

## In this issue

In May 2019, first-sales value and volume grew in Belgium, Poland, Latvia, Sweden, and the UK over May 2018. In the same period, they declined in Denmark, Estonia, France, Italy, Lithuania, the Netherlands, and Portugal.

From June 2016 to May 2019, the average price of European eel in Portugal was about eight-fold higher than in Denmark. That of northern pike was the highest in the Netherlands (3,83 EUR/kg), 130% more than in Estonia and 86% higher than in Sweden.

Extra-EU import price of fresh whole European sea bass from Turkey was at 3,80 EUR/kg in the last week of June (week 26). This was an increase of 2% over the four-week average price of 3,73 EUR/kg, but 10% below the 4,21 EUR/kg price a year earlier.

In January–May 2019, the average retail price of fresh saithe for household consumption was 10,38 EUR/kg in Ireland, 3% higher than in France (10,10 EUR/kg).

The highest first-sales volume of hake was recorded in Pasajes (Spain) with almost 15.000 tonnes in 2017, followed by St Jean-de-Luz (France) with more than 6.000 tonnes and Hanstholm (Denmark) with 3.000 tonnes.

The EU exported 96.000 tonnes of seafood to the US, with a value of EUR 635 million in 2018. Spain is the most important exporter to the US, with 24% of the volume and 27% of the value of EU-US trade.

The European Commission has lifted the yellow card to Taiwan, acknowledging the progress with the fight against the IUU fishing.



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# 1 First sales in Europe

In **January–May 2019**, 12 EU Member States (MS) and Norway reported first-sales data for 10 commodity groups<sup>1</sup>. 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, Latvia, and Portugal. To be noted that herring first sales increased by a significant 44% in Latvia (+3.314 tonnes).

**Decreases in value and volume:** First sales declined in Belgium, Denmark, France, Lithuania, the Netherlands, and Sweden. The drop was particularly sharp in Lithuania due to a steep decline in first sales of cod and herring.

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

Country	January–May 2017		January–May 2018		January–May 2019		Change from January–May 2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
BE	6.863	25,64	6.151	25,44	5.684	23,83	-8%	-6%
DK	78.371	122,12	85.247	130,55	81.623	115,41	-4%	-12%
EE	28.125	6,25	29.791	6,59	33.217	6,88	12%	4%
FR	81.015	273,91	77.820	265,50	75.906	257,22	-2%	-3%
IT	36.208	131,06	33.249	127,11	31.682	132,41	-5%	4%
LV	30.398	6,30	22.245	4,24	26.769	4,57	20%	8%
LT	1.011	0,94	1.084	0,86	639	0,52	-41%	-39%
NL	44.229	113,68	154.115	217,52	113.527	169,73	-26%	-22%
NO	1.536.784	1.186,86	1.703.882	1.198,07	1.418.948	1.230,53	-17%	3%
PL	57.805	17,93	58.424	16,72	64.336	16,24	10%	-3%
PT	30.955	73,91	27.803	67,86	31.598	77,50	14%	14%
SE	34.461	23,27	67.863	31,66	58.830	27,97	-13%	-12%
UK	148.879	266,09	98.451	175,84	109.234	233,16	-9%	33%

\* 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).

Source: EUMOFA (updated 17.07.2019).

<sup>1</sup> Bivalves and other molluscs and aquatic invertebrates, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, other marine fish, salmonids, small pelagics, tuna and tuna-like species.



## 1.2 In May 2019

**Increases in value and volume:** First sales grew in Belgium, Poland, Latvia, Sweden, and the UK. The growth was particularly sharp in the Baltic countries because of higher supplies of herring and sprat.

**Decreases in value and volume:** First sales declined in Denmark, Estonia, France, Italy, the Netherlands, and Portugal. Lithuania registered one of the largest declines, mainly due to cod and other groundfish.

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

Country	May 2017		May 2018		May 2019		Change from May 2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
BE	1.126	4,62	668	2,53	1.075	4,41	61%	74%
DK	15.980	26,73	16.737	30,57	9.783	21,76	-42%	-29%
EE	7.011	1,70	7.057	1,76	4.456	1,12	-37%	-36%
FR	16.548	54,32	16.655	52,61	14.288	51,28	-14%	-3%
IT	10.928	36,84	10.353	37,14	8.631	34,98	-17%	-6%
LV	3.904	0,88	2.492	0,57	4.211	0,77	69%	34%
LT	305	0,21	290	0,19	120	0,09	-59%	-54%
NL	8.299	22,38	30.157	43,39	23.504	35,81	-22%	-17%
NO	229.246	150,26	232.108	151,89	231.706	160,28	0%	6%
PL	8.862	2,83	5.121	1,30	10.845	2,86	112%	120%
PT	9.108	15,59	9.117	16,68	7.495	15,22	-18%	-9%
SE	5.618	5,30	6.857	5,34	16.168	7,29	136%	37%
UK	17.799,86	43,99	13.779,57	35,92	17.724,93	41,91	29%	17%

\*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).

Source: EUMOFA (updated 17.07.2019); volume data is reported in net weight.

The most recent weekly first-sales data (up to week 30-2019) available in EUMOFA can be accessed [here](#).

### 1.3 First sales in selected countries


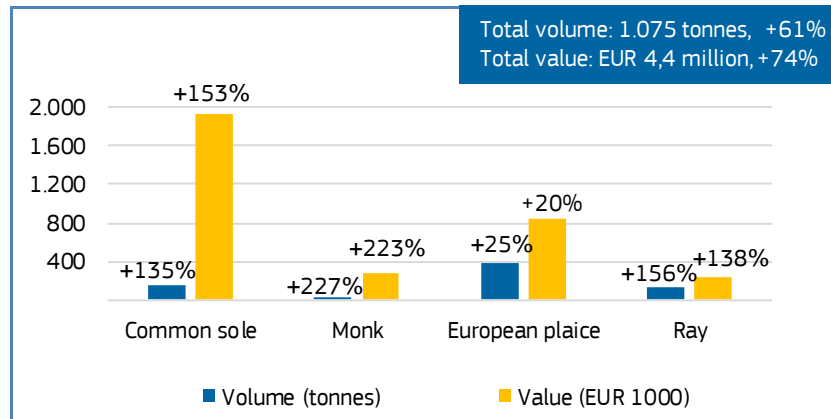
 In **Belgium** in **January–May 2019**, overall first-sales value and volume fell by 6% and 8%, respectively, from the same period in 2018. The species contributing the most to this decline were cuttlefish, scallop, and European plaice. In **May 2019**, both total value and volume were much higher compared with May 2018. Common sole, monk, European plaice, and ray were among the key species responsible for these trends. Of the top valued species, the average price of monk fell by 14% to 9,73 EUR/kg.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 17.07.2019).


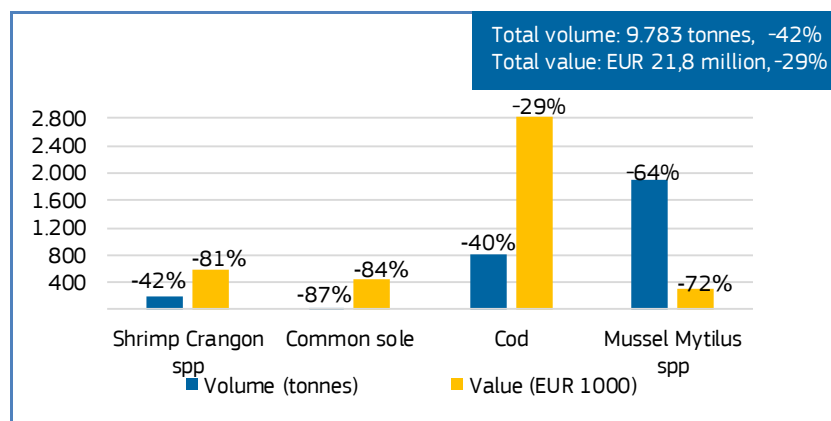
 In **Denmark** in **January–May 2019**, first-sales value fell by 12%, and volume 4% compared to the same period in 2018, due to mussel *Mytilus* spp., shrimp *Crangon* spp., herring, and cod. In **May 2019**, first sales decreased in both value and volume compared to May 2018. These declines were mainly for shrimp *Crangon* spp., common sole, cod, and mussel *Mytilus* spp. The average price increased significantly for saithe raising to 1,62 EUR/kg (+42%).

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



Percentages show change from previous year.  
Source: EUMOFA (updated 17.07.2019).


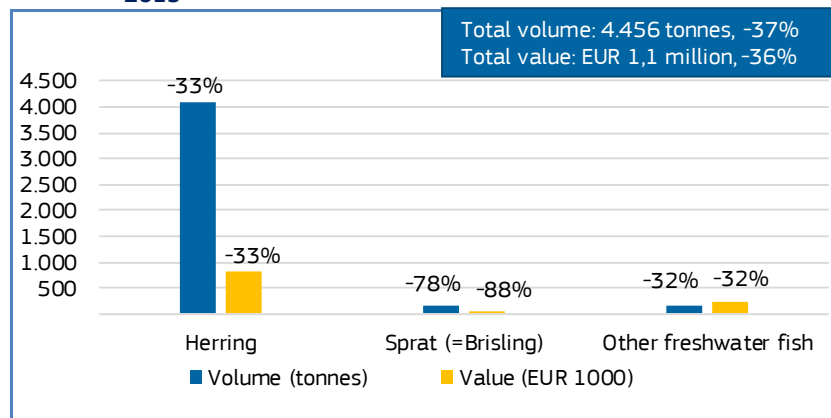
 In **Estonia** in **January–May 2019**, herring was the main factor behind the growth in overall first-sales value (+4%) and volume (+12%), in comparison to the same period in 2018. However, the same species, together with sprat and freshwater fish species\*, were responsible for a drop in overall first sales in **May 2019** compared to May 2018. The average price of herring remained stable, while that of sprat decreased by 46% to 0,12 EUR/kg, although its volume sold fell (-88%) as well.

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



Percentages show change from previous year.

\*EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

Source: EUMOFA (updated 17.07.2019).


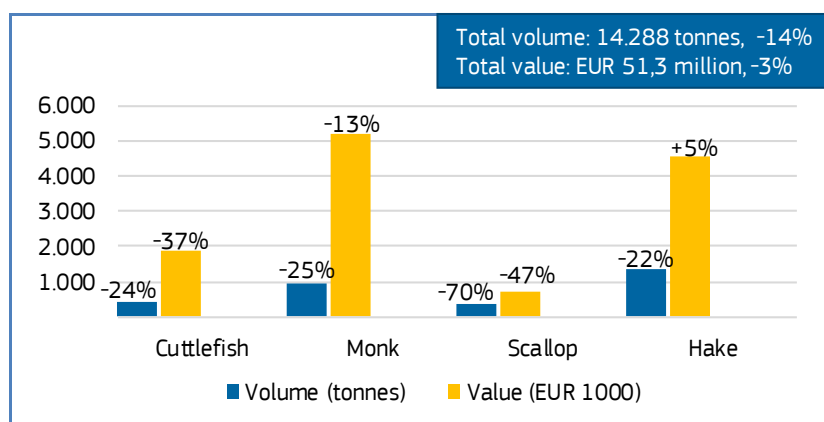
 In **France** in **January–May 2019**, first sales decreased by 3% in value and by 2% in volume from January–May 2018. The value of hake, cuttlefish, and monk, and the volume of saithe and clam, were the factors most responsible for these changes. In **May 2019**, both first-sales value and volume declined compared to May 2018. Cuttlefish, monk, scallop, and hake were among the top species that recorded the largest decreases. The average price for scallop sharply increased to 2,10 EUR/kg (+77%).

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



Percentages show change from previous year.  
Source: EUMOFA (updated 17.07.2019).


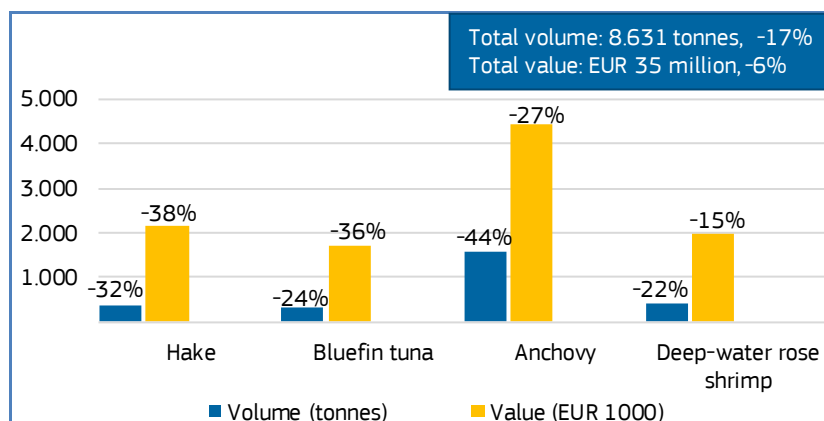
 In **Italy** in **January–May 2019** compared to the same period in 2018, first-sales value grew by 4%, while volume fell by 5%. This was mainly due to anchovy, which recorded low catches and a large price increase. In **May 2019**, first sales decreased in value and volume compared to May 2018. Hake, bluefin tuna, anchovy, and deep-water rose shrimp were the main species attributable for the decreases. The average price of anchovy sharply grew to 2,83 EUR/kg (+126%).

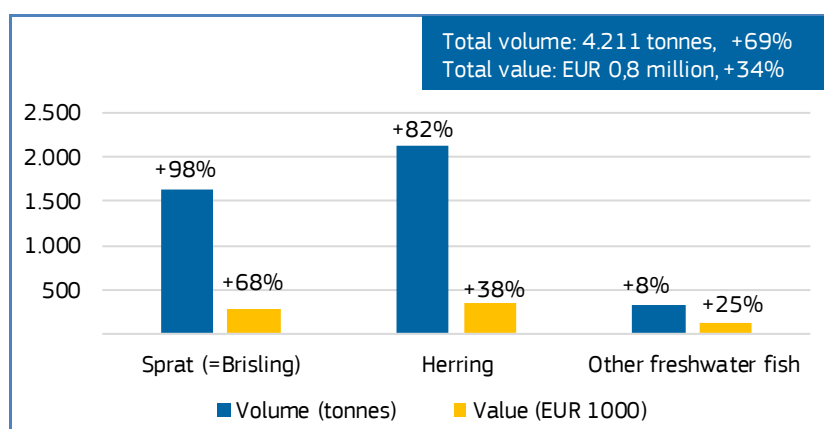
Figure 5. **FIRST SALES OF MAIN COMMERCIAL SPECIES IN ITALY, MAY 2019**



Percentages show change from previous year.  
Source: EUMOFA (updated 17.07.2019).

 In **Latvia** in **January–May 2019**, herring was a main reason for the first-sales value and volume increase (+8% and +20%, respectively) over the same period in 2018. In **May 2019**, first sales significantly increased in both value and volume compared to May 2018. Higher supplies of herring, sprat, and freshwater fish species\* were the main factors behind the positive trends. Because of the high volume sold, the average price of herring decreased by 24% to 0,16 EUR/kg, while that of sprat fell by 15% to 0,17 EUR/kg.

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



Percentages show change from previous year.  
\*EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).  
Source: EUMOFA (updated 17.07.2019).


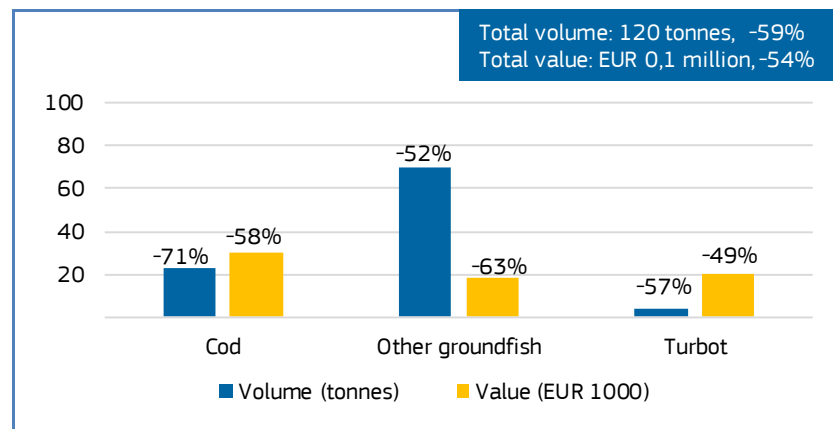
 In **Lithuania** in **January–May 2019**, first sales decreased by 39% in value and 41% in volume from January–May 2018, which was mainly caused by cod, herring, and smelt. In **May 2019**, first sales in value and volume decreased from May 2018 due largely to the same species, in addition to turbot and groundfish species\*. The average price of cod grew sharply (+46%) to 1,35 EUR/kg, while that of herring almost doubled, reaching 0,33 EUR/kg (+90%).

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



Percentages show change from previous year.

\*EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

Source: EUMOFA (updated 17.07.2019).


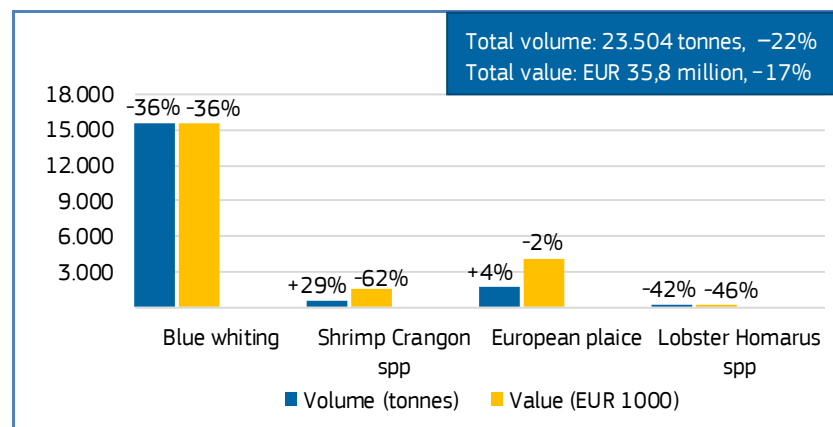
 In the **Netherlands** in **January–May 2019**, first sales fell by 22% in value and 26% in volume from the same period in 2018. The species most responsible for the decreases included blue whiting and Atlantic horse mackerel. In **May 2019**, both first-sales value and volume fell mainly due to blue whiting from May 2018. Among the top valued species, the average price of shrimp *Crangon* spp. decreased by 71% to 2,72 EUR/kg. Such strong decrease in price was due to large quantity of shrimp *Crangon* in stock and high catches in the recent period.

