



E U M O F A

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MONTHLY HIGHLIGHTS

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First sales in Europe

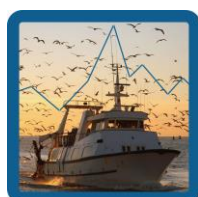
Focus on Denmark (*Crangon* shrimp
and sole) and
Greece (anchovy and hake)

Global Supply

Case study: Atlantic bluefin tuna
market in the EU

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In January–April 2016, Norway lobster first-sales value increased in Denmark, France and the UK. Sole first-sales value decreased in both Belgium and France, but increased in the UK (+19%). Monk first-sales value and volume increased in the UK but decreased in France. Mackerel increased in both UK and France, and decreased in Portugal.

In April 2016, Norway lobster value increased in Denmark and France, but decreased in the UK. Herring volumes declined in Estonia, but increased in Latvia and Sweden. Sprat volumes increased remarkably in Sweden (+46%) and marginally in Latvia.

In Denmark landings for industrial purposes represent more than 70% of the volume and 30% of the value of total catches. Denmark landings concentrate on cod, herring, Norway lobster, plaice and saithe. In January–April 2016 first sale prices strongly increased, in particular for *Crangon* shrimp and sole.

In Greece (Piraeus), in January–April 2016, first-sales value and volume increased 7% and 15% respectively, due to positive trends shown by all main species: anchovy, hake, red mullet and sardine.

In the first quarter of 2016, Spanish exports of fish and seafood products (canned and prepared) amounted to 40.013 tonnes (+13%) worth EUR 170 million (+15%) compared with the same period last year.

The Atlantic bluefin tuna fishing season in the western and central Mediterranean Sea and in the Adriatic Sea was open from 26 May to 24 June 2016 for purse-seiners. Most European vessels had fished their quotas by early June. The 2016 quota was 40% higher than two years ago. Spain, France and Italy, with 85% of the EU's quota reaped the greatest benefit from this increase. First-sales prices in certain auctions declined on the back of increased volume. Exports are likely to increase following the trend observed since 2010 (+50%). On the EU's Mediterranean coast consumption of fresh bluefin tuna is increasing.

Retail prices of fresh mussel exhibited high seasonal fluctuations in the Netherlands, whereas in France and Italy they showed an increasing trend.

1. First sales in Europe

In **January–April 2016**, eleven EU Member States and Norway reported first-sales data for ten commodity groups.¹ Estonia is the new Member State which joined the pool of the reporting countries. Both first-sales value and volume increased over the previous year (January–April 2015) for Greece, Lithuania and the UK.

In **Belgium** in **January–April 2016**, first sales decreased in both volume (–5%) from January–April 2015) and value (–2%) but remained slightly over the levels of January–April 2014 (+1% in volume and +2% in value). In **April 2016**, first sales continued to decrease in volume (–6% compared with April 2015 and –9% compared with April 2014). Sole, the leading species, experienced a sharp decrease in landed volume (381 tonnes in April 2016, down from 449 tonnes in April 2015 and 583 tonnes in April 2014), only partially offset by a higher average unit price (+11% over April 2015 and +38% over April 2014). Inversely, plaice and turbot registered positive gains, in both volume (+11% for plaice and +19% for turbot) and value (+32% and +13%, respectively).

In **Denmark** in **January–April 2016**, first-sales value increased 16%, while volume had the opposite trend (–19%), compared with January–April 2015. In **April 2016**, the same trends were observed; value was EUR 23,66 million (+24%), and volume ended at 13,495 tonnes (–6%), compared with April 2015. See more in Section 1.1.

In **January–April 2016**, **Estonia** saw decreases in both first-sales value and volume (–3% and –7%, respectively) from the same period a year before. First sales had the same trend in **April 2016**, –16% in value and –31% in volume, compared with April 2015. The decreases were mainly the result of sprat and herring. However, the average price of all species sold in April 2016 increased 20%.

In **France** in **January–April 2016**, first sales experienced a slight decrease from January–April 2015, in both value (–2%) and volume (–1%), widely attributable to cephalopods. In **April 2016**, first sales decreased in both value and volume (–2% and –3%, respectively, from April 2015), while the average unit price remained stable. Norway lobster experienced significant increases (+19% in value and +36% in volume over April 2015) and was the leading species, ahead of monk and sole, despite a substantial price fall from 10,38 EUR/kg in April 2015 to 9,05 EUR/kg in April 2016. Remarkable increases in value were also recorded for megrim (+41%), whiting (+25%), and octopus (+17%). The most notable decreases in value were recorded for seabass (–39%), squid (–39%), and saithe (–36%).

In **Greece**, first sales rose 7% in value and 15% in volume in **January–April 2016** over the same period in 2015. **April 2016** experienced a positive evolution of volume (+12% over April 2015) but registered a slight decrease in volume (–1%). See more in Section 1.1.

In **Italy** in **January–April 2016**, first sales decreased strongly in volume (–17% from the same period in 2015) but grew slightly in value (+1%). This situation was

caused mainly by anchovy (–69% in volume). The average price of anchovy increased 71%, from 1,07 EUR/kg in January–April 2015 to 1,83 EUR/kg. In **April 2016**, first sales decreased in volume (–16%) and in value (–5%). Except for red mullet (–9%), all main commercial species experienced increases in average price, e.g. +23% for hake and +11% for cuttlefish.

Latvia experienced decreased first-sales value (–10%) and increased first-sales volume (+3%) in **January–April 2016**, compared with January–April 2015. The average price of all species sold fell 13%. This was primarily because of a decline (–16%) in the value of sprat first sales due to decreased demand from the processing industry for sprat as raw material, as a direct consequence of the Russian embargo. The same trend was observed in **April 2016**, compared with April 2015. Sprat contributed substantially to the overall decrease in first-sales value. The decrease in first-sales volume was the result of sprat and smelt.

In **Lithuania** in **January–April 2016**, first sales increased in both value (+14%) and volume (+16%) over the same period in the previous year. In **April 2016**, the first-sales value and volume experienced substantial increases (+53% and +69%, respectively), because of cod and European flounder. By contrast, the average price of all species sold fell 9% in April 2016.

In **Norway**, first-sales value in **January–April 2016** increased 7%, to EUR 934,98 million. The volume decreased 8% to 1,26 million tonnes. The increase in first-sales value was mainly the result of a higher landed volume and first-sales prices for cod and herring. In **April 2016**, first-sales value was EUR 188,5 million, a 12% decrease over April 2015. The volume decreased 29%, to 233,230 tonnes. This was mainly the result of lower landed volume of cod (–10%) and blue whiting (–43%).

In **Portugal**, first sales decreased substantially in **January–April 2016** in both volume (–19% from the same period in 2015) and value (–6%), but the latter remains above the 2014 level (+2%). In **April 2016**, first sales decreased strongly in volume (–32% from April 2015). The decrease in value was more limited (–21%) because of a smaller proportion of lower-priced small pelagics, whose share in total first-sales value fell from 30% in April 2015 to 22% in April 2016. Small pelagics decreased 40% in value and volume, affected by the management decisions on sardine (no fishing in April) and the decrease in horse mackerel landings. Octopus, the leading species, represented 21% of the total value and registered a decrease in volume (–12%), value (–15%) and prices (–3%) from April 2015.

Spain landed 67,582 tonnes of fresh fish in **January–April 2016**, 4% less than in January–April 2015 and 7% less than in January–April 2014. This trend was in contrast with **April 2016**, when Spain landed 20,993 tonnes of fresh fish, 19% more than in April 2015. Of the 21 reporting fishing ports, 12 recorded decreases in volume from the same month last year. The highest landings were in Vigo, 5,333 tonnes (–5%). Megrim (–32%), and swordfish (–60%), contributed most to the decrease.²

In **Sweden**, first-sales value and volume decreased in **January–April 2016**, at EUR 28,8 million (–4%) and 55.910 tonnes (–17%) from the same period in 2015. This was mainly caused by lower landings of sprat (–14%) and herring (–13%), while the first-sales price of these two species increased slightly to 0,25 EUR/kg and 0,31 EUR/kg, respectively. In **April 2016**, first-sales value increased less than 1% over April 2015, at EUR 5,97 million. The first-sales volume was 9.630 tonnes (–7%).

In the **UK** in **January–April 2016**, first-sales value increased 5%, to EUR 241,1 million. First-sales volume in the same period was 145.320 tonnes (+5%). The increase in first-sales volume was mainly because of a higher UK quota of mackerel in 2016 over 2015, leading to larger landings (+19%). Also first-sales price for mackerel increased (+3%) from January–April 2015. In **April 2016** first-sales value and volume decreased 20% and 26%, respectively, to EUR 46,1 million and 21.860 tonnes. Declining landings of scallop (–26%) and hake (–31%) contributed mostly to the decrease.

