

In this issue

Over the past 36 months (October 2016–September 2019), Denmark recorded the highest average price for European lobster (at 23,97 EUR/kg). This was 3% higher than across the same period in France (23,29 EUR/kg), and 37% higher than the average in the UK (17,48 EUR/kg). For Northern prawn, the average price in Sweden was more than double (+102%) that of the price in Denmark (4,96 EUR/kg).

The price of live lobsters (*Homarus* spp.) from the US was 15,65 EUR/kg in week 45 (the first week of November), up 19% from the same week in 2018. Prices oscillate from 12,00 EUR/kg to 25,00 EUR/kg and have shown a decreasing trend since the first week of 2017.

In January–September 2019, the average retail price of fresh shrimp *Crangon* spp. in the Netherlands was 29,54 EUR/kg, 26% lower compared to the same period in 2018.

In the first 10 months of 2019, Russian catches amounted to 4,25 million tonnes which is 90.000 tonnes lower than catches for the same period in 2018. The largest increase is seen for Alaskan pollock (+84.000 tonnes) and herring (+44.000 tonnes).

In 2018, the EU had a trade deficit of EUR 490.050 for abalone products. The deficit is mainly attributable to imports from Australia (56% of total extra-EU import value), Chile (56%), and New Zealand (16%).

At the beginning of December, the 2019 Edition of “The EU fish market” was released, providing a comprehensive economic overview of developments in the market for fisheries and aquaculture products. Among the main highlights is an increased aquaculture production reaching a 10-year high in 2017 with 1,37 million tonnes.



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1. First sales in Europe

In **January–September 2019**, 13 EU Member States (MS) and Norway reported first-sales data for 10 commodity groups¹. First-sales data are based on both first-sales notes and data collected from auction markets.

1.1. Compared to the same period last year

Increases in value and volume: First sales grew in Greece, Italy, Latvia, Portugal, Spain, and the United Kingdom. Increased supply of crustaceans was the main factor leading to higher first sales in the United Kingdom, while flatfish was the main cause for the increased first sales in Portugal.

Decreases in value and volume: First sales declined in Belgium, Denmark, France, Lithuania, the Netherlands, and Sweden. The drop in the Netherlands was mainly due to a steep decline in groundfish supply. The significant decline seen in Sweden was due to small pelagics and flatfish.

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

| Country | January–September 2017 | | January–September 2018 | | January–September 2019 | | Change from January–September 2018 | |
|----------------|------------------------|----------|------------------------|----------|------------------------|----------|------------------------------------|-------|
| | Volume | Value | Volume | Value | Volume | Value | Volume | Value |
| Belgium | 11.576 | 46,33 | 10.163 | 43,78 | 10.045 | 42,94 | -1% | -2% |
| Denmark | 187.005 | 257,00 | 189.474 | 255,50 | 172.994 | 237,52 | -9% | -7% |
| France | 143.147 | 485,02 | 141.554 | 470,67 | 133.968 | 454,65 | -5% | -3% |
| Greece | n/a | n/a | 15.852 | 33,07 | 18.050 | 35,82 | 14% | 8% |
| Italy | 71.154 | 256,26 | 64.619 | 237,43 | 65.069 | 261,18 | 1% | 10% |
| Latvia | 41.705 | 8,47 | 27.699 | 5,21 | 39.047 | 6,48 | 41% | 24% |
| Lithuania | 1.160 | 1,09 | 1.200 | 0,94 | 715 | 0,58 | -40% | -39% |
| Netherlands | 146.616 | 297,38 | 278.735 | 415,93 | 197.728 | 296,56 | -29% | -29% |
| Norway | 2.216.203 | 1.785,00 | 2.274.342 | 1.774,49 | 2.094.942 | 1.820,23 | -8% | 3% |
| Poland | 75.290 | 25,01 | 68.585 | 21,21 | 75.180 | 20,90 | 10% | -1% |
| Portugal | 74.070 | 149,13 | 78.212 | 153,06 | 82.563 | 162,19 | 6% | 6% |
| Spain | 356.244 | 900,69 | 373.566 | 1028,69 | 376.346 | 1066,55 | 1% | 4% |
| Sweden | 450.751 | 333,24 | 420.135 | 241,55 | 235.663 | 114,59 | -44% | -53% |
| United Kingdom | 228.030 | 415,23 | 184.013 | 335,41 | 208.939 | 436,88 | 14% | 30% |

* Volume data are reported in net weight for EU Member States and in live weight equivalent (LWE) for Norway. Prices are reported in EUR/kg (without VAT). For Norway, they are reported in EUR/kg of live weight.

**Partial data. First-sales data for Italy covers 229 ports (approximately 50% of the total landings).

Source: EUMOFA (updated 17.11.2019).

¹ Commodity groups for which first sales are reported are: bivalves and other molluscs, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, salmonids, small pelagics, and other marine fish.

1.2. In September 2019

Increases in value and volume: First sales grew in Belgium, Greece, Latvia, and the United Kingdom. The increase in Greece was due to a higher supply of octopus and deep-water rose shrimp.

Decreases in value and volume: First sales declined in Denmark, France, Lithuania, the Netherlands, Poland, Portugal, and Sweden. For Sweden, the decline was due to a significant decrease in herring and coldwater shrimp supply. In Lithuania, first sales decreased due to the European Commission's emergency measures on limiting fishery for eastern Baltic cod stocks.

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

| Country | September 2017 | | September 2018 | | September 2019 | | Change from September 2018 | |
|----------------|----------------|--------|----------------|--------|----------------|--------|----------------------------|-------|
| | Volume | Value | Volume | Value | Volume | Value | Volume | Value |
| Belgium | 1.309 | 5,57 | 1.110 | 4,48 | 1.263 | 4,98 | 14% | 11% |
| Denmark | 35.618 | 37,82 | 29.625 | 31,22 | 21.921 | 30,49 | -26% | -2% |
| France | 15.087 | 51,86 | 14.669 | 50,05 | 14.048 | 46,74 | -4% | -7% |
| Greece | n/a | n/a | 1.257 | 3,54 | 2.157 | 3,68 | 72% | 4% |
| Italy | 6.967 | 22,98 | 7.876 | 22,59 | 7.668 | 24,96 | -3% | 11% |
| Latvia | 5.476 | 1,11 | 2.318 | 0,40 | 3.893 | 0,62 | 68% | 56% |
| Lithuania | 51 | 0,05 | 31 | 0,03 | 8 | 0,01 | -74% | -57% |
| Netherlands | 32.181 | 53,28 | 40.523 | 60,71 | 31.945 | 44,03 | -21% | -27% |
| Norway | 212.669 | 210,89 | 151.758 | 143,26 | 164.656 | 135,42 | 8% | -5% |
| Poland | 5.273 | 2,21 | 1.831 | 0,85 | 1.668 | 0,60 | -9% | -30% |
| Portugal | 11.092 | 17,50 | 16.208 | 21,28 | 15.183 | 20,70 | -6% | -3% |
| Spain | 37.189 | 91,07 | 36.932 | 100,13 | 36.356 | 100,64 | -2% | 1% |
| Sweden | 75.121 | 70,56 | 75.141 | 64,43 | 4.420 | 4,97 | -94% | -92% |
| United Kingdom | 18.234 | 31,09 | 18.889 | 36,75 | 30.700 | 51,44 | 63% | 40% |

*Volume data are reported in net weight for EU Member States and in live weight equivalent (LWE) for Norway. Prices are reported in EUR/kg (without VAT). For Norway, they are reported in EUR/kg of live weight.

**Partial data. First-sales data for Italy covers 229 ports (approximately 50% of the total landings). Volume data is also reported in net weight. Source: EUMOFA (updated 17.11.2019.)

The most recent weekly first-sales data (**up to week 49-2019**) is available via the EUMOFA website, and can be accessed [here](#).

The most recent monthly first-sales data **for October** is available via the EUMOFA website, and can be accessed [here](#).

1.3. First sales in selected countries


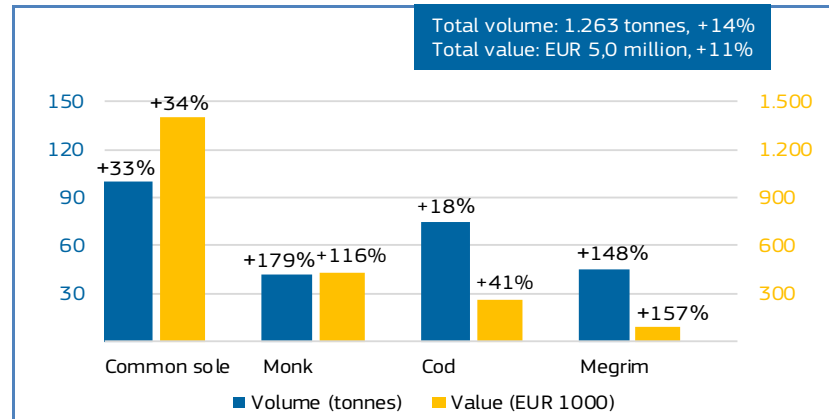
 In **Belgium** in **January–September 2019**, overall first-sales value and volume fell slightly – by 2% and 1%, respectively, in comparison with the same period in 2018. The species contributing the most to this decline were cuttlefish, European plaice, gurnard, and scallop. In **September 2019**, total value and volume increased over September 2018. Common sole, monk, ray, and megrim were the main species behind this. The price of monk fell by 23% as supply increased, with prices dropping to 10,11 EUR/kg. Despite some little fluctuations in the fishing calendar the catches of megrim continue to increase due to higher fishing opportunities in the North Sea (ICES areas 2a, 4, and 7).

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



Percentages show change from the previous year.
Source: EUMOFA (updated 17.11.2019).


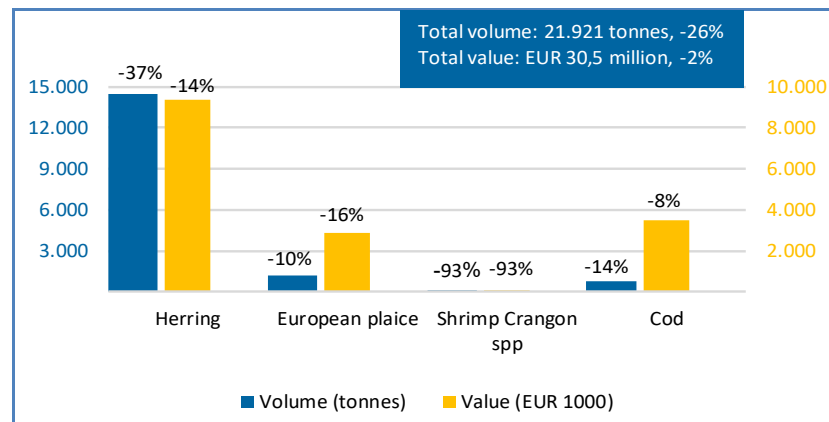
 In **Denmark** in **January–September 2019**, first-sales value fell by 7% mainly linked to sales of shrimp (*Crangon* spp.), while volume decreased by 9% compared to the same period in 2018, due to herring. In **September 2019**, first sales in both value and volume declined compared to September 2018. The main species driving this trend include herring, European plaice, shrimp *Crangon* spp., and cod. The price of herring increased by 37% due to its reduced supply. The shrimp *Crangon* spp. production in September 2019 was back to the (low) production level observed in September 2016 and 2017, which was among the lowest in the time-series of 10-year average. A strong fishery pressure on the stock as well as a high abundance of whiting as predator are the key factors behind for the low stock abundance in September 2019².

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



Percentages show change from the previous year.
Source: EUMOFA (updated 17.11.2019).

² ICES Working Group report (WGCRA).


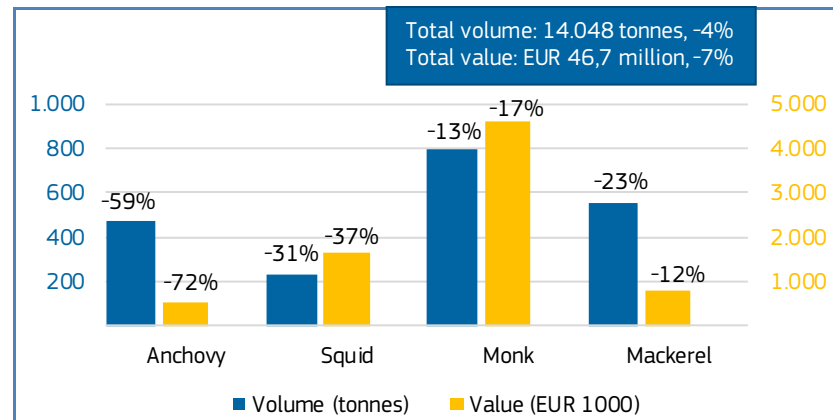
 In **France** in **January–September 2019**, first sales decreased by 3% in value and 5% in volume compared to January–September 2018. The value of monk and cuttlefish, and the volume of clam and hake, were the main factors behind these decreases. In **September 2019**, compared to September 2018, anchovy, squid, monk, and mackerel, were among the key species responsible for decreases in value and volume. The strong decrease in anchovy first sales in the Bay of Biscay is explained by the fact of the earlier fishing season, which occurred a month earlier, i.g. in August, which was the second-best month in terms of catches since 2010.

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, SEPTEMBER 2019**



Percentages show change from the previous year.
Source: EUMOFA (updated 17.11.2019).


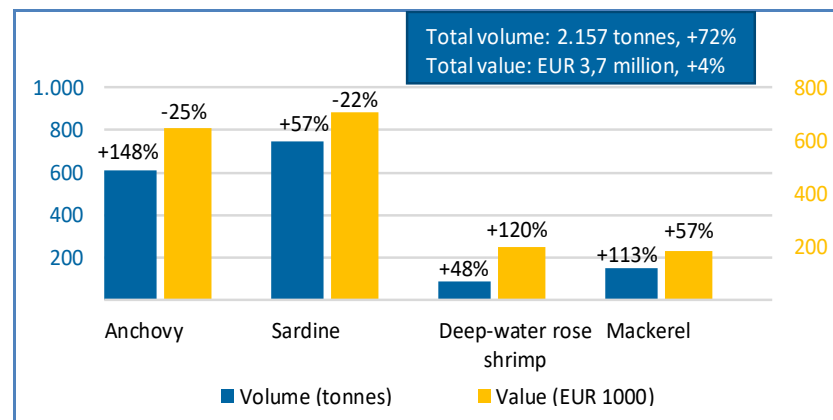
 In **Greece** in **January–September 2019**, compared to the same period in 2018, first-sales value and volume increased by 8% and 14%, respectively, linked to sales of sardine, red mullet, mackerel, hake, and squid. In **September 2019**, first-sales value and volume were higher than in 2018. In terms of value increase, deep-water rose shrimp sales were the most significant, and in terms of volume, anchovy and sardine were among the species responsible for the overall increases. The increase in sardine sales is due to the higher availability of target species in the Aegean Sea, related with the higher recruitment and spawning stock biomass. Due to high levels of supply, price of sardine decreased by 50%.

Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GREECE, SEPTEMBER 2019**



Percentages show change from the previous year.
Source: EUMOFA (updated 17.11.2019).


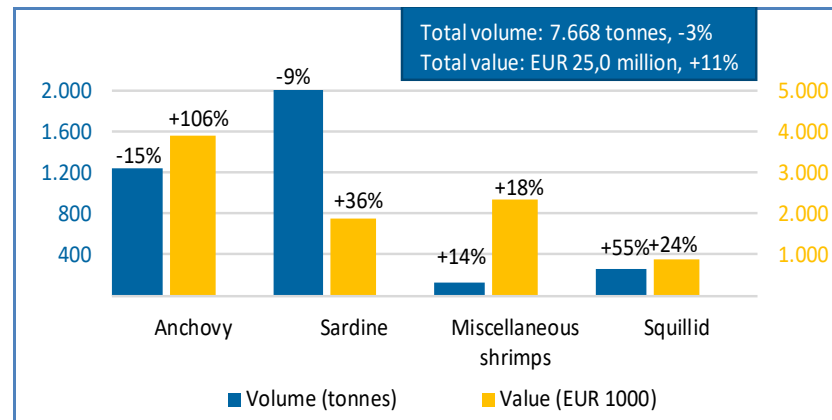
 In **Italy** in **January–September 2019**, compared to the same period in 2018, first-sales value grew by 10%, and volume by 1%. These changes were mainly due to miscellaneous shrimps*, anchovy, and sardine. In **September 2019**, first sales increased in value, while in volume they slightly decreased compared to September 2018. Anchovy and sardine, the main species in terms of overall volume share (44%) were responsible for both value increase and volume decrease. The 15% volume decrease of anchovy is probably due to the lower availability of target species in the key fishing area (Adriatic Sea), related with the decreasing trend in recruitment and spawning stock biomass. Consequently, its price significantly increased, by 144%.

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



Percentages show change from the previous year. Source: EUMOFA (updated 17.11.2019).
*EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>)


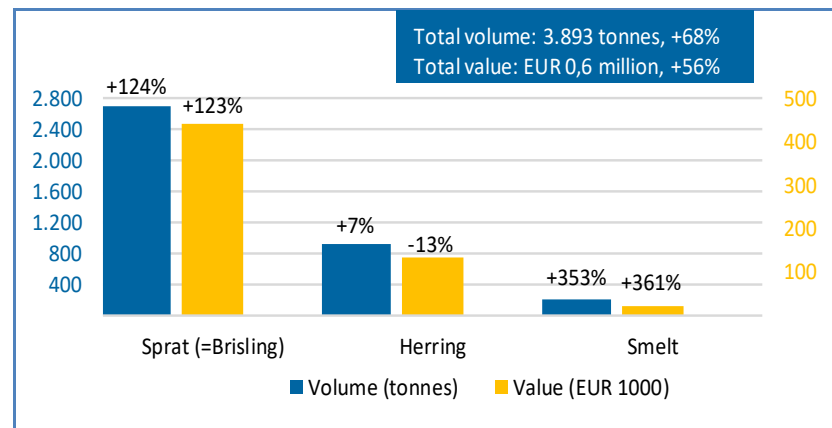
 In **Latvia** in **January–September 2019**, small pelagic species (sprat, herring, smelt) were the key species responsible for increases in first-sales value and volume (+24% and +41%, respectively) compared to the same period in 2018. In **September 2019**, first sales sharply increased in both value and volume compared to September 2018, mainly due to sales of sprat, which makes up 69% of the overall catch. First sales of sprat increased due to market demand and high export opportunities for its frozen products. It should be noted that the increases of volumes in September 2019 have not affected the price and remains the same as it was in August 2019 or September 2018.