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



Percentages show change from previous year.

Source: EUMOFA (updated 17.07.2019).


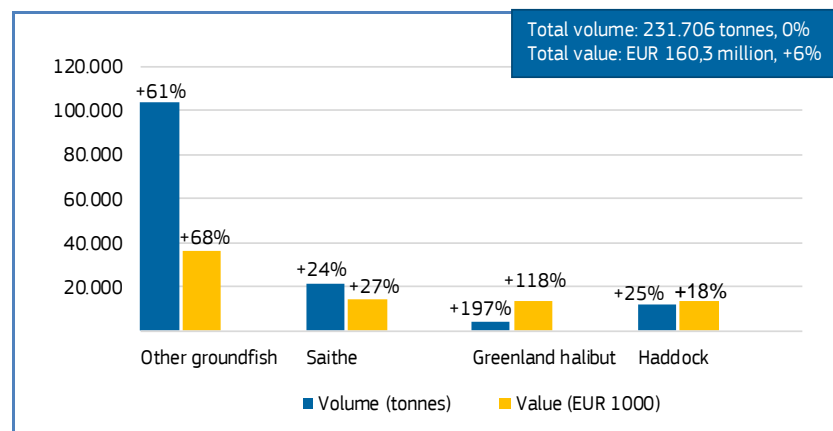
 In **Norway** in **January–May 2019**, first sales increased by 3% in value (due to cod and mackerel) and fell by 17% in volume (due to miscellaneous small pelagics and blue whiting) from the same period in 2018. In **May 2019** compared to May 2018, first-sales value grew, while volume remained stable. The main species contributed to first sales include groundfish species\*, saithe, Greenland halibut, haddock, and cod. The price of Greenland halibut decreased by 27% to 3,38 EUR/kg, and that of crab increased by 17% to 6,84 EUR/kg.

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



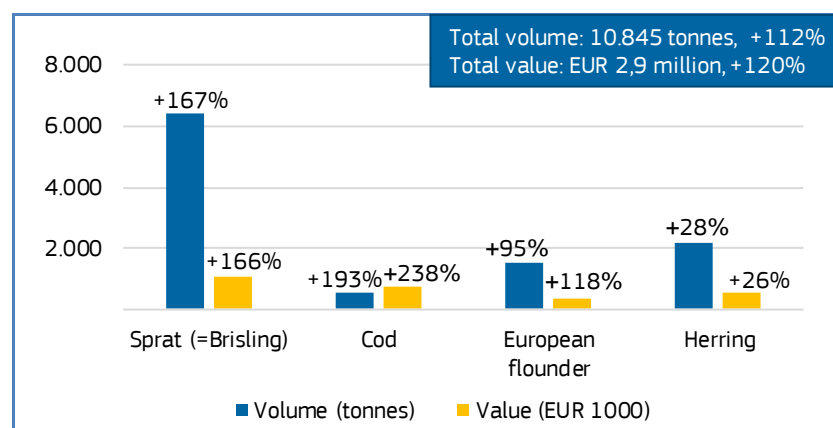
Percentages show change from previous year. Volume data is reported in live weight equivalent (lwe). Prices are reported in EUR/kg of live weight.

\*EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

Source: EUMOFA (updated 17.07.2019).

 In **Poland** in **January–May 2019**, first sales decreased by 3% in value (due to trout and herring), while volume increased by 10% (due to sprat, European flounder, and cod) compared to the same period in 2018. In **May 2019**, first-sales value and volume more than doubled compared to May 2018, with sprat, cod, European flounder, and herring being the main factors. Price increases were recorded for most of the key species, with the exception of herring, whose price slightly decreased (-2%) to 0,25 EUR/kg.

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



Percentages show change from previous year.

Source: EUMOFA (updated 17.07.2019).


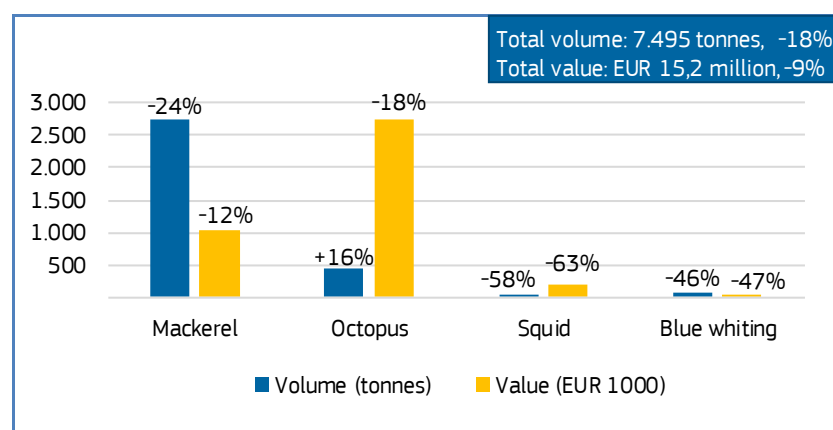
 In **Portugal** in **January–May 2019**, first sales increased by 14% in both value and volume compared to the same period in 2018, mostly because of octopus, anchovy, and Atlantic horse mackerel. In **May 2019**, first-sales value and volume declined compared to May 2018, mainly due to mackerel, octopus, squid, and blue whiting. Octopus recorded a price decrease of 29% to 6,05 EUR/kg due to a 16% increase in its volume sold.

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



Percentages show change from previous year.

Source: EUMOFA (updated 17.07.2019).




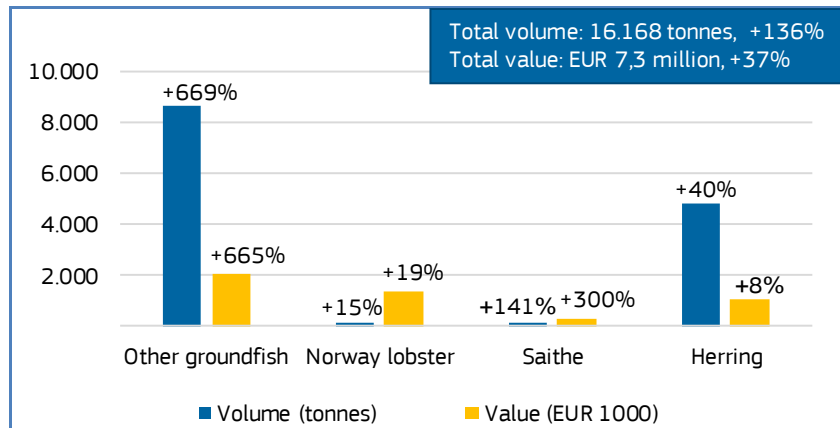
 In **Sweden**, decreases in first-sales value (-12%) and volume (-13%) in **January–May 2019** from the same period in 2018 were caused mostly by the most important species in its fisheries: herring and cod. In **May 2019**, both value and volume reversed and grew over May 2018 as first sales increased mainly because of other groundfish species (most importantly, sandeel). Other contributing species included Norway lobster, saithe, and herring. The average price of saithe grew by 66% to 1,72 EUR/kg, and that of herring fell by 23% to 0,22 EUR/kg.

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



Percentages show change from previous year.  
Source: EUMOFA (updated 17.07.2019).


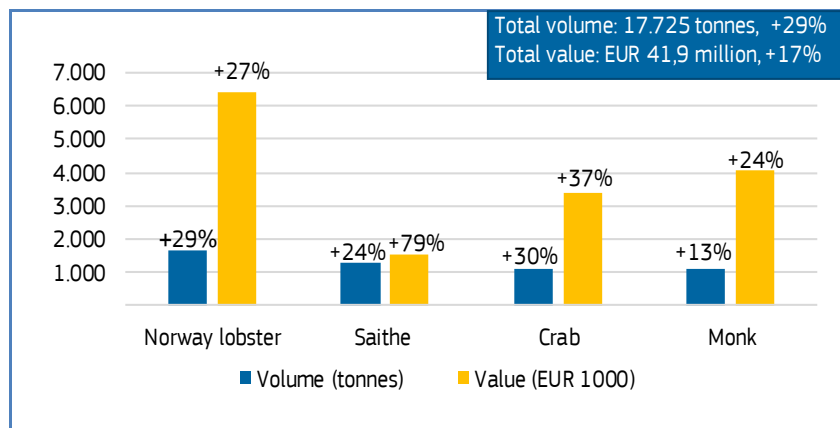
 In the **UK** in **January–May 2019**, first-sales value and volume increased by 33% and 11%, respectively, compared to the same period in 2018. The increases were mostly caused by Norway lobster, mackerel, crab, saithe, and haddock. In **May 2019**, higher first sales of Norway lobster, saithe, crab and monk caused an overall first-sales increase over May 2018. Among the key species, a large decrease in average price was recorded for European saithe, whose price grew by 43% to 1,23 EUR/kg.

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

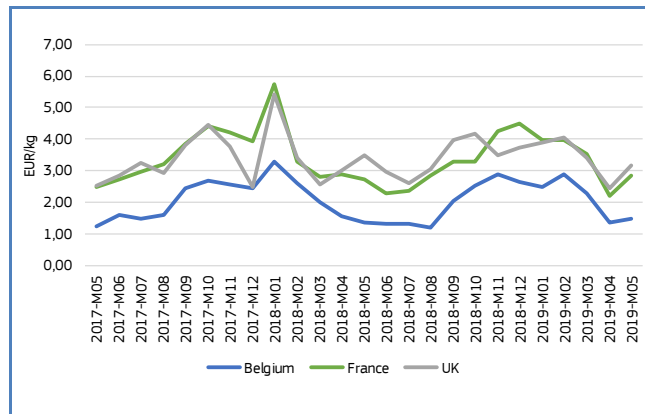


Percentages show change from previous year.  
Source: EUMOFA (updated 17.07.2019).



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

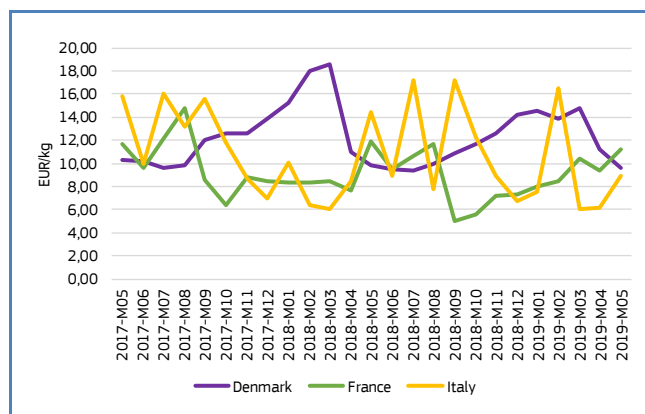
Figure 14. **FIRST-SALES PRICES OF MEGRIM IN BELGIUM, FRANCE, AND THE UK**



Source: EUMOFA (updated 17.07.2019).

First sales of **megrim** in the EU take place mainly in three reporting Member States: **Belgium, France,** and the **UK**. The average first-sales prices in May 2019 were 1,49 EUR/kg in Belgium (up by 11% from April 2019 and 12% over May 2018); 2,84 EUR/kg in France (up by 30% over the previous month and up 4% over a year earlier); and, in Portugal the price in April 2019 (the latest available month) was 2,44 EUR/kg (which was down by 29% from the previous month and down by 18% from a year earlier). Megrim prices in these three markets tend to move together, all peaking in the winter and hitting low points in the spring and summer.

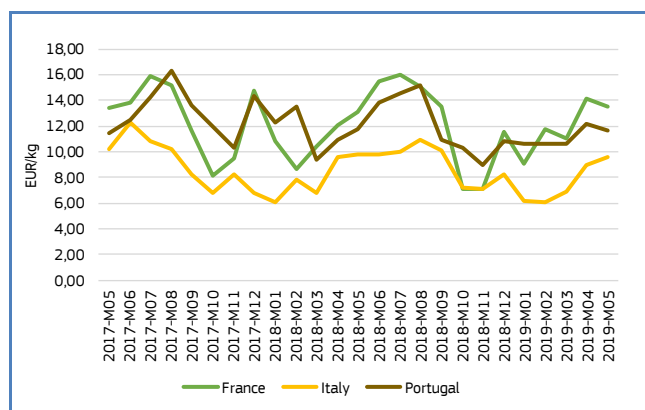
Figure 15. **FIRST-SALES PRICES OF EEL IN DENMARK, FRANCE, AND ITALY**



Source: EUMOFA (updated 17.07.2019).

First sales of **eel** among reporting European countries occur in many of them, including **Denmark, France,** and **Italy**. In May 2019, the average first-sales price of eel were: 9,62 EUR/kg in Denmark (down by 14% from April 2019 and by 2% from May 2018); 11,24 EUR/kg in France (up by 8% from the previous month and by 5% from a year earlier); and 8,89 EUR/kg in Italy (an increase of 43% from April 2019 but a decrease of 38% below the price in May 2018). First-sales volumes are very seasonal in Italy and Denmark, with a sharp October peak in Denmark, followed in Italy with a peak two months later. However, prices in these markets are not correlated with each other.

Figure 16. **FIRST-SALES PRICES OF GILTHEAD SEABREAM IN FRANCE, ITALY, AND PORTUGAL**



Source: EUMOFA (updated 17.07.2019).

EU first sales of **gilthead seabream** take place almost entirely in **France, Italy,** and **Portugal**. In May 2019, the average first-sales prices were: 13,55 EUR/kg in France (down by 4% from April 2019 but up by 3% from May 2018); 9,55 EUR/kg in Italy (up by 39% from the previous month but down by 5% from a year earlier); and 11,70 EUR/kg in Portugal (a decrease of 4% from April 2019 and 0,2% below the price in May 2018). Volumes sold in first sales markets are very seasonal in France, where the majority of reported sales occur, peaking in October of each year, with less seasonal volume in Italy and Portugal.

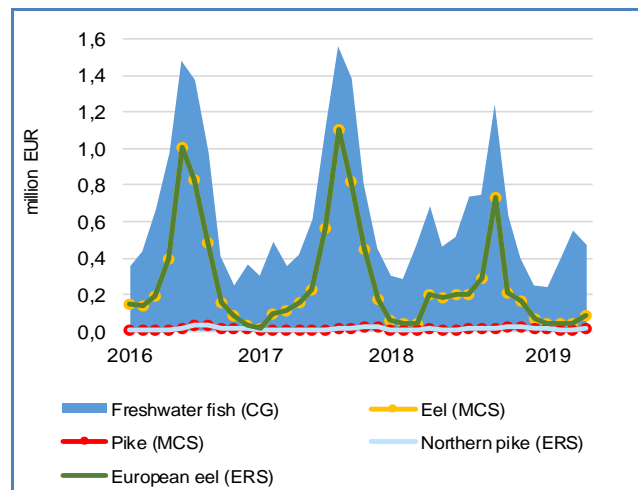
## 1.5. Commodity group of the month: freshwater fish

The **freshwater fish** commodity group (CG) ranked 9<sup>th</sup> in both value and volume among ten CGs sold at the first-sales stage in May 2019<sup>2</sup>. First sales of these species reached EUR 0,48 million and 524 tonnes, decreasing by 31% in value and 10% in volume from May 2018. In the past 36 months, the highest value of freshwater fish first sales was registered in October 2017, at about EUR 1,6 million.

Freshwater fish includes six main commercial species (MCS): carp, eel, freshwater catfish, pike, pike-perch, and the grouping "other freshwater fish".

At ERS level, European eel (18%) and northern pike (3%) together made up 21% of total reported first-sales value of freshwater fish species in May 2019.

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



\*Norway excluded from the analyses.  
Source: EUMOFA (updated 17.07.2019).

## 1.6. Focus on European eel



European eel is a catadromous fish that spawns and is born at sea, and then migrates into inland freshwaters.

European eel spawns in the Sargasso Sea in the middle of the North Atlantic, after which the larvae migrate to the coasts of Europe by drifting on the Gulf Stream. They spend most of their lifetime (6 to 20 years) in freshwater.

It can live for over 80 years and reach up to 130 cm in length, but the average length of adults is around 60-80 cm, when they weigh around 1-2 kg<sup>3</sup>.

The main European glass eel (fry stage) fisheries are concentrated along the Atlantic coasts of Portugal, Spain, France, Morocco, and the Bristol Channel in the UK. Elsewhere, eel fisheries are maintained by restocking within the country, often supplemented by imports, mainly from France, Spain and Portugal<sup>4</sup>.

The fishery takes place while eels are migrating, when they are trapped and netted in estuaries and inshore waters. In 2007, the EU adopted measures<sup>5</sup> for the protection, recovery, and sustainable use of the eel stock. Today the fishery is managed under long-term plans drawn up by the EU Member States at river-basin level. EU Member States which catch glass eels (juvenile eel less than 12 cm long) need to reserve 60 % of their catches for restocking within the EU.

The species was listed in Appendix II of the Convention on International Trade in Endangered Species (CITES) in 2007, although it did not come into force until March 2009. Since then, any international trade in this species needs to be accompanied by a permit<sup>6</sup>. It is sold fresh or prepared (smoked, marinated, cooked, preserved or frozen)<sup>7</sup>.

