



# EUMOPA

European Market Observatory for  
Fisheries and Aquaculture Products

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# MONTHLY HIGHLIGHTS

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In September 2016, first-sales value of Norway lobster increased in Belgium, Denmark, Norway, Portugal, and Sweden. It decreased slightly in the UK. By contrast, cod first-sales value decreased in Belgium, Latvia, Lithuania, Norway, and Sweden and increased in the UK. Both France and Portugal experienced increased first-sales price for sole and the opposite trend for monk and hake. Sardine first-sales price increased in France, but decreased in Portugal.

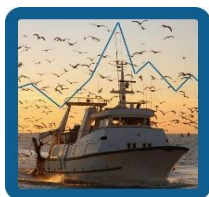
In Denmark in January–September 2016, the value of first sales reached EUR 263 million, a 15% increase over January–September 2015. Portugal's first-sales value ended at EUR 151 million, 4% higher than in January–September 2015, mainly the result of octopus and anchovy. In Sweden, the average price of all species landed was 37% higher. However, both first-sales value and volume of the top five species decreased.

An agreement has been reached between the European Union and Mauritania, which will allow six more EU trawlers targeting black hake to operate in Mauritanian waters.

A recovery plan has been adopted for the conservation of the Mediterranean swordfish. The plan introduces a total allowable catch of 10,500 tonnes of swordfish, which will be reduced gradually over time.

In the first six months of 2016, EU imports from third countries reached EUR 11,6 billion, 8% increase over the same period in 2015. Exports to third countries ended at EUR 2,2 billion. Intra EU trade increased 9% reaching almost EUR 12 billion. Cephalopods imports from third countries were worth EUR 893 million, 20% more than in the first half of 2015. At EUR 318 million, and 54,200 tonnes, octopus imports increased 10% and 5%, respectively.

Retail prices of fresh pollack for household consumption increased in Germany and decreased in the UK (January–August 2016). In Germany, prices were substantially higher than in the UK (5,19 EUR/kg), and the volume sold was remarkably lower.



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# 1. First sales in Europe

In **January–September 2016**, ten EU Member States and Norway reported first-sales data for 11 commodity groups.<sup>1</sup> First-sales value increased over the previous year (January–September 2015) for Denmark, Lithuania, Norway, Portugal, and the UK.

In **Belgium** in **January–September 2016**, first sales decreased in both volume (–4%) and value (–2%) from January–September 2015. The stability observed during the first eight months of the year ended with the sharp fall registered in **September 2016**, when first sales decreased 24% in volume and 29% in value from September 2015. With the exception of crustaceans, which experienced positive trends (+124% for shrimp *Crangon* and +11% for Norway lobster in value, over September 2015), all major species recorded dramatic value drops, especially cod (–66%), monk (–47%), ray (–41%), sole (–36%), plaice (–19%) and turbot (–20%). As in the past, the top species has been sole, whose first sales fell from 204 tonnes in September 2015 to 126 tonnes in September 2016; the drop led to a limited price rise, from 10,08 to 10,44 EUR/kg (+4%).

In **Denmark** in **January–September 2016**, first-sales value was EUR 263 million, a 15% increase over January–September 2015, and volume decreased 8%. Higher prices of herring (+27%), plaice (+16%) and shrimp *Crangon* (+163%) contributed to the value increase. In **September 2016**, the decrease in first-sales volume was due to mussel *Mytilus* (–78%) and saithe (–46%) from September 2015. Higher first-sales values of herring (+38%) and Norway lobster (+64%) contributed to the overall value increase. See more in Section 1.1.

In **January–September 2016**, **Estonia** saw decreases in both first-sales value and volume (–4% and –11%, respectively) from the same period a year before. The increase in first-sales price of all species landed (+7%), did not compensate for the overall drop in value caused by decreases in the volume of main species landed: herring (–10%) and sprat (–15%). In **September 2016**, the substantial decrease in volume from September 2015 was tied to herring (–61%) and sprat (–54%).

In **France** in **January–September 2016**, first sales experienced a modest decrease: 2% in volume and 1% in value, from January–September 2015. In **September 2016**, thanks to a strong rise in the average price (+9% over September 2015) the first-sales decrease was more limited in value (–8%) than in volume (–16%). The top three species, monk, sole, and hake, recorded significant value decreases (–5%, –10%, and –18%, respectively) and only sole, among these three, registered a price rise, from 10,59 to 11,99 EUR/kg (+13%). Among the top ten species, the largest increase was noted for sardine (+11%), while the largest decreases were observed for squid (–22%), and albacore tuna (–41%).

In **Italy** in **January–September 2016**, first sales decreased in both value (–1%) and volume (–11%) from the same period in 2015. Shrimp, hake, squillid, cuttlefish, red mullet, sole, and squid represented 62% of total first-sales value. In **September 2016** by contrast, a positive trend could be observed in volume (+19% over September 2015), but first-sales value stagnated. The

three most important species in value in September 2016 were sole, tropical shrimp and squillid, which registered large value increases (+73%, +32%, and +43%, respectively, over September 2015) despite significant price falls for two of them: from 12,98 EUR/kg in September 2015 to 8,28 EUR/kg in September 2016 for sole and from 10,65 to 10,42 EUR/kg for tropical shrimp.

**Latvia** experienced decreases in first-sales value (–15%) and volume (–2%) in **January–September 2016**, compared with January–September 2015. This was caused mainly by lower first-sales prices of sprat (–14%), herring (–13%), and smelt (–17%), as well as drops in volume of European flounder, sprat, and smelt. In **September 2016**, a greater volume of herring (+43%) contributed to the overall volume increase. A significant drop in cod first-sales price (–17%) contributed to the decrease in first-sales value from September 2015.

In **Lithuania** in **January–September 2016**, first sales increased in both value (+11%) and volume (+20%) over the same period the previous year, mainly because of a greater volume in the landings of cod (+10%). In **September 2016**, lower value (–20%) and volume (–23%) of cod contributed to the overall decrease from September 2015.

In **Norway** in **January–September 2016**, first-sales value increased 4%, to EUR 1,6 billion, whereas volume moved in the opposite direction (–9%), ending at 1,9 million tonnes, compared with January–September 2015. This was caused mainly by an increased first-sales price of cod, mackerel, and herring. In **September 2016**, a similar trend was observed, with first-sales value increasing (+8%) and volume decreasing (–6%). This was mainly owing to a higher value of Norway lobster (+58%), herring (+109%), and first-sales price of mackerel, at 1,30 EUR/kg (+49%). Lower first-sales value for cod (–6%), Greenland halibut (–45%) did not affect the overall value increase.

In **Portugal**, first sales increased in **January–September 2016** in value (+4%) and decreased in volume (–9%), compared with the same period in 2015. In **September 2016**, first sales decreased in volume (–5%) and increased considerably in value (+50%), compared with September 2015. This was mainly due to anchovy (EUR +6,4 million net increase), as well as sardine, octopus, Norway lobster, and sole. See more in Section 1.2.

In **January–September 2016**, in **Spain**, (31 ports), landings of fresh fish (162.378 tonnes) increased slightly (+1%) compared with January–September 2015, but decreased 7% from January–September 2014. In **September 2016**, 18.000 tonnes of fresh fish were landed, +2% and –15% compared with September 2015 and 2014, respectively.<sup>2</sup>

In **Sweden**, the decrease in both value and volume in **January–September 2016**, from the same period in 2015, was the result of herring, sprat, and cod. In **September 2016**, first-sales value of herring (+32%), saithe (+118%) and Norway lobster (+13%) contributed to the overall value increase over September 2015. See more in Section 1.3.

In the **UK** in **January–September 2016**, both first-sales value and volume increased 8%, over the same period in 2015, at EUR 567 million and 313.400 tonnes. Higher landings of Norway lobster and mackerel were the main

cause of the increase. In **September 2016**, the increase in first-sales value (+9%) was caused mainly by herring, with higher volume (+31%) and first-sales price (+44%).

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

Country	January–September 2014		January–September 2015		January–September 2016		Change from January–September 2015	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
<b>Belgium</b>	13.158	46,92	12.671	48,50	12.192	47,55	-4%	-2%
<b>Denmark</b>	181.619	199,13	193.409	229,64	178.662	263,35	-8%	15%
<b>Estonia</b>	39.276	10,07	38.175	8,86	34.133	8,49	-11%	-4%
<b>France</b>	155.302	454,67	146.679	484,75	143.857	482,09	-2%	-1%
<b>Italy*</b>	5.642	31,62	5.372	31,62	4.772	31,24	-11%	-1%
<b>Latvia</b>	37.512	10,58	37.024	9,17	36.280	7,83	-2%	-15%
<b>Lithuania</b>	951	0,67	1.299	0,99	1.560	1,10	20%	11%
<b>Norway</b>	2.059.961	1.390,35	2.127.510	1.560,64	1.935.845	1.622,97	-9%	4%
<b>Portugal</b>	73.866	135,91	86.591	145,40	78.590	151,08	-9%	4%
<b>Sweden</b>	117.376	67,55	131.366	74,61	84.692	65,86	-36%	-12%
<b>United Kingdom</b>	338.042	533,44	291.407	523,88	313.391	567,09	8%	8%

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

Country	September 2014		September 2015		September 2016		Change from September 2015	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
<b>Belgium</b>	2.357	6,65	1.512	5,51	1.073	4,18	-29%	-24%
<b>Denmark</b>	30.128	33,91	31.820	35,30	26.986	38,19	-15%	8%
<b>Estonia</b>	396	0,40	1.664	0,60	851	0,55	-49%	-9%
<b>France</b>	20.797	55,74	17.681	54,74	14.833	50,28	-16%	-8%
<b>Italy*</b>	527	2,41	279	1,75	331	1,76	19%	0%
<b>Latvia</b>	4.651	1,31	4.525	1,17	4.705	1,01	4%	-14%
<b>Lithuania</b>	172	0,09	148	0,12	145	0,11	-2%	-8%
<b>Norway</b>	255.749	205,42	220.783	195,59	208.601	212,09	-6%	8%
<b>Portugal</b>	10.405	15,78	14.515	15,72	13.855	23,65	-5%	50%
<b>Sweden</b>	8.028	7,68	9.369	8,63	7.763	9,00	-17%	4%
<b>United Kingdom</b>	45.261	65,61	32.853	56,06	34.859	61,19	6%	9%

Source: EUMOFA (updated 14.11.2016); volume data is reported in net weight.

\*Partial data. First-sales data for Italy covers 11 ports (10%).

## 1.1. DENMARK

Fisheries in Denmark play an important role in the country's economy, although the sector represents approximately 0,15% of the GDP. Denmark is a major exporter of fish and fisheries products as well as a large importer of raw materials used for processing and re-exportation.

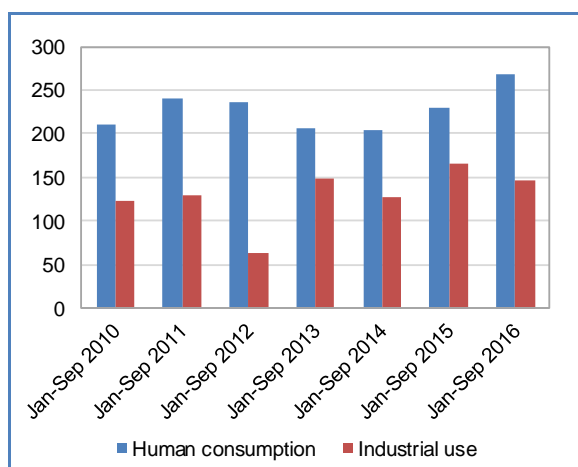
The fishing fleet is highly diversified. It comprises vessels of different sizes, uses a variety of gears and targets several species, both for human consumption and industrial use. Approximately 80% of the Danish fleet is composed of small-scale vessels using fixed gillnets. The remaining 20% uses bottom otter trawls (14%), boat dredges (3%), and other kinds of fishing gear.

The main Danish fishing ports and species in first-sales value are Hanstholm (saithe, cod, and hake), Skagen (herring and Norway lobster) and Thyborøn (plaice, cod, and sole). Thyborøn is also the main port for fish landings for industrial purposes.

The species targeted for human consumption include herring, mackerel, cod, hake, haddock, sole, plaice, and Norway lobster. Species caught for the production of fishmeal and fish oil include sandeel, sprat, Norway pout, and blue whiting.