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



Percentages show change from the previous year. Source: EUMOFA (updated 17.11.2019).


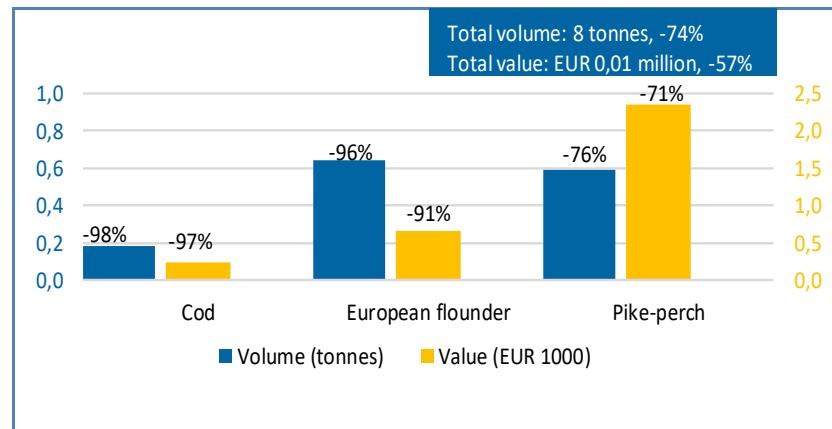
 In **Lithuania** in **January–September 2019**, first sales decreased by 39% in value and 40% in volume compared to January–September 2018, mainly due to declines in cod and herring. In **September 2019**, first-sales value and volume significantly decreased compared to September 2018, largely due to cod, European flounder and pike-perch. Following the Commission’s adoption of measures to alleviate a serious threat to eastern Baltic cod stocks, only vessels less than 12 meters length fishing with passive gears, were involved in the cod fishery in the ICES subdivisions 24, 25 and 26. Of the total catch volume, after each fishing trip, only 10% of cod was allowed. As for flounder, the low supply was the indirect result of the same measure, as it is a by-catch fraction of bottom trawls fisheries. Due to a low supply of fresh European flounder at the market, its average price more than doubled in September 2019, compared to the same month in 2018, reaching 1,04 EUR/kg (+115%).

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



Percentages show change from the previous year.
Source: EUMOFA (updated 17.11.2019).


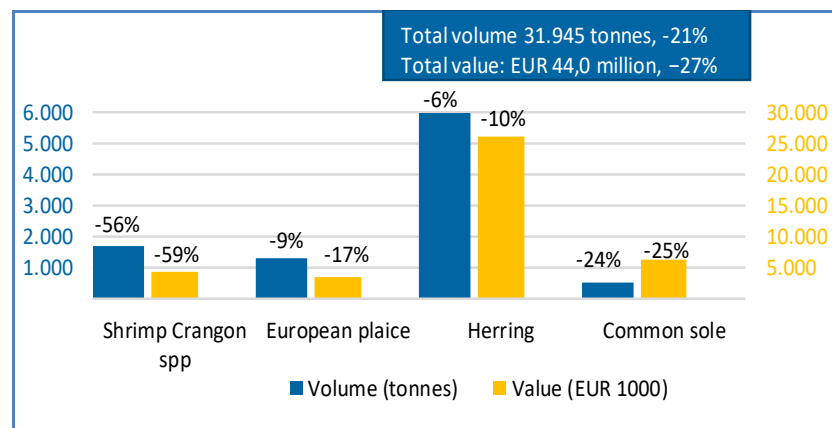
 In the **Netherlands** in **January–September 2019**, first sales fell by 29% in both value and volume compared to the same period in 2018. This was mainly due to a significant decrease in supply of blue whiting (-46% in value and -45% in volume). In **September 2019**, first-sales value fell in comparison to the same month in the previous year, mostly due to shrimp *Crangon* spp., blue whiting, herring, and common sole. Shrimp *Crangon* spp. production is back to the production level in September 2017, which is a high stock decline due to high exploitation rate.

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



Percentages show change from the previous year.
Source: EUMOFA (updated 17.11.2019).


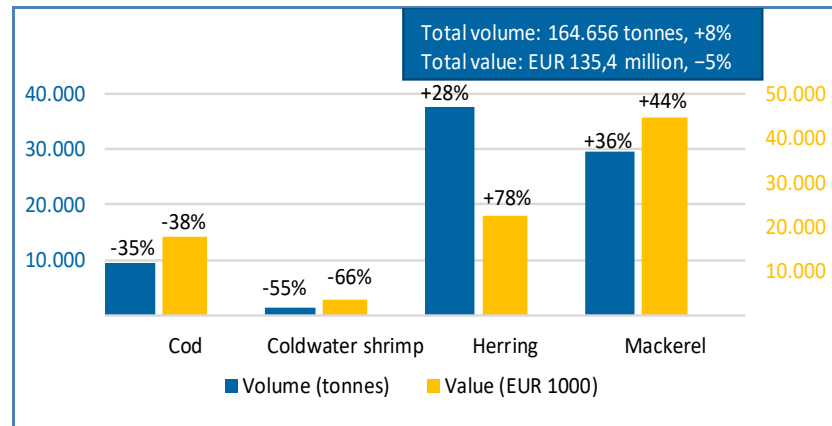
 In **Norway** in **January–September 2019**, first sales increased by 3% in value and decreased by 8% in volume compared to the same period in 2018. Value grew due to mackerel sales, whereas volume fell due to miscellaneous small pelagic species* and blue whiting. In **September 2019**, compared to September 2018, first-sales value fell, while volume grew. The main species contributing to the decrease in value were cod and coldwater shrimp, while volume increase was the result of a higher supply of herring and mackerel. The average price of herring increased by 40% to 0,59 EUR/kg.

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



Percentages show change from the previous year. Volume data is reported in live weight equivalent (LWE). Prices are reported in EUR/kg of live weight. *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).


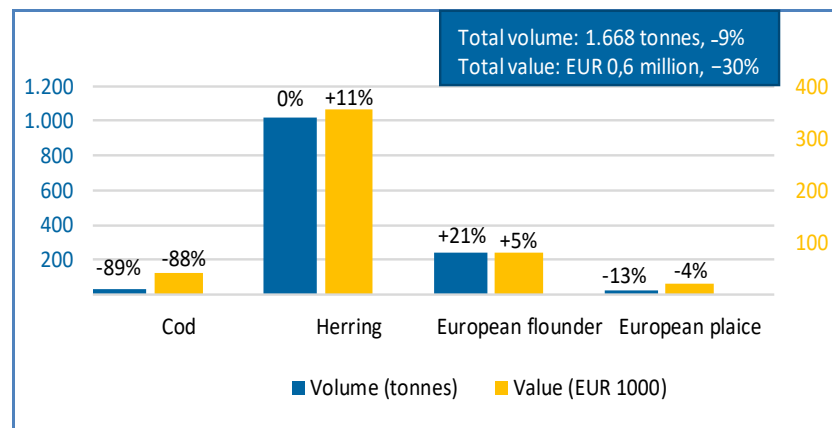
 In **Poland** in **January–September 2019**, first sales decreased by 1% in value (due to sales of trout and herring), while volume increased by 10% (due to sales of sprat and European flounder), compared to the same period in 2018. In **September 2019**, first-sales value and volume dropped compared to September 2018, with cod being the main species behind this sharp decrease. Cod sales decreased due to the Commission's emergency measures on eastern Baltic cod stocks, in which only cod from by-catch and small-scale fishery was allowed to market. However, the significant decrease in volume of cod supply to the market has not affected the price, which remained stable compared to September 2018.

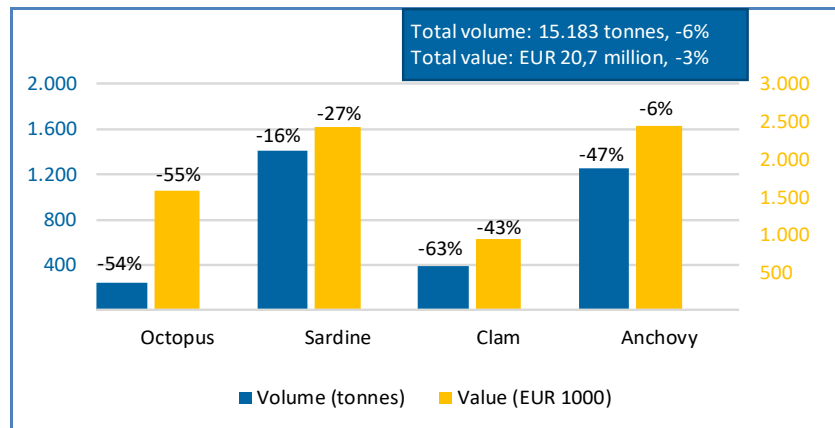
Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, SEPTEMBER 2019**



Percentages show change from the previous year. Source: EUMOFA (updated 17.11.2019).

 In **Portugal** in **January–September 2019**, first sales increased by 6% in both value and volume in comparison to the same period in 2018. These increases were mostly linked to sales of Atlantic horse mackerel, mackerel, and anchovy. In **September 2019** compared to September 2018, this trend has reversed; as first-sales value and volume decreased, largely due to octopus, sardine, clam, and anchovy. High decrease in clam (cockle) supply is associated with massive bivalve mortalities, as well as long periods of interdiction of the activity due to biotoxins. Anchovy recorded a price increase of 78% (reaching 1,95 EUR/kg) due to the reduction in its supply.

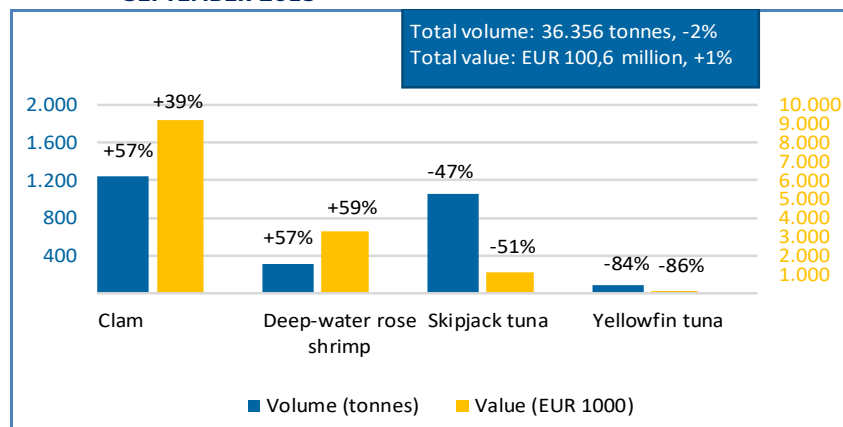
Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, SEPTEMBER 2019**



Percentages show change from the previous year.
Source: EUMOFA (updated 17.11.2019).

 In **Spain** in **January–September 2019**, first sales increased in value by 4% and in volume by 1% due to sales of anchovy, albacore tuna, Atlantic horse mackerel, and octopus, compared to the same period in 2018. In **September 2019**, value increased in comparison to the same month in 2018, due to sales of clam and deep-water rose shrimp. In contrast, volume decreased, mainly due to skipjack, yellowfin tuna and miscellaneous small pelagics*. The ICCAT quota in force on yellowfin tuna has direct influence on the total first sales, which explains the fact behind its decrease. This reduction was mainly concentrated in the port of Bermeo in the Basque Country, an important place of sale of frozen yellowfin tuna in Spain. The average price of yellowfin decreased by 11%, hitting 1,69 EUR/kg.

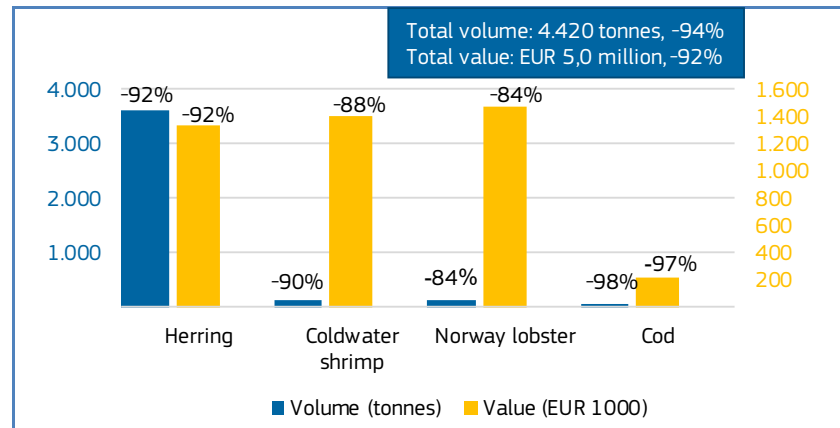
Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, SEPTEMBER 2019**



Percentages show change from the previous year.
Source: EUMOFA (updated 17.11.2019).

 In **Sweden** in **January–September 2019**, first sales decreased in value (-60%) and volume (-49%), compared to the same period in 2018, mainly due to herring, coldwater shrimp, Norway lobster, and sprat. In **September 2019**, both value and volume sharply decreased relative to September 2018, with the most dramatic decreases in first sales seen for herring, coldwater shrimp, Norway lobster, and mackerel. The average price of mackerel grew by 90% to 2,35 EUR/kg.

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, SEPTEMBER 2019**



Percentages show change from the previous year.
Source: EUMOFA (updated 17.11.2019).


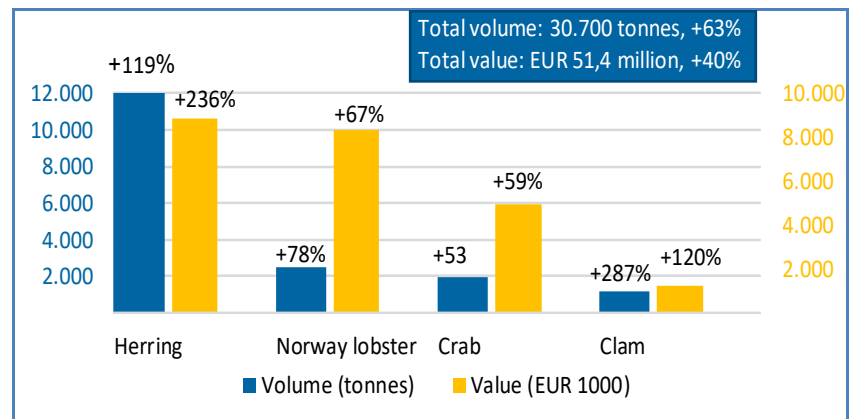
 In the **UK** in **January–September 2019**, first-sales value and volume increased by 30% and 14%, respectively, compared to the same period in 2018. The increases were mostly based on sales of Norway lobster, crab, mackerel, saithe, and haddock. In **September 2019**, the higher overall first-sales value and volume were due to a sharp increase in herring sales compared to September 2018. Amongst other key species, marked increases were recorded for Norway lobster, crab, clam, and haddock.

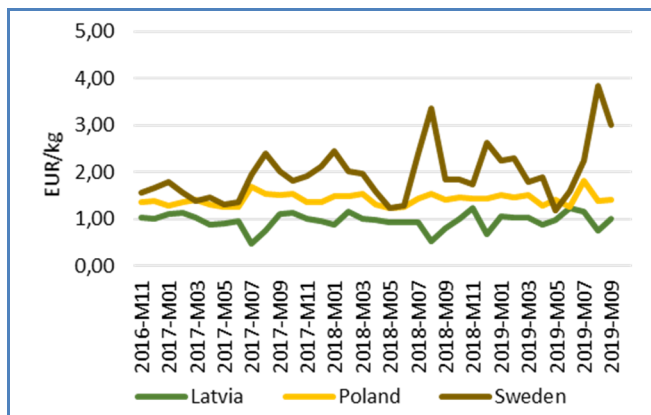
Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UK, SEPTEMBER 2019**



Percentages show change from the previous year.
Source: EUMOFA (updated 17.11.2019).

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

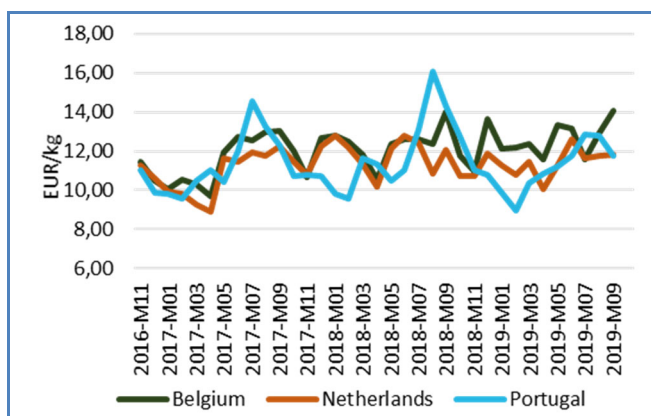
Figure 15. **FIRST-SALES PRICES OF COD IN LATVIA, POLAND, AND SWEDEN**



Source: EUMOFA (updated 17.11.2019).

First sales of **cod** occur in many European countries, including **Latvia, Poland, and Sweden**. The average first-sales prices in September 2019 (the most recent available data) reached 1,00 EUR/kg in Latvia, (up by 34% from August 2019 and 22% compared to September 2018). In Poland average first-sales prices, 1,41 EUR/kg, were slightly higher than the previous month, with an increase of 1%, and unchanged compared to September 2018. In Sweden, the average first-sales price was 3,02 EUR/kg in Sweden (which was down by 22% from the previous month and significantly up 64% from 2018). Cod prices in Latvia were stable but increased in Poland and Sweden over the observed period. Volume sold is seasonal and exhibited a decreasing trend, most notably in Latvia.