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

<sup>3</sup> [https://ec.europa.eu/fisheries/marine\\_species/wild\\_species/eel\\_en](https://ec.europa.eu/fisheries/marine_species/wild_species/eel_en)

<sup>4</sup> <https://www.traffic.org/publications/eels-their-harvest-and-trade-in-europe-and-asia.html>

<sup>5</sup> COUNCIL REGULATION (EC) No 1100/2007, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32007R1100&from=EN>

<sup>6</sup> ICES, [http://ices.dk/sites/pub/Publication%20Reports/Expert%20Group%20Report/acom/2018/WGEEL/wgeel\\_2018.pdf](http://ices.dk/sites/pub/Publication%20Reports/Expert%20Group%20Report/acom/2018/WGEEL/wgeel_2018.pdf)

<sup>7</sup> [https://ec.europa.eu/fisheries/marine\\_species/farmed\\_fish\\_and\\_shellfish/eel\\_en](https://ec.europa.eu/fisheries/marine_species/farmed_fish_and_shellfish/eel_en)

## Selected countries

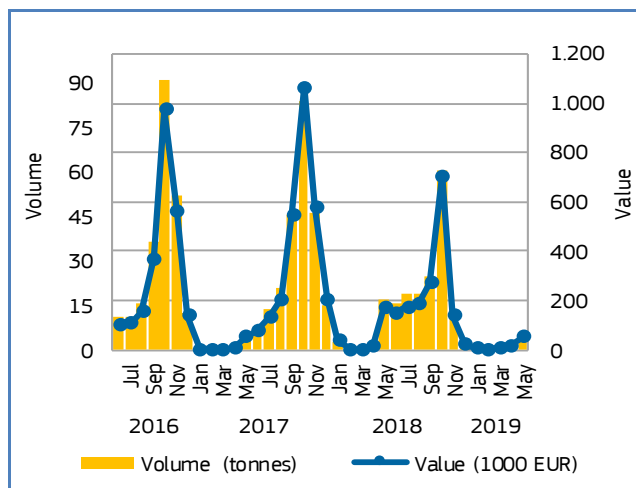
In **Denmark** in January–May 2019, first sales of European eel decreased by 60% in both value and volume compared with the same period in 2018. Compared to 2017, first sales in 2019 increased by 28% in value and 29% in volume.

Of freshwater fish species sold at first-sales stage in May 2019, the value of European eel accounted for almost all of the total, and its volume for 78% of the total.

The eel fishery involves the use of simple gear – baited traps, fyke nets, baited long lines, spears or shore seines. The peak season in Danish eel fishery is when eel migrates to the sea.

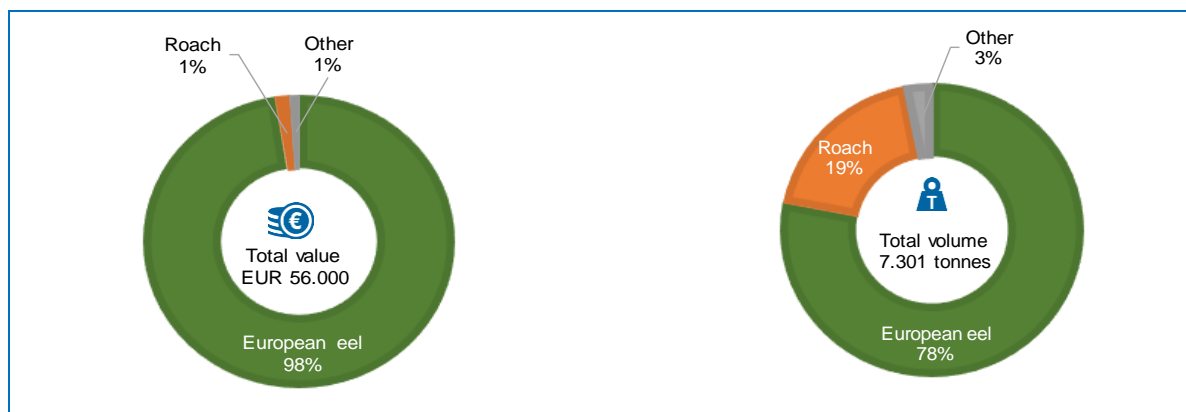
In January–May 2019, Hadsund on the North Sea coast and Kerteminde, Nordhammer, and Kalvehave on the Baltic Sea are the most important ports in terms of first-sales value.

Figure 18. **EUROPEAN EEL: FIRST SALES IN THE DENMARK**



Source: EUMOFA (updated 17.07.2019).

Figure 19. **FIRST-SALES COMPARISON OF FRESHWATER FISH SPECIES (ERS) IN DENMARK, VALUE AND VOLUME, MAY 2019**



Source: EUMOFA (updated 17.07.2019).

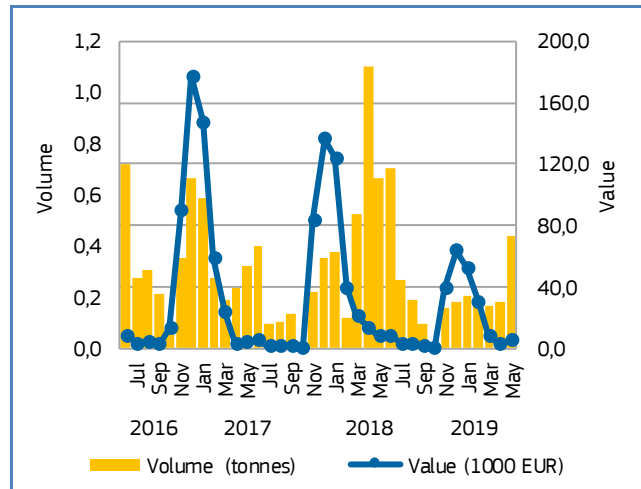
In **Portugal** in January–May 2019, first sales of European eel fell by 51% in value and 58% in volume compared to January–May 2018. Compared with January–May 2017, first-sales value and volume were down by 58% and 28%, respectively.

Of freshwater fish species sold in May 2019, European eel composes 86% of total first-sales value and 65% of volume.

In Portugal, fishermen use hand-held nets and traps in eel fishery.

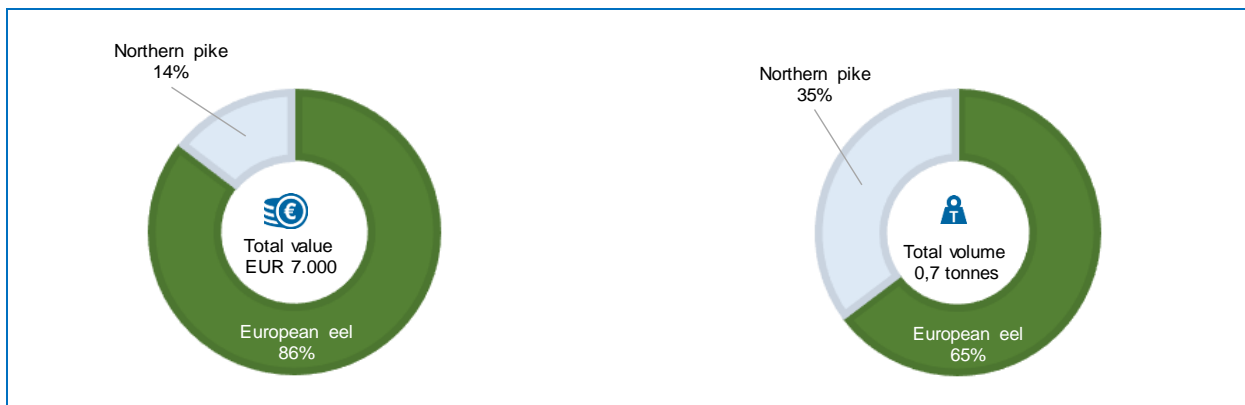
Viana do Castelo and Peniche are the fishing ports where most first sales occurred in January–May 2019.

Figure 20. **EUROPEAN EEL: FIRST SALES IN PORTUGAL**



Source: EUMOFA (updated 17.07.2019).

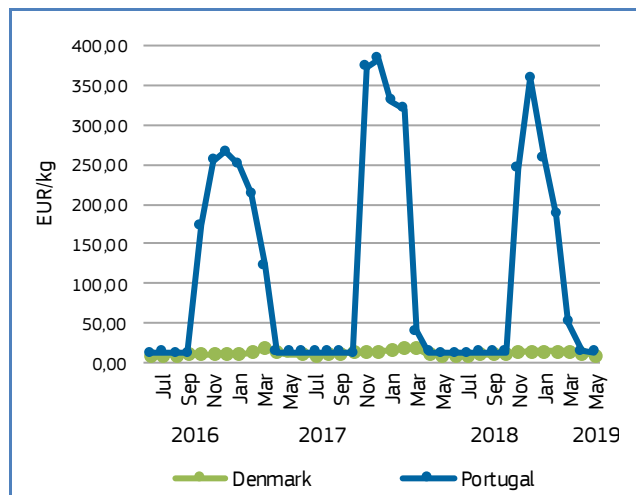
Figure 21. **FIRST-SALES COMPARISON OF FRESHWATER FISH SPECIES (ERS) IN PORTUGAL, VALUE AND VOLUME, MAY 2019**



Source: EUMOFA (updated 17.07.2019).

## Price trends

Figure 22. EUROPEAN EEL: FIRST-SALES PRICE IN SELECTED COUNTRIES



Source: EUMOFA (updated 17.07.2019).

In the observed 36-month period (June 2016–May 2019), the average price of European eel in Portugal (113,33 EUR/kg), was about eight-fold higher than in Denmark (12,07 EUR/kg). This significant difference is due to first sales of glass eel in Portugal, which is more valued compared to adult (silver) eel. Compared with the southern part of Europe, few glass eels reach the coast in northern Europe, where traditional fisheries focus on adult eels on their way to the sea to spawn, which is the reason why first sales of eel do not reach that high price in Denmark in comparison to Portugal<sup>8</sup>.

In **Denmark** in May 2019, the average first-sales price of adult eel (9,62 EUR/kg) decreased by 2% from May 2018. During the past 36 months, the lowest price was recorded in July 2018 at 9,39 EUR/kg for about 19 tonnes.

In **Portugal**, the average price of 13,51 EUR/kg in May 2019 was 13% over the price in May 2018 and 4% higher than in 2017. The highest price usually occurs during winter: in the past 36 months, it reached a peak in December 2017 when 356 kg of mainly glass eel were sold at an average price of 383,00 EUR/kg. The lowest price occurred in June 2016 at 11,89 EUR/kg for 721 kg of adult (silver) eel.



### 1.7. Focus on Northern pike

The northern pike (*Esox lucius*), which belongs to the family of Esocidae, is one of the few species of freshwater fishes that is native to both North America and Eurasia. It has been introduced to other parts of the world, for example Australia, and New Zealand. It is a highly territorial predator, which inhabits lakes and rivers of all sizes, before moving into weedy shallows to spawn in spring. Because of its low salinity, the Baltic Sea in northern Europe is home to a brackish-water population of large pike. Throughout this species' global introduction, pike has been introduced into lakes predominantly as a fisheries target, with other attempts (usually unsuccessful) into rivers<sup>9</sup>.

It takes a year for the fish to reach sexual maturity, and full life expectancy ranges from 5 to 30 years, depending on habitat and food availability. It reaches 130 cm in length and up to 34 kg in weight<sup>10</sup>. Pike is one of the most valuable species for fisheries and angling in lakes, rivers, and in the coastal zone of the Baltic Sea.

In the EU, some Member States have established Minimum Size Limits (MSL) and seasonal or permanent closure for pike that vary between and within countries. The length of fish is determined by measuring the distance from the tip of the

<sup>8</sup> <https://www.traffic.org/publications/eels-their-harvest-and-trade-in-europe-and-asia.html>

<sup>9</sup> <https://www.cabi.org/isc/datasheet/83118>

<sup>10</sup> <http://www.fao.org/fishery/species/2942/en>

snout to the end of the caudal fin. According to IUCN, currently this species is of relatively low conservation concern and does not require significant additional protection or major management, monitoring, or research action<sup>11</sup>.

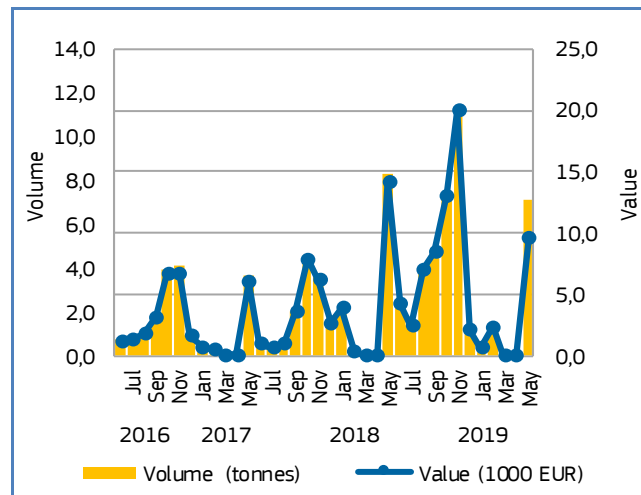
## Selected countries

In **Estonia** in January–May 2019, northern pike first sales declined by 32% in value and 17% in volume from the same period in 2018. Compared to the same period in 2017, first sales rebounded by 71% in value and 82% in volume.

Northern pike accounted for 4% of both value and volume among freshwater fish species sold in May 2019.

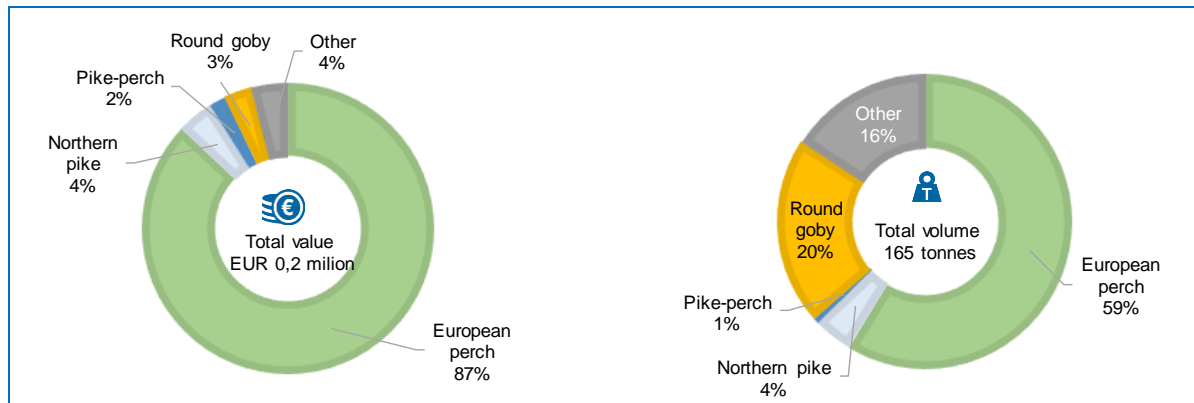
The main ports for first sales of northern pike were Nasva jõesadam, Haapsalu Kalasadam, and Puisseon on the coast of the Baltic Sea.

Figure 23. **NORTHERN PIKE: FIRST SALES IN ESTONIA**



Source: EUMOFA (updated 17.07.2019).

Figure 24. **FIRST-SALES COMPARISON OF FRESHWATER FISH SPECIES (ERS) IN ESTONIA, VALUE AND VOLUME, MAY 2019**



Source: EUMOFA (updated 17.07.2019).

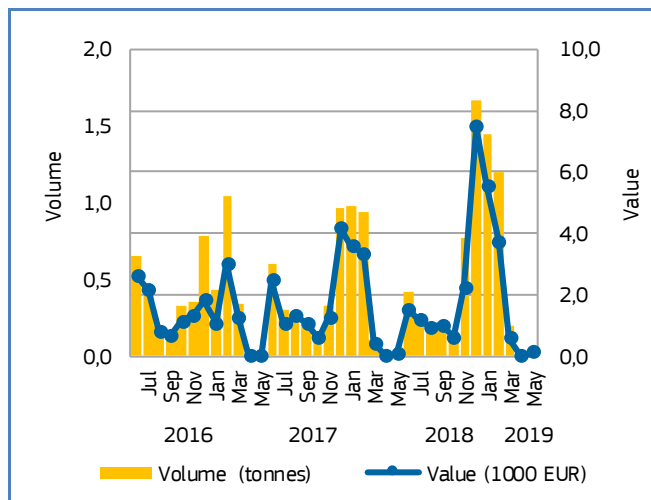
<sup>11</sup> <https://www.iucnredlist.org/species/135631/133427422>

In the **Netherlands** in January–May 2019, first sales of northern pike increased by 36% in value and 40% in volume over January–May 2018. Compared to 2017, due to a rise in prices, first-sales value nearly doubled (+88%), while volume increased by 59%.

Among the freshwater fish species, northern pike's share accounted for 2% of both value and volume in May 2019.

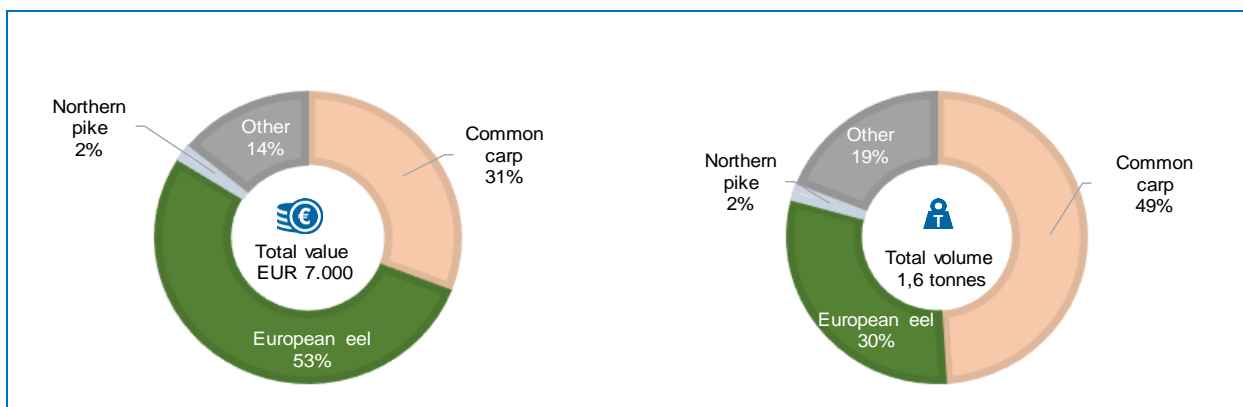
IJmuiden/Velsen on the coast of the North Sea was the port where 97% of first sales occurred.

Figure 25. **NORTHERN PIKE: FIRST SALES IN THE NETHERLANDS**



Source: EUMOFA (updated 17.07.2019).