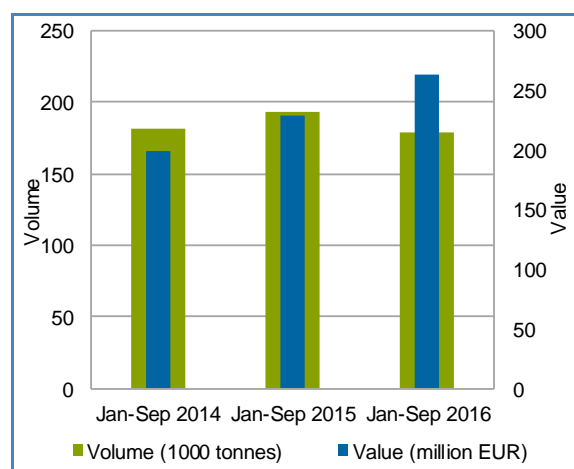
On average, landings for industrial purposes represent approximately 75% of the volume and 35% of the value of the catches landed in Denmark. In January–September 2016 at EUR 146 million, the value of landings for industrial purposes was 12% lower than the same period of the previous year; volume (521.200 tonnes) was 28% lower. This was mainly the result of a significant decrease in the sandeel quota. Sandeel represents approximately 50% of all fish volume used for production of fishmeal and fish oil. A 19% increase in the average price of fish landed for industrial purposes did not offset the value drop. In contrast, the value of fish landed for human consumption experienced an increasing trend.

Figure 1. **VALUE OF DANISH LANDINGS BY DESTINATION (million EUR)**



Source: Danish AgriFish Agency (updated 14.11.2016).

Figure 2. **JANUARY–SEPTEMBER FIRST SALES IN DENMARK**



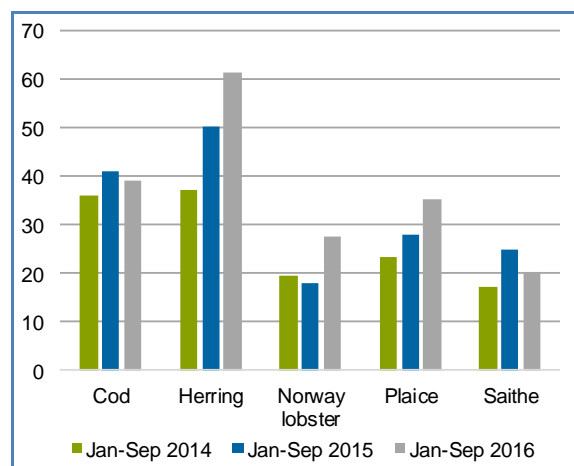
Source: EUMOFA (updated 14.11.2016).

In January–September 2016, the first sales of all reported species increased 15% in value and decreased 8% in volume compared with the same period last year. The average unit price of first sales increased 24%.

Herring (EUR 61,5 million, +22%), plaice (EUR 35,2 million, +26%), and Norway lobster (EUR 27,6 million, +55%) contributed to the value increase. Herring (87.000 tonnes, -3%), mussel *Mytilus* (19.000 tonnes, -24%), and cod (15.000 tonnes, -15%) were mainly responsible for the volume decrease.

The average unit prices increased for all main species: herring (+27%), cod (+13%), plaice (+16%), shrimp *Crangon* (+163%), and saithe (+3%) over January–September 2015.

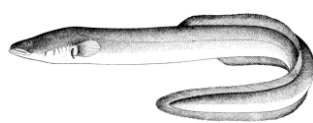
Figure 3. **JANUARY–SEPTEMBER FIRST SALES IN DENMARK BY MAIN SPECIES (million EUR)**



Source: EUMOFA (updated 14.11.2016).



## 1.1.1. EEL



European eel (*Anguilla anguilla*) is found in a range of habitats from small streams to large rivers and lakes, as well as estuaries, lagoons and coastal waters. Typically found in bodies of water that connect to the sea, it migrates to the open sea to breed. The European eel feeds on a variety of bottom-living organisms including fish and crustaceans.

It can be found in Atlantic coastal waters from Scandinavia to Morocco; in the Baltic, Black, and Mediterranean seas; in rivers running into the North Atlantic and the Baltic and Mediterranean seas.

European eel migrates at maturity to the Sargasso Sea to spawn, and it travels great distances (5.000–6.000 km) during its spawning migration. Eel spawns once in its lifetime in late winter and early spring at depths of 400–700 m.

Eel is brought to the coasts of Europe by the Gulf Stream in trips that usually take 7–11 months, and can last for up to three years. Then it transforms into glass eel: 6–8 cm long, cylindrical in shape, and transparent to slightly pigmented. It enters the estuaries and colonises the rivers and lakes. The glass eel stage is followed by a long feeding period lasting 6–12 years for males and 9–20 years for females. The average lifespan is 15–20 years.<sup>3</sup>

The Danish eel fishery takes place in bays, lagoons, fjords, and inland waters. About 95% of the catch is from marine waters. The gears used are fykenets, poundnets, trawls, seines, traps, pots, and spears.

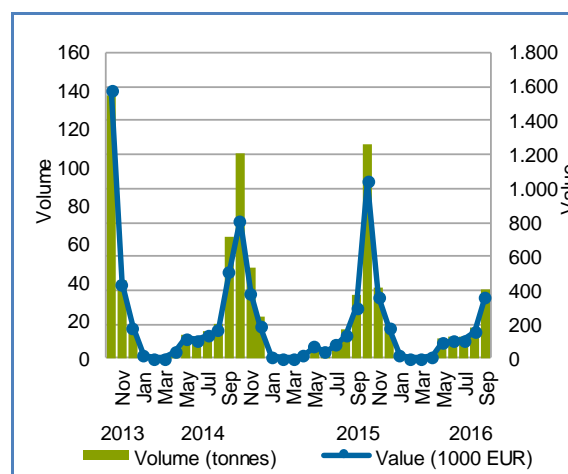
Catches fluctuate over the year and they have experienced a decreasing trend in the past years. The two main causes are predation by seals and cormorants, and the one-year-validity of the eel fishing license.

Typically fishing in Denmark takes place in autumn (September–November) with peaks in October.

On the market, the European eel is sold fresh, frozen, dried/salted, or smoked. In addition, eel is caught for stocking heavily fished areas and for aquaculture.

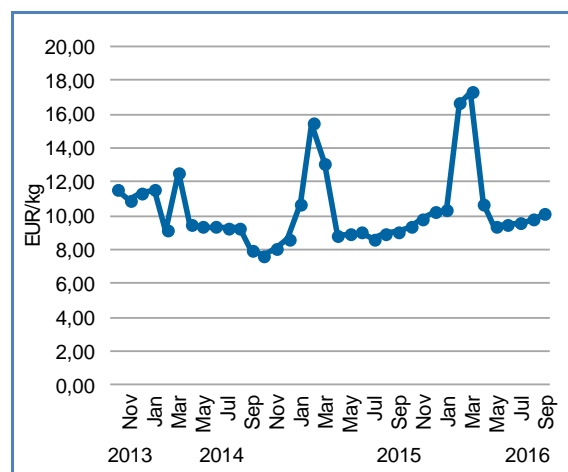
In January–September 2016, the accumulated first sales of eel at EUR 0,86 million increased 29% in value corresponding to 88 tonnes (+18%) over January–September 2015. First sales were substantially lower in both value (–22%) and volume (–31%) than January–September 2014. In September 2016, first sales increased in both value (+22%) and volume (+9%) over September 2015.

Figure 4. EUROPEAN EEL: FIRST SALES IN DENMARK



Source: EUMOFA (updated 14.11.2016).

Figure 5. EUROPEAN EEL: FIRST-SALES PRICE IN DENMARK



Source: EUMOFA (updated 14.11.2016).

With the scarcity of catches, the first-sales price exhibited an increasing trend. In January–September 2016, the average unit price was 9,84 EUR/kg, 9% and 13% higher than the same period in 2015 and 2014, respectively. The highest average price in the past three years was in March 2016, at 17,28 EUR/kg, corresponding to 0,2 tonnes.

## 1.2. PORTUGAL

Portugal has a coastline of 1.214 km and an exclusive economic zone of 1,7 million km<sup>2</sup> (including the Madeira and Azores islands). Although representing less than 1% of the country's GDP, Portuguese fisheries have a significant economic importance, especially for the small coastal communities. Portugal has the highest per capita consumption of fish and fishery products in the European Union.

Most catches (90%) are landed in continental Portugal, 6% in the Azores and 4% in Madeira. Catches in continental Portugal focus mainly on three species: sardine, mackerel, and horse mackerel. Catches in Madeira comprise mostly tuna and scabbardfish, while in the Azores, tuna and swordfish are most common.<sup>4</sup>

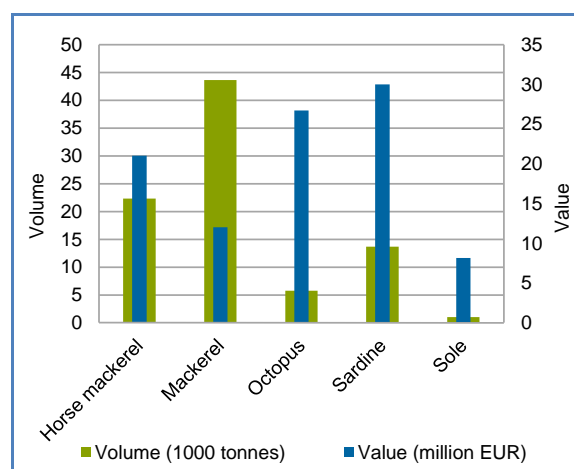
In Portugal, there are 4.188 fishing vessels which are licensed to operate; most of them are small (less than 5 Gross Tonnage). Main fishing takes place in the Northwest and Northeast Atlantic fishing zones (Norway, Svalbard, Spain, and Greenland) and the Central Atlantic fishing zones (Guinea-Bissau, Cape Verde, Senegal and Mauritania), in addition to Portuguese waters.

Quotas for main species in 2016 increased for horse mackerel (53.445 tonnes, +16%), anchovy (5.542 tonnes, +10%), swordfish (1.651 tonnes, +11%) and bluefin tuna (332 tonnes, +19%). They decreased for hake (3.188 tonnes, -23%), mackerel (6.971 tonnes, -15%), blue whiting (8.480 tonnes, -4%), cod (7.729 tonnes, -5%) and monk (426 tonnes, -14%).

In 2015, 15 producer organisations (POs) were associated with 1.696 vessels. PO landings increased 28% over 2014, as a result of larger landings of mackerel (+60%) and horse mackerel (+38%); conversely, sardine decreased 14%. POs are particularly involved in small pelagics fishing: in 2015, they provided 85%, 92% and 97%, respectively, of the total quantities of mackerel, horse mackerel and sardine landed in national ports.

The top three ports in first-sales value in January–September 2016 were Matosinhos (16%), Sesimbra and Peniche (both 15%). Matosinhos accounts mainly for anchovy (EUR 9 million) and sardine (EUR 7 million). Sesimbra accounts for scabbardfish (EUR 5,2 million) and octopus (EUR 5,3 million). Peniche accounts for sardine (EUR 6 million) and horse mackerel (EUR 3 million).

Figure 6. **FIRST SALES IN PORTUGAL BY MAIN SPECIES (2015)**



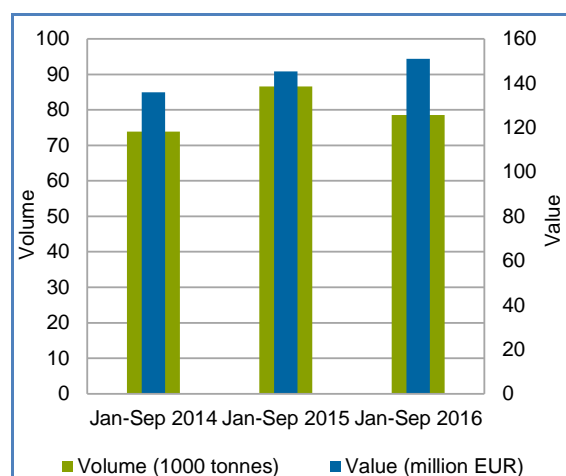
Source: EUMOFA (updated 14.11.2016).

In 2015, Portuguese vessels landed 194.164 tonnes of fish, crustaceans, and molluscs, a 6% increase over 2014. Landings increased 7% in value, ending at EUR 184,75 million. The average price of landings decreased 11%, reaching 1,81 EUR/kg. The overall decrease was registered in continental Portugal (-14%), while in the Azores and Madeira prices were 14% and 25% higher, respectively.<sup>5</sup>

In January–September 2016, first-sales value reached EUR 151 million, 4% over the corresponding period the previous year, while volume decreased 9%. The average price of all species landed increased 14%.