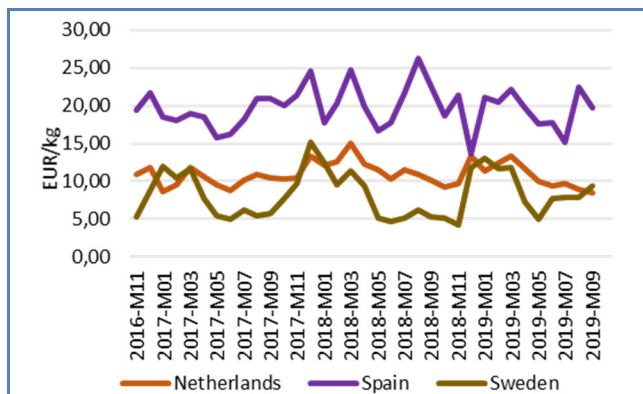
Figure 16. **FIRST-SALES PRICES OF COMMON SOLE IN BELGIUM, THE NETHERLANDS, AND PORTUGAL**



Source: EUMOFA (updated 17.11.2019).

The EU first sales of **common sole** take place in many countries, but most significant sales are in **Belgium, the Netherlands, and, to a lesser extent, in Portugal**. In September 2019, the average first-sales prices of sole were: 14,06 EUR/kg in Belgium (9% higher from August 2019 and unchanged compared to September 2018); 11,82 EUR/kg in the Netherlands (unchanged from the previous month and down by 2% from 2018); and 11,75 EUR/kg in Portugal (a decrease from both August 2019 and September 2018 by 8%, respectively). Common sole prices fluctuate considerably, especially in Portugal and they showed an increasing trend in all three countries. Price spikes correlate with a decrease in supply. First-sales volume is seasonal in the three markets with peaks in March (Belgium and the Netherlands) and in January (Portugal).

Figure 17. **FIRST-SALES PRICES OF TURBOT IN THE NETHERLANDS, SPAIN, AND SWEDEN**



Source: EUMOFA (updated 17.11.2019).

EU first sales of **turbot** take place in many European countries, most notably in the **Netherlands, and to a lesser extent in Spain and Sweden**. In September 2019, the average first-sales prices were: 8,48 EUR/kg in the Netherlands (down both from the previous month and a year earlier: by 5% and 16%, respectively); 19,79 EUR/kg in Spain (down by 12% from both August 2019 and September 2018); and 9,34 EUR/kg in Sweden (up by 18% from previous month and up by 78% from previous year). Overall prices remained stable in the Netherlands and Sweden, and increased slightly in Spain. While prices converge in the Netherlands and Sweden, they are considerably higher in Spain, where supply is limited. Volumes sold in first-sales markets are seasonal. In the Netherlands they peak in October, in Spain and Sweden the species is mainly sold in May.

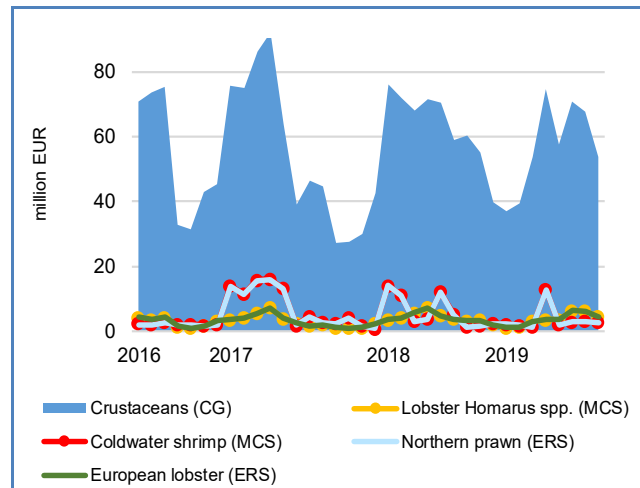
1.5. Commodity group of the month: Crustaceans

The 'Crustaceans' commodity group (CG³) ranked 3rd in value and 4th in volume among 10 CGs sold at the first-sales stage in September 2019⁴. First sales of these species reached EUR 53,9 million and 10.077 tonnes, decreasing by 24% in value and 16% in volume compared to September 2018. In the past 36 months, the highest value of crustaceans' first sales was registered in August 2017 reaching EUR 92,1 million.

The "Crustaceans" commodity group includes 12 of the main commercial species (MCS): crab, freshwater crayfish, lobster *Homarus* spp., Norway lobster, rock lobster and sea crawfish, shrimp *Crangon* spp., coldwater shrimps, deep-water rose shrimps, miscellaneous shrimps, warmwater shrimps, squillid and other crustaceans⁵.

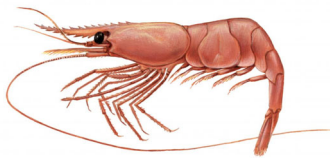
At Electronic Recording and Reporting System (ERS) level, Northern prawn (8%) and European lobster (5%) together made up 13% of total reported first-sales value of this commodity group in September 2019.

Figure 18. **FIRST-SALES VALUE COMPARISON AT CG AND ERS LEVEL FOR REPORTING COUNTRIES***



*Norway excluded from the analyses.
Source: EUMOFA (updated 17.11.2019).

1.6. Focus on Northern prawn



Northern prawn (*Pandalus borealis*) is a species of caridean shrimp found in cold parts of the northern Atlantic and northern Pacific Oceans. Its distribution ranges from New England in the United States, Canada's eastern coast, Greenland, Iceland, Svalbard, Norway and the North Sea as far south as the English Channel. In Atlantic waters, it is one of three recognised species of *Pandalus* that overlap geographically and bathymetrically but is the only one amongst these with a major commercial fishery. It lives on muddy substrates at depths of 20 to 1.330 m in waters with a temperature of 0 to 8 °C.

In their eight-year lifespan, males can reach a length of 120 mm, while females can reach 165 mm. The species is hermaphroditic, spawning once a year between September and October, and hatching in March and April⁶. Large fluctuations in catches and stock size are the main characteristic of this fishery. Stock size largely depends on the annual hydrographic variability in the area, and trends in abundance of predator species, especially cod, haddock and redfish⁷.

The prawns are caught both inshore and offshore using trawler nets. In the EU, the main fishing countries are Denmark, Sweden, the Netherlands and the UK. Management measures include Total Allowable Catches (TAC), which are decided on annual basis⁸.

The species are sold cooked with the shell on or cooked and peeled before being instantly frozen. Cooked and peeled prawns are also available in brine, or with modified air packaging.

³ Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

⁴ More data on commodity groups can be found in Table 1.2 in the Annex.

⁵ *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

⁶ <https://www.sealifebase.se/summary/Pandalus-borealis.html>

⁷ The N. Shrimp Offshore Fishery in the Northeast At. <https://www.sciencedirect.com/science/article/pii/S0065288106520024>

⁸ COUNCIL REGULATION (EU) 2019/124 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R0124&from=EN>

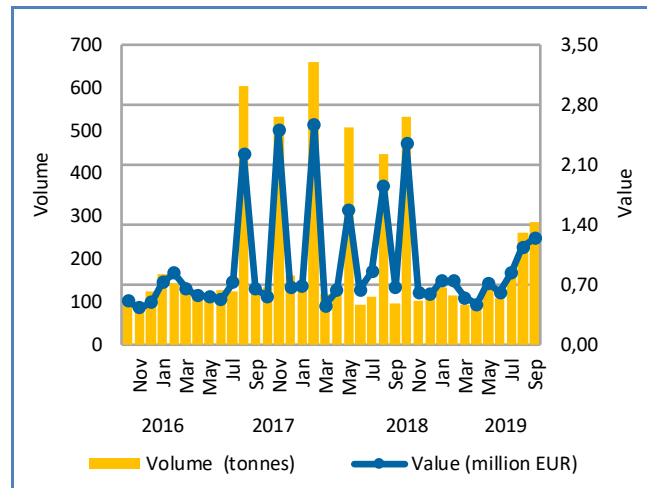
Selected countries

In **Denmark** in January–September 2019, the first sales of Northern prawn decreased by 29% in value and 40% in volume compared to the same period in 2018. Compared with January–September 2017, first-sales value and volume were lower by 6% and 17%, respectively.

Of crustacean species sold at first-sales stage in September 2019, Northern prawn accounted for 22% of the total first-sales value and 27% of first-sales volume.

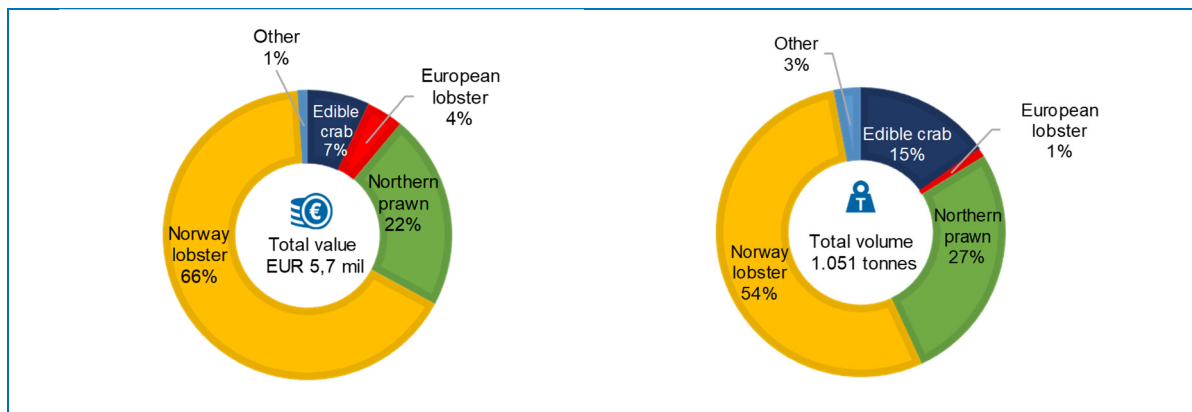
Skagen, Hirtshals, Østerby, and Hanstholm in the North Sea are the ports where all first sales occurred in January–September 2019.

Figure 19. **NORTHERN PRAWN: FIRST SALES IN DENMARK**



Source: EUMOFA (updated 17.11.2019).

Figure 20. **FIRST SALES: COMPARISON OF CRUSTACEANS (ERS) IN DENMARK, VALUE AND VOLUME, SEPTEMBER 2019**



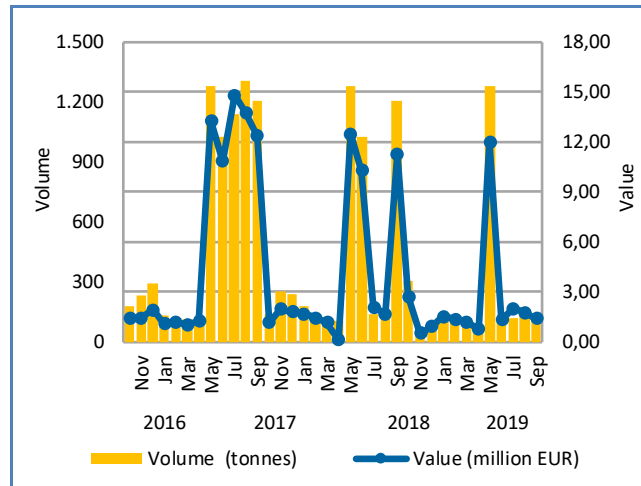
Source: EUMOFA (updated 17.11.2019).

In **Sweden** in January–September 2019, the first sales of Northern prawn decreased by 45% in value and 50% in volume relative to January–September 2018. Compared with the same period in 2017, first-sales value and volume sharply decreased by 67% and 66%, respectively.

Of crustacean species sold in September 2019, Northern prawn comprised 47% of total first-sales value and 46% of volume.

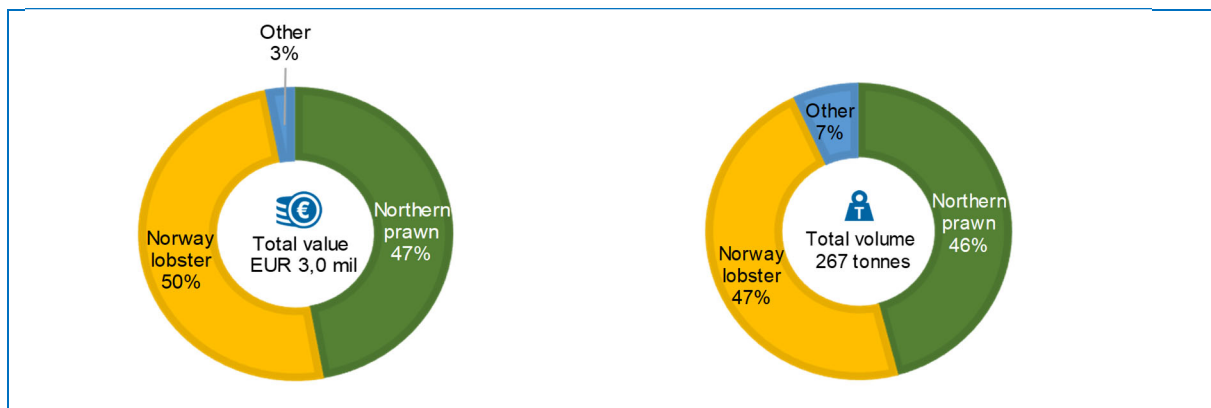
Smögen, in the North Sea, is the fishing port where 67% of first sales occurred during the first nine months of 2019.

Figure 21. **NORTHERN PRAWN: FIRST SALES IN SWEDEN**



Source: EUMOFA (updated 17.11.2019).

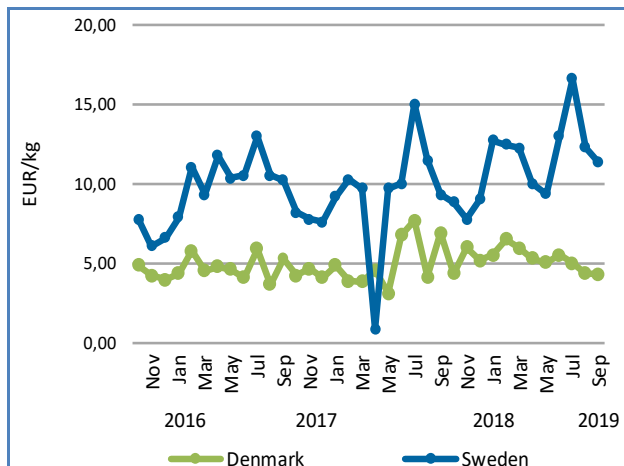
Figure 22. **FIRST SALES: COMPARISON OF CRUSTACEANS (ERS) IN SWEDEN, VALUE AND VOLUME, SEPTEMBER 2019**



Source: EUMOFA (updated 17.11.2019).

Price trends

Figure 23. **NORTHERN PRAWN: FIRST-SALES PRICE IN SELECTED COUNTRIES**



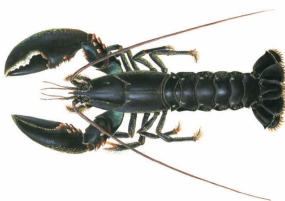
Source: EUMOFA (updated 17.11.2019).

In the observed 36-month period (October 2016–September 2019), the average price of Northern prawn in Sweden (10,01 EUR/kg), was more than double (+102%) the price in Denmark (4,96 EUR/kg). The main reason behind the price difference is the fact that Danish sales are composed of fresh prawn produce which is, in general, of lower value, whereas Sweden first sales are comprised of mainly cooked prawns, which reach a higher first-sales market price.

In **Denmark** in September 2019, the average first-sales price of Northern prawn (4,35 EUR/kg) significantly decreased (by 37%) compared to September 2018, but only by 18% when compared to the same month in 2017. During the past 36 months, the lowest price was recorded in May 2018 at 3,11 EUR/kg for about 505 tonnes, whereas the highest price at 7,68 EUR/kg for 110 tonnes was recorded in July 2018. The Northern prawn fishery fluctuates throughout the year, depending on weather conditions and fishing opportunities (Total Allowable Catch, TAC).

In **Sweden**, the average price of Northern prawn was 11,37 EUR/kg in September 2019, 22% higher than the price in September 2018, and 11% greater than the price in September 2017. Over the past 36 months, prices were the highest during the summer when catches were lower, and demand stayed high. Prices reached a peak in July 2019 when 119 tonnes of Northern prawn were sold at the average price of 16,60 EUR/kg. High fishery season is from May to September, when catches are usually most intense. Low fishery season is during winter, which is likely due to weather conditions.

1.7. Focus on European lobster



European lobster or common lobster (*Homarus gammarus*) is a species of clawed lobster found in the eastern Atlantic Ocean, Mediterranean Sea and parts of the Black Sea. It is one of the most valued seafoods in the world and has a global market. European lobster can grow up to 1 m in length, although 60 cm is more common, and European lobster may live for 20 to 50 years. Adults live on the continental shelf at depths up to 150 m, although not normally deeper than 50 m. Spawning occurs in the summer, and eggs are carried by the females for up to a year before hatching into planktonic larvae⁹.

The species is widely caught using lobster pots, and to a lesser extent as bycatch by bottom trawlers, mostly around the British Isles. The main fishing countries in the EU are the United Kingdom (the main producer), followed by France, Ireland, the

⁹ <http://www.bim.ie/media/bim/content/downloads/BIM,Lobster,Handling,and,Quality,Guide.pdf>

Netherlands, and Denmark. In the EU, European lobster is managed with the minimum landing size (MLS) of 87 mm carapace length (in the age of 4 and 8 years old)¹⁰. Next to MLS, most management measures are implemented at the regional level: fishing licenses, fishing closures, fishing areas and limits on the number of pots set out vessels¹¹. European lobster is traded live, frozen (raw or cooked, whole or tail) and, to a lesser extent, processed (soup, bisque).

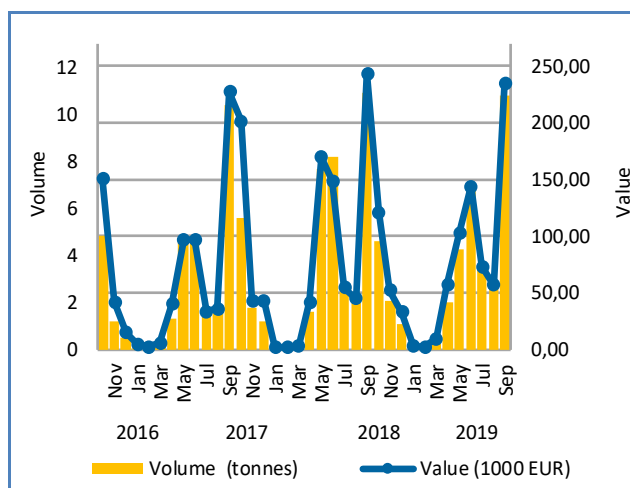
Selected countries

In **Denmark** in January–September 2019, first sales of European lobster slightly decreased by 4% in value and by 7% in volume compared to the same period in 2018. Compared with January–September 2017, first-sales value and volume were higher by 26% and 24%, respectively.