Figure 26. **FIRST-SALES COMPARISON OF FRESHWATER FISH SPECIES (ERS) IN THE NETHERLANDS, VALUE AND VOLUME, MAY 2019**



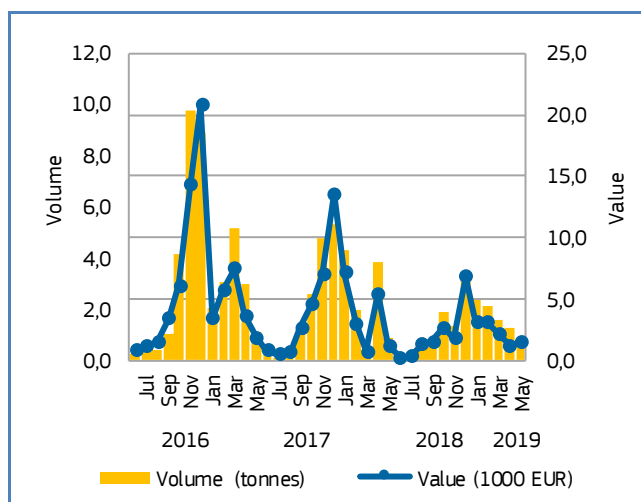
Source: EUMOFA (updated 17.07.2019).

In **Sweden** in January–May 2019, first sales of northern pike fell by 37% in value and 28% in volume from the same period in 2018. Compared to 2017, first-sales value fell by about half, whereas volume recorded a decline of 43%.

Northern pike accounted for 33% of value and 42% of volume among first sales of freshwater fish registered in May 2019.

Göteborg was the port where most of the first sales of northern pike occurred in January–May 2019.

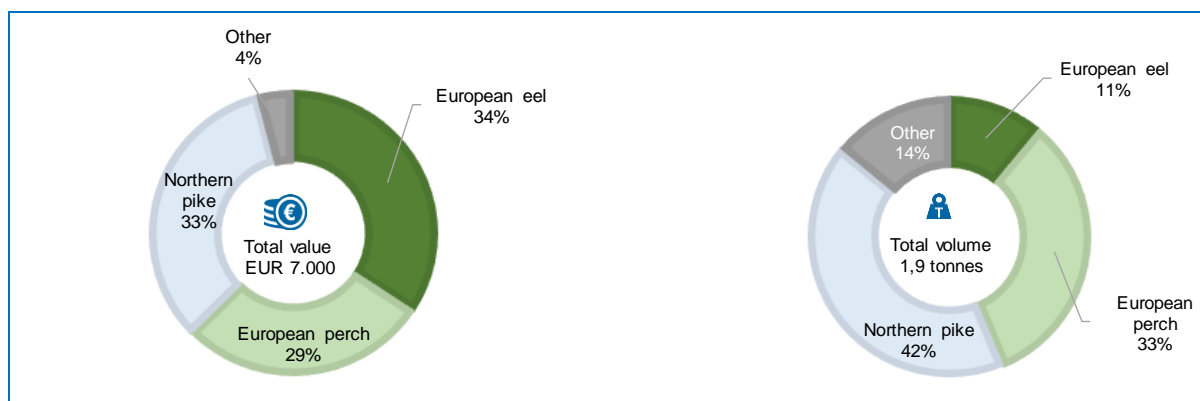
Figure 27. **NORTHERN PIKE: FIRST SALES IN SWEDEN**



Source: EUMOFA (updated 17.07.2019).



Figure 28. **FIRST-SALES COMPARISON OF FRESHWATER FISH SPECIES (ERS) IN SWEDEN, VALUE AND VOLUME, MAY 2019**



Source: EUMOFA (updated 17.07.2019).

## Price trends

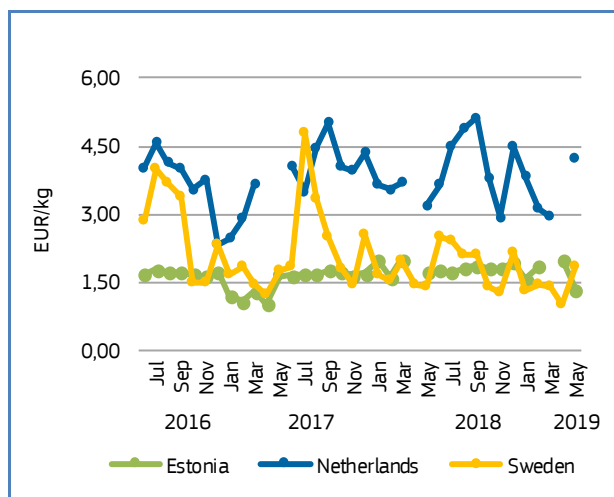
For the past 36 months (May 2016–June 2019), in the three selected countries, the highest average price of northern pike was observed in the Netherlands (3,83 EUR/kg), 130% more than in Estonia (1,67 EUR/kg) and 86% higher than in Sweden (2,06 EUR/kg).

In **Estonia** in May 2019, the price of 1,34 EUR/kg was lower than in May 2018 (-21%) and May 2017 (-18%). Supply fluctuates throughout the year, with the highest catches in autumn and lowest in winter and spring. In the observed period, there were no registered first sales of pike in March due to the closure period for fishery.

In the **Netherlands** in May 2019, the average price of northern pike was 4,24 EUR/kg, which was the highest among the surveyed countries, and an increase of 33% over May 2018. The peak season of pike fishery occurred in winter, from December to February, whereas low season was in spring and during summer.

In **Sweden**, the average price of northern pike in May 2019 was 1,82 EUR/kg, or 32% higher than in May 2018 and 5% over May 2017. During the past 36 months, November and December were the months with the highest first sales, whereas in June and August supply was minor.

Figure 29. **NORTHERN PIKE: FIRST-SALES PRICE IN SELECTED COUNTRIES**



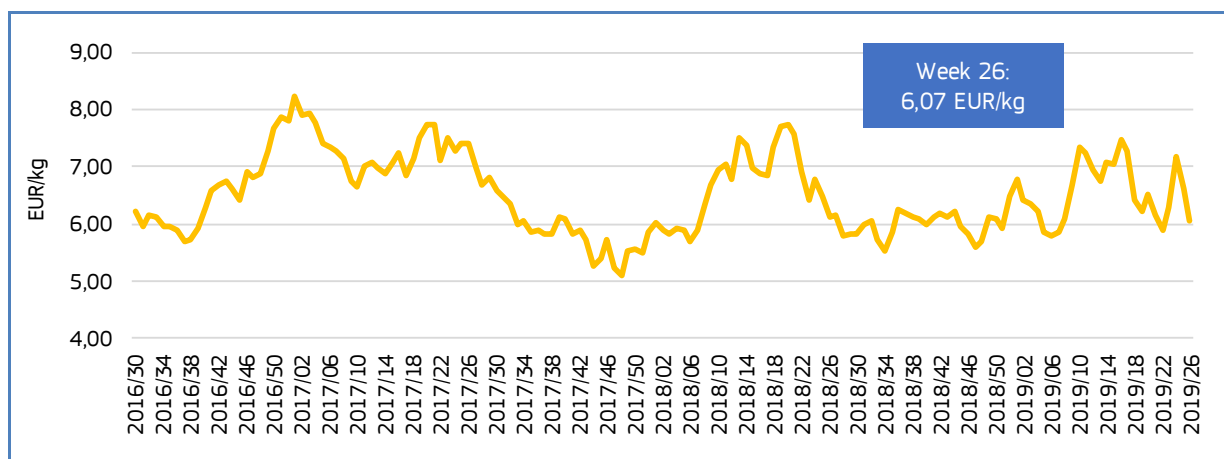
Source: EUMOFA (updated 17.07.2019).

## 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 (this month, freshwater fish), and they are fresh fillets of Nile perch from Uganda, frozen catfish from Vietnam, and frozen tilapia from China. The remaining three are randomly selected, and this month include frozen yellowfin tuna from Seychelles, frozen swordfish from China, and fresh European seabass from Turkey.

The weekly price of **fresh whole Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway** dropped to 6,07 EUR/kg in **week 26** (commencing on June 24th). This price was down by 7% from the preceding four-week average of 6,49 EUR/kg and down by -0,5% from the price of 6,10 EUR/kg prevailing a year earlier. The price drop in week 26 must be related to higher harvest activity in week 25 and 26. Import volume in week 26 totalled 11.940 tonnes, which was up by 5% from the average during the previous four weeks but down by 9% from a year earlier.

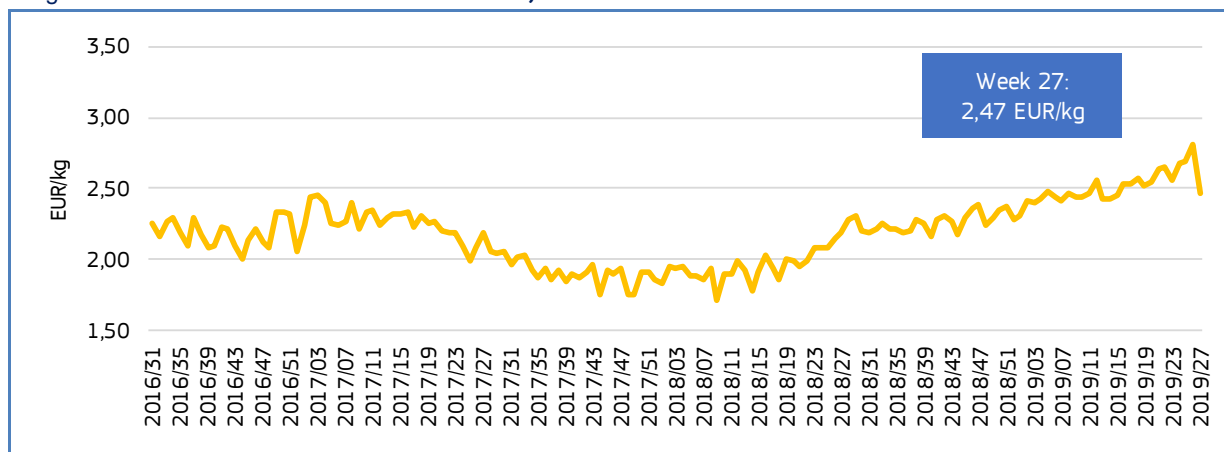
Figure 30. **IMPORT PRICE OF ATLANTIC SALMON, FRESH WHOLE FROM NORWAY**



Source: European Commission (updated 17.07.2019).

For **frozen fillets of Alaska pollock** (*Theragra chalcogramma*, CN code 03047500) imported from **China**, the price in **week 27** fell significantly to 2,47 EUR/kg, or 8% below the preceding four-week average of 2,68 EUR/kg, but 13% higher than the price of 2,18 EUR/kg in the same week of 2018. Volume totalled 2.257 tonnes, which was down by 36% from the average during the previous four weeks and down by 10% from a year earlier. This decreased supply to Europe is consistent with reports of rising domestic demand in China, which would be expected to reduce exports.

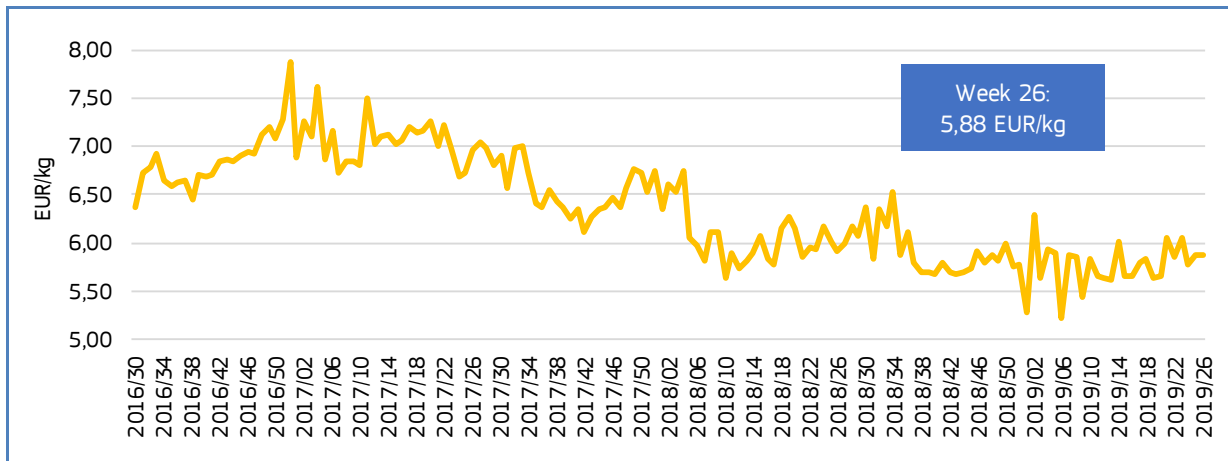
Figure 31. **IMPORT PRICE OF ALASKA POLLOCK, FROZEN FILLETS FROM CHINA**



Source: European Commission (updated 17.07.2019).

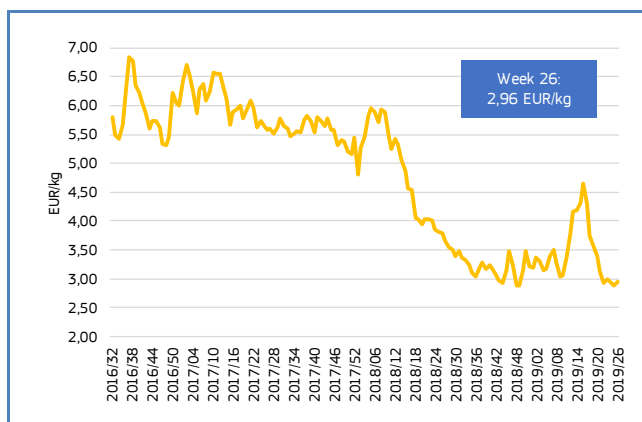
The price of **frozen tropical shrimp** (*genus Penaeus*, CN code 03061792) from **Ecuador** was 5,88 EUR/kg in **week 26**, down slightly (0,3%) from the average of 5,89 EUR/kg during the preceding four weeks and down by 0,6% from the same week in 2018. Volume of 1.502 tonnes in week 26 was down significantly (18%) from the previous four-week average, but not unusually for this product, which has a highly variable supply. Ecuador's production continues to rise and is mostly exported to Asian markets.

Figure 32. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR**



Source: European Commission (updated 17.07.2019).

Figure 33. **IMPORT PRICE OF FRESH FILLETS OF NILE PERCH FROM UGANDA**

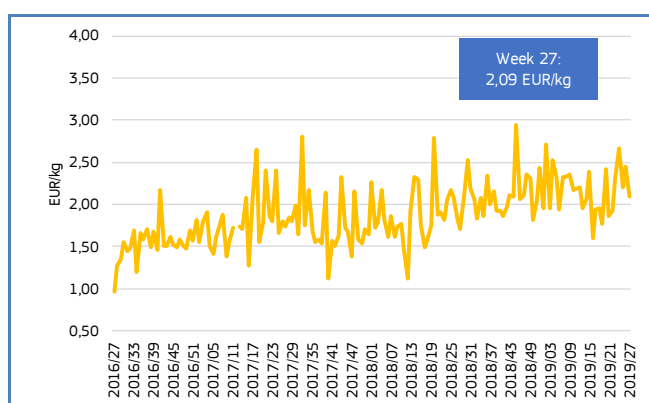


Source: European Commission (updated 17.07.2019).

For **fresh fillets of Nile perch** (*Lates niloticus*, CN code 03043300) from **Uganda**, the price in **week 26** was 2,96 EUR/kg, up slightly (+0,8%) from the preceding four-week average of 2,93 EUR/kg, but down significantly by 22% from the price of 3,78 EUR/kg in the same week in 2018. This price is closely linked with volume: short-run changes such as the recent peak of 4,65 EUR/kg in week 16 are correlated with short-run volume changes, and the broader decline in price since February 2018 is correlated with a general increase in imported volume during the period. Italy and to lesser extent Belgium were mostly responsible for the increased EU imports.

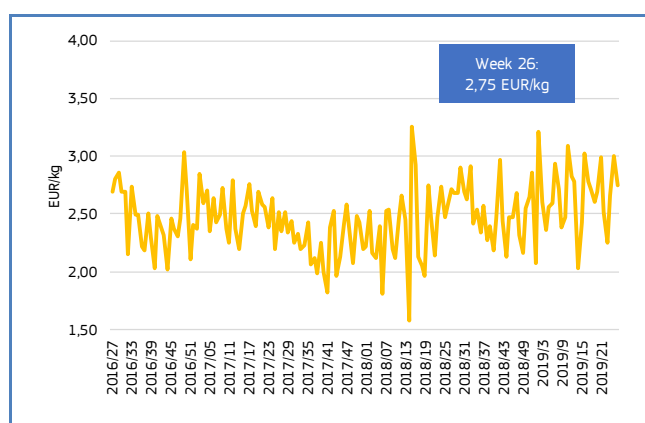
The price of **frozen whole catfish** (*Pangasius* spp., *Silurus* spp., *Clarias* spp., *Ictalurus* spp., CN code 03032400) from **Vietnam** fell to 2,09 EUR/kg in **week 27**, 13% below the preceding four-week average of 2,41 EUR/kg but 14% above the price of 1,83 EUR/kg a year earlier. Volume in week 27 was down sharply (-68%) from the four-week average and 53% below the volume in week 27 of 2018. This price is highly volatile on a week-to-week basis but shows a clear long-run upward trend. Volume shows a less clear but apparent long-run downward trend.

Figure 34. **IMPORT PRICE OF FROZEN WHOLE CATFISH FROM VIETNAM**



Source: European Commission (updated 17.07.2019).

Figure 35. **IMPORT PRICE OF FROZEN FILLETS OF TILAPIA FROM CHINA**

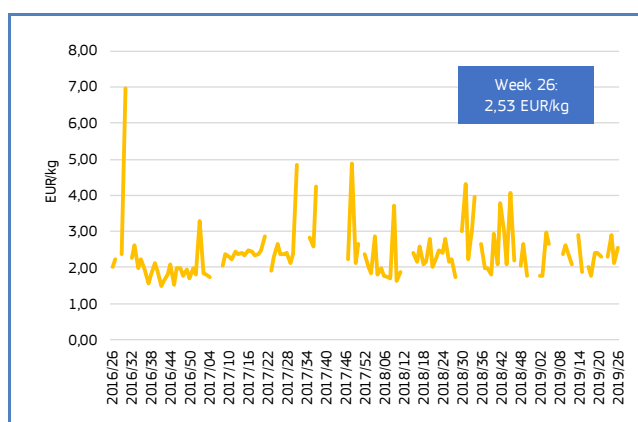


Source: European Commission (updated 17.07.2019).