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

Country	January–April 2014		January–April 2015		January–April 2016		Change from January–April 2015	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	6.304	23,26	6.660	24,14	6.359	23,74	–5%	–2%
Denmark	70.099	69,64	70.083	79,08	56.800	92,10	–19%	16%
Estonia	n/a	n/a	27.607	6,08	25.670	5,90	–7%	–3%
France	66.774	199,85	65.247	216,50	64.397	212,78	–1%	–2%
Greece*	3.335	10,47	3.322	9,54	3.808	10,23	15%	7%
Italy*	2.673	15,38	2.678	14,90	2.211	14,99	–17%	1%
Latvia	27.061	7,76	24.041	5,97	24.758	5,37	3%	–10%
Lithuania*	523	0,41	688	0,52	800	0,60	16%	14%
Norway	1.184.288	750,68	1.258.349	871,64	1.154.261	934,98	–8%	7%
Portugal	25.274	48,60	25.738	52,67	20.867	49,33	–19%	–6%
Sweden	80.146	33,30	67.518	30,09	55.912	28,80	–17%	–4%
United Kingdom	162.761	242,66	138.495	229,25	145.318	241,11	5%	5%

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

Country	April 2014		April 2015		April 2016		Change from April 2015	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.624	5,80	1.576	6,16	1.483	6,18	–6%	0%
Denmark	15.015	17,86	14.364	19,15	13.495	23,66	–6%	24%
Estonia	n/a	n/a	5.605	1,29	3.895	1,08	–31%	–16%
France	17.812	51,43	17.097	55,03	16.556	53,69	–3%	–2%
Greece*	878	2,56	985	2,59	1.107	2,55	12%	–1%
Italy*	709	4,12	679	4,04	572	3,86	–16%	–5%
Latvia	5.658	1,43	4.680	1,17	5.214	1,13	11%	–3%
Lithuania*	178	0,15	139	0,09	235	0,14	69%	53%
Norway	302.218	141,67	328.105	213,31	233.231	188,49	–29%	–12%
Portugal	8.448	13,92	9.861	16,33	6.697	12,91	–32%	–21%
Sweden	11.058	6,28	10.304	5,96	9.633	5,97	–7%	0%
United Kingdom	18.130	37,28	29.487	57,32	21.861	46,11	–26%	–20%

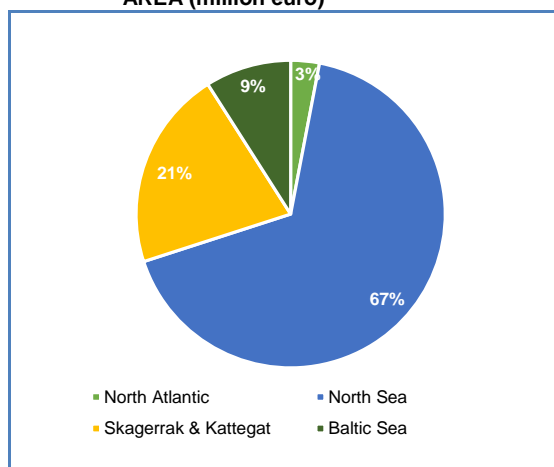
Source: EUMOFA (updated 13.06.2016); volume data is reported in net weight.

*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 Klaipėda fish auction.

1.1. DENMARK

The Danish fishing fleet is highly diversified. It comprises vessels of different sizes, uses a variety of gears and targets several species, both for human consumption and industrial use. The fleet operates predominantly in the North Sea, Baltic Sea, and the North Atlantic. A small-scale fishing fleet, vessels shorter than 12 m, uses static gears and operates in the Baltic Sea, the Sounds, and the Skagerrak and Kattegat. Most catches landed by Danish vessels take place in the Atlantic Ocean; 9% of landings originate in the Baltic Sea.

Figure 1. **VALUE OF DANISH LANDINGS BY FISHING AREA (million euro)**

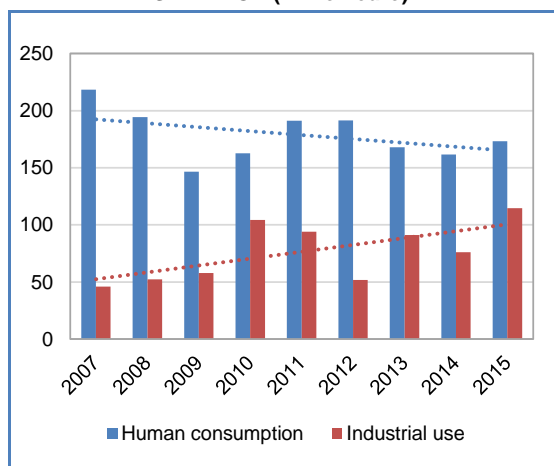


Source: Danish Agrifish Agency (updated 13.06.2016).

Overall, the fleet has decreased by more than 25% in the past 10 years, reaching approximately 2.000 vessels (2015). Most of the fleet (about 80%) is composed of small-scale vessels. Vessels longer than 24 m account for less than 3%, but they represent more than 63% of the total gross tonnage.

The species targeted for human consumption include cod, plaice, saithe, Norway lobster, herring, mackerel, and shrimp. In addition, the fleet catches species used for the production of fishmeal and fish oil, such as sandeel, sprat, and blue whiting.³

Figure 2. **VALUE OF DANISH LANDINGS BY DESTINATION (million euro)**

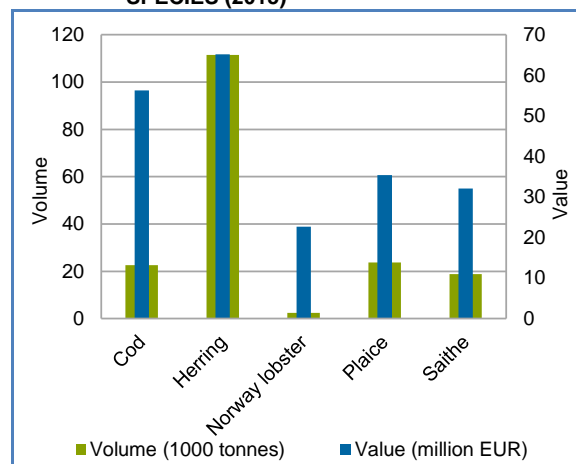


Source: Danish Agrifish Agency (updated 13.06.2016).

Landings for industrial purposes represent more than 70% of the volume, and approximately 30% of the value of total catches landed by the Danish fleet. They have increased in recent years, mainly because of a significant increase in the sandeel quota. In contrast, the value of fish landed for human consumption experienced an opposite trend.

In 2015, the first-sales value of the fish landed in Denmark for human consumption reached EUR 318 million at 266.000 tonnes, and an average price of 1,19 EUR/kg, 7% higher than the previous year. The top five species landed represented 66% of total first-sales value.

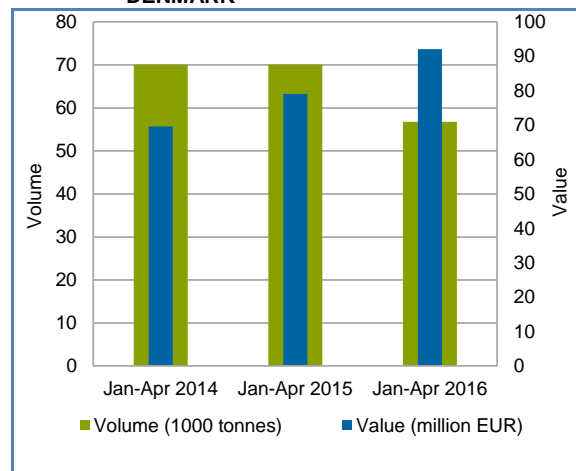
Figure 3. **FIRST SALES IN DENMARK BY MAIN SPECIES (2015)**



Source: EUMOFA (updated 13.06.2016).

In January–April 2016, the accumulated first-sales value of all reported species increased 16% in value and decreased 19% in volume compared with the same period last year. The average unit price of all landings increased 44%, reaching 1,62 EUR/kg.

Figure 4. **JANUARY–APRIL FIRST SALES IN DENMARK**

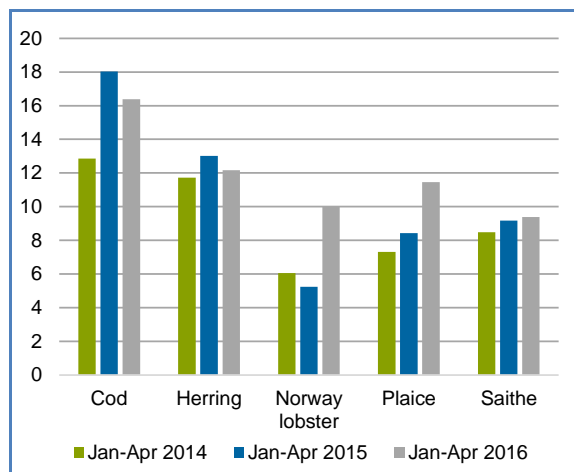


Source: EUMOFA (updated 13.06.2016).

The increase in first-sales value was caused by several species, including the average unit price of Norway

lobster 10,45 EUR/kg (+20%), plaice 1,78 EUR/kg (+21%), sole 9,42 EUR/kg (+18%) and *Crangon* shrimp at 7,46 EUR/kg (+170%). The decrease in volume was caused by herring (-37%) cod (-20%), and mussel (-7%).

Figure 5. **JANUARY–APRIL FIRST SALES IN DENMARK BY MAIN SPECIES (million EUR)**



Source: EUMOFA (updated 13.06.2016).

1.1.1. CRANGON SHRIMP



Shrimp *Crangon* spp, also known as brown shrimp or common shrimp, are most commonly found in the North Sea. They are rather

small (5–7 cm), and can live for up to three years. Shrimp *Crangon* spp are found in sandy and muddy bottoms in shallow coastal waters. In summer they stay close to the coast, where the water is warmer. In winter, they live farther out at sea in areas that have not yet cooled.

During the day they live buried in sand or mud, and at night they migrate with the tides in search of food. Shrimp are not particular about what they eat: algae, snails, small worms, i.e. anything available.

Their colour varies from pale milky to pebble grey, depending on the seabed. Special pigment cells within their skin enable shrimp to camouflage themselves.

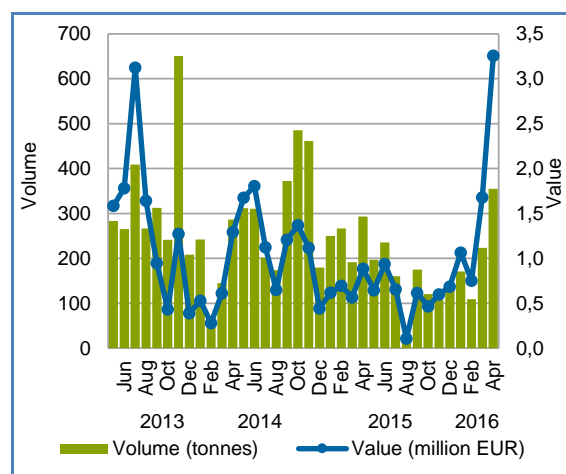
Typically, Danish fishermen catch brown shrimp with beam trawlers. Fishing takes place the whole year, with peaks in April–May and September–November.⁴

Brown shrimp are landed on all Danish, German and Dutch coasts. Esbjerg, Havneby and Hvide Sande are the top three Danish ports where brown shrimp are landed and sold.

The Danish Fishermen Producers Organisation (DFPO) together with fishery organisations from Germany and the Netherlands started the process for the Marine Stewardship Council (MSC) certification for their brown shrimp fishery, for the production of approximately 30.000 tonnes of brown shrimp per year. On the market, 90% of the brown shrimp is available cooked and peeled.

