



ISSN 2314-9671

E U M O F AEuropean Market Observatory for
Fisheries and Aquaculture Products

No. 02/2016

**MONTHLY
HIGHLIGHTS****CONTENTS****First sales in Europe:**Belgium: Brill and plaice
Denmark: Mussel and saithe**Global Supply****Case study:** Norwegian capture
fisheries**Consumption:** Plaice and herring**Macroeconomic context**

Find all data and information and much more on:

www.eumofa.eu**In this issue**

In January–November 2015, first-sales value increased in six reporting countries. In France, megrim, squid and cuttlefish were among the contributors to an increase in first-sales value. November 2015 was a particularly good month for scallop (+23% in value). In Portugal, mackerel, swordfish and especially anchovy, experienced significant recoveries in both first-sales value and volume since the same period in 2014. In contrast, November 2015 was a bad month for both Latvia and Sweden mainly due to lower landings of sprat.

Belgium experienced lower volume in January–November 2015, mainly because of reduced landings of plaice (–17%) and sole (–18%). Higher prices of sole, plaice and cod did not offset an overall decrease in first-sales value. In Denmark, the increase in first-sales value was mainly the result of higher prices of herring, plaice, and saithe. The cumulative first sales of saithe reached EUR 31 million in January–November 2015, 40% more than the same period in 2014.

A two-month ban for Portuguese fishermen on sardine took effect on 1 January 2016, as part of the biological rest period of the species, meant to protect juveniles and breeding adults. This affects the purse-seine fleet fishing on the continental coast of Portugal.

In 2015, the total volume landed in Norwegian ports was 2,5 million tonnes, of which 2,15 million tonnes came from Norwegian vessels. 90% of Norway's catch volume comes from stocks in zones shared with other countries. Norway's seafood exports peaked at NOK 74 billion (EUR 8,2 billion) in 2015, more than a twofold increase in 10 years. The export value from fisheries was 33% of the total. Cod had the highest export value (EUR 0,88 billion), 42% more than in 2005. The EU is the main market for Norwegian fisheries and aquaculture products. In 2015, the EU accounted for 67% of the Norwegian seafood exports, compared with 61% in 2014.

Retail prices for fresh plaice in Germany and Sweden show the greatest fluctuations among countries surveyed. In the UK, they increased about 15% during the last three years. In Sweden, retail prices for fresh herring show a decreasing trend.

Marine fuel in fishing ports in France, Italy, and Spain fell over 15% between November and December 2015.

1. First sales in Europe

In **January–November 2015**, ten EU Member States and Norway reported first-sales data for ten commodity groups.¹ First sales increased over the previous year (January–November 2014) in both value and volume for five of the reporting countries.

In **Belgium**, in **January–November 2015**, first sales decreased in value (–6%) and remained stable in volume. See more in Section 1.1.

In **Denmark**, **January–November 2015** first-sales increased 14% in value and 7% in volume. See more in Section 1.2.

In **France**, first sales increased in value (+5%) in **January–November 2015**, despite a decrease in the volumes auctioned (–5%), with the average price rising from 2,97 EUR/kg to 3,27 EUR/kg (+10%). Megrim (+35%), squid (+34%), cuttlefish (+26%), Norway lobster (+22%), and hake (+17%) were among the main contributors to this increase in value. **November 2015** saw first sales increase in both value (+8% over November 2014) and volume (+9%). It was a good month for scallop (+23% in value) with a significant price rise (+11%), Norway lobster (+34%), hake (+24%), and whiting (+43%). Monk and sole experienced price rises, from 4,97 to 5,09 EUR/kg, and from 8,88 to 10,14 EUR/kg, respectively. Volume decreased strongly for sole (–18%), and it increased slightly for monk (+2%).

In **Latvia**, in **January–November 2015**, decreased first-sales value was caused mainly by smelt (–27%) and sprat (–25%). In **November 2015**, a significant increase in herring volume (+41%) did not offset the decrease in European flounder (–96%), smelt (–57%), and sprat (–18%) landings. Average prices dropped for all important species landed and sold, mainly sprat (–21%) and herring (–19%).

In **Norway**, in **January–November 2015**, first-sales value was EUR 1,97 billion (+4%). First-sales volume also increased, ending at 2,68 million tonnes (+1%). While first-sales volume for several of the most important species decreased from January–November 2014, including cod, mackerel, and herring, the first-sales price has increased, raising the first-sales value. To balance the decrease in volumes of several important species, blue whiting has seen a significant increase, at 497.417 tonnes (+23%), driven by an increased quota. In **November 2015**, the first-sales value was EUR 212,98 million, a 4% decrease from November the previous year. First-sales volume also decreased, ending at 235.294 tonnes (–12%). The decrease was caused mainly by a smaller landed volume of herring, at 109.305 tonnes (–30%).

In **Portugal**, first sales experienced a positive evolution in **January–November 2015** compared with the low level registered for the same period in 2014 (+9% in value, +27% in volume) and returned to the level of first sales of two years ago, which they even slightly exceeded (+0,5% in volume, +4% in value over January–November 2013). Major 2015 recoveries are seen for anchovy (+203% in volume, +131% in value), horse mackerel (+30% in volume, +25% in value), mackerel (+67% in volume, +70% in value), and swordfish (+38% in volume, +33% in value). A slowdown in the decline of sardine landings can be noted (–5% in value, –14% in volume). **November 2015** was also much better than November 2014 (+37% in value, +124% in volume), but November 2014 was particularly low owing to the closure of the sardine fishery and small catches of other small pelagics (mackerel and horse mackerel).

Spain landed 194.524 tonnes of fresh fish in **January–November 2015**, a 10% decrease from the same period in 2014. This trend was confirmed in **November 2015**, when Spain landed 17.379 tonnes of fresh fish, 15% less than in November 2014. In January–November 2015, 18 out of the 24 reporting fishing ports recorded decreases in volume relative to the same period last year.² In November 2015, Vigo registered 44% of all Spanish landings, mostly because of mussels (approximately 4.500 tonnes at an average price of 1,10 EUR/kg). In addition, the main species in value landed were monk (17%), brill (15%), and swordfish (6%).³

In **Sweden**, in **January–November 2015**, first-sales value was EUR 87,4 million (+9%). First-sales volume also increased, ending at 145.928 tonnes (+7%). The main cause for the increase over the corresponding period in 2014 was increased landings of herring at 74.446 tonnes (+20%). This was driven by a 19% higher Swedish quota in 2015, at 114.385 tonnes. In **November 2015**, first-sales value was EUR 5,6 million, an 11% decrease from November 2014. First-sales volume in the same month ended at 7.965 tonnes (–19%). The decrease in both value and volume was caused mainly by decreasing landings of sprat, ending at 1.846 tonnes (–50%).

In the **UK**, in **January–November 2015**, the first-sales value was EUR 674,2 million, a 1% decrease from the same period in 2014. First-sales volume in the same period also decreased to 391.187 tonnes (–13%). The decrease was caused mainly by lower volumes of mackerel landed, at 102.974 tonnes (–35%). This was driven by a lower UK quota for mackerel in 2015, at 247.296 tonnes (–15%). First-sales value in **November 2015** was EUR 71,95 million, a 7% increase over November 2014. First-sales volume ended at 47.166 tonnes (+10%). The increase in first-sales value and volume was caused mainly by an increase in landings of mackerel, at 27.509 tonnes (+50%). In the same month, the average first-sales price of mackerel increased 8%, at EUR 0,85/kg.

Table 1. **JANUARY–NOVEMBER OVERVIEW OF THE REPORTING COUNTRIES** (volume in tonnes and value in million euro)

Country	January–November 2013		January–November 2014		January–November 2015		Change from January–November 2014	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	14.515	50,81	17.455	61,13	16.333	61,03	-6%	0%
Denmark	241.068	272,78	242.452	268,86	259.312	304,98	7%	14%
France	186.393	557,97	191.862	569,43	183.097	599,17	-5%	5%
Greece*	12.546	35,08	10.150	29,67	7.873	20,56	-22%	-31%
Italy*	6.849	44,01	7.295	39,68	6.867	39,33	-6%	-1%
Latvia	52.185	13,95	49.752	13,98	51.135	12,50	3%	-11%
Lithuania*	2.485	1,95	1.632	1,10	1.802	1,37	10%	25%
Norway	2.203.854	1.626,50	2.594.215	1.805,98	2.614.909	1.898,06	1%	5%
Portugal	109.556	167,35	87.048	159,90	110.177	173,93	27%	9%
Sweden	134.696	94,34	136.441	80,24	145.928	87,40	7%	9%
United Kingdom	352.167	504,25	451.949	681,87	391.187	674,20	-13%	-1%

Source: EUMOFA (updated 21.01.2015); volume data is reported in net weight.

*Partial data. First-sales data for Greece covers the port of Piraeus (35%). First-sales data for Italy covers 11 ports (10%). First-sales data for Lithuania covers the Klaipeda fish auction.

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

Country	November 2013		November 2014		November 2015		Change from November 2014	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.755	5,06	2.041	6,93	1.790	6,32	-12%	-9%
Denmark	26.054	26,20	25.634	31,11	30.382	34,11	19%	10%
France	17.402	51,85	15.877	52,29	17.340	56,33	9%	8%
Greece*	1.183	3,36	962	2,95	1.047	2,75	9%	-7%
Italy*	674	3,48	763	3,77	806	4,11	6%	9%
Latvia	7.040	1,80	6.459	1,77	6.377	1,45	-1%	-18%
Lithuania*	402	0,23	377	0,26	168	0,11	-55%	-58%
Norway	224.953	157,59	265.897	222,96	235.294	212,98	-12%	-4%
Portugal	10.812	15,27	4.975	10,58	11.159	14,49	124%	37%
Sweden	9.050	6,46	9.866	6,27	7.965	5,60	-19%	-11%
United Kingdom	24.087	46,47	42.846	67,12	47.166	71,95	10%	7%

Source: EUMOFA (updated 21.01.2015); volume data is reported in net weight.

