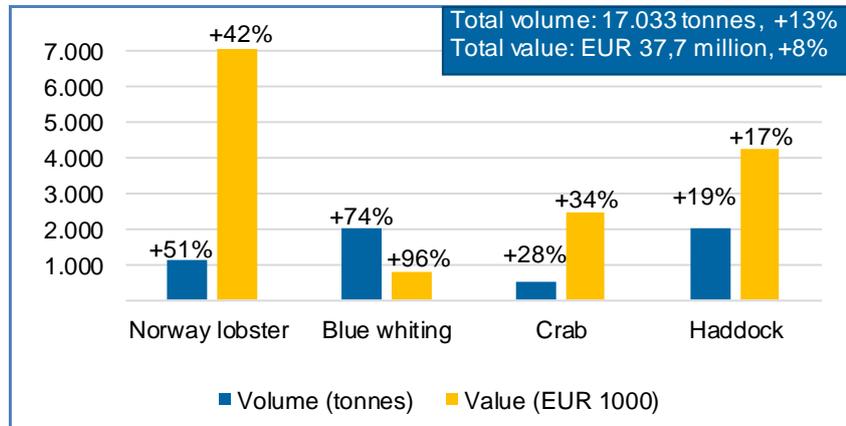
Figure 12. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN SWEDEN, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

 In the UK in **January–April 2019**, first-sales value and volume increased by 33% and 6%, respectively, compared to the same period in 2018. The increases were mainly caused by Norway lobster, mackerel, haddock, and saithe. In **April 2019**, higher first sales of blue whiting, Norway lobster, crab and haddock caused an overall first-sales increase over April 2018. The key species did not record high fluctuations in average prices, with an exception of European seabass, whose price went up by 55% to 12,38 EUR/kg, and of cod whose price increased by 29% to 3,14 EUR/kg.

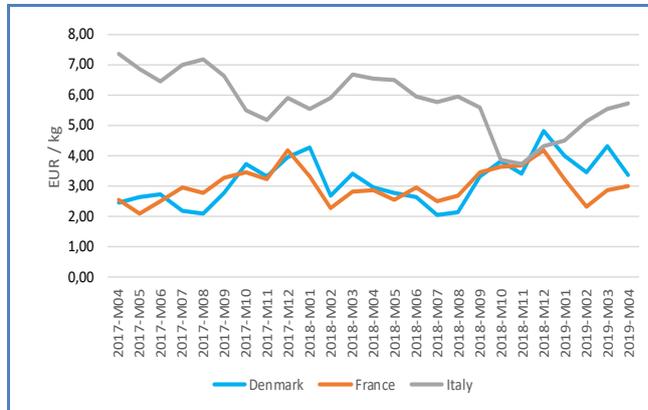
Figure 13. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN THE UK, APRIL 2019**



Percentages show change from previous year.
Source: EUMOFA (updated 17.06.2019).

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

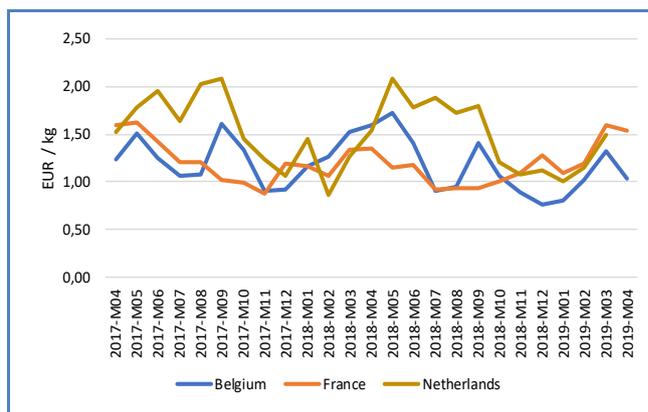
Figure 14. **FIRST-SALES PRICES OF HAKE IN DENMARK, FRANCE AND ITALY**



Source: EUMOFA (updated 17.06.2019).

First sales of **hake** in the EU take place in several countries Member States, but three – **Denmark, France, and Italy** – account for most such sales (nearly 75% by volume in 2018). The average prices in April 2019 were: 3,38 EUR/kg in Denmark (down by 22% from March 2019 but up by 15% from April 2018); 3,00 EUR/kg in France (up by 30% from the previous month and by 2% from a year earlier); 5,71 EUR/kg in Italy (up by 3% from March 2019 but down by 13% from April 2018). Italy usually has the highest price, and its trend moves in the opposite direction of those in Denmark and France. Prices in those countries are closely tied even though volumes sold in the two countries don't follow the same trend. Over the two-year period under review, volumes in Denmark and France have generally declined and prices have generally risen. Volume in Italy has shown a fluctuating trend and the price has irregularly declined during April 2017–April 2019.

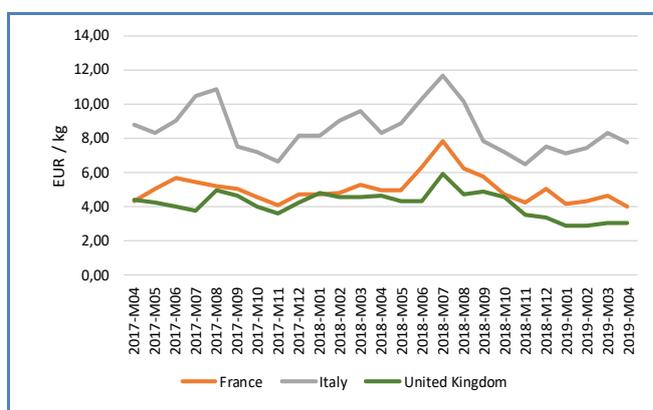
Figure 15. **FIRST-SALES PRICES OF GURNARD IN BELGIUM, FRANCE AND THE NETHERLANDS**



Source: EUMOFA (updated 17.06.2019).

Most EU first sales of **gurnard** occur in **Belgium, France, and the Netherlands**, which together accounted for 82% by volume of first sales of gurnard in 2018. In April 2019, average prices were 1,03 EUR/kg in Belgium (down by 22% from March 2019 and by 35% from April 2018); and 1,53 EUR/kg in France (up by 29% from the previous month and by 30% from a year earlier). In the Netherlands the most recent reported first sales took place in March, at an average price of 1,50 EUR/kg, up by 30% from the previous month and by 18% from one year earlier. Although volume trends in these three markets move in different directions, the prices move together, meaning other market factors are involved, including proximity of the three markets, allowing buyers to source their purchases from any market. This ability tends to make prices in different markets more aligned. There is a slight downward trend in prices over the two-year observed period, but no clear trend in volumes.

Figure 16. **FIRST-SALES PRICES OF CUTTLEFISH IN FRANCE, ITALY AND THE UK**



Source: EUMOFA (updated 17.06.2019).

EU first sales of **cuttlefish** take place mainly in **France, Italy**, and the **UK** (84%). In April 2019, the average prices of cuttlefish were: 3,98 EUR/kg in France (down by 14% from March 2019 and by 19% from April 2018); 7,76 EUR/kg in Italy (up by 4,4% from the previous month but down by 25% from a year earlier); 3,01 EUR/kg in the UK (stable compared to March 2019 and down by 35% compared to April 2018). There is a high degree of correlation in prices between these three markets as well as inverse correlation with supplies. The decline in price during August–November 2017 and the more recent decline during July–November 2018 occurred during periods of rising supplies. The peak price in July 2018 (rising as high as 11,68 EUR/kg in Italy) occurred in a month with exceptionally low volumes sold in all markets.

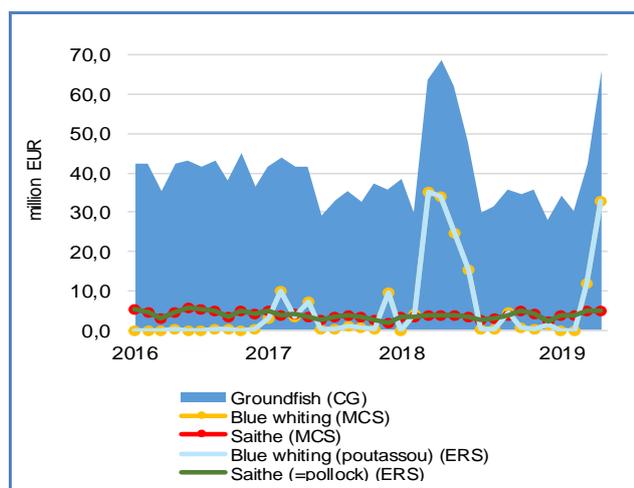
1.5. Commodity group of the month: groundfish

The **groundfish** commodity group (CG) ranked 1st in value and 2nd in volume among 11 CGs sold at the first-sales stage in April 2019². First sales of these species reached EUR 65,3 million and 53.077 tonnes, decreasing by 4% in value and slightly increasing (+1%) over April 2018. In the past 36 months, the highest value of groundfish first sales was registered in April 2018, at about EUR 68,6 million.

Groundfish includes 12 main commercial species (MCS): blue whiting, cod, grenadier, hake, haddock, ling, pollack, pouting, redfish, saithe, whiting and other groundfish.

At ERS level, blue whiting and saithe together made up 57% of total reported first-sales value of groundfish species in April 2019.

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



Source: EUMOFA (updated 17.06.2019).
*Norway excluded from the analyses.

1.6. Focus on blue whiting



Blue whiting (*Micromesistius poutassou*) is a species closely related to cod, haddock and hake, and is widely distributed in the eastern and western North Atlantic and the Mediterranean. It reaches between 25 cm and 35 cm in total length, up to 50 cm maximum. Growth is rapid in the first two years of life and slows once the fish reaches maturity (2 to 4 years). Spawning occurs from February in the south, to May in the

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

north, at depths from 180 m to 360 m. Blue whiting form mid-water shoals at depths from 160 m to 1500 m. Adult fish are most common between 200 m and 600 m and tend to form characteristic, horizontal layers in the water column³.

Blue whiting has a great economic importance and it is caught mainly by large midwater trawls, towed at a depth of 200-500 m, either in very deep water or close to the seabed when the fish layer is near the edge of the shelf⁴.

The fish is marketed fresh for human consumption as well surimi products in some areas. A large part of the catches is processed industrially as fish oil and fishmeal (mainly due to difficulties encountered in the conservation of the flesh, and also for the high demand for fishmeal)⁵.

The blue whiting fishery is regulated by a Total Allowable Catch (TAC), with the greatest share to the European Union, even if through quota swaps Norway has been holding the largest annual quotas⁶. There is no minimum landing size in place for blue whiting but there are minimum marketing standards⁷. International cooperation on the management of the blue whiting stock is largely coordinated by the North East Atlantic Fisheries Commission (NEAFC), which is the Regional Fisheries Management Organisation (RFMO) for the North East Atlantic⁸.

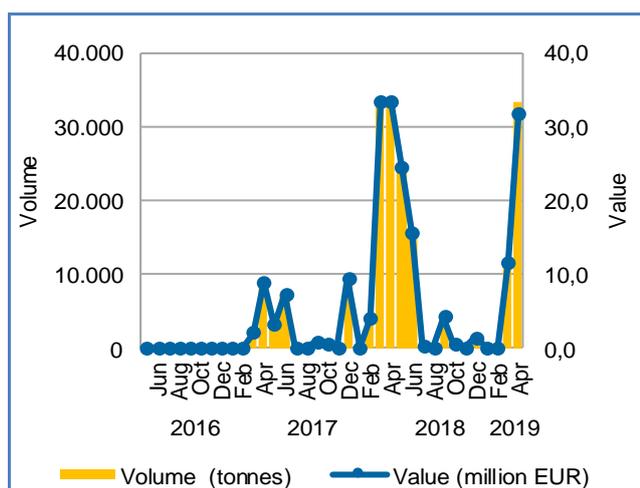
Selected countries

In the **Netherlands** in January–April 2019, first sales of blue whiting decreased by 39% in value and by 37% in volume compared with the same period in 2018. Compared to 2017, first-sales increased by three-fold in both value and volume. The industry considers recruitment to have been good over the last three years⁹.

Of groundfish species sold in April 2019, blue whiting accounted for almost all of first-sales value and volume. Most of the catches were taken in the first two quarters of the year and the bulk of the catch is caught with large midwater pelagic trawlers¹⁰. The Dutch fleet consists of deep-sea freeze trawlers that fish and freeze on board blue whiting in the North East Atlantic but also in West African seas and near the coast of Chile¹¹.

IJmuiden/Velsen on the North Sea coast is the most important port for blue whiting in terms of first-sales value.

Figure 18. **BLUE WHITING: FIRST SALES IN THE NETHERLANDS**



Source: EUMOFA (updated 17.06.2019).

³ Blue Whiting Quality Guide.

⁴ <http://www.fao.org/3/x5952e/x5952e01.htm>

⁵ <https://www.roysfarm.com/blue-whiting-fish/>

⁶ https://www.regjeringen.no/en/historical-archiv/Stoltenbergs-2nd-Government/Ministry-of-Fisheries-and-Coastal-Affair/Nyheter_og_pressemeldinger/Pressemeldinger/2005/broad-agreement-on-fisheries-between-nor/id419750/

⁷ COUNCIL REGULATION (EC) No 2406/96 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:31996R2406&from=EN>

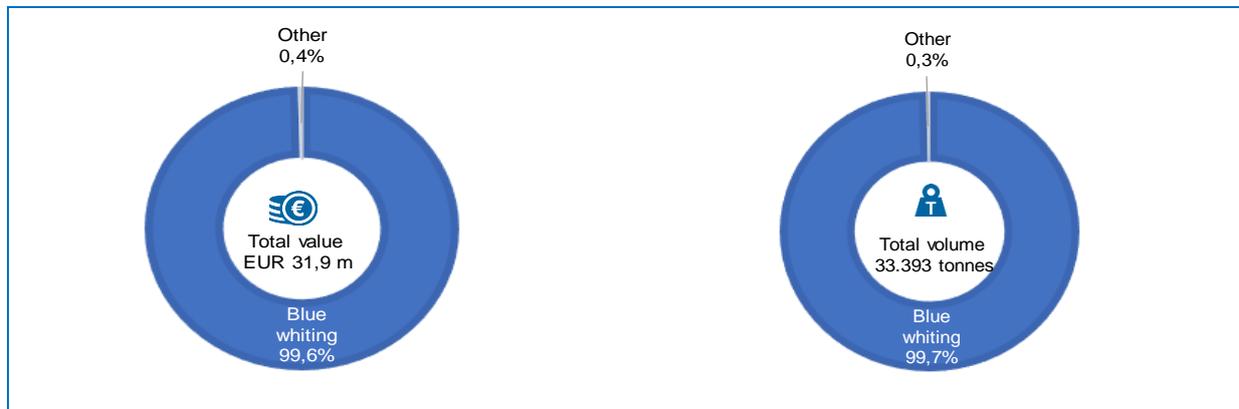
⁸ <http://www.iffo.net/files/iffoweb/approved-raw-materials/whole-fish/faroe-islands-blue-whiting-initial-assessment-may.pdf>

⁹ <https://www.ices.dk/community/advisory-process/pages/latest-advice.aspx>

¹⁰ https://www.fishsource.org/fishery_page/3050

¹¹ https://fas-europe.org/downloads/95/netherlands/3372/seafood-industry_netherlands_2019.pdf

Figure 19. **FIRST-SALES COMPARISON OF GROUND FISH SPECIES (ERS) IN THE NETHERLANDS, VALUE AND VOLUME, APRIL 2019**



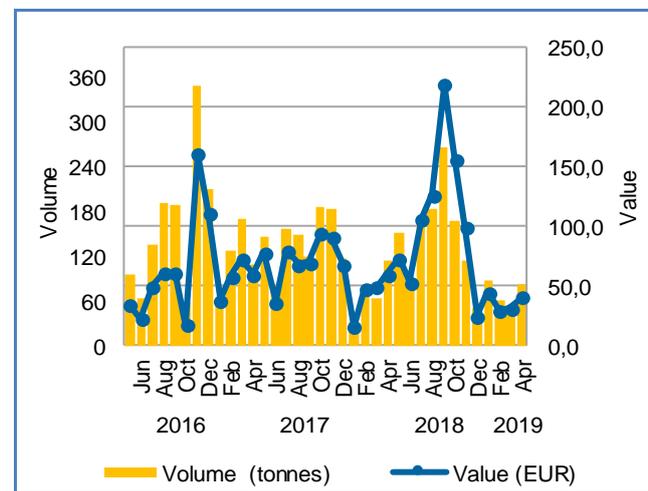
Source: EUMOFA (updated 17.06.2019).

