

Monthly Highlights

No. 2 / 2020

E U M O F A

European Market Observatory for
Fisheries and Aquaculture Products

In this issue

From December 2016 to November 2019, the average first-sales price of common edible cockle in Spain was 5,80 EUR/kg, compared to 1,32 EUR/kg in Portugal and 0,71 EUR/kg in Denmark. The highest average price of great Atlantic scallop was recorded in the UK (2,78 EUR/kg), slightly more than the average price in France (2,76 EUR/kg), and in Belgium (2,69 EUR/kg).

The average import price of fresh/chilled yellowfin tunas from the Maldives was 9,28 EUR/kg in the second week of December, a 2% increase from the price in the same week of 2018.

In January–November 2019, the average retail price of fresh swordfish in Italy was 17,71 EUR/kg, a 2% increase compared to the same period in 2018.

In 2020, the main Total Allowable Catch (TAC) changes relative to 2019 are: reductions for cod, hake, sprat, saithe, anglerfish, herring, and plaice and increases for haddock, mackerel, and common sole.

India's total fish production for 2017-18 is estimated at 12,60 million tonnes, of which nearly 70% is from the inland sector and about 50% of the total production is from aquaculture.



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1 First sales in Europe

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

1.1. Compared to the same period last year

Increases in value and volume: first sales grew in Estonia, Greece, Italy, Latvia, Poland, Portugal, and the UK. Increased supply of both mackerel and squid was the main factor leading to higher first sales in Greece.

Decreases in value and volume: first sales declined in Belgium, Denmark, France, Lithuania, and Sweden. The decrease in Denmark was mainly due to a decline in herring and plaice supply.

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

Country	January–November 2017		January–November 2018		January–November 2019		Change from January–November 2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	14.547	59,08	13.012	55,11	12.424	53,08	-5%	-4%
Denmark	247.718	329,53	257.944	345,54	241.078	324,96	-7%	-6%
Estonia	42.300	9,95	43.595	11,06	55.849	12,30	28%	11%
France	179.056	606,13	175.649	582,60	165.187	556,81	-6%	-4%
Greece	n/a	n/a	20.151	43,46	23.349	48,51	16%	12%
Italy	87.042	309,80	79.573	288,25	81.101	320,39	2%	11%
Latvia	53.621	10,76	44.518	8,02	48.230	8,14	8%	1%
Lithuania	1.460	1,33	1.586	1,15	849	0,64	-46%	-45%
Norway	2.761.674	2.221,53	2.875.300	2.401,60	2.719.944	2.465,54	-5%	3%
Poland	83.168	28,19	74.107	23,19	85.058	23,79	15%	3%
Portugal	89.521	176,40	94.308	185,36	105.958	193,54	12%	4%
Spain	430.996	1095,37	461.246	1265,37	448.372	1281,93	-3%	1%
Sweden	471.467	346,30	446.693	259,81	246.253	126,12	-45%	-51%
UK	276.607	497,65	249.735	478,24	268.890	561,89	8%	17%

Source: EUMOFA (updated 16.01.2020).

* Volumes 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 cover 229 ports (approximately 50% of the total landings in the country). Possible discrepancies in % changes are due to rounding.

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

1.2. In November 2019

Increases in value and volume: first sales grew in Greece and Poland. The increase in Poland was due to an increase in the supply of sprat and flounder.

Decreases in value and volume: first sales declined in Belgium, Denmark, France, Italy, Latvia, Lithuania, Spain, and the UK. For Belgium, the drop was due to a decrease in the supply of European plaice and shrimp (*Crangon* spp.). In Italy, first sales decreased due to a lower supply of anchovy.

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

	November 2017		November 2018		November 2019		Change from November 2018	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.552	6,54	1.446	5,76	1.144	5,37	-21%	-7%
Denmark	32.593	39,35	38.109	46,48	31.237	38,11	-18%	-18%
Estonia	5.627	1,29	6.023	1,89	8.621	1,70	43%	-10%
France	17.935	59,19	15.915	52,82	14.284	47,08	-10%	-11%
Greece	n/a	n/a	1.936	4,50	2.406	5,74	24%	27%
Italy	7.240	26,25	7.227	26,51	6.110	25,72	-15%	-3%
Latvia	6.937	1,35	8.491	1,42	4.132	0,75	-51%	-47%
Lithuania	165	0,12	271	0,12	124	0,05	-54%	-54%
Norway	288.284	205,49	298.573	253,73	311.117	240,14	4%	-5%
Poland	2.434	1,00	1.516	0,39	5.375	1,59	255%	305%
Portugal	6.471	12,64	5.738	13,92	8.740	11,88	52%	-15%
Spain	36.957	102,42	42.138	115,93	27.854	98,93	-34%	-15%
Sweden	13.224	8,58	5.715	3,00	4.505	4,48	-21%	50%
UK	23.062	39,92	38.348	77,30	25.630	54,15	-33%	-30%

Source: EUMOFA (updated 16.01.2020).

Volumes 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 cover 229 ports (approximately 50% of the total landings in the country).

Possible discrepancies in % changes are due to rounding.

The most recent weekly first-sales data (up to week 8 of 2020) are available via the EUMOFA website, and can be accessed [here](#).

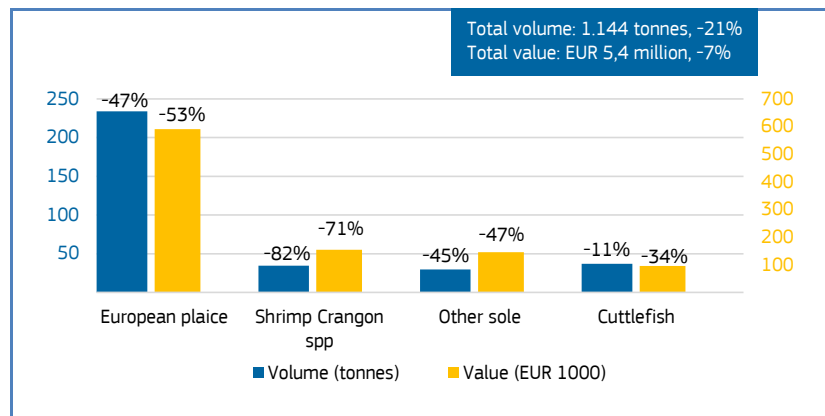
The most recent monthly first-sales data for December 2019 are available via the EUMOFA website, and can be accessed [here](#).



1.3. First sales in selected countries

 Overall, in **Belgium** in **January–November 2019**, first-sales value and volume fell slightly (by 4% and 5%, respectively), compared to the same period in 2018. The species contributing the most to this decline were cuttlefish, European plaice, and shrimp (*Crangon* spp.). In **November 2019**, both total value and volume decreased relative to November 2018. Shrimp (*Crangon* spp.), European plaice, cuttlefish and other sole* species were among the main species responsible for this trend. Shrimp (*Crangon* spp.) production in November 2019 fell to the level reported in November 2016. While shrimp production was above that of November 2017, it was still below the 10-year average of around 100 tonnes. Production in November 2018 appears to be an exception, partly due to good weather conditions (namely a heatwave during the summer period).