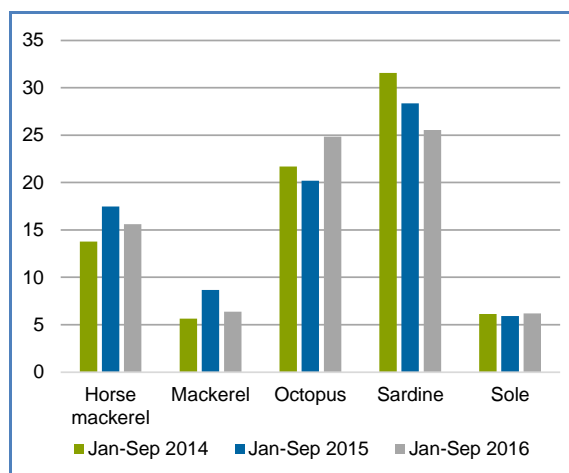
The value increase was mainly the result of octopus (EUR 24,8 million, +23%) and anchovy (EUR 11,2 million, +157%). Both species experienced decreases in average prices (-5% and -7%, respectively). However, the price drop was offset by greater volume landed (5.500 tonnes of octopus and 6.500 tonnes of anchovy).

Figure 7. **JANUARY–SEPTEMBER FIRST SALES IN PORTUGAL**



Source: EUMOFA (updated 14.11.2016).

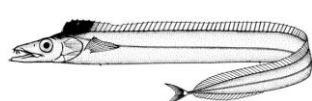
Figure 8. **JANUARY–SEPTEMBER FIRST SALES IN PORTUGAL BY MAIN SPECIES (million EUR)**



Source: EUMOFA (updated 14.11.2016).

In September 2016, first-sales value increased 50% over September 2015. This was the result of a 58% increase in the average price, which reached 1,71 EUR/kg, combined with large increases in landings for species whose price was above average. The fall in average price of the top three species – anchovy (–10%), sardine (–17%), and octopus (–8%) – did not prevent the significant increase in value. Volume fell because of mackerel (–66%).

#### 1.2.1. SCABBARDFISH



There are two species of scabbardfish, black and silver, both of which can be found

off the Portuguese coast. The species can also be found in other European seas, along the coast of northern Spain and France, and west and north of the British Isles.

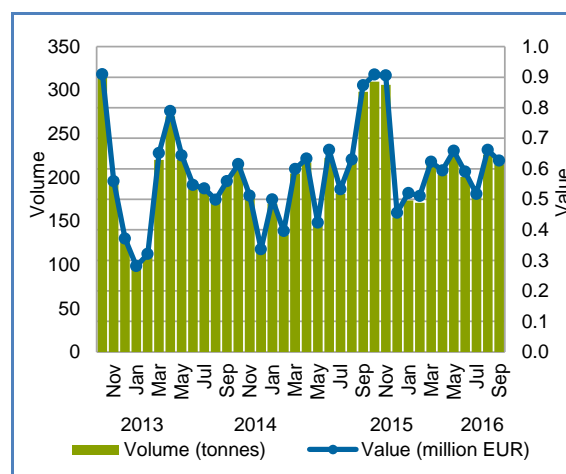
The scabbardfish is benthopelagic and can be found at great depths, down to 400 m, but normally at around 100–250 m on sandy or muddy bottoms. In general, the scabbardfish feeds on crustaceans, small squid and fish.

Both the black and the silver scabbardfish spawn in deeper water. The black scabbardfish spawns from November to April west of the British Isles.<sup>6</sup> The silver scabbardfish spawns from the end of winter to early spring off the north coast of Africa.<sup>7</sup>

Scabbardfish is caught with deep-water longlines, especially off Madeira, and in mixed fisheries with trawls. In 2015, Sesimbra was the top port for landings of scabbardfish in Portugal, accounting for almost 98% of the continental landings. In January–September 2016, Sesimbra accounted for 99% of the volume landed.

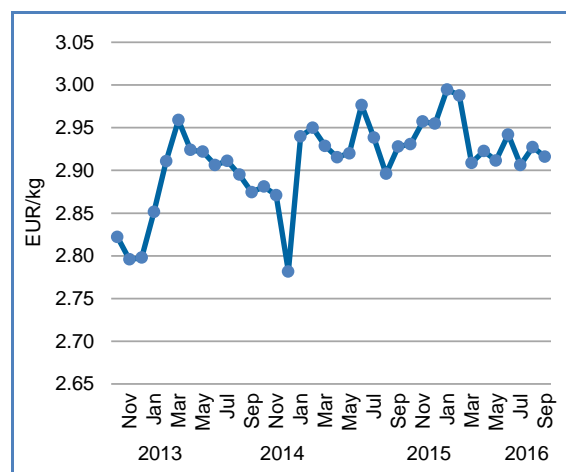
In January–September 2016, first-sales value of scabbardfish was EUR 5,3 million and 1.809 tonnes. This was a 1% increase in both value and volume over January–September 2015. Compared with January–September 2014, first-sales value and volume increased 10% and 9%, respectively.

Figure 9. **SCABBARDFISH: FIRST SALES IN PORTUGAL**



Source: EUMOFA (updated 14.11.2016).

Figure 10. **SCABBARDFISH: FIRST-SALES PRICE IN PORTUGAL**



Source: EUMOFA (updated 14.11.2016).

The average unit price of scabbardfish was relatively stable through 2015, at EUR 2,94/kg, a 1% increase over 2014. In January–September 2016, the average unit price was EUR 2,93/kg, identical with the corresponding period in 2015.

The highest average price in the past three years was in January 2016, at 2,99 EUR/kg, corresponding to 174 tonnes.

### 1.3. SWEDEN

From 2005 to 2015, the Swedish fishing fleet decreased from 1.588 to 1.328 vessels, a 2% decrease from 2014. The Swedish fleet fishes primarily in the Baltic Sea (59%); catches in the North Sea, and the Skagerrak and Kattegat account for 29% and 12%, respectively.

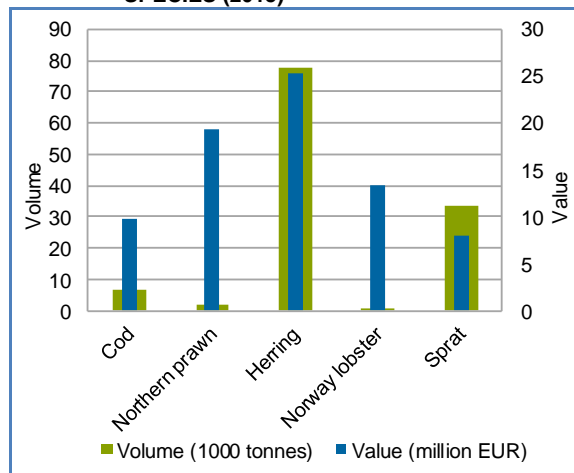
The main species caught in the Baltic Sea are herring and sprat, covering more than 90% of the volume of fish caught in the area. In the North Sea and the Skagerrak and Kattegat, the main species are sandeel (56%) and herring (71%), respectively.<sup>8</sup>

In Sweden, the ports where national and foreign vessels can land their catches are determined by species, vessel nationality, preservation, catch volume, size and area. For example, cod caught in the Baltic Sea can only be landed in three designated ports.<sup>9</sup>

Quotas for main species in 2016 increased 3% for herring (118.025 tonnes), blue whiting (7.842 tonnes, +5%). They decreased for sprat (-4%) and cod (-17%), ending at 48.349 tonnes and 12.783 tonnes, respectively.

In 2015, Swedish vessels landed approximately 150.900 tonnes of fish, crustaceans, and molluscs, a 5% increase over 2014. The landings increased 8% in value, ending at EUR 91,59 million.

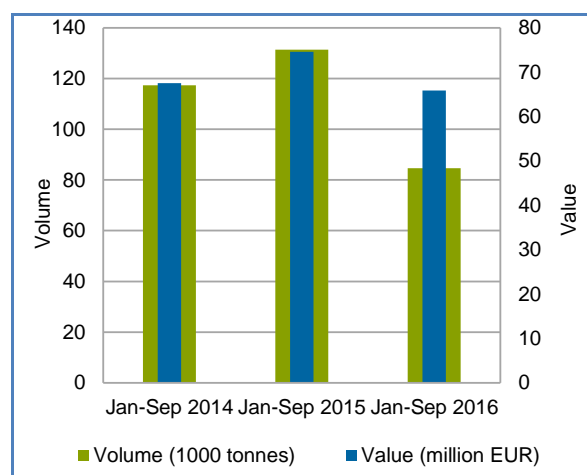
Figure 11. **FIRST SALES IN SWEDEN BY MAIN SPECIES (2015)**



Source: EUMOFA (updated 14.11.2016).

In January–September 2016, first-sales value and volume were EUR 65,86 million and approximately 85.000 tonnes. This was a decrease in both first-sales value and volume (-12% and -36%, respectively), from January–September 2015. Compared with January–September 2014, both first-sales value and volume decreased 3% and 28%, respectively. The average price of all species landed at 0,78 EUR/kg was 37% higher than January–September 2015.

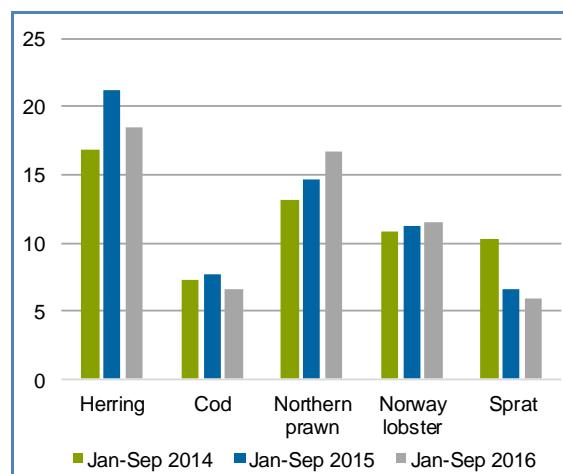
Figure 12. **JANUARY–SEPTEMBER FIRST SALES IN SWEDEN**



Source: EUMOFA (updated 14.11.2016).

In January–September 2016, the top five main commercial species landed in Sweden were sprat, herring, other coldwater shrimp (which consists mostly of northern prawn), Norway lobster, and cod. These represented 90% of the total first-sales value and 97% of the volume. Compared with January–September 2015, both first-sales value and volume of the top five main commercial species decreased 12% and 20%, respectively.

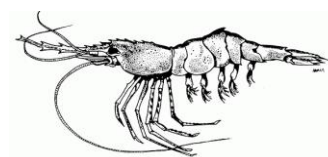
Figure 13. **JANUARY–SEPTEMBER FIRST SALES IN SWEDEN BY MAIN SPECIES (million EUR)**



Source: EUMOFA (updated 14.11.2016).



### 1.3.1. NORTHERN PRAWN



Northern prawn is commonly found in the North Sea and the Skagerrak. However, northern prawn can also be found in other areas

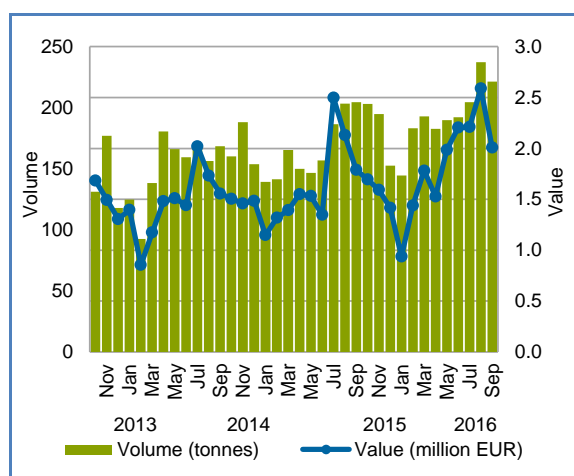
in European waters, from the coasts of Norway to the east coast of the British Isles and around Iceland.

The species is typically found at depths of 70 m or more, on muddy bottoms.<sup>10</sup> It feeds mainly on small crustaceans, but at night it rises to the upper scale of the water column to feed on phytoplankton. The spawning occurs in October–November; in March, the females migrate to shallower water with the eggs attached to their backs to complete the hatching.<sup>11</sup>

In 2016, the EU quota for northern prawn is 9.494 tonnes, with Sweden accounting for 2.527 tonnes (27%). Compared with 2015, the Swedish quota increased 53%, while in Denmark, the main EU player in the species fishing, quota decreased 12%.<sup>12</sup>

The main gear to catch northern prawn is trawl, commonly used by multi-purpose fishing vessels.<sup>13</sup>

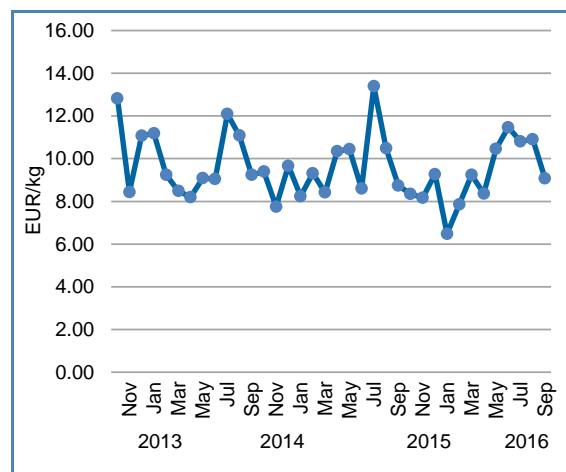
Figure 14. **NORTHERN PRAWN: FIRST SALES IN SWEDEN**



Source: EUMOFA (updated 14.11.2016).