In **Portugal** in January–April 2019, first sales of blue whiting decreased by 14% in value and by 3% in volume compared to January–April 2018. The decrease in value surpassed the decrease in volume due to a fall in average price of 11%. Compared with January–April 2017, first-sales value was down by 36%, while volume fell by 40%.

Of groundfish species sold in April 2019, blue whiting composes 7% of total value and 27% of volume. Off the Portuguese coast blue whiting is a bycatch in bottom trawl fisheries catching groundfish (hake, horse mackerel, monkfish, megrim) and crustaceans (Norway lobster)¹².

Matosinhos, Sines and Vila Real de Santo António are the fishing ports where most first sales of blue whiting occur.

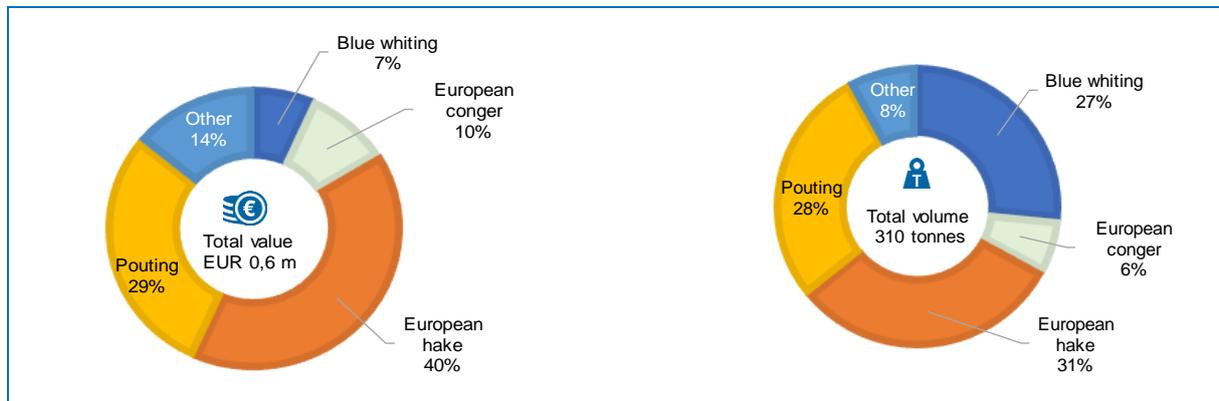
Figure 20. **BLUE WHITING: FIRST SALES IN PORTUGAL**



Source: EUMOFA (updated 17.06.2019).

¹²https://www.researchgate.net/publication/234556225_Blue_whiting_Micromesistius_poutassou_as_a_forage_fish_in_Portuguese_waters

Figure 21. **FIRST-SALES COMPARISON OF GROUND FISH SPECIES (ERS) IN PORTUGAL, VALUE AND VOLUME, APRIL 2019**



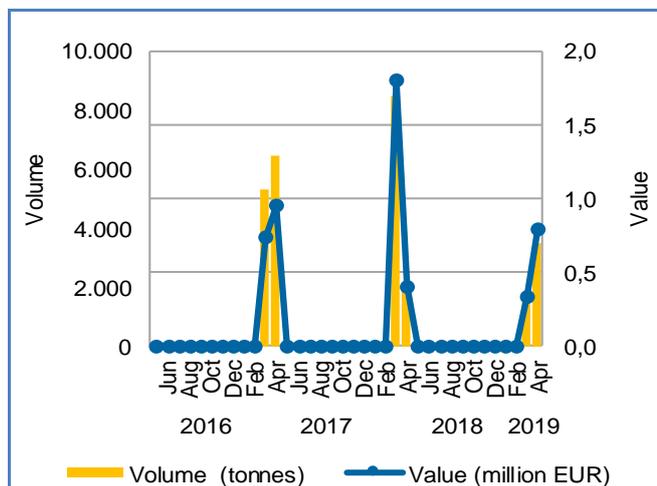
Source: EUMOFA (updated 17.06.2019).

In the **UK** in January–April 2019, first-sales value and volume fell by about a half from the same period in 2018. Compared with the same period in 2017, first-sales decreased by 33% in value and by 57% in volume.

Of groundfish species sold in April 2019, blue whiting accounted for 7% of total value and 37% of volume. In the UK, blue whiting forms an important annual eight-week fishery¹³ that generally starts in late February or March when blue whiting spawn in these area and migrate northwards to the Norwegian Sea¹⁴.

The main ports for first sales of blue whiting are Peterhead and Fraserburgh on the coast of the North Sea.

Figure 22. **BLUE WHITING: FIRST SALES IN THE UK**

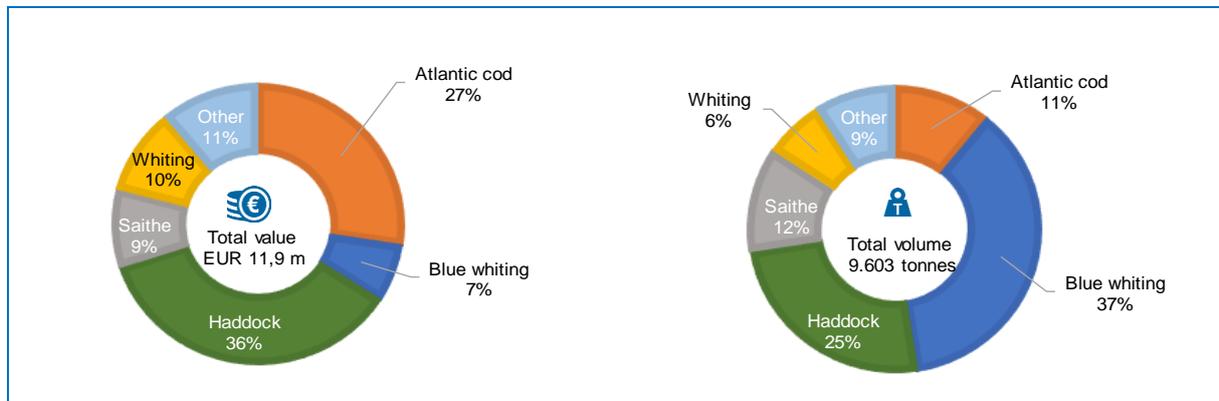


Source: EUMOFA (updated 17.06.2019).

¹³ <https://www2.gov.scot/Topics/marine/marine-environment/species/fish/pelagic>

¹⁴ <https://www.spsg.co.uk/blue-whiting-fishery-sustains-vital-jobs/>

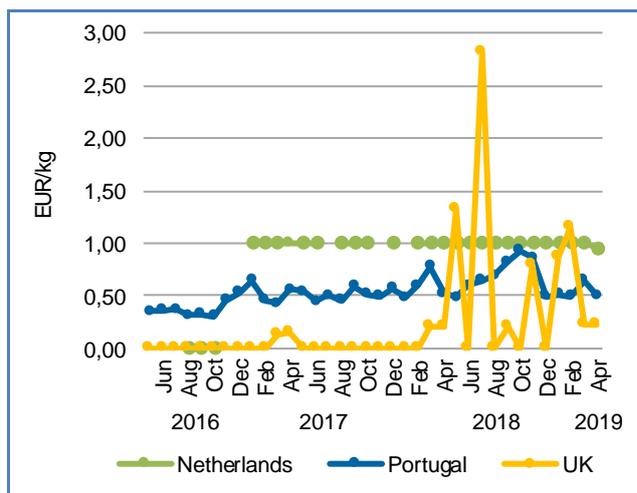
Figure 23. **FIRST-SALES COMPARISON OF GROUND FISH SPECIES (ERS) IN THE UK, VALUE AND VOLUME, APRIL 2019**



Source: EUMOFA (updated 17.06.2019).

Price trends

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



Source: EUMOFA (updated 17.06.2019).

In the observed 36-month period (May 2016–April 2019), the highest average price of blue whiting was recorded in the Netherlands (1,00 EUR/kg), 86% higher than in **Portugal** (0,54 EUR/kg), and 45% more than the price in the UK (0,69 EUR/kg). The higher price level in the Netherlands could be explained by intra-trade first sales within fishing companies that target blue whiting.

In the **Netherlands** in April 2019, the average first-sales price (internal price) of blue whiting (0,96 EUR/kg) decreased by 4% from the same period in 2018. During the past 36 months, the average price remained stable at 1,00 EUR/kg.

In **Portugal**, the average price of 0,50 EUR/kg in April 2019 was 4% lower than in 2018 and by 10% lower than April 2017. The highest price was recorded in October 2018 when 168 tonnes were sold at 0,93 EUR/kg, while the lowest occurred in October 2016 at 0,30 EUR/kg for 58 tonnes.

In the **UK** in April 2019, the average price (0,23 EUR/kg) was up by 12% over April 2018, and by 54% over the same month in 2017. In the past 36 months, the lowest price (0,14 EUR/kg) was registered in March 2017, when 5.303 tonnes of blue whiting were sold. The highest price occurred in July 2018 at 2,82 EUR/kg when supply was scarce.

1.7. Focus on saithe (=pollock)



Saithe (*Pollachius virens*) is a marine fish species in the *Pollachius* genus. Its flesh is dark coloured which can lead to the undeserved reputation of this fish as poor for eating. It is common in the Northern Atlantic, including the Bay of Biscay, the North Sea, the Baltic Sea and in Scandinavian and Icelandic waters. Adults can grow up to 130 cm and weigh up to 32 kg. The fish can be found close to the shore, particularly in rocky areas¹⁵. It spawns in spring in deeper water of at least 100 m and it can live up to 10 years.

Saithe is of great commercial value to fisheries. It is often taken as bycatch by trawlers, although some vessels target this species. It is mainly caught with static gears: gillnets, longlines, handlines, and jiggers on rocky ground and wrecks. The species' preference for wrecks and rocky bottoms makes them difficult to catch with trawls. In 2016, the main EU fishing countries for saithe in volume are France (35%), the UK (30%), Germany (18%), and Denmark (10%)¹⁶.

In the EU, saithe fisheries are subject to technical measures and total allowable catches (TACs), which are allocated by the European Council every year for certain fish stocks and groups of fish stocks¹⁷. A minimum landing size of 35 cm is in force and is common for all European waters, except in the Norwegian zone, where it is 40 cm¹⁸. Since 2009, the EU fleets fishing for saithe have fallen under the effort regime of the EU cod management plan¹⁹. Saithe is also an important catch in recreational fisheries.

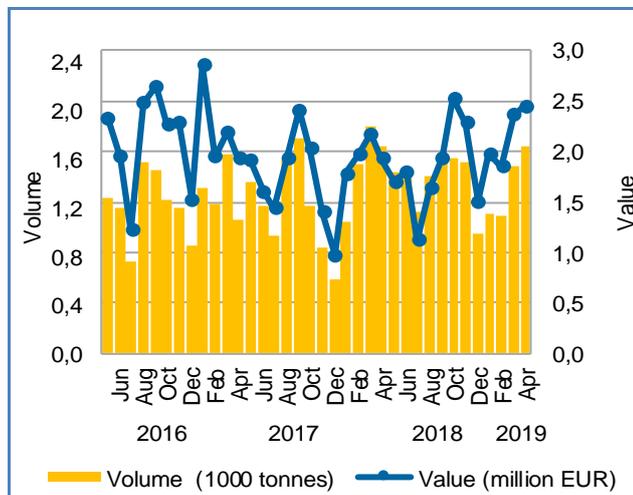
Selected countries

In **Denmark** in January–April 2019, saithe first sales grew by 10% in value, but fell 11% in volume from the same period in 2018. This was due to an average price increase of 24%. Compared to the same observed period in 2017, first-sales value was down by 3% and volume increased by 4%.

Saithe accounted for 35% of value and nearly half of volume among groundfish species sold in April 2019. The saithe fishery is characterized by regular seasonal fluctuations in catches, and in general, the high season is in spring, and low in winter.

The main ports for first sales of saithe were Hanstholm, Thyborøn and Skagen on the coast of the North Sea.

Figure 25. SAITHE: FIRST SALES IN DENMARK



Source: EUMOFA (updated 17.06.2019).

¹⁵ <https://britishseafishing.co.uk/coalfish/>

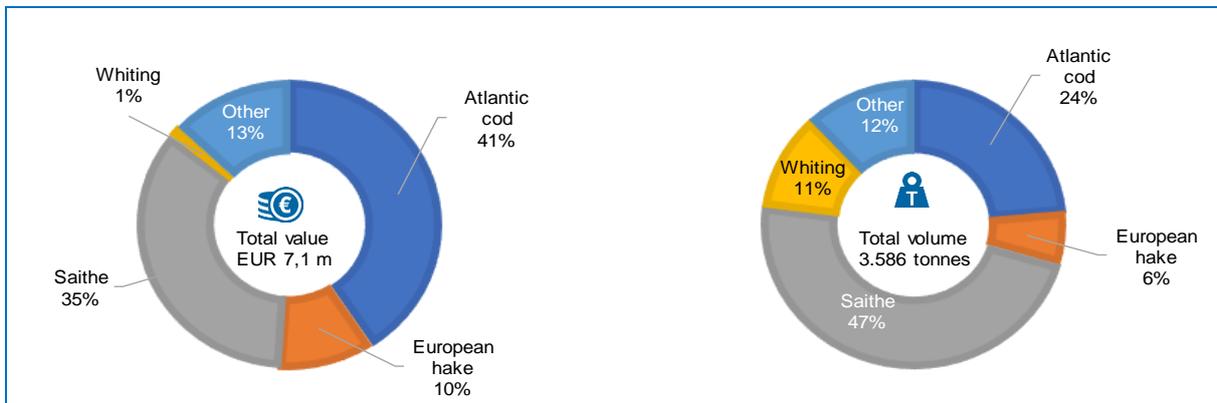
¹⁶ <https://www.eumofa.eu/documents/20178/127117/Saithe+fresh+fillet+in+France.pdf>

¹⁷ COUNCIL REGULATION (EU) 2019/124 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32019R0124>

¹⁸ COUNCIL REGULATION (EC) No 2406/96 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:31996R2406&from=EN>

¹⁹ COUNCIL REGULATION (EC) No 1342/2008 <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32008R1342&from=EN>

Figure 26. **FIRST-SALES COMPARISON OF GROUND FISH SPECIES (ERS) IN DENMARK, VALUE AND VOLUME, APRIL 2019**



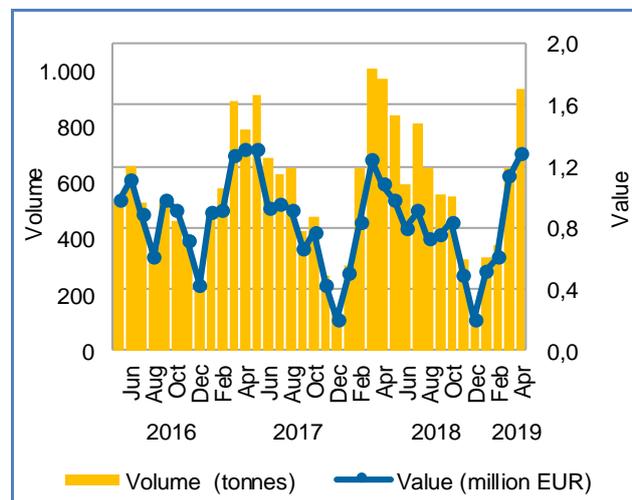
Source: EUMOFA (updated 17.06.2019).

In **France** in January–April 2019, first sales of saithe fell by 3% in value and 22% in volume from the same period in 2018. Compared to 2017, first-sales value and volume in 2019 decreased by 19% and 17%, respectively.