*Partial data. First-sales data for Greece covers the port of Piraeus (35%). First-sales data for Italy covers 11 ports (10%). First-sales data for Lithuania covers the Klaipeda fish auction.

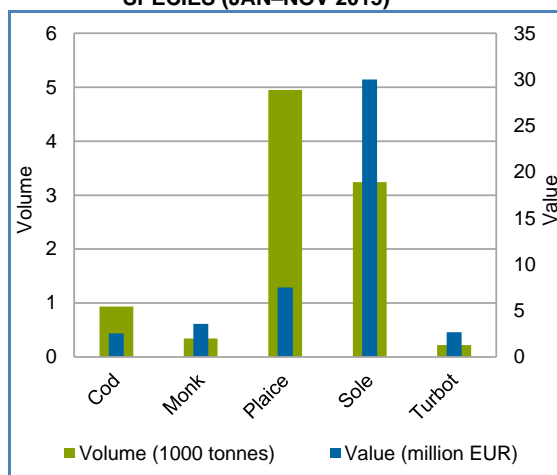
1.1. BELGIUM

Belgium has an exclusive economic zone covering a total surface of 3.478 km², of which 1.430 km² belong to the territorial sea. The Belgian fleet, which is one of Europe's smallest, operates from the Bay of Biscay to the Irish Sea and in the North Sea. In 2014, 80 vessels and 342 fishermen were registered in Belgium. Of these, approximately 75% are Belgian, 23% are Dutch nationals, and 2% are French nationals.⁴

The three fishing ports in Belgium are Zeebrügge, Oostende (Ostend), and Nieuwpoort, covering 65%, 34%, and 1%, respectively, of total landings. Both Zeebrügge and Oostende have plaice, sole, cod, and ray as the most common species registered. In Nieuwpoort, common shrimp is the main species landed.

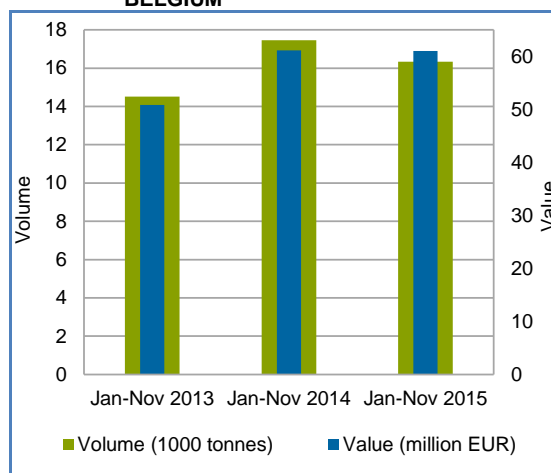
On 2 December 2015, the European Commission adopted a EUR 68,6 million investment package for the Belgian fishery and aquaculture sectors for the 2014–2020 period, including EUR 41,7 million of EU investments. The Operational Program (OP) under the European Maritime and Fisheries Fund (EMFF) supports projects promoting sustainable fisheries – for example, projects that reduce unwanted catches – and aquaculture, as well as projects that improve the competitiveness of those sectors. It also supports the implementation of the Common Fisheries Policy (CFP) through the collection of fish-stock and other marine data as well as various measures to control fishing.⁵

Figure 1. **FIRST SALES IN BELGIUM BY MAIN SPECIES (JAN–NOV 2015)**



Source: EUMOFA (updated 21.01.2015).

Figure 2. **JANUARY–NOVEMBER FIRST SALES IN BELGIUM**



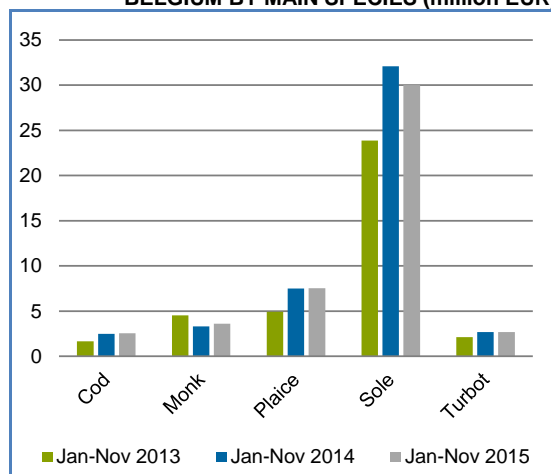
Source: EUMOFA (updated 21.01.2015).

In January–November 2015, the cumulative first-sales value for all reported species was EUR 61 million and 16.333 tonnes. This was nearly stable in value (–0,2%) and a 6% decrease in volume from the corresponding period in 2014.

The decrease in value was caused mainly by the decrease in landings, but at the same time, several first-sales prices increased over the same period in 2014, including sole at 9,26 EUR/kg (+15%), plaice at 1,52 EUR/kg (+21%), and cod at 2,74 EUR/kg (+7%).

In November 2015, first-sales value and volume were EUR 6,32 million and 1.790 tonnes. This was a 9% decrease in value and a 12% decrease in volume. This was mainly the result of less volume of sole, although the first-sales price increased 17% over November 2014 (10,32 EUR/kg).

Figure 3. **JANUARY–NOVEMBER FIRST SALES IN BELGIUM BY MAIN SPECIES (million EUR)**



Source: EUMOFA (updated 21.01.2015).

1.1.1. BRILL



Brill (*Scophthalmus rhombus*) can be found in the North Sea, Skagerrak and Kattegat, and the English Channel. Fisheries occur throughout the year with the main season in the

period November–April. Two of the most frequently used gears are gillnets and fixed nets.

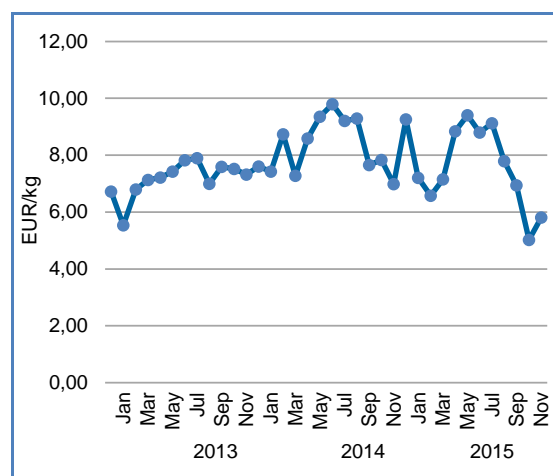
Brill lives on sand or mixed bottoms and feeds on bottom-living fish and larger crustaceans. It can be up to 75 cm long and live for up to six years. The spawning period is April–August at depths of 10–20 m. Brill is marketed fresh and frozen, eaten steamed, fried, broiled, or boiled.⁶

The brill fisheries in the Norwegian and the North seas are managed under the EU Common Fisheries Policy (CFP) primarily through annual Total Allowable Catches (TACs). The TAC is set jointly with turbot. From 2011 to 2015, the TAC remained unchanged at 4.642 tonnes. For 2016, it decreased 3% to 4.488 tonnes.

In 2014, Zeebrugge was the main port for landings of brill with 66% of the total landings. Oostende accounted for the remaining 33% of the landings.

In January–November 2015, the accumulated first sales of brill reached EUR 1,79 million and 258 tonnes. This was a slight increase (less than 1%) in value and a 16% increase in volume, respectively, over January–November 2014.

Figure 5. BRILL: FIRST-SALES PRICE IN BELGIUM

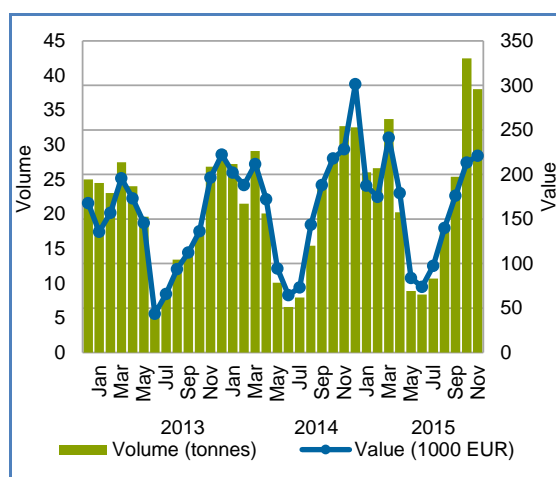


Source: EUMOFA (updated 21.01.2015).

The average unit price of brill in January–November 2015 was 6,92 EUR/kg. This was a 14% decrease from the same period in 2014.

In November 2015, the price was 5,81 EUR/kg, a 17% decrease from November 2014, with more volume landed (+16%).

Figure 4. BRILL: FIRST SALES IN BELGIUM



Source: EUMOFA (updated 21.01.2015).

1.1.2. PLAICE



Plaice can be found on the continental shelf from the Bay of Biscay in the south, through the English Channel, North Sea, and Irish Sea to the Baltic, and up the

Norwegian coast to the Barents Sea. Common gears used in plaice fishery are trammel net, gillnet, Danish seine, and beam and demersal trawl.