Of crustacean species sold in September 2019, European lobster comprised 4% of total first-sales value and 1% of volume (cf. figure 20).

Thyborøn, Oddesund Nord, and Glyngøre in the North Sea are the fishing ports with the highest registered first-sales value in Denmark from January to September 2019.

Figure 24. EUROPEAN LOBSTER: FIRST SALES IN DENMARK



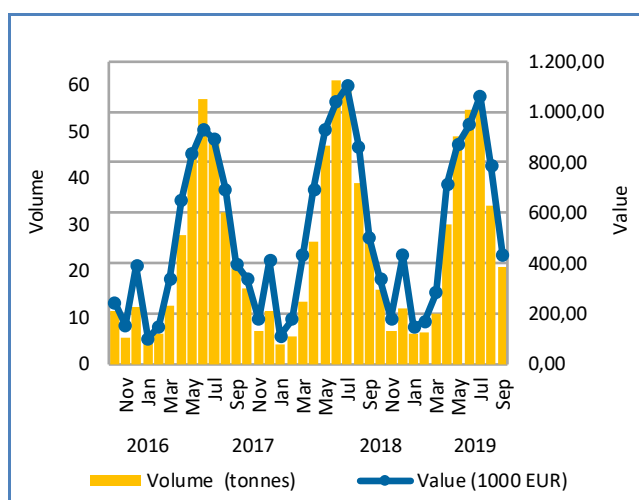
Source: EUMOFA (updated 17.11.2019).

In **France** in January–September 2019, first sales of European lobster decreased by 8% in value and 5% in volume compared to the same period in 2018. Compared to 2017, the trend was reversed as first sales grew by 9% in value, and by 5% in volume.

Among crustacean species sold, European lobster accounted for 17% of first-sales value and 8% of volume in September 2019.

Granville, Saint-Quay-Portrieux and Noirmoutier-en-l'Île are the French fishing ports with the highest first sales of European lobster in January–September 2019.

Figure 25. EUROPEAN LOBSTER: FIRST SALES IN FRANCE

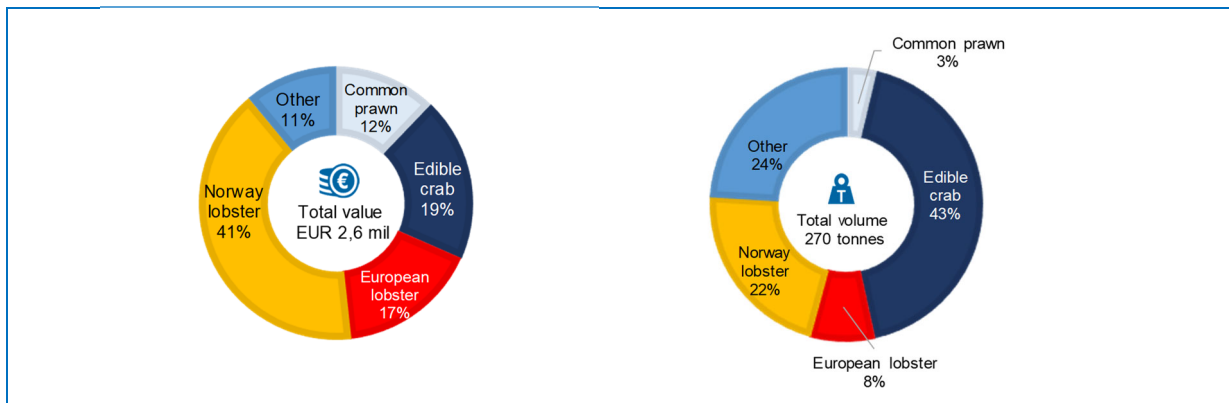


Source: EUMOFA (updated 17.11.2019).

¹⁰ COUNCIL REGULATION (EC) No 850/98 <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:31998R0850&from=EN>

¹¹ http://www.pdm-seafoodmag.com/guide/crustaceans/details/product/Homard_europ%C3%A9en.html

Figure 26. **FIRST SALES: COMPARISON OF CRUSTACEANS (ERS) IN FRANCE, VALUE AND VOLUME, SEPTEMBER 2019**



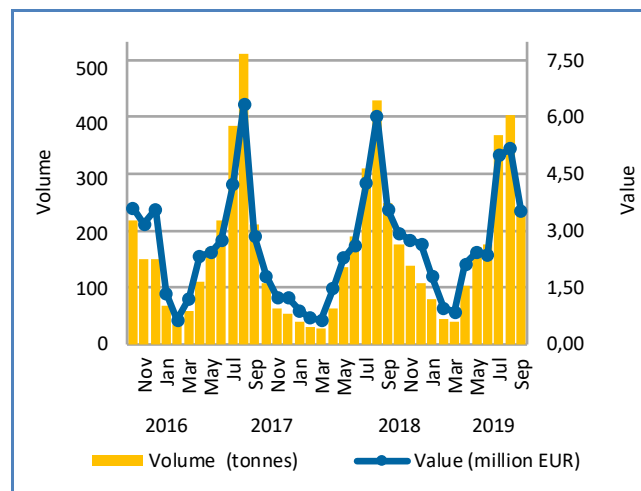
Source: EUMOFA (updated 17.11.2019).

In the **UK** in January–September 2019, first sales of European lobster increased by 8% in value and 9% in volume in comparison to January–September 2018. Compared with the same period in 2017, first-sales value remained stable, whereas volume fell by 9%. The European lobster fishery is seasonal, with highest sales during the summer, and low sales in winter and early autumn.

Of crustacean species sold in September 2019, European lobster comprised 21% of total first-sales value and 5% of volume.

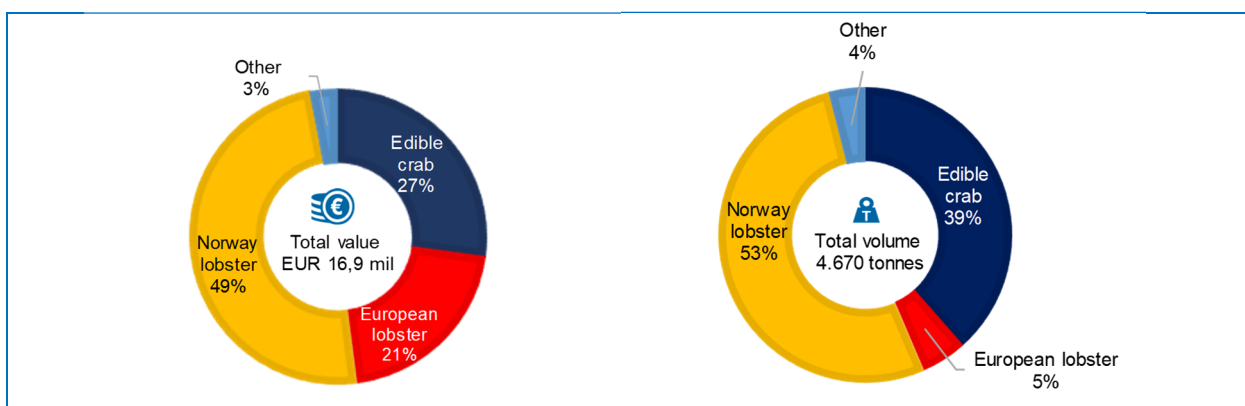
Bridlington, Scarborough, and Whitby were the fishing ports in the North Sea with highest first sales activities during the first nine months of 2019.

Figure 27. **EUROPEAN LOBSTER: FIRST SALES IN THE UK**



Source: EUMOFA (updated 17.11.2019).

Figure 28. **FIRST SALES: COMPARISON OF CRUSTACEANS (ERS) IN THE UK, VALUE AND VOLUME, SEPTEMBER 2019**



Source: EUMOFA (updated 17.11.2019).

Price trends

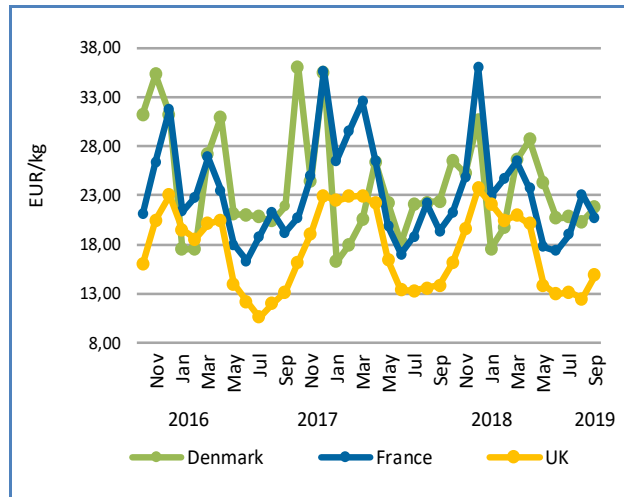
Over the past 36 months (October 2016–September 2019), the highest average price of European lobster among the selected countries was recorded in Denmark (23,97 EUR/kg), 3% higher than in France (23,29 EUR/kg), and 37% over that in the UK (17,48 EUR/kg).

In **Denmark** in September 2019, the price at 21,78 EUR/kg was 3% lower than in September 2018, and 1% less compared to September 2017. The highest price was observed in October 2017 at 36,04 EUR/kg for 6 tonnes, whereas the lowest was recorded in January 2018 at 16,22 EUR/kg for 135 kg. A peak season for the European lobster fishery was in September each year when first-sales volume was the highest with the average price at about 22,00 EUR/kg.

In **France** in September 2019, the average price of European lobster was 20,71 EUR/kg, representing an increase of 7% compared to September 2018, and 8% compared to September 2017. In the observed period, the peak season for the European lobster fishery was in June and July. The highest price was recorded in December 2018 at 36,03 EUR/kg for 12 tonnes, whereas the lowest was in June 2017 at 16,33 EUR/kg for 57 tonnes. Price fluctuated in line with supply, i.e. the lowest prices occurred in summer when catches were high, while the highest prices were in winter when catches were low.

In the **UK**, the average price of European lobster in September 2019 was 14,86 EUR/kg, 8% greater than the price in September 2018, and 13% greater than that in September 2017. Over the past 36 months, first-sales prices were the highest in winter, with a peak in December 2018 at 23,67 EUR/kg for 111 tonnes. The lowest price at 10,57 EUR/kg for 397 tonnes was observed in July 2017. The price trends are in line with supply, which, generally, is high in summer but low in winter.

Figure 29. **EUROPEAN LOBSTER: FIRST-SALES PRICE IN SELECTED COUNTRIES**



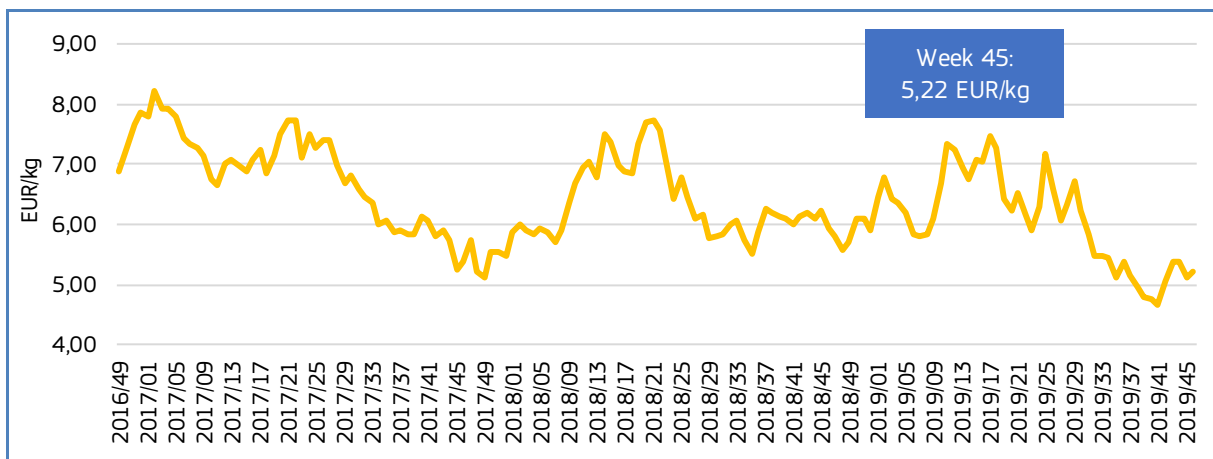
Source: EUMOFA (updated 17.11.2019).

2. Extra-EU imports

Each month, weekly extra-EU import prices (average unit values per week, in EUR per kg) are examined for nine species. Three species, which are the most relevant in terms of value and volume, are examined every month: frozen Alaska pollock fillets from China, fresh whole Atlantic salmon from Norway, and frozen tropical shrimp (genus *Penaeus*) from Ecuador. The other six species change every month: three are from the commodity group of the month (in this issue, 'crustaceans'), and this month they are frozen crabs from Norway, live lobsters from the USA, and frozen sea crawfish tails from the Bahamas. The remaining three species are randomly selected, and this month are: prepared or preserved herring from Norway, frozen surimi from Alaska pollock from the USA, and frozen surimi of other fish from Vietnam.

The weekly price of **fresh whole Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway** reached 5,22 EUR/kg in **week 45** (commencing on 4th November). This price remained almost unchanged from the preceding four-week average of 5,23 EUR/kg and was down by 12% from the price of 5,94 EUR/kg registered a year earlier (2018/45). At the same time, the price was 2% higher than the previous week, corresponding to a 9% decrease in volume from week 44. Imports in week 45 totalled 13.205 tonnes, a decrease of 12% from the average during the previous four weeks, and down by 8% from a year earlier.

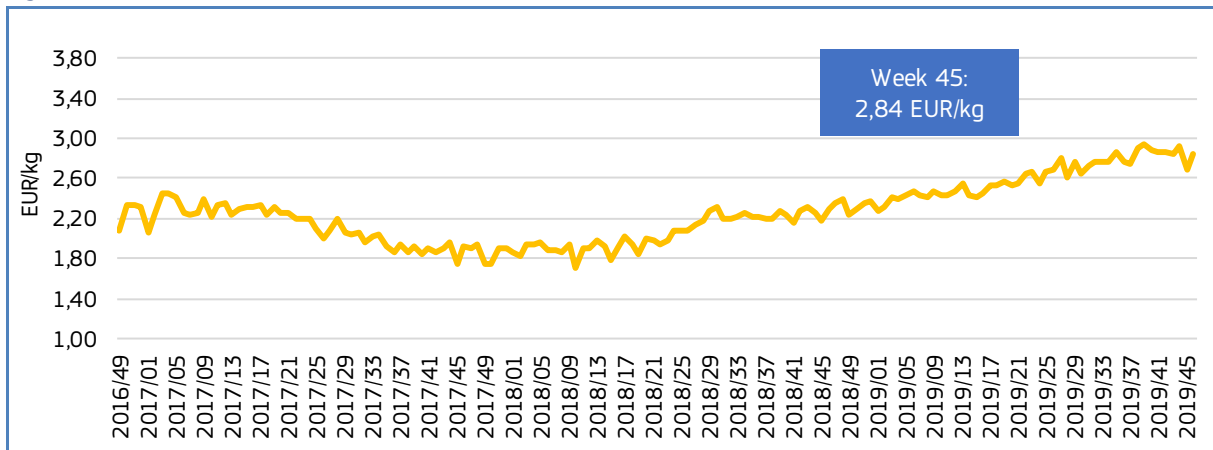
Figure 30. **IMPORT PRICE OF ATLANTIC SALMON, FRESH AND WHOLE FROM NORWAY**



Source: European Commission (updated 17.11.2019).

For **frozen fillets of Alaska pollock** (*Theragra chalcogramma*, CN code 03047500) imported from **China**, the price in **week 45** was 2,84 EUR/kg, almost unchanged from the preceding four-week average of 2,83 EUR/kg; price was 24% higher than the price of 2,29 EUR/kg recorded in the same week of 2018. Volume totalled 4.446 tonnes, which was 31% up from the average of the previous four weeks and 42% higher than a year earlier (2018/45).

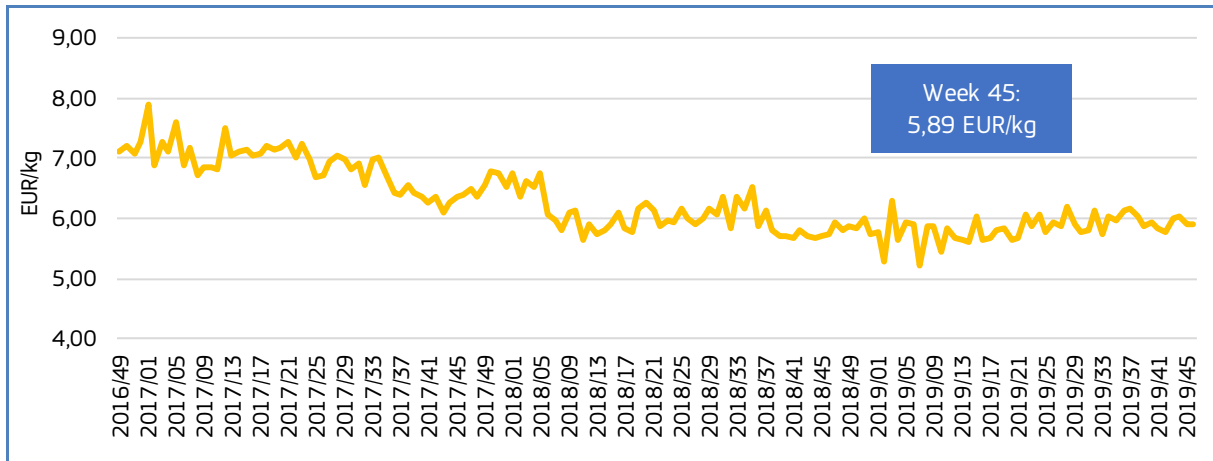
Figure 31. **IMPORT PRICE OF ALASKA POLLOCK, FROZEN FILLETS FROM CHINA**



Source: European Commission (updated 17.11.2019).