Saithe accounted for 12% of value and 19% of volume among groundfish first sales registered in April 2019. The saithe fishery mostly taking place between February and May and mainly operated by offshore trawlers landing fresh fish and freezer trawlers.

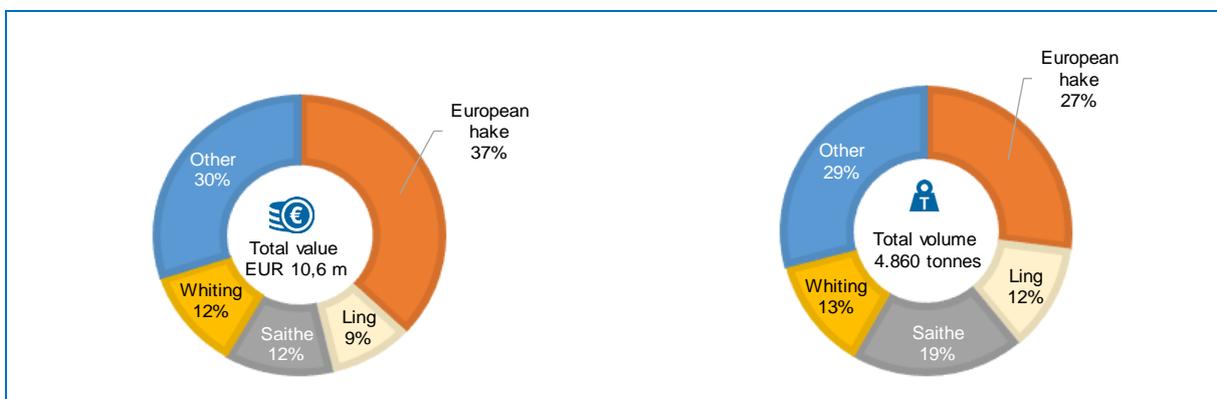
The port of Boulogne-Sur-Mer on the coast of the North Sea was the main ports for first sales of saithe in whole 2018 and January–April 2019.

Figure 27. **SAITHE: FIRST SALES IN FRANCE**



Source: EUMOFA (updated 17.06.2019).

Figure 28. **FIRST-SALES COMPARISON OF GROUND FISH SPECIES (ERS) IN FRANCE, VALUE AND VOLUME, APRIL 2019**

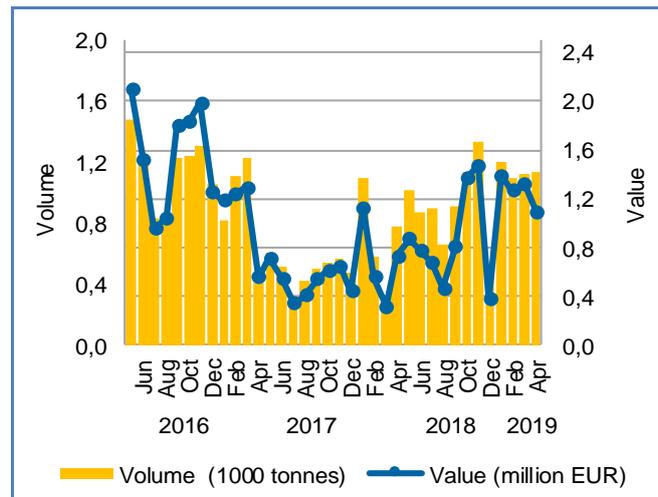


Source: EUMOFA (updated 17.06.2019).

In the **UK** in January–April 2019, first sales of saithe increased by 86% in value and 63% in volume compared to January–April 2018. In comparison with the same period in 2017, first-sales value and volume increased by 19% and 28%, respectively. Among the groundfish species, saithe's share accounted for 9% of value and 12% of volume in April 2019.

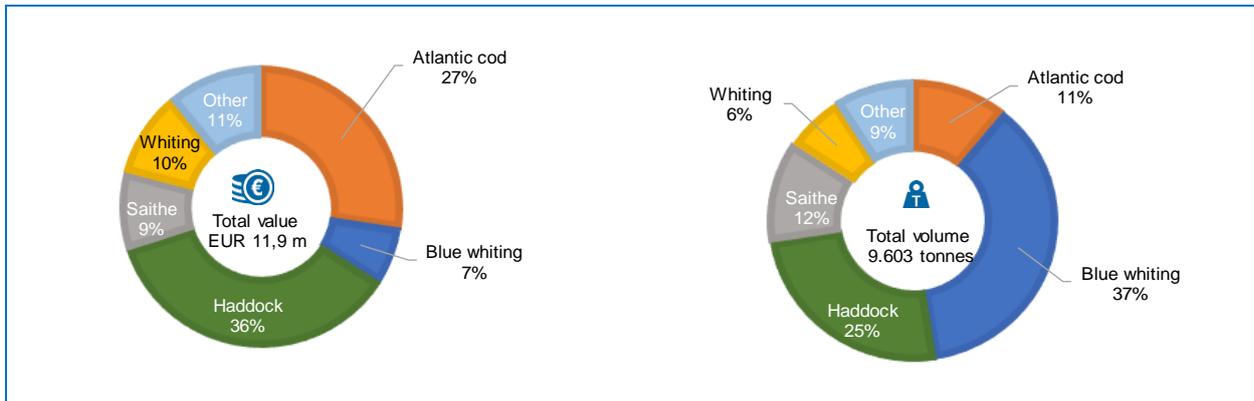
Peterhead and Lerwick on the coast of the North Sea were the ports with the highest first sales of saithe.

Figure 29. SAITHE: FIRST SALES IN THE UK



Source: EUMOFA (updated 17.06.2019).

Figure 30. FIRST-SALES COMPARISON OF GROUND FISH SPECIES (ERS) IN THE UK, VALUE AND VOLUME, APRIL 2019



Source: EUMOFA (updated 17.06.2019).

Price trends

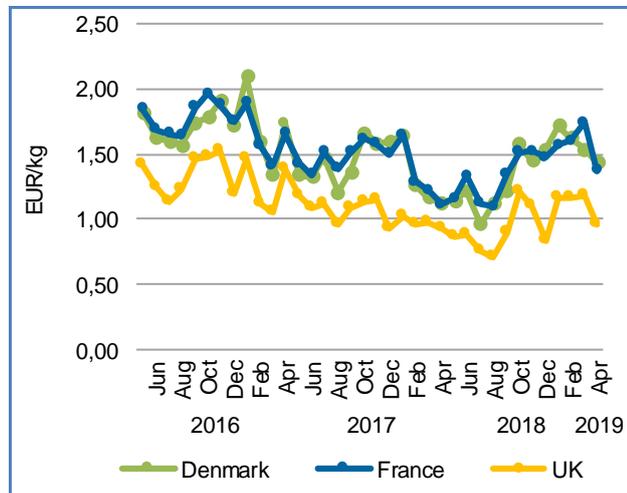
For the past 36 months (May 2016–April 2019), the highest average price of saithe was observed in France (1,52 EUR/kg), 2% more than in Denmark (1,49 EUR/kg) and 37% above the price in the UK (1,11 EUR/kg). In the three surveyed countries, in the past three years, the price fluctuates in line with supply availability and TACs allocation.

In **Denmark** in April 2019, the price was at 1,43 EUR/kg, significantly higher than in April 2018 (+27%), but 18% lower compared to April 2017. The highest price was recorded in January 2017, at 2,09 EUR/kg for 1,4 tonnes, while the lowest price was registered in July 2018 when 1,2 tonnes were sold at 0,96 EUR/kg.

In **France**, the average price of saithe in April 2019 was 1,37 EUR/kg, an increase of 23% over April 2018 and a decrease of 17% from April 2017. The highest average price occurred in October 2016 when 468 tonnes were sold for 1,96 EUR/kg. The lowest average price occurred in August 2018 at 1,10 EUR/kg for 658 tonnes.

In the **UK** in April 2019, the average price of saithe was 0,96 EUR/kg, which was the lowest among the surveyed countries. It increased by 3% over April 2018, while decreased by 30% from April 2017. The highest price was recorded in November 2016 when 1,3 tonnes were sold at 1,52 EUR/kg. The lowest occurred in August 2018 at 0,70 EUR/kg for 0,7 tonnes.

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



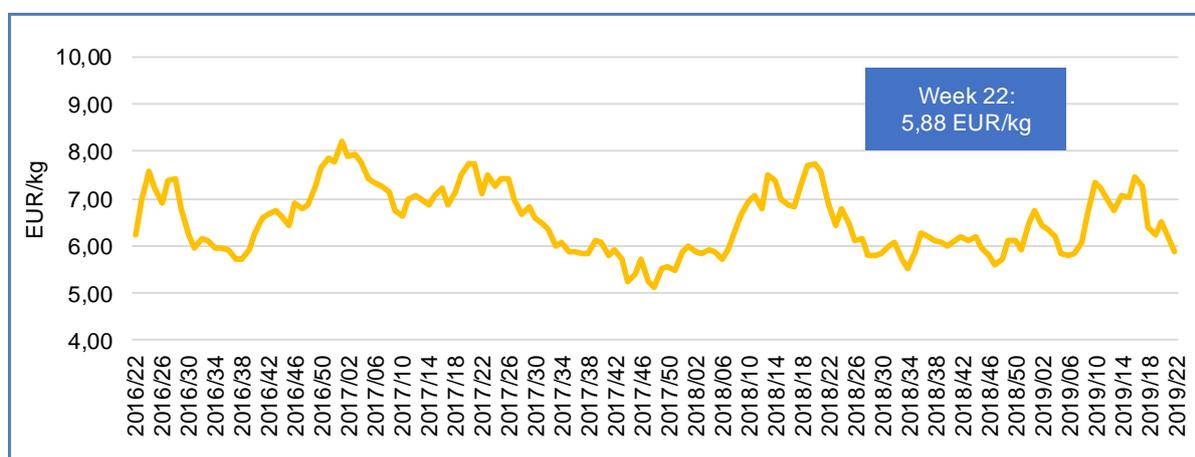
Source: EUMOFA (updated 17.06.2019).

2 Extra-EU imports

Each month, weekly extra-EU import prices (average unit values per week, in EUR per kg) are examined for nine species. Three species, which are the most relevant in terms of value and volume, are examined every month: frozen Alaska pollock fillets from China, fresh whole Atlantic salmon from Norway, and frozen tropical shrimp (genus *Penaeus*) from Ecuador. The other six change every month: three are from the commodity group of the month (groundfish in this month): fresh whole Cape hake and deepwater hake from Namibia, frozen blue grenadier fillets from New Zealand, and dried, salted cod from Norway; along with other three products and this month include prepared or preserved mussels from Chile, prepared or preserved shrimps and prawns from Greenland, and frozen whole tilapia from China.

The weekly price of **fresh whole Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway** continued to slide in the last week of May (week 22), dropping to 5,88 EUR/kg. This was 7% below the average for the preceding four weeks and 15% below the price a year earlier. Volume in week 22 of 12.260 tonnes was up slightly (+3%) from the previous four-week average. Price is very responsive to volume in the short term: the price peaks in recent years are all associated with tight supplies, and the general decline during 2017 coincided with an irregular increase in volume during the same period.

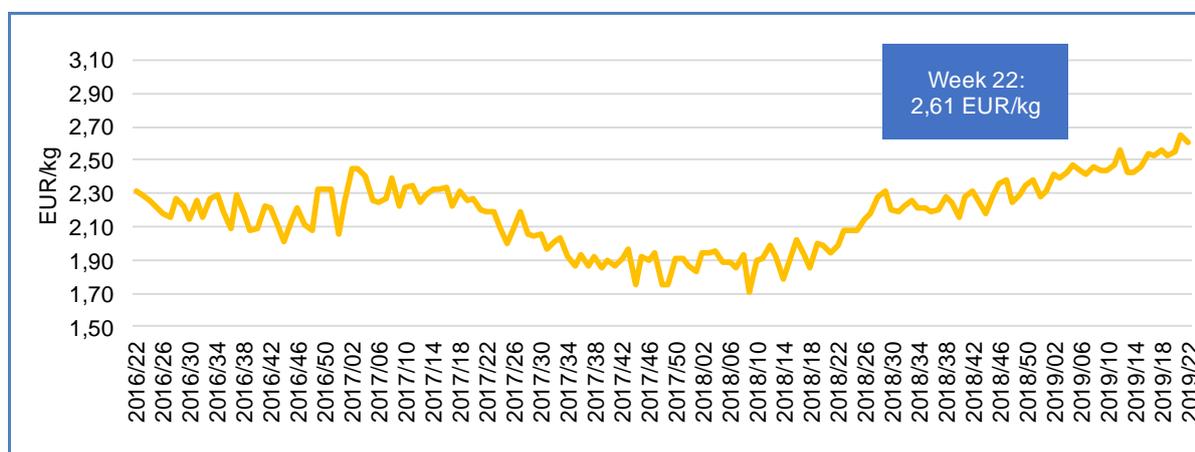
Figure 32. IMPORT PRICE OF ATLANTIC SALMON, FRESH WHOLE FROM NORWAY



Source: European Commission (updated 17.06.2019).

For **frozen fillets of Alaska pollock** (*Theragra chalcogramma*, CN code 03047500) imported from **China**, the price in week 22 fell slightly to 2,61 EUR/kg. However, this was still slightly above (1%) the average price in the preceding four weeks, as the price has been continuing its gradual, irregular recovery from the low point of 1,71 EUR/kg in early 2018. Volume continues to be erratic, with no discernible trend during the 156-week period under review.

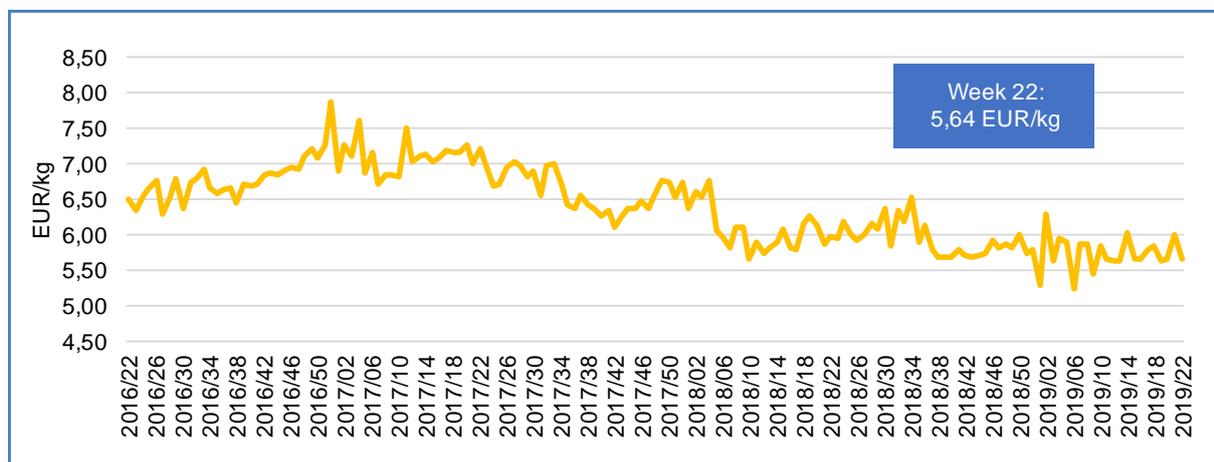
Figure 33. IMPORT PRICE OF ALASKA POLLOCK, FROZEN FILLETS FROM CHINA



Source: European Commission (updated 17.06.2019).