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

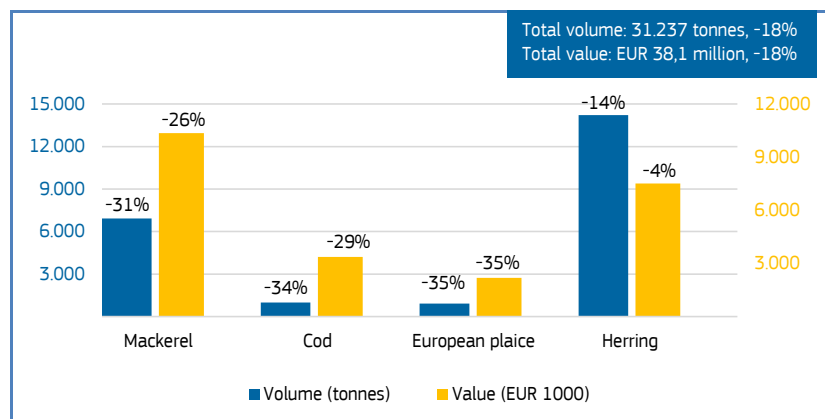


Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020).

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

 In **Denmark** in **January–November 2019**, shrimp (*Crangon* spp.) was the main species responsible for the decrease of 6% in first-sales value, while herring was behind the overall 7% fall in volume, compared to the same period in 2018. In **November 2019**, first sales decreased by 18% in both value and volume, compared to November 2018. The main species causing this declining trend include mackerel, cod, European plaice, and shrimp (*Crangon* spp.).

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

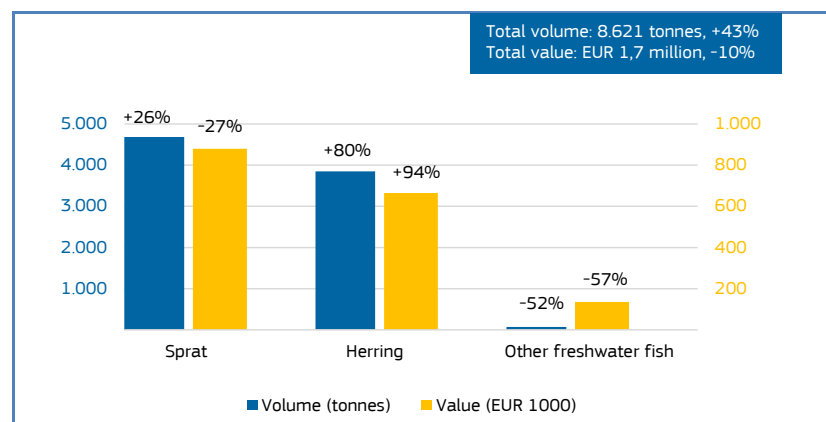


Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020).



 In **January–November 2019**, **Estonia** saw growth in both first-sales value (+11%) and volume (+28%) compared to the same period a year previously, mainly due to herring (+27% in both value and volume) and sprat in volume (+26%). In **November 2019** compared to November 2018, first sales shrank by 10% in value, whereas volume spiked by 43%. Overall value fell, mainly due to the average price of sprat decreasing by 42%, while volume grew due to an increase in supply of herring and sprat. A combination of market demand, fish stock availability and weather conditions led to an increase in herring sales.

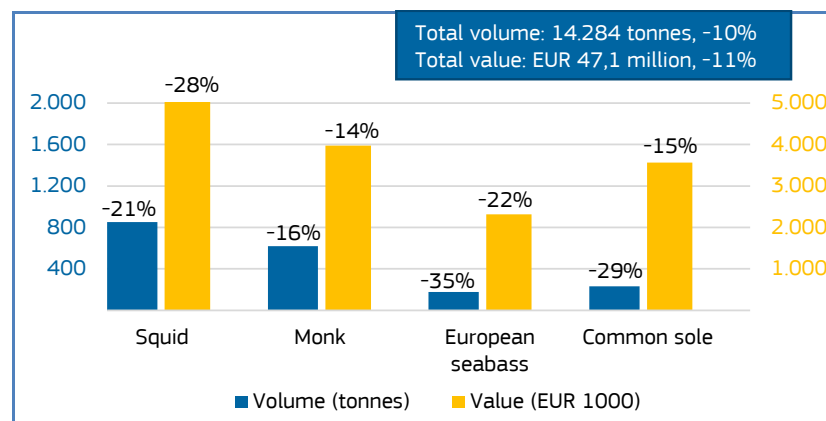
Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, NOVEMBER 2019**



Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020).

 In **January–November 2019**, first sales decreased by 4% in value and 6% in volume compared to January–November 2018. In **November 2019**, compared to November 2018, squid, monk, European seabass, and common sole were among the key species responsible for decreases in both value and volume. Among the key species, common sole and European seabass registered the highest increase in average price at 20%, reaching 15,38 EUR/kg and 12,99 EUR/kg, respectively.

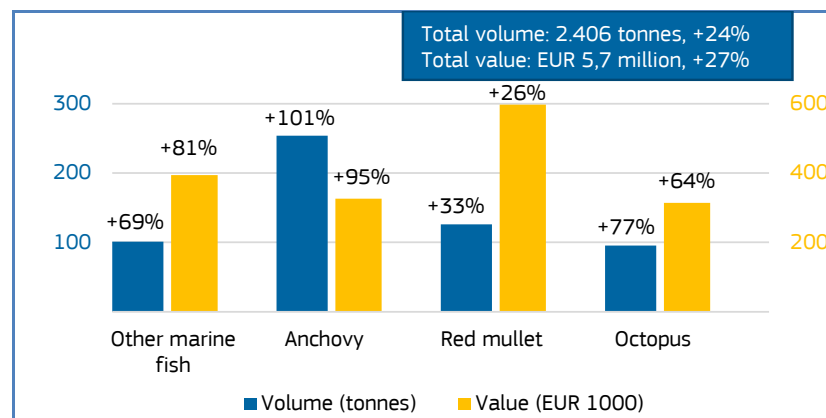
Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, NOVEMBER 2019**



Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020).

 In **January–November 2019**, compared to the same period in 2018, first-sales value increased by 12%, while volume went up by 16% due to higher supply of sardine. In **November 2019**, first-sales value and volume were higher than in November 2018, at 27% and 24%, respectively. This growth was due to other marine fish* (mainly greater amberjack), anchovy, red mullet, and octopus.

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GREECE, NOVEMBER 2019**

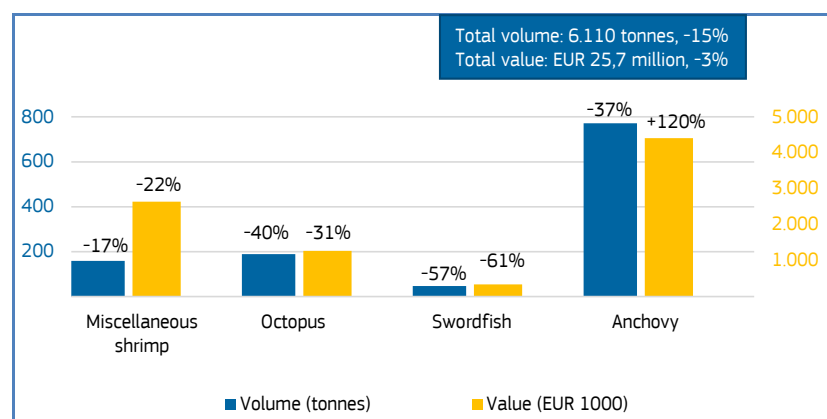


Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020). *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).



In Italy in January–November 2019, compared to the same period in 2018, first sales grew by 11% in value and 2% in volume. These changes were due to increasing value of anchovy and increasing volume of clam and sardine. In **November 2019**, sales decreased in value and volume compared to November 2018. Decreasing value of miscellaneous shrimp*, octopus and swordfish, and decreasing volume of mainly anchovy were among the main factors responsible for such trends. The decrease in first-sales volume of anchovy was due to bad weather conditions that led to fewer fishing days in November 2019, compared to November 2018.