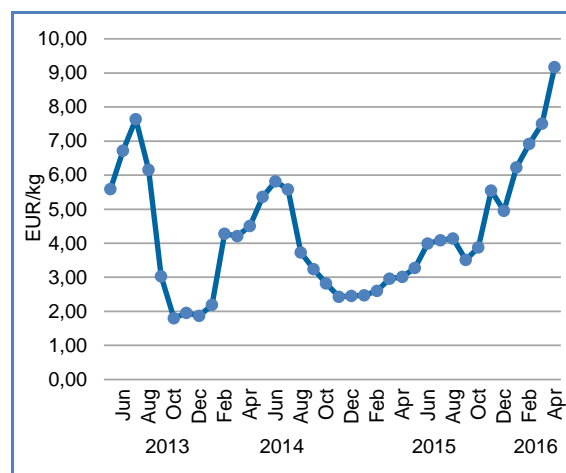
In January–April 2016, the accumulated first sales of shrimp, at EUR 6,75 million, increased 144% in value corresponding to 858 tonnes (-14%), compared with January–April 2015. First sales went up in both value (+149%), and volume (+16%) over January–April 2014. In April 2016, first-sales showed the same trend: +269% in value and +21% in volume, compared with April 2015.

Figure 6. **CRANGON SHRIMP: FIRST SALES IN DENMARK**



Source: EUMOFA (updated 13.06.2016).

Figure 7. **CRANGON SHRIMP: FIRST-SALES PRICE IN DENMARK**



Source: EUMOFA (updated 13.06.2016).

In January–April 2016, the average unit price of shrimp was 7,46 EUR/kg, 170% and 96% higher than the same period in 2015 and 2014, respectively. In April 2016, the average unit price was 9,17 EUR/kg, the highest in the past three years, corresponding to 355 tonnes.

1.1.2. SOLE



Common sole (*Solea solea*) is a long-lived flatfish that lives partly buried in sandy and muddy bottoms in shallow waters, searching for camouflage.

During winter sole migrates to deeper waters. The species feeds during the night, on small bottom animals. Common sole is distributed from the Eastern Atlantic (including the North Sea and western Baltic) to the Mediterranean Sea.

Spawning takes place in shallow coastal waters mainly in February–May (e.g. off the coasts of Galicia, Spain). In warmer waters (such as in the Mediterranean), spawning can occur at the beginning of winter. Juveniles remain in nursery areas for 2 to 3 years before moving to deeper water to join the adult stock.⁵

Most of the sole catches come from the North Sea, as well as the English Channel and the Skagerrak. The season starts in January and peaks between March and April. Sole is caught using several gears, of which beam trawlers are the most important. It is caught in fixed-net fishery targeting sole, as well as multispecies fishery (e.g. with plaice, cod, rays, brill, turbot, and monk). The minimum landing size of sole is 24 cm.

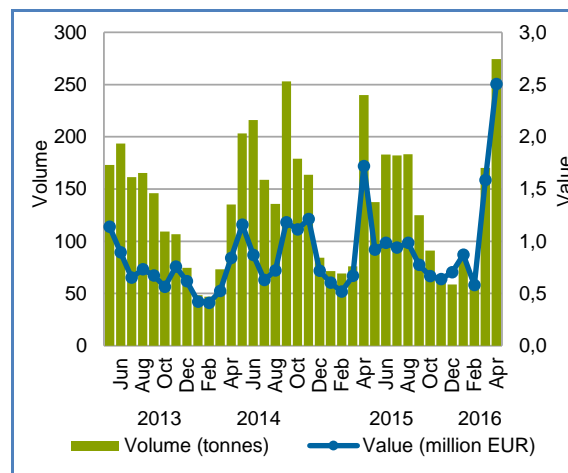
Catches are seasonal and are subject to total allowable catches (TACs). Denmark's 2016 quota for sole is 833 tonnes, 33% higher than in 2015, representing approximately 4% of the EU TACs. The Danish fleet operates mainly in the Norwegian Sea, North Sea, Skagerrak and Kattegat.

The top three ports for landing sole are Thyborøn, Hvide Sande, and Hanstholm.

On the market, common sole is sold mainly whole and fresh, occasionally frozen, whole, or filleted.

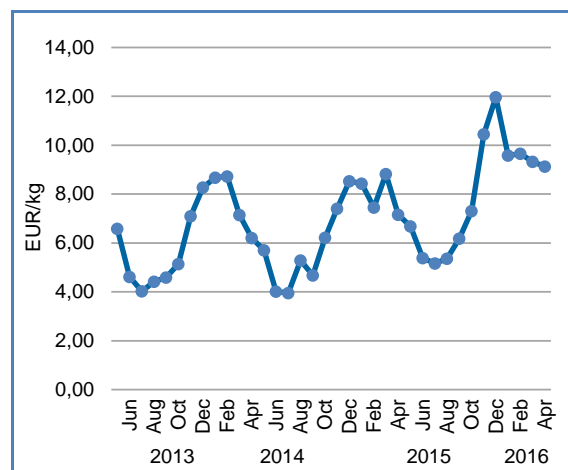
In January–April 2016, the accumulated first sales of sole were worth EUR 5,54 million (+58%) for 595 tonnes (+30%), compared with January–April 2015. Compared with the same period in 2014, first-sales value exhibited the same trend: increase in value (+153%) and volume (+96%).

Figure 8. SOLE: FIRST SALES IN DENMARK



Source: EUMOFA (updated 13.06.2016).

Figure 9. SOLE: FIRST-SALES PRICE IN DENMARK



Source: EUMOFA (updated 13.06.2016).

In January–April 2016, the average unit price of sole was 9,42 EUR/kg, 18% and 23% higher than the same period in 2015 and 2014, respectively. The highest average unit price in the period May 2013–April 2016 was in December 2015 at 11,97 EUR/kg corresponding to 59 tonnes.

1.2. GREECE

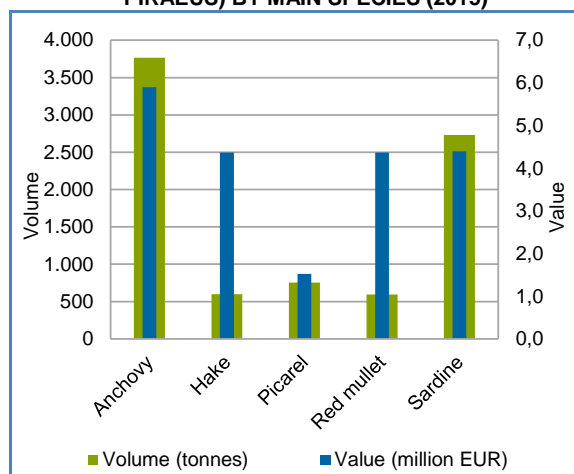
The national fleet in Greece has seen a declining trend in the past years, falling to approximately 15.000 fishing vessels. Also, the average vessel age has risen.

The Greek fleet includes a broad range of vessel types, of which over 90% are small-scale vessels (less than 12 meters), using polyvalent passive gears. These vessels are fishing typically in the isolated and less developed areas, contributing therefore to local economies. The smaller vessels often receive higher prices than larger vessels for their catches because of the very short supply chain.⁶

Other vessel groups - approximately 5.700 motor-propelled fishing vessels, work in overseas fishery (trawlers which fish in the Atlantic Ocean), open-sea fishery (trawlers and purse-seiners) and inshore fishery (purse-seiners and other fishing vessels).⁷

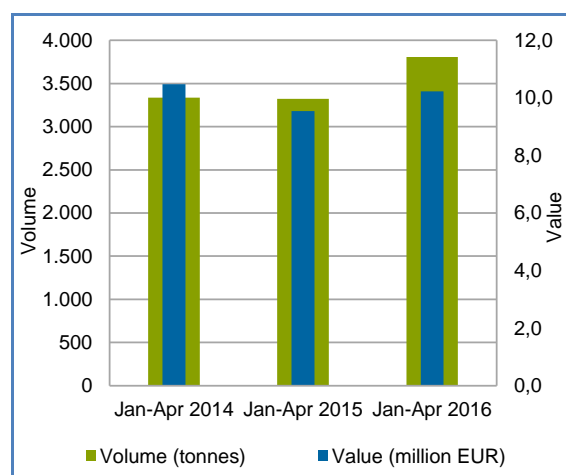
In 2015, Greek vessels landed 11.660 tonnes of fish, crustaceans, and molluscs in the port of Piraeus, an 8% increase over 2014. First-sales value decreased 6%, ending at EUR 29,88 million. Piraeus first-sales represent 35% of total landings made in Greece.

Figure 10. **FIRST SALES IN GREECE (PORT OF PIRAEUS) BY MAIN SPECIES (2015)**



Source: EUMOFA (updated 13.06.2016).

Figure 11. **JANUARY–APRIL FIRST SALES IN GREECE (PORT OF PIRAEUS)**

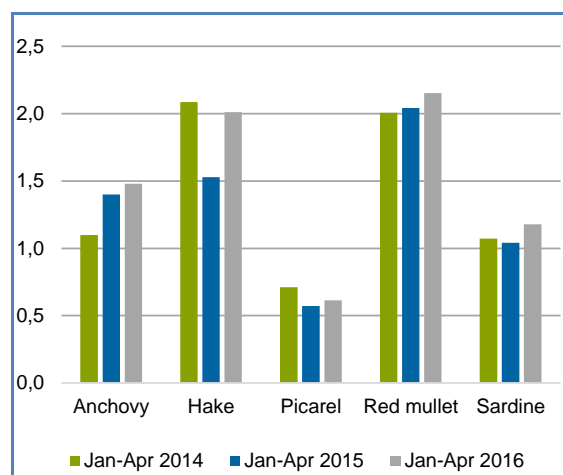


Source: EUMOFA (updated 13.06.2016).

In January–April 2016, the first-sales value and volume in Piraeus increased 7% and 15% over the corresponding period of the previous year, ending at EUR 10,23 million and 3.800 tonnes. This is mainly the result of larger landings of the most common species landed, especially sardine (+44%). Compared with January–April 2014, first-sales value decreased 2% while the volume increased 14%.