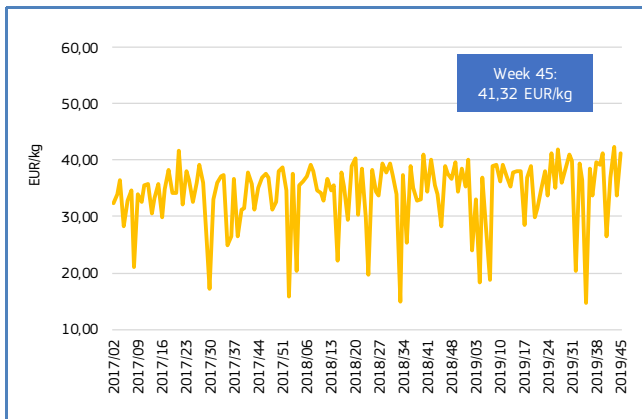
The price of **frozen tropical shrimp** (genus *Penaeus*, CN code 03061792) from **Ecuador** was 5,89 EUR/kg in **week 45**, almost unchanged from the average of 5,92 EUR/kg during the preceding four weeks and up by 3% from the same week in 2018. The volume in week 45 (2.811 tonnes) was significantly higher than the previous four-week average (+34%), although 7% lower compared with week 45 of the previous year. This product experienced high fluctuations in supply and the price has shown a decreasing trend for the past three years.

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



Source: European Commission (updated 17.11.2019).

Figure 33. **IMPORT PRICE OF FROZEN CRABS FROM NORWAY**

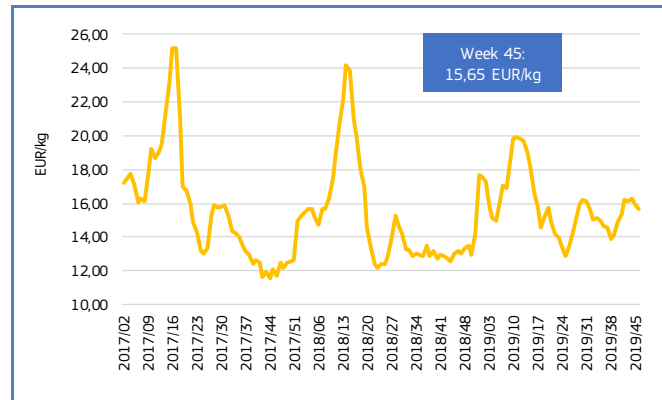


Source: European Commission (updated 17.11.2019).

The price of **frozen crabs** (*Paralithodes camchaticus*, *Chionoecetes* spp., *Callinectes sapidus*, CN code 03061410) imported from **Norway**, was 41,32 EUR/kg in **week 45**, 19% up from the preceding four-week average of 34,86 EUR/kg, and significantly higher (+46%) than the price of 28,35 EUR/kg in the same week in 2018. The product price has a high elasticity, not necessarily connected with supply. For example, the lowest price of 14,68 EUR/kg (2019/35) corresponds to an imported volume of 89,7 tonnes. The next lowest price of 14,89 EUR/kg (2019/33) corresponds to 3,6 tonnes of supply. The majority of prices are between 30-40 EUR/kg and have increased in the past 36 months. Volume was down 32% from the preceding four-week average; in week 45 of 2019 (10 tonnes) it doubled compared with week 45 of 2018. Denmark and Sweden are the biggest importers.

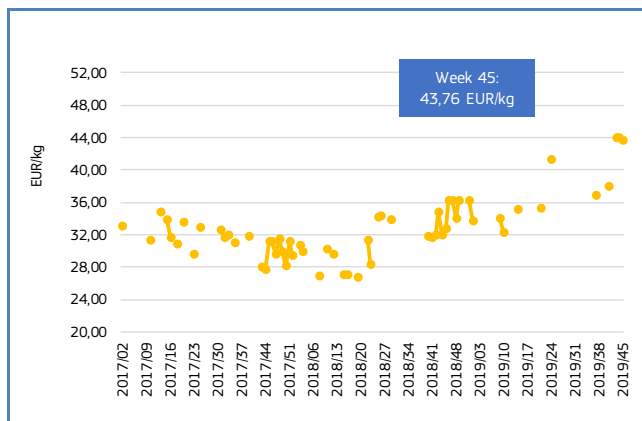
The price of **live lobsters** (*Homarus* spp., CN code 03063210) from the **USA** was 15,65 EUR/kg in **week 45**, up 19% from week 45 of 2018, and down by 3% from the four-week average of 2018 (16,16 EUR/kg). Prices oscillated from 12,00 EUR/kg to 25,00 EUR/kg and have experienced a decreasing trend (similar to volume) in the period observed (2017/1 – 2019/45). Prices tend to decrease to 12,00-15,00 EUR/kg in weeks 50 to 52 of the year, when the supply is at its highest. By contrast, prices increase to 20,00-25,00 EUR/kg in weeks 13 to 17, and do not exhibit a direct correlation with the highly variable supply. Italy and Spain are the biggest importers of live lobsters from the USA.

Figure 34. **IMPORT PRICE OF LIVE LOBSTERS FROM THE USA**



Source: European Commission (updated 17.11.2019).

Figure 35. **IMPORT PRICE OF FROZEN SEA CRAWFISH TAILS FROM THE BAHAMAS**

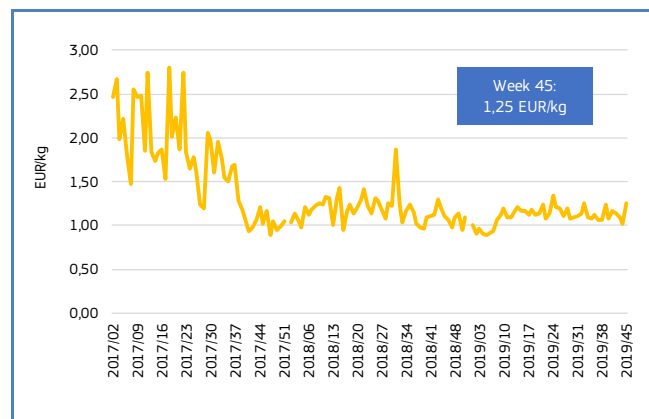


Source: European Commission (updated 17.11.2019).

For **frozen sea crawfish tails** (CN code 03061110) from the **Bahamas**, the price in **week 45** of 43,76 EUR/kg was 4% up from the preceding three-week average price of 42,04 EUR/kg, and was 33% higher than the price in week 45 of the previous year (32,78 EUR/kg). Crawfish fisheries are highly seasonal, and supply is at its greatest in the last weeks of October, November and December. The volume of 18 tonnes in week 45 was significantly lower than both the three-week average volume of 31 tonnes (-42%), and the volume of 38 tonnes a year earlier (-52%). Overall, prices have increased, corresponding to a reduction in supply. Belgium and France are the biggest importers in the EU.

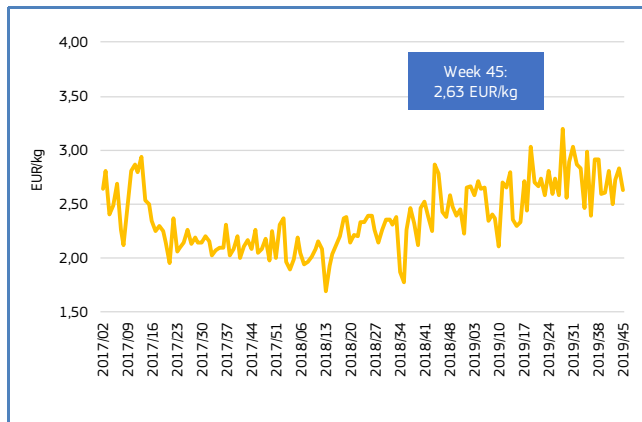
The price of **prepared or preserved herring**, whole or in pieces but not minced (CN code 16041299) from **Norway** was 1,25 EUR/kg in **week 45**, an increase of 13% from the previous four-week average of 1,11 EUR/kg, and 12% higher than the price in the same week of 2018. The recorded volume of 275 tonnes decreased significantly from both the volume of the preceding four weeks (-52%) and the year earlier (-47%). Prices have experienced a notable decrease while volume increased, albeit at a slower pace. The price peaks observed at the beginning of 2017 are generally not correlated with high imported volume. Sweden and Denmark are the biggest EU importers.

Figure 36. **IMPORT PRICE OF PREPARED OR PRESERVED HERRING FROM NORWAY**



Source: European Commission (updated 17.11.2019).

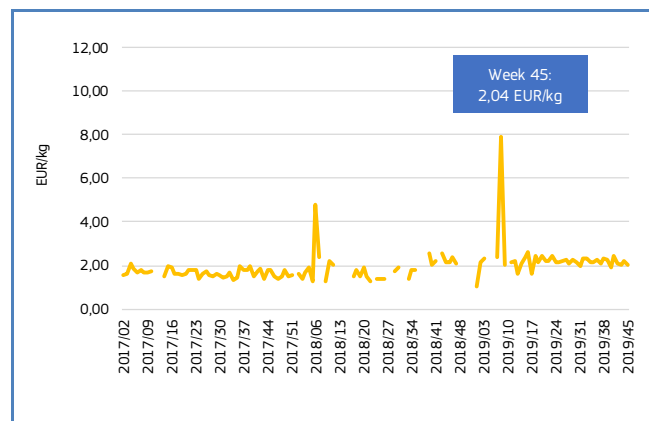
Figure 37. **IMPORT PRICE OF FROZEN SURIMI OF ALASKA POLLOCK FROM THE USA**



Source: European Commission (updated 17.11.2019).

The price of **frozen surimi of other fish** (CN code 03049910) from **Vietnam** reached 2,04 EUR/kg in **week 45**; this was 7% lower from the preceding four-week average of 2,19 EUR/kg and 5% lower than the price of 2,14 EUR/kg a year earlier. The recorded volume of 60,8 tonnes in week 45 was 13% lower than the preceding four-week average but 19% higher than in week 45 of 2018. The spikes observed in 2018/06 (4,80 EUR/kg) and 2019/08 (7,91 EUR/kg) correlate with lowest volumes of 7,5 and 10,8 tonnes, respectively. Prices experienced a moderate increase, while volumes showed an opposite trend. Lithuania and France are the biggest EU importers.

Figure 38. **IMPORT PRICE OF FROZEN SURIMI OF OTHER FISH FROM VIETNAM**



Source: European Commission (updated 17.11.2019).

The price of **frozen surimi from Alaska pollock** (*Theragra chalcogramma*, CN code 03049410) from the **USA** was 2,63 EUR/kg in **week 45**, lower than both the previous four-week average and week 45 of the previous year (-3% and -6%, respectively). The recorded volume of 718 tonnes was 26% higher than the preceding four weeks and up 28% from a year earlier. Both price and volume have shown increasing trends, the latter at a slower pace. The spikes in price (over 3,00 EUR/kg) in weeks 19, 28 and 31 of 2019 were not related to a shortage of supply, where volumes were 176, 524 and 208 tonnes, respectively. France and Spain are the biggest importers.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

Consumption of fresh fisheries and aquaculture products increased in both volume and value in the majority of the surveyed Member States in September 2019 compared to the same month a year ago. Only in France, Ireland, Italy and Poland did volume and value decrease. In Spain, volume decreased by 1%, but value increased by 3%. The decrease seen in Poland was mainly due to lower volume and value of mackerel (-17% and -7%, respectively). Reduced consumption of sardine (from 6.172 tonnes to 4.594 tonnes, or -26%) was the main reason for the decreased volume observed in Spain. A rise in European seabass volume and value (44% and 50%, respectively) contributed to the overall increase in consumption in the UK of 17% (557 tonnes) and 12% (EUR 6,03 million), respectively.

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

| Country | Per capita consumption 2016* (live weight equivalent, LWE) kg/capita/year | September 2017 | | September 2018 | | August 2019 | | September 2019 | | Change from September 2018 to September 2019 | |
|-------------|---|----------------|--------|----------------|--------|-------------|--------|----------------|--------|--|-------|
| | | Volume | Value | Volume | Value | Volume | Value | Volume | Value | Volume | Value |
| Denmark | 24,7 | 751 | 11,19 | 800 | 12,64 | 824 | 13,54 | 864 | 13,56 | 8% | 7% |
| France | 32,9 | 18.820 | 193,75 | 17.755 | 187,48 | 16.569 | 179,76 | 16.773 | 184,73 | 6% | 1% |
| Germany | 13,9 | 4.649 | 61,40 | 3.971 | 55,97 | 4.474 | 68,93 | 4.115 | 58,15 | 4% | 4% |
| Hungary | 5,2 | 277 | 1,48 | 242 | 1,28 | 261 | 1,43 | 326 | 1,70 | 35% | 33% |
| Ireland | 23,0 | 1.074 | 15,48 | 1.185 | 17,10 | 936 | 14,29 | 1.104 | 16,70 | 7% | 2% |
| Italy | 31,1 | 30.523 | 308,62 | 30.615 | 305,64 | 24.069 | 239,48 | 30.052 | 301,50 | 2% | 1% |
| Netherlands | 21,0 | 3.380 | 42,35 | 3.478 | 46,87 | 3.059 | 39,50 | 3.680 | 52,21 | 6% | 11% |
| Poland | 14,5 | 3.814 | 21,62 | 3.602 | 21,91 | 2.770 | 18,91 | 3.228 | 20,83 | 10% | 5% |
| Portugal | 57,0 | 4.607 | 29,64 | 4.197 | 27,89 | 5.954 | 37,01 | 4.638 | 29,95 | 11% | 7% |
| Spain | 45,7 | 54.930 | 415,97 | 47.469 | 357,06 | 42.914 | 333,35 | 46.973 | 368,98 | 1% | 3% |
| Sweden | 26,4 | 756 | 11,16 | 660 | 8,64 | 901 | 13,08 | 685 | 9,21 | 4% | 7% |
| UK | 23,7 | 3.164 | 50,01 | 3.270 | 52,49 | 4.521 | 68,74 | 3.827 | 58,53 | 17% | 12% |

Source: EUMOFA, based on Europanel (updated 20.11.2019).

*Data on per capita consumption of all fish and seafood products for all EU Member States can be found at: http://eumofa.eu/documents/20178/132648/EN_The+EU+fish+market+2018.pdf.

For the past three years, household consumption of fresh fisheries and aquaculture products in the month of September has been below the annual average in both volume and value in most of the Member States surveyed, except in Ireland, Italy and the Netherlands, where the opposite was observed. Portugal and Spain were the only Member States where value was above but volume below the annual average in this month. In Germany, on the contrary, volume was above but value below the average.

The most recent weekly consumption data (up to week 49 of 2019) is available via the EUMOFA website, and can be accessed [here](#).

The most recent monthly consumption data for October 2019 is available via the EUMOFA website, and can be accessed [here](#).

3.2. Fresh shrimp *Crangon* spp.

Habitat: *Crangon* spp. are part of the crustacean family Crangonidae, also known as brown or common shrimp. *Crangon* spp. live near the sea-bed in shallow estuarine waters or near the coast of marine or slightly brackish waters¹².

Catch area: Atlantic coast of Morocco, Black Sea, Mediterranean Sea, Baltic Sea, Atlantic coast of Europe from the White Sea to Portugal¹³.

Producing countries in the EU: Belgium, the Netherlands, Germany, Denmark, the UK.

Production method: Caught.

Main consumers in the EU: Belgium, the Netherlands, Germany, France¹⁴.

Presentation: Whole, peeled.

Preservation: Fresh, frozen.

Ways of preparation: Boiled, grilled.



3.2.1. General overview of household consumption in the Netherlands

In 2016¹⁵, per capita consumption of all fisheries and aquaculture products in the Netherlands was 21,0 kg, 14% lower than the average in the EU (24,3 kg). It remained unchanged compared to 2015. Compared to Portugal, where per capita consumption of 57,0 kg was the highest in the EU, in the Netherlands consumption was 63% lower. See more on per capita consumption in the EU in Table 3.

Over the period January 2016–September 2019, household consumption of shrimp *Crangon* spp. in the Netherlands increased while prices decreased. In 2018, volume increased by 17% and prices dropped by 7% compared to 2017. This was mainly due to higher supply of shrimp in the autumn months, particularly in September, caused by higher than usual temperatures during the summer of 2018. The high season for shrimp consumption in the Netherlands is the month of December.

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

First sales: Belgium (2/2019, 10/2017), Denmark (2/2019, 10/2017), France (10/2017), the Netherlands (2/2019), the UK (10/2017, 7/2016).

Consumption: the Netherlands (6/2017).

EU Trade: Intra-EU Export (11/2016).

Topic of the month: Brown shrimp in the Netherlands (Oct 2013).

¹² <https://eumofa.eu/documents/20178/142325/MH+2+2019+EN.pdf>

¹³ <http://www.fao.org/fishery/species/3435/en>

¹⁴ [http://www.europarl.europa.eu/RegData/etudes/etudes/join/2011/460041/IPOL-PECH_ET\(2011\)460041_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/etudes/join/2011/460041/IPOL-PECH_ET(2011)460041_EN.pdf)

¹⁵ 2016 is the most recent year that data are available.

3.2.2. Consumption trends in the Netherlands

Long-term trend, January 2016 to September 2019: Increasing in volume and decreasing in price.

Yearly average price: 38,78 EUR/kg (2016), 39,38 EUR/kg (2017), 36,55 EUR/kg (2018).

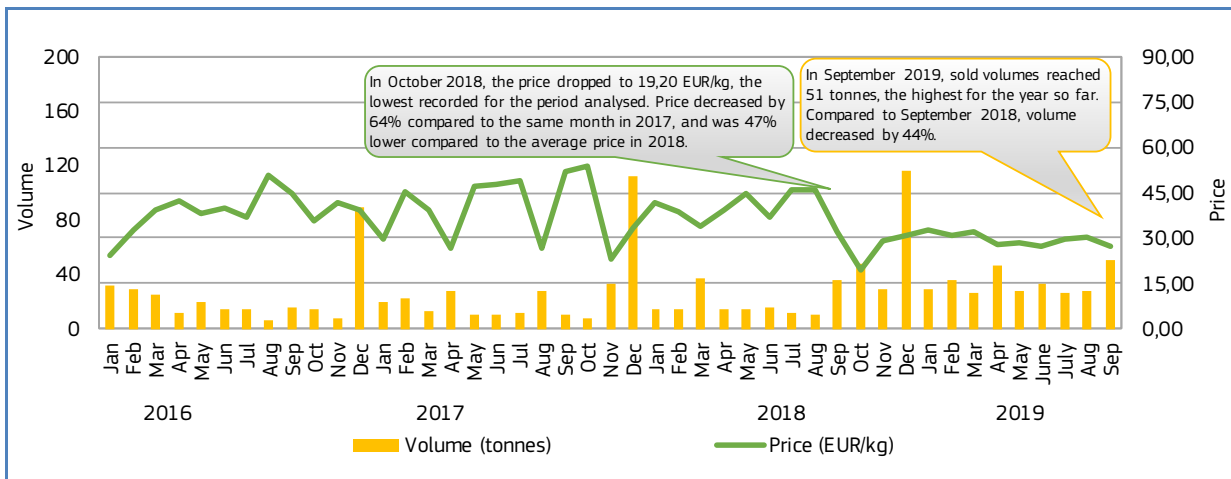
Yearly consumption: 282 tonnes (2016), 308 tonnes (2017), 360 tonnes (2018).