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, NOVEMBER 2019**

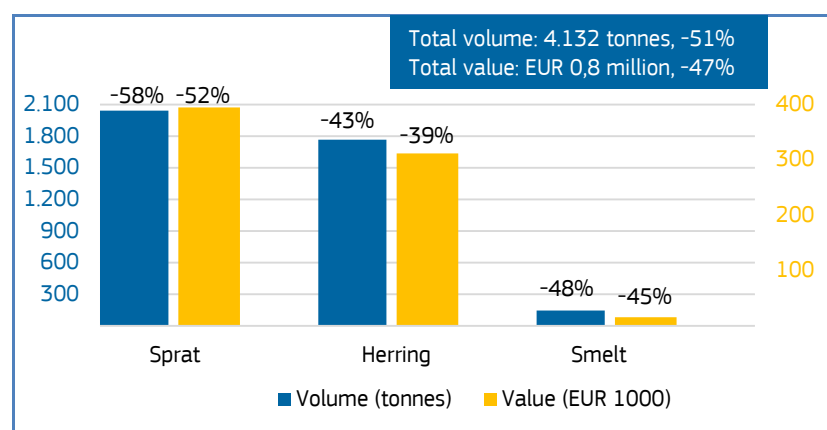


Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020). *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).



In Latvia in January–November 2019, small pelagic species (smelt and herring) were the key species responsible for increases in first-sales value and volume (+1% and +8%, respectively) compared to the same period in 2018. In **November 2019**, first sales fell by 47% in value and 51% in volume compared to November 2018, mainly due to sales of sprat, herring, and - to a lesser extent - smelt. The average price of sprat increased by 13% to 0,19 EUR/kg, due to reduced supply and stable market demand.

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, NOVEMBER 2019**

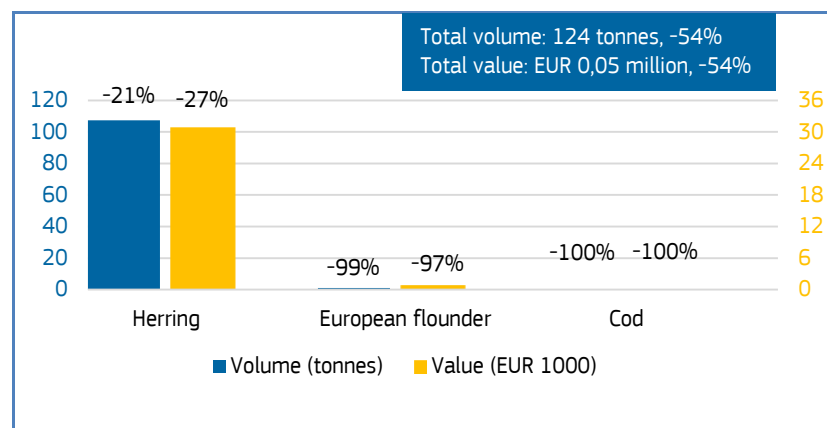


Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020).



In Lithuania in January–November 2019, first sales decreased by 45% in value and 46% in volume compared to January–November 2018, mainly due to cod. In **November 2019**, first sales continued a downward trend compared to November 2018. This was especially due to the banning of cod fishing in ICES subdivisions 24, 25 and 26 since July 2019, according to EU Regulation 2019/1248 on emergency measures to alleviate pressure on eastern Baltic cod stocks.

Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, NOVEMBER 2019**



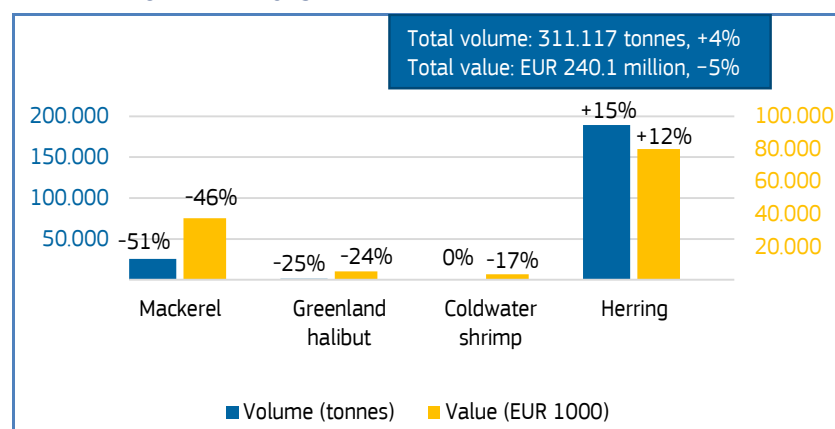
Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020). *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).



In **Norway** in
January–November

2019, first sales increased by 3% in value and decreased by 5% in volume, compared to the same period in 2018. Value grew slightly due to higher cod and herring sales, while volume fell due to miscellaneous small pelagics*. In **November 2019**, compared to November 2018, first-sales value fell, while volume went up. The main species behind the decrease in value was mackerel, while the increase in volume was the result of significantly higher herring supply.

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



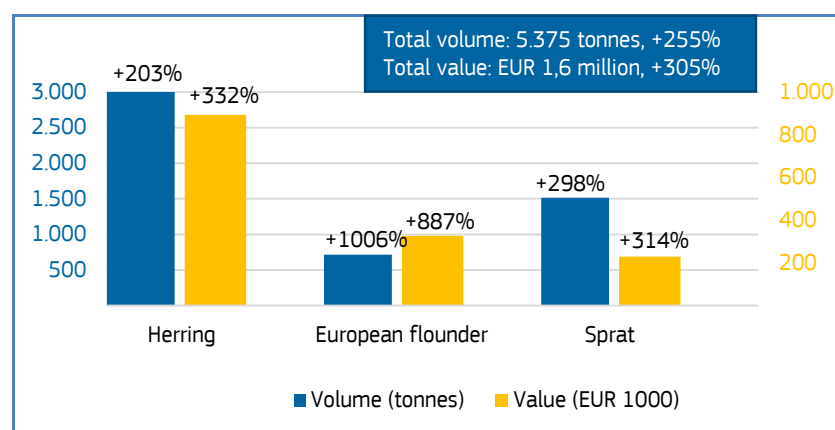
Percentages show change from the previous year. Volume data is reported in live weight equivalent (LWE). Prices are reported in EUR/kg of live weight. *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).



In **Poland** in
January–November

2019, first sales increased by 3% in value and 15% in volume due to high sales of European flounder, sprat, and herring, compared to the same period in 2018. In **November 2019** compared to November 2018, first-sales value spiked upwards 2,5-fold while volume grew over 3-fold due to high supply of herring, sprat and European flounder. Good weather conditions and stock availability were behind significant increases in first sales of herring. A ban on cod fishing redirected fishermen to focus on European flounder.