In January–April 2016, the top five species landed in Greece – red mullet, hake, anchovy, sardine, and picarel – represented 73% of the total first-sales value and 81% of the volume. The top five species increased 13% in first-sales value and 21% in volume over 2015.

Figure 12. **APRIL FIRST SALES IN GREECE (PORT OF PIRAEUS) BY MAIN SPECIES (million EUR)**



Source: EUMOFA (updated 13.06.2016).

1.2.1. ANCHOVY



European anchovy (*Engraulis encrasicolus*) can commonly be found in the Northeast and Central Atlantic, from the south of Norway, through the

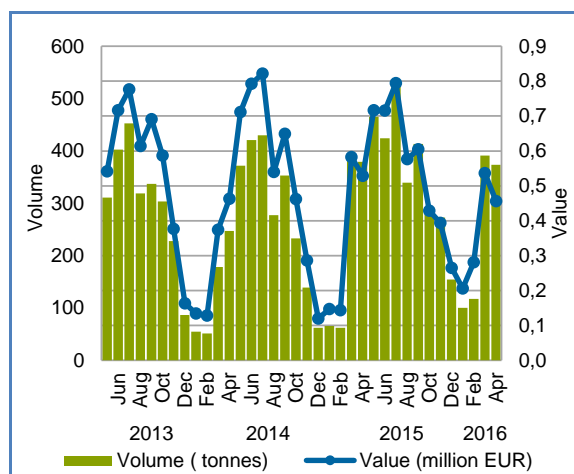
English Channel, in the area around the UK and Ireland, to the Bay of Biscay. It can also be found in the Mediterranean and Black seas.

Anchovy is a pelagic schooling species that can be located at depths of 400 m. In summer, it commonly migrates to normally colder waters before returning to the Mediterranean in winter. Spawning occurs from April to November with peaks usually in the warmest months. Spawning depends heavily on seawater temperature, leading to some restrictions in northern areas.

Main gears used to catch anchovy are purse-seines, lampara nets, beach-seines, and midwater trawls in winter. It is commonly marketed as canned and salted, but also fresh or frozen.⁸

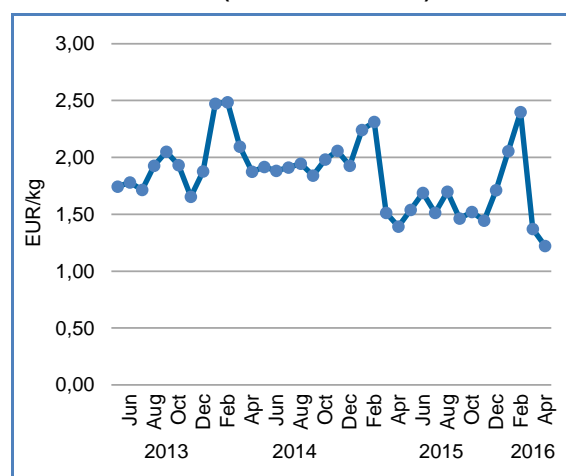
First-sales value of anchovy in the port of Piraeus in January–April 2016 was EUR 1,48 million, a 6% increase over the corresponding period the previous year. The volume increased 10% over January–April 2015, at 981 tonnes. A similar trend was observed compared with January–April 2014, with first-sales value and volume increasing 35% and 85%, respectively.

Figure 13. ANCHOVY: FIRST SALES IN GREECE (PORT OF PIRAEUS)



Source: EUMOFA (updated 13.06.2016).

Figure 14. ANCHOVY: FIRST-SALES PRICE IN GREECE (PORT OF PIRAEUS)



Source: EUMOFA (updated 13.06.2016).

The average unit price in 2015 was 1,56 EUR/kg (~20%), with the price fluctuating between 1,39 EUR/kg (April) and 2,24 EUR/kg (January) through the year.

The average unit price in January–April 2016 was 1,51 EUR/kg, a 4% decrease from January–April 2015. The highest average unit price in the period surveyed (May 2013–April 2016) was in February 2014 at 2,49 EUR/kg.

1.2.2. HAKE



European hake (*Merluccius merluccius*) can be found along the Atlantic coast of Europe from the north of Norway to western North Africa.

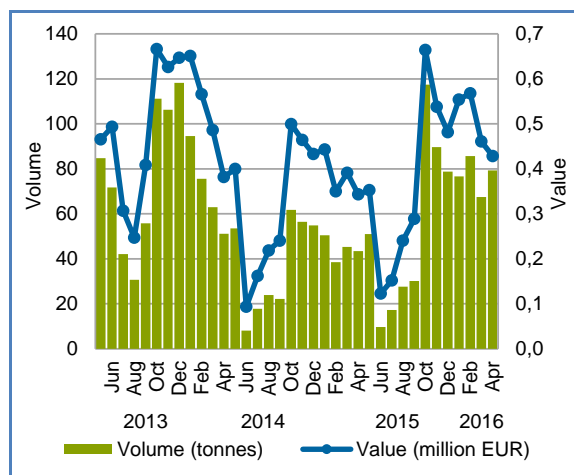
It can also be found around Iceland and in the Mediterranean and Black seas.

European hake is commonly found between 70 and 400 m. It lives close to the bottom during daytime and moves to pelagic waters at night. The spawning period varies with the area: December–June in the Mediterranean, February–May in the Bay of Biscay, April–July around Iceland, and May–August off the coast of Scotland. In the Mediterranean, spawning occurs at depths between 100 and 300 m.

Hake is commonly caught by bottom and pelagic trawls, longlines, bottom-set gillnets lines, and Danish seines. It is mainly marketed as fresh, but also frozen, dried, salted, and canned.⁹

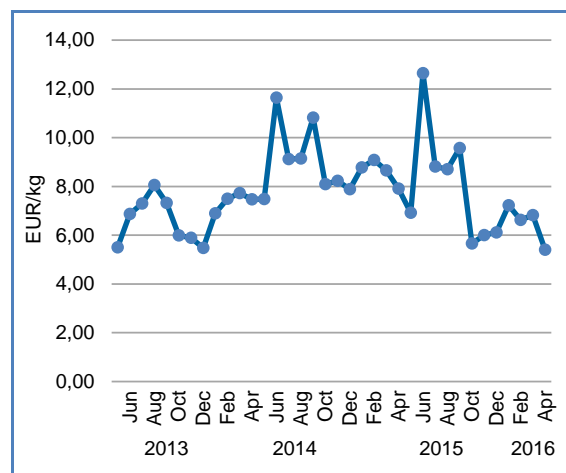
In January–April 2016, first-sales of hake were EUR 2 million and 309 tonnes. This was a 32% increase in value and a 74% increase in volume over January–April 2015. Compared with the same period in 2014, first-sales value decreased 4% while volume increased 9%.

Figure 15. HAKE: FIRST SALES IN GREECE



Source: EUMOFA (updated 13.06.2016).

Figure 16. HAKE: FIRST-SALES PRICE IN GREECE



Source: EUMOFA (updated 13.06.2016).

The average unit price fluctuated throughout 2015, from 12,65 EUR/kg (June) to 5,65 EUR/kg (October). The average unit price in 2015 was 7,29 EUR/kg, an 8% decrease from 2014.

The average unit price in January–April 2016 was 6,30 EUR/kg, a 24% decrease from the corresponding period in 2015.

2. Global Supply

Trade / World: The value of global trade in fishery products decreased in 2015, contrary to the long-term trend. The drop was the result of a range of factors: the strengthening of the US dollar against many other currencies, the effects of El Niño, and the economic slowdown of important emerging markets. In 2016, however, more stability is expected overall, and a rebound in the value of trade is possible in the second half of the year. Prices fell for most fish products, except for salmon, resulting from a shortage of supplies.¹⁰

EU / CFP: An agreement has been reached between the European Parliament, the Council and the European Commission, on how to better protect deep-sea fish, sponges and corals. As a result, fishermen may only target deep-sea fish in areas where they have fished in the past - their so-called "fishing footprint". Trawls below 800 m will be banned in the EU waters, and areas with vulnerable marine environments will be closed to bottom fishing below 400 m.¹¹

Resources / Baltic Sea: A new multi-annual plan for stocks of cod, herring and sprat in the Baltic Sea and the fisheries exploiting those stocks, also known as the "Baltic Plan" has been adopted by the European Parliament. The plan will facilitate decentralised decision making for technical measures, and it aims to prevent waste and to utilise all the fish that is caught.¹²

Resources / Cod: The Council of Fisheries Ministers and the European Parliament reached a political agreement to amend the long-term cod recovery plan, in line with the new Common Fisheries Policy. The new plan will simplify the rules on allowable catch limits and will give more flexibility to fishermen.¹³

Resources / Anchovy: Based on the good condition of the anchovy stock, the EU Council approved a 32% increase in the 2016 TACs, from 25.000 to 33.000 tonnes. Of these, 29.700 tonnes are for Spain, and 3.300 for France. However, the French quota will end at 5.050 tonnes, due to an additional 1.750 tonnes, transferred by Spain to France.¹⁴

Fisheries / World / Sustainability: A key international treaty aimed at combating illegal fishing has come into force. The Port State Measures Agreement (PSMA), adopted and promoted by the United Nations' Food and Agriculture Organisation (FAO), will prevent, deter, and eliminate illegal, unreported, and unregulated (IUU) fishing. It allows countries to keep illegal operators out of their ports and prevent them from landing illegal catches.¹⁵

Fisheries / Iceland: The total catch of Icelandic vessels was 104.187 tonnes in May 2016, 26% less than in May 2015. The decrease was caused mainly by blue whiting (-42%) and was not offset by higher cod catches (+20%). On a year-to-year basis (June 2015–May 2016), the total catch decreased 16%, owing mostly to capelin (-71%) and herring (-27%).¹⁶

Certification / Fish oil / Fishmeal / Antarctic krill: a French company has achieved the Friend of the Sea (FOS) certification for omega-3, fish oil, and fishmeal made from European anchovy and sardine. The fish is caught by Moroccan purse-seiners in the east-central area of the Atlantic Ocean. A Ukrainian factory trawler has achieved FOS certification for Antarctic krill.¹⁷