Short-term trend, January 2019 to September 2019: Decreasing volume and decreasing slightly in price.

Average price: 29,54 EUR/kg.

Consumption: 304 tonnes.

Figure 39. RETAIL PRICE AND VOLUME OF FRESH SHRIMP PURCHASED BY HOUSEHOLDS IN THE NETHERLANDS



Source: EUMOFA, based on Europanel (updated 20.11.2019).

4. Case study – Fisheries and aquaculture in Russia

4.1. Introduction

Russia is located in eastern Europe and northern Asia. It is the largest country in the world by area and has the 4th largest coastline in the world, the Baltic sea to the west, the Arctic Ocean to the north and the Pacific to the east. This also includes the coastline to the inland Black Sea, Caspian Sea and the Sea of Azov.

Russia is a large fishing nation with a total catch of 4,9 million tonnes in 2017. The country's aquaculture production was 187.000 tonnes in 2017, which was an all-time high¹⁶.

Russian commercial fisheries target over 170 half of the total wild catch in Russia is harvested its productive marine and freshwater

There are roughly 700 fishing companies worked in fisheries and aquaculture in 2017. fisheries, both inland and marine²⁰.

In 2014, Russia imposed an import ban on the USA and Canada. This was a response to

The Russian population is currently estimated to in recent decades and has been at about the



Source: World Factbook.

species of finfish and more than 100 invertebrate species¹⁷. Over in the Far East. This region has a low population and is known for ecosystems¹⁸.

operating in Russia¹⁹. It is estimated that nearly 314.000 people About 280.000 of those are estimated to be employed in

perishable foods such as fish, fruits and vegetables from the EU, economic sanctions against Russia over the Ukrainian conflict²¹.

be 145 million people. The population has not grown significantly same level since the early 1990s²².

Table 4. **CATCHES IN RUSSIA (volume in 1000 tonnes)**

| Species | 2000 | 2005 | 2010 | 2015 | 2016 | 2017 |
|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Fish | 3.778 | 3.060 | 3.919 | 4.286 | 4.536 | 4.633 |
| Crustaceans | 96 | 45 | 61 | 84 | 98 | 114 |
| Molluscs | 98 | 88 | 79 | 73 | 111 | 106 |
| Other | 56 | 14 | 17 | 20 | 29 | 25 |
| Total | 4.027 | 3.208 | 4.076 | 4.464 | 4.774 | 4.879 |

Source: FAO.

¹⁶ FAO.

¹⁷ <https://www.oceanoutcomes.org/areas-of-focus/russian-fisheries-seafood/>

¹⁸ See footnote 17.

¹⁹ See footnote 17.

²⁰ <http://www.fao.org/fishery/facp/RUS/en>

²¹ <https://www.intrafish.com/marketplace/russia-extends-seafood-import-ban-on-eu-until-2019/2-1-379620>

²² <https://www.worldometers.info/world-population/russia-population/>

4.2. Fisheries

The most important species in Russian fisheries include Alaska pollock, Pacific herring and Atlantic cod. Alaska pollock makes up the largest share of the landings and accounted for 36% of the total catch in Russia in 2017. From 2015 to 2017 the total catch volumes have increased by 9%²³.

Fisheries in the Northwest Pacific (East of Russia) accounted for 64% of the total catch volumes in 2017, with Alaska pollock, Pacific herring and pink salmon as the most important species by volume. The Northeast Atlantic (west Russia) accounted for 23% of total catch, with Atlantic cod, blue whiting and Atlantic mackerel as the most important species.

Russia had a catch of approximately 90.000 tonnes from the Mediterranean and Black Sea in 2017. In these waters the catch is dominated by European anchovy, European sprat, and Black and Caspian Sea sprat.

According to the Russian Ministry of Agriculture, catches in Russia exceeded 5 million tonnes in 2018, influenced by record high catches of Pacific salmon (676.000 tonnes)²⁴. The overall value of the fisheries industry grew by 10% from 2017 to 2018 and exceeded RUB 341 billion (EUR 4,6 billion).

In the first 10 months of 2019, Russian catches amounted to 4,25 million tonnes which is 90.000 tonnes lower than catches for the same period in 2018. The largest increase is seen for Alaska pollock (+84.000 tonnes) and herring (+44.000 tonnes) while catches of Pacific salmon (mainly pink salmon) dropped notably (-177.000 tonnes).

Climate change is causing a reduction in ice in the Arctic Ocean, which leads to new areas being open to fisheries and transportation²⁵. Estimates on when the Arctic ocean may be ice-free varies between 2030 and 2040²⁶. While the Russian government believes an ice-free Arctic ocean potentially gives new fishing opportunities, some scientists are concerned it could lead to Arctic species migrating to other areas, leaving the Arctic with less stock than today²⁷.

Table 5. **CATCHES IN RUSSIA, MAIN SPECIES (volume in 1000 tonnes)**

| Species | 2000 | 2005 | 2010 | 2015 | 2016 | 2017 |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Alaska pollock | 1.215 | 962 | 1.585 | 1.624 | 1.738 | 1.735 |
| Pacific herring | 361 | 205 | 222 | 387 | 404 | 426 |
| Atlantic cod | 171 | 204 | 273 | 386 | 399 | 401 |
| Pink salmon | 157 | 202 | 200 | 163 | 266 | 205 |
| Blue whiting | 242 | 332 | 128 | 186 | 174 | 188 |
| Atlantic mackerel | 51 | 41 | 59 | 155 | 151 | 169 |
| Atlantic herring | 174 | 140 | 209 | 67 | 74 | 113 |
| Haddock | 25 | 53 | 112 | 92 | 116 | 107 |
| Pacific cod | 68 | 56 | 81 | 79 | 88 | 102 |
| Other | 1.563 | 1.013 | 1.208 | 1.326 | 1.365 | 1.431 |
| Total | 4.027 | 3.208 | 4.076 | 4.464 | 4.774 | 4.879 |

Source: FAO.

²³ FAO.

²⁴ Minister of Agriculture of Russia, Dmitry Patrushev.

²⁵ <https://www.seafoodsource.com/features/can-russias-arctic-deliver-on-big-fishing-promises>

²⁶ See footnote 25.

²⁷ See footnote 27.

4.3. Aquaculture

In 2017, Russia's aquaculture production reached 187.000 tonnes, of which 163.000 tonnes was in freshwater (according to FAO data). When the production of smolts and fries are included, this brings the 2017 total to 219.700 tonnes (according to the Russian Federal Agency for Fisheries). Since 2000, the aquaculture production in Russia has doubled in volume and there is larger variety in the species cultivated. The most common species produced are carp and silver carp, which together account for 55% of the total production.

In 2018, the volume of aquaculture production amounted to 239.000 tonnes. 145.000 tonnes of carp (common carp, silver carp and grass carp) and 67.000 tonnes of salmonids (rainbow trout and Atlantic salmon) contribute to this figure. The majority of the rainbow trout produced in Russia is farmed in the Karelia region (27.000 tonnes)²⁸. The development strategy for the aquaculture industry aims to increase aquaculture production three-fold, seeking to reach 600.000 tonnes by 2030²⁹. It is expected that production of salmonids will reach 185.000 tonnes in the same period.

According to preliminary data, in the first three quarters of 2019, aquaculture production was 203.000 tonnes³⁰, of which production of marketable fish amounted to 175.000 tonnes. The main species produced in the first three quarters were carp (75.000 tonnes), salmonids (60.000 tonnes), scallops (11.000 tonnes), oysters (2.600 tonnes) and sturgeons (2.500 tonnes).

The increase in aquaculture production is largely related to government support measures for the industry, investors and new industry players that have attained permission to use new areas for production (through auctions)³¹.

Table 6. **AQUACULTURE PRODUCTION IN RUSSIA (volume in 1000 tonnes)**

| Species | 2000 | 2005 | 2010 | 2015 | 2016 | 2017 |
|-----------------|-----------|------------|------------|------------|------------|------------|
| Common carp | 34 | 54 | 57 | 58 | 62 | 65 |
| Silver carp | 24 | 29 | 12 | 23 | 39 | 40 |
| Rainbow trout | 4 | 9 | 19 | 24 | 29 | 34 |
| Atlantic salmon | 0 | 0 | 5 | 11 | 13 | 13 |
| Grass carp | 0 | 4 | 13 | 18 | 6 | 8 |
| Cyprinids | 5 | 10 | 7 | 5 | 6 | 6 |
| Yesso scallop | 0 | 0 | 1 | 2 | 4 | 5 |
| Sturgeons | 2 | 2 | 2 | 4 | 3 | 3 |
| Other | 21 | 6 | 6 | 9 | 13 | 13 |
| Total | 90 | 115 | 121 | 154 | 174 | 187 |

Source: FAO.

4.4. Processing

Large volumes of fish caught are exported to other countries for processing and then re-imported to Russia³². Historically, frozen gutted and whole produce has accounted for about 70% of production³³. Russia now aims to increase the share of

²⁸ Federal Agency for Fisheries of Russia.

²⁹ <http://www.fish.gov.ru/press-tsentr/novosti/28792-proizvodstvo-produktsii-akvakultury-za-9-mesyatsev-vyroslo-pochti-na-36-do-203-tys-tonn>

³⁰ See footnote 29.

³¹ See footnote 29.

³² <http://iii.infofish.org/index.php/industrial-profile-3-2019>

³³ See footnote 32.

products undergoing processing within the country to add value. To achieve this, a change in the structure of domestic production is needed.

Many of the processing plants are located far from the coast, and a lack of adequate infrastructure makes the exploitation of production capacity difficult³⁴. Before the embargo on imports, Russian processing enterprises mainly focused on imported raw materials.

The government has introduced financial support for reaching investment goals, especially for constructing new high-tech fishing vessels and processing plants in coastal regions. Due to vessel and processing plant developments, the share of high value products produced in Russia is expected to increase from 30% (today) to 54% by 2025, and 65% by 2030³⁵.

4.5. Trade

Russian imports of food and aquaculture products (FAP)

In August 2014, the Russian President signed a decree that prohibited the import of certain agricultural products, raw materials and foodstuffs originating from certain countries – among them, the European Union – for one year. This was a response to economic sanctions against Russia over the Ukrainian conflict³⁶. Since then, the embargo has been prolonged several times and is set to run until 31st December 2019.

Before the sanctions, the ratio of domestic vs imported fish products in stores in Russia was about 50:50. Now, the share of Russian seafood has increased to 80–85%³⁷. Russia imported 608.000 tonnes of seafood in 2018 with a value of nearly EUR 1,9 billion. Major import products are salmon (from Chile and the Faroe Islands), herring (from the Faroe Islands), mackerel (from the Faroe Islands, Greenland and China), and shrimp (from India, China and Argentina).

In 2013, before the import embargo, Russia imported about 1,07 million tonnes of seafood, of which 56% originated from countries that are now banned. The largest trade partners before the ban, Norway and Iceland, together accounted for 36% of total imports in 2013. To compensate for the decrease in imports after the embargo, Russia has increased its domestic production as well as finding new trade partners. The Faroe Islands and Greenland have especially become more important as trade partners for Russia after the ban. Imports from China and Chile are at the same level as before the ban.

Table 7. **IMPORT INTO RUSSIA, BY SPECIES (volume in 1000 tonnes, value in million EUR)**

| Species | 2013 | | 2016 | | 2017 | | 2018 | |
|------------------------------|--------------|--------------|------------|--------------|------------|--------------|------------|--------------|
| | Volume | Value | Volume | Value | Volume | Value | Volume | Value |
| Salmon | 156 | 699 | 66 | 391 | 63 | 427 | 82 | 521 |
| Herring | 134 | 149 | 52 | 86 | 76 | 111 | 77 | 88 |
| Mackerel | 103 | 155 | 77 | 103 | 96 | 131 | 61 | 84 |
| Shrimp, miscellaneous | 34 | 185 | 25 | 159 | 29 | 179 | 35 | 202 |
| Miscellaneous small pelagics | 108 | 70 | 16 | 17 | 23 | 25 | 25 | 26 |
| Other | 532 | 1 211 | 295 | 751 | 338 | 878 | 328 | 961 |
| Total | 1.066 | 2.469 | 532 | 1.506 | 624 | 1.751 | 608 | 1.882 |

Source: EUMOFA.

³⁴ <http://ii.infofish.org/index.php/industrial-profile-3-2019>

³⁵ See footnote 34.

³⁶ <https://www.intrafish.com/marketplace/russia-extends-seafood-import-ban-on-eu-until-2019/2-1-379620>

³⁷ See footnote 37.

Table 8. **IMPORT INTO RUSSIA, BY COUNTRY (volume in 1000 tonnes, value in million EUR)**

| Country | 2013 | | 2016 | | 2017 | | 2018 | |
|---------------|--------------|--------------|------------|--------------|------------|--------------|------------|--------------|
| | Volume | Value | Volume | Value | Volume | Value | Volume | Value |
| Faroe Islands | 66 | 83 | 111 | 254 | 159 | 327 | 140 | 284 |
| China | 96 | 253 | 102 | 258 | 110 | 276 | 98 | 316 |
| Chile | 62 | 235 | 60 | 309 | 54 | 309 | 79 | 418 |
| Belarus | 32 | 118 | 62 | 201 | 75 | 257 | 77 | 251 |
| Greenland | 0 | 1 | 31 | 68 | 37 | 84 | 27 | 60 |
| Other | 809 | 1.778 | 167 | 415 | 188 | 498 | 187 | 551 |
| Total | 1.066 | 2.469 | 532 | 1.506 | 624 | 1.751 | 608 | 1.882 |

Source: EUMOFA.

Russian exports of FAP

Russia exported nearly 1,9 million tonnes in 2018 with a value of EUR 3,8 billion. The volume is mainly exported to China and South Korea. Exports to China mostly consist of Alaska pollock, herring and other salmonids. To South Korea, the exports consist mainly of Alaska pollock, crab and cod. The Russian exports to the Netherlands are mainly cod and haddock.

Table 9. **EXPORT FROM RUSSIA, BY SPECIES (volume in 1000 tonnes, value in million EUR)**

| Species | 2013 | | 2016 | | 2017 | | 2018 | |
|----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | Volume | Value | Volume | Value | Volume | Value | Volume | Value |
| Alaska pollock | 822 | 785 | 839 | 830 | 856 | 740 | 783 | 750 |
| Herring | 259 | 153 | 102 | 69 | 203 | 111 | 228 | 111 |
| Salmon | 117 | 252 | 140 | 343 | 87 | 240 | 204 | 502 |
| Cod | 107 | 239 | 129 | 369 | 175 | 541 | 151 | 487 |
| Crab | 28 | 214 | 52 | 530 | 64 | 737 | 70 | 931 |
| Other | 250 | 605 | 327 | 719 | 344 | 833 | 431 | 1 003 |
| Total | 1.583 | 2.248 | 1.590 | 2.860 | 1.729 | 3.203 | 1.868 | 3.784 |

Source: EUMOFA.

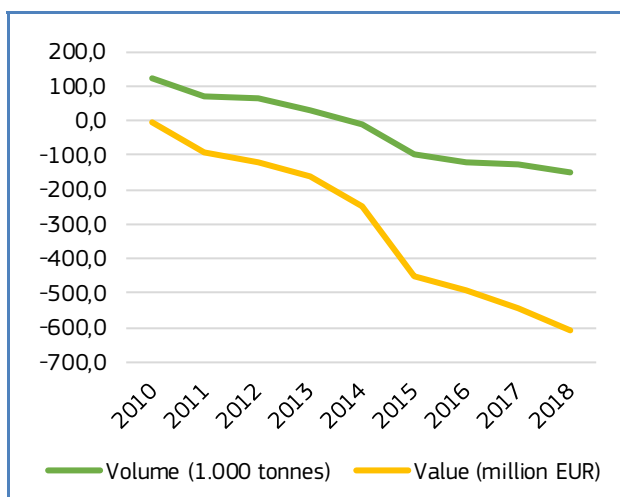
Table 10. **EXPORT FROM RUSSIA, BY COUNTRY (volume in 1.000 tonnes, value in million EUR)**

| Country | 2013 | | 2016 | | 2017 | | 2018 | |
|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | Volume | Value | Volume | Value | Volume | Value | Volume | Value |
| China | 842 | 799 | 859 | 980 | 959 | 998 | 1.056 | 1.311 |
| South Korea | 507 | 868 | 428 | 947 | 445 | 1.090 | 450 | 1.195 |
| Netherlands | 71 | 210 | 92 | 393 | 133 | 598 | 115 | 592 |
| Japan | 48 | 152 | 58 | 250 | 51 | 222 | 59 | 306 |
| Belarus | 37 | 47 | 42 | 55 | 43 | 63 | 41 | 70 |
| Other | 79 | 172 | 111 | 236 | 98 | 233 | 146 | 310 |
| Total | 1.583 | 2.248 | 1.590 | 2.860 | 1.729 | 3.203 | 1.868 | 3.784 |

Source: EUMOFA.

Trade balance between the EU and Russia

Figure 40. **BALANCE OF EU TRADE WITH RUSSIA**



Source: EUMOFA.

The Russian import embargo imposed in 2014 caused a strong imbalance in trade between the EU and Russia. The EU trade deficit with Russia rose sharply both in volume and value terms – with value decreasing the most due to embargo on high-value products, such as farmed Atlantic salmon. The EU trade deficit with Russia has continued to increase over the last three years.