The price of **frozen whole yellowfin tuna** (*Thunnus albacares*, CN code 03034290, other excluding 0303 42 20, edible fish offal of subheadings 0303 91 to 030399,) from **Seychelles** was 2,53 EUR/kg in **week 26**, up by 4% from the previous four-week average of 2,44 EUR/kg and 17% over the price in the same week of 2018. This is an irregularly supplied product, with many gaps, and weeks of very low supply, reflected in some very large swings in price. This product's CN definition excludes frozen yellowfin "for the industrial manufacture of products of heading 1604" (tuna in airtight containers), and so does not include frozen yellowfin tuna imported by EU tuna canneries.

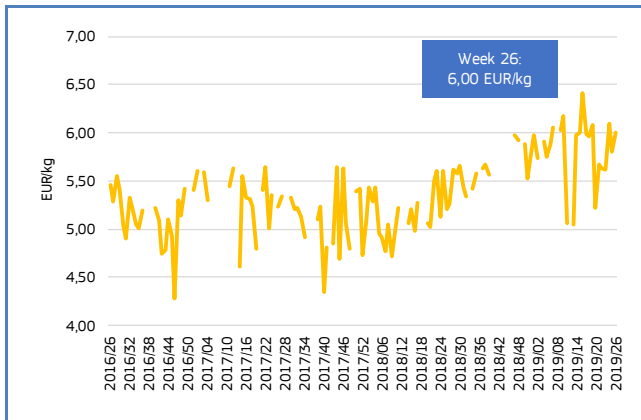
For **frozen fillets of tilapia** (*Oreochromis* spp., CN code 03046100) from **China** the price in **week 26** of 2,75 EUR/kg dropped from the previous week but remained 6% above the preceding four-week average price of 2,60 EUR/kg. Volume of 142 tonnes in week 26 was much lower (44%) than the four-week average volume of 255 tonnes, and 19% below the volume a year earlier. This product's price has risen irregularly since week 41 of 2017 (commencing on October 9th), while imported volumes declined much more irregularly during the same period.

Figure 36. **IMPORT PRICE OF FROZEN WHOLE YELLOWFIN TUNA FROM SEYCHELLES**



Source: European Commission (updated 17.07.2019).

Figure 37. **IMPORT PRICE OF FROZEN WHOLE SWORDFISH FROM CHINA**

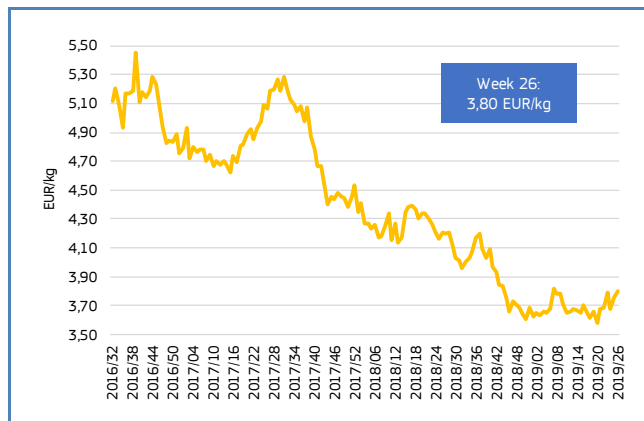


Source: European Commission (updated 17.07.2019).

The price of **frozen whole swordfish** (*Xiphias gladius*, CN code 03035700) from **China** rose in **week 26** to 6,00 EUR/kg, an increase of 4% over the preceding four-week average of 5,79 EUR/kg and 15% above the price of 5,21 EUR/kg a year earlier. Volume of 24 tonnes in week 26 was 48% lower than the four-week average and 75% lower than in week 26 of 2018. This price has been rising irregularly since week 40 of 2017.

The price for **fresh whole European seabass** (*Dicentrarchus labrax*, CN code 03028410) from **Turkey** rose to 3,80 EUR/kg in **week 26**. This was an increase of 2% over the four-week average price of 3,73 EUR/kg, but 10% below the 4,21 EUR/kg price a year earlier. Volume of 585 tonnes was 13% above the four-week average and 12% about the level a year ago. This product's price and volume have very little weekly volatility, but both show a clear trend over the three years under review, with volume continuing to rise as price continues to fall.

Figure 38. **IMPORT PRICE OF FRESH WHOLE EUROPEAN SEA BASS FROM TURKEY**



Source: European Commission (updated 17.07.2019).

## 3 Consumption

### 3.1. HOUSEHOLD CONSUMPTION IN THE EU

In May 2019, consumption of fresh fisheries and aquaculture products increased in value in most of the surveyed Member States compared with May 2018. Only in the Netherlands value decreased by EUR 720.000 or 2%. The largest increases in value occurred in Hungary (41%) and Portugal (34%) or by EUR 640.000 and EUR 8,32 million, respectively. Portugal also registered the highest increase in volume (38%, or 1.445 tonnes) followed by Sweden (22%, or 114 tonnes). This was mainly due to a higher consumption of octopus, salmon and European seabass in Portugal, and halibut, herring and salmon in Sweden. France, Germany, and Spain registered a decrease in consumption, while in the Netherlands consumed volumes remained unchanged. In the rest of the Member States surveyed consumption volume increased.

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

Country	Per capita consumption 2016* (live weight equivalent) kg/capita/year	May 2017		May 2018		April 2019		May 2019		Change from May 2018 to May 2019	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	24,7	500	8,05	497	7,40	714	11,86	511	8,21	3%	11%
France	32,9	14.607	176,28	14.270	169,95	15.720	193,80	14.145	193,74	1%	14%
Germany	13,9	4.047	59,55	4.251	62,31	5.761	88,17	4.117	64,71	3%	4%
Hungary	5,2	196	0,99	302	1,58	422	2,17	329	2,22	9%	41%
Ireland	23,0	934	13,10	920	13,08	1.969	16,22	958	14,23	4%	9%
Italy	31,1	25.437	247,91	24.971	246,83	24.567	251,21	26.171	263,69	5%	7%
Netherlands	21,0	2.054	34,25	2.086	35,62	2.232	39,08	2.077	34,90	0%	2%
Poland	14,5	3.387	19,60	2.884	17,58	3.870	25,75	3.124	20,43	8%	16%
Portugal	57,0	4.053	25,84	3.810	24,25	4.259	27,94	5.255	32,57	38%	34%
Spain	45,7	49.206	370,30	50.775	380,69	48.835	379,51	50.336	403,61	1%	6%
Sweden	26,4	516	7,69	521	7,24	946	11,84	635	8,14	22%	12%
UK	23,7	4.247	68,76	4.672	76,25	3.989	63,42	5.593	84,08	20%	10%

Source: EUMOFA, based on Europanel (updated 18.07.2019).

\*Data on per capita consumption of all fish and seafood products for all EU Member States can be found at:

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

For the past three years, household consumption of fresh fisheries and aquaculture products in the month of May has been below the annual volume average in most of the Member States surveyed, except Germany and the UK.

In terms of value, there was a similar trend. Consumption value in May in recent years has been below annual averages in most of the Member States with the exception of Spain and the UK.

The most recent weekly consumption data (up to week 30-2019) available in EUMOFA can be accessed [here](#).

## 3.2. Fresh saithe

**Habitat:** A dark coloured marine species found in inshore and offshore waters to about depth of 200 m<sup>12</sup>.

**Catch area:** Northern Atlantic from the Barents Sea and Spitsbergen, south through the English Channel to the Bay of Biscay. It is also commonly found around Iceland and Greenland<sup>13</sup>.

**Main producing countries in the EU:** France, the UK, Germany, Denmark, and Sweden.

**Production method:** Caught.

**Main consumers in the EU:** France, Germany, Denmark, Belgium, and the UK.

**Presentation:** Whole, fillets, loins.

**Preservation:** Fresh, frozen, dried-salted, smoked, and canned<sup>14</sup>.

**Ways of preparation:** Steamed, fried (plain, breaded or battered), baked or boiled.



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

In 2016, per capita consumption of fisheries and aquaculture products in France, at 32,9 kg, was among the highest in the EU, although declining by 1% from 2015. Compared to the EU average per capita consumption of 24,3 kg, French consumption was 35% higher. However, it was 42% lower than in Portugal, whose per capita consumption of 57,0 kg was the highest in the EU.

In Ireland, per capita consumption was 23,0 kg, 5% lower than the EU average. However, it increased by 5% over the previous year. See more on per capita consumption in the EU in table 3.

In both Member States, prices decreased and volumes increased over the period. On average, prices in Ireland were 2% higher than in France.

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

**First sales:** Denmark (6/2019, 2/2016, 3/2015, June 2013), France (6/2019), Norway (5/2014), Sweden (6/2016, 7/2015), the UK (6/2019, 1/2014).

**Extra-EU Import:** Iceland (2/2018).

**Consumption:** France (4/2017).

**Topic of the month:** Saithe fresh fillet in France (1/2019).

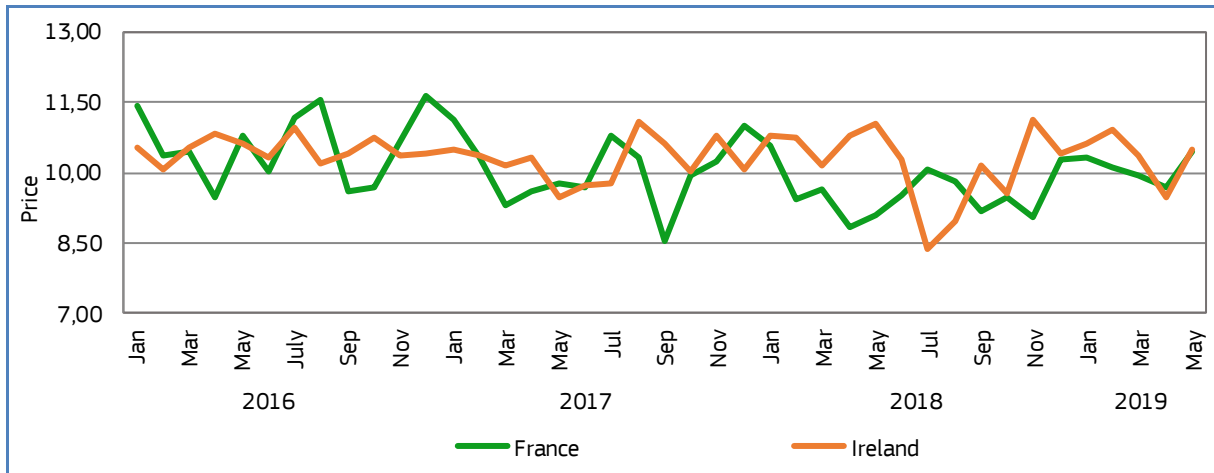
<sup>12</sup> <http://www.fao.org/fishery/species/3016/en>

<sup>13</sup> See footnote 12.

<sup>14</sup> <https://www.fishbase.in/Summary/SpeciesSummary.php?ID=1343&AT=saithe>

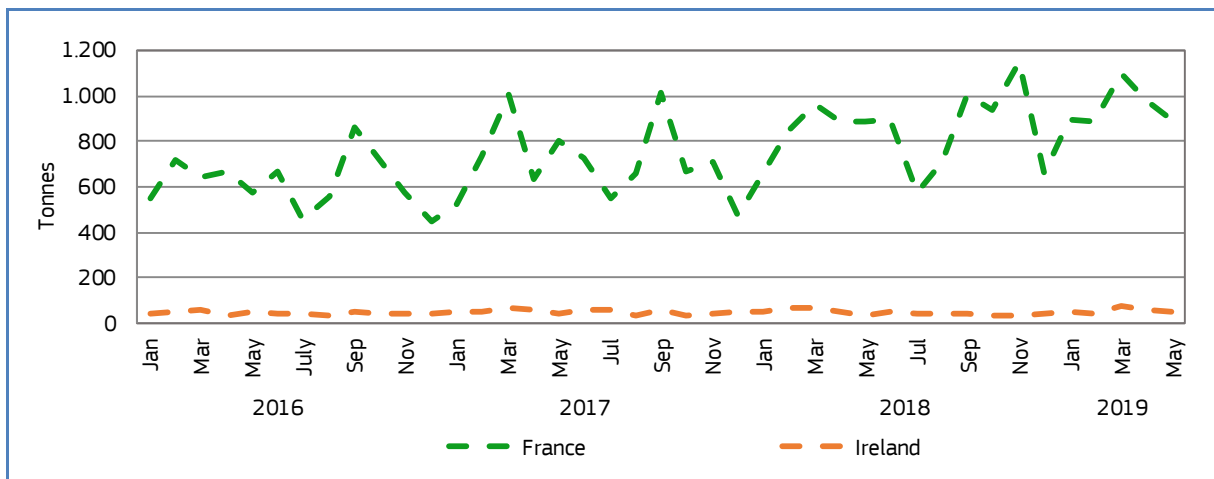


Figure 39. **RETAIL PRICES OF FRESH SAITHE PURCHASED BY HOUSEHOLDS**



Source: EUMOFA, based on Europanel (updated 18.07.2019).

Figure 40. **HOUSEHOLD PURCHASES OF FRESH SAITHE**



Source: EUMOFA based on Europanel (updated 18.07.2019).

### 3.2.2 Consumption trend in France

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

**Yearly average price:** 10,57 EUR/kg (2016), 10,06 EUR/kg (2017), 9,58 EUR/kg (2018).

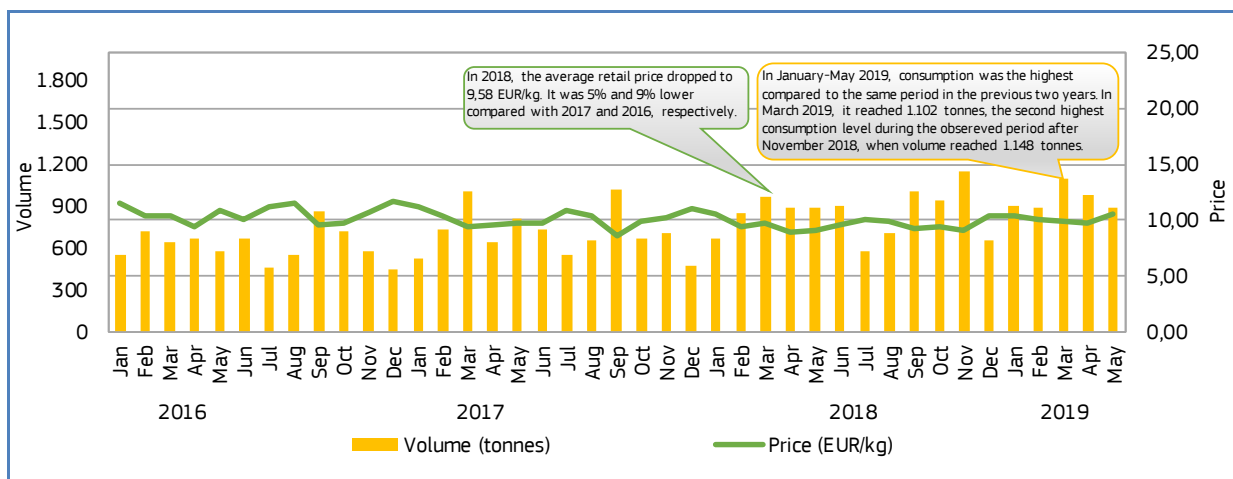
**Yearly consumption:** 7.427 tonnes (2016), 8.503 tonnes (2017), 10.188 tonnes (2018).

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

**Average price:** 10,10 EUR/kg.

**Consumption:** 4.763 tonnes.

Figure 41. RETAIL PRICE AND VOLUME OF FRESH SAITHE PURCHASED BY HOUSEHOLDS IN FRANCE



Source: EUMOFA, based on Europanel (updated 18.07.2019).

### 3.2.3 Consumption trend in Ireland

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

**Yearly average price:** 10,50 EUR/kg (2016), 10,24 EUR/kg (2017), 10,20 EUR/kg (2018).

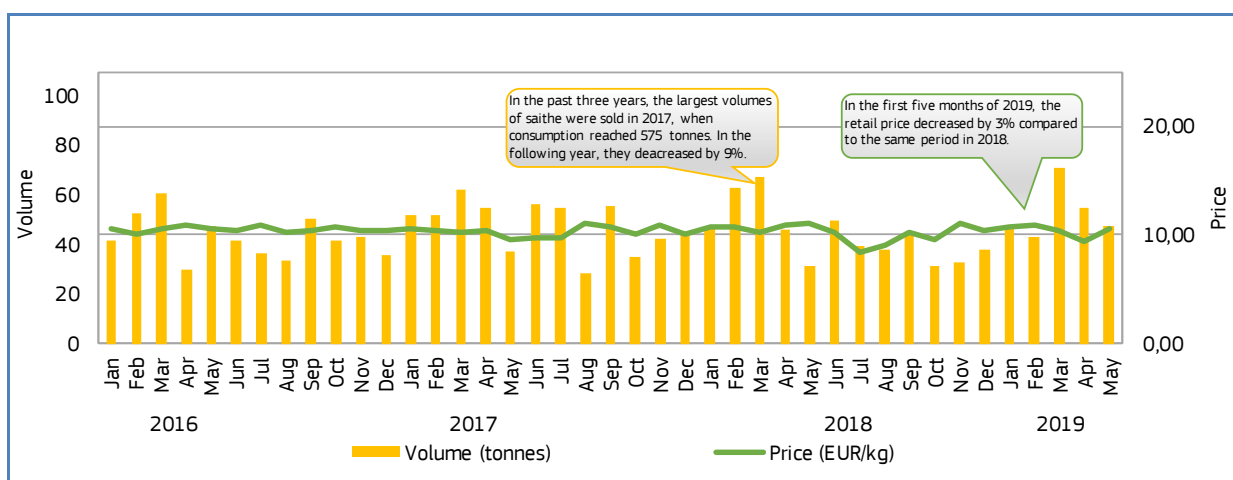
**Yearly consumption:** 515 tonnes (2016), 575 tonnes (2017), 528 tonnes (2018).

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

**Average price:** 10,38 EUR/kg.

**Consumption:** 263 tonnes.

Figure 42. RETAIL PRICE AND VOLUME OF FRESH SAITHE PURCHASED BY HOUSEHOLDS IN IRELAND



Source: EUMOFA, based on Europanel (updated 18.07.2019).