Certification / Pelagic species / Albacore tuna: A Faroese pelagic fishery has achieved Marine Stewardship Council (MSC) certification for mackerel, herring, and blue whiting. The fishery consists of 11 fishing vessels, employing more than 300 fishermen. Landings amount to more than half a million tonnes of fish each year. A Spanish artisanal fishery operating in the Bay of Biscay and the North Atlantic achieved MSC certification for albacore tuna. The fish is caught using trolling and pole-and-line methods.¹⁸

Certification / Aquaculture / Germany: A German firm achieved Friend of the Sea (FOS) certification for gilthead seabream, yellowtail kingfish, and European seabass produced in recirculation plant. The company's farm includes four saltwater fish pools and can produce approximately 500 tonnes of fish annually.¹⁹

Aquaculture / Scotland: In 2015, Scottish shellfish aquaculture production was estimated at EUR 13,6 million (GBP 10,1 million). Since 2014, there has been an 83% increase in queen scallop production and a 38% decrease in scallop production. Mussels and Pacific oysters were the main species produced, reaching 7.270 tonnes (-5%) and 5 million shells (-21%), respectively.²⁰

Aquaculture in the EU – Tapping into Blue Growth: A new infographic highlighting the main priorities for facilitating the sustainable development of EU aquaculture is now available. Find it [here](#).²¹

EU small-scale coastal fleet: A new infographic highlighting the status of the EU small-scale coastal fleet is now available. Find it [here](#).²²

Trade / Spain: In January–March 2016, Spanish exports of fish and seafood products (canned and prepared) were worth EUR 170 million (+13%) at 40.013 tonnes (+15%) compared with the same period last year. After declining for two years (2014 and 2015), Spanish exports have almost returned to their 2013 level. The main export product is canned tuna. More than 80% of the exports value is with EU Member States, but the share of extra-EU trade increased from 14% in 2013 to 16% in 2016.²³

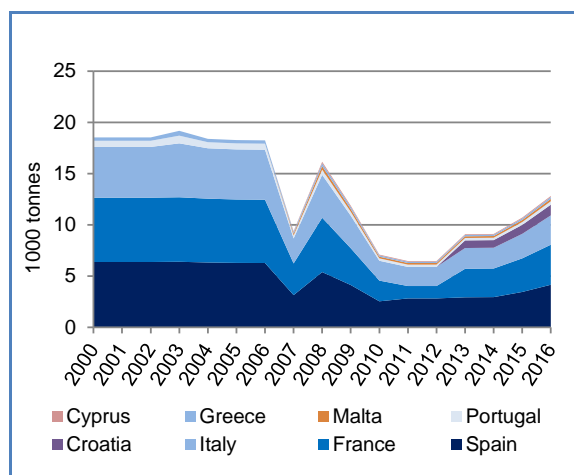
Trade / Norway: In May 2016, Norwegian seafood exports reached NOK 6,7 billion (EUR 720 million), an increase of 28% over May 2015. Of these, salmon exports were worth NOK 4,9 billion (EUR 526,6 million). At 6,5 EUR/kg salmon's export price was 58% higher in May 2016 than a year before. Poland and France were the biggest buyers of Norwegian salmon.²⁴

3. Case study: Atlantic bluefin tuna market in the EU

Atlantic bluefin tuna fisheries in the EU

For most of the EU fleet catching Atlantic bluefin tuna, the fishing season runs from 26 May to 24 June, and so the 2016 campaign was recently completed. The EU quota for 2016 increased nearly 20% over 2015, with 12.813 tonnes, shared by eight Member States. The three largest fishing countries are Spain (2016 quota: 4.150 tonnes), France (3.900 tonnes), and Italy (2.860 tonnes), accounting for approximately 85% of the EU's total, and approximately 50% of the total Atlantic bluefin quota, when including the non-EU fishing nations.

Figure 17. HISTORICAL DEVELOPMENT OF EU QUOTAS FOR ATLANTIC BLUEFIN TUNA



Source: EUMOFA.

EU fisheries of Atlantic bluefin tuna take place in both the Mediterranean and the eastern Atlantic, where the total quota is shared with non-EU nations such as Morocco, Tunisia, and Japan. In addition, there is a western Atlantic regulatory area for bluefin tuna, where the USA, Canada, Japan, and Mexico are the major catch nations.

Mediterranean and east Atlantic bluefin tuna quotas are being fished by various types of vessels, where purse-seiners represent by far the largest share, with more than 60%. Longliners represent between 10% and 15%. Traditional coastal fisheries using traps made of set-nets between smaller open boats, along the coast of Spain, Portugal, and Italy, still account for 15–20% of the total catches. In Spain, where the fishery represents approximately 50% of total catches, the method is known as *almadraba*. In Portugal, virtually all catch is based on this method, whereas *almadraba* is only used for 10% of the Italian quota. In addition, a large part of the Moroccan catch is based on *almadraba* fishery.²⁵

The high market value for bluefin tuna has led to intensified fishing pressure that, in turn, resulted in drastic population reduction in every ocean where these fish are found. Recent positive stock assessments allow an increase in Atlantic bluefin tuna quotas and catches. The EU is also implementing the state-of-the-art electronic bluefin catch document (eBCD) system, which greatly improves the traceability of all bluefin tuna products.

3.1. The EU market

Despite the 20% increase in quotas, most Atlantic bluefin tuna are fished only during a few weeks in May and June. Over the past few years, several reports suggest that an increasing number of Atlantic bluefin tuna is being marketed and consumed in local markets, especially from the *almadraba* catches. Although it is not easy to convey statistics directly related to Atlantic bluefin tuna consumption, the trends from certain marketplaces during the 2016 season confirm increasing local consumption. In Spain, sales of fresh Atlantic bluefin tuna through the auctions in Andalusia increased almost ten times during May and June, from 20 tonnes last year, to more than 180 tonnes this year, with the average price of the period falling 20% from EUR 9,90 to EUR 7,95/kg.²⁶

From mid-May through June 2016, Mercabarna, the wholesale market in Barcelona, doubled the sales of fresh tuna originating in the coastal regions of Mediterranean Spain, compared to 2015, to a volume of approximately 75 tonnes. This was five times higher than during the 2014 season.²⁷

In France, prices for fresh Atlantic bluefin tuna, sold through the auctions of Le Grau de Roi and Port La Nouvelle, registered a decline. For fresh volumes, which increased three times for both auctions combined, the price declined 10%, from EUR 14,42/kg in 2015 to EUR 12,91/kg in the current season.²⁸

As a result of pressure from non-governmental organisations, a substantial number of large-scale retailers and restaurants in several EU Member States have delisted Atlantic bluefin tuna. However, Atlantic bluefin tuna can be found in several retailers, commonly as steaks, and in restaurants presented raw, in carpaccio, sushi, or sashimi.

3.2. EU trade of Atlantic bluefin tuna

The EU is by far a net exporter of Atlantic bluefin tuna. Extra-EU export value has increased from less than EUR 100 million in 2010 and 2011, to EUR 150 million in 2015. More than 10.000 tonnes of Atlantic bluefin tuna were exported in both 2014 and 2015.

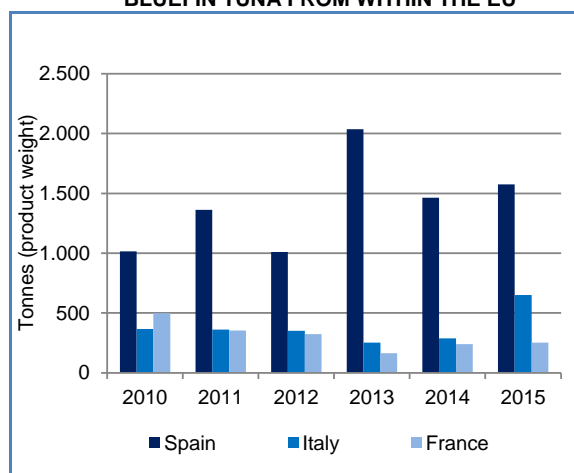
Table 3. **EXTRA-EU TRADE OF ATLANTIC BLUEFIN TUNA - EXCLUDING LIVE FISH** (value in thousand euro and volume in tonnes product weight)

		2010	2011	2012	2013	2014	2015
Export	Value	96.229	98.149	109.994	130.802	146.357	148.680
	Volume	7.974	5.144	5.547	7.781	10.125	10.428
Import	Value	2.751	786	1.880	1.114	936	1.034
	Volume	371	120	393,00	188,00	139	159

Source: EUMOFA.

Intra-EU trade in bluefin tuna is heavily influenced by the trade of live fish, which is used by the fattening industry to grow both larger and better quality individuals, according to markets with the most rigorous requirements and greatest willingness to pay. In both 2014 and 2015, the trade of live tuna represented more than 50% of intra-EU imports, corresponding to an annual volume of more than 3.000 tonnes. The major trade flows for live tuna within the EU are going to Malta and Spain. Italy and France are the main suppliers to Malta, whereas France and Portugal dominate the supply to Spain.

Looking at the trade of fresh and frozen bluefin tuna (i.e. excluding live fish), Spain, Italy, and France represent the three largest import nations for intra-EU trade, with approximately 1.600, 650, and 250 tonnes in 2015, respectively. Spain's dominant role as an importer of bluefin tuna among EU Member States is becoming even more evident, considering that, over the past five years, Spain has been the destination for more than 90% of the fresh and frozen imports coming from outside the EU. These imports are predominantly fresh whole tuna, originating in Morocco.

Figure 18. **MAIN EU IMPORTERS OF ATLANTIC BLUEFIN TUNA FROM WITHIN THE EU**

Source: EUMOFA.

Fresh tuna dominates imports in France, Italy and Spain. Between 2010 and 2015, the share of fresh products to both Spain and France has been stable, close to 90% of the total. Italy has a higher share of frozen, averaging 30% over the past six years.