EU exports to Russia

After the import embargo in 2014, the EU export volumes to Russia have fluctuated between 34.000 tonnes and 44.000 tonnes, a drop by more than 100.000 tonnes compared with the pre-embargo period. The volumes reportedly being exported from the EU Member States to Russia are either products originating from countries exempted from the import embargo or specific products that are exempted. Greenland is exempted from the Russian import embargo since it is a part of Denmark, but not the EU. It is likely that most of the EU exports to Russia are products originating from Greenland.

The main products recorded as EU exports to Russia in 2018 were mackerel, shrimp and miscellaneous small pelagics. Exports of important products from the EU before 2014 (like sprat, blue whiting, farmed Atlantic salmon and trout) have virtually stopped. The volumes previously exported to Russia are now mainly going to intra-EU markets.

Table 11. **EU EXPORTS TO RUSSIA (volume in 1000 tonnes, value in million EUR)**

| Species | 2013 | | 2016 | | 2017 | | 2018 | |
|------------------------------|------------|------------|-----------|-----------|-----------|------------|-----------|-----------|
| | Volume | Value | Volume | Value | Volume | Value | Volume | Value |
| Mackerel | 22 | 35 | 7 | 8 | 16 | 23 | 9 | 13 |
| Shrimp, coldwater | 6 | 21 | 7 | 34 | 9 | 43 | 8 | 32 |
| Miscellaneous small pelagics | 31 | 28 | 2 | 2 | 2 | 2 | 3 | 3 |
| Fishmeal | 6 | 9 | 1 | 2 | 1 | 1 | 1 | 2 |
| Fish oil | 0 | 2 | 1 | 4 | 1 | 3 | 1 | 4 |
| Redfish | 0 | 0 | 1 | 2 | 1 | 3 | 1 | 2 |
| Herring | 8 | 5 | 5 | 7 | 6 | 7 | 0 | 0 |
| Anchovy | 0 | 1 | 0 | 1 | 0 | 1 | 0 | 2 |
| Trout | 4 | 16 | 0 | 1 | 0 | 1 | 0 | 1 |
| Other | 83 | 110 | 9 | 21 | 8 | 22 | 12 | 23 |
| Total | 160 | 228 | 34 | 83 | 44 | 107 | 35 | 83 |

Source: EUMOFA.

EU imports from Russia

The EU imported 183.000 tonnes of fish and seafood from Russia in 2018. Cod, Alaska pollock and haddock accounted for 88% of total imports and 86% of total value. With very few exceptions, imports from Russia consisted of frozen products.

Most of the fisheries and aquaculture products imported by the EU from Russia enters the EU in the biggest European ports, in the Netherlands and Germany. These countries are the first points of entry, but the products can then be processed or consumed in other Member States.

Table 12. **EU IMPORTS FROM RUSSIA (volume in 1000 tonnes, value in million EUR)**

| Species | 2013 | | 2016 | | 2017 | | 2018 | |
|-----------------------|------------|------------|------------|------------|------------|------------|------------|------------|
| | Volume | Value | Volume | Value | Volume | Value | Volume | Value |
| Cod | 80 | 234 | 100 | 375 | 111 | 445 | 101 | 434 |
| Alaska pollock | 33 | 71 | 30 | 71 | 34 | 73 | 49 | 108 |
| Haddock | 9 | 34 | 12 | 48 | 13 | 47 | 12 | 52 |
| Other freshwater fish | 3 | 21 | 6 | 40 | 6 | 39 | 8 | 47 |
| Herring | 1 | 0 | 0 | 0 | 2 | 1 | 7 | 4 |
| Salmon | 2 | 13 | 0 | 1 | 2 | 15 | 1 | 8 |
| Plaice, European | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 3 |
| Redfish | 0 | 1 | 0 | 1 | 0 | 1 | 1 | 1 |
| Crab | 0 | 3 | 0 | 13 | 0 | 13 | 0 | 13 |
| Other | 3 | 10 | 4 | 25 | 3 | 16 | 3 | 18 |
| Total | 132 | 387 | 153 | 572 | 173 | 650 | 183 | 689 |

Source: EUMOFA.

4.6. Consumption

In 2014, Russia's per capita fish consumption reached 22,7 kg, but, since then, consumption has been in gradual decline³⁸. The decline is linked to sharp price increases, following changes in trade flows after the import ban, which have made fish and other seafood unaffordable for many people³⁹.

The Far Eastern part of Russia has the highest per capita consumption of seafood, as, historically, fish plays a major role in the local diet. In some areas in this region, the consumption is up to 60 kg per capita, while others it is around 34 kg. In Moscow, the annual fish consumption per capita reaches 30 kg, while in Saint-Petersburg it is approximately 18 kg⁴⁰.

Russians' interest in higher-end products has reduced since the embargo. The consumption of Atlantic salmon, for example, has decreased immensely. Today, the most popular fish among Russians is herring, one of the cheapest seafood products available with nearly 400.000 tonnes consumed in 2018. Following herring, the most popular seafood species are: cod, pollock, pink salmon and chum salmon⁴¹. The most popular product category is frozen fish, which accounts for 62% of the total fish production. It is followed by fresh or chilled fish, canned fish and preserved products⁴².

³⁸ Fishery sector overview 2017- Flanders investment and market study.

³⁹ <https://www.seafoodsource.com/features/high-prices-turning-russians-off-seafood>

⁴⁰ See footnote 38.

⁴¹ See footnote 39.

⁴² See footnote 38.

5. Case study – Abalone in the EU market

Abalone is one of the most expensive seafood items worldwide. As with other seafood⁴³, production has recently shifted from wild caught to farmed and, today, over 95% of abalone comes from aquaculture. China is by far the main market for abalone products, consuming about 90% of its domestic production as well as importing abalone products from other origins (Australia, the USA, etc.). In the EU, France is the main abalone producer in terms of both wild catch and aquaculture.

5.1. Biology, resources, and exploitation

Biology

Abalone is the common name for any of a group sea snails (gastropod molluscs) of the genus *Haliotis*. There are about 60 species of abalone over the world, which vary widely in size. The *Haliotis* genus has a worldwide distribution, along the coastal waters of almost every continent. The majority of abalone species are found in cold waters, including off the coasts of New Zealand, South Africa, Australia, Western North America, and Japan. Abalone grows slowly and feeds on seaweed.

The shells of abalone have a flat, open spiral structure, and several respiratory pores in a row near their outer edge. The thick inner layer of the shell is composed of nacre (also known as mother-of-pearl), which in many species is highly iridescent, giving rise to a range of strong, changeable colours, which make the shells valuable as decorative objects, jewellery, and suchlike.

The “ormer” abalone (*Haliotis tuberculata*) is found in EU waters. Adult ormers range from 8 to 14 cm, reached after five years, and the minimum landing size for those that are wild-caught is 9 cm. In the EU, the species is mostly found in the Channel, Brittany and Normandy (France) and in the Channel Islands⁴⁴.

Resource, exploitation, and management in the EU

Abalone species are harvested all over the world and are most often caught by diving or hand-collecting. In recent years, fisheries in countries catching abalone have shown similar trends, with landings (and illegal fishing) rapidly increasing, and then falling as stocks were overfished. Abalone farming has grown in several countries to compensate for the decrease of wild-caught supply⁴⁵.

Haliotis tuberculata is the only European abalone species that is commercially exploited. It is harvested by diving. In France, the fishery is regulated with a limited number of diving licenses and an annual quota. Catching abalone is permitted for recreational fisheries, but diving for abalone is forbidden. Both the commercial and recreational fisheries are subject to the minimum landing size (9 cm) and fishing closure during the spawning season (in summer).

Recreational fishing can be regionally significant (e.g. Tasmania in Australia, Brittany in France, etc.) and IUU fishing remains significant in certain regions where it is abundant despite quota systems being implemented⁴⁶.

Abalone farming began in the late 1950s and early 1960s in Japan and China. Rapid development of abalone cultivation took place in the 1990s, and it is now widespread in many countries including the USA, Mexico, South Africa, Australia, Japan, China, Taiwan, Ireland, Iceland, and others. Worldwide, there are over 15 species of abalone that are farmed, and commercially important. Abalone is farmed using many different culture methods⁴⁷, both on land and in the sea. These

⁴³ European seabass, gilthead seabream, turbot, etc.

⁴⁴ <https://doris.ffesmm.fr/Especies/Haliotis-tuberculata-tuberculata-Ormeau-437>

⁴⁵ <http://www.fishtech.com/ThailandSymposium1.pdf>

⁴⁶ <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/902588/>

⁴⁷ <http://www.fishtech.com/abaloneinfo.html>

include intensive culture (in land-based tanks, nets or in structures), and extensive culture (in artificially arranged substrate or structures where seeds are planted, with or without added food⁴⁸.

5.2. Wild-caught abalone fisheries

According to FAO statistics, world catches of *Haliotis* species amounted to 9.107 tonnes in 2017, down 37% from 2008, mostly attributable to reduced abundance of the main caught species (due to high fishing pressure and high illegal catches in some countries), often leading to the implementation of management measures. Overall, legal catches of abalone species have gradually decreased from the 20.000 tonnes yearly catches recorded in the 1970s. Explanations for the decline include overexploitation, illegal harvesting, disease, and habitat degradation⁴⁹.

In 2017, the leading producers were Australia (33% of the world production volume) and Chile (30%), and to a lesser extent Japan (11%) and New Zealand (9%). Inside the EU, France is the only producer, with 35 tonnes caught in 2017, consisting exclusively of ormer (*Haliotis tuberculata*).

During 2008–2017, all major producing countries have experienced decreasing abalone catches: -35% in Australia, -15% in Chile, -41% in Japan, -14% in New Zealand. Only South Africa experienced a significant increase (+46%). In France, catches have fluctuated, reaching a peak in 2011 at 49 tonnes, then averaging between 35 and 38 tonnes.

Table 13. **WORLD CATCHES OF ABALONE HALIOTIS SPP. (volume in tonnes)**

| Country | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|--------------|---------------|---------------|---------------|---------------|---------------|--------------|---------------|--------------|--------------|--------------|
| Australia | 4.713 | 4.961 | 4.083 | 4.276 | 4.014 | 3.829 | 3.596 | 3.363 | 3.095 | 3.041 |
| Chile | 3.210 | 3.641 | 3.009 | 2.255 | 2.252 | 2.067 | 2.250 | 2.395 | 2.361 | 2.717 |
| Japan | 1.687 | 1.855 | 1.461 | 1.259 | 1.266 | 1.395 | 1.363 | 1.302 | 1.136 | 1.000 |
| New Zealand | 932 | 979 | 1.115 | 967 | 891 | 822 | 849 | 923 | 932 | 802 |
| Mexico | 715 | 743 | 756 | 424 | 452 | 411 | 418 | 601 | 476 | 667 |
| Peru | 2.757 | 274 | 2.237 | 1.195 | 1.312 | 739 | 1.342 | 480 | 573 | 409 |
| Philippines | 247 | 202 | 354 | 362 | 358 | 320 | 325 | 324 | 269 | 234 |
| Korea | 172 | 226 | 235 | 165 | 173 | 124 | 185 | 149 | 96 | 112 |
| South Africa | 61 | - | 128 | 153 | 141 | 156 | 109 | 142 | 86 | 89 |
| France | 27 | 29 | 42 | 49 | 36 | 37 | 38 | 35 | 36 | 36 |
| Other | 2 | 1 | 1 | 149 | 54 | - | 50 | - | 55 | - |
| Total | 14.523 | 12.911 | 13.421 | 11.254 | 10.949 | 9.900 | 10.525 | 9.714 | 9.115 | 9.107 |

Source: FAO Fishstat.

5.3. Aquaculture

According to FAO statistics, world production of farmed abalone species (*Haliotis* spp.) amounted to 168.347 tonnes in 2017, up 312% from 2008, thanks to the strong growth of Chinese production.

The leading producers were China (88% of the world production volume) and Korea (10%). To a lesser extent, other important producing countries were South Africa, Chile and Australia (each accounting for 1% of world production volume). Inside the EU, France is the main producer with 7 tonnes produced in 2017, consisting exclusively in the species *Haliotis*

⁴⁸ <http://www.fishtech.com/ThailandSymposium1.pdf>

⁴⁹ See footnote 48.

tuberculata. Some small-scale production also takes place in Spain and Ireland (both below 1 tonne in 2017). In Ireland, other Asian abalone species are also farmed.

Due to the recent development of abalone farming industry, during 2008–2017, all major producing countries experienced strong increasing trends in farmed abalone production: +350% in China, +211% in Korea, +8% in South Africa and 97% in Chile. The EU also experienced a strong increase in production (+96%), primarily in France.

Table 14. **WORLD AQUACULTURE PRODUCTION OF ABALONE, HALIOTIS SPP. (volume in tonnes)**

| Country | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|--------------|---------------|---------------|---------------|---------------|---------------|----------------|----------------|----------------|----------------|----------------|
| China | 33.010 | 41.884 | 54.842 | 73.192 | 86.909 | 105.646 | 110.288 | 122.573 | 134.741 | 148.539 |
| Korea | 5.146 | 6.207 | 6.228 | 6.779 | 6.564 | 7.479 | 8.977 | 10.090 | 12.343 | 16.027 |
| South Africa | 1.037 | 914 | 1.015 | 1.036 | 1.111 | 1.470 | 1.307 | 1.479 | 1.400 | 1.122 |
| Chile | 514 | 841 | 794 | 835 | 828 | 1.111 | 1.130 | 965 | 1.274 | 1.015 |
| Australia | 504 | 681 | 455 | 491 | 605 | 724 | 825 | 850 | 757 | 873 |
| USA | 175 | 200 | 250 | 250 | 250 | 201 | 341 | 341 | 341 | 341 |
| Taiwan | 348 | 218 | 171 | 87 | 79 | 147 | 213 | 345 | 298 | 276 |
| New Zealand | 8 | 8 | 80 | 114 | 101 | 77 | 87 | 81 | 90 | 90 |
| Mexico | 30 | 47 | 23 | 40 | 64 | 60 | 22 | 19 | 12 | 24 |
| Chile | 1 | 2 | - | 6 | 25 | 23 | 16 | 12 | 2 | 16 |
| EU | 4 | 0 | 5 | 6 | 6 | 8 | 6 | 6 | 7 | 8 |
| Other | 46 | 14 | 10 | 21 | 20 | 20 | 5 | 4 | 11 | 4 |
| Total | 40.826 | 51.016 | 63.879 | 82.862 | 96.567 | 116.973 | 123.224 | 136.771 | 151.285 | 168.343 |

Source: FAO Fishstat.

In France, the company “France Haliotis” has been developing since 2004 as an abalone hatchery and farm in Northwest Brittany. Seeds and juveniles are cultured on land (fed with harvested algae), grown in offshore cages (where they feed on natural seaweed), and then marketed after three to five years. The company also sells seeds and juveniles to other farms in France, Spain and Ireland, and target oyster farmers for potential diversification of their activities.

Abalone is very fragile, sensitive to both handling and temperature variations, so high mortality can occur at any stage of the aquaculture process. Therefore, farming is labour intensive (almost 1 FTE⁵⁰ for 1 tonne of product) making the sector still fragile in terms of profitability⁵¹.

5.4. Import – Export

Abalone is traded live/fresh, frozen and prepared/preserved⁵². In 2018, the EU had a trade deficit of EUR 490.050 for abalone products. The deficit is mainly attributable to imports from Australia (56% of total extra-EU import value), Chile (27%), and New Zealand (16%). Most of imports are destined for the UK, which accounts for 64% of the total 16 tonnes of abalone products imported from non-EU countries in 2018.

⁵⁰ Full Time Equivalent.

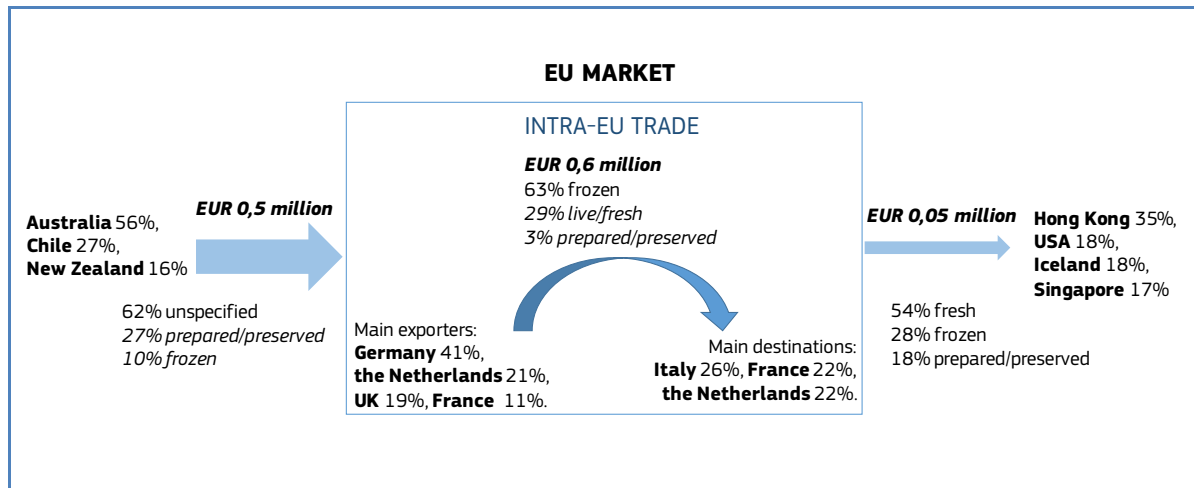
⁵¹ <https://www.abalonebretagne.com/>

⁵² Related CN8 codes: 03078100: Abalone (*Haliotis* spp.), live, fresh or chilled; 03078300: Abalone (*Haliotis* spp.), frozen; 03078700: Abalone (*Haliotis* spp.), other (excl. 0307 81 00, 0307 83 00).

Within the EU⁵³, frozen products accounted for 63% of the total value of abalone trade between Member States. Germany, the Netherlands, the UK and France are the main suppliers (41%, 21%, 19% and 11% of abalone intra-EU exports by value, respectively). The main destinations were Italy, the Netherlands and France (26%, 22%, and 22% of intra-EU exports by value, respectively).