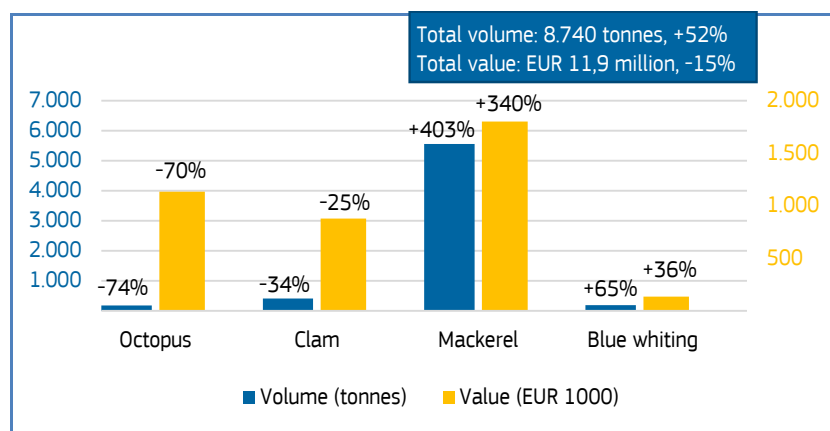
Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, NOVEMBER 2019**



Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020).

**In Portugal in
January–November**

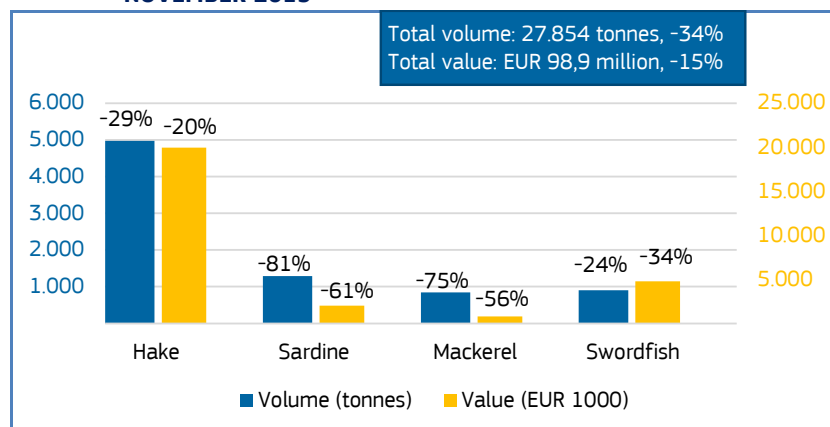
2019, first sales increased by 4% in value and 12% in volume compared to the same period in 2018. These increases were mostly linked to high sales of Atlantic horse mackerel and mackerel. In **November 2019** compared to November 2018, first-sales value decreased due to octopus, while volume grew largely due to mackerel. Other important species that affected overall trends in November include clam and blue whiting. The increase in mackerel sales was due partly to an improvement in the stock, which led to higher quotas. It was also due to a lack of sardine, as sardine is in demand in Portuguese and Spanish markets and mackerel is one of its substitute products.

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

Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020).

**In Spain in
January–November**

2019, first sales increased in value by 1% due to anchovy, deep-water rose shrimp and albacore tuna, whereas volume slightly decreased due to low supply of mackerel compared to the same period in 2018. In **November 2019**, first-sales value and volume decreased in comparison to the same month in 2018, mostly due to hake, sardine, mackerel, and swordfish. An abrupt decrease in sales of sardine and mackerel reflects an advance of both catches and the seasonality of the purse seine fishery.

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

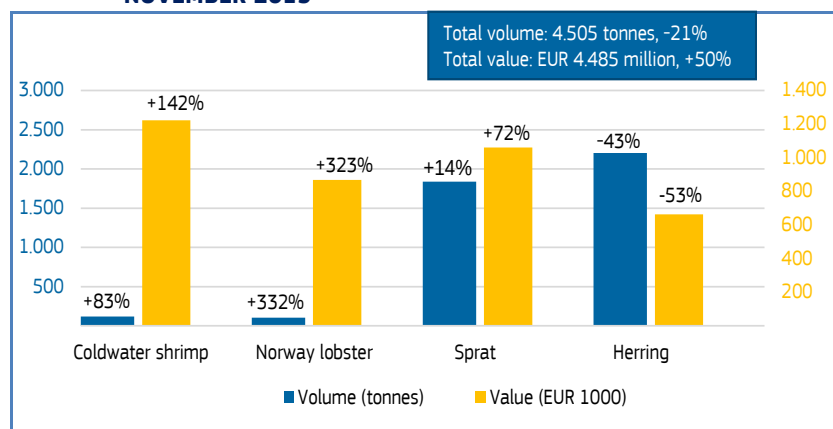
Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020).



In **Sweden** in
January–November

2019, first sales dropped in value (-51%) and significantly in volume (-45%) compared to the same period in 2018, mainly due to herring (-66% in value and -61% in volume). In **November 2019** compared to November 2018, first-sales value grew by 50% due to coldwater shrimp, Norway lobster, and sprat. On the other hand, first-sales volume decreased by 21% as a result of a reduced supply of herring. Increases in sales of Norway lobster are linked with an increase in supply of foreign vessels, on which the market strongly depends.

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



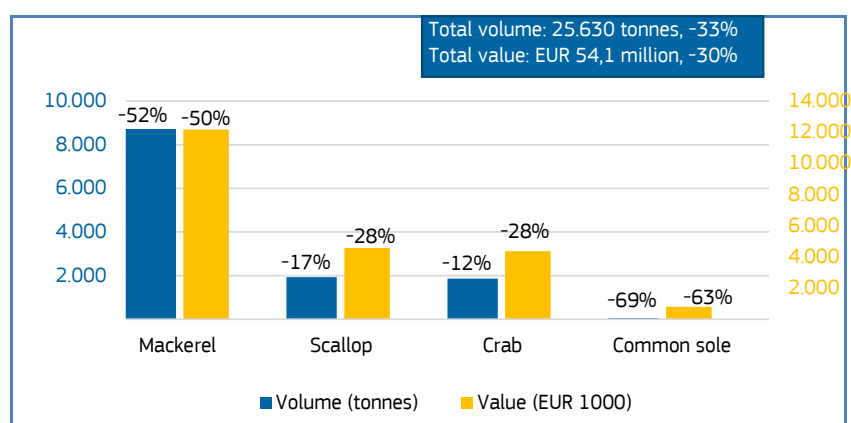
Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020)



In the **UK** in
January–November

2019, first-sales value and volume increased by 17% and 8%, respectively, compared to the same period in 2018. The increases were mostly due to Norway lobster, crab, and haddock. In **November 2019**, first-sales value and volume decreased by almost one-third, compared to November 2018. The main species responsible for such negative trends include mackerel, scallop, crab, and common sole.

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

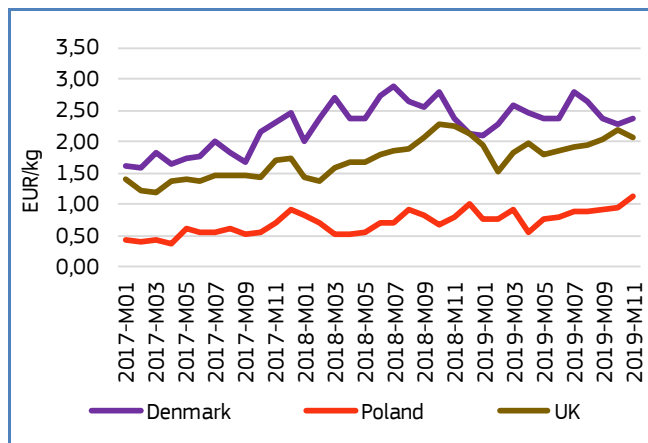


Percentages show change from the previous year. Source: EUMOFA (updated 16.01.2020).