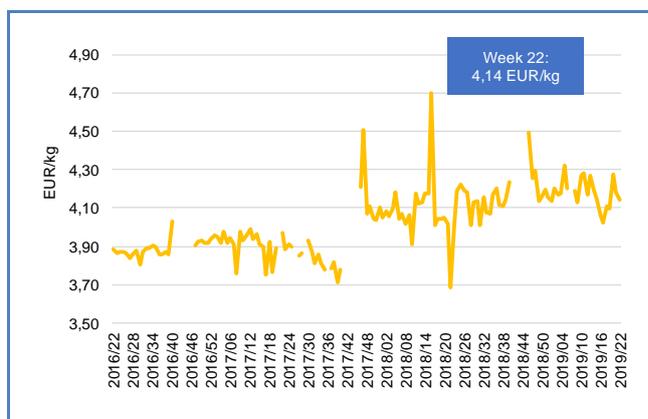
The price of **frozen tropical shrimp** (genus *Penaeus*, CN code 03061792) from **Ecuador** reached 5,64 EUR/kg in week 22, down by 2% from the average during the preceding four weeks and by 5% from the same week in 2018. Volume in week 22 was down significantly (-39%) from the previous four-week average. There is a “glut” of tropical shrimp on world markets, but this has not deterred Ecuador’s industry from investing in added capacity. Most Ecuadorian shrimp is exported to Asia, where consumer demand continues to grow.

Figure 34. IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR



Source: European Commission (updated 17.06.2019).

Figure 35. IMPORT PRICE OF CAPE HAKE AND DEEPWATER HAKE FROM NAMIBIA

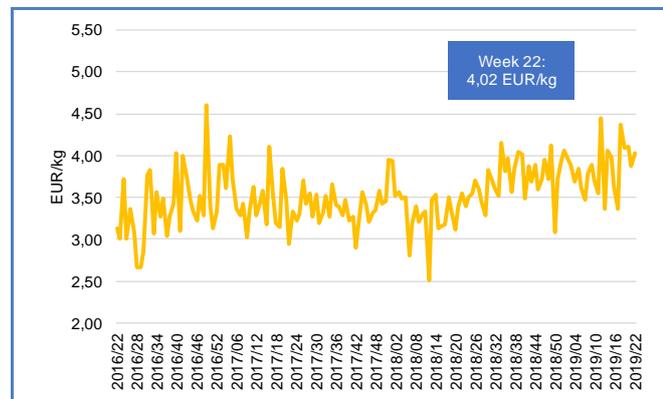


Source: European Commission (updated 17.06.2019).

For **Cape hake** (*Merluccius capensis*) and **deepwater hake** (*M. paradoxus*) (CN code 03025411) from **Namibia**, the price (an average for two similar species) in week 22 was 4,14 EUR/kg, 1% below the average for the preceding four weeks and 13% above the price in week 22 of 2018. Volume of 38,2 tonnes was 2% below the four-week average but 147% higher than the volume one year earlier. Volume is highly volatile from one week to the next, with a clear seasonal pattern: it drops to zero in late November/early December, followed shortly thereafter by annual peaks in supply. Price, however, is not nearly as volatile. However, it shows a long-run upward trend: during the 52-week period ending in week 22 of 2019, the average price was 4,16 EUR/kg, up from 4,01 EUR/kg in the preceding 52-week period, and 3,90 EUR/kg in the same period before that.

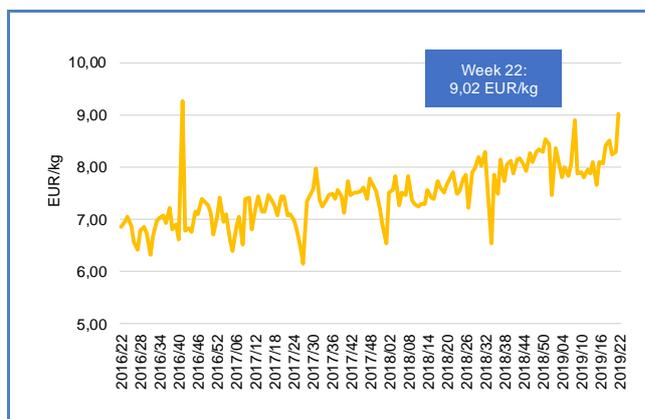
The price of **frozen fillets of blue grenadier** (*Macruronus novaezelandiae*, CN code 03047950) from New Zealand was 4,02 EUR/kg in week 22, 2% lower than the average of the preceding four weeks but still part of a general upward trend that began in 2012 and accelerated after March 2018 when it hit a low of 2,51 EUR/kg. Volume is highly seasonal, peaking in December and finding troughs in New Zealand's winter months. However, there is no clear longer-run trend in volume as there is in price.

Figure 36. **IMPORT PRICE OF FROZEN FILLETS OF BLUE GRENAIER FROM NEW ZEALAND**



Source: European Commission (updated 17.06.2019).

Figure 37. **IMPORT PRICE OF DRIED, SALTED COD FROM NORWAY**

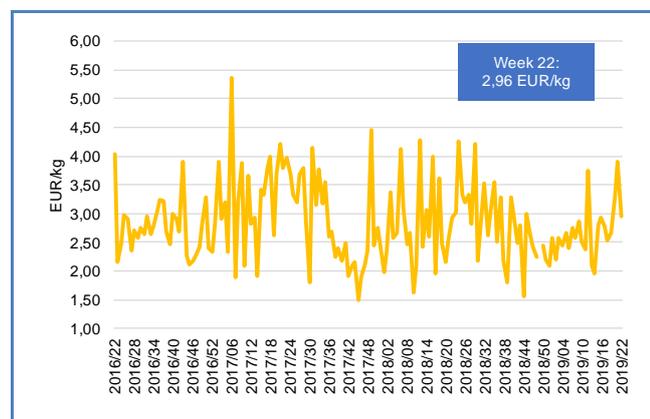


Source: European Commission (updated 17.06.2019).

The price of **mussels** in airtight containers, **prepared** or **preserved** (CN code 16055310) from **Chile** was 2,96 EUR/kg in week 22, down by 4% from the average during the previous four weeks and up by 1% from a year earlier. This price is very erratic in the short-run but it is not clearly correlated with changes in (equally erratic) weekly volumes. Volume is seasonal, with low points around the beginning of each year and high points six months later. There are no clear long-run trends in either price or volume.

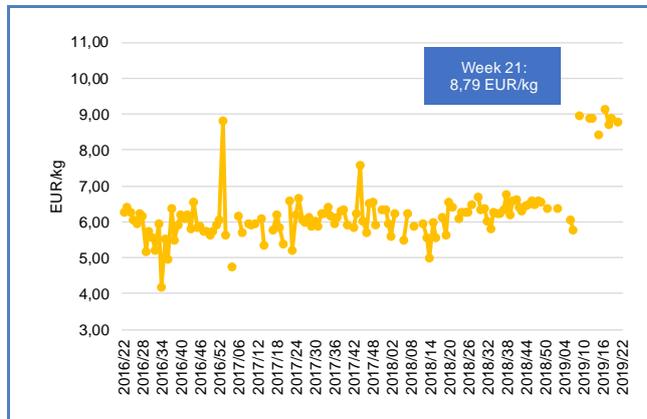
The import price of **dried, salted cod** (*Gadus morhua*, *Gadus ogac*, *Gadus macrocephalus*, CN code 03055190) from **Norway** reached 9,02 EUR/kg in week 22. Volume was low (313 tonnes) but not exceptionally. Weekly volume of this product is unusually cyclical, completing two cycles per year with troughs at the beginning of the year and again about six months later, and peaks midway in between. In the longer run (from early 2013), there has been a gradual decline in volume and a corresponding increase in price.

Figure 38. **IMPORT PRICE OF PREPARED OR PRESERVED MUSSEL FROM CHILE**



Source: European Commission (updated 17.06.2019).

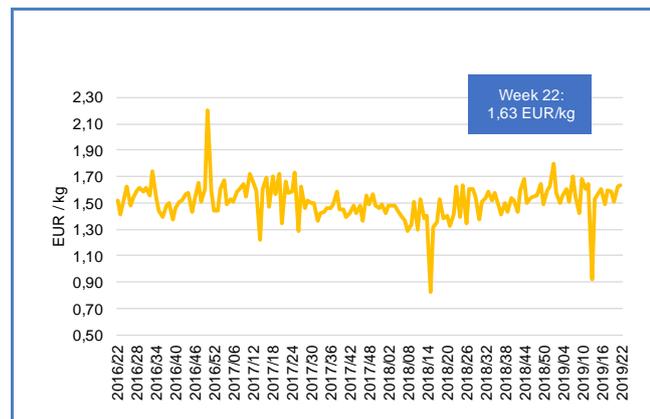
Figure 39. **IMPORT PRICE OF PREPARED OR PRESERVED SHRIMPS AND PRAWNS FROM GREENLAND**



Source: European Commission (updated 17.06.2019).

The price of **frozen whole tilapia** (*Oreochromis* spp., CN code 03032300) from **China** was 1,63 EUR/kg in week 22, up by 4% from the previous four weeks' average and by 16% from the price in week 22 of 2018. This price has shown occasional erratic behaviour in the last three years, but neither the upward nor downward spikes are correlated with inverse changes in volume. There are no significant long-run trends in price or volume for this product.

Figure 40. **IMPORT PRICE OF FROZEN WHOLE TILAPIA FROM CHINA**



Source: European Commission (updated 17.06.2019).

For **shrimps and prawns, prepared or preserved** (CN code 16052900) from **Greenland**, the price in week 21 (the latest available report) was 8,79 EUR/kg, a decrease of 2% from the four-week average and an increase of 37% over the price in the same week of 2018. Volume of 804 tonnes in week 21 was 3% higher than the four-week average and 2% over the volume a year earlier. The price is loosely correlated with weekly volumes, and neither price nor volume show a significant long-run trend during the three-year observed period.

3 Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In April 2019, consumption of fresh fisheries and aquaculture products increased in both volume and value in most of the surveyed Member States compared with April 2018, which could be mainly due to the Easter holiday happening in that period. The largest increases in volume occurred in Ireland and Hungary. Hungary also registered the highest increase in value (58%) followed by Germany (43%). Only in Spain and the UK, consumption decreased, by 1% and 4%, respectively.

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

Country	Per capita consumption 2016* (live weight equivalent) kg/capita/year	April 2017		April 2018		March 2019		April 2019		Change from April 2018 to April 2019	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	24,7	702	11,88	708	10,33	581	9,26	714	11,86	1%	15%
France	32,9	16.710	198,66	15.419	182,14	17.948	211,09	15.720	193,80	2%	6%
Germany	13,9	5.601	81,12	4.157	61,77	5.240	78,67	5.761	88,17	39%	43%
Hungary	5,2	416	1,94	215	1,37	266	1,62	422	2,17	96%	58%
Ireland	23,0	1.061	14,90	982	14,09	1.463	21,14	1.969	16,22	101%	15%
Italy	31,1	24.943	255,00	24.240	246,94	32.605	338,45	24.567	251,21	1%	2%
Netherlands	21,0	2.167	35,67	1.931	32,54	2.814	45,19	2.232	39,08	16%	20%
Poland	14,5	4.280	24,82	3.150	18,97	4.956	30,18	3.870	25,75	23%	36%
Portugal	57,0	4.351	28,88	3.710	24,53	5.289	34,52	4.259	27,94	15%	14%
Spain	45,7	51.099	381,08	49.578	371,16	52.134	396,52	48.835	379,51	1%	2%
Sweden	26,4	992	14,77	670	9,02	591	8,34	946	11,84	41%	31%
UK	23,7	4.365	64,69	4.142	62,66	3.701	59,58	3.989	63,42	4%	1%

Source: EUMOFA, based on Europanel (updated 21.06.2019).

*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

For the past three years, household consumption of fresh fisheries and aquaculture products in the month of April has been above the annual volume average in Denmark, Germany, Ireland, and Sweden. In the UK, April consumption equalled the annual average, while in the rest of the Member States, it was below annual levels.

In terms of value, consumption in April in recent years has been above the annual average in most of the Member States except Hungary, Poland, Portugal, and Spain.

The most recent weekly consumption data (up to week 29-2019) available in EUMOFA can be accessed [here](#).

The most recent monthly consumption data (May 2019) available in EUMOFA can be accessed [here](#).

3.2. Fresh salmon

Habitat: Highly migratory species, undertaking significant physiological changes during transitions of habitats from freshwater rivers to coastal waters, and back to freshwater rivers to spawn²⁰.

Catch area: North Atlantic on both the American and European side, distributed from Cape Cod and Portugal in south to Labrador and Russia in north. It is also found around the North Atlantic islands, e.g. in the UK, Iceland, Greenland and in the Baltic²¹.

Aquaculture production areas: Norway, the UK, Faroe Islands, Ireland, Iceland.

Production method: mostly farmed, but also caught. On the EU market can be found mostly farmed salmon.

Main producing countries of wild salmon in Europe: Norway, Iceland, the UK, Ireland.

Main consumers in the EU: France, the UK, Germany, Italy, Spain, Poland.

Presentation: Whole, fillets, steak.

Preservation: Fresh, frozen, hot and cold smoked, canned.



3.2.1 General overview of household consumption in Denmark, Germany, the Netherlands, and Sweden

In 2016, Denmark and Sweden were among the EU countries with per capita consumption of fish and seafood products above the EU average (24,3 kg). Sweden registered per capita consumption of 26,4 kg, 9% higher than the EU average and unchanged compared with the previous year. In Denmark, per capita consumption was 24,7 kg, 6% lower than in Sweden, but 2% higher than the EU average. It also increased by 3% compared with 2015.

As for the Netherlands, per capita consumption was 21,0 kg, 14% lower than the EU average. Compared with consumption in Portugal (57,0 kg per capita, the highest in the EU), it was 63% lower. In Germany, per capita consumption was 13,9 kg, 43% lower than the EU average. However, it registered a 2% increase compared with the previous year. See more on per capita consumption in the EU in table 3.

In these four Member States, retail prices and volumes of household purchases of fresh salmon fluctuated during January 2016–April 2019. In 2017 and 2018, prices significantly increased, which could be related to higher import prices of Atlantic salmon in the EU. The highest price increase among the surveyed countries in 2017 was in the Netherlands (23,65 EUR/kg), or 26% compared to 2016.

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

First sales: Denmark (5/2019), Poland (5/2019), Sweden (5/2019).

Extra-EU Import: United States (5/2019, 3/2018), Norway (5/2019).

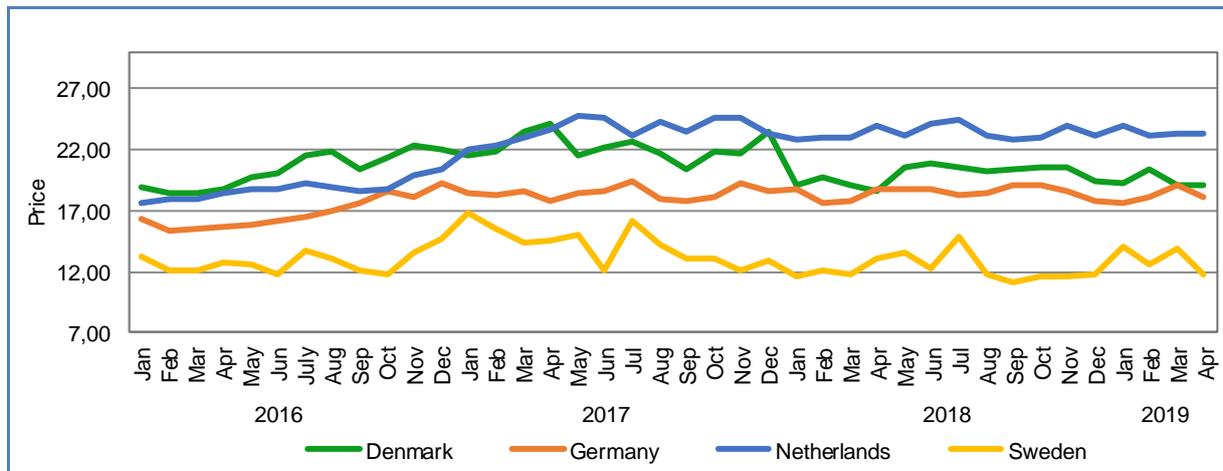
Topic of the month: Salmon in Europe (2/2018), Smoked salmon in France (1/2016), Farmed salmon in France (August–September 2013).

Consumption: Belgium (1/2014), Estonia (1/2014), Finland (1/2015, 1/2014), France (3/2016, 8/2015), Germany (3/2016), Italy (3/2016, 8/2015, 1/2014), Latvia (3/2016, 1/2015), Lithuania (3/2016, 1/2015), Netherlands (1/2014), Portugal (1/2014), Spain (8/2015, 1/2014), Sweden (1/2015, 1/2014), the UK (3/2016, 1/2014).