## 4 Case study – First sales of European hake in major places of sale

European hake (*Merluccius merluccius*) is one of the major commercial species in the EU. In 2016, it ranked first among all species landed in the EU in value terms, reaching EUR 500 million. In terms of first sale, Hanstholm in Denmark, St Jean-de-Luz in France and Pasajes in Spain are among the most important first sale places for hake in Europe. There are significant differences between first sales prices between these auctions. In 2018, while gutted hake was sold at around 3,00 EUR/kg in Hanstholm and St Jean-De-Luz, it was sold at 5,00 EUR/Kg in Pasajes. In addition to the place of sale, the main factors affecting hake first-sale prices are supply volume, size, fishing gear used (longline or trawl) and seasonality.



### 4.1 EU hake fisheries and markets

European hake is commonly caught in the Northeast Atlantic, and to a lesser extent in the Mediterranean Sea, in the Black Sea and in the Eastern Central Atlantic. The world production of European hake concentrates in France, Spain, the UK, Italy, Denmark and Ireland. Catches in these countries represent 84% of worldwide catches and 89% of European catches<sup>15</sup>. The EU, especially Spain, constitutes the major market for hake in the world, importing around 700.000 tonnes annually.

In European waters, European hake is one of the most important demersal fish stocks. Two main fishing gears are used for hake, long-line and trawl (for mixed fisheries<sup>16</sup>). The main source of supply in volume in the EU is the trawl hake, but longline hake is more traditional.

There are two stocks of hake in the EU waters: the northern stock, which is found in the North Sea, Denmark's Skagerrak and off the Atlantic coasts of the UK, Ireland and France. The southern stock is located off the Atlantic coasts of Spain and Portugal. Both stocks have benefitted from management measures and recovery plans<sup>17</sup> including the establishment of Total Allowable Catches (TACs). After a decrease of TACs between 2005 and 2007, fishing opportunities for European hake started to increase again after 2010, benefitting France mainly, which increased significantly its catches.

With 35% of the total EU landings of hake in 2017, Spain ranked first at EU level. In 2018, it was mainly sold in Pasajes where 24% of Spanish first sales occur, followed by Burela (20%) and Cillero (18%). France ranked 4<sup>th</sup> in terms of landings with 12% of the EU hake landings in 2017. In 2018, St Jean-de-Luz was the most important first sales place of hake with 33% of French first sales volume, followed by Lorient (17%) and Les Sables-d'Olonne (12%). As for Denmark, it ranked 6<sup>th</sup> at EU level with 5% of the total EU landings of hake. Hanstholm and Thyboron are by far the most important Danish first-sales places, with 54% and 38%, respectively, of total Danish first-sales volume of hake in 2018. In the context of this case study, the focus is made on three of the main first sale places, namely:

- **Pasajes fish auction in Spain:** Pasajes is the 2<sup>nd</sup> largest auction in Spain in terms of value and the 5<sup>th</sup> in terms of volume, with a turnover of circa EUR 77 million for 19.329 tonnes of fish sold in 2018. It is based in the Bay of Biscay on the northeast coast of Spain.
- **St Jean-de-Luz fish auction in France** is the 7<sup>th</sup> largest auction in terms of value in France and the 10<sup>th</sup> in terms of volume, with a turnover of almost EUR 27 million for about 8.000 tonnes of fish sold in 2018.

<sup>15</sup> Data from FAO statistics.

<sup>16</sup> Fisheries targeting multiple species.

<sup>17</sup> For the Northern hake stock: Council Regulation (EC) No 2166/2005 of 20 December 2005 establishing measures for the recovery of the Southern hake and Norway lobster stocks in the Cantabrian Sea and Western Iberian peninsula; for the Southern hake stock: Council Regulation (EC) No 811/2004 of 21 April 2004 establishing measures for the recovery of the Northern hake stock.

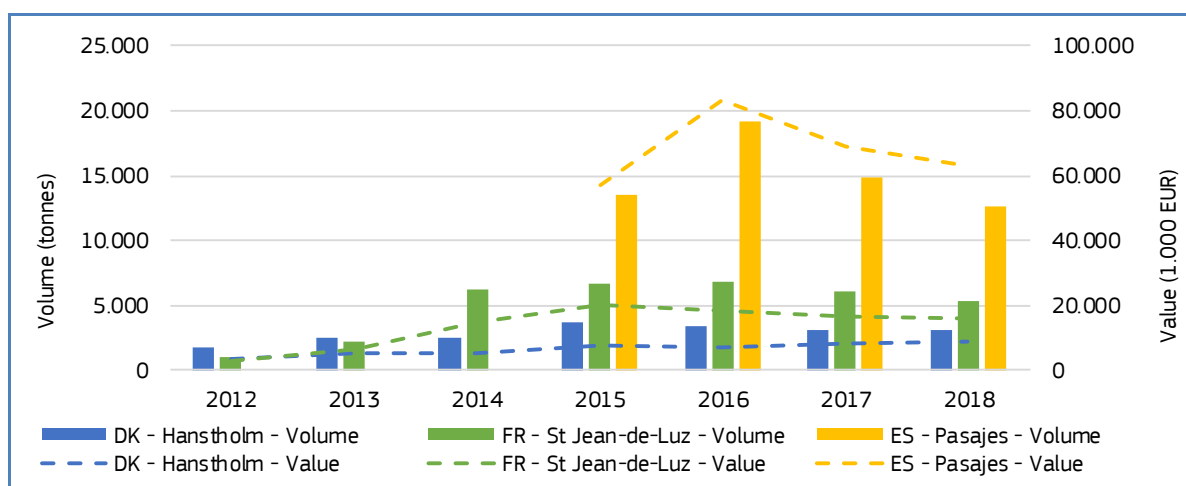
St Jean-de-Luz is located in the Bay of Biscay in the southwest of France. About 208 vessels<sup>18</sup> land their catches in St Jean-de-Luz.

- **Hanstholm fish auction in Denmark:** based in the northwest of Denmark, Hanstholm is the largest auction in Denmark in terms of value and the 3rd auction in terms of volume with a turnover of almost EUR 83 million for over 37.000 tonnes of fish sold in 2018.

## 4.2 First sales of hake in Pasajes, St Jean-de-Luz and Hanstholm

The highest first sales volume of hake is recorded in Pasajes (Spain) with almost 15.000 tonnes in 2017, followed by St Jean-de-Luz with more than 6.000 tonnes and Hanstholm with 3.000 tonnes in the same year.

Figure 43. **FIRST SALES OF HAKE IN THE MAJOR PLACE OF SALE PASAJES (ES), ST JEAN-DE-LUZ (FR) AND HANSTHOLM (DK)**



Source: EUMOFA.

In St Jean-de-Luz, first sales of hake have experienced a significant increase over the 2012–2018 period, and since 2014 St Jean de-Luz became the second place of sale of hake among the three auctions after Pasajes with more than double of Hanstholm's first sales of hake in 2014–2017. During the period between 2012 and 2018, first sales of hake in the French auction grew from 1.046 tonnes to 5.264 tonnes (+403%). This trend is also seen at national level in France where landings increased by 22% during the same period, which is related to the increase of TAC since 2010. This increasing trend is also seen in Hanstholm, but to a lesser extent (+79% in volume and +147% in value), even though the increase of landings at national level is more significant than in France (+118% between 2012 and 2016). This resulted in an increase of hake first sales in the second major first-sales place in Denmark (Thyboron), from 600 tonnes to circa 2.000 tonnes between 2012 and 2018.

In 2018, first sales of hake in Pasajes (about 12.700 tonnes) represented more than the double of sales volume in St Jean-de-Luz (circa 5.300 tonnes) and more than four times the sales volume in Hanstholm (3.200 tonnes). During the period between 2015 and 2018, first sales increased to reach a peak in volume and value in 2016, and then decreased in 2017 and 2018, even though landings volumes at national level have increased by +11% during the same period. The analysis of first sale data indicates that hake is landed in various first-sales places and that there is no clear shift of first sales from Pasajes to another auction.

<sup>18</sup> <http://www.criee64.fr>

### 4.3 Analysis by presentation state and size

The most common presentation state sold in the three auctions is gutted fish. However, while all first sales of hake are only gutted fish in Hanstholm, other presentation states are sold in smaller volumes in Pasajes and in St Jean-de-Luz. Roes and other presentation states (which are not specified in the auction's statistics) can be found in both auctions, and gutted and headed fish, headed fish, whole fish and tails in Pasajes.

Table 4. **FIRST SALES OF HAKE BY PRESENTATION STATE IN THE MAJOR PLACES OF SALE IN 2018**

Place of sale	Presentation states	Volume (tonnes)	Value (EUR 1.000)	% Volume	% Value
<b>DK - Hanstholm</b>	Gutted	3.127	8.875	100%	100%
	<b>Total</b>	<b>3.127</b>	<b>8.875</b>	<b>100%</b>	<b>100%</b>
<b>ES - Pasajes</b>	Gutted and headed	61	242	0,50%	0,50%
	Gutted	12.159	60.913	96%	96%
	Headed	2	7	0%	0%
	Roes	183	452	1,50%	0,50%
	Tail	234	1.517	2%	2%
	Whole	7	15	0%	0%
	Other	2	90	0%	0%
	<b>Total</b>	<b>12.649</b>	<b>63.249</b>	<b>100%</b>	<b>100%</b>
<b>FR - St Jean-de-Luz</b>	Gutted	5.262	15.674	100%	100%
	Roes	2	9	0%	0%
	Other	1	19	0%	0%
	<b>Total</b>	<b>5.264</b>	<b>15.702</b>	<b>100%</b>	<b>100%</b>

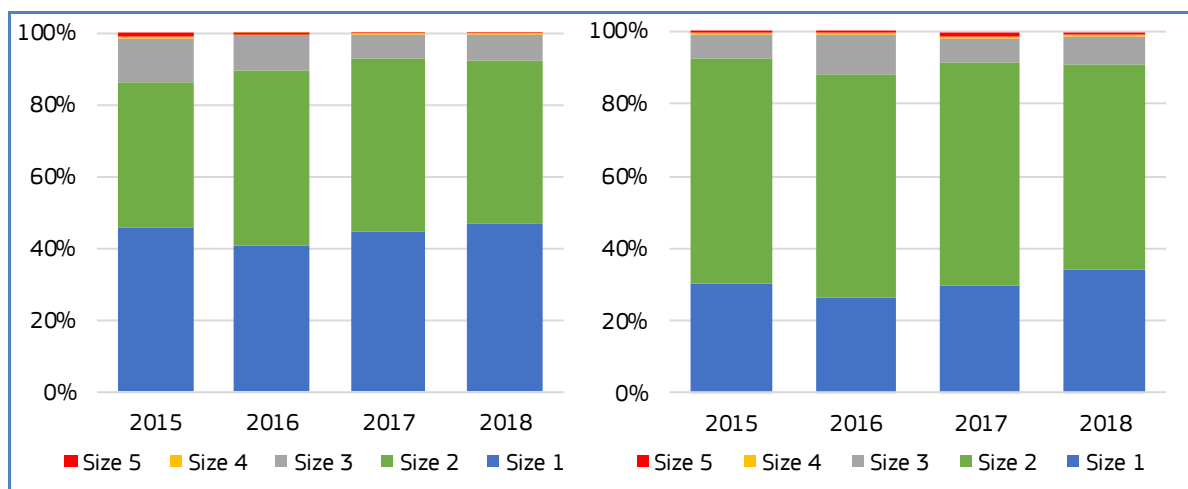
Source: EUMOFA.

Marketing of hake in Europe is regulated by marketing standards that establish size and freshness grades<sup>19</sup>. Specifically, marketing standards for fresh hake establish the following five size grades used by European auctions recording their sales' statistics:

- Size grade 1: 2,50 Kg and over;
- Size grade 2: 1,20 to 2,50 Kg;
- Size grade 3: 0,60 to 1,20 Kg;
- Size grade 4: 0,28 to 0,60 Kg;
- Size grade 5: 0,20 to 0,28 Kg.

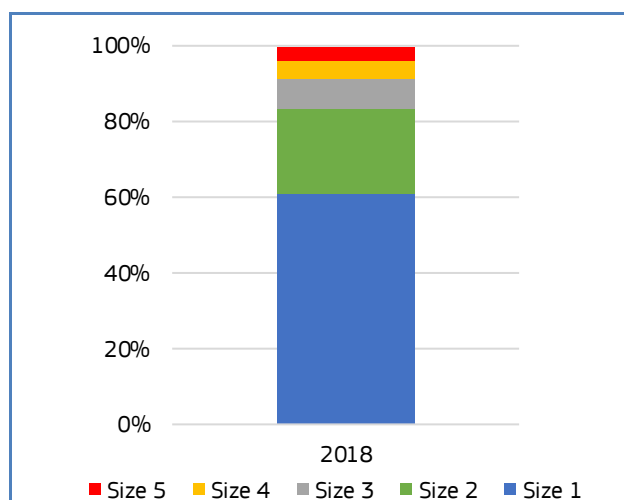
<sup>19</sup> Council Regulation (EC) No 2406/96 of 26 November 1996 laying down common marketing standards for certain fishery products  
<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A31996R2406>

Figure 44. **BREAKDOWN OF FIRST SALES OF HAKE BY SIZE IN HANSTHOLM (LEFT), ST JEAN-DE-LUZ (RIGHT)**



Source: EUMOFA.

Figure 45. **BREAKDOWN OF FIRST SALES OF HAKE BY SIZE IN PASAJES\***



\*Breakdown of first sales by size in Pasajes is only available for 2018.

Source: EUMOFA.

Data indicate that the sales of hake with greater sizes are more significant. In 2018, sales of hake of size grades 1 and 2 represented 47% and 45%, respectively, of sales in Hanstholm, 34% and 57% of sales in St Jean-de-Luz and 60% and 23% in Pasajes. The smallest size grades (sizes 4 and 5) represented less than 1% of hake sales in the French and Danish auctions and less than 10% in the Spanish auction. In addition, over the period between 2015 and 2018, there is a clear increasing trend of sales of the largest hake (i.e. size grades 1 and 2) in Hanstholm. In St Jean-de-Luz, these proportions remained relatively stable during the same period.

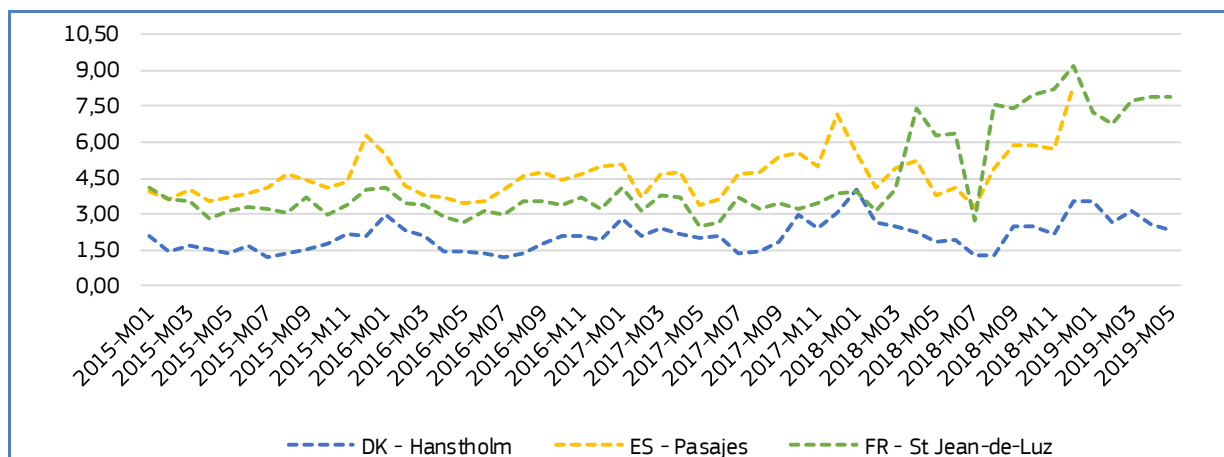
A case study analysing price structure in the supply chain of fresh hake in Spain<sup>20</sup> indicated that the Spanish market distinguishes two types of hake according to its size: *pescaquilla* (0,50 to 1,50 kg, usually above 1,00 kg) and *merluza* (> 1,50 kg). It also indicates that consumer preferences to either *pescaquilla* or *merluza* vary according to regions and traditions, without indicating which product is more important at first sale stage.

<sup>20</sup> [https://www.eumofa.eu/documents/20178/65201/Case+Study+report+Hake\\_EN.pdf](https://www.eumofa.eu/documents/20178/65201/Case+Study+report+Hake_EN.pdf)

## 4.4 Price trends

There are significant differences of first-sales prices between auctions. Indeed, in 2018, while gutted hake was sold at around 3,00 EUR/Kg in Hansthholm and St Jean-De-Luz, it was sold at 5,00 EUR/Kg in Pasajes. Moreover, while the annual average first-sales price of hake increased significantly in St Jean-de-Luz by 82% between 2015 and 2018, they have known a more moderate growth in Hansthholm (+43%) and in Pasajes (+22%).

Figure 46. MONTHLY FIRST SALES PRICES IN THE THREE SELECTED AUCTIONS



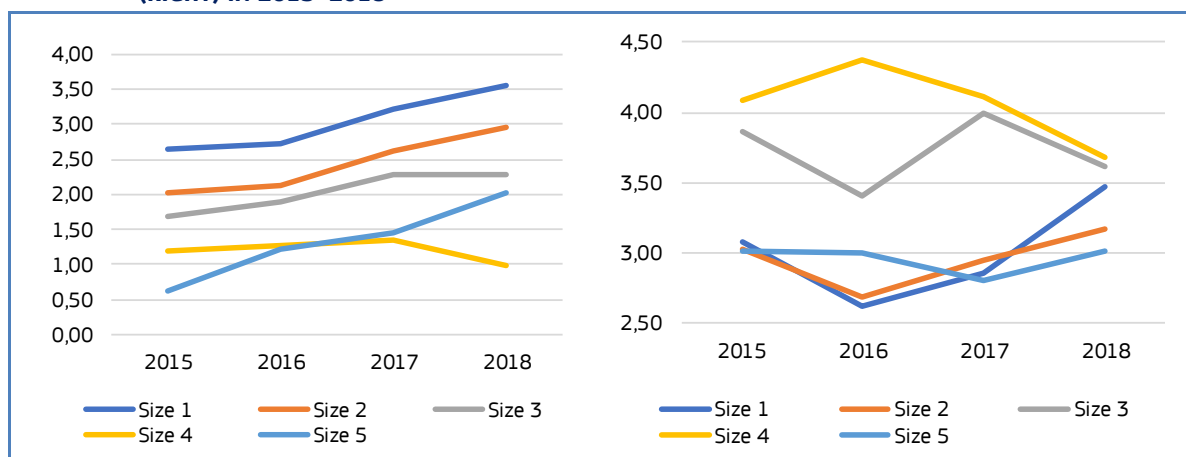
Source: EUMOFA.