Extra-EU exports are very limited (2,4 tonnes in 2018, of which 63% were live/fresh products). The main destinations were Hong Kong, the USA, Iceland and Singapore.

Figure 41. **THE EU TRADE MARKET FOR ABALONE IN 2018**



Sources: EUMOFA, based on Eurostat (online data code: DS-016890).

5.5. Market insights

The meat of abalone is considered a delicacy in certain parts of Latin America (particularly Chile) as well as France, New Zealand, East Asia, and Southeast Asia. It is mostly marketed live/fresh and whole but can also be traded frozen without the shell and even canned (e.g. in Mexico)⁵⁴. China is by far the main market for abalone products, which consumes 90% of its domestic production⁵⁵ as well as importing from other origins (Australia, the USA, etc.).

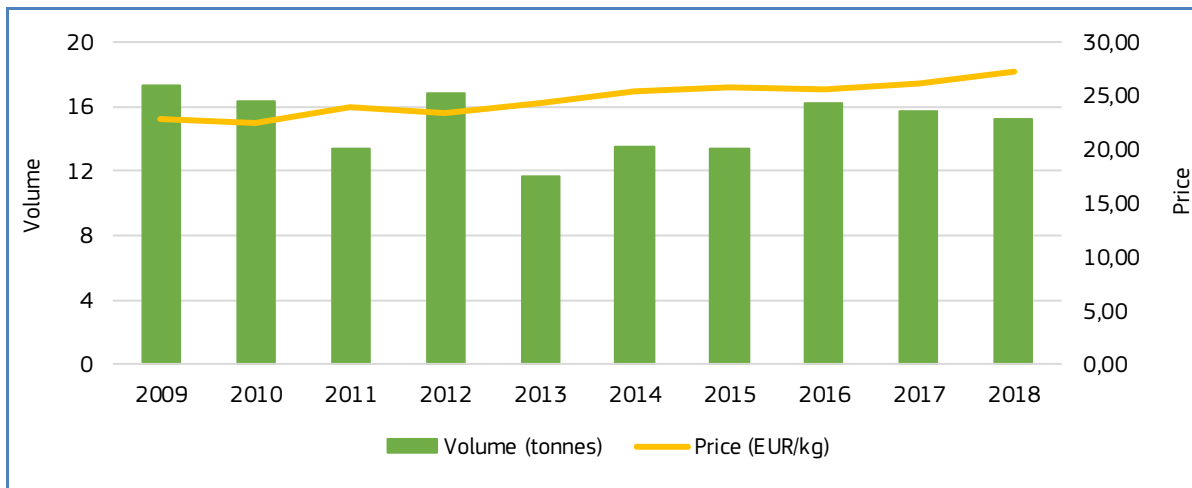
France is the main EU country producing wild-caught abalone. In 2018, about 45% of catches were sold in auctions (15 tonnes). The main auctions involved were in the Channel seaboard: Brest, Saint-Quay-Portrieux, Roscoff and Erquy. While first-sale volumes fluctuated over 2009-2018, their average price in French auctions experienced an increase (+20%) from 22,77 EUR/kg in 2009 to 27,23 EUR/kg in 2018. Some of the abalone sold in French regional markets may come from the Channel Islands (Chausey, Jersey, Guernsey, Alderney).

Figure 42. **FIRST-SALES VOLUMES AND PRICES OF ABALONE IN FRENCH AUCTIONS BY YEAR**

⁵³ For the analysis of intra-EU trade, only export flows (FOB) have been considered. Comparisons dealing with intra-EU trade statistics (and related results) must be considered with caution, and should take discrepancies into account. Intra-EU trade flows reported by Eurostat cover both arrivals (i.e. imports) and dispatches (i.e. exports). Cost, Insurance and Freight (CIF) and Free on Board (FOB) are international shipping agreements used in the transportation of goods. The CIF rule places an obligation on the seller to arrange insurance for the consignment. If the FOB rule is used, once the goods have been loaded on board, risk transfers to the buyer, who bears all costs thereafter. Because of the differences in valuation principle (CIF > FOB), arrivals should be slightly higher valued than dispatches.

⁵⁴ <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/902588/>

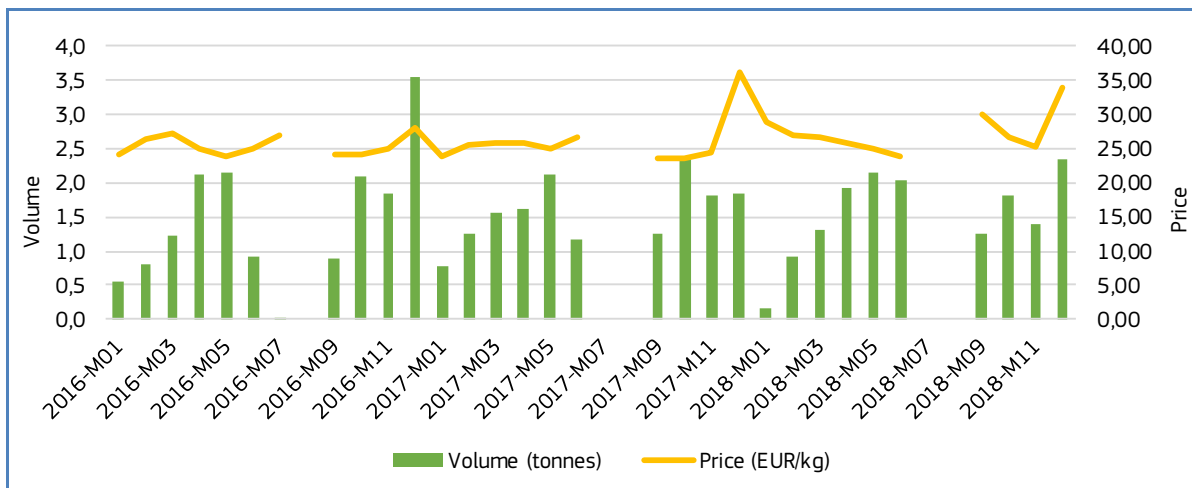
⁵⁵ <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/902597/>



Sources: EUMOFA.

First-sale data in France show the seasonality of the abalone fishing activity, with a closure in summer and price peak in December for the Christmas season.

Figure 43. **FIRST-SALES VOLUMES AND PRICES OF ABALONE IN FRENCH AUCTIONS BY MONTH**



Sources: EUMOFA.

According to French stakeholders, consumer prices of farmed abalone reach 60,00–80,00 EUR/kg, whereas wild-caught abalone is cheaper (40,00–50,00 EUR/kg). The average meat yield⁵⁶ is higher for farmed abalone (40%) than for wild-caught abalone (35%). The reason is that wild-caught abalones are bigger (above 9 cm) so the shell is harder and heavier. Farmed abalone is sold at smaller sizes (4–7 cm) and aquaculture farms typically target especially high-end restaurants, which look for products with a guaranteed supply anytime of the year.

⁵⁶ Meat weight out of total weight.

6. Global highlights

EU / EUMOFA / Fish Market: The 2019 Edition of “The EU fish market”, published in early December, reveals that EU aquaculture production reached a 10-year high of 1,37 million tonnes in 2017 and a value of EUR 5,06 billion. Compared with 10 years ago, its volume increased by 11%. The value almost doubled, due to increased production and prices of some species, such as salmon and seabass. The latter, together with seabream, increased its value considerably in the period 2008–2017, particularly in Spain, where it went up by 125%.

EU / Seychelles / Fisheries: The EU and the Seychelles have concluded negotiations for a new Sustainable Fisheries Partnership Agreement (SFPA) and a new protocol that will strengthen their cooperation in the fisheries field for the next six years. The agreement will allow the EU to continue fishing in Seychelles waters while continuing to support the sustainable development of the fishing sector in the Seychelles. The new agreement is based on the principles of the Common Fisheries Policy in regard to transparency, governance of fishing activities, non-discrimination, respect of scientific advice, and scientific cooperation on data collection and analysis⁵⁷.



EU / Fisheries / TAC: The European Union, the Faroe Islands, Norway, Iceland, Greenland and the Russian Federation reached an agreement on management measures for mackerel, blue whiting and Atlanto-Scandian herring for 2020. The EU, Norway and the Faroe Islands have agreed to set the TAC for mackerel at 922.064 tonnes. Regarding blue whiting, Norway, the Faroe Islands, Iceland, and the European Union set the TAC at 1.161.615 tonnes. For Atlanto-Scandian herring, Norway, the Faroe Islands, Iceland, the Russian Federation, and the European Union agreed to set the TAC at 525.594 tonnes⁵⁸.

EU / Ecuador / IUU: The European Commission notified Ecuador that it needs to step up its actions (yellow card) in the fight against illegal, unreported and unregulated (IUU) fishing. The decision is based on identified shortcomings about compliance with agreed standards under international law of the sea as flag, port and market state. Ecuador needs to develop an enforcement and sanctioning system to address IUU fishing activities as well as adequate control of the activity of processing plants, especially those exporting to the EU. The Commission has also identified limitations in the legal framework for fisheries⁵⁹.

RFMO / GFCM / Management: The 15 recommendations and resolutions, proposed by the European Union, were adopted at the Annual Session of the General Fisheries Commission for the Mediterranean (GFCM). The management plans will help protect the following: turbot in the Black Sea, red coral in the Mediterranean, blackspot seabream in the Alboran Sea, demersal species in the Adriatic Sea, and deep-water shrimp in the Strait of Sicily. The contracting parties also agreed to fight against IUU fishing activities through the better categorisation of cases of non-compliance, launching of pilot projects on the use of electronic logbooks, and the implementation of a centralised vessel monitoring system (VMS) for all GFCM areas of competence⁶⁰.

RFMO / NEAFC / Fisheries: At the annual meeting of the North East Atlantic Fisheries Commission (NEAFC), the European Union and other contracting parties agreed on conservation and management measures for 2020. The Member States also agreed on control and enforcement measures, including the EU proposal on automatically including NEAFC vessels on illegal, unreported and unregulated (IUU) records of other Regional Fisheries Management Organisations (RFMOs). In addition, NEAFC decided to move further on the full implementation of the electronic transmission of fishing logbook and position information⁶¹.

Malta / Aquaculture: In 2017 the Maltese aquaculture industry produced a total of 15.721 tonnes of fish with a total value of EUR 180 million. 13.120 tonnes of Malta's production were bluefin tuna and the remainder was European seabass, gilthead seabream and other species⁶².

⁵⁷ https://ec.europa.eu/fisheries/press/eu-and-seychelles-conclude-negotiations-new-sustainable-fisheries-partnership-agreement_en

⁵⁸ https://ec.europa.eu/fisheries/press/north-east-atlantic-coastal-states-reach-agreement-mackerel-blue-whiting-and-atlanto-scandian_en

⁵⁹ https://ec.europa.eu/commission/presscorner/detail/en/IP_19_6036

⁶⁰ https://ec.europa.eu/fisheries/press/decisive-steps-towards-new-fishing-governance-and-protection-vulnerable-species-mediterranean_en

⁶¹ https://ec.europa.eu/fisheries/press/north-east-atlantic-fisheries-commission-adopts-conservation-and-enforcements-measures-2020_en

⁶² <https://agriculture.gov.mt/en/fisheries/Pages/officeDg.aspx>

7. Macroeconomic Context

7.1 Marine fuel

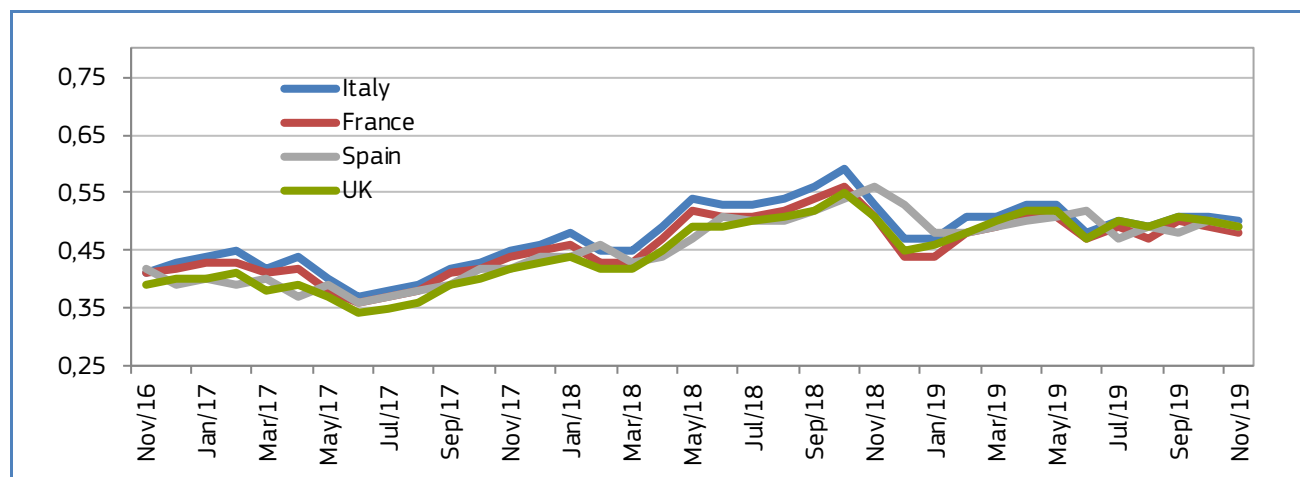
Average prices for marine fuel in **November 2019** ranged between 0,48 and 0,50 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. These prices were about 2% lower compared with the previous month and 6% lower compared with the same month in 2018.

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

| Member State | Nov 2019 | Change from Oct 2019 | Change from Nov 2018 |
|--|----------|----------------------|----------------------|
| France <i>(ports of Lorient and Boulogne)</i> | 0,48 | -2% | -6% |
| Italy <i>(ports of Ancona and Livorno)</i> | 0,50 | -2% | -6% |
| Spain <i>(ports of A Coruña and Vigo)</i> | 0,49 | 0% | -8% |
| The UK <i>(ports of Grimsby and Aberdeen)</i> | 0,49 | -2% | -4% |

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

Figure 44. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**



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

7.2 Consumer prices

The EU annual inflation rate was at 1,1% in October 2019, down from 1,2% in September 2019. In October 2018, the rate was 2,3%.

Inflation: lowest rates in October 2019, compared with September 2019.



Inflation: highest rates in October 2019, compared with September 2019.



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

| HICP | Oct 2017 | Oct 2018 | Sep 2019 | Oct 2019 | Change from Sep 2019 | Change from Oct 2018 |
|----------------------------------|----------|----------|----------|----------|----------------------|----------------------|
| Food and non-alcoholic beverages | 102,82 | 104,52 | 106,42 | 106,51 | ↑ 0,1% | ↑ 1,9% |
| Fish and seafood | 107,01 | 109,46 | 111,28 | 110,93 | ↓ 0,3% | ↑ 1,3% |

Source: Eurostat

7.3 Exchange rates

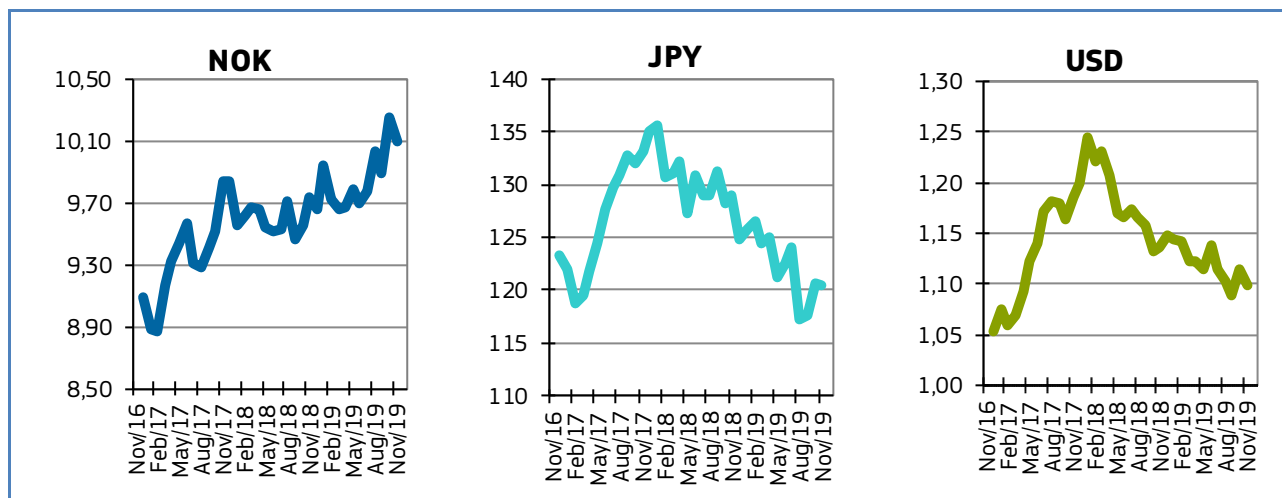
Table 17. EXCHANGE RATES FOR SELECTED CURRENCIES

| Currency | Nov 2017 | Nov 2018 | Oct 2019 | Nov 2019 |
|----------|----------|----------|----------|----------|
| NOK | 9,8398 | 9,7400 | 10,2520 | 10,1045 |
| JPY | 133,08 | 128,99 | 120,73 | 120,43 |
| USD | 1,1849 | 1,1359 | 1,0982 | 1,0982 |

Source: European Central Bank

In November 2019, the euro depreciated against the Japanese yen (-0,2%), the Norwegian krone (-1,4%), and the US dollar (-1,5%) from October 2019. For the past six months, the euro has fluctuated around 1,11 against the US dollar. Compared with November 2018, the euro has depreciated 6,6% against the Japanese yen and 3,3% against the US dollar, but it appreciated 3,7% against the Norwegian krone.

Figure 45. TREND OF EURO EXCHANGE RATES



Source: European Central Bank

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

First sales: DG Mare – European Commission, European Council, sciencedirect.com, bim.ie.

Consumption: EUROPANEL, FAO.

Case studies: FAO, Ocean Outcomes, Intrafish, Worldometers, Ministry of Agriculture of Russia, Federal Agency for Fisheries of Russia, Infofish, Flanders State of the Art, SeafoodSource, DORIS, FishTech, Abalone Bretagne.

Global highlights: DG Mare-European Commission, Department of Fisheries and Aquaculture of Malta.

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

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

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

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

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