²⁰ <http://www.eumofa.eu/documents/20178/110994/MH+2+2018.pdf>

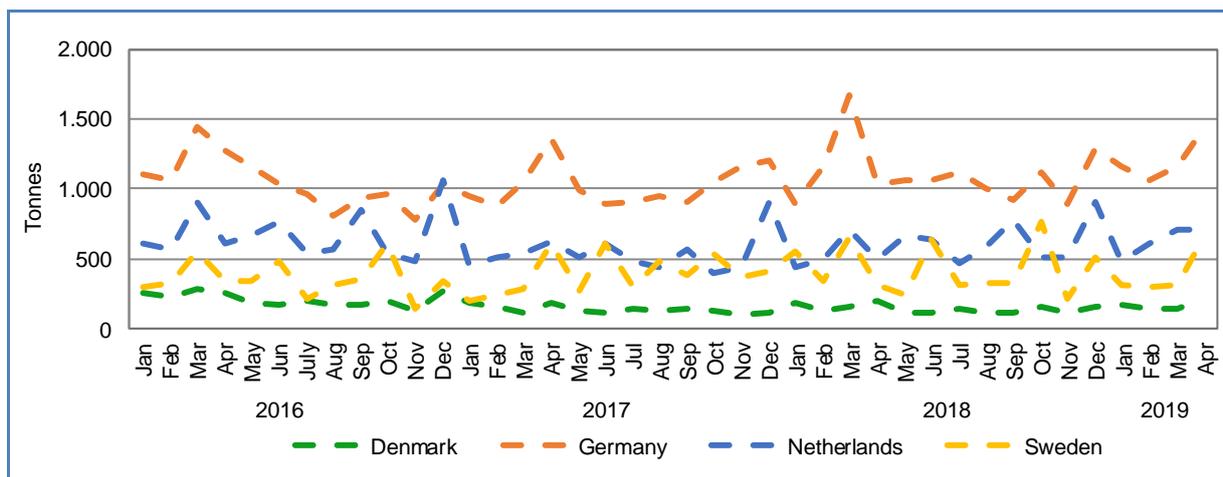
²¹ <http://www.eumofa.eu/documents/20178/110994/MH+2+2018.pdf>

Figure 41. RETAIL PRICES OF FRESH SALMON



Source: EUMOFA, based on Europanel (updated 21.06.2019).

Figure 42. HOUSEHOLD PURCHASES OF FRESH SALMON



Source: EUMOFA based on Europanel (updated 21.06.2019).

3.2.2 Consumption trend in Denmark

Long-term trend, January 2016–April 2019: decreasing in volume and slightly decreasing in price.

Yearly average price: 20,33 EUR/kg (2016), 22,21 EUR/kg (2017), 19,99 EUR/kg (2018).

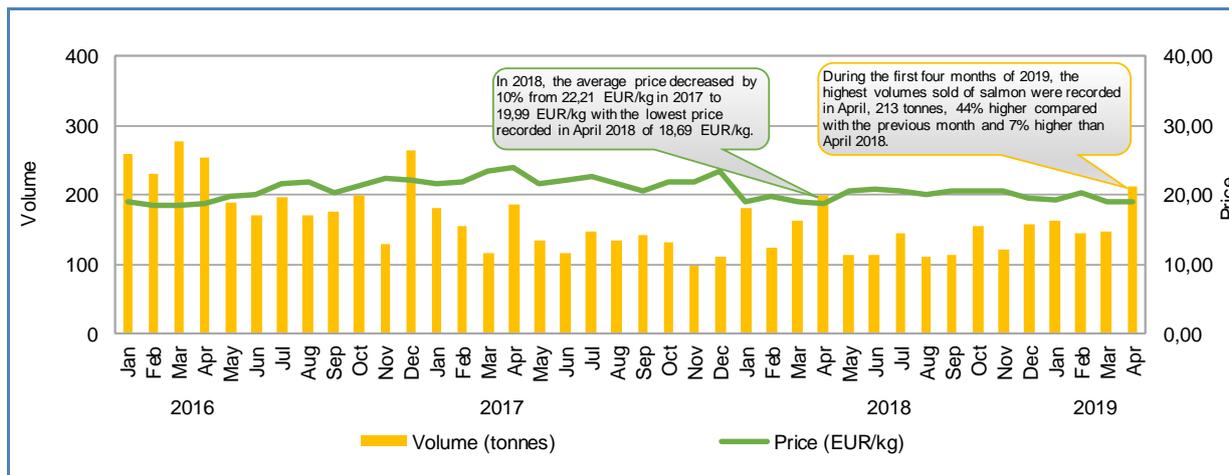
Yearly consumption: 2.513 tonnes (2016), 1.649 tonnes (2017), 1.690 tonnes (2018).

Short-term trend, January–April 2019: slightly increasing in volume and slightly decreasing in price.

Average price: 19,46 EUR/kg.

Consumption: 667 tonnes.

Figure 43. RETAIL PRICE AND VOLUME SOLD OF FRESH SALMON IN DENMARK



Source: EUMOFA, based on Europanel (updated 21.06.2019).

3.2.3 Consumption trend in Germany

Long-term trend, January 2016–April 2019: increasing in both volume and price.

Yearly average price: 16,83 EUR/kg (2016), 18,45 EUR/kg (2017), 18,49 EUR/kg (2018).

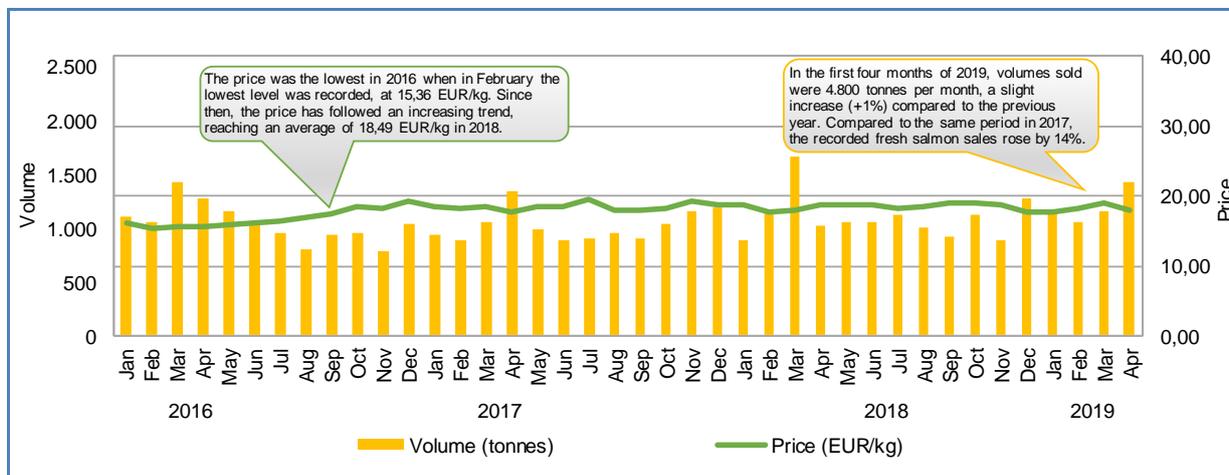
Yearly consumption: 12.548 tonnes (2016), 12.263 tonnes (2017), 13.232 tonnes (2018).

Short-term trend, January–April 2019: increasing in volume and slightly increasing in price.

Average price: 18,21 EUR/kg.

Consumption: 4.800 tonnes.

Figure 44. RETAIL PRICE AND VOLUME SOLD OF FRESH SALMON IN GERMANY



Source: EUMOFA, based on Europanel (updated 21.06.2019).

3.2.4 Consumption trend in the Netherlands

Long-term trend, January 2016–April 2019: decreasing in volume and increasing in price.

Yearly average price: 18,79 EUR/kg (2016), 23,65 EUR/kg (2017), 23,40 EUR/kg (2018).

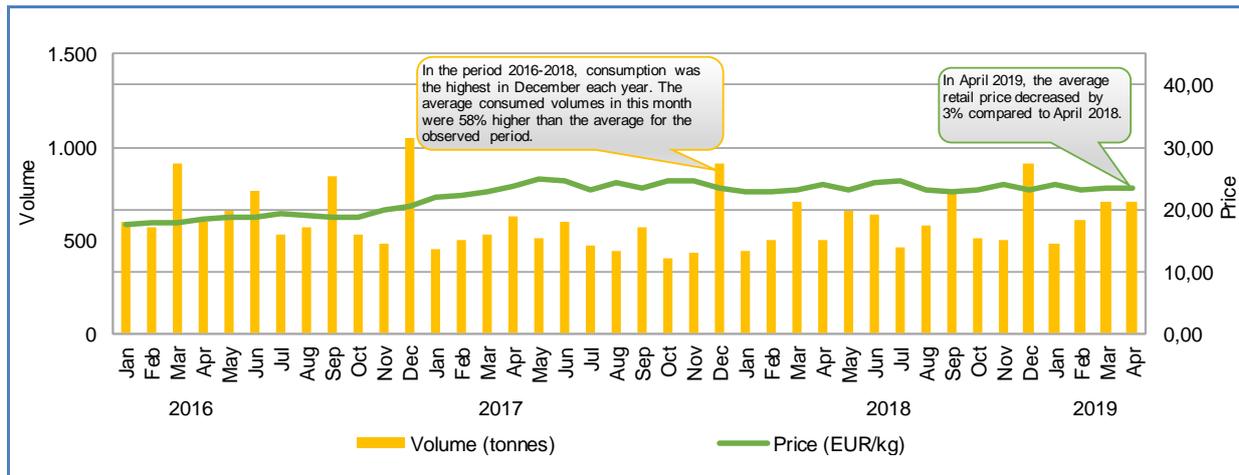
Yearly consumption: 8.131 tonnes (2016), 6.459 tonnes (2017), 7.195 tonnes (2018).

Short-term trend, January–April 2019: increasing in volume and decreasing in price.

Average price: 23,44 EUR/kg.

Consumption: 2.520 tonnes.

Figure 45. RETAIL PRICE AND VOLUME SOLD OF FRESH SALMON IN THE NETHERLANDS



Source: EUMOFA, based on Europanel (updated 21.06.2019).

3.2.5 Consumption trend in Sweden

Long-term trend, January 2016–April 2019: increasing in volume and decreasing in price.

Yearly average price: 12,83 EUR/kg (2016), 14,18 EUR/kg (2017), 12,28 EUR/kg (2018).

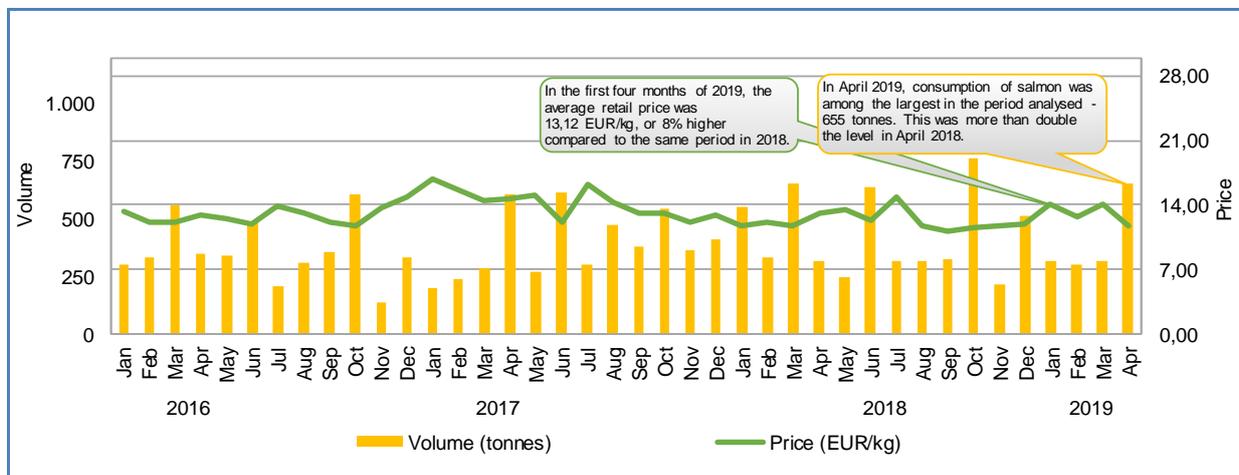
Yearly consumption: 4.310 tonnes (2016), 4.676 tonnes (2017), 5.180 tonnes (2018).

Short-term trend, January–April 2019: increasing in volume and decreasing slightly in price.

Average price: 13,12 EUR/kg.

Consumption: 1.589 tonnes.

Figure 46. RETAIL PRICE AND VOLUME SOLD OF FRESH SALMON IN SWEDEN



Source: EUMOFA, based on Europanel (updated 21.06.2019).

4 Case study – The Irish seafood sector

4.1 Introduction

Ireland is part of an island in the North Atlantic which belongs geographically to Western Europe. The island's governance is divided between Ireland and Northern Ireland (the United Kingdom). Ireland accounts for roughly five-sixths of the island or 70.280 km² with a coastline of 1.448 km²² and territorial seas of 12 nm and EEZ 200 nm. Approximately 4,85 million people live in Ireland today²³.

The country's long coastline close to some of the most productive fishing grounds in the EU gives Ireland a natural advantage in the development of the seafood industry. Consequently, the seafood industry plays a vital role in the economy and has shown growth over the past few years.



Source: World Factbook.

In 2017, the seafood industry contributed EUR 1,15 billion to the Irish economy, a 6,4% increase from 2016²⁴. The growth has mainly been driven by increased export values and increased aquaculture production²⁵.

In 2017, the total value of landings and aquaculture production increased by 12% to EUR 609 million relative to 2016. Volume size increased by a similar margin, growing by 11% to 361.000 tonnes²⁶ compared to 2016. The growth was linked to a 14% volume and a 35% value increase in aquaculture production. On the other hand, fisheries landing volume and value decreased by 1% and 27% respectively. Wild-caught fish constituted 66% in value (EUR 401 million) and 87% in volume (314.000 tonnes) of total fisheries and aquaculture production²⁷. Killybegs port recorded the highest value of landings, with 192.000 tonnes valued at EUR 125 million, with Castletownbere as number two with 30.500 tonnes, valued at EUR 108 million²⁸.

Of the 4,8 million citizens in Ireland, around 9.300 are directly employed in the seafood sector. Of these, 3.360 are employed in fisheries, 1.900 in aquaculture and close to 4.000 people in the processing industry²⁹.

²² https://webgate.ec.europa.eu/fpfis/cms/farnet2/on-the-ground/country-factsheets/irish-clld-programme_en#group-factsheet-content

²³ <https://www.worldometers.info/world-population/ireland-population/>

²⁴ BIM-Business-of-Seafood-2017.

²⁵ BIM-Business-of-Seafood-2017.

²⁶ BIM-Business-of-Seafood-2017.

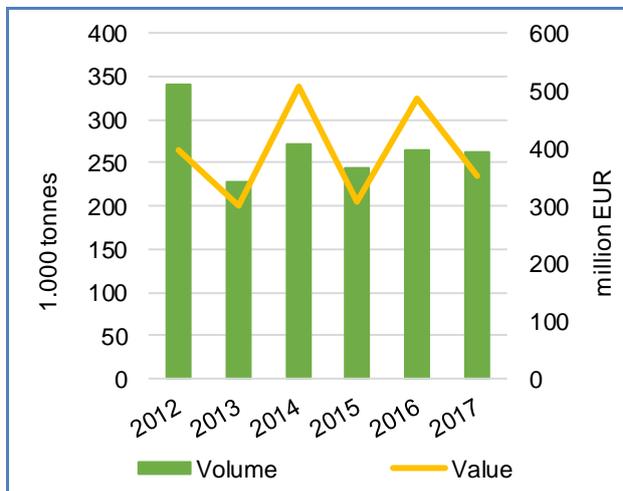
²⁷ BIM-Business-of-Seafood-2017.

²⁸ BIM-Business-of-Seafood-2017.