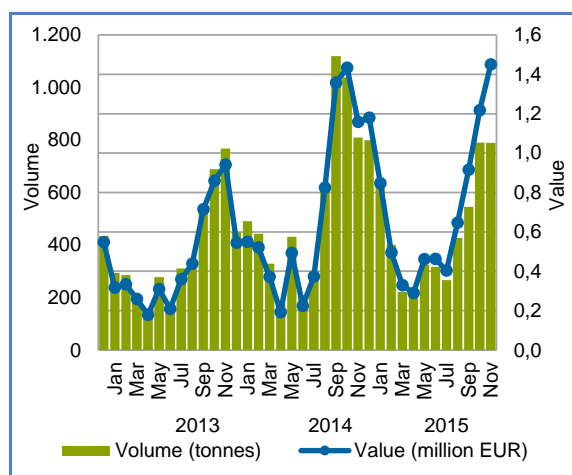
Plaice is a demersal species living on sandy substrates and is a shallow water species found from the near coast as juveniles down to around 150 meters in northern waters. The species has bright red to orange spots, separating it from other flatfishes, with the underside being pearly white. Spawning period is from December–March with peaks in January–February.⁷

Plaice is commonly fished in mixed fisheries with sole. For the Belgian fleet, plaice is caught throughout the year, with peaks in the autumn and early winter (September–January). Plaice is the species with the highest volume landed (6.773 tonnes in 2014) and 2nd largest in value (EUR 8,68 million), behind sole (EUR 34,9 million).

Plaice is subject to TACs. In 2016, Belgium quota accounts for 9.740 tonnes, a 17% increase from 2014. Belgian quota of plaice is approximately 6% of the EU TACs. The majority of the Belgian quota is in the Norwegian and the North seas. Since 2010, the Belgian quota has increased steadily (+115%) from 4.536 tonnes, following the total EU quota increase in the same period, from 81.812 tonnes to 161.053 tonnes.

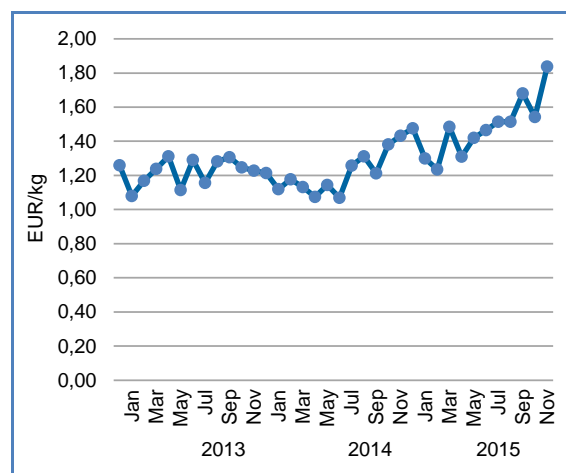
In January–November 2015, the accumulated first-sales value of plaice was EUR 7,52 million, a slight increase (less than 1%) from the same time in 2014. The first-sales volume ended at 4.953 tonnes, a 17% decrease.

Figure 6. PLAICE: FIRST SALES IN BELGIUM



Source: EUMOFA (updated 21.01.2015).

Figure 7. PLAICE: FIRST-SALES PRICE IN BELGIUM



Source: EUMOFA (updated 21.01.2015).

The average unit price of plaice in January–November 2015 was 1,52 EUR/kg, a 21% increase over January–November 2014.

In November 2015, the price trend followed the rest of the year, increasing 29% over November 2014, ending at 1,84 EUR/kg, but with less volume (–2%).

The price varies considerably according to size. In 2014, the average first-sales price was 2,17 EUR/kg for category 1 (the largest), while it was 0,96 EUR/kg for category 4 (the smallest).

1.2. DENMARK

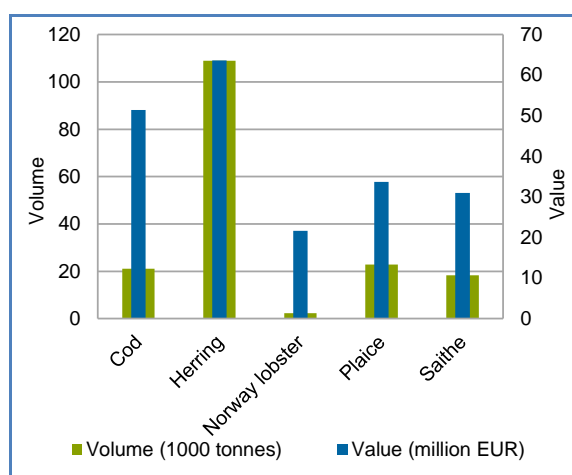
The Danish fishing fleet is highly diversified, consisting of over 2.000 registered vessels. It operates mainly in the North Atlantic and the Baltic Sea. A small-scale fleet, vessels shorter than 12 m, uses static gears and it operates in the Baltic Sea, the Sounds, and Kattegat.

The remaining fleet operates in the North Sea and Skagerrak where most of the catches occur, and they target cod, plaice, saithe, herring, mackerel, Norway lobster, as well as coldwater shrimp.⁸

In addition, the fleet catches species used for the production of fishmeal and fish oil, such as sandeel, sprat, and blue whiting. Landings for industrial purposes increased in volume in recent years. This was mainly the result of a significant increase in the sandeel quota, which counterweighted the decline in the landings of herring, sprat, and Norway pout.⁹

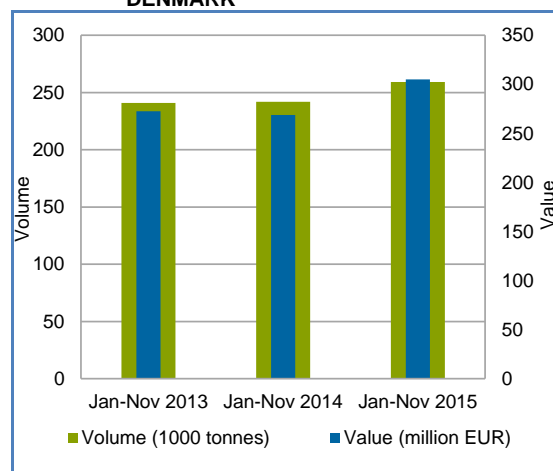
Some fishing vessels grade, weigh, and pack the fish on board, which is then delivered to the auctions. But most of the fish is delivered ungraded to a harbour, where it is collected by specialised companies who grade, weigh, repack the catch, and deliver it to the auctions. Mussels and fish for industrial uses (including fish oil and fishmeal) are delivered directly to processing companies.

Figure 8. **FIRST SALES IN DENMARK BY MAIN SPECIES (JAN-NOV 2015)**



Source: EUMOFA (updated 21.01.2015).

Figure 9. **JANUARY-NOVEMBER FIRST SALES IN DENMARK**

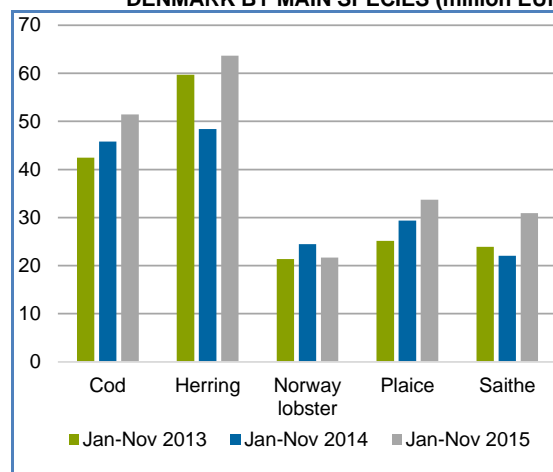


Source: EUMOFA (updated 21.01.2015).

In January–November 2015, the cumulative first-sales value for all reported species was EUR 305 million, with a volume of 259.300 tonnes. This was a 14% increase in value and 7% increase in volume over the corresponding period in 2014.

The increase in value was caused by several species, including the first-sales price of herring 0,58 EUR/kg (+28%), plaice 1,48 EUR/kg (+16%), and saithe at 1,69 EUR/kg (+9%). The increase in volume was caused by mussel (+17%), saithe (+29%), and herring (+19%).

Figure 10. **JANUARY-NOVEMBER FIRST SALES IN DENMARK BY MAIN SPECIES (million EUR)**



Source: EUMOFA (updated 21.01.2015).

1.2.1. MUSSEL



Mussel *Mytilus* spp is found in a wide variety of habitats, from tidal areas to fully submerged zones. It can withstand wide variation in salinity, desiccation,

temperature, and oxygen concentration, resulting in the ability to occupy a large variety of microhabitats. Mussel feeds on phytoplankton and organic matter by constantly filtering the seawater. Specific features of mussel are their high fecundity and a mobile larval phase, allowing for widespread distribution. Mussel shells are all of about equal size. Shell valves are strong, pointed at the front, wider at the rear, and rounded. Maximum mussel size is approximately 10 cm. However, in low-salinity, brackish water it is much smaller.¹⁰

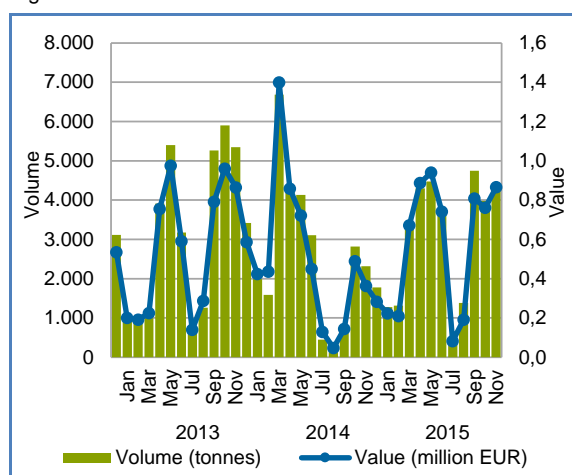
Limfjord is the most important fishing ground for mussel in Denmark. Here, the mussels form stabilised mussel beds of interconnected mussels and dead shells. Mussel beds are often dominant in biomass, and they form a key component of many marine communities. A small mussel fishery is also located in the southern Kattegat and the Belt Sea.

Mussel is fished with one or two dredges on each vessel. All mussel fisheries in Denmark are Marine Stewardship Council (MSC) certified. In Limfjord, there are approximately 37 certified vessels that dredge mussels (approximately 30.000 tonnes).

Fishing takes place year-round, with peaks in March–June and September–December. Mussel is sold shelled, cooked and frozen, or as whole live. Most of the landings are exported as frozen mussel or canned products to the rest of Europe.