First-sales value of northern prawn in January–September 2016 were the second highest in value (after herring), and fourth largest in volume (after herring, sprat, and cod). The accumulated first-sales value reached EUR 16,69 million, a 13% increase over the corresponding period in 2015. The volume in the same months increased 17%, at 1.748 tonnes. Compared to January–September 2014, the first-sales value and volume increased 27% and 29%, respectively.

Figure 15. **NORTHERN PRAWN: FIRST-SALES PRICE IN SWEDEN**



Source: EUMOFA (updated 14.11.2016).

The average unit price of northern prawn in 2015 was 9,48 EUR/kg (–1% from 2014); it fluctuated from 8,18 EUR/kg (November) to 13,40 EUR/kg (July) through the year. The average unit price in January–September 2016 was 9,41 EUR/kg, a 4% decrease from January–September 2015.

## 2. Global Supply

**Fishing opportunities / Northeast Atlantic / Deep-sea fish:** European Union fisheries ministers have agreed on the 2017 and 2018 Total Allowable Catches (TAC) for 19 deep-sea stocks in the EU and international waters in the Northeast Atlantic. The fish species concerned are: deep-sea sharks (unavoidable bycatch only), black scabbardfish, roundnose and roughhead grenadier, alfonsoino, red seabream, and greater forkbeard. In 2017, according to the agreement, the TAC will decrease for 14 stocks, increase for 3 and remain unchanged for 2 stocks.<sup>14</sup>

**Resources / Mediterranean / Swordfish:** A recovery plan has been adopted for the conservation of the Mediterranean swordfish. The plan will start in 2017 and will be in effect for the next 15 years. It introduces a total allowable catch (TAC) of 10.500 tonnes of swordfish, which will be reduced gradually over time. The European Union fleet is responsible for 80% of swordfish catches. Other non-EU countries involved in this fishery are Tunisia, Morocco, Algeria, Turkey, and Libya.<sup>15</sup>

**EU / Mauritania / Fisheries Partnership Agreement:** Six more trawlers of the European Union fleet will be allowed to operate in Mauritanian waters in the framework of the Partnership Agreement between the EU and Mauritania. In addition, the Parties agreed to introduce new fishing opportunities for up to six EU demersal freezer trawlers targeting black hake. In exchange, the EU will pay EUR 2,5 million on top of the EUR 55 million already included in the Protocol.<sup>16</sup>

**EU / Ecuador / Trade agreement:** The European Union has a comprehensive trade agreement with Colombia and Peru, which has been applied provisionally since 2013. Furthermore, the EU together with Ecuador, Colombia and Peru have signed the Protocol of Accession of Ecuador to the Trade Agreement with Colombia and Peru. The agreement will facilitate fisheries and aquaculture products from Ecuador to enter the European market tariff free. In the first half of 2016, EU imports from Ecuador reached EUR 525 million, 8% more than the same period in 2015. Of these, tropical shrimp and skipjack tuna were the most significant.<sup>17</sup>

**Fisheries / Argentina:** Argentine landings fell to 528.000 tonnes in the period January–September 2016, down 11% from the same period in 2015 and down 12% from the same period in 2014. Argentine shortfin squid (*Illex argentinus*), whose landings decreased from 126.100 tonnes to 57.600 tonnes, is the main reason for this fall. Argentine hake (*Merluccius hubbsi*) registered a

better result, with landings rising from 196.500 tonnes to 241.100 tonnes. Mar del Plata and Puerto Madryn were the two major ports, with 52% and 15% of total landings, respectively.<sup>18</sup>

**Fisheries / Iceland:** The total catch of Icelandic vessels was 81.480 tonnes in October 2016, 13% more than in October 2015. The increase was caused mainly by mackerel (+74%) and herring (+45%). On a year-to-year basis (November 2015–October 2016), the total catch decreased 18%, owing mostly to capelin (–71%) and blue whiting (–6%).<sup>19</sup>

**Fisheries and Aquaculture / Turkey:** Fisheries and aquaculture production rose from 537.000 tonnes in 2014 to 672.000 tonnes in 2015 (+25%). Fisheries provided 64% of this production (432.000 tonnes) and aquaculture 36% (240.000 tonnes). The production of capture fisheries increased 43% in 2015; main species are anchovy (193.500 tonnes, +101%), sprat (77.000 tonnes, +85%), striped Venus (37.400 tonnes, +71%), sardine (16.700 tonnes, –8%), horse mackerel (14.300 tonnes, +17%), and whiting (13.200 tonnes, +38%). In 2015, more than half of anchovy catches (53%) were processed into fishmeal and fish oil. Aquaculture production increased 2% in 2015; the main species farmed are rainbow trout (100.400 tonnes, –7%), sea bass (75.200 tonnes, +1%), and seabream (51.800 tonnes, +24%).<sup>20</sup>

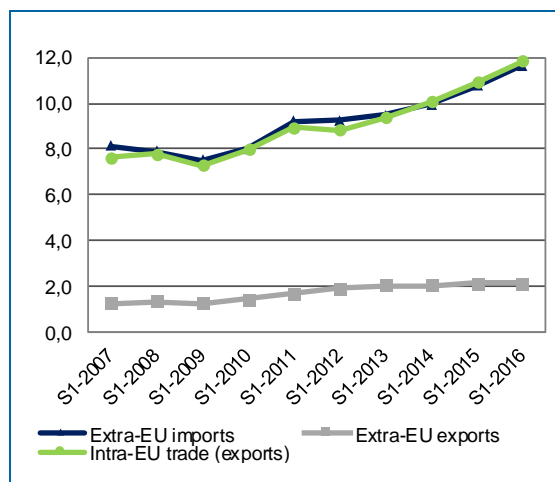
**Aquaculture / Europe:** According to the Federation of European Aquaculture Producers (FEAP) Production report 2016, EU-28 finfish production grew from 643.700 tonnes in 2014 to 674.500 tonnes in 2015 (+5%). The greatest increases have been recorded for Croatia (12.100 tonnes, +19%), the UK (201.600 tonnes, +13%), Cyprus (5.400 tonnes, +12%), Hungary (16.100 tonnes, +12%), Spain (64.200 tonnes, +8%), and France (44.600 tonnes, +8%). Main finfish species farmed in the EU are rainbow trout (199.100 tonnes, +1%), Atlantic salmon (197.800 tonnes, +14%), seabream (99.600 tonnes, –5%), seabass (81.500 tonnes, +11%), and common carp (57.600 tonnes, +1%).<sup>21</sup>

**Trade / Norway:** In October 2016, Norwegian seafood exports reached NOK 9,4 billion (EUR 1,04 billion), a 16% increase over October 2015. Of these, salmon exports were worth NOK 5,7 billion (EUR 631,2 million), 23% more than a year before. At 6,6 EUR/kg, fresh salmon's export price was 44% higher in October 2016 than a year before. Poland and France were the leading buyers of Norwegian salmon.<sup>22</sup>

### 3. EU trade in the first semester of 2016

The EU is the largest trader of fisheries and aquaculture products in the world in value. In the first semester of 2016 (S1-2016), the trade flow (extra-EU imports, intra- and extra-EU exports) amounted to EUR 25,6 billion and 6,9 million tonnes.

Figure 16. EU TRADE FLOW (billion EUR)

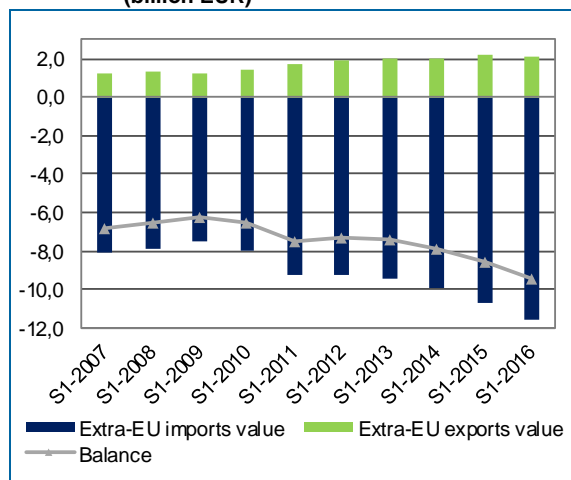


Source: EUMOFA (updated 8.11.2016).

In S1-2016, imports from third countries reached EUR 11,6 billion, 8% higher than the first semester of the previous year. This increase is the result of a rise in both the average import price at 3,85 EUR/kg (+3%) over S1-2015 and import volume (+5%).

Trade between EU Member States plays a major role. It was nearly EUR 12 billion in S1-2016, 9% higher than S1-2015. The average price of fisheries and aquaculture products increased 7%, reaching 3,91 EUR/kg, while the import volume increased marginally (+1%).

Figure 17. EXTRA-EU TRADE BALANCE (billion EUR)



Source: EUMOFA (updated 8.11.2016).

EU exports to third countries decreased slightly in value, ending close to EUR 2,2 billion (less EUR 15,2 million or -1%). In S1-2016, the average price of fishery products exported by the EU increased 10%, ending at 2,44 EUR/kg, while volume decreased 10%.

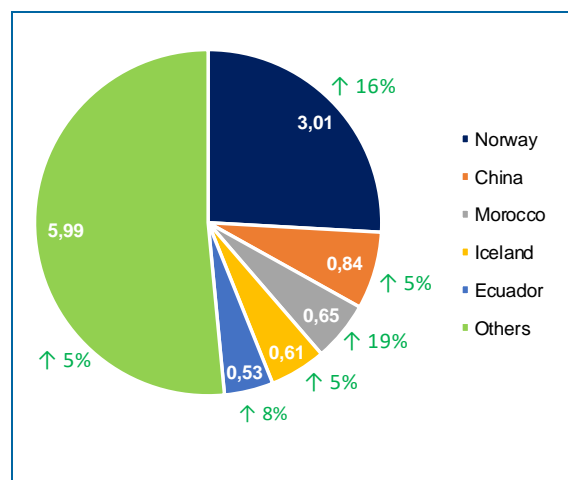
The EU trade balance deficit (exports minus imports) continued to grow, reaching EUR 9,5 billion, 10% higher than S1-2015 and 38% higher than ten years ago. This confirms that the EU is a net importer of fisheries and aquaculture products.

The development of exchange rates between the euro and foreign currencies influenced the dynamics of both extra and intra-EU trade. In January–June 2016, while the euro depreciated slightly against the US dollar, a strong euro against the Norwegian krone (+7,9% compared with the corresponding period of 2015) had a positive influence on the increase of imports. The euro also remained strong against the British pound (+7,4%) and the Chinese yuan (+5,2%).

#### 3.1. TRADE WITH THIRD COUNTRIES

EU trade partners meet the needs, of both the EU consumer market and the processing industry. Norway is the EU's main supplier. Close to 85% of extra-EU salmon imports originate from Norway. In S1-2016, these reached EUR 2,07 billion (+20%), owing to a 25% increase in price. Most of the salmon (95%) is imported fresh. China has a leading role in processing for the EU; imports from China reached EUR 0,84 billion (+5%). Frozen Alaska pollock (EUR 0,18 billion) was the leading product. Prepared/salted anchovy and sardine as well as frozen octopus and squid are the main products imported by the EU from Morocco.

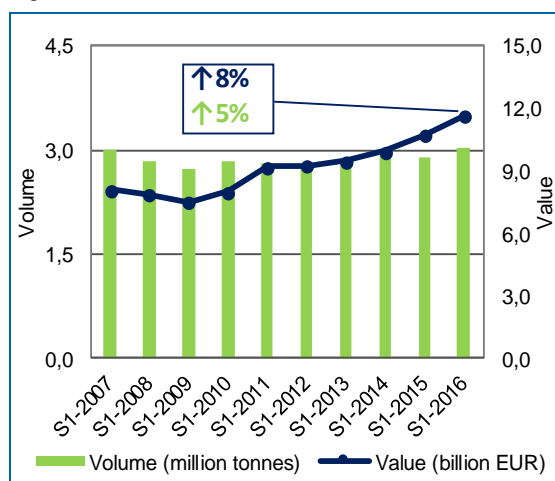
Figure 18. EXTRA-EU IMPORTS: MAIN PARTNERS (billion EUR)



Source: EUMOFA (updated 8.11.2016). Percentages represent changes from S1-2015.