²⁹ BIM-Business-of-Seafood-2017.

4.2 Fisheries

Figure 47. **FISHERIES LANDINGS IN IRELAND (volume in 1000 tonnes, value in million EUR)**



Source: The Sea-Fisheries Protection Authority (SFPA).

Since 2012, fisheries landings in Ireland has varied between 229.000 tonnes (2013) and 341.000 tonnes (2012). The values of fisheries landings have fluctuated from EUR 299 million (2013) to EUR 508 million (2014). In 2013, Ireland's share of landed volumes was 96%. Since then the Irish share has decreased due to higher landings from UK and French vessels. In 2016, the Irish share of EU landings constituted 6% of total volumes and 7% of overall values³⁰.

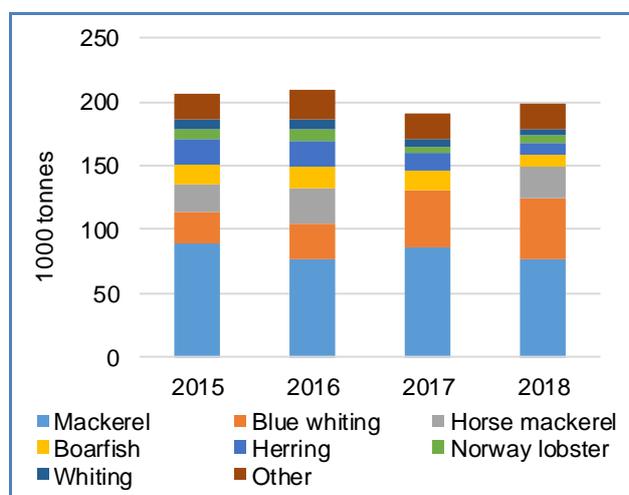
In 2017, landings in Ireland decreased compared with 2016, totalling to 264.000 tonnes (-1%) worth EUR 353 million (-27%).

The main reason behind the fall in landing value was overall fall unit values. The fall in unit values was caused by both higher landing volumes and landing share of low value species (blue whiting and boarfish) and drop in unit values for top landed species like blue whiting, horse mackerel and Atlantic herring.

Of all fish landed in Ireland, 68% or 179.000 tonnes were caught by Irish vessels, contributing to 52% of total value. The value of fisheries products landed by the national fleet halved compared with 2016, totalling EUR 184 million. The top-three landed species in terms of value by the Irish fleet were Atlantic mackerel, prawn and brown crab. Of the non-Irish landings, 29% of the value originated from the UK fleet and 8% from the French fleet.

³⁰ EUROSTAT, <http://appsso.eurostat.ec.europa.eu/nui/show.do>

Figure 48. **MAIN SPECIES CAUGHT BY IRISH VESSELS (volume in 1000 tonnes)**



Source: <https://www.gov.uk/government>.

Atlantic mackerel is the most important fish species for the Irish fleet both in terms of volume and value. Over the past four years catches have varied between 76.000 tonnes to nearly 90.000 tonnes annually. Blue whiting catches increased every year since 2015 and reached nearly 48.000 tonnes in 2018.

In 2018, the top three species in terms of volume Atlantic mackerel, blue whiting and horse mackerel constituted 75% of the total volumes landed by the Irish fleet³¹.

Table 4. **LANDINGS OF FISHERIES PRODUCTS IN IRELAND BY VESSEL STATE (volume in 1000 tonnes, value in EUR million)**

Landing nation	2012		2013		2014		2015		2016		2017e ³²	
	Volume	Value	Volume	Value								
Ireland	234	299	221	283	242	444	205	214	196	370	179	184
United Kingdom	20	23	4	10	7	12	13	16	21	27	51	102
France	11	27	1	1	8	27	14	47	19	50	14	28
Spain	6	14	1	2	7	21	8	28	12	31	11	21
Denmark	0	0	0	0	0	0	0	0	11	6	9	17
Germany	0	0	0	0	0	0	0	0	0	1	0	0
Other	69	33	3	2	7	4	4	3	7	2	0	0
Total	341	397	229	299	271	508	244	309	265	486	264	353

Source: EUROSTAT.

4.3 Aquaculture

Finfish (salmon and trout) and shellfish (mussels and oysters) dominate Irish aquaculture production. Ireland is the largest producer of organic farmed salmon in the EU and the sector provides around 1.900 full and part-time jobs and consists of 284 production units (2017)³³.

In 2010, Irish aquaculture production reached nearly 46.200 tonnes mainly due to the production volumes of salmon and mussels. Production volumes decreased in the following years and ended at their lowest in 2014 (29 327 tonnes). Volumes and values have showed a growth every year since 2014.

In 2016, Irish aquaculture production increased by 10% in terms of volume to 41.279 tonnes and 13% in terms of value to EUR 154 million. The main driver was volume and value growth in the salmon and oyster industry.

³¹ <https://www.gov.uk/government>.

³² EUROSTAT, national estimates.

³³ BIM-Business-of-Seafood-2017.

Production of salmon increased by 24% to 16.300 tonnes constituting 39% of total volume and value increased by 16% to EUR 104 million constituting 68% of total aquaculture value. Oyster production ended right above 8 000 tonnes in 2016 at a value of EUR 35 million. This represents increases volume and value of 7% and 15%, respectively, from 2015.

Table 5. **AQUACULTURE PRODUCTION IN IRELAND (volume in tonnes, value in EUR million)**

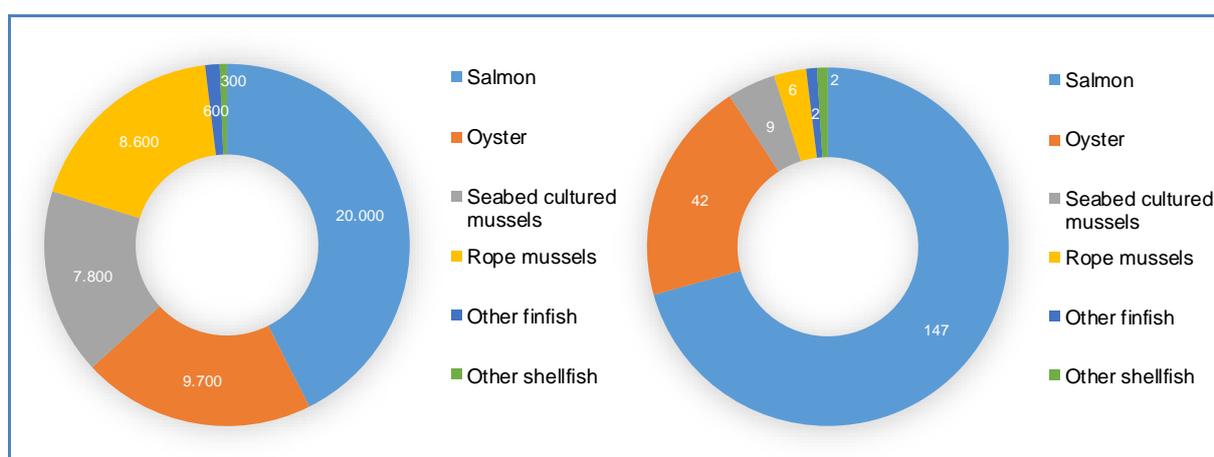
Main commercial species	2010		2011		2012		2013		2014		2015		2016	
	Volume	Value												
Salmon	15.691	71	12.196	73	12.440	76	9.125	56	9.368	58	13.116	90	16.300	104
Oyster	7.162	21	7.937	30	7.560	37	8.640	40	7.569	35	7.478	31	8.016	35
Mussel	21.934	16	0	0	15.228	11	15.361	15	11.374	10	16.015	13	16.156	12
Trout	1.102	4	1.201	4	781	2	908	3	808	3	803	2	705	2
Scallop	59	0	50	0	43	0	37	0	26	0	50	0	33	0
Other freshwater fish	24	0	16	0	10	0	80	1	78	1	45	0	15	0
Other molluscs and aquatic invertebrates	0	0	0	0	0	0	3	0	4	0	4	0	4	0
Other	217	1	22.890	18	80	1	83	0	100	0	70	0	50	0
Total	46.189	113	44.290	125	36.142	127	34.237	114	29.327	106	37.581	136	41.279	154

Source: EUMOFA.

In 2017, the aquaculture industry produced approximately 47.000 tonnes of seafood (a 14% increase from 2016). Value reached EUR 208 million, a 35% increase from 2016³⁴. Like 2016, the fastest growing elements of the sector, both in terms of volume and value, were the oyster and salmon farms. Low prices on the global market negatively affected the farmed rope mussel industry, resulting in a 13% loss in harvest volume and a 18% decrease in value³⁵.

In 2017, the volume of farmed salmon increased by 23% and the value climbed by 41% relative to 2016. The increase in value was driven by strong demand for organic and non-organic salmon, and stability of volumes produced in Europe since 2015. In Ireland, the volumes of farmed salmon constituted 42% of total aquaculture production in 2017 while the value accounted for 71%. When it comes to oyster, volumes increased by 21% and values by 19% over 2016; this species' production constituted 21% of total volumes and 20% of the value of the aquaculture sector.

Figure 49. **AQUACULTURE PRODUCTION IN 2017 BY VOLUME (LEFT) AND VALUE (RIGHT) (volume in tonnes and value in EUR million)**



Source: Ireland's Seafood Development Agency.

³⁴ Ireland's Seafood Development Agency.

³⁵ <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf>

4.4 Processing industry

There were close to 4.000 people employed in the Irish seafood processing industry in 2017. The number of companies grew to 163, 4% higher than in 2016. About 32% of these companies generated a turnover between EUR 1 million and EUR 10 million per year, while 15% generated a turnover larger than EUR 10 million per year and 53% has a turnover less than EUR 1 million per year. Of the 163 companies registered there were 72 in the whitefish industry, 42 in the shellfish industry, 34 in the salmon industry and 15 pelagic companies³⁶.

4.5 Import

From 2013 to 2018 Irish imports of seafood increased by 98% in volume and 43% in terms of value. Both import volumes and values increased every year except for 2016 when volumes and values fell by 8% and 2%, respectively, compared with 2015.

In 2018, total imports of fisheries and aquaculture products to Ireland amounted to 196.000 tonnes with a value of EUR 352 million. The size of total exports in 2018 represents a 20% increase in volume and a 1% increase in value over 2017. The largest supplier is the UK, whose exports to Ireland amounted to 73 000 tonnes (+12% over 2017) with a value of EUR 227 million (-3%). This constituted 38% of the total import volumes and 68% of the total values in 2018.

The most valued species imported was salmon which was worth EUR 71 million and constituted 20% of total value, but only 5% of the volumes. Imports of salmon decreased by 6% in volume and increased by 7% in value from 2017. A large share of the salmon imports is purchased by the processing industry and refined into fillets and smoked products.

In 2018, close to 60% of the volumes of salmon imported to Ireland was from the UK. This mostly comprised fresh whole salmon, totalling 6 400 tonnes and accounting for 69% of all salmon imported from the UK. Its price in 2018 was 6,50 EUR/kg, declining by 3% from 2017.

Non-food use products (other than fishmeal and fish oil) constituted 53% of total imports in terms of volume, which is an increase of 50% compared to 2017. These products values increased by 62% but constituted only 6% of the total market. Products of this nature mainly includes fish waste and algae unfit for human consumption. These raw materials were mainly imported from Norway and Iceland.

³⁶ BIM-Business-of-Seafood-2017.

Table 6. **IMPORT OF FISHERIES AND AQUACULTURE PRODUCTS TO IRELAND BY MAIN COMMERCIAL SPECIES (volume in 1000 tonnes, value in EUR million)**

Main commercial species	2013		2014		2015		2016		2017		2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Salmon	6	44	7	51	9	65	9	63	10	67	9	71
Other products ³⁷	12	32	14	35	12	35	10	30	11	36	10	37
Cod	3	16	4	20	4	22	5	25	8	39	5	29
Other marine fish ³⁸	5	22	5	24	6	25	5	22	4	20	8	26
Other non-food use ³⁹	29	6	45	9	57	12	52	11	69	12	104	20
Shrimp, miscellaneous	2	12	2	16	2	18	2	19	2	19	2	18
Tuna, skipjack	0	0	0	0	4	22	7	21	5	21	3	16
Herring	2	5	2	11	2	11	3	12	8	13	4	15
Shrimp, warmwater	1	5	1	6	1	6	1	7	1	8	1	9
Other	39	103	33	112	33	98	28	100	45	112	49	112
Total	99	246	114	283	131	314	121	308	163	347	196	352

Source: EUMOFA.

Table 7. **IMPORT OF FISHERIES AND AQUACULTURE PRODUCTS TO IRELAND BY COUNTRY OF ORIGIN (volume in 1000 tonnes, value in EUR million)**

Supplier	2013		2014		2015		2016		2017		2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
United Kingdom	40	156	45	184	46	203	48	200	66	235	73	227
Denmark	3	7	7	11	10	18	5	12	14	18	11	23
Germany	3	16	3	17	2	16	3	18	3	19	3	19
France	2	15	2	14	3	16	3	18	3	16	2	17
Iceland	31	6	31	7	46	8	45	9	52	10	57	10
Belgium	0	2	0	2	0	2	0	2	0	2	1	10
Norway	7	2	11	2	11	5	5	2	16	3	40	9
Netherlands	2	12	2	14	2	11	2	11	2	9	1	9
Spain	0	2	0	2	2	5	1	5	1	6	1	4
Other	11	28	12	29	8	31	9	33	6	29	6	25
Total	99	246	114	283	131	314	121	308	163	347	196	352

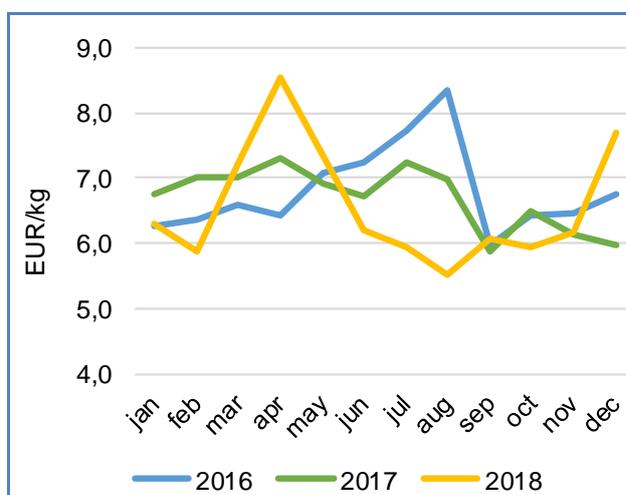
Source: EUMOFA.

³⁷ Soups, broths and other food preparations.

³⁸ Other fish and fish fillets, prepared, preserved, coated with batter or breadcrumbs, whether or not pre-fried in oil.

³⁹ Mainly fish waste seaweeds and other algae unfit for human consumption.

Figure 50. IRISH IMPORT PRICE OF FRESH WHOLE SALMON



Source: EUMOFA.

4.6 Export

Ireland is a net exporter of fisheries and aquaculture products. From 2013 to 2018 Irish seafood exports increased by 7% in volume and 25% in value. Exports of the highest valued species, salmon, rose by 65% in volume and 99% in value during this period. The second largest species in terms of value, the Atlantic mackerel, increased 18% in both volume and value from 2013. Exports to the three main destination markets France, the UK and Spain, increased 23%, 8% and 38%, respectively, in terms of value during this period.

France is the main country of destination in value terms for exports, accounting for 22% of the value of all exports in 2018. Exports to France decreased by 17% in volume and 16% in value from 2017. The UK and Spain are the other top export partners both accounting for more than 10% each of total export value in 2018.

In 2018, exports amounted to 325.000 tonnes which were valued at EUR 658 million. This was a decrease in both volume (-1%) and value (-5%) compared to 2017. The top-three species in terms of value exported by Ireland were salmon, mackerel and crab. Combined, these products composed 34% of total export value in 2018, which is a 4% decrease of share of total export value from 2017. For salmon specifically, Irish exports decreased in both volume and value terms by 34% and 30%, respectively.