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

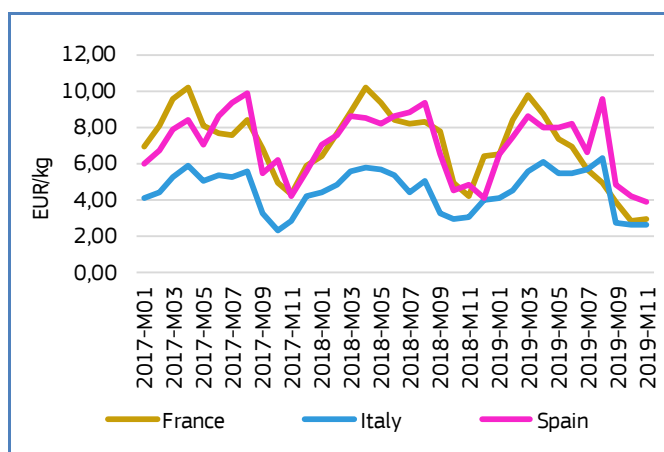
Figure 15. **FIRST-SALES PRICES OF EUROPEAN PLAICE IN DENMARK, POLAND, AND THE UK**



Source: EUMOFA (updated 16.01.2019).

First sales of **European plaice** occur in many European countries, including **Denmark**, **Poland**, and the **UK**. The average first-sales prices in November 2019 (the most recent available data) reached 2,37 EUR/kg in Denmark (up by 4% from October 2019, unchanged compared to October 2018); 0,75 EUR/kg in Poland (up by 18% from the previous month, and up by 43% from the previous year); and 2,07 EUR/kg in the UK (down both from October 2019 and November 2018, by 6% and 8%, respectively). Fisheries are seasonal in all countries. In Denmark and Poland, supply peaks in June–August, and in the UK in October–November. In the past 36 months, European plaice prices have increased in all three countries. At the same time, supply decreased in Denmark and the UK.

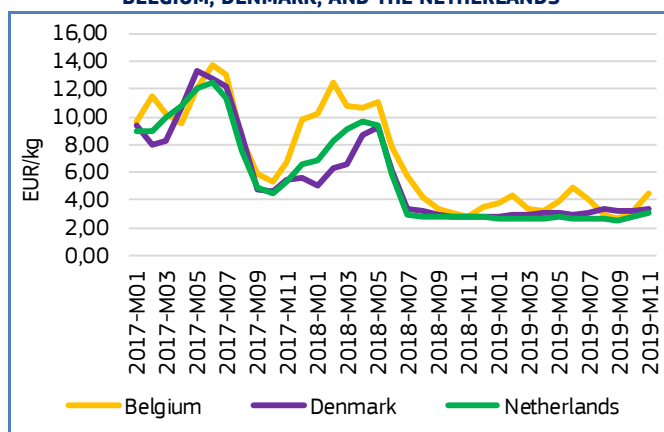
Figure 16. **FIRST-SALES PRICES OF RED MULLET IN FRANCE, ITALY, AND SPAIN**



Source: EUMOFA (updated 16.01.2019).

EU first sales of **red mullet** take place mainly in **Spain**, as well as in **Italy** and **France**. In November 2019, the average first-sales prices of red mullet were: 2,90 EUR/kg in France (4% higher than in October 2019, but 31% lower compared with November 2018); 2,62 EUR/kg in Italy (up by 2% from the previous month, but down by 14% from the previous year), and 3,88 EUR/kg in Spain (a decrease from both the previous month and a year earlier, -8% and -19%, respectively). Prices fluctuated considerably in all three countries and correlated with supply (prices spike when supply is low). Prices decreased in both Italy and Spain, while they increased in France. First-sales volume are seasonal in the three markets with peaks between October and November.

Figure 17. **FIRST-SALES PRICES OF SHRIMP CRANGON SPP. IN BELGIUM, DENMARK, AND THE NETHERLANDS**



Source: EUMOFA (updated 16.01.2019).

EU first sales of **shrimp Crangon spp.** take place in many European countries, most notably in **the Netherlands**, and to a lesser extent in **Denmark** and **Belgium**. In November 2019, the average first-sales prices were: 4,47 EUR/kg in Belgium (up from both previous month and a year earlier: +40% and +63%, respectively); 3,37 EUR/kg in Denmark (4% up over October 2019 and up by 20% over November 2018, and 3,01 EUR/kg in the Netherlands (up by 8% from previous month and up by 10% from previous year). Since July 2018, prices decreased substantially in all of the three countries. First-sales prices showed different trends: upward in Belgium and Denmark, and stable in the Netherlands. At the same time, supply decreased in all three countries. Volumes sold in first-sales markets are seasonal. In Belgium and the Netherlands, they peak in September–October, and in Denmark in April–June.

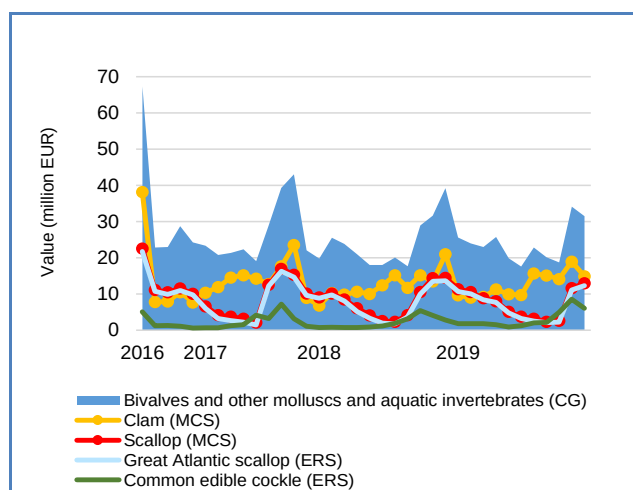
1.5. Commodity group of the month: bivalves and other molluscs, and other aquatic invertebrates²

The 'bivalves and other molluscs, and other aquatic invertebrates' commodity group (CG³) ranked 6th in value and 3rd in volume among the 10 CGs sold at the first-sale stage in November 2019⁴. First sales of these species reached EUR 31,5 million and 13.136 tonnes, remaining stable in value and slightly decreasing by 2% in volume compared to November 2018. In the past 36 months, the highest value of first sales of bivalves and other molluscs was registered in December 2016, at EUR 67,3 million.

The bivalve commodity group includes 10 main commercial species (MCS): abalone, clam, jellyfish, mussel *Mytilus* spp., other mussel, oyster, scallop, sea cucumber, sea urchin, and other molluscs, and other invertebrates⁵.

At Electronic Recording and Reporting System (ERS) level, common edible cockle (19%) and great Atlantic scallop (39%) together make up 58% of total reported first-sales value of this commodity group in November 2019.

Figure 18. **FIRST-SALES VALUE COMPARISON AT CG LEVEL, MCS LEVEL AND ERS LEVEL FOR REPORTING COUNTRIES* (DEC 2016–NOV 2020)**



*Norway is excluded from the analyses.
Source: EUMOFA (updated 16.01.2020).

1.6. Focus on common edible cockle



Common edible cockle (*Cerastoderma edule*) is a species of saltwater clam, a marine bivalve mollusc that belongs to the Cardiidae (cockle) family. It is found in waters off Europe and western Africa, from Iceland to Senegal. It lives under the surface on sand, mud and gravel bottoms, buried at a maximum of a few meters deep, mainly in intertidal habitats with some arrival of fresh water. It can reach a maximum length of 5,6 cm, although is more commonly 3 to 4 cm long. The common edible cockle has a pale or whitish yellow, grubby white, or brown shell. The lifespan of a cockle is generally two to four years on average, but occasionally they can reach ten years old. Sexual maturity is generally reached during the second year. Spawning occurs in early summer and the autumn.