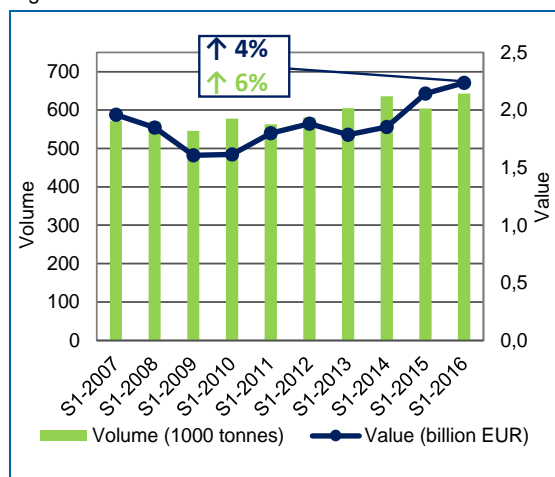
**EXTRA-EU IMPORTS:** In January–June 2016, crustaceans and groundfish (+4% each), salmonids (+21%), and tuna and tuna-like species (–3%) represented 70% of extra-EU import value. Except for the last, these were the main contributors to the overall increase in the EU's import net value. Other commodity groups contributing positively were cephalopods (+20%) and small pelagics (+21%). In S1-2016, at 3 million tonnes, extra-EU import volume was 5% higher than S1-2015; 48% were frozen products, 18% fresh and 15% prepared or preserved.

The top importing Member States were Sweden (+EUR 259 million), Denmark (+EUR 225 million), Spain (+EUR 89 million), the Netherlands (+EUR 64 million) and the UK (+EUR 47 million). Sweden and Denmark are the main entry points for Norwegian salmon (the most valuable species imported into the EU). However, most salmon entering these countries is re-exported to other Member States for processing and/or consumption.

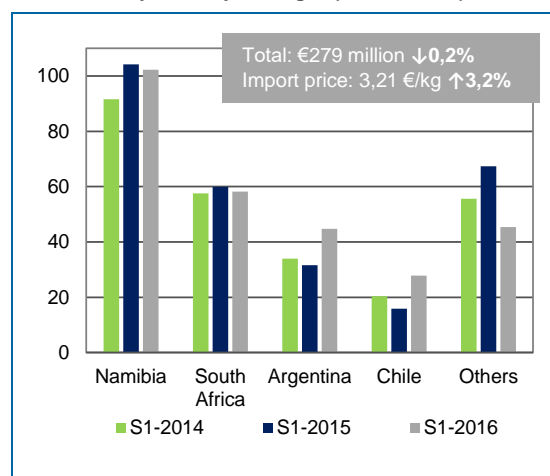
Figure 19. **EXTRA-EU IMPORTS**

Source: EUMOFA (updated 8.11.2016).

**Groundfish** has a 19% share of EU imports from third countries in value and 21% in volume. In S1-2016, its import value was EUR 2,24 billion, corresponding to a volume of 643.200 tonnes (+6%).

Figure 20. **GROUNDFISH: EXTRA-EU IMPORTS**

Source: EUMOFA (updated 8.11.2016).

Figure 21. **HAKE: EXTRA-EU IMPORTS by country of origin (million EUR)**

Source: EUMOFA (updated 8.11.2016).

Hake accounts for 12% of value and 13% of volume of total groundfish imported from extra-EU countries. A 3,2% increase in the import price in S1-2016 did not compensate for the slight decrease in value from S1-2015. Meanwhile, volume ended at 86.700 tonnes, 3% lower. Spain is by far the major EU market for hake, absorbing more than 50% (EUR 151 million, +7%) of all extra-EU imports of hake. Other relevant importers are Italy (EUR 40 million, –10%) and Portugal (EUR 22 million, +9%). Most hake is imported as frozen fillets.

Imports from Namibia decreased slightly, reaching EUR 102 million and accounting for 37% of all extra-EU hake imports. By contrast, imports from Argentina (EUR 44,7 million) and Chile (EUR 27,8 million) rose 42% and 75%, respectively.

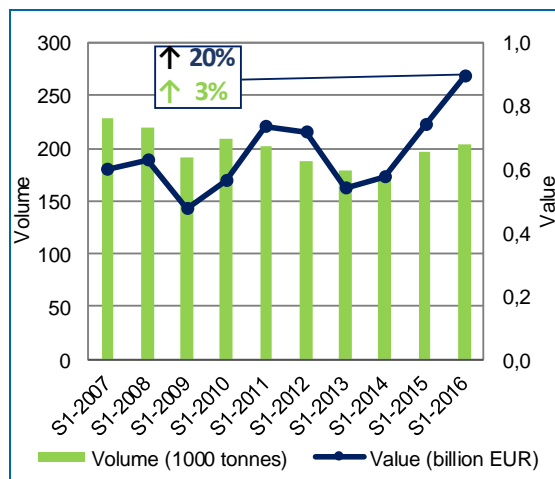
We have covered **hake** in previous *Monthly Highlights*:

First sales: Greece (7/2016, 3/2014), France (1/2016), Portugal (5/2015, May 2013), Denmark (October 2013)

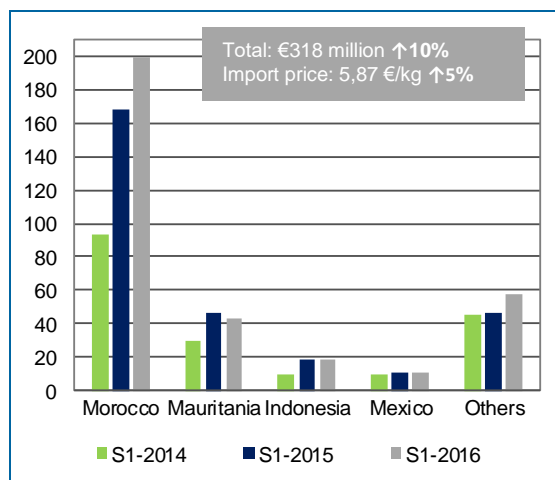
Case study: Spain (8/2015), France (2/2015)

Consumption: France and Greece (4&9 /2016, 7/2015, 6/2014), Spain (4&9 /2016, 7/2015, 6/2014, October 2013), Ireland (9/2016), Italy (4/2016, 7/2015, 6/2014), Portugal (4&9 /2016, 6/2014), Sweden and the United Kingdom (October 2013)

**Cephalopods** imports from third countries were worth EUR 0,89 billion (+20%) at 203.000 tonnes (+3%) in S1-2016. The average export price increased 17%, from 3,76 EUR/kg in S1-2015 to 4,40 EUR/kg in S1-2016.

Figure 22. **CEPHALOPODS: EXTRA-EU IMPORTS**

Source: EUMOFA (updated 8.11.2016).

Figure 23. **OCTOPUS: EXTRA-EU IMPORTS by country of origin (million EUR)**

Source: EUMOFA (updated 8.11.2016).

Octopus accounts for 36% and 27% of the import value and volume, respectively, of the cephalopods commodity group. Imports grew 10% in value in S1-2016, whereas prices increased 5% from 5,59 EUR/kg in S1-2015. Morocco, the major supplier, provided 28.700 tonnes of octopus to the EU in S1-2016 (+11%), worth EUR 200 million (+19%). Spain (EUR 162 million, +19%) and Italy (EUR 111 million, +8%) are the main importers of octopus, accounting for 85% of total import value.

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

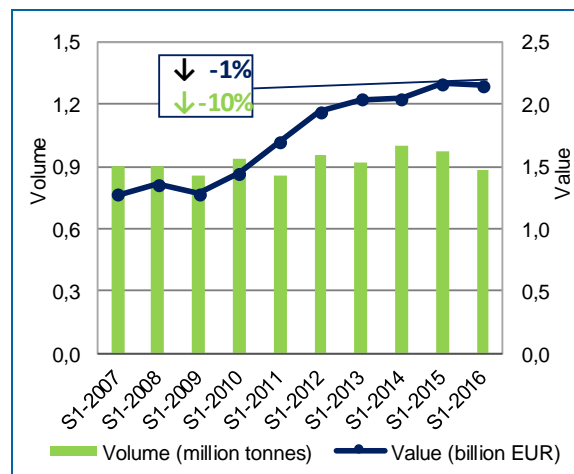
First sales: Portugal (3/2016, 1/2015, February & August-September 2013)

Trade: Extra-EU exports (4/2015)

Price structure: Portugal (May 2013)

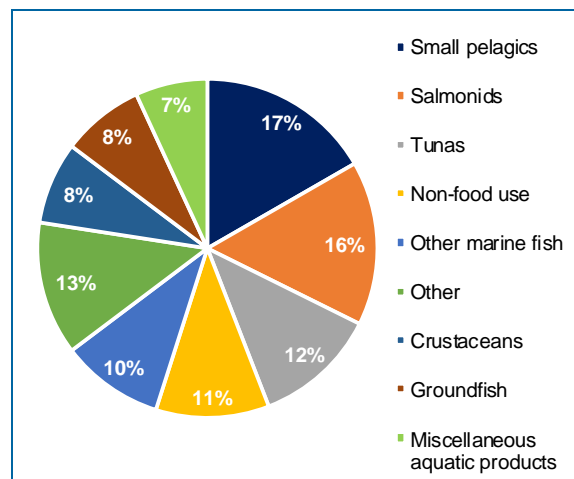
Consumption: Italy, Portugal (1/2016)

**EXTRA-EU EXPORTS:** Small pelagics (-17%) and non-food use (-9%) were the main reasons for the overall decrease in extra-EU export value in the first half of 2016.

Figure 24. **EXTRA-EU EXPORTS**

Source: EUMOFA (updated 8.11.2016).

Small pelagics, salmonids, tuna and tuna-like species, and non-food use represent 56% of the value and 71% of the volume of all extra-EU exports. Small pelagics experienced the highest net decrease in both value (-EUR 74 million) and volume (-60.100 tonnes). Tuna and tuna-like species and non-food use contributed to the volume decrease with 29.000 tonnes and 17.000 tonnes, respectively.

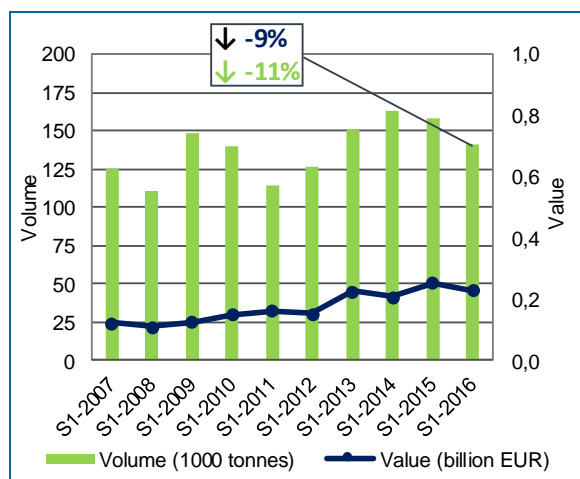
Figure 25. **EXTRA-EU EXPORTS: CONTRIBUTION OF MAIN COMMODITY GROUPS (BY VALUE)**

Source: EUMOFA (updated 8.11.2016).



**Non-food-use** extra-EU exports were the fourth largest commodity group exported to third countries. They ended at EUR 230 million (–9%) and 141.000 tonnes (–11%) in S1-2016. Fishmeal and fish oil accounted for 93% of all non-food export value.

Figure 26. **NON-FOOD USE: EXTRA-EU EXPORTS**

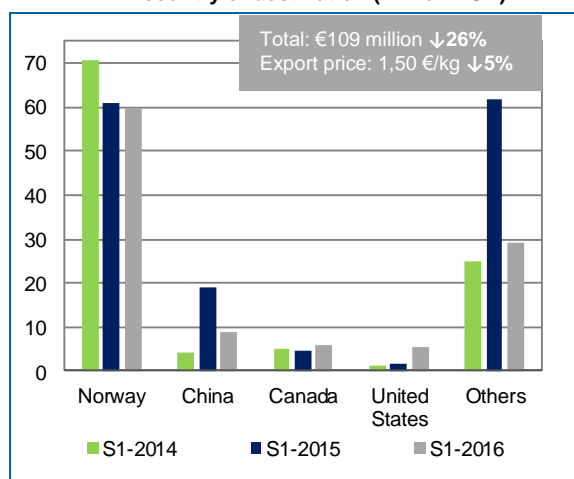


Source: EUMOFA (updated 8.11.2016).