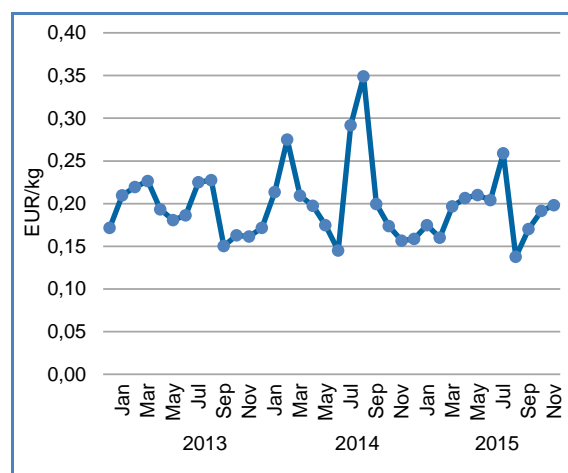
In January–November 2015, the accumulated first-sales value of mussel was EUR 6,4 million, a 17% increase over the same period in 2014. The first-sales volume ended at 33.200 tonnes, a 17% increase over January–November 2014.

Figure 11. MUSSEL: FIRST SALES IN DENMARK



Source: EUMOFA (updated 21.01.2015).

Figure 12. MUSSEL: FIRST-SALES PRICE IN DENMARK



Source: EUMOFA (updated 21.01.2015).

In January–November 2015, the average unit price of mussel was 0,19 EUR/kg, a 12% decrease from January–November 2014.

In November 2015, the price followed a trend opposite to that of the rest of the year, increasing 27% over November 2014, reaching 0,20 EUR/kg. The volume in the same month was up 88% from November 2014.

1.2.2. SAIthe



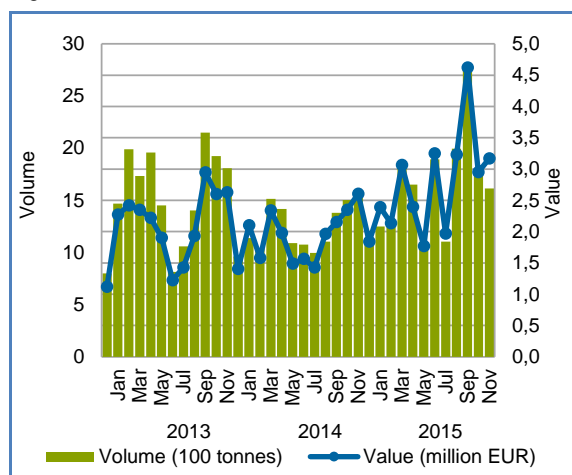
Saithe (*Pollachius virens*) is a gregarious fish found in both inshore and offshore waters. Usually, it enters coastal waters in spring and returns to deeper waters in winter. The species is distributed across the North Atlantic to the Barents Sea, around Greenland and Iceland, in the North Sea, and in the Bay of Biscay. Young saithe feed primarily on krill, and adults feed on young haddock, Norway pout, and herring. Saithe is one of the top predators in the North Sea ecosystem. The fish reaches maturity between 4 and 6 years. Spawning takes place in January–March at approximately 200 m depth.¹¹

Saithe is caught by trawl fishery year-round, in direct or mixed fisheries with bycatches of cod and haddock. On the market, saithe is available fresh and as frozen fillets. Main markets for Danish saithe are Germany, the Netherlands, France, and Spain. A small portion of the catch is filleted in Denmark for domestic consumption.¹²

The species is subject to TACs. In 2015, Denmark's quota was 2.711 tonnes, representing approximately 6% of the total EU TAC. It was 15% lower than in 2014 and 38% lower than in 2010. About 85% of the saithe landed in Denmark came from foreign vessels mainly from Norway, UK, Germany and France.

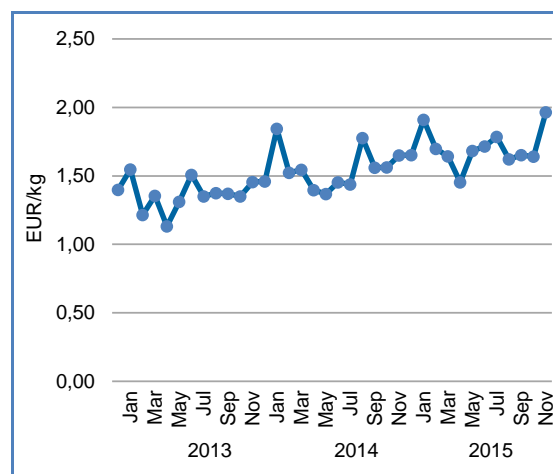
In January–November 2015, the cumulative first sales of saithe reached EUR 30,9 million and 18.273 tonnes. This was a 40% increase in value and 29% increase in volume over January–November 2014.

Figure 13. SAIthe: FIRST SALES IN DENMARK



Source: EUMOFA (updated 21.01.2015).

Figure 14. SAIthe: FIRST-SALES PRICE IN DENMARK



Source: EUMOFA (updated 21.01.2015).

The average unit price of saithe in January–November 2015 was 1,71 EUR/kg, 10% higher than in January–November 2014.

In November 2015, the price was 1,96 EUR/kg, 19% higher than in November 2014.

2. Global Supply

EU / IUU: The European Union (EU) is analysing the improvements made by Thailand to combat illegal, unregulated and unreported (IUU) fishing. In April 2015, the EU issued a yellow card on the grounds that the country has not done enough to address illegal fishing practices. The EU will decide whether or not to impose a ban on the entry of Thai fishery products to the EU market. Thai fish and seafood exports to the EU are EUR 650 million per year (2014).¹³

Resources / Argentina: For the second year in a row, landings have decreased in Argentina, down from 785.00 tonnes in 2014 to 752.000 tonnes in 2015. Among the top species, squid (-25% at 127.000 tonnes) and Patagonian grenadier (-17% at 48.000 tonnes) have registered the biggest drops. On the opposite, Argentine hake (+1,5% at 263.000 tonnes) and red shrimp (+10% at 141.000 tonnes) have increased significantly.¹⁴

Resources / Portugal: A two-month ban on fishing for sardine (*Sardina pilchardus*) took effect on 1 January 2016, as part of the biological rest period of the species. The fishing ban affects the purse-seine fleet fishing in waters of the continental Portugal. In 2016, the sardine quota (jointly managed by Spain and Portugal) is set at 14.000 tonnes. The European Commission approved a ceiling of 10.000 tonnes to be fished by Portugal and Spain from 1 March until 31 July.¹⁵

Resources / France: For the second year in a row Lorient is the first fishing port in France in 2015, ahead of Boulogne-sur-Mer and Le Guilvinec. 26.500 tonnes of fish have been sold in the auction for a value of nearly EUR 85 million. The most important species was Norway lobster, with more than 1.000 tonnes at a price of 11,20 EUR/kg. The other top species were hake and monk.¹⁶

Certification / Aquaculture / Poland: A Polish firm became the first recirculated aquaculture system (RAS) tilapia farm to achieve Aquaculture Stewardship Council (ASC) certification. The company supplies fresh tilapia to Polish and European markets.¹⁷

Trade / EU / Ukraine: On 10 January 2016, Ukraine exited the free trade area with Russia, banned the import of food products, and raised duties on all goods. On 1 January 2016, the Deep and Comprehensive Free Trade Area (DCFTA) which forms part of the Association Agreement between Ukraine and the European Union, entered into force. The EU is Ukraine's main trading partner. In 2014, the EU exported to Ukraine 75.500 tonnes of fish and seafood products worth EUR 71,5 million. The main species were herring, sprat, mackerel and salmon. In 2015, exports were lower in both value and volume (-33% and -12%, respectively)¹⁸

EU fishing fleet / New infographic: The EU fishing fleet's economic performance is improving, but there are still challenges ahead. A new infographic on the economic performance of the EU fishing fleet is available. Find it [here](#).¹⁹

EU aquaculture / New infographic: A new infographic on EU aquaculture is now available. It provides the scientific name and the corresponding commercial designation in 23 EU languages of the main species farmed in the EU. Find it [here](#).²⁰

EU / Sustainable fisheries: A short animated video on sustainable fisheries for sustainable development is available in English and French. It is about the importance of fisheries for food security, health, and growth in developing countries, highlighting the commitment of the EU with third countries to help promote sustainable management of seafood resources and inclusive opportunities for trade and growth. Find it [here](#).²¹

EU / Promotion: The European Commission will release EUR 100 million to producer organisations, trade organisations and public bodies to promote globally the high quality of "made-in-the-EU" fishery and aquaculture products. In return for the funds, producers will inform the consumers of the high standards and broad diversity of EU products.²²

3. Case study: Norwegian capture fisheries

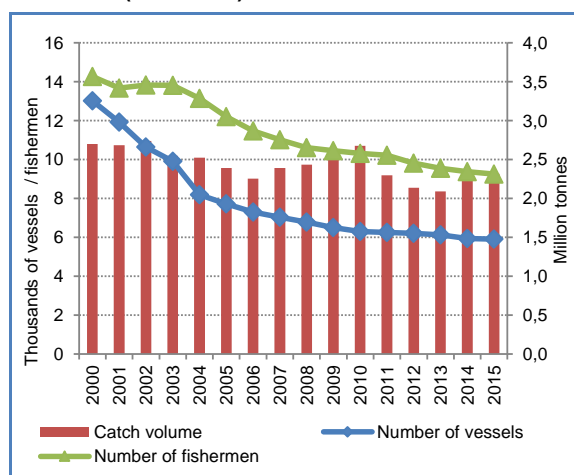
3.1. Fishery activity – a historical perspective

Norway was ranked by the FAO the 11th largest player concerning fisheries and aquaculture production representing approximately 1,83% of the global catch and production in 2013. In Europe, Norway was the third largest producer after Russia and the EU.²³ In 2014, the contribution of fishery and aquaculture to the Norwegian GDP was almost twice as large as that of agriculture and forestry (0,9% versus 0,5%).²⁴ It represented NOK 28,4 billion (EUR 3,4 billion). The biggest share was from aquaculture (2013) at NOK 14,9 billion (EUR 1,9 billion), whereas fisheries contributed with NOK 8,2 billion (EUR 1,1 billion).²⁵

Since the expansion of the Norwegian economic zone to 200 nautical miles in the late 1970s, the fishing grounds of the Norwegian fishing fleet stretch from Svalbard and the Barents Sea in the north, via the North Sea, to the Skagerrak in the south. In the Barents Sea, Norway, together with Russia, is responsible for the resource management of the largest Atlantic cod stock. The North Sea is the main fishing ground for pelagic species, such as herring and Atlantic mackerel.