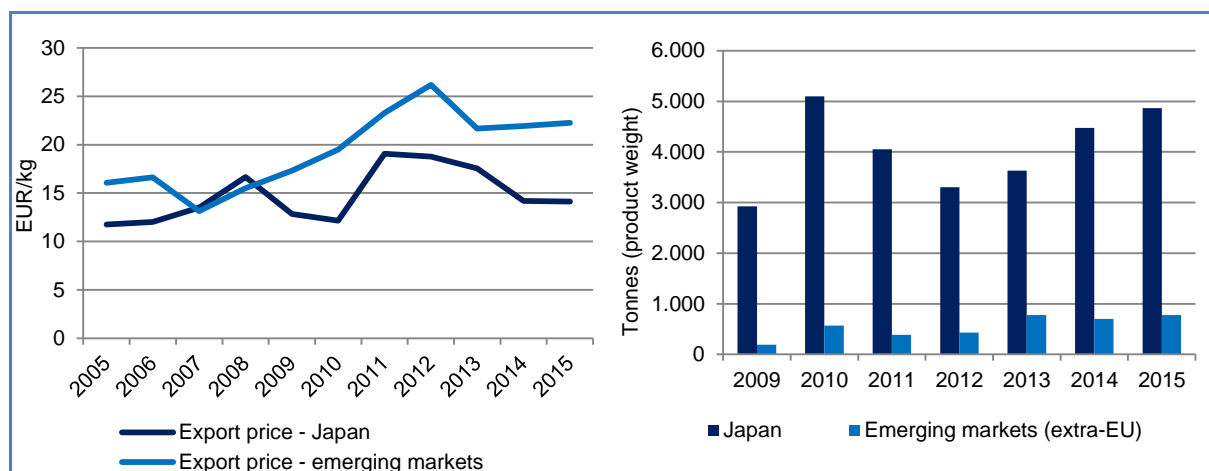
The EU does not import a substantial amount of Atlantic bluefin tuna from outside the EU. In 2015, the total import was 160 tonnes at a value of EUR 1 million. Morocco has been, and still is, the main extra-EU supplier of bluefin tuna to the EU.

The major extra-EU exporters of Atlantic bluefin tuna are Spain, Malta, and Croatia, which account for more than 95% of total volume exported from the EU in 2015. The Japanese market far exceeds any other country in export volume from the EU, accounting for almost 90% of total exports in 2015.

Japanese consumption of bluefin tuna is dominant on a global scale. In value, Atlantic bluefin tuna's share of total bluefin import has ranged between 40–60% over the past 15 years, reaching 43% in 2015. Malta is the third-largest supplier of Atlantic bluefin tuna to Japan, exhibiting a substantial increase over 2000–2015, with an average annual growth of 25%. The fourth largest supplier is Spain, which has maintained a stable supply to Japan for the past 15 years. Imports from Croatia peaked in 2006, and have since declined gradually, becoming in 2015 the sixth largest supplier of Atlantic bluefin tuna.

Although less significant than Japan, other countries such as the United States and South Korea have increased in importance as export markets in the past five years, thus gradually decreasing the EU's dependence on the Japanese market. The increase in export value on these markets is the result of both volume and price growth. It is especially interesting to compare the unit value of exports to Japan's at 13,51 EUR/kg, with that of exports to other emerging markets at 20,18 EUR/kg. The emerging markets might indicate a further globalisation of the Japanese culinary style (e.g. sushi and sashimi) and the fact that, although growth potential for bluefin is present in many markets, it is limited for Japan.

Figure 19. EU EXPORTS OF BLUEFIN TUNA TO JAPAN AND EMERGING MARKETS (EUR/kg and tonnes)

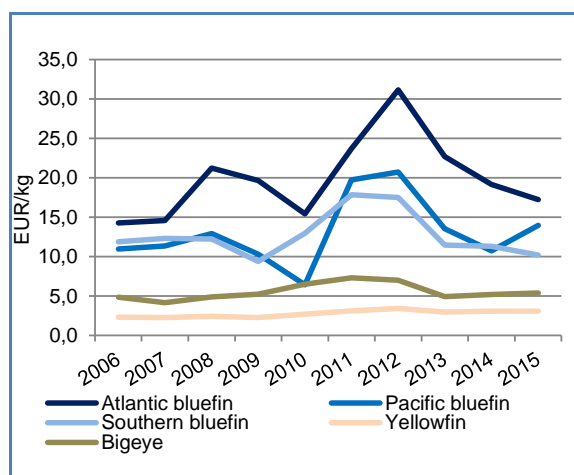


Source: EUMOFA (updated 13.06.2016).

BLUEFIN TUNA IN A GLOBAL CONTEXT

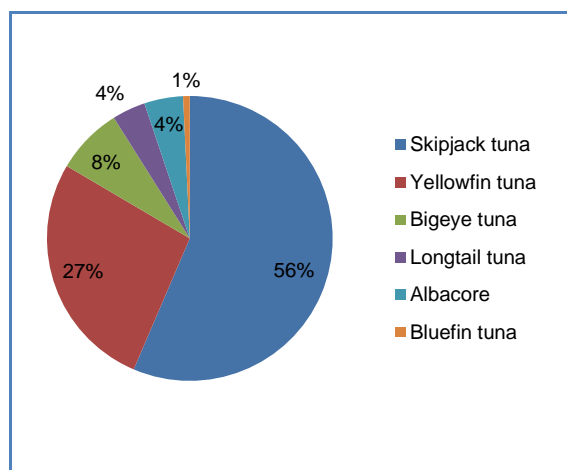
There are three main species of bluefin tuna: Atlantic bluefin tuna (*Thunnus thynnus*), Pacific bluefin tuna (*Thunnus orientalis*), and Southern bluefin tuna (*Thunnus maccoyii*). Together, they represent only 1% of global tuna catches, but are the most valuable tuna species in the world. Although prices have been trending downwards over the past 3–4 years, Atlantic bluefin tuna is still the most valued of the species, achieving premium prices among the bluefin tunas. Total tuna volume in 2014 was 7,5 million tonnes. However, most of this catch consists of low-value species, mainly skipjack sold to the canning industry.

Figure 20. JAPANESE IMPORT PRICES FOR DIFFERENT BLUEFIN TUNA SPECIES



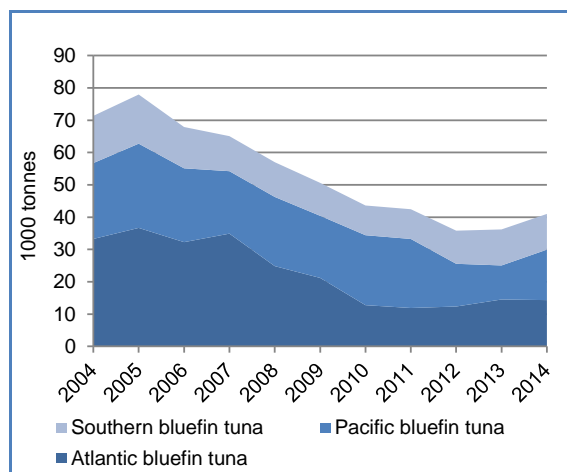
Source: Japanese national imports statistics.

Figure 21. GLOBAL CATCHES OF TUNA AND TUNA-LIKE SPECIES (2014)



Source: FAO.

Figure 22. GLOBAL CATCHES OF BLUEFIN TUNA SPECIES



Source: FAO.

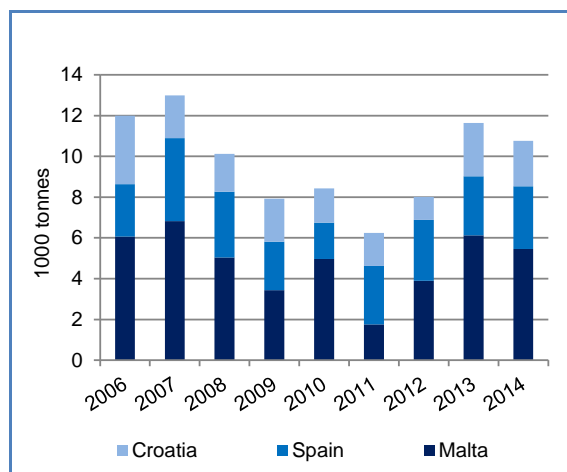
3.3. Fattening and farming

The high market value of bluefin tuna, combined with stagnation in the yield of the wild fisheries and issues with the stocks, have increased interest in aquaculture. The practice in most instances occurs at the intersection between the aquaculture and fishery sectors, which makes it difficult to consider them independently of each other. Most tuna aquaculture production, fattening, relies on the capture of wild-caught specimens for the purpose of increasing fat content.

The global aquaculture production of bluefin tuna is estimated to be approximately 36.400 tonnes. Pacific bluefin tuna is cultured in Japan and Mexico, Atlantic bluefin tuna in Mediterranean countries, and Southern bluefin tuna in Australia. The EU Member States practicing aquaculture of Atlantic bluefin tuna in the greatest volume are Malta, Spain, and Croatia, with production of 5.000, 3.000, and 2.000 tonnes, respectively. From 2006 to 2014, the aquaculture volume had an annual average increase of 2% in Malta, whereas Spain saw a 1% decline. The low growth rates were closely tied to quotas. The fattening period for Atlantic bluefin tuna in Mediterranean countries usually lasts 3–7 months, and wild-caught specimens typically range in weight from 40 to 400 kg. The main exception is Croatia, where farming can last for up to two years. It can be assumed that the reason for the two-year fattening period is to achieve maximum size and thereby exploit the quota to the fullest.

The more recent practice of growing hatchery-reared juveniles, referred to as farming, has increased in recent years. Pacific bluefin tuna farming has been driven by Japan, which first closed the life cycle in 2002. There has also been an intensive effort in closing the life cycle of Atlantic bluefin tuna in Europe, but this has not yet been achieved. However, great progress has been made in Spain, Cyprus, and Turkey.

Figure 23. **GLOBAL AQUACULTURE PRODUCTION OF ATLANTIC BLUEFIN TUNA BY MAIN COUNTRIES**



Source: EUMOFA. Croatia's 2006–2012 figures are based on FAO.