Fishmeal exported by the EU represented 48% of the value and 52% of the volume of the non-food exported. It ended at EUR 109 million (–26%) for 72.600 tonnes (–22%). Denmark is by far the largest exporter, accounting for 57% of the value and 56% of the volume of EU fishmeal exports. In S1-2016, Denmark's export price of fishmeal increased 4% over S1-2015, reaching 1,53 EUR/kg; however, both value (–37%) and volume declined (–35%).

Norway is the EU's main export market of fishmeal. In S1-2016, it was worth EUR 59,5 million at 40.800 tonnes, decreasing slightly in value (–2%) from S1-2015, owing to an increase in volume (+4%). Exports to China decreased in both value and volume (–53% and –49%, respectively). By contrast, exports to both the USA (+219%) and Canada (+25%) increased in value.

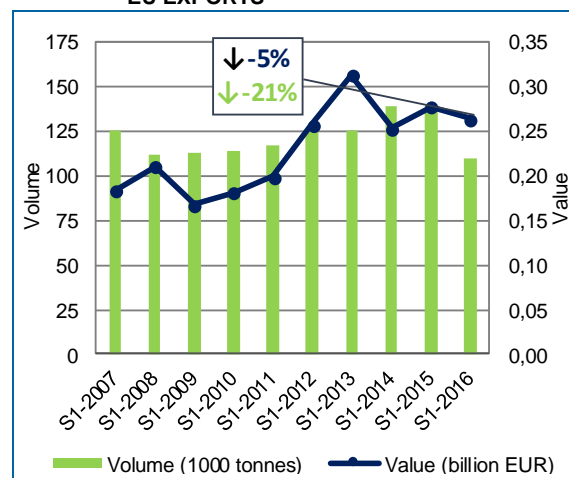
Figure 27. **FISHMEAL: EXTRA-EU EXPORTS by country of destination (million EUR)**



Source: EUMOFA (updated 8.11.2016).

**Tuna and tuna-like species** exports decreased 5% in value and 21% in volume. Bluefin, skipjack, and yellowfin tuna were the most representative main commercial species. The largest market for tuna and tuna-like species is Japan (mainly bluefin tuna for consumption), which accounts for 26% of all extra-EU exports. The other main destinations for EU tuna are Côte d'Ivoire, the Seychelles and Mauritius (skipjack and yellowfin tuna for the canning industry). The species are landed in these countries by French and Spanish fleets fishing in the Indian Ocean and in the Gulf of Guinea (Senegal and Ghana).

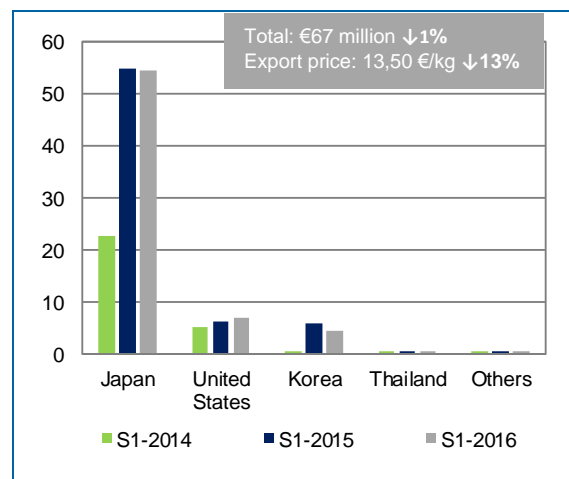
Figure 28. **TUNA AND TUNA-LIKE SPECIES: EXTRA-EU EXPORTS**



Source: EUMOFA (updated 8.11.2016).

Bluefin tuna is exported mainly fresh. The main destination countries are Japan and the USA, which absorb 82% and 11%, respectively, of the value of EU bluefin tuna exports. Exports to Japan decreased slightly (–0,4%), while exports to the USA increased (+13%) in the first six months of 2016, compared with the same period a year before.

Figure 29. **BLUEFIN TUNA: EXTRA-EU EXPORTS by country of destination (million EUR)**



Source: EUMOFA (updated 8.11.2016).

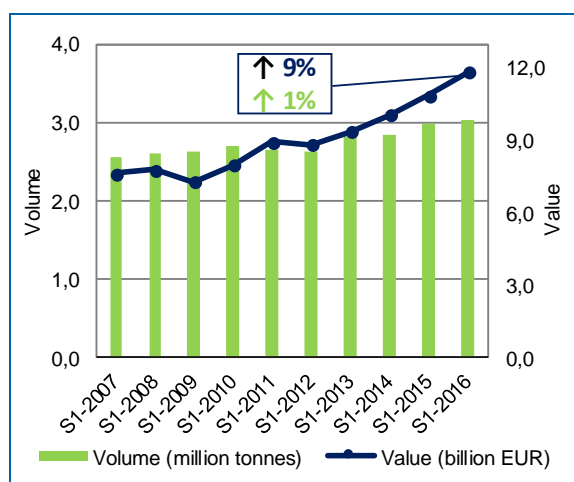
### 3.2. INTRA-EU TRADE

Trade between EU Member States (intra-EU exports) increased 9% in value and 1% in volume over S1-2015. More than 3 million tonnes of fish and fishery products were traded with a value close to EUR 12 billion. The average export price reached 3,91 EUR/kg, 7% higher. Most of the volume traded was fresh (35%) and frozen (28%) products.

Crustaceans, groundfish, and salmonids commodity groups made up 56% of value and 37% of volume of total trade between Member States in S1-2016. Salmonids (+18%), groundfish, and crustaceans (both +7%) were the main contributors to the overall increase in value.

Other commodity groups contributing to the increase were tuna and tuna-like species, cephalopods, other marine fish, and bivalves and other molluscs and aquatic invertebrates.

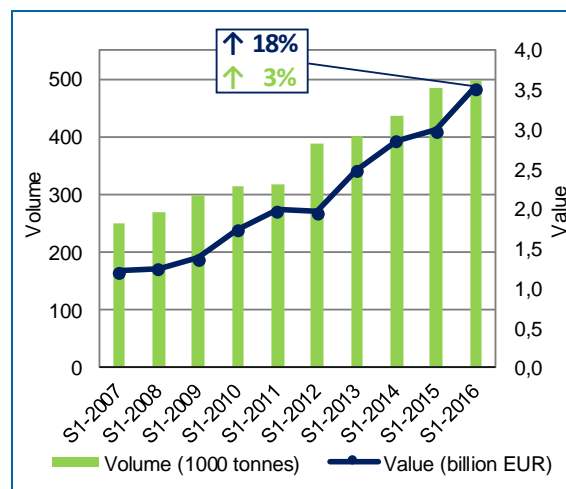
Figure 30. INTRA-EU TRADE



Source: EUMOFA (updated 8.11.2016).

**Salmonids** intra-EU trade was worth EUR 3,53 billion (+18%) at 497.000 tonnes (+3%) in the first half of 2016. The average export price increased from 6,17 EUR/kg in 2014 to 7,10 EUR/kg (+15%) in S1-2016. Salmon and trout accounted for 95% of the export value of the salmonids commodity group.

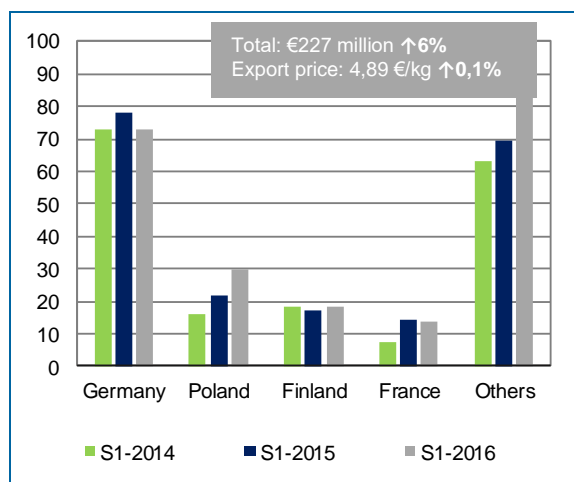
Figure 31. SALMONIDS: INTRA-EU TRADE



Source: EUMOFA (updated 8.11.2016).

Trout export value reached EUR 227 million at 46.000 tonnes. Both export value and volume increased 13%, while the average price remained stable at 4,90 EUR/kg. Most trout is traded fresh (63% in value and 74% in volume) and smoked (22% in value and 9% in volume); the remaining is traded frozen between Member States. In S1-2016, the average price of both fresh and smoked trout increased 7%, ending at 4,17 EUR/kg and 11,52 EUR/kg, respectively. However, smoked trout experienced decreases in both value (-15%) and volume (-20%). Denmark and Sweden account for 45% of the total export value in the EU, and they experienced significant increases in their export value (+14% and +54%, respectively), over S1-2015.

Germany (EUR 30,5 million and 7.600 tonnes), Poland (for processing purposes), Finland and France were the main markets for fresh trout. All main markets experienced increases over S1-2015. Germany was by far the largest market for smoked trout, with EUR 33,8 million and 2.900 tonnes. However, its imports decreased significantly (-22% value and -26% volume), in contrast to the average price, which reached 11,5 EUR/kg (+6%) compared with S1-2015.

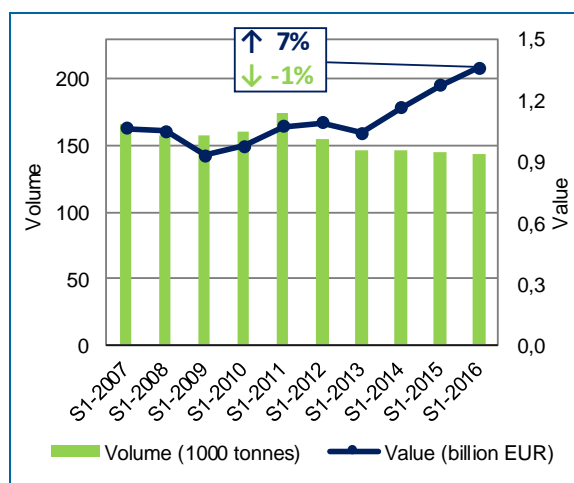
Figure 32. **TROUT: INTRA-EU TRADE** by country of destination (million EUR)

Source: EUMOFA (updated 8.11.2016).

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

Consumption: France (8/2016, 4&10/2015, August-September 2013), Belgium, Denmark, Germany, the Netherlands, the United Kingdom (8/2016, 4/2015), Italy (4&10/2015), Finland and Spain (4&10/2015, August-September 2013), Sweden (10/2015)

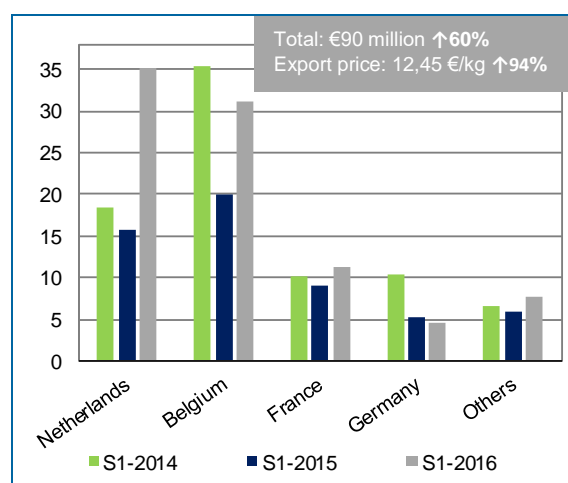
**Crustaceans** was the third largest commodity group (after salmonids and groundfish) traded between EU Member States, at EUR 1,36 billion (+7%) and 144.000 tonnes (-1%). The average export price reached 9,42 EUR/kg (+7%) in the first half of 2016, compared with the same period in 2015. Tropical shrimp, Norway lobster, and shrimp *Crangon* were the most valuable species traded within the crustaceans commodity group.

Figure 33. **CRUSTACEANS: INTRA-EU TRADE**

Source: EUMOFA (updated 8.11.2016).

Shrimp *Crangon* had an export value close to EUR 90 million (+60%), at 7.100 tonnes (19% less than the previous year). At 12,45 EUR/kg, the average price of shrimp *Crangon* increased 94% over S1-2015. Most shrimp *Crangon* (83%) is recorded as being traded fresh (although it is cooked on board).

The Netherlands, Belgium, France, and Germany accounted for 91% of the shrimp *Crangon* traded within the EU. The Netherlands (+123%) and Belgium (+55%) experienced the largest increases in value and in the average price, at 8,39 EUR/kg (+147%) and 27,73 EUR/kg (+107%).

Figure 34. **SHRIMP CRANGON: INTRA-EU TRADE** by country of destination (million EUR)

Source: EUMOFA (updated 8.11.2016).