Monthly first-sales prices of hake vary significantly between the three auctions. During the period between 2015 and mid-2019, hake was sold on average at about 4,40 EUR/kg in St Jean-de-Luz and Pasajes, but its price was half the price in Hansthholm (2,09 EUR/kg). Prices fluctuated significantly throughout the year and from one year to another. At least two factors affect price:

**First-sales volume:** the analysis of first-sales prices according to landing volumes indicates that first sales prices vary according to first-sales volumes and that the drop of volumes sold usually result in higher prices.

**Fish size:** first-sales prices of fresh hake in the three auctions vary according to size grades. This is particularly significant in Hansthholm, where the smallest hake (size 5) is sold 43% cheaper than the biggest hake (size 1). In St Jean-de-Luz, first-sales prices of the smallest hake (size grades 3, 4 and 5) were higher than first-sales prices of the biggest hake (size grades 1 and 2), which is likely to be related to the fact that the smallest hake is sold to different market, namely the Spanish market (prices of the smallest hake can be sold between 4,00 and 6,00 EUR/Kg in Spain). However, between 2015 and 2018, first-sales prices of the smallest hake decreased, while those of the biggest hake increased. According to the case study “Analysing price structure in the supply chain for fresh hake in Spain,” the main segmentation for fresh hake is based on its size, and *merluza* (> 1,50 Kg) tends to be considered more of a premium product throughout the value chain while *pescadilla* (0,50 to 1,50 kg) is more of a standard product sold at a cheaper price than the premium product.

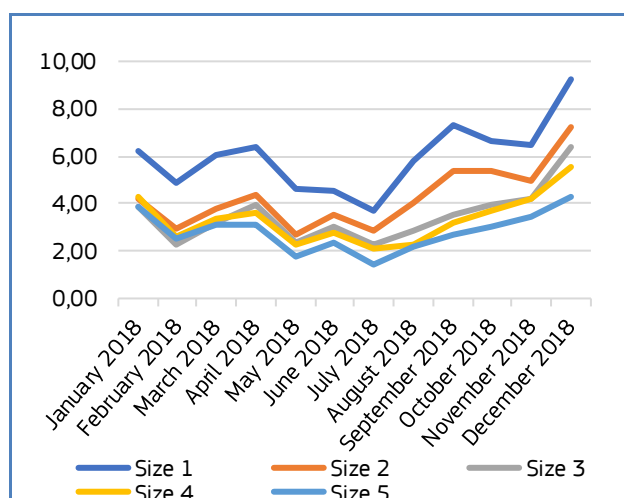
Figure 47. FIRST-SALES PRICES OF HAKE BY SIZE GRADE IN HANSTHOLM (LEFT) AND ST JEAN-DE-LUZ (RIGHT) IN 2015–2018



Source: EUMOFA.



Figure 48. **FIRST-SALES PRICES OF HAKE BY SIZE GRADE IN PASAJES (2018)**



Source: EUMOFA.

**Presentation state:** There are significant differences between first-sales prices according to the presentation state. For instance, in St Jean-de-Luz, while gutted hake is sold at 2,98 EUR/kg, roes are sold at 4,41 EUR/kg.

Table 5. **FIRST-SALES PRICES BY PRESENTATION STATE IN HANSTHOLM (DK), ST JEAN-DE-LUZ (FR) AND PASAJES (ES) IN 2018**

Place of sale	Presentation states	Price (EUR/kg)	Volume (tonnes)
<b>DK - Hanstholm</b>	Gutted	2,84	3.127
	<b>Total</b>	<b>2,84</b>	<b>3.127</b>
<b>ES - Pasajes</b>	Gutted and headed	3,97	61
	Gutted	5,01	12.159
	Headed	3,86	2
	Roes	2,47	183
	Tail	6,48	234
	Whole	2,19	7
	Other	45,20	2
	<b>Total</b>	<b>5,00</b>	<b>12.649</b>
<b>FR - St Jean-de-Luz</b>	Gutted	2,98	5.262
	Roes	4,41	2
	Other	30,80	1
	<b>Total</b>	<b>2,98</b>	<b>5.264</b>

Source: EUMOFA.

**Fishing gear:** in Spain (not specifically in Pasajes), the case study on price structure in the supply chain of fresh hake shows that long-line hake is considered of a better quality and can be sold at a higher price than trawler hake. Also, longline hake tends to behave more as a premium product (it gets a higher price), while trawler hake behaves as a standard product.

**Seasonality:** monthly prices reach a peak each year, coinciding with the increase of demand occurring during the Christmas season.

## 5 Case study – Fisheries and aquaculture in the United States

The United States of America has a long coastline with the Pacific Ocean to the west, the Atlantic Ocean to the east and the Gulf of Mexico to the south. With Alaska, the northernmost state, it also accesses the Bering Sea and Arctic Sea.

The population today is approximately 327 million, an increase of 45 million since 2000<sup>21</sup>. This makes the United States the third most populous country after China and India. The US population is also smaller than for the European Union, which have 508 million inhabitants<sup>22</sup>.



Source: <https://www.worldatlas.com/maps/united-states.html>

The US is one of the largest fisheries nations with a total catch of 5 million tonnes and aquaculture production at 440.000 tonnes in 2017. In 2016, the seafood industry supported 1,7 million jobs, and contributed USD 212 billion in sales (EUR 190 billion)<sup>23</sup>. The most important state for fisheries in the US is Alaska, producing more than half the fish caught in water off the US coast. Other important states are Massachusetts on the east coast, Louisiana in the south and Washington in the west. The US exclusive economic zone (EEZ) is the largest in the world, including eight marine ecosystems which give access to a vast variety of marine species. The EEZ includes waters off US territories such as Puerto Rico in the Caribbean, and Guam in the Pacific.

Recreational fisheries also play a large role in the US economy. According to the National Oceanic Atmospheric Administration (NOAA), over 200 million marine recreational fishing trips were made in 2017, with a catch of over 1 billion fish, about 64% of them released live. The estimated total weight of landed catch (397 million individuals) was 203.000 tonnes. The majority of recreational fishing trips were taken on the Atlantic coast.

The US is the world's 4<sup>th</sup> largest exporter and the largest importer of seafood by value in 2016. While exports have remained relatively stable, seafood imports have tripled in the last 20 years to reach a total value of USD 20 billion (EUR 18 billion) in 2016<sup>24</sup>. NOAA estimates that the United States imports more than 80% of the seafood consumed in the country<sup>25</sup>. A growing portion of these imports is seafood caught by American fishermen, which is exported for processing and then reimported to the US<sup>26</sup>.

### 5.1 Fisheries

In 2017, US fishermen landed 4,5 million tonnes of fish and shellfish, while 2,7 million tonnes were imported into the US. The US fisheries harvest continued a positive trend in 2017, with a 3,6 % increase in volume and a 2,1% increase in value from 2016. The landed value reached USD 5,4 billion (EUR 4,8 billion) in 2017<sup>27</sup>. From 2000 to 2017, catches fluctuated between approximately 4,2 million and 5,1 million tonnes.

Alaska pollock is the most important species with a catch over 1,5 million tonnes in 2016 and 2017.

<sup>21</sup> U.S. census bureau, population division.

<sup>22</sup> [https://europa.eu/european-union/about-eu/figures/living\\_en](https://europa.eu/european-union/about-eu/figures/living_en)

<sup>23</sup> <https://www.fisheries.noaa.gov/content/fisheries-economics-united-states-2016>

<sup>24</sup> <http://www.fao.org/in-action/globefish/countries/countries/usa/usa-trade/en/>

<sup>25</sup> <https://www.fishwatch.gov/sustainable-seafood/the-global-picture>

<sup>26</sup> See footnote 25.

<sup>27</sup> <https://www.noaa.gov/media-release/american-seafood-industry-steadily-increases-its-footprint>

Table 6. **CATCHES IN THE UNITED STATES (volume in 1.000 tonnes)**

Group	2000	2005	2010	2015	2016	2017
Fish	3.601	3.883	3.246	4.131	4.017	4.153
Molluscs	746	656	694	506	505	542
Crustaceans	346	299	341	373	351	318
Inland-waters	33	23	23	20	24	17
Other	64	81	13	14	13	11
<b>Total</b>	<b>4.789</b>	<b>4.942</b>	<b>4.317</b>	<b>5.044</b>	<b>4.909</b>	<b>5.040</b>

Source: FAO Fishstat.

Table 7. **MAIN SPECIES CAUGHT IN THE UNITED STATES (volume in 1.000 tonnes)**

Specie	2000	2005	2010	2015	2016	2017
Alaska pollock	1.182	1.547	883	1.480	1.522	1.537
Gulf menhaden	591	370	439	539	619	461
North Pacific hake	205	258	161	151	253	351
Pacific cod	241	249	245	317	321	298
Pink salmon	94	224	169	276	59	225
American sea scallop	113	214	215	135	153	194
Atlantic menhaden	207	194	229	201	178	180
Skipjack tuna	97	43	192	226	171	160
Sockeye salmon	94	120	115	132	130	132
Yellowfin sole	70	85	113	123	131	129
Other	1.892	1.636	1.556	1.464	1.371	1.374
<b>Total</b>	<b>4.789</b>	<b>4.942</b>	<b>4.317</b>	<b>5.044</b>	<b>4.909</b>	<b>5.040</b>

Source: FAO Fishstat.

## 5.2 Aquaculture

The US aquaculture industry produced about USD 1,5 billion (EUR 1,35 billion) of seafood in 2016, around 21% of the value of total seafood production (fisheries and aquaculture). In 2017, aquaculture production in the country amounted to 440.000 tonnes, decreasing by 5.000 tonnes compared to 2016. The FAO reports that the US ranks 16<sup>th</sup> in the world in terms of aquaculture production in 2016<sup>28</sup>.

Channel catfish is the main cultured species, both in terms of volume and value. Most of the catfish production occurs in the states of Mississippi, Alabama, and Arkansas. The species is raised in earthen ponds filled with well water and fed a floating, grain-based diet<sup>29</sup>. Since the beginning of the century, US catfish producers have faced increased competition from imported catfish/pangasius from Vietnam. Since 2003, the US has imposed several measures limiting imports of low priced pangasius to the US market<sup>30</sup>.

Shellfish are also important. Combined, production of American cupped oyster, pacific cupped oyster and Northern quahog (a species of clam) accounted for 37% of US aquaculture production in 2017 in volume and 21% in value.

The production of Atlantic salmon decreased in recent years, reaching 14.685 tonnes in 2017. To meet domestic demand, the US imports large volumes of salmon from producing countries such as Canada, Chile, Norway and the UK. In recent

<sup>28</sup> FAO Fishstat, Global aquaculture production.

<sup>29</sup> <https://articles.extension.org/pages/58766/catfish-farming>

<sup>30</sup> <https://www.everycrsreport.com/reports/R44177.html#fn2>

years, an increasing negative focus on traditional in-sea aquaculture production of salmon has been observed. This has led to the development of new technology for land-based salmon aquaculture and several facilities are either under construction or being planned.

The farmed species with the highest value per kg are oysters, clams and salmon<sup>31</sup>.

Table 8. **AQUACULTURE PRODUCTION IN THE US (volume in tonnes, value in EUR)**

Specie	2015		2016		2017	
	Volume	Value	Volume	Value	Volume	Value
Channel catfish	143.992	347.021	145.230	363.075	149.881	355.218
American cupped oyster	93.697	93.697	113.335	126.935	112.408	124.773
Red swamp crawfish	63.690	199.350	67.592	196.693	63.626	189.605
Pacific cupped oyster	29.116	46.294	25.296	56.410	25.845	53.499
Northern quahog(Hard clam)	28.403	63.339	24.776	81.265	23.339	78.186
Rainbow trout	20.799	76.748	21.977	79.557	19.845	83.151
Atlantic salmon	18.719	76.186	16.185	67.653	14.685	61.383
Tilapia	8.618	42.745	8.618	42.745	8.618	42.745
Other	18.968	204.298	21.670	228.684	21.423	223.920
<b>Total</b>	<b>426.002</b>	<b>1.149.678</b>	<b>444.679</b>	<b>1.243.018</b>	<b>439.670</b>	<b>1.212.480</b>

Source: FAO Fishstat.

### 5.3 Processing

Primary processors generally convert whole fish into fillets, steaks or loins. Shellfish are processed by being cooked, or by removing their edible meat from the shell. The products are then packed and distributed as fresh refrigerated products, as frozen products, or destined to canning.

Secondary processors convert fresh or frozen fish and shellfish products and other ingredients into a final product to be sold in retail stores and restaurants. Examples of value-added finished seafood products include smoked seafood, sushi, salads and sandwiches.

The National Marine Fisheries Service estimates the value of the 2017 domestic production of edible and industrial processed fisheries products to be USD 12 billion (EUR 10,7 billion), a 10,8% increase from 2016<sup>32</sup>. Most of this production data refers to edible products (USD 11 billion or EUR 9,8 billion) while the value of industrial products processed from domestic catch and imported products was USD 903 million (EUR 805 million). Production of raw (uncooked) fish fillets and steaks, including blocks, is mainly from Alaska pollock, salmon, cod, hake, flounders, and haddock<sup>33</sup>.

Alaska and Washington are the largest states for processing of seafood, including 145 and 85 processing plants, respectively, in 2017. Other important seafood processing states are Louisiana (63 plants), Texas (51 plants) and Massachusetts (50 plants)<sup>34</sup>.

Of the total US catch, 79% is fresh or frozen food for human consumption, 14% goes to fishmeal and oil, 3% is canned human food, 3% is fresh/frozen animal food and 1% is cured human food<sup>35</sup>.

<sup>31</sup> <https://www.noaa.gov/media-release/american-seafood-industry-steadily-increases-its-footprint>

<sup>32</sup> Fisheries of the united states 2017, infographics - <https://www.fisheries.noaa.gov/resource/document/fisheries-united-states-2017-infographics>

<sup>33</sup> <https://www.seafoodhealthfacts.org/seafood-choices/overview-seafood-industry>

<sup>34</sup> Fisheries of the United states 2017 - <https://www.fisheries.noaa.gov/resource/document/fisheries-united-states-2017-report>

<sup>35</sup> See footnote 34.

In terms of value, the top processed species are Alaska pollock, shrimp, sockeye salmon, tuna, and cod. Frozen edible products stand for 62% of the total value of seafood products, fresh products for 18%, canned products for 10%, cured products for 2%, and industrial products for 8%.

## 5.4 Import – Export

It is estimated that more than 80% of seafood consumption in the US relies on imports. A large portion of the import is seafood caught by US fishermen which is exported for processing and then reimported back to the US<sup>36</sup>.

### Exports from the US

In 2018, the US exported fisheries and aquaculture products to 161 different countries, and 22 countries each imported more than 10.000 tonnes of seafood from the US.

Exports totalled 1.576 thousand tonnes in 2018. China was the largest destination, followed by the EU. The US exported 386.000 tonnes of fisheries and aquaculture products to China in 2018, a decrease from 473.000 tonnes exported in 2017. The bilateral trade tension between the United States and China is believed to be a key factor causing decrease in seafood imports to China from the United States<sup>37</sup>.

In terms of value, Canada is the most important destination for US exports, with a value just above EUR 1 billion in 2018, as it imports large volumes of high-valued species like salmon and lobster. By comparison, the export value to China was EUR 975 million in 2018 while that to the EU was EUR 370 million.

Table 9. **EXPORT OF FISHERIES AND AQUACULTURE PRODUCTS FROM THE US (volume in 1.000 tonnes)**

Country	2014	2015	2016	2017	2018
China	374	337	294	473	386
Japan	195	207	170	229	220
Canada	89	83	94	209	209
Korea	112	141	153	171	173
Netherlands	42	40	47	93	89
Germany	107	96	88	57	66
France	24	27	28	37	35
Denmark	4	5	4	33	32
Other	228	179	166	401	367
<b>Total</b>	<b>1.176</b>	<b>1.115</b>	<b>1.043</b>	<b>1.703</b>	<b>1.576</b>

Source: EUMOFA based on GTA.

<sup>36</sup> <https://www.fishwatch.gov/sustainable-seafood/the-global-picture>

<sup>37</sup> Record high seafood imports in 2018 - <https://www.fas.usda.gov/data/china-record-high-seafood-imports-2018>

Table 10. **MAIN COMMERCIAL SPECIES EXPORTED BY THE US (volume in 1.000 tonnes)**

Species	2014	2015	2016	2017	2018
Salmon	168	214	159	250	175
Alaska pollock	213	186	187	194	207
Hake	63	45	37	93	81
Cod	104	109	104	93	73
Lobster	-	-	-	48	52
Caviar, livers and roes	42	43	28	43	41
Herring	60	41	25	31	25
Crab	-	-	-	21	21
Other	527	477	502	930	901
<b>Total</b>	<b>1.176</b>	<b>1.115</b>	<b>1.043</b>	<b>1.703</b>	<b>1.576</b>

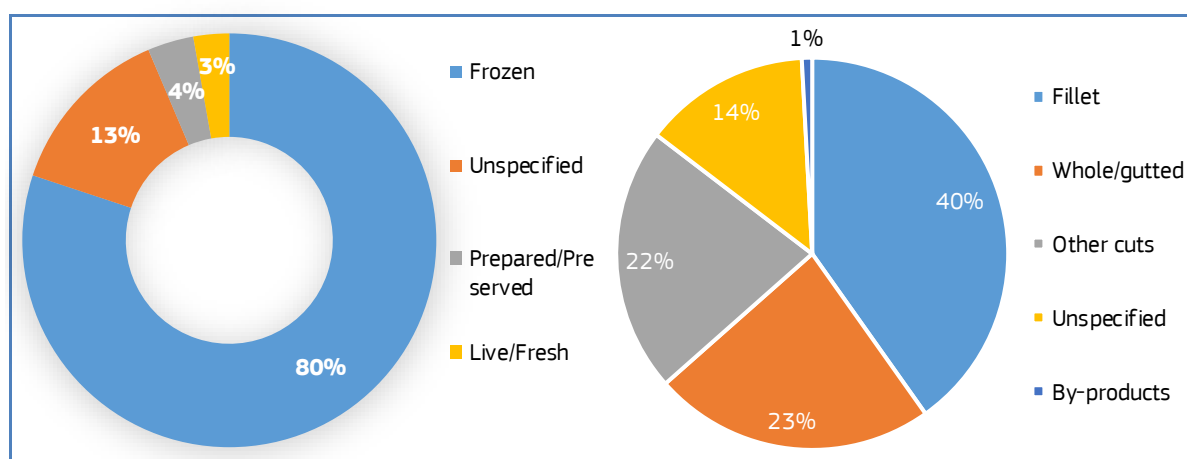
Source: EUMOFA.