4. Consumption

FRESH EUROPEAN FLOUNDER

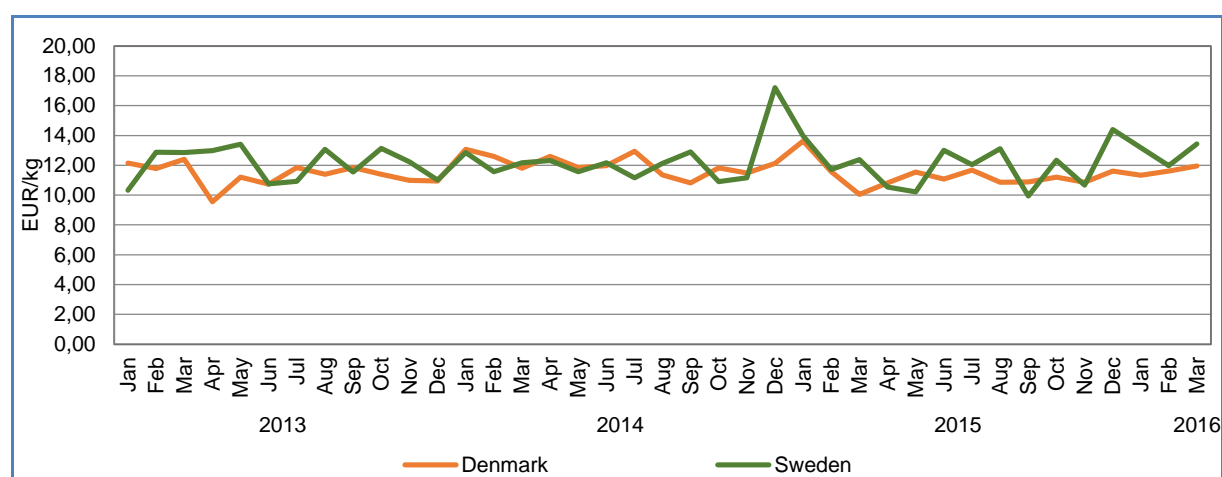


European flounder is a flatfish species, widespread in European coastal waters. It is the most widely distributed among flatfish species in the Baltic Sea. The species is greatly consumed in northern Europe. On the market, European flounder is sold fresh and frozen. It is usually prepared steamed, fried, or baked.²⁹

In **Denmark**, the retail price of fresh European flounder varied considerably, averaging 11,57 EUR/kg during January 2013–March 2016. In January of each of the past three years, the price peaked above its usual average level but, a month later, quickly returned to normal. In January 2015, it reached 13,62 EUR/kg, the highest for the period surveyed. In January–March 2016, the price averaged 11,67 EUR/kg, slightly lower (–1%) than the same period a year ago, and 7% and 4% lower than 2014 and 2013.

In **Sweden**, the retail price of fresh European flounder is the highest among the Member States surveyed, and exhibited a slight decreasing trend during January 2013–March 2016. Overall, prices experienced large variations, averaging 12,21 EUR/kg. In December 2014 and 2015, prices peaked, reaching 17,21 EUR/kg in 2015, the highest for the period. In January–March 2016, it averaged 12,86 EUR/kg, 1% higher than the same period of 2015.

Figure 24. RETAIL PRICES OF FRESH EUROPEAN FLOUNDER (EUR/KG)



Source: EUMOFA (updated 13.06.2016).

FRESH MUSSEL



Mussel is a shellfish rich in protein that can be found in many EU markets. Mussel is a popular dish in Europe, especially in France, Belgium, the Netherlands, Spain, Italy and the UK. Mussels are consumed cooked but can also be eaten raw.³⁰

In **Belgium**, the retail price of fresh mussel varied considerably, demonstrating a decreasing trend during the period surveyed (January 2013 – December 2015). Prices fluctuated between 5,06 EUR/kg and 6,53 EUR/kg, averaging 5,83 EUR/kg. In 2015, the average retail price was 5,21 EUR/kg, 11% lower compared with 2014.

In **Denmark**, the retail price of blue mussel fluctuated significantly at an average 2,82 EUR/kg during January 2013–March 2016. In December, in both 2013 and 2014, the price peaked at 3,57 EUR/kg, the highest for the

period surveyed. In November 2015, however, the price dropped to 2,05 EUR/kg, reaching the lowest value for the period.

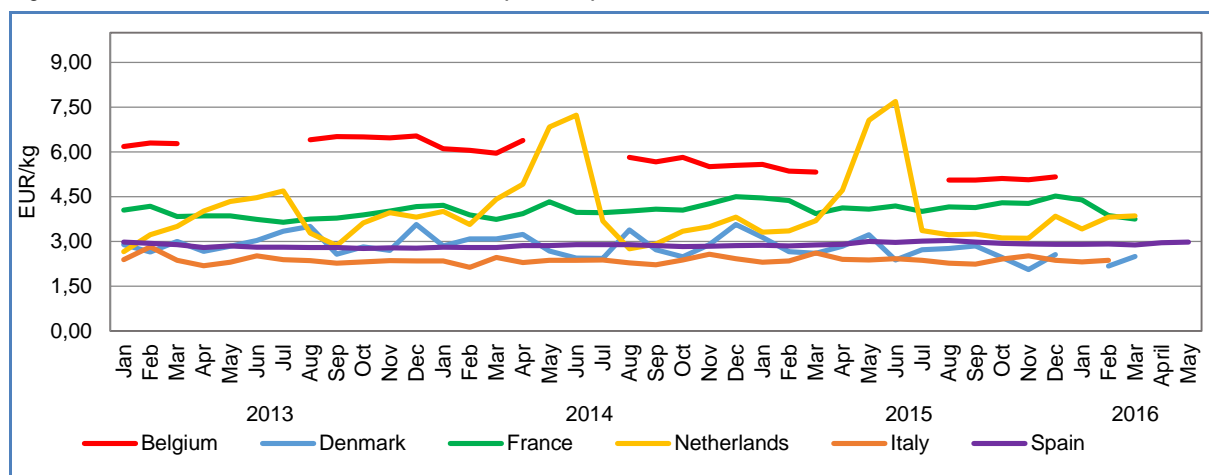
In **France**, the retail price of mussel averaged 4,06 EUR/kg and followed a three-year increasing trend. In 2015, the average price reached 4,21 EUR/kg, 3% and 8% higher than 2014 and 2013, respectively. By contrast, in January–April 2016, the average price was 4% lower than the same period in 2015.

In **Italy**, the retail price of fresh mussel remained relatively stable, with an average 2,37 EUR/kg during January 2013–February 2016. In March and November of each of the past two years, an increasing trend is observed. In March 2015, the price reached its highest value for the period surveyed (2,61 EUR/kg) and increased 6% over the previous year. Since the beginning of 2016, the price has averaged 2,34 EUR/kg.

In the **Netherlands**, seasonal variations in the retail price are observed, as prices increase between March and June, at the end of the season, and decline from July, when the season really starts (the mussel season runs from July to mid-April). The average retail price was 4,00 EUR/kg, with the highest peaks in June 2014 and 2015, when it reached 7,23 EUR/kg and 7,69 EUR/kg, respectively. In January–March 2016, the average price (3,70 EUR/kg) increased 7% compared to the same period in 2015.

In **Spain**, the average retail price of mussel (2,88 EUR/kg) displayed a slight increasing trend during January 2013–May 2016. In 2015, the price increased 3% and 4% over 2014 and 2013, respectively. In January–May 2016, the average price remained relatively constant (1%) compared with the same period the year before.

Figure 25. RETAIL PRICES OF FRESH MUSSEL (EUR/KG)



Source: EUMOFA (updated 13.06.2016).

SPAIN

In 2015, household fish and seafood consumption in Spain was 1,15 million tonnes, worth almost 9 billion EUR, corresponding to 25,9 kg/capita (-2% from 2014). Of this, 16,0 kg is fresh, and 5,1 kg is frozen. Overall, household consumption per capita dropped 5% between 2010 and 2015. By contrast, the consumption of canned seafood, which accounts for 17,3% of the volume and 20,4% of the value of total seafood consumption increased continuously over the past six years. Most of

the canned seafood is bought in supermarkets and hypermarkets (71%), followed by discount stores (18%), traditional shops (5%) and others.

The average price paid by Spanish consumer (7,76 EUR/kg) rose 2,7% from 2014. Yearly spending per capita increased 0,8%, reaching EUR 201 in 2015.³¹

Out of home consumption increased in Spain in 2015, by 0,5% for fish and by 8,7% for seafood.

Table 4. YEARLY HOUSEHOLD CONSUMPTION DEVELOPMENT IN SPAIN (KG/CAPITA)

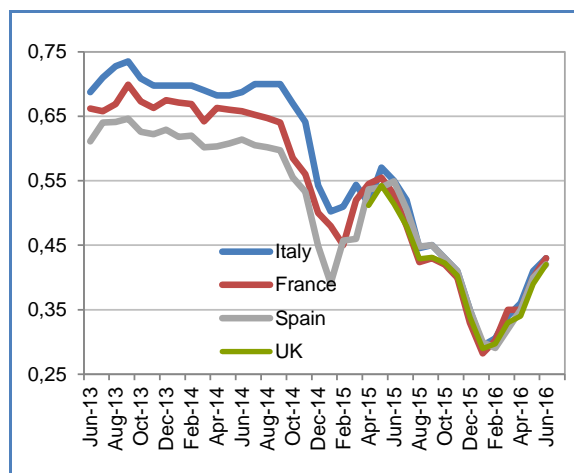
Product group	2010	2011	2012	2013	2014	2015	% change from 2010	% change from 2014
Fish and seafood - fresh	12,1	11,9	11,8	12,2	11,8	11,6	-4%	-2%
Fish and seafood - frozen	3,3	3,3	3,1	3,1	3,0	2,8	-15%	-7%
Shellfish - fresh	4,5	4,2	4,3	4,4	4,2	4,0	-11%	-5%
Shellfish - frozen	2,6	2,6	2,5	2,5	2,4	2,3	-12%	-4%
Shellfish - cooked	0,7	0,6	0,7	0,7	0,6	0,6	-14%	0%
Canned seafood (fish and shellfish)	4,1	4,2	4,1	4,3	4,4	4,5	10%	2%
Total	27,3	26,8	26,4	27,2	26,4	25,9	-5%	-2%

Source: ANFACO-CECOPESCA; MAGRAMA.

5. Macroeconomic context

5.1. MARINE FUEL

Figure 26. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN AND THE UK (EUR/LITRE)**



Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; Spain; ARVI (January 2013 – March 2015); MABUX (April 2015–June 2016).