We have covered **shrimp Crangon** in previous *Monthly Highlights*:

First sales: Denmark (7/2016)

## 4. Consumption

### HOUSEHOLD CONSUMPTION IN THE EU

In August 2016, the consumed volume of fresh fisheries and aquaculture products increased in seven Member States, decreased in three and remained stable in two, compared with August 2015. Values remained stable in two Member States, decreased in four and increased in six.

The greatest increase in volume of consumed fresh fisheries and aquaculture products was observed in

Denmark (+11%), followed by Portugal (+7%) and the Netherlands (+6%). Poland and Sweden displayed the greatest decrease (-5% and -6%, respectively).

In August 2016, the greatest decrease in consumption value was observed in the UK (-14%) and the greatest increase was registered in Sweden (+7%).

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

Country	Per capita consumption 2014* (live weight equivalent) Kg/capita/year	August 2014		August 2015		July 2016		August 2016		Change from August 2015 to August 2016	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	22,1	668	9,63	700	10,17	691	10,96	632	9,34	11%	8%
Germany	13,3	3.829	57,44	4.322	61,85	4.986	74,32	4.162	62,03	4%	0%
France	34,4	18.907	180,51	17.050	164,22	17.023	179,73	16.804	174,48	1%	6%
Hungary	4,6	407	1,55	348	1,64	262	1,07	338	1,55	3%	5%
Ireland	23,0	701	9,80	845	11,54	884	12,50	844	12,11	0%	5%
Italy	28,9	25.298	195,44	25.957	209,25	22.519	181,49	26.328	216,17	1%	3%
Netherlands	22,6	2.118	24,46	2.219	26,84	1.591	21,16	2.084	26,23	6%	2%
Poland	13,0	3.253	18,71	3.098	18,01	3.165	17,79	3.262	18,37	5%	2%
Portugal	55,3	4.778	28,01	4.960	27,67	4.606	28,64	4.647	28,45	7%	3%
Spain	46,2	50.387	351,44	48.411	341,49	51.763	380,04	46.931	340,59	3%	0%
Sweden	33,2	748	12,12	732	11,64	584	10,34	780	12,44	6%	7%
UK	24,9	21.942	233,61	22.327	265,03	22.793	232,37	22.348	228,88	0%	14%

Source: EUMOFA (updated 14.11.2016).

\* Data on per capita consumption for all EU Member States can be found at:

<http://www.eumofa.eu/documents/20178/77960/The+EU+fish+market+-+2016+Edition.pdf/ca1e7801-c4da-4799-aa00-f3d1784a3021>

In general, in the month of August in the past three years, the consumption trend in the 12 Member States followed mainly an increasing trend in both volume and value. However, it remained low compared with the other months of the year. Since 2013, the volume of consumption of fresh fisheries and aquaculture products in August, fluctuated in both Hungary and Sweden. In Denmark, Germany, Ireland, Italy, Poland, Portugal, Spain and the United Kingdom the consumed volumes were higher in 2013, however, since then they decreased and remained under the yearly average level.

On the contrary, in the Netherlands, since 2013, when the consumption level volume was lower, it increased and remained above the yearly average. In France, the consumption volume remained under the yearly average in August. In value, the consumption level in eight Member States was lower than the yearly average, with the lowest registered in Hungary and Poland. In Denmark and Portugal, the value fluctuated above and under the yearly average for the past 3-year period. In Sweden, the consumption value level remained higher in August.

## 4.1. FRESH POLLACK



**Habitat:** A finfish living on hard bottoms, inshore and offshore waters, down to 200 m depth.<sup>23</sup>

**Catch area:** Celtic Sea, the English Channel, northern Bay of Biscay.<sup>24</sup>

**Main producing countries in Europe:** France, the UK, Norway, Ireland, and Denmark.<sup>25</sup>

**Production method:** Caught.

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

**Presentation:** Whole, filleted, in steaks.

**Preservation:** Fresh, chilled, frozen.

**Ways of preparation:** Cooked, baked and fried.

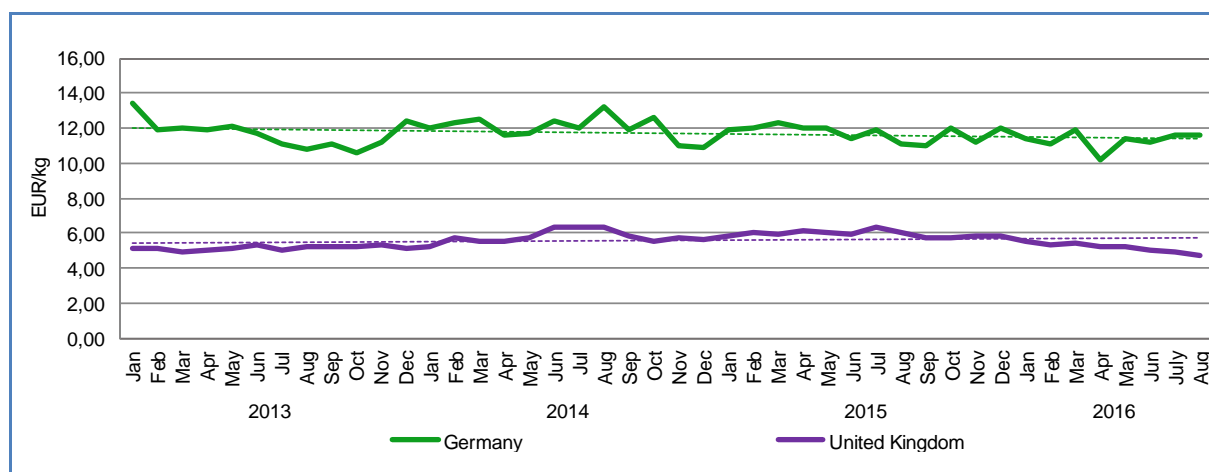
### GENERAL OVERVIEW OF HOUSEHOLD CONSUMPTION IN GERMANY AND THE UK

The overall per capita consumption in Germany and the UK is below average in the EU. In Germany, per capita consumption of fish and seafood products was 13,3 kg in 2014, 48% lower than the EU average (25,5 kg). However, it increased 1% from 2013. The UK registered 24,9 kg per capita consumption of fish and seafood products in 2014. It was 2% lower than the EU average and 55% lower than the highest per capita consumption in the EU (Portugal, 55,3 kg). Similar to Germany, in the UK the per capita consumption increased 1% over the previous year. See more on per capita consumption in the EU in Table 3.

In the UK, pollack is the third most-consumed whitefish species after cod and haddock, and is considered as an alternative to these two species.<sup>26</sup>

During January 2013–August 2016, retail prices of fresh pollack demonstrated a slight decreasing trend in Germany and an opposite trend in the UK. In Germany, the volume consumed exhibited a relatively stable pattern, while in the UK the volume consumed is seasonal, with highest spikes in January. Prices in Germany were more than double of those in the UK. By contrast, the volume sold in Germany was approximately six times lower than in the UK.

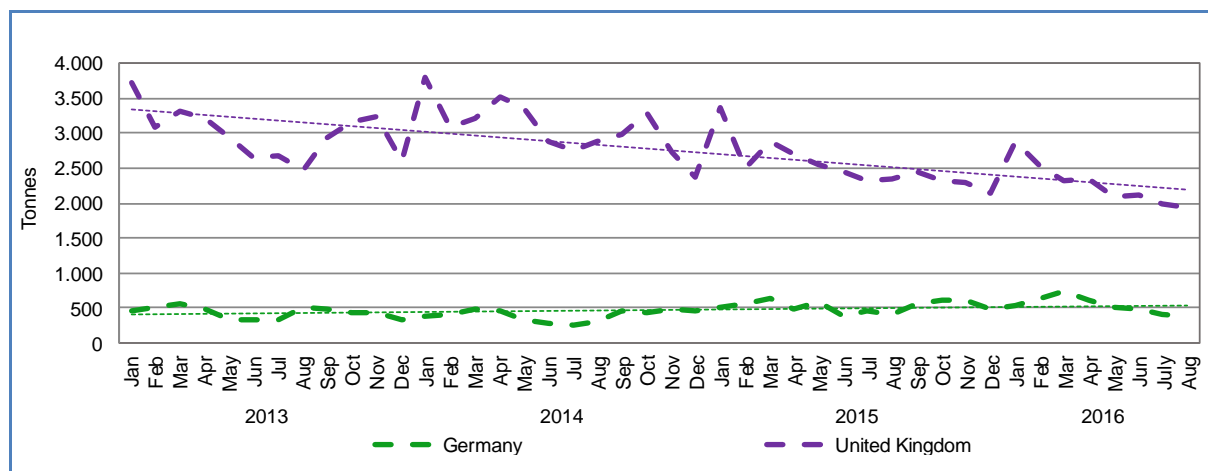
Figure 35. RETAIL PRICES OF FRESH POLLACK



Source: EUMOFA (updated 14.11.2016).



Figure 36. VOLUME SOLD OF FRESH POLLACK



Source: EUMOFA (updated 14.11.2016).

## GERMANY

**Long-term trend, January 2013–August 2016:** decreasing slightly in price, and increasing in volume.

**Average price:** 11,70 EUR/kg (2013), 12,04 EUR/kg (2014), 11,75 EUR/kg (2015).

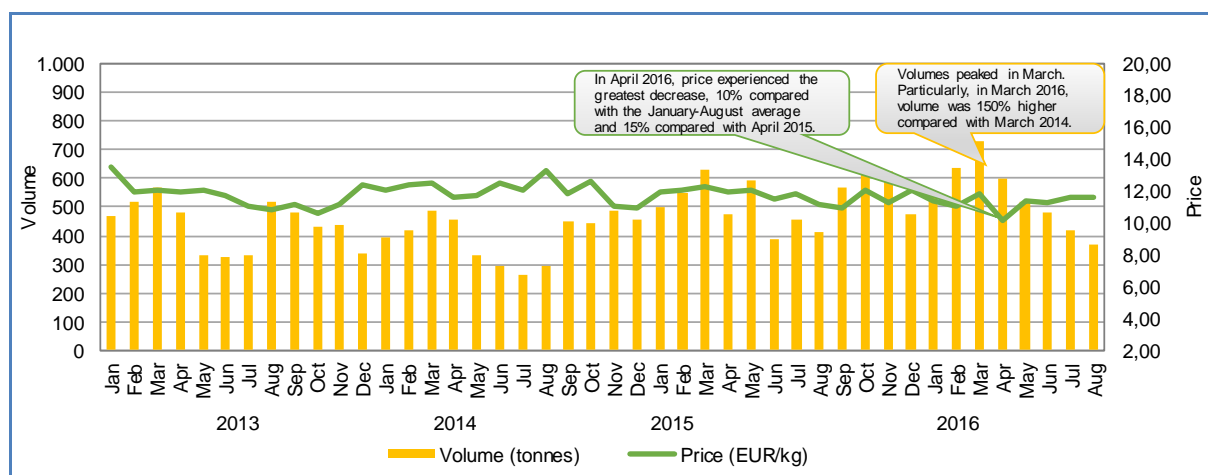
**Total consumed volume:** 5.225 tonnes (2013), 4.771 tonnes (2014), 6.285 tonnes (2015).

**Short-term trend, January–August 2016:** increasing in price, and decreasing in volume.

**Average price:** 11,31 EUR/kg.

**Total consumed volume:** 4.302 tonnes.

Figure 37. RETAIL PRICE AND VOLUME SOLD OF FRESH POLLACK



Source: EUMOFA (updated 14.11.2016).

## UNITED KINGDOM

**Long-term trend, January 2013–August 2016:** increasing slightly in price, and decreasing in volume.

**Average price:** 5,16 EUR/kg (2013), 5,80 EUR/kg (2014), 5,97 EUR/kg (2015).

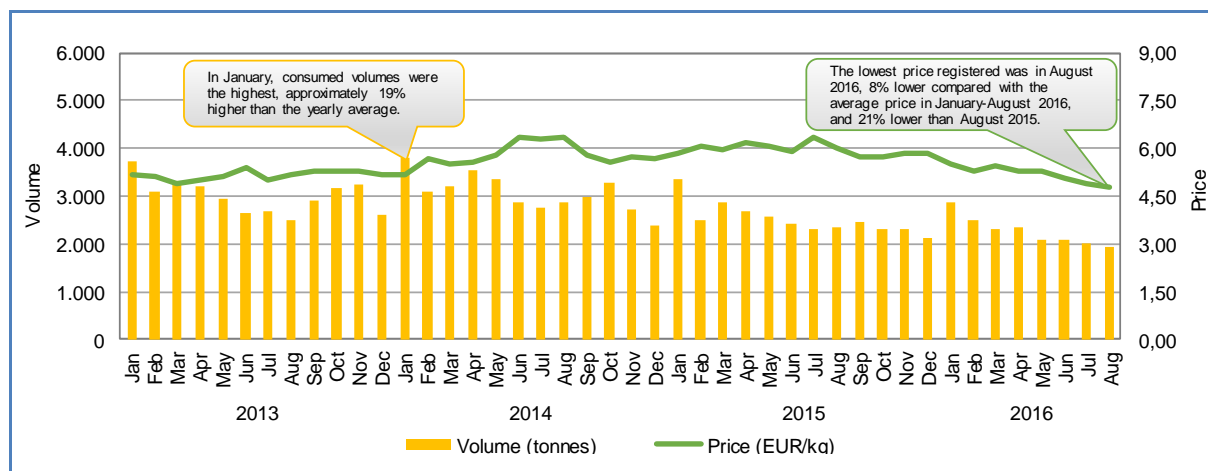
**Total consumed volume:** 35.982 tonnes (2013), 36.878 tonnes (2014), 30.325 tonnes (2015).