Over the past 15 years, the catch volume has remained relatively stable, between 2,1 and 2,7 million tonnes. During the same period, the number of both registered vessels and fishermen has fallen steadily. In 2015, 9,261 people registered fishing as their main occupation, half as many as registered in the early 1990s. In all, 5,914 vessels were operating in 2015, of which 80% were coastal vessels with a hull length of less than 11 m, typically operated by one person.

Figure 15. **NORWEGIAN CATCH VOLUME AND THE NUMBER OF VESSELS AND FISHERMEN (2000–2015)**



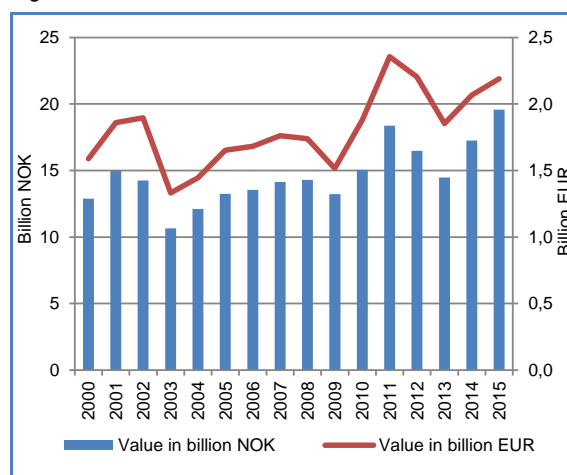
Source: Norwegian Directorate of Fisheries.

In 2015, the total volume landed in Norwegian ports was 2,5 million tonnes, of which 2,15 million tonnes came from Norwegian vessels. In the preceding 15 years, landings from foreign vessels varied between 150 and 600

thousand tonnes, with Russia, the UK, and Denmark as the vessels' major flag states. In 2015, Russian vessels landed primarily cod, haddock, and saithe in northern Norway. The fleets from the UK and Denmark landed pelagic species in ports around the North Sea basin.

The value of first sales in Norway has increased from around EUR 1,6 billion to approximately EUR 2,2 billion in the past 15 years, a 38% increase. However, when measuring the value increase in the local currency, Norwegian krone (NOK), the corresponding growth has been 52%. The depreciation of the NOK has strongly affected the competitiveness of Norwegian seafood exports between 2012 and 2015, when the value of landings increased 19% in NOK, while declining 0,5% if measured in EUR.

Figure 16. **NORWEGIAN FIRST-SALES VALUE**



Source: Norwegian Directorate of Fisheries.

3.2. Management of fisheries and landings

Approximately 90% of Norway's catch volume comes from stocks in zones shared with other countries. For the most important fish stocks, quota levels are set in cooperation with other countries, including Russia, Iceland, the Faroe Islands, Greenland, and the EU.

In Norway, first sales of fishery products are managed through the systems of six sales cooperatives. Norges Sildesalgslag (Norwegian Fishermen's Sales Organisation for Pelagic Fish) is Europe's largest marketplace for first sales of pelagic species. First sales of all other fish, as well as shellfish and crustaceans, are made through the other five organisations of which Norges Råfisklag (Norwegian Fishermen's Sales Organisation) is the largest, covering more than half of the Norwegian coastline, in Norway's six northernmost counties.

The six sales cooperatives are the fishermen's own sales organizations and operate as marketplaces for wild-caught Norwegian seafood. The cooperatives manage

trade, sales, payments and quality assurance. They also set minimum prices for landings to secure reasonable prices for the fishermen when selling their catches in the ports.

3.3. First sales

The top five species by value landed in Norway in 2015 were cod, mackerel, herring, saithe, and shrimp. For the past three years, the volume of cod has declined as a result of progressively lower TACs, while the value has risen. A higher value was mainly caused by the development of new markets creating high demand. In 2015, when availability was lower than in 2013 and 2014, market prices for cod increased significantly.

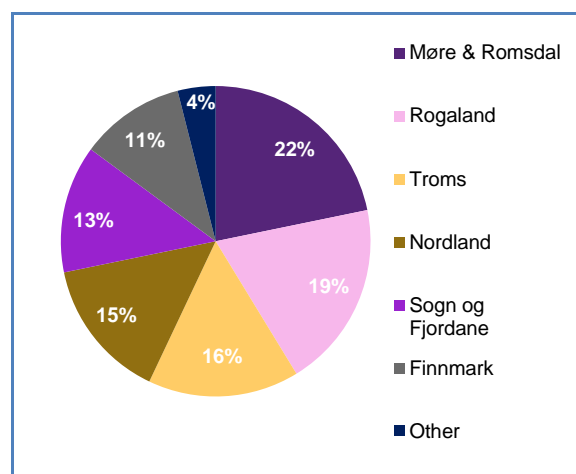
Some of Norway's fisheries are highly seasonal. The main season for cod fisheries is January–April, with several smaller peaks in late autumn around Christmas (October–December). Mackerel's main season is August–October. Herring fisheries are typically split into winter and autumn seasons.

The main season for shrimp occurs during summer (May–September), while saithe is landed year-round. Landings in Norway occur from the south to the North Cape, but some counties register more volume than others. Møre and Romsdal county, in Norway's midwest region at approximately 62° north, is the largest, with approximately 22% of the total registered landings.

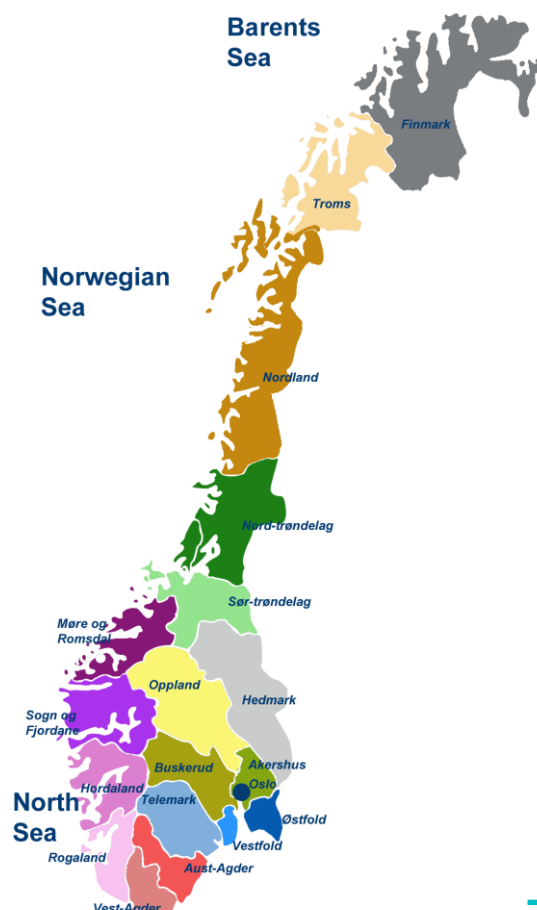
Table 3. THE TOP FIVE LANDED SPECIES IN NORWAY

	Volume (tonnes)			Value (million NOK)			Value (million EUR)		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
Cod	564.931	599.573	535.908	4.739	5.690	6.512	607	681	728
Mackerel	240.026	432.248	386.199	2.092	3.229	3.192	268	386	357
Herring	561.839	448.807	338.869	2.654	2.082	1.992	340	249	223
Saithe	156.735	160.761	159.250	998	1.306	1.530	128	156	171
Shrimp	17.397	23.817	36.360	522	735	1.307	67	88	146
Other	671.664	840.542	1.048.611	3.464	4.223	5.049	444	505	565
Total	2.212.592	2.505.749	2.505.198	14.470	17.265	19.582	1.854	2.066	2.190

Figure 17. THE TOP SIX FIRST-SALES COUNTIES IN NORWAY BY VOLUME



Source: Norwegian Directorate of Fisheries.



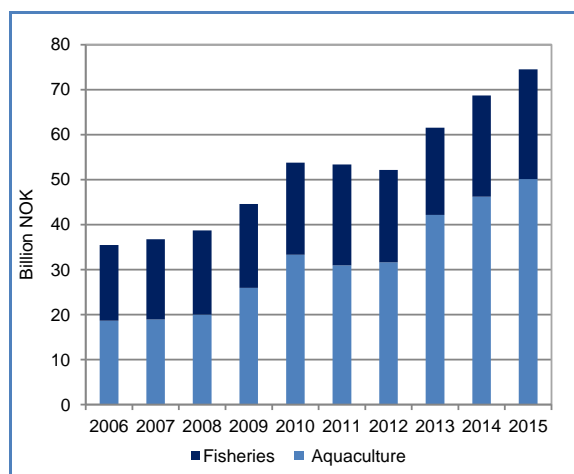
3.4. Exports and marketing

Norwegian seafood exports in 2015 ended on a record high. The export value of fishery and aquaculture products (FAPs) rose 8% in 2015 to around NOK 74 billion (EUR 8,2 billion EUR).