Table 8. EXPORT OF FISHERIES AND AQUACULTURE PRODUCTS FROM IRELAND BY DESTINATION COUNTRY (volume in 1000 tonnes, value in EUR million)

Country of destination	2013		2014		2015		2016		2017		2018	
	Volume	Value										
France	29	119	34	127	33	135	37	150	45	175	38	147
United Kingdom	45	83	45	81	47	87	50	95	50	92	55	89
Spain	13	54	16	62	17	72	18	80	18	78	18	75
Italy	5	28	4	30	5	35	6	46	7	46	8	59
China	7	13	10	18	8	19	9	25	10	28	13	46
Nigeria	52	40	57	53	66	71	26	33	46	32	44	28
Netherlands	14	19	11	14	14	16	16	17	20	26	20	23
Germany	10	24	10	24	9	24	8	25	7	25	7	20
Japan	3	5	5	6	6	7	8	11	12	16	12	16
Other	124	142	119	148	112	148	90	128	114	172	111	153
Total	303	527	312	562	317	614	269	609	327	689	325	658

Source: EUMOFA.

Table 9. EXPORT OF FISHERIES AND AQUACULTURE PRODUCTS FROM IRELAND BY MAIN COMMERCIAL SPECIES (volume in 1000 tonnes, value in EUR million)

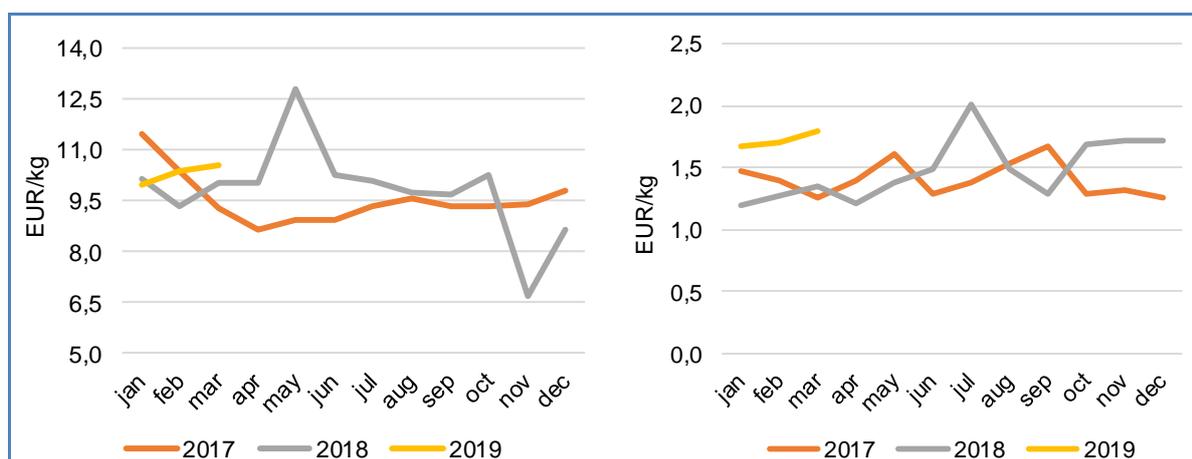
Main commercial species	2013		2014		2015		2016		2017		2018	
	Volume	Value										
Salmon	5	42	6	47	9	75	8	71	12	118	8	83
Mackerel	48	70	77	111	69	90	65	87	67	93	57	82
Crab	8	34	9	36	9	39	10	43	9	47	9	61
Norway lobster	4	32	5	41	5	48	6	61	5	45	5	56
Oyster	5	27	6	26	6	26	7	34	8	38	7	42
Horse mackerel	46	54	41	45	40	50	29	32	34	35	36	40
Other non-food use ⁴⁰	38	16	42	17	50	21	48	23	66	40	78	37
Other molluscs and aquatic invertebrates	3	17	2	18	2	25	3	30	3	24	4	29
Fishmeal	13	17	12	15	14	20	14	21	15	19	20	28
Other	133	218	112	205	113	220	78	207	108	228	101	199
Total	303	527	312	562	317	614	269	609	327	689	325	658

Source: EUMOFA.

Salmon and mackerel are the two most valued species exported by Ireland, however, they differ strongly in terms of volume, which is reflected in their export price. For fresh salmon, the export price reached 9,75 EUR/kg in 2018, increasing by 5% from 2017. Irish salmon is produced and exported under the brand “organic salmon” which achieves a higher price than non-organic salmon. This explains the price discrepancy between salmon imported from the UK (Scotland) to Ireland and salmon exported from Ireland.

Export price of mackerel averaged at 1,41 EUR/kg in 2018, increasing by 4% over 2017. During the first three months of 2019, there was a 22% increase in the export price compared to its 2018 average.

Figure 51. EXPORT PRICE OF FRESH SALMON (LEFT) AND MACKEREL (RIGHT) FROM IRELAND



Source: EUMOFA.

⁴⁰ Seaweeds and other algae fresh, chilled, frozen or dried, whether or not ground, other.

4.7 Consumption

Apparent consumption of fisheries and aquaculture products in Ireland amounted to 23 kg per capita in 2016, 5 % higher than in 2015⁴¹. The main consumed species are salmon, cod, shrimp, haddock and hake⁴².

From 2012 to 2018, Irish fresh seafood consumption increased by 25% in volume and 42% in terms of value. This was mainly driven by an increase in salmon and cod consumption. In 2018, Irish consumption and retail sales of fresh fish were around 42.000 tonnes valued at EUR 644 million, a 4% increase in volume and a 6% increase in value over 2017. Salmon and cod were the main species accounting for 76% of the value and 71% of the volume.

Table 10. IRISH FRESH SEAFOOD CONSUMPTION (volume in 1000 tonnes, value in EUR million)

Specie	2012		2013		2014		2015		2016		2017		2018	
	Volum e	Valu e												
Salmon	17	257	15	253	17	293	22	350	22	391	20	360	23	403
Cod	5	58	6	69	7	77	7	82	7	87	7	86	7	90
Shrimp, miscellaneous	2	29	2	43	2	43	2	40	2	41	3	48	2	45
Hake	1	16	2	22	3	28	3	28	3	39	4	44	4	41
Haddock	2	24	3	28	2	22	2	20	2	24	2	25	2	24
Saithe	4	45	2	20	2	21	2	24	2	22	2	24	2	22
Mackerel	2	26	3	26	3	26	3	28	3	24	2	22	2	21
Totals	34	453	33	460	36	510	40	571	42	629	41	608	42	644

Source: EUMOFA.

⁴¹ The EU fish market, 2018 Edition, EUMOFA.

⁴² <http://www.eumofa.eu/en/ireland>

5 Case study – The EU canned tuna industry

5.1 Introduction

Tuna (mostly canned) has been for years the most consumed species in the EU, ahead of cod and salmon. In 2016, its apparent consumption amounted to 2,78 kg per capita (live weight equivalent), representing 11,4% of total consumption of fisheries and aquaculture products⁴³.

With an average annual production of more than 350.000 tonnes, the EU canned tuna industry supplies 46% of the EU market, with Spain, Italy, Portugal and France as main producers.

It provides 20.140 direct jobs in the EU and 60.660 indirect jobs in the supporting sectors⁴⁴.

The European tuna sector is vertically integrated, bringing together fishing companies, canners and distributors.



The European tuna industry is an important socio-economic activity. It consists of two major sectors: the EU tuna fishing fleet, which counts 30 Spanish and 22 French purse seiners, and the processing and canning sector. Both sectors are complementary and interdependent.

5.2 Production

5.2.1 Evolution

Table 11. **EU CANNED TUNA PRODUCTION (volume in 1000 tonnes product weight)**

EU Member State	2012	2013	2014	2015	2016	2017
Spain	239	235	237	238	239	241
Italy	66	64	64	74	82	84
Portugal	18	21	21	20	24	23
France	18	18	20	20	20	21
Other	4	4	4	4	4	5
Total	345	342	346	356	369	374

Source: ANFACO for Spain, Eurostat/Prodcom for other Member States.

The EU produced 374.000 tonnes of canned tuna in 2017. Spain is by far the leading producer, accounting for 64% of total EU production, followed by Italy (22%), Portugal (6%), and France (6%).

EU production has increased slightly in the last few years, especially since 2014 (+8% over the period 2014–2017), mainly driven by the upward trend seen in Italy (+31%) and Portugal (+10%).

5.2.2 Structure

The leading processing companies are vertically integrated, involved simultaneously in fishing, processing and sale; they have processing plants both in the EU and in third countries.

JEALSA-RIANXEIRA, Spanish-owned company, produced 125.000 tonnes of canned fish in 2018, including more than 100.000 tonnes of canned tuna, and has tuna canning plants in Spain (Galicia), Guatemala and Brazil. JEALSA-RIANXEIRA has two tuna fishing vessels which target tropical tunas in the East-Central and South-East Atlantic. JEALSA-RIANXEIRA exports 34% of its production outside of Spain and has a market share of 40% of the Spanish retail market.

⁴³ The EU fish market, 2018 edition (EUMOFA).

⁴⁴ European Tropical Tuna Fishing and Processing Committee (Eurothon).

CALVO is another Spanish-owned vertically integrated group. It is a leading company in Spain for canned fish and the second largest canned tuna brand in Italy. Also headquartered in Galicia, CALVO produced 110.000 tonnes of canned fish in 2018, mostly tuna, and has canning plants in Spain, El Salvador and Brazil. About 63% of the tuna processed by CALVO is supplied by CALVO's own fleet, which counts seven tuna purse seiners fishing in equatorial waters of the Eastern Pacific Ocean and in the Atlantic Ocean.

BOLTON FOODS, an Italy-based subsidiary of Dutch conglomerate BOLTON Group, owns some of Europe's biggest tuna brands, including SAUPIQUET, RIO MARE and PALMERA. Bolton, which is involved in tuna fishing through the fleet of its French subsidiary SAUPIQUET, also holds 40% of CALVO's capital since 2012. BOLTON has leading positions in the canned tuna market in Italy, France and Greece.

5.2.3 Supply to the industry

In the last 15 years, the EU canned tuna industry has imported more and more precooked frozen tuna loins and less frozen whole tunas. This partial switch has maintained the activity of many processing plants in the EU, which otherwise would have faced difficulties competing with factories located near the fishing areas.

In 2018, 77% of the tuna imported in the EU for canning purposes (in live equivalent weight) consisted of tuna loins compared to 72 % in 2015 and 65% in 2005.

Table 12. EU IMPORTS OF TUNA FOR CANNING (volume in 1000 tonnes)

Type of raw material	2015		2016		2017		2018	
	PW	LWE	PW	LWE	PW	LWE	PW	LWE
Fresh whole tunas	4.372	4.372	5.095	5.095	6.673	6.673	6.812	6.812
Frozen whole tunas	112.124	112.124	108.696	108.696	125.872	125.872	95.159	95.159
Frozen tuna loins	118.861	297.153	117.712	294.280	133.785	334.463	138.465	346.163
Total	235.357	413.649	231.503	408.071	266.330	467.008	240.436	448.134
%tuna loins/total		71,8%		72,1%		71,6%		77,2%

PW : product weight; LWE : live weight equivalent.

Source: EUROSTAT/COMEXT for PW data, EUMOFA elaboration for LWE data.

In 2018, the major suppliers of frozen whole tunas to the EU industry were Cape Verde (8.322 tonnes), Seychelles (8.158 tonnes), Philippines (7.021 tonnes), and Vietnam (3.552 tonnes) in addition to the two Member States, Spain (22.816 tonnes) and France (11.637 tonnes).

The main suppliers of tuna loins were Ecuador (36.437 tonnes – in product weight), China (19.257 tonnes), Papua New Guinea (14.746 tonnes), Philippines (10.384 tonnes), Solomon Islands (8.106 tonnes), Mauritius (7.931 tonnes), and Indonesia (7.740 tonnes).

5.3 Export

The canned tuna exported by EU Member States goes mainly to other Member States (90% of total volumes exported in 2018). Africa absorbs 5,4% of the total (half of which by Ceuta and Melilla⁴⁵).

⁴⁵ Ceuta and Melilla are not part of the customs territory of the Union (Regulation (EU) N°952/2013 – Article 4(1)).

Table 13. **EU EXPORTS OF CANNED TUNA (volume in 1000 tonnes, value in million EUR)**

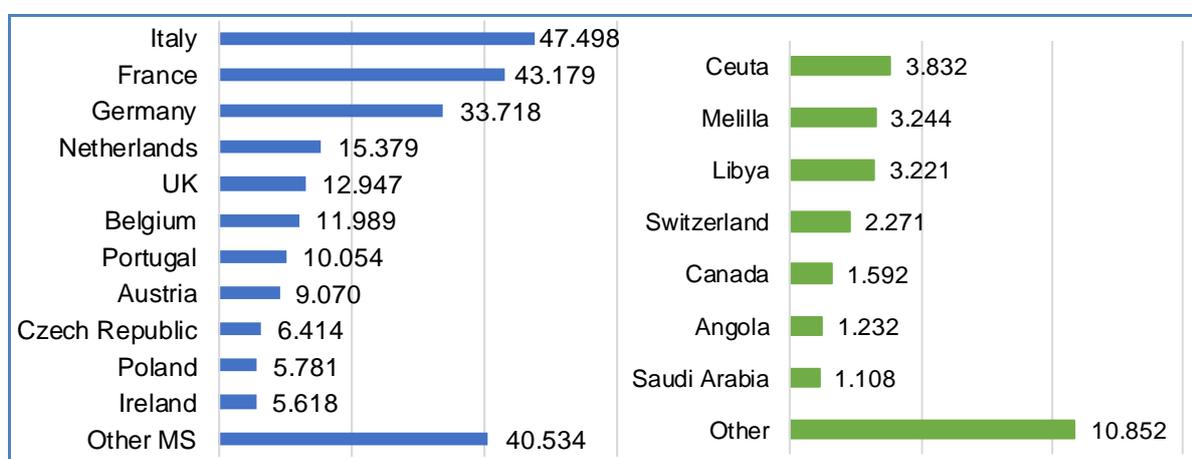
	2015		2016		2017		2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Intra-EU	188	828	194	911	226	1.114	242	1.223
Extra-EU	26	128	28	141	26	148	27	156
Total	214	956	222	1.052	252	1.262	269	1.379

Source: EUROSTAT/COMEXT.

The main destination markets within the EU are Italy, France and Germany, which together account for 51% by volume of EU's intra-EU exports.

Extra-EU exports are limited. The main destinations are Ceuta and Melilla, Spain's enclaves in North Africa (26% of total extra-EU exported volume), followed by Libya (12%) and Switzerland (8%).

Figure 52. **DESTINATION COUNTRIES OF INTRA-EU EXPORTS (LEFT) AND EXTRA-EU EXPORTS (RIGHT) OF CANNED TUNA (volume in tonnes)**



Source: EUROSTAT/COMEXT.

5.4 Import

In 2018, EU imports of canned tuna were close to EUR 3 billion for 639.000 tonnes. About 38% of the volume originated in the EU Members States and 62% were imported from third countries.