**Short-term trend, January–August 2016:** decreasing in both price and volume.

**Average price:** 5,19 EUR/kg.

**Total consumed volume:** 18.188 tonnes.

Figure 38. RETAIL PRICE AND VOLUME SOLD OF FRESH POLLACK

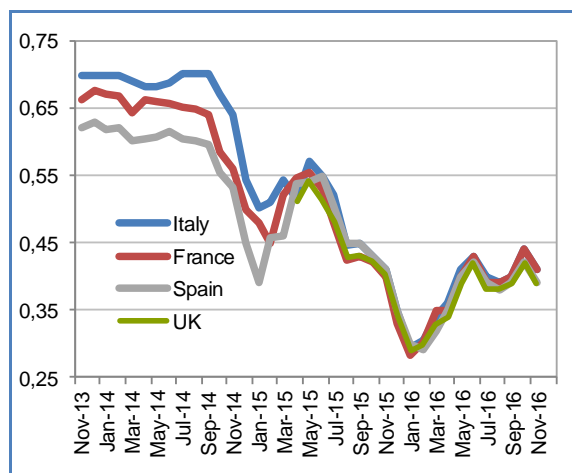


Source: EUMOFA (updated 14.11.2016).

## 5. Macroeconomic context

### 5.1. MARINE FUEL

Figure 39. **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 (June 2015–November 2016).

In November 2016, the fuel price in the French ports of Lorient and Boulogne was 0,41 EUR/litre and dropped 7% compared with October 2016. It increased 2% over November 2015.

In the Italian ports of Ancona and Livorno, the average price of marine fuel in November 2016 was 0,41 EUR/litre. It decreased 7% from the previous month and remained stable compared with November 2015.

The price of marine fuel in the ports of A Coruña and Vigo, Spain, reached on average 0,39 EUR/litre in November 2016, 7% lower than in October 2016. It was 5% less compared with November 2015.

The fuel price observed in the UK ports of Grimsby and Aberdeen was 0,39 EUR/litre and decreased 7% compared with the previous month. Compared with the same month a year ago, the fuel price decreased 3%.

### 5.2. FOOD AND FISH PRICES

Annual EU inflation was 0,5% in October 2016, up from 0,4% in September. In October 2016, the lowest negative annual rates were registered in Bulgaria and Cyprus (both -1%), while the highest annual rates were observed in Belgium (+1,9%) and Austria (+1,4%).

Compared with September 2016, annual inflation fell in 6 Member States, remained stable in 1 and rose in 21.

In October 2016, prices of food and non-alcoholic beverages remained stable, while prices of fish and seafood increased slightly (+0,3%) over the previous month (September 2016).

Since October 2014, both food and fish prices increased 0,4% and 4,5%, respectively.

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

HICP	Oct 2014	Oct 2015	Sep 2016	Oct 2016
<b>Food and non-alcoholic beverages</b>	99,47	100,09	99,85	99,89
<b>Fish and seafood</b>	99,08	100,26	103,24	103,57

Source: Eurostat.

### 5.3. EXCHANGE RATES

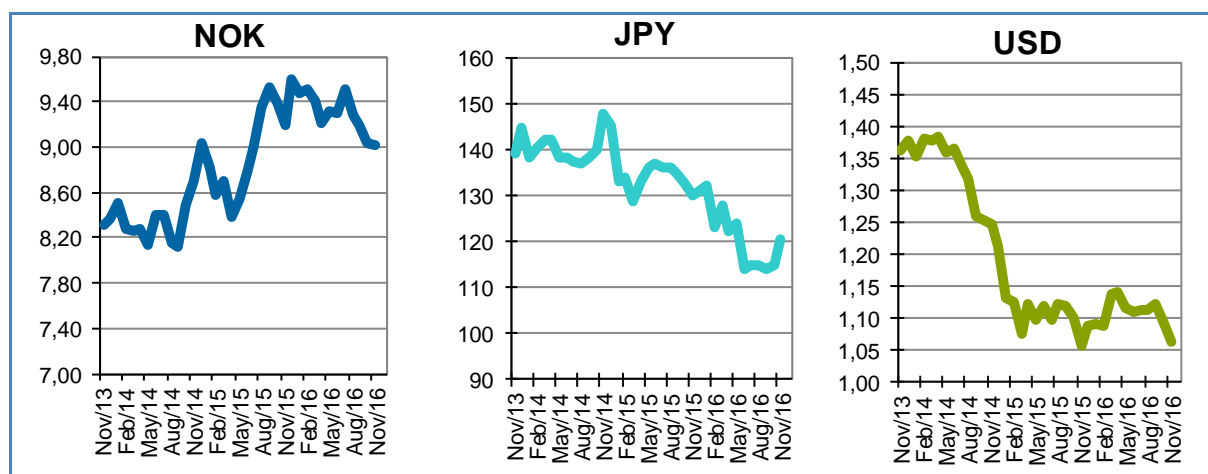
In November 2016, the euro depreciated both against the Norwegian krone (-0,2%) and the US dollar (-2,8%), and appreciated against the Japanese yen (+4,8%) from October 2016. For the past six months, the euro has fluctuated around 9,22 against the Norwegian krone. Compared with a year earlier (November 2015), the euro has depreciated -1,9% against the Norwegian krone and -7,5% against the Japanese yen, and appreciated slightly (+0,5%) against the US dollar.

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

Currency	Nov 2014	Nov 2015	Oct 2016	Nov 2016
<b>NOK</b>	8,6975	9,1935	9,0345	<b>9,0190</b>
<b>JPY</b>	147,69	130,22	114,97	<b>120,48</b>
<b>USD</b>	1,2483	1,0579	1,0946	<b>1,0635</b>

Source: European Central Bank.

Figure 40. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

#### 5.4. EUROPEAN UNION ECONOMIC OVERVIEW

In July–September 2016, seasonally adjusted EU GDP increased 0,4% over the previous quarter, January–March 2016. It also increased 1,8% over the same quarter of the previous year.

In the EU Member States, the quarterly GDP growth rates were the highest in Bulgaria and Portugal (both 0,8%) in the third quarter of 2016. In Portugal, it increased 0,5% over the previous quarter; however, in

Bulgaria it experienced a decline of 0,1%. Spain, Cyprus and Slovakia registered a GDP growth rate of 0,7% in July–September 2016. The lowest quarterly GDP was registered in Lithuania with a rate of 0,1%, a drop of 0,3% from the previous quarter. Compared with the same quarter of the previous year, the highest GDPs were observed in Romania 4,6% and Bulgaria 3,5%. However, in both countries, it fell (–1,2% and –0,1%, respectively). In Latvia, the GDP growth rate was the lowest, 0,7%, compared with April–June 2015.<sup>27</sup>

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

**First sales:** EUMOFA; Puertos del estado; Danish AgriFish Agency; Statistics Portugal. Data analysed refers to the month of September 2016.

**Global supply:** European Commission, Directorate-General for Maritime Affairs and Fisheries (DG MARE); Argentinian Ministry of Agriculture and Industry; Statistics Iceland; Turkish Statistical Institute; Norwegian Seafood Council.

**Trade:** EUMOFA.

**Consumption:** EUMOFA; FAO; fishbase.org.

**Macroeconomic context:** EUROSTAT; ECB; Chamber of Commerce of Forli-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](http://www.eumofa.eu).



## 6. Endnotes

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

<sup>2</sup> Data refer to 31 government-owned ports. [http://www.puertos.es/en-us/estadisticas/Pages/estadistica\\_mensual.aspx](http://www.puertos.es/en-us/estadisticas/Pages/estadistica_mensual.aspx)

<sup>3</sup> <http://www.fao.org/fishery/species/2203/en> ; <http://www.fishbase.org/summary/35>

<sup>4</sup> [http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540355/IPOL\\_STU\(2015\)540355\\_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540355/IPOL_STU(2015)540355_EN.pdf)

<sup>5</sup>

[https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine\\_publicacoes&PUBLICACOESpub\\_boui=271434983&PUBLICACOESstem\\_a=5414331&PUBLICACOESmodo=2](https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_publicacoes&PUBLICACOESpub_boui=271434983&PUBLICACOESstem_a=5414331&PUBLICACOESmodo=2)

<sup>6</sup> <http://www.fao.org/fishery/species/2469/en>

<sup>7</sup> <http://www.fao.org/fishery/species/3270/en>

<sup>8</sup> <https://www.havochvatten.se/download/18.44ebc86154b1fe664ad95de/1464945142781/officiell-statistik-JO55SM1601.pdf>

<sup>9</sup> <https://www.havochvatten.se/en/swam/policy--regulation/commercial-fishing/landing-ports.html>

<sup>10</sup> <http://www.fao.org/fishery/species/3425/en>

<sup>11</sup> [http://www.imr.no/temasider/skalldyr/reke/reke\\_i\\_nordsjoen\\_og\\_skagerrak/nb-no](http://www.imr.no/temasider/skalldyr/reke/reke_i_nordsjoen_og_skagerrak/nb-no)

<sup>12</sup> <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016R0072&from=EN>

<sup>13</sup> [http://www.fisheries.no/ecosystems-and-stocks/marine\\_stocks/shellfish/shrimp/#.WDMD3ySlsfQ](http://www.fisheries.no/ecosystems-and-stocks/marine_stocks/shellfish/shrimp/#.WDMD3ySlsfQ)

<sup>14</sup> [https://ec.europa.eu/fisheries/deep-sea-fishing-opportunities-2017-2018-unanimous-agreement-deep-sea-quotas-next-two-years\\_en](https://ec.europa.eu/fisheries/deep-sea-fishing-opportunities-2017-2018-unanimous-agreement-deep-sea-quotas-next-two-years_en)

<sup>15</sup> [https://ec.europa.eu/fisheries/recovery-plan-mediterranean-swordfish\\_en](https://ec.europa.eu/fisheries/recovery-plan-mediterranean-swordfish_en)

<sup>16</sup> [https://ec.europa.eu/fisheries/progress-made-eu-mauritania-fisheries-partnership\\_en](https://ec.europa.eu/fisheries/progress-made-eu-mauritania-fisheries-partnership_en)

<sup>17</sup> <http://ec.europa.eu/trade/policy/countries-and-regions/regions/andean-community/>; EUMOFA.

<sup>18</sup> [http://www.agroindustria.gob.ar/sitio/areas/pesca\\_maritima/informes/coyuntura/\\_archivos/000001-2016/160901\\_Informe%20de%20coyuntura%20-%20Septiembre%202016.pdf](http://www.agroindustria.gob.ar/sitio/areas/pesca_maritima/informes/coyuntura/_archivos/000001-2016/160901_Informe%20de%20coyuntura%20-%20Septiembre%202016.pdf)

<sup>19</sup> <http://www.statice.is/publications/news-archive/fisheries/fish-catches-in-october-2016/>

<sup>20</sup> <http://www.turkstat.gov.tr/PreHaberBultenleri.do?id=21720>

<sup>21</sup> <http://www.feap.info/Default.asp?SHORTCUT=582>

<sup>22</sup> <http://en.seafood.no/News-and-media/News-archive/Press-releases/Norwegian-salmon-opens-up-new-markets>

<sup>23</sup> <http://www.fishbase.org/summary/34>

<sup>24</sup> <http://www.fao.org/fishery/species/2232/en>

<sup>25</sup> FAO Fishery Statistics.

<sup>26</sup> [http://www.seafish.org/media/publications/SIF5\\_Dec\\_2015.pdf](http://www.seafish.org/media/publications/SIF5_Dec_2015.pdf)

<sup>27</sup> <http://ec.europa.eu/eurostat/documents/2995521/7733706/2-15112016-AP-EN.pdf/9b8abaaa-3fdc-42e5-80b1-12bf2027e3ad>