It is more than a twofold increase in 10 years. Fishery and aquaculture products accounted for 9% of overall Norwegian export revenues in 2015, while 10 years ago, they accounted for only 5%. Aquaculture represented the highest growth in export value in the last decade (+170%).

Norway also imports certain fishery products, mainly fishmeal and fish oil, along with fresh herring and mackerel, as foreign vessels sell and land their catches to Norwegian processing plants.

Figure 18. **NORWEGIAN EXPORT OF FISHERY AND AQUACULTURE PRODUCTS**



Source: Statistics Norway (2015 preliminary data).

Record high export values were observed both for fishery and aquaculture species. However, the export value from fisheries grew more slowly than for aquaculture. In 2015, the export value from fisheries amounted to NOK 24,4 billion (EUR 2,7 billion) or 33% of total FAP export value. In the period 2006–2008, fisheries accounted for almost half of the export value (48%).

Cod was the highest valued fishery species in 2015. Despite a 21% fall in export volume, export value increased 9% between 2014 and 2015 to NOK 7,9 billion (EUR 0,88 billion). In comparison, the export value in 2005 was NOK 5 billion (EUR 0,62 billion). From 2014 to 2015, the export volume and value for mackerel fell 12% and 7%, respectively, while volume and value for herring fell 28% and 12%. The combined export value for the two species in 2015 amounted to NOK 6,2 billion (EUR 0,7 billion) which was 6% lower than in 2005.

For shrimp, first-sales prices increased significantly from 2005 to 2015 causing also the average export price to increase significantly, from 3,16 EUR/kg to 9,60 EUR/kg, respectively.

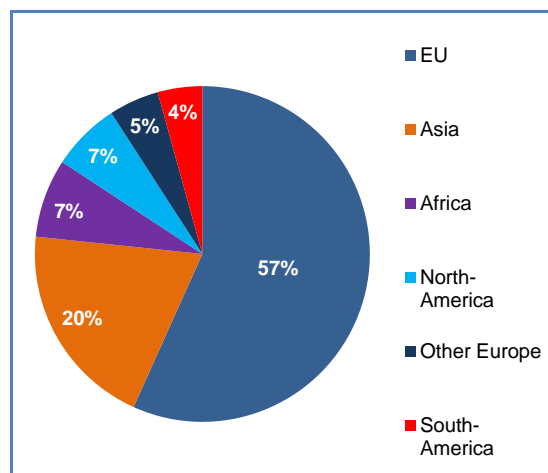
Table 4. **TOP 15 EXPORTED SPECIES (FISHERY AND AQUACULTURE)**

Species	2005		2015	
	Value billion EUR	Volume 1000 tonnes	Value billion EUR	Volume 1000 tonnes
Atlantic salmon	1,71	480	5,34	1.035
Cod	0,62	123	0,88	205
Mackerel	0,29	167	0,43	352
Herring	0,45	537	0,27	216
Trout	0,16	44	0,26	53
Saithe	0,19	108	0,23	73
Haddock	0,08	38	0,15	57
Shrimp	0,10	33	0,09	9
Crab	0,02	2	0,07	5
Greenland halibut	0,05	14	0,06	13
Blue whiting	0,00	5	0,04	170
Ling	0,03	6	0,03	8
Redfish	0,02	8	0,03	16
Halibut	0,01	1	0,02	2
Tusk	0,00	0	0,02	4
Other species	0,23	211	0,42	408
Total	3,96	1.777	8,33	2.625

Source: Statistics Norway (2015 preliminary data).

In 2015, as in previous years, the EU has been the main market for Norwegian FAPs. In 2015, the EU accounted for 67% of the total export value of Norwegian FAPs which was an increase from 61% in 2014. The EU had a market value share of 57% for fishery products in 2015, up from 50% in 2014.

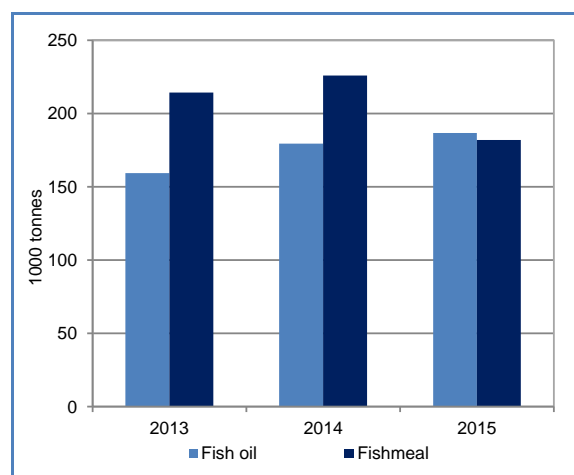
Figure 19. **MAIN MARKETS FOR CAPTURE FISHERIES BY VALUE (2015)**



Source: Statistics Norway (preliminary data).

Although Norway is by far a net exporter of FAPs, the growth in the aquaculture industry has made Norway dependent on the import of feed, especially fish oil. Imports of fish oil in 2015 totalled 186.600 tonnes and surpassed imports of fishmeal (181.900 tonnes) for the first time.

Figure 20. **NORWEGIAN IMPORT OF FISHMEAL AND FISH OIL**



Source: Statistics Norway (2015 preliminary data).

From 2013 to 2015, the average import price of fish oil rose from 16,43 NOK/kg to 24,18 NOK/kg (+47%), while the import price of fishmeal rose 23%, to 13,08 NOK/kg. In addition to fishmeal and fish oil, the main FAPs imported by Norway were 131.500 tonnes of fresh mackerel (-6% from 2014) and 15.900 tonnes of fresh herring (-4% from 2014).

3.5. Exchange rate

A major factor influencing the 8% increase in FAP export value in 2015 was changes in foreign exchange rates. It is estimated that 80–90% of FAP exports are exposed to foreign currencies. As the EU is the main export market for Norwegian FAPs, variations in the NOK/EUR exchange rate have affected market prices and demand. From 2014 to 2015, the NOK weakened 7% relative to the EUR and 19% relative to the GBP. Norwegian seafood export value to the UK rose 30% from 2014 to 2015. Export value to the USA, another important market, rose 37% from 2014 to 2015 measured in NOK. In the same period the NOK weakened 28% relative to the USD.

Table 5. **DEVELOPMENT IN FOREIGN EXCHANGE RATES**

	2013	2014	2015	% change
NOK / EUR	7,81	8,36	8,94	7%
NOK / GBP	9,19	10,37	12,32	19%
NOK / USD	5,88	6,3	8,06	28%
NOK / 100 JPY	6,03	5,95	6,66	12%

Source: European Central Bank.

3.6. Joint marketing and R&D – export levy and R&D levy

In general, a levy of 1,05% is applicable to exports of Norwegian FAPs. The levy can be divided in two parts: export levy (0,75%) and R&D levy (0,30%). The R&D levy is intended for the financing of the Norwegian Seafood Research Fund (FHF), which is instrumental in the Norwegian seafood industry's management of its R&D investments. The FHF board is appointed by the Ministry of Trade, Industry and Fisheries, and comprises representatives from the industry.

Table 6. **MAIN MARKETING INVESTMENTS BY THE NORWEGIAN SEAFOOD COUNCIL (2014)**

	Marketing investments (million EUR)	Share of total investment
France	4,87	11%
Spain	3,29	8%
Germany	3,11	7%
Japan	2,87	7%
Norway	1,97	5%
Italy	1,91	4%
China	1,67	4%
Portugal	1,67	4%
Sweden	1,64	4%
UK	1,32	3%

Source: Norwegian Seafood Council.

The Norwegian Seafood Council (NSC) is the body marketing Norwegian seafood. Its generic marketing activity is financed through the export levy. NSC is a public company owned by the Ministry of Trade, Industry and Fisheries, and the Ministry appoints the board of directors. In 2014, NSC spent close to EUR 43,1 million on marketing investments, of which EUR 29,4 million (68%) was spent on farmed salmon and trout, EUR 3,2 million on pelagic species, EUR 2,9 million on white fish species, and EUR 7,4 million on other species and products. Most investments were made in the French, Spanish and German markets.

3.7. Certification schemes – branding

Over the past eight years, many Norwegian fisheries have been certified by the Marine Stewardship Council (MSC). These processes started with the saithe fisheries (northeast Arctic and North Sea) in 2008, followed one year later by the herring fisheries (North Sea and Skagerrak, and spring-spawning fishery), and in 2010, by the cod and haddock fisheries in the northeast Arctic. The last fishery awarded MSC certification was the coldwater shrimp fishery in the northeast Arctic in 2012.

Based on 2016 quotas, 660.000 tonnes of demersal fish (of which 401.000 tonnes of cod), 446.000 tonnes of herring and 70.000 tonnes of prawns are MSC certified. Coldwater shrimp fisheries in the Norwegian Skagerrak and Norwegian Deep are under assessment for MSC certification. The decision is expected in March 2016. This makes Norway the main supplier of fish from MSC certified fisheries in Europe.

A majority of the FAPs exported from Norway is labelled with: NORGE – Seafood from Norway. The trademark is



a collective brand logo and image for Norwegian seafood products. The owner and rights holder of the trademark is the Norwegian Seafood Council which also sets out the terms of use. The trademark can only be applied to products of Norwegian origin and products for human consumption. The brand can

also be used in co-branding with other brands (producer and retailer brands).

The Norway Seafood Council has also established a special quality brand for Skrei (migratory Norwegian Arctic cod, larger than three kg, harvested within the January to April period in natural spawning areas – Lofoten/Vesterålen).

Despite Norway's long fishing tradition and the huge efforts put into marketing seafood of Norwegian origin, only one Norwegian fishery product is registered as Protected Geographical Indication: Tørrfisk fra Lofoten (stockfish from Lofoten).

3.8. Investments abroad

Within the capture fishing sector, most Norwegian investments in Europe are related to investments in processing – both for pelagic and demersal species. Most of the processing facilities in question are located on the British Isles and Denmark. In addition to investments in Europe, Norway has also invested in the pelagic sector in South America – including fishing vessels and processing. This is mainly vessels delivering raw material for fishmeal and oil to factories owned by Norwegian companies.