The main EU cockle fisheries occur in the waters of the British Isles, the Netherlands and France, using bottom trawls and dredges⁶. There are no specific management measures at the EU level. In the Netherlands and the UK⁷, there are local management measures based on minimum shell size, number of cockles harvested, and the fisheries methods used⁸.

² In the further text a term "bivalve" includes bivalve and other molluscs, and aquatic invertebrates.

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

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

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

⁶ <http://www.fao.org/fishery/species/3535/en>

⁷ Aikens, Tom. Fish, p. 547 (Random House, 2012).

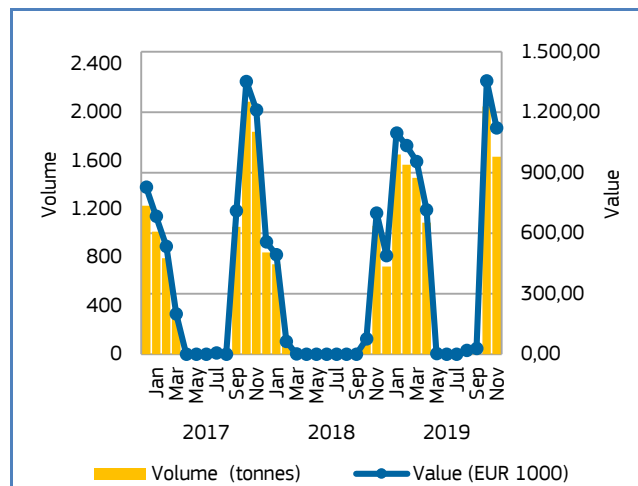
⁸ <https://eol.org/pages/46473663/articles>



Selected countries

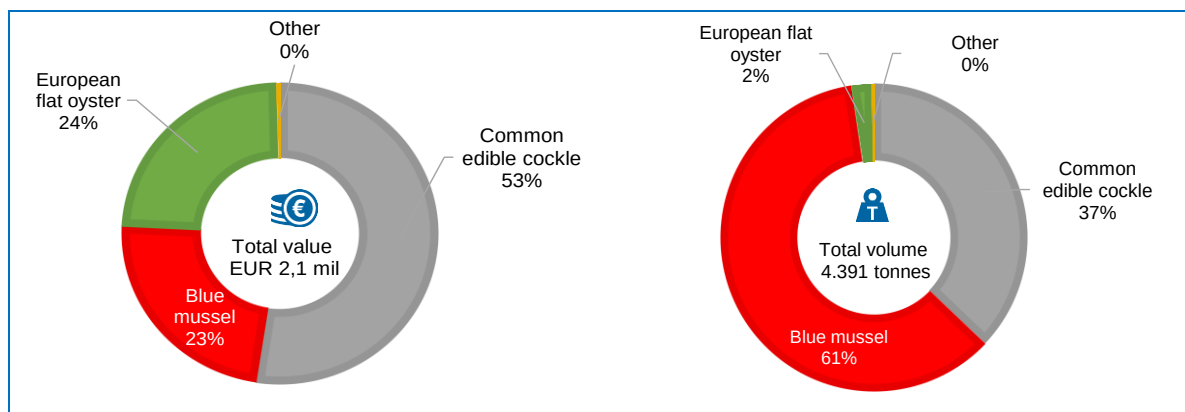
In **Denmark** in January–November 2019, first sales of common edible cockle skyrocketed by 375% in value and 371% in volume compared to the same period in 2018. The reason behind such strong increases is that the levels of production in 2019 are back to those observed in 2017. Almost all cockle landings in Denmark come from the Limfjorden, where cockles are fished as by-catch in the mussel fishery. Mussel landings observed in 2018 were extremely low due to poor resource condition (meat content). Consequently, the low cockle landings in 2018 resulted from a combination of fishing strategies, constraints on the cockle fishery associated with being a by-catch species, and the poor condition of cockles and mussels during autumn. Compared with January–November 2017, first-sales value and volume of common edible cockle were higher by 35% and 34%, respectively. Of bivalves sold at first-sales stage in November 2019, common edible cockle accounted for 53% of total first-sales value and 37% of first-sales volume. Ørødde and Jegindø in the North Sea were the ports where 97% of first sales occurred in January–November 2019.

Figure 19. **COMMON EDIBLE COCKLE: FIRST SALES IN DENMARK**



Source: EUMOFA (updated 16.01.2020).

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



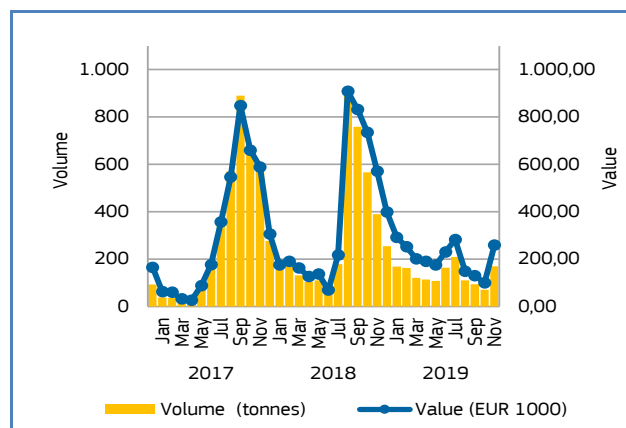
Source: EUMOFA (updated 16.01.2020).

In **Portugal** in January–November 2019, first sales of common edible cockle decreased by 45% in value and 58% in volume from January–November 2018. Compared with the same period in 2017, value and volume decreased by 34% and 57%, respectively.

Of bivalves sold in November 2019, common edible cockle accounted for 28% of total first-sales value and 39% of total first-sales volume.

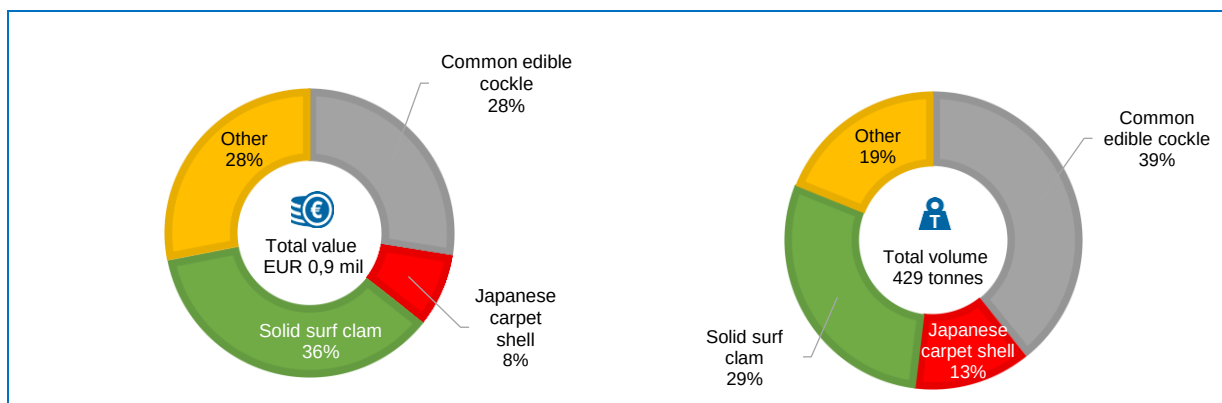
The port of Aveiro on Portugal's Atlantic coast was responsible for 90% of total first-sales value between January–November 2019.

Figure 21. **COMMON EDIBLE COCKLE: FIRST SALES IN PORTUGAL**



Source: EUMOFA (updated 16.01.2020).