Table 14. **EU IMPORTS OF CANNED TUNA (volume in 1000 tonnes, value in million EUR)**

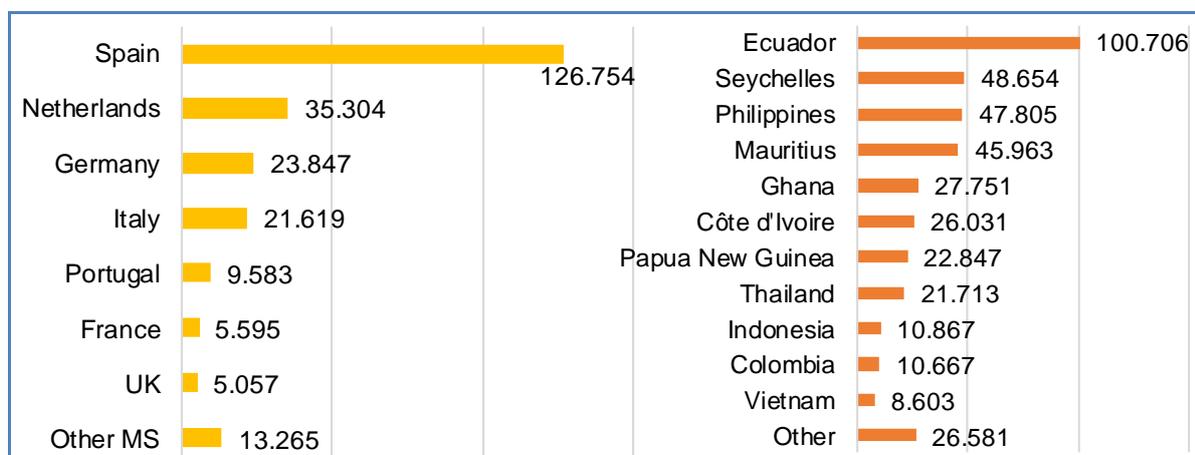
	2015		2016		2017		2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Intra-EU	199	936	201	962	222	1.116	241	1.273
Extra-EU	394	1.501	386	1.399	404	1.648	398	1.703
Total	593	2.437	587	2.361	626	2.764	639	2.976

Source: EUROSTAT/COMEXT.

Intra-EU imports are mostly covered by Spain, which provides 53% of the volumes of canned tuna of EU origin. Spain was followed by two non-producer Member States, the Netherlands and Germany, which have a significant trade activity and re-export important quantities of canned tuna (nearly 60.000 tonnes combined), covering one quarter of intra-EU imports.

The main extra-EU imports of canned tuna come from Ecuador, accounting for 25% of the total volume, followed by Seychelles, Philippines and Mauritius, which altogether supply 36% of extra-EU imports.

Figure 53. **COUNTRIES OF ORIGIN OF INTRA-EU IMPORTS (LEFT) AND EXTRA-EU IMPORTS (RIGHT) OF CANNED TUNA (volume in tonnes)**



Source: EUROSTAT/COMEXT.

5.5 Organisation of the sector

The interests of the EU canned tuna sector are represented by an interprofessional association, established in 2004, the European Tropical Tuna Fishing and Processing Committee, known as Eurothon.

This association brings together under one umbrella all tropical tuna European fleets and tuna processors.

Eurothon members include the three European Producer Organisations (Pos) involved in tropical tuna fishing⁴⁶ as well as the four national sector associations of the MS involved in tropical tuna canning⁴⁷. They are active in Europe, Africa (ACP⁴⁸-Africa) and Latin America. Their fishing activities take place in the Atlantic, Indian and Pacific Oceans.

The mission of Eurothon is *“to support the sustainable development and understanding of the European tropical tuna sector in a complex world where international interactions are crucial”*⁴⁹.

Eurothon is not an interbranch organisation (IBO) in the meaning of the CMO regulation.

It should also be mentioned that standards governing the marketing of preserved tuna in the EU are defined in the Council Regulation (EEC) n°1536/92⁵⁰.

5.6 Strategy of the EU canned tuna industry

In the last years, the tuna industry has experienced major developments, particularly in terms of sustainability, traceability, research-development and communication, which form the basis of the EU canned tuna industry's strategy.

According to the EU industry⁵¹, the strategic lines of the EU canned tuna sector in the coming years should be:

- R&D&I (research and development and innovation), which is a key tool for maximizing competitiveness and productive efficiency, guaranteeing food safety, traceability and sustainability throughout the supply chain, achieving the positioning of the canned category as a modern category, promoting business growth, and improving the range of products to align with new consumption habits and food trends;

⁴⁶ The French ORTHONGEL and the two Spanish ANABAC and OPAGAC.

⁴⁷ The Italian ANCIT, the Spanish ANFACO, the Portuguese ANICP and the French FIAC/ADEPALE.

⁴⁸ African, Caribbean and Pacific Group of States.

⁴⁹ <http://eurothon.eu/>

⁵⁰ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:31992R1536&from=EN>

⁵¹ The EU tuna industry and market, Juan M. Vieites (ANFACO), 15th Infofish World Tuna Trade Conference, Bangkok, 29 May 2018.

The tuna sector should increase its competitiveness through innovation in both product innovation (working on health/wellness, sustainable/ethic, specialty food, and packaging) and process innovation;

- Sustainability, which includes both environmental sustainability (codes of good practices, policies of sustainability, sustainable sourcing) and social sustainability (human and labour rights, corporate social responsibility);
- Food safety and traceability, through scrupulous compliance with EU hygienic-sanitary and food security requirements as well as implementation of quality management systems and retailers' certifications such as BRC⁵² and IFS⁵³ protocols;
- Internationalisation, which will continue to be a strategic pillar, both downstream (commercialisation of products) and upstream (assurance of raw materials);
- Communication and promotion, to improve the image of tuna and canned tuna, and build trust;
- Level playing field, which should be better guaranteed through effective monitoring and control mechanisms.

⁵² *British Retail Consortium*, https://www.ifsqn.com/what_is_brc_certification_.html

⁵³ *International Food Standard* <https://www.ifs-certification.com/index.php/en/standards>

6 Global highlights

Fisheries / Mediterranean / EU: On 11-12 June 2019 in Marrakech, Morocco, during a high-level conference of the General Fisheries Commission for the Mediterranean (GFCM), countries confirmed their commitments to reinforce efforts in key priorities: protecting marine resources, combating Illegal, Unreported and Unregulated (IUU) fishing, and strengthening the viability of coastal communities through the support to the small-scale fisheries prevailing in the region. In addition, commitments were renewed to ensure decent working conditions and social protection of fishers, make fisheries more attractive to the young generation and give equal recognition of the work of women, as well as building sustainable aquaculture and strengthening the value chain⁵⁴.



EU / Fisheries / Sustainability: The EU continues to make progress in achieving sustainable fisheries. More stocks in the North-West Atlantic and adjacent areas are being fished sustainably. The biomass in these areas is 36% higher now than in 2003. The economic performance of the EU fleet has improved, registering record-high net profits of EUR 1,3 billion in 2017. Wages have increased by 2,7% annually, on average. Evidence shows that fleets exploiting healthy stocks have positive economic results. This is the case of fleets targeting haddock, megrim, and plaice in the Irish Sea; herring, Northern hake, and sole in the Eastern and Western English Channel; and anglerfish in the Bay of Biscay⁵⁵.

EU / Guinea Bissau / Fisheries: The European Union (EU) and Guinea Bissau have signed a new fisheries protocol. The new protocol, which will last for five years, maintains fishing opportunities for trawlers targeting fish and cephalopods, shrimp trawlers, pole-and-line tuna vessels, tuna seiners and longliners. The annual financial contribution of the agreement will be EUR 11,6 million for access to resources, in addition to EUR 4 million for sector support⁵⁶.

UK / Conservation / Fisheries: On 31 May 2019, the UK Government announced the designations of 41 new marine conservation zones. An area nearly twice the size of England will become a “blue belt” of protected waters as a result of these new designations. At the moment, trawls and dredges are banned in only 5% of the area of UK marine protected areas⁵⁷.

Pacific / EU Market Access: On 28 May 2019, a three-week Regional Fish Inspectors Course to train competent authorities and fishing industry officials in the region to attain European Union (EU) certification for tuna fish products export to the EU market was held in Suva, Fiji. The training was provided by the Forum Fisheries Agency (FFA) as part of the five-year Pacific European Union Marine Partnership (PEUMP) Programme funded by the European Union. The interactive training course covered the tasks and duties of a Competent Authority officers and looked into fish processing, the food safety aspects, hygiene practices, as well as the understanding of key legislation and requirements to access key overseas markets such as the EU, China and the United States⁵⁸.

Iceland / Supply: The catch of the Icelandic vessels in May 2019 was 122.166 tonnes, a 13% decrease from May 2018. The demersal catch was 48.000 tonnes in May, or 7% more than in May 2018. The flatfish catch decreased by 11%, shellfish by 29%, and pelagic species decreased by 23% compared to same period in 2018⁵⁹.

⁵⁴ https://ec.europa.eu/fisheries/press/gfcm-high-level-conference-medfish4ever-initiatives-advances-and-renewed-commitments-11-12_en

⁵⁵ https://ec.europa.eu/fisheries/press/sustainable-fisheries-commission-presents-progress-made-and-opportunities-2020_en

⁵⁶ <https://fis.com/fis/worldnews/worldnews.asp?monthyear=&day=17&id=103279&l=e&country=0&special=&ndb=1&df=0>

⁵⁷ <https://www.blumarinefoundation.com/2019/05/31/uk-government-announces-41-new-marine-conservation-zones/>

⁵⁸ <https://www.ffa.int/node/2265>

⁵⁹ <https://www.statice.is/publications/news-archive/fisheries/fish-catch-in-may-2019/>

7 Macroeconomic Context

7.1 Marine fuel

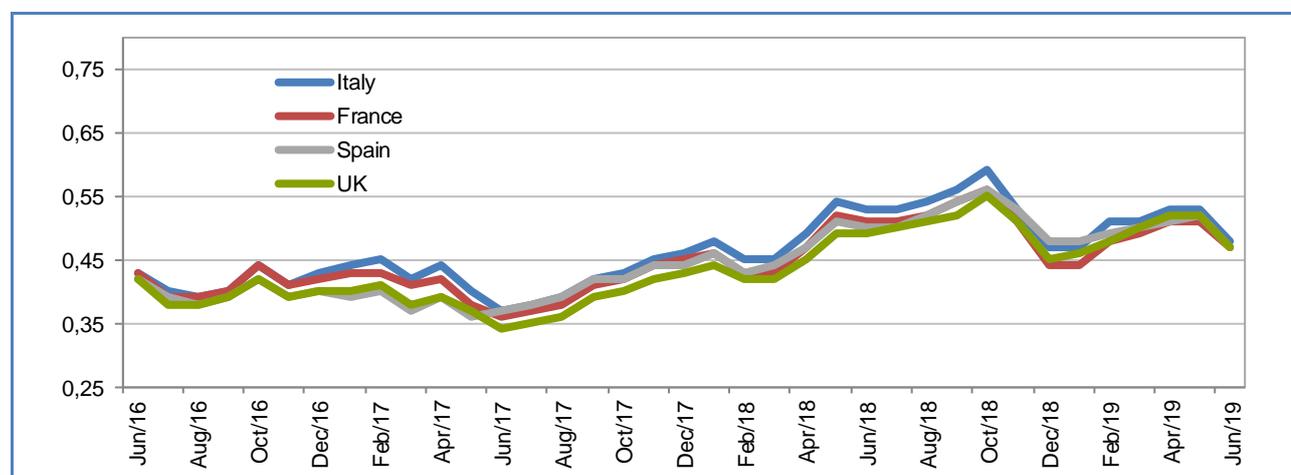
Average prices for marine fuel in **June 2019** ranged between 0,47 and 0,48 EUR/litre, in ports in **France, Italy, Spain,** and the **UK**. These prices were about 9% lower compared with the previous month and 7% lower compared with the same month a year ago.

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

Member State	Jun 2019	Change from May 2019	Change from Jun 2018
France <i>(ports of Lorient and Boulogne)</i>	0,47	-8%	-8%
Italy <i>(ports of Ancona and Livorno)</i>	0,48	-9%	-9%
Spain <i>(ports of A Coruña and Vigo)</i>	0,47	-10%	-6%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,47	-10%	-4%

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

Figure 54. 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 May 2019, experiencing a decrease compared to April 2019. Compared to a year earlier, it was 2,0%.

Inflation: lowest rates in May 2019, compared with April 2019.



Inflation: highest rates in May 2019, compared with April 2019.



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

HICP	May 2017	May 2018	Apr 2019	May 2019	Change from Apr 2019	Change from May 2018
Food and non-alcoholic beverages	102,30	104,60	105,89	106,47	↑ 0,5%	↑ 1,8%
Fish and seafood	106,07	108,96	110,09	110,88	↑ 0,7%	↑ 1,8%

Source: Eurostat.

7.3 Exchange rates

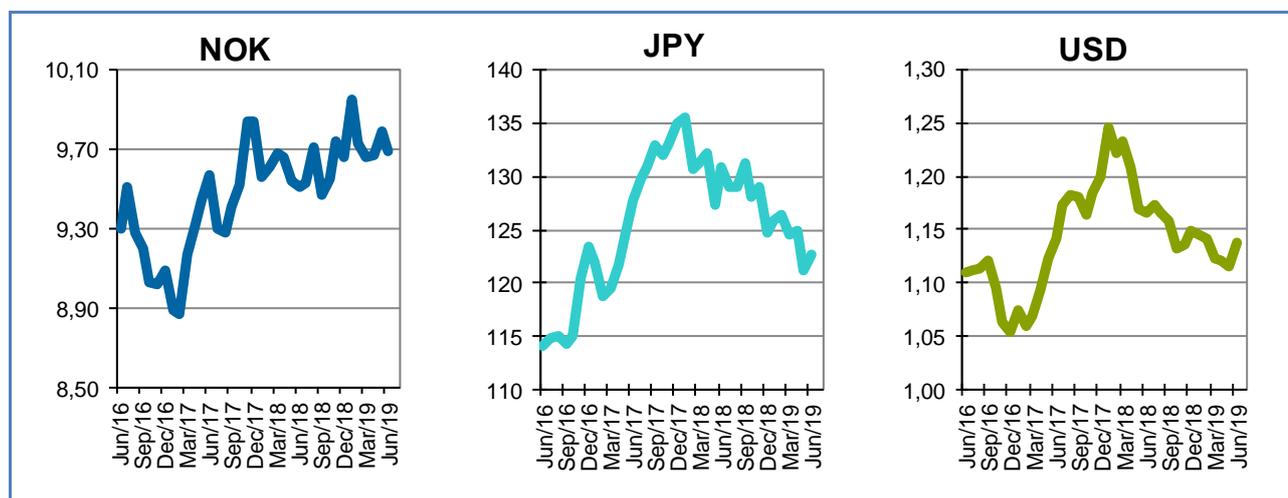
Table 17. EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Jun 2017	Jun 2018	May 2018	Jun 2019
NOK	9,5713	9,5115	9,7915	9,6938
JPY	127,75	129,04	121,27	122,60
USD	1,1412	1,1658	1,1151	1,1380

Source: European Central Bank.

In June 2019, the euro appreciated against the US dollar (+2,1%) and the Japanese yen (+1,1%) from May 2019. However, it depreciated again the Norwegian krone (-1,0%). For the past six months, the euro has fluctuated around 1,13 against the US dollar. Compared with June 2018, the euro has depreciated 5,0% against the Japanese yen and 2,4% against US dollar, but it appreciated 1,9% against the Norwegian krone.

Figure 55. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

Manuscript completed in July 2019

Neither the European Commission nor any person acting on behalf of the Commission is responsible for the use that might be made of the following information.

Luxembourg: Publications Office of the European Union, 2019

© European Union, 2019

Reuse is authorised provided the source is acknowledged.

The reuse policy of European Commission documents is regulated by Decision 2011/833/EU (OJ L 330, 14.12.2011, p. 39).

Copyright for photographs: © Eurofish, World Factbook, 2019

For any use or reproduction of photos or other material that is not under the EU copyright, permission must be sought directly from the copyright holders.

PDF ISSN 2314–9671

FOR MORE INFORMATION AND COMMENTS:

Directorate-General for Maritime Affairs and Fisheries

B-1049 Brussels

Tel: +32 229-50101

E-mail: contact-us@eumofa.eu

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

First sales: European Commission, European Council, FAO, roysfarm.com, regjering.no, fishsource.org, iffo.net, ICES, fac-europe.org, reasearchgate.net, spsg.co.uk, britishseafishing.co.uk.

Consumption: EUROPANEL.

Case studies: FARNET, Worldometers, Ireland's Seafood Development Agency, The Sea-Fisheries Protection Authority (SFPA), EUROSTAT, GOV.UK, ANFACO, European Tropical Tuna Fishing and Processing Committee (Eurothon), EUR-Lex.

Global highlights: European Commission, fis.com, Blue Marine Foundation, Pacific Islands Forum Fisheries Agency (FFA), Statistics Iceland.

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.

EUMOFA Privacy Policy