The main investments by the Norwegian seafood industry are related to the salmon farming industry. In Europe, Norwegian companies hold a large share of the salmon farming operations in the UK and Ireland. In addition, Norwegian companies have also invested in the salmon farming industry on the Faroes Islands and Iceland. Norwegian investments have been made in first and secondary processing in Europe. Most of the investments in processing have come through acquisitions and mergers.

4. Consumption

FRESH PLAICE



Plaice is a right-eyed flatfish found from as far north as the White Sea and Iceland to the western Mediterranean Sea, along the coast of Europe. It is widely consumed in the northern European countries and is the most consumed flatfish in the UK. Plaice can be consumed grilled, shallow fried or baked.

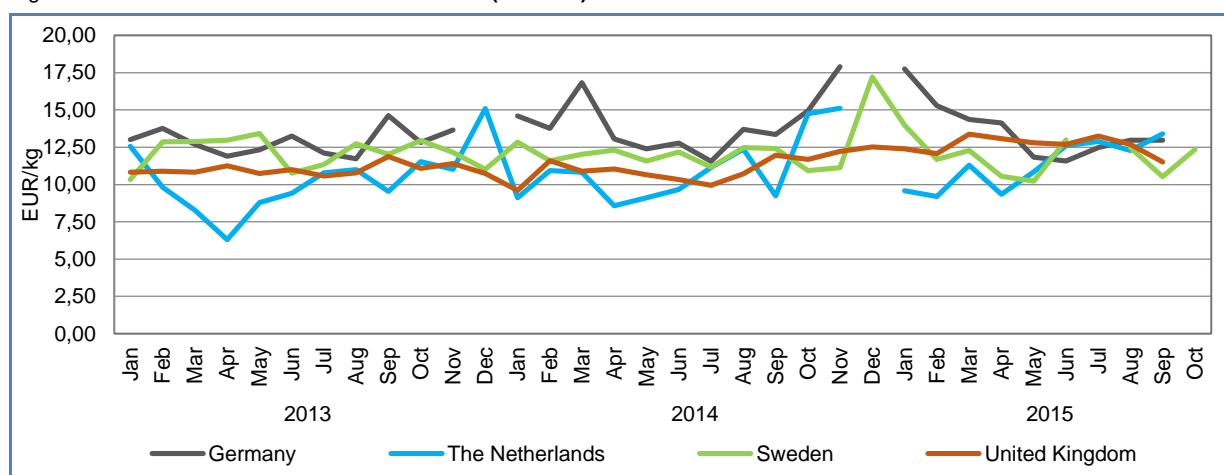
In **Germany**, retail prices of fresh plaice varied considerably between 11,56 EUR/kg and 17,89 EUR/kg in January 2013–September 2015. In November 2014–January 2015, the retail price of fresh plaice peaked at 17,82 EUR/kg, a 26% increase over the same reference period a year earlier. In the first nine months of 2015, the average retail price reached 13,71 EUR/kg, a 1% and 7% increase over January–September in 2014 and 2013, respectively.

In the **Netherlands**, the retail prices of fresh plaice varied considerably, ranging between 6,30 EUR/kg and 15,11 EUR/kg during January 2013–September 2015. The average price during January–September 2015 was 11,27 EUR/kg, 11% and 17% increase compared to 2014 and 2013, respectively. In November 2014, the retail price reached a 3-year high of 15,11 EUR/kg, 2% higher than the previous month and 37% higher compared to November 2013.

In **Sweden**, the retail prices of fresh plaice fluctuated significantly during January 2013–October 2015 and averaged 12,13 EUR/kg. In December 2014, the retail price peaked and reached its highest value, 17,21 EUR/kg, a 56% increase over December a year earlier. In May 2015, the price dropped to its lowest level of 10,22 EUR/kg. The average price during January–October 2015 was 11,90 EUR/kg, a 0,5% and 3% decrease from the same reference period in 2014 and 2013, respectively.

In the **United Kingdom**, the retail prices of fresh plaice varied between 9,61 EUR/kg and 13,37 EUR/kg, averaging 11,49 EUR/kg in January 2013–September 2015. In the first nine months of 2015, the average price was 12,65 EUR/kg, a 18% and 15% increase over January–September in 2014 and 2013, respectively. In March 2015, the retail price reached 13,37 EUR/kg, the highest for the surveyed period and registered an increase of 23% over both 2014 and 2013.

Figure 21. RETAIL PRICES OF FRESH PLAICE (EUR/KG)



Source: EUMOFA (updated 21.01.2015).

FRESH HERRING



Herring is an oily fish found throughout the North Atlantic with main stocks fished in the EU waters of the Baltics, the North Sea, and West of Scotland.²⁶ Herring has high energy value because of its fatty flesh. It is also rich in vitamins A, B, and D. Herring can be found on the market unprocessed, either whole or filleted; however, it is mostly sold smoked, salted, marinated, and canned.²⁷

Two types of herring are commonly available on the market, Atlantic and Baltic herring. The latter is smaller and less fatty and is usually less expensive than Atlantic herring.

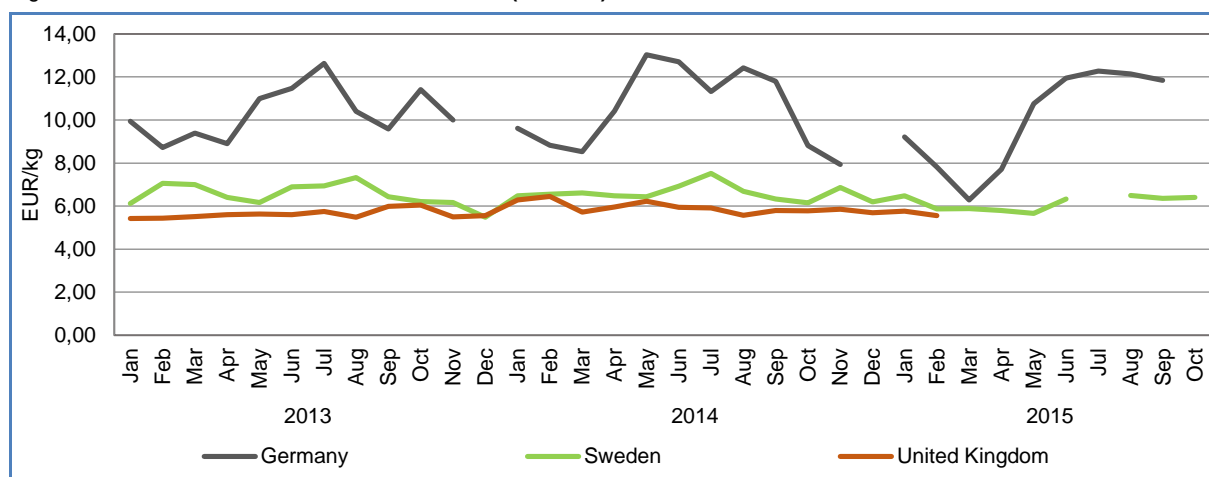
In **Germany**, where herring is the leading species in landings and third in consumption, after Alaska pollock and salmon, retail prices of fresh herring fluctuated

substantially, registering an average of 10,29 EUR/kg during January 2013–September 2015 and the highest price among the Member States surveyed. In March 2015, the price dropped to 6,28 EUR/kg, a 20% decrease from the previous month, and was the lowest price registered during the period surveyed. In the period January–September 2015, the average price reached 10,00 EUR/kg, a 9% and 2% decrease from the same reference periods in 2014 and 2013, respectively.

In **Sweden**, the retail price of fresh herring varied between 5,48 EUR/kg and 7,52 EUR/kg, averaging 6,45 EUR/kg in January 2013–October 2015. The highest price of fresh herring was registered in July 2014, an 8% increase over the same month a year earlier. In the first ten months of 2015, the average price reached 6,14 EUR/kg, a 7% and 8% decrease from 2014 and 2013, respectively.

In the **United Kingdom**, the retail price of fresh herring remained relatively stable and the lowest among the Member States surveyed during January 2013–February 2015. The average price for the period was 5,77 EUR/kg. The lowest price registered was 5,43 EUR/kg in January 2013, 16% lower than January 2014. The following month, February 2014, the price peaked at 6,44 EUR/kg and registered its highest value in the period surveyed.

Figure 22. RETAIL PRICES OF FRESH HERRING (EUR/KG)

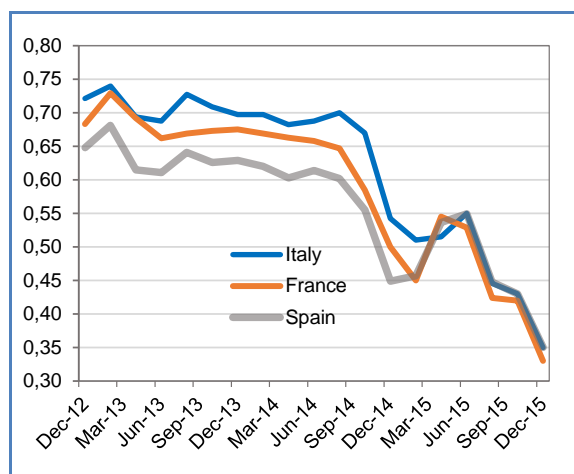


Source: EUMOFA (updated 21.01.2015).

5. Macroeconomic context

5.1. MARINE FUEL

Figure 23. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, BELGIUM, AND SPAIN (EUR/LITRE)**



Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, Belgium; Spain; ARVI and MABUX (May–December 2015).

In December 2015, the fuel price in the French ports of Lorient and Boulogne was 0,33 EUR/litre, 18% lower than in November 2015, and 34% lower than December 2014.