Figure 22. **FIRST SALES: COMPARISON OF BIVALVES (ERS) IN PORTUGAL, VALUE AND VOLUME, NOVEMBER 2019**



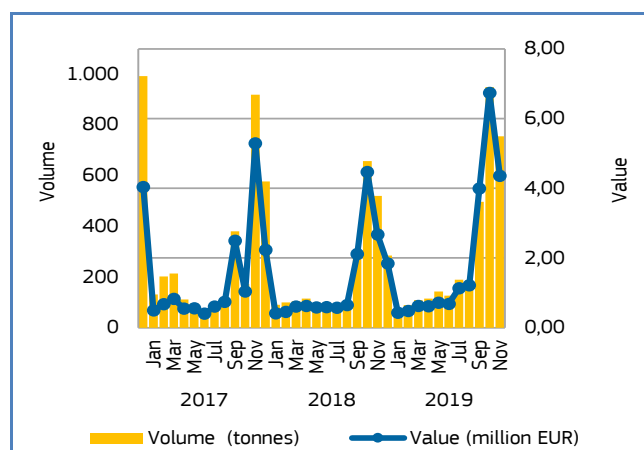
Source: EUMOFA (updated 16.01.2020).

In **Spain** in January–November 2019, first sales of common edible cockle increased by 53% in value and 46% in volume compared to the same period in 2018. Compared with January–November 2017, first-sales value and volume were higher by 54% and 29%, respectively.

Of bivalves sold at first-sales stage in November 2019, common edible cockle accounted for 38% in value and 44% in volume.

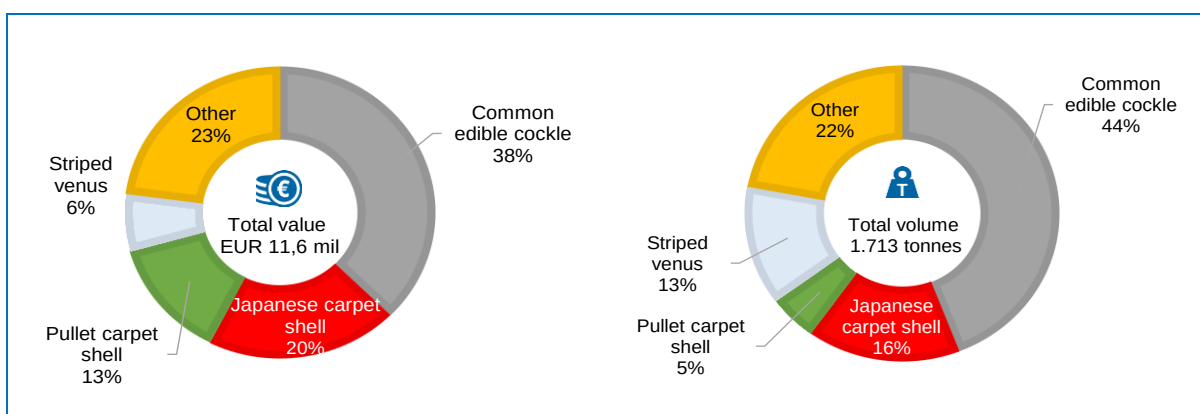
Noia, Carril, and Rianjo, near the Bay of Biscay, were the ports with the highest first-sales value in January–November 2019.

Figure 23. **COMMON EDIBLE COCKLE: FIRST SALES IN SPAIN**



Source: EUMOFA (updated 16.01.2020).

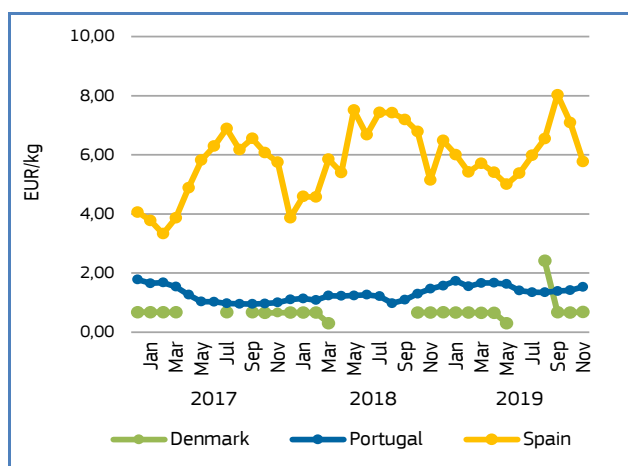
Figure 24. **FIRST SALES: COMPARISON OF BIVALVES (ERS) IN SPAIN, VALUE AND VOLUME, NOVEMBER 2019**





Price trend

Figure 25. **COMMON EDIBLE COCKLE: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 16.01.2020).

In the observed 36-month period (December 2016–November 2019), the average first-sales price of common edible cockle in Spain was 5,80 EUR/kg, or about seven times higher than the price in Denmark (0,71 EUR/kg), and three-and-a-half times more than the price in Portugal (1,32 EUR/kg).

In **Denmark** in November 2019, the average first-sales price of common edible cockle (0,69 EUR/kg) increased by 4% compared to November 2018 and 2017. During the past 36 months, the lowest price was recorded in May 2019 (at 0,30 EUR/kg for 6 tonnes). The highest price (2,41 EUR/kg for 8 tonnes) was recorded in August 2019 and is considered a pre-season price, since the highest fishery activities start in autumn. There are no recorded by-catches of cockle, or they are minor during the summer when blue mussels fishing does not occur.

In **Portugal**, the average price of common edible cockle was 1,53 EUR/kg in November 2019, 4% higher than the price in November 2018, and 52% higher than the price in November 2017. Prices reached a peak in December 2016, when 93 tonnes were sold at the average price of 1,78 EUR/kg. The lowest price was recorded in September 2017, at 0,95 EUR/kg for 890 tonnes.

In **Spain** in November 2019, the average first-sales price of common edible cockle (5,77 EUR/kg) rose by 12% compared to November 2018 and was the same as November 2017. The lowest price in the observed period was recorded in February 2017 at 3,33 EUR/kg for 202 tonnes. The highest price (at 8,03 EUR/kg for 497 tonnes) was observed in September 2019.



1.7. Focus on great Atlantic scallop



The great Atlantic scallop (*Pecten maximus*), also called the king scallop or St. James shell, is a northeast Atlantic species of scallop, a marine bivalve mollusc belonging to the family Pectinidae. It is distributed from Norway to the Atlantic coast of Spain, and throughout the North Sea⁹. In the UK and in the Republic of Ireland it is distributed along the coast. *Pecten maximus* grows up to 15 cm, lives up to 20 years, and reaches sexual maturity between 2–4 years of age¹⁰. It is usually partly buried in sand, at depths ranging from 5 to 150 metres.

There are three methods that are traditionally used for harvesting scallops: diving, bottom trawling and dredging. The main fishing gear used is the scallop dredge. In Europe, France and the UK are the nations that catch the most in terms of value¹¹. For great Atlantic scallops, current EU legislation specifies a minimum conservation reference size length of 110 mm in the Irish Sea and English Channel, and 100 mm in other fishing areas¹². Gear selectivity measures and minimum landing sizes (MLS) are common measures to ensure that scallops are not harvested before they grow large enough to breed. The minimum marketing size for scallop is 10 cm¹³. In 2016, scallop ranked 15th among the most consumed species in the EU¹⁴.