In June 2016, the fuel price in the French ports of Lorient and Boulogne was 0,43 EUR/litre, 7% higher than in May 2016, and 19% lower than June 2015.

In the Italian ports of Ancona and Livorno, the average price of marine fuel in June 2016 was 0,43 EUR/litre. It increased 5% from the previous month and was 22% less than June 2015.

The price of marine fuel in the ports of A Coruña and Vigo, Spain, reached on average 0,42 EUR/litre in June 2016. It increased 5% from May 2016 and was 24% less compared with June 2015.

The fuel price observed in the UK ports of Grimsby and Aberdeen was 0,42 EUR/litre and increased 8% from the previous month. Compared with the same month a year ago, the fuel price decreased 18%.

5.2. FOOD AND FISH PRICES

Annual EU inflation was -0,1% in May 2016, up from -0,2% in April. In May 2016, the lowest negative annual rates were registered in Romania (-3,0%), Bulgaria (-2,5%) and Cyprus (-1,9%), while the highest annual rates were observed in Belgium (+1,6%), Malta (+1,0%) and Sweden (+0,8%).

Compared with April 2016, annual inflation fell in 9 Member States, remained stable in 8, and rose in 11.

In May 2016, prices of food and non-alcoholic beverages increased slightly (+0,2%), while prices of fish and seafood remained stable, compared with the previous month (April 2016).

Since May 2014, food prices remained stable and fish prices increased 4%.

Table 4. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)**

HICP	May 2014	May 2015	Apr 2016	May 2016 ³²
Food and non-alcoholic beverages	100,15	100,63	100,40	100,55
Fish and seafood	98,37	99,33	101,98	101,93

Source: Eurostat.

5.3. EXCHANGE RATES

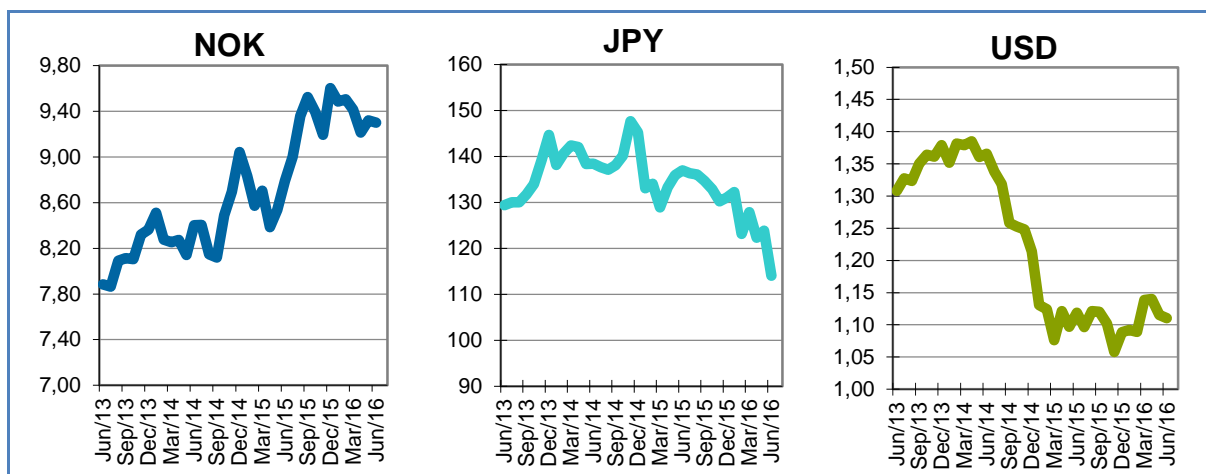
In June 2016, the euro depreciated against the Norwegian krone (-0,2%) and the US dollar (-0,5%) from May 2016. It also considerably depreciated against the Japanese yen (-7,9%). For the past six months, the euro has fluctuated around 9,37 against the Norwegian krone. Compared with a year earlier (June 2015), the euro has depreciated -0,8% and -16,8% against the US dollar and Japanese yen, respectively, and appreciated 5,8% against the Norwegian krone.

Table 5. **THE EURO EXCHANGE RATES AGAINST THREE SELECTED CURRENCIES**

Currency	June 2014	June 2015	May 2016	June 2016
NOK	8,4035	8,7910	9,3200	9,3008
JPY	138,44	137,01	123,83	114,05
USD	1,3658	1,1189	1,1154	1,1102

Source: European Central Bank.

Figure 27. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

5.4. EUROPEAN UNION ECONOMIC OVERVIEW

In January–March 2016, the EU GDP increased at a quarterly growth rate of 0,5%. Compared with the previous quarter October–December 2015, it remained stable. A decline of 0,2% in the EU annual GDP growth rate was observed.

In the EU Member States, the GDP growth increased in Romania and Cyprus with a rate of 1,6 and 0,9%,

respectively, in the first quarter of 2016. It accelerated 0,5% for both countries. In Spain, Lithuania, Austria and Slovakia, the GDP growth rate was 0,8%. Compared with the fourth quarter in 2015, it remained stable in Spain, it increased 0,3% and 0,6% in Lithuania and Austria, respectively, and it decreased 0,2% in Slovakia. The lowest annual GDP growth rate of the EU in January–March 2016 was registered in Greece and Hungary –1,4% and 0,4%, respectively.³³

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

First sales: EUMOFA. Data analysed refers to the month of April 2016. Puertos del estado, Vigo Port Authority, Spain. Danish Agrifish Agency.

Global supply: European Commission, Directorate-General for Maritime Affairs and Fisheries (DG MARE); FAO; Statistics Iceland; National Oceanic and Atmospheric Administration (NOAA); Marine Stewardship Council (MSC); Friend of the Sea (FOS); The Scottish Government; ANFACO-CECOPESCA.

Case study: EUMOFA; FAO; Junta de Andalucía/Idapes; Japanese statistics; European Parliament; Mercabana; FranceAgriMer.

Consumption: EUMOFA; FAO; DG MARE; MAGRAMA; ANFACO-CECOPESCA.

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.

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 ;
<http://www.apvigo.com/ficheros/descargas/3871.abril.pdf>

³ EUROFISH Magazine no 1/2015.

⁴ EUROFISH Magazine no 4/2002.

⁵ <http://www.fishbase.org/Summary/SpeciesSummary.php?ID=525&AT=sole>

⁶ https://stecf.jrc.ec.europa.eu/documents/43805/1034590/2015-07_STECF+15-07+-+AER+2015_JRCxxx.pdf

⁷

http://www.statistics.gr/en/statistics?p_p_id=documents_WAR_publicationsportlet_INSTANCE_qDQ8fBKKo4IN&p_p_lifecycle=2&p_p_state=normal&p_p_mode=view&p_p_cacheability=cacheLevelPage&p_p_col_id=column-2&p_p_col_count=4&p_p_col_pos=1&documents_WAR_publicationsportlet_INSTANCE_qDQ8fBKKo4IN_javax.faces.resource=document&documents_WAR_publicationsportlet_INSTANCE_qDQ8fBKKo4IN_in=downloadResources&documents_WAR_publicationsportlet_INSTANCE_qDQ8fBKKo4IN_documentID=154869&documents_WAR_publicationsportlet_INSTANCE_qDQ8fBKKo4IN_locale=en

⁸ <http://www.fao.org/fishery/species/2106/en>

⁹ <http://www.fao.org/fishery/species/2238/en>

¹⁰ <http://www.fao.org/3/a-i5703e.pdf>

¹¹ http://ec.europa.eu/information_society/newsroom/cf/mare/itemlongdetail.cfm?subweb=343&lang=en&item_id=32668

¹² http://ec.europa.eu/newsroom/mare/itemlongdetail.cfm?item_id=32438&lang=en

¹³ http://ec.europa.eu/information_society/newsroom/cf/mare/itemlongdetail.cfm?subweb=343&lang=en&item_id=32695

¹⁴ <http://www.lemarin.fr/secteurs-activites/peche/25522-golfe-de-gascogne-le-quota-danchois-2016-grimpe-de-32>

¹⁵ http://ec.europa.eu/information_society/newsroom/cf/mare/itemlongdetail.cfm?item_id=31908&subweb=343&lang=en

¹⁶ <http://www.statice.is/publications/news-archive/fisheries/fish-catches-in-may-2016/>

¹⁷ <http://www.friendofthesea.org/IT/news-doc.asp?CAT=1&ID=953&page=>

¹⁸ <https://www.msc.org/newsroom/news/north-atlantic-albacore-artisanal-fishery-now-msc-certified?fromsearch=1&isnewssearch=1>

¹⁹ <http://www.friendofthesea.org/news-doc.asp?CAT=1&ID=955&page=>

²⁰ <http://www.gov.scot/Resource/0050/00500535.pdf>

²¹ http://ec.europa.eu/fisheries/documentation/publications/pcp_en.pdf

²² http://ec.europa.eu/fisheries/documentation/publications/2016-small-scale-coastal-fleet_en.pdf?lang=en

²³ <http://www.anfaco.es/es/categorias.php?var1=News&var2=News&var3=&nar1=0&nar2=718&nar3=1275&vez=2&pagina=1>

²⁴ <http://en.seafood.no/News-and-media/News-archive/Press-releases/Norwegian-seafood-exports-worth-NOK-6.7-billion-in-May>

²⁵ The future of the Almadrabas Sector – Traditional Tuna fishing methods in the EU.

[http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540367/IPOL_STU\(2015\)540367_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540367/IPOL_STU(2015)540367_EN.pdf)

²⁶ Junta de Andalucía/Idapes.

²⁷ Mercabarna.

²⁸ FranceAgriMer.

²⁹ <http://www.fao.org/fishery/species/2550/en>

³⁰ http://ec.europa.eu/fisheries/marine_species/farmed_fish_and_shellfish/mussels/index_en.htm

³¹ http://www.magrama.gob.es/imagenes/es/informeconsumoalimentacion2015_tcm7-422016.pdf ;

<http://www.anfaco.es/es/categorias.php?var1=Noticias&var2=Noticias&var3=&nar1=0&nar2=718&nar3=1282>

³² Estimated provisional.

³³ <http://ec.europa.eu/eurostat/documents/3217494/7471575/KS-BJ-16-006-EN-N.pdf/5d2ab5a0-d8c8-46cb-824d-098e31b3cf58>