In the Italian ports of Ancona and Livorno, the average price of marine fuel in December 2015 was 0,35 EUR/litre. It fell 15% from the previous month and was 35% less than December 2014.

The price of marine fuel in the ports of A Coruña and Vigo, Spain, reached on average 0,35 EUR/litre in December 2015. It dropped 15% from November 2015 and was 22% less than December 2014.

5.2. FOOD AND FISH PRICES

Annual EU inflation was 0,2% in December 2015, up from 0,1% in November and –0,1% a year earlier. In December 2015, the lowest negative annual rates were registered in Bulgaria (–0,9%), Romania (–0,7%), and Cyprus and Slovenia (both –0,6%), while the highest annual rates were observed in Belgium (+1,4%), Malta (+1,2%), and Austria (+1,1%).

Compared with November 2015, annual inflation fell in 9 Member States, remained stable in 3, and rose in 15.

In December 2015, prices of food and non-alcoholic beverages decreased (–0,2%) and prices of fish and seafood increased (+0,9%) over the previous month (November 2015).

Since December 2013, food prices decreased 0,6%, while fish prices increased 3,1%.

Table 7. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2005 = 100)**

HICP	Dec 2013	Dec 2014	Nov 2015	Dec 2015 ²⁸
Food and non-alcoholic beverages	126,06	125,01	125,61	125,31
Fish and seafood	125,08	127,03	127,90	129,02

Source: Eurostat.

5.3. EXCHANGE RATES

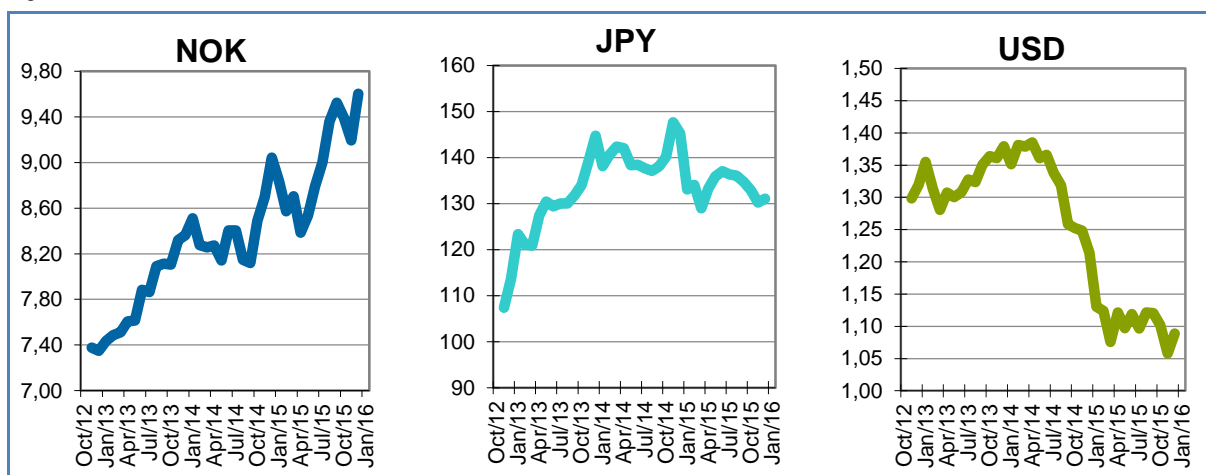
In December 2015, the euro appreciated against the Norwegian krone (4,5%) from November 2015. It also appreciated against the US dollar (2,9%) and the Japanese yen (0,7%). For the past six months, the euro has fluctuated around 1,10 against the US dollar. Compared with a year earlier (December 2014), the euro has appreciated 6,2% against the Norwegian krone and depreciated 10,3% and 9,8% against the US dollar and the Japanese yen, respectively.

Table 8. **THE EURO EXCHANGE RATES AGAINST THREE SELECTED CURRENCIES**

Currency	Dec 2013	Dec 2014	Nov 2015	Dec 2015
NOK	8,3630	9,0420	9,1935	9,6030
JPY	144,72	145,23	130,22	131,07
USD	1,3791	1,2141	1,0579	1,0887

Source: European Central Bank.

Figure 24. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

5.4. EUROPEAN UNION ECONOMIC OVERVIEW

In 2016, the EU inflation is expected to reach 0,7%. The inflation is expected to expand further to 1,4% and 1,6% in 2017 and 2018, respectively. In the long term, the inflation is predicted to reach 1,8% in 2020.²⁹

The EU GDP growth rate for 2016 is expected to increase 2,0%, up from 1,9% in 2015. In 2017, the GDP growth rate is foreseen to reach 2,1%. Economic expansion is expected due to growth in investments and rise of private consumption.³⁰

EUMOFA Monthly Highlights is published by the Directorate–General for Maritime Affairs and Fisheries of the European Commission.

Editor: European Commission, Directorate–General for Maritime Affairs and Fisheries, Director–General.

Disclaimer: Although the Maritime Affairs and Fisheries Directorate General is responsible for the overall production of this publication, the views and conclusions presented in this report reflect the opinion of the author(s) and do not necessarily reflect the opinion of the Commission or its officers.

© European Union, 2016
KL–AK–16–002–EN–N
Photographs ©Eurofish.

Reproduction is authorised, provided the source is acknowledged.

FOR MORE INFORMATION AND COMMENTS:
Directorate–General for Maritime Affairs and Fisheries
B–1049 Brussels
Tel: +32 229–50101
Email: contact-us@eumofa.eu

THIS REPORT HAS BEEN COMPILED USING EUMOFA DATA AND THE FOLLOWING SOURCES:

First sales: EUMOFA. Data analysed refers to the months January–November 2015 and November 2015.

Global supply: European Commission, Directorate–General for Maritime Affairs and Fisheries (DG MARE); EUMOFA; Argentinian Ministry of Agriculture; Ouest-France Entreprises; Aquaculture Stewardship Council; Industrias Pesqueras; fis.com.

Case study: Norwegian Directorate of Fisheries; Statistics Norway; Norwegian Seafood Council.

Consumption: EUMOFA; DG MARE; FAO.

Macroeconomic context: EUROSTAT; ECB, Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; ARVI, Spain; MABUX.

The underlying first-sales data is in a separate Annex available on the EUMOFA website. Analyses are made at aggregated (main commercial species) level.

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.



Publications Office
of the European Union

6. Endnotes

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

² http://www.puertos.es/en-us/estadisticas/Pages/estadistica_mensual.aspx

³ <http://www.apvigo.com/ficheros/descargas/3655.pesca.fresca.noviembre.pdf>

⁴ https://stecf.jrc.ec.europa.eu/documents/43805/1034590/2015-07_STECF+15-07+-+AER+2015_JRC97371.pdf

⁵ http://ec.europa.eu/newsroom/mare/itemdetail.cfm?item_id=27759

⁶ http://www.sussex-ifca.gov.uk/index.php?option=com_content&view=article&id=64&Itemid=160

⁷ http://www.sussex-ifca.gov.uk/index.php?option=com_content&view=article&id=73&Itemid=169

⁸ <http://www.dst.dk/Site/Dst/Udgivelser/GetPubFile.aspx?id=22255&sid=fisk>

⁹ https://stecf.jrc.ec.europa.eu/documents/43805/1034590/2015-07_STECF+15-07+-+AER+2015_JRCxxx.pdf

¹⁰ http://www.fao.org/fishery/culturedspecies/Mytilus_edulis/en

¹¹ <http://www.fao.org/fishery/species/3016/en>

¹² <https://www.msc.org/track-a-fishery/fisheries-in-the-program/certified/north-east-atlantic/dfpo-denmark-saithe/dfpo-denmark-saithe>

¹³ http://fis.com/fis/worldnews/search_brief.asp?l=e&id=81978&ndb=1&monthyear=1-2016&day=&country=0&df=1 EUMOFA.

¹⁴ http://www.minagri.gob.ar/site/pesca/pesca_maritima/04=informes/01-informes_de_coyuntura/archivos/100000-2015/151201_Informe%20de%20coyuntura%20-%20Diciembre%202015.pdf

¹⁵ http://www.industriaspesqueras.com/noticias/en_portada/46519/visto_bueno_de_bruselas_al_reparto_de_14000_toneladas_de_sardina_entre_espana_y_portugal_.html

¹⁶ <http://www.entreprises.ouest-france.fr/article/lorient-keroman-premier-ports-peche-francais-17-01-2016-250264>

¹⁷ http://www.asc-aqua.org/index.cfm?act=update_detail&uid=366&lng=1

¹⁸ EUMOFA. Partial data for 2015.

¹⁹ http://ec.europa.eu/fisheries/documentation/publications/2016-eu-fishing-fleet-economic-performance-infographic_en.pdf?subweb=347&lang=en

²⁰ <http://ec.europa.eu/fisheries/documentation/publications/poster-aquaculture-2016.pdf?subweb=347&lang=en>

²¹ <http://ec.europa.eu/avservices/video/player.cfm?ref=I108971&sitelang=en&videolang=FR&subweb=347&lang=en>

²² http://ec.europa.eu/newsroom/mare/itemlongdetail.cfm?item_id=27471&subweb=343&lang=en

²³ EUMOFA: The EU fish market 2015 edition.

²⁴ <http://www.ssb.no/befolkning/artikler-og-publikasjoner/attachment/225818?ts=14d005cc3c8>

²⁵ <https://www.ssb.no/statistikkbanken/SelectVarVal/saveselections.asp>

²⁶ http://ec.europa.eu/fisheries/marine_species/wild_species/herring/index_en.htm

²⁷ <http://www.fao.org/wairdocs/tan/x5933e/x5933e01.htm>

²⁸ Estimated provisional.

²⁹ https://www.ecb.europa.eu/press/pr/date/2016/html/pr160122_1.en.html

³⁰ http://europa.eu/rapid/press-release_IP-15-5996_en.htm