### Exports from the US to the EU

In 2018, the US exported 308.000 tonnes of fisheries and aquaculture products to the EU. Approximately 89.000 tonnes entered the EU in the Netherlands, 65.000 tonnes in Germany and 35.000 tonnes in France. The main products exported to the EU are Alaska pollock (111.000 tonnes), salmon (37.000 tonnes) and hake (25.800 tonnes). Fish oil is another main product exported to the EU, amounting to 29.500 tonnes in 2017 and 26.200 tonnes in 2018, more than 90% of the total destined to Denmark.

In 2018, 90% of Alaska pollock originating from the US entered the EU market in the Netherlands and Germany. In terms of preservation states, 80% of the total consist of frozen products. In terms of presentation states, 40% of the total consist of fillets, while 23% are whole/gutted products.

Figure 49. **EXPORT OF FISHERIES AND AQUACULTURE PRODUCTS FROM THE US TO THE EU BY PRESERVATION (LEFT) AND PRESENTATION (RIGHT) STATES (volume in tonnes)**



Source: EUMOFA based on GTA.

## US imports from the EU

In 2018, the EU exported 96.000 tonnes of seafood to the US, for a value of EUR 635 million. Spain is the main US supplier, as it accounts for 24% of the volume and 27% of the value exported to the US from the EU. The UK's share was 18% in volume and 21% in value. While farmed Atlantic salmon is the main species imported in the US from the UK, Spain mainly provides the US with octopus, fishmeal and other crustaceans. From Poland, the US mainly imports miscellaneous small pelagic species.

From 2016 to 2018, US imports from the EU have increased by 30% in volume and by 27% in value. In particular, those from Spain have risen by 8.000 tonnes and EUR 72 million.

Table 11. **US IMPORTS FROM THE EU BY SPECIES (volume in 1.000 tonnes, value in million EUR)**

Species	2016		2017		2018	
	Volume	Value	Volume	Value	Volume	Value
Salmon	19	221	26	284	25	264
Miscellaneous small pelagics	10	33	12	37	10	42
Fishmeal	5	9	5	8	10	15
Octopus	8	55	9	78	9	101
Seabass, other	4	23	4	24	4	22
Other crustaceans*	2	8	2	8	3	14
Herring	2	8	3	9	3	9
Other	23	145	27	152	32	167
<b>Total</b>	<b>74</b>	<b>502</b>	<b>87</b>	<b>601</b>	<b>96</b>	<b>635</b>

\*Main species are freshwater crayfish, shrimps and crabs.

Source: EUMOFA based on data from US Bureau of the Census.

Table 12. **US IMPORTS FROM THE EU BY COUNTRY OF ORIGIN (volume in 1.000 tonnes, value in million EUR)**

Country	2016		2017		2018	
	Volume	Value	Volume	Value	Volume	Value
Spain	15	100	19	133	23	172
UK	13	102	18	141	17	136
Poland	10	41	11	48	10	49
Germany	8	75	10	93	10	82
Denmark	5	14	7	24	10	27
France	4	20	5	20	6	23
Other	19	151	19	142	19	145
<b>Total</b>	<b>74</b>	<b>502</b>	<b>87</b>	<b>601</b>	<b>96</b>	<b>635</b>

Source: EUMOFA based on data from US Bureau of the Census.

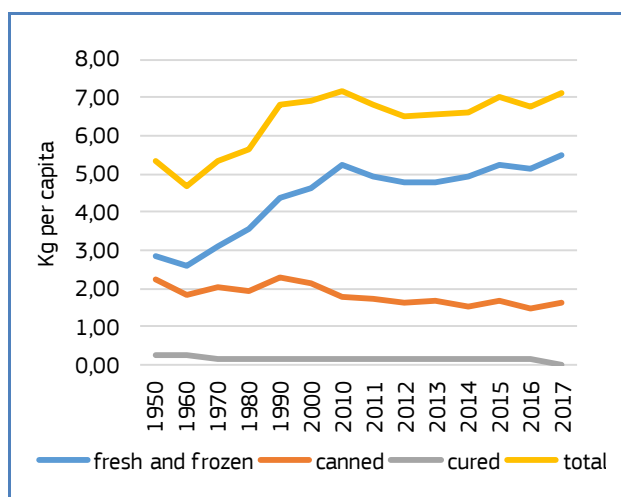


## 5.5 Consumption

The US is one of the largest consumer markets of seafood in the world and the NOAA estimates that US consumers spent USD 102 billion (EUR 91 billion) for fishery products in 2017<sup>38</sup>. However, 20% of Americans do not eat any seafood and only a small percentage eats enough according to the American health guidelines<sup>39</sup>. The seafood consumption varies between the different regions and preferences are partly driven by local species. Not surprisingly, the seafood consumption is higher where the supply traditionally has been the largest, and seafood consumption decreases the further away from the coast one can get. The country has good conditions and a long tradition for meat production, and its consumption is five times greater than seafood consumption<sup>40</sup>.

The estimated consumption of fish and shellfish per capita in the US in 2017 was 7,2 kg of edible meat<sup>41</sup>, which was 0,50 kg more compared with 2016. Consumption of fresh and frozen finfish accounted for 2,80 kg, while consumption of fresh and frozen shellfish was 2,60 kg per capita. Of the top six species consumed in the US, four originate from aquaculture: shrimp (2,00 kg), salmon (1,10 kg), tilapia (0,50 kg) and pangasius (0,30 kg). The two other species in the top six originate from the wild: canned tuna (1,00 kg) and Alaska pollock (0,35 kg)<sup>42</sup>.

Figure 50. **CONSUMPTION PER CAPITA OF SEAFOOD IN THE US, EDIBLE MEAT (volume in kg)**



Source: NOAA; Fisheries of the US, 2017.

American consumers have a large selection of seafood to choose from. It is estimated that between 300 and 500 different species are available for consumption in the United States, but only a few make up about 90% of consumption. Shrimp, salmon and tuna account for as much as 56% of consumption. Tilapia, Alaska pollock, pangasius, cod, catfish and mussels follow. Salmon dominates the fresh category; shrimp frozen items and tuna prevails among canned products<sup>43</sup>.

<sup>38</sup> Fisheries of the United states 2017 - <https://www.fisheries.noaa.gov/resource/document/fisheries-united-states-2017-report>

<sup>39</sup> <https://seafood.no/markedsinnsikt/fiskemarked-h2018/usa-h2018/>

<sup>40</sup> See footnote 39.

<sup>41</sup> See footnote 38.

<sup>42</sup> <https://www.aquaculturealliance.org/blog/2017-us-seafood-consumption/>

<sup>43</sup> <https://seafood.no/markedsinnsikt/fiskemarked-h2018/usa-h2018/>

## 6 Global highlights

**IUU / Taiwan / EU:** The EU has recognised Taiwan's reforms put in place during the last three and a half years to tackle illegal, unreported and unregulated (IUU) fishing. The European Commission decided to lift the yellow card, thereby acknowledging the progress made by Taiwan and the major upgrade of its fisheries legal and administrative systems to fight against IUU fishing. Taiwanese authorities now have a broad range of modern and efficient tools to fight IUU fishing in place. This is a major step forward, given that Taiwan's fleet is the second largest in the world, and plays a central role in the international supply chain for fisheries products<sup>44</sup>.



**IOTC / EU / Sustainability:** The Indian Ocean Tuna Commission (IOTC) established a series of measures to set the highest standards in all Regional Fisheries Management Organisations (RFMOs). Among decisions, Fish Aggregating Device (FAD) numbers are to be reduced to 300. Furthermore, standards for data collection will be improved, and marking schemes will be established, while control procedures will be strengthened. Interdiction to retain on board any manta and mobula rays for all vessels operating in the IOTC convention area was also endorsed<sup>45</sup>.

**EU / Canada / Trade:** The European Union and Canada signed an ocean partnership agreement. The partnership agreement includes clear commitments to combatting the negative effects of illegal, unreported and unregulated (IUU) fisheries, marine pollution and climate change. It will also facilitate the sustainable development of marine and maritime sectors and the implementation of the 2030 Agenda for the Sustainable Development Goal 14<sup>46</sup>.

**Tuna / Supply / EU:** Non-canned tuna imports into the EU28 increased moderately in 2018, dominated by frozen fillets. The EU imported nearly 23.000 tonnes of frozen tuna fillets in 2018, about 3% more than in 2017. Imports increased in France, the Netherlands, Portugal, and Poland but declined in Spain and Italy. Summer demand for tuna fillets also increased in Eastern European countries<sup>47</sup>.

**WTO / Sustainability:** A new online “**Environmental Database**” is available to track trade and environmental measures and policies of over 160 World Trade Organization (WTO) members. With search functions to filter data by member country, sector, objective (e.g. sustainable fisheries management) and type of measure, this dataset offers a useful tool for policy makers, private sector and other interested stakeholders. The EU28 had the highest number of Trade Policy Reviews (TPR) entries on fisheries, followed by Japan, Belize, Morocco, Malaysia and Fiji<sup>48</sup>.

**Pangasius / EU / Vietnam / Supply:** In 2019, Vietnamese pangasius (*Pangasius bocourti*) export to the EU market continued to increase. As of the end of May 2019, the total value of pangasius export to this market reached EUR 105 million, up 30%, accounting for 15% of total export of pangasius. Export to the UK, France, and Spain continued to grow positively<sup>49</sup>.

<sup>44</sup> [http://europa.eu/rapid/press-release\\_IP-19-3397\\_en.htm](http://europa.eu/rapid/press-release_IP-19-3397_en.htm)

<sup>45</sup> [https://ec.europa.eu/fisheries/press/indian-ocean-tuna-commission-iotc-annual-meeting-progress-towards-sustainability\\_en](https://ec.europa.eu/fisheries/press/indian-ocean-tuna-commission-iotc-annual-meeting-progress-towards-sustainability_en)

<sup>46</sup> [https://ec.europa.eu/maritimeaffairs/press/eu-and-canada-conclude-ocean-partnership-agreement\\_en](https://ec.europa.eu/maritimeaffairs/press/eu-and-canada-conclude-ocean-partnership-agreement_en)

<sup>47</sup> <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1199311/>

<sup>48</sup> <http://www.fao.org/in-action/globefish/fishery-information/resource-detail/en/c/1199612/>

<sup>49</sup> <http://www.vasep.com.vn/>

## 7 Macroeconomic Context

### 7.1 Marine fuel

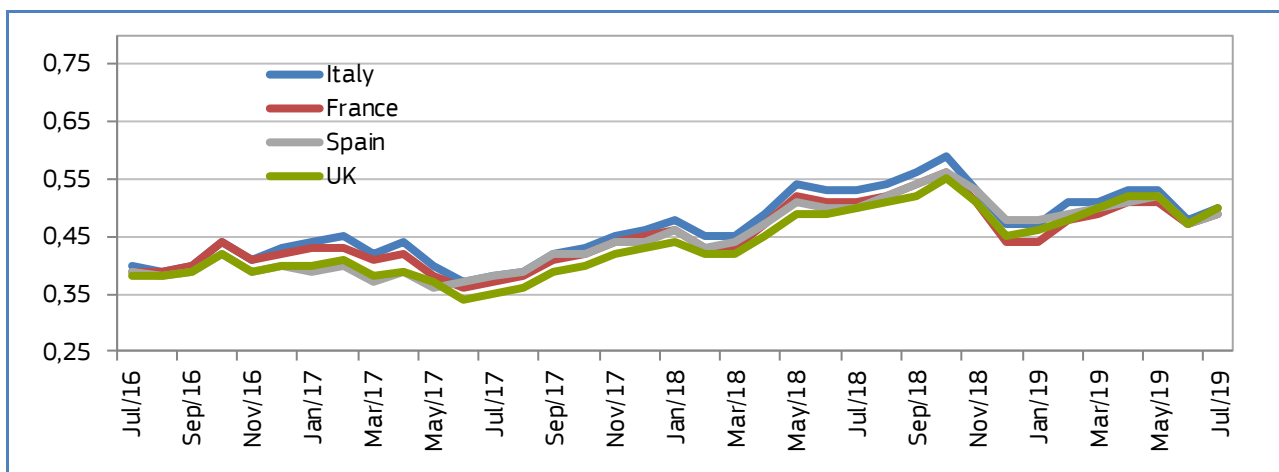
Average prices for marine fuel in **July 2019** ranged between 0,49 and 0,50 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. These prices were about 5% higher compared with the previous month and 3% lower compared with the same month a year ago.

Table 13. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Jul 2019	Change from Jun 2019	Change from Jul 2018
France <i>(ports of Lorient and Boulogne)</i>	0,49	4%	-4%
Italy <i>(ports of Ancona and Livorno)</i>	0,50	4%	-6%
Spain <i>(ports of A Coruña and Vigo)</i>	0,49	4%	-2%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,50	6%	0%

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

Figure 51. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

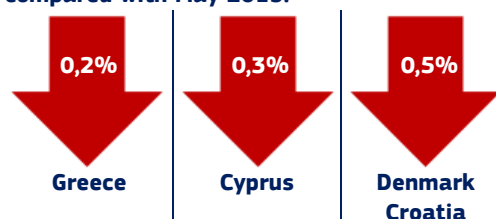


Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

### 7.2 Consumer prices

The EU annual inflation rate was at 1,6% in June 2019 and remained stable compared to May 2019. A year earlier, it was 2,1%.

**Inflation: lowest rates in June 2019, compared with May 2019.**



**Inflation: highest rates in June 2019, compared with May 2019.**

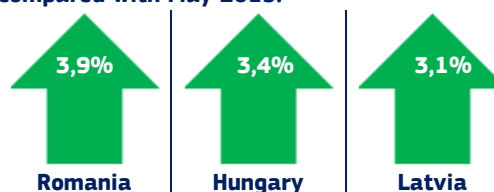


Table 14. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

HICP	Jun 2017	Jun 2018	May 2019	Jun 2019	Change from May 2019	Change from Jun 2018
Food and non-alcoholic beverages	102,04	104,40	106,50	106,46	↓ 0,04%	↑ 1,97%
Fish and seafood	106,33	108,93	110,95	110,81	↓ 0,13%	↑ 1,73%

Source: Eurostat.

### 7.3 Exchange rates

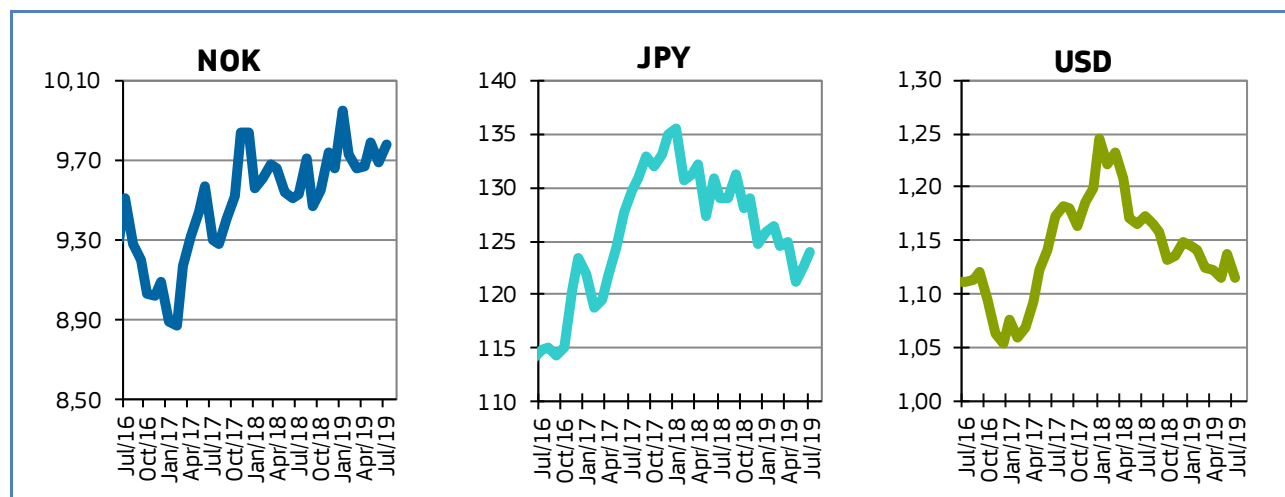
Table 15. EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Jul 2017	Jul 2018	Jun 2018	Jul 2019
NOK	9,3050	9,5338	9,6938	9,7778
JPY	129,70	130,84	122,60	121,04
USD	1,1727	1,1736	1,1380	1,1151

Source: European Central Bank.

In July 2019, the euro appreciated against the Norwegian krone (+0,9%) and the Japanese yen (+1,2%) from June 2019. However, it depreciated against the US dollar (-2,0%). For the past six months, the euro has fluctuated around 123,96 against the Japanese yen. Compared with July 2018, the euro has depreciated 5,2% against the Japanese yen and 5,0% against the US dollar, but it appreciated 2,6% against the Norwegian krone.

Figure 52. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

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

**First sales:** European Commission, European Council, Traffic.org, CITES, FAO, cabi.org, ICES, Danish Fisheries Agency, IUCN.

**Consumption:** EUROPANEL.

**Case studies:** FAO Fishstat, EU Council, NOAA Fisheries, National Oceanic and Atmospheric Administration, FishWatch, Extension.org, Seafood Health Facts, Norwegian Seafood Council, Aquaculture Alliance.

**Global highlights:** European Commission, FAO, fis.com, vasep.com.

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

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

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

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

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

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

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

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