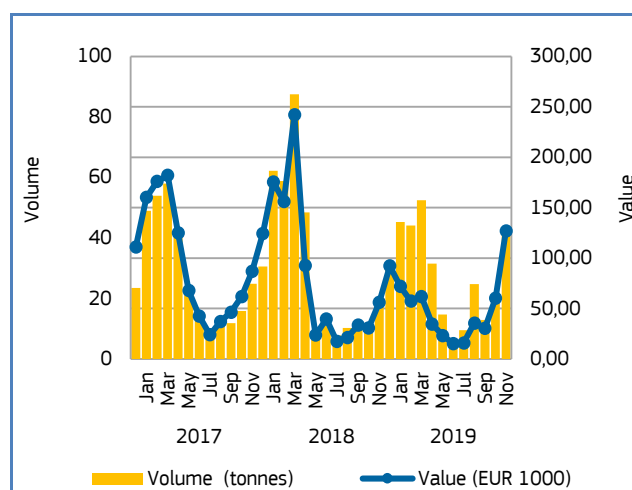
Selected countries

In **Belgium** in January–November 2019, first sales of great Atlantic scallop decreased by 40% in value and by 11% in volume compared to the same period in 2018. Compared with January–November 2017, first-sales value sharply fell by 47%, due to lower average price, while volume slightly decreased by 3%.

Of bivalves sold in November 2019, great Atlantic scallop made up 77% of total first-sales value and 67% of volume.

Ostend, Zeebrugge, and Nieuwpoort were the fishing ports where all first-sales value was registered from January to November 2019.

Figure 26. **GREAT ATLANTIC SCALLOP: FIRST SALES IN BELGIUM**



Source: EUMOFA (updated 16.01.2020).

⁹ http://species-identification.org/species.php?species_group=mollusca&id=890

¹⁰ <http://www.marlin.ac.uk/biotic/browse.php?sp=4236>

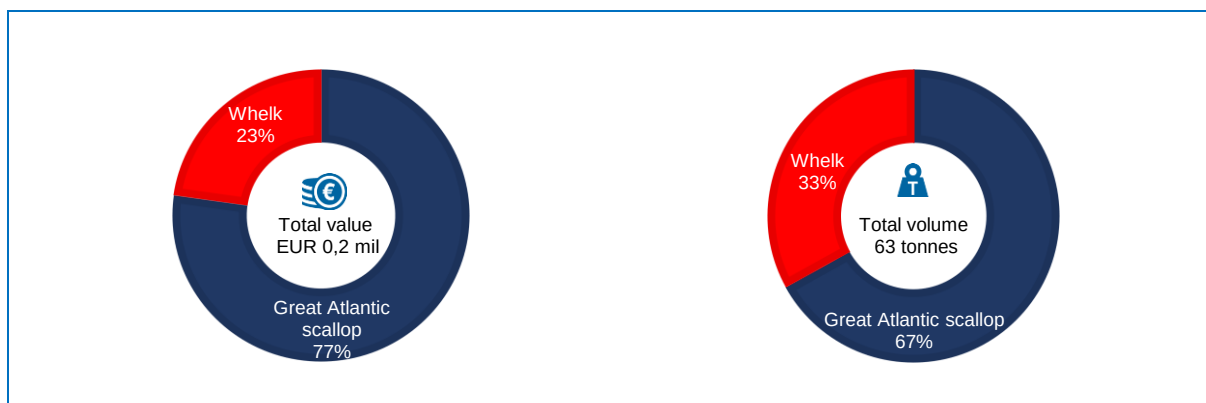
¹¹ <http://www.fao.org/fishery/species/3516/en>

¹² Regulation (EU) 2019/1241 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32019R1241>

¹³ REGULATION (EU) 2015/812 <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=celex%3A32015R0812>

¹⁴ <https://www.eumofa.eu/the-eu-fish-market>

Figure 27. **FIRST SALES: COMPARISON OF BIVALVES (ERS) IN BELGIUM, VALUE AND VOLUME, NOVEMBER 2019**



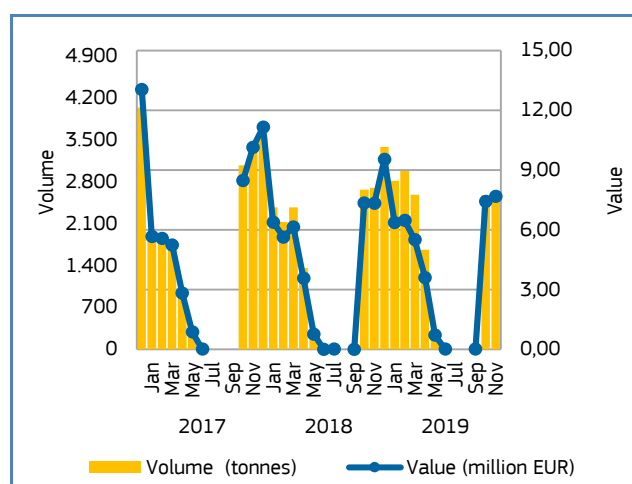
Source: EUMOFA (updated 16.01.2020).

In **France** in January–November 2019, first sales of great Atlantic scallop increased by 2% in value and by 11% in volume compared to the same period in 2018. Compared with January–November 2017, first-sales value decreased by 3%, while volume grew by 18%. This was due to a deflation of the average first-sales price by 17%. There is a fishing closure period which last from 15 May to 30 September¹⁵.

Of bivalves sold in November 2019, great Atlantic scallop accounted for 88% of total first-sales value and 86% of volume.

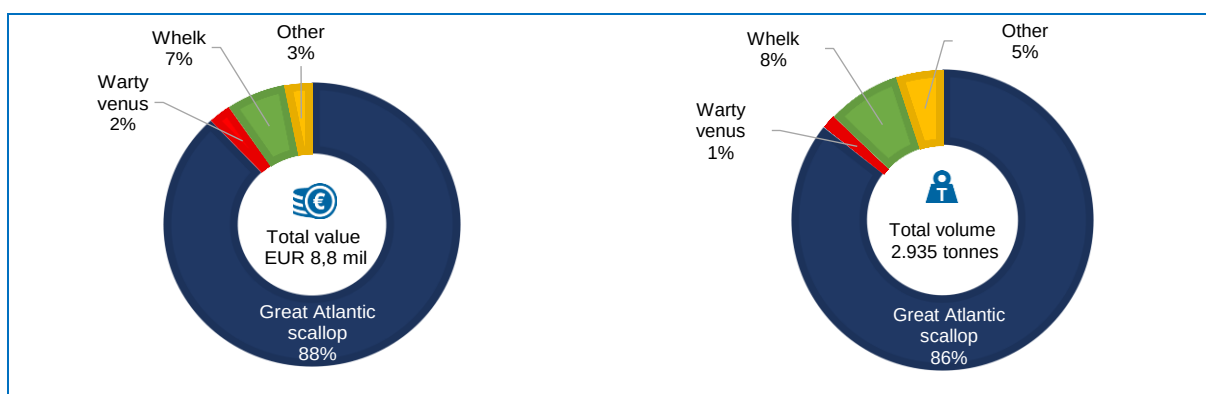
Dieppe, Port-en-Bessin, and Saint-Quay-Portrieux in the English Channel are the fishing ports that registered the highest first-sales value from January to November 2019.

Figure 28. **GREAT ATLANTIC SCALLOP: FIRST SALES IN FRANCE**



Source: EUMOFA (updated 16.01.2020).

Figure 29. **FIRST SALES: COMPARISON OF BIVALVES (ERS) IN FRANCE, VALUE AND VOLUME, NOVEMBER 2019**



Source: EUMOFA (updated 16.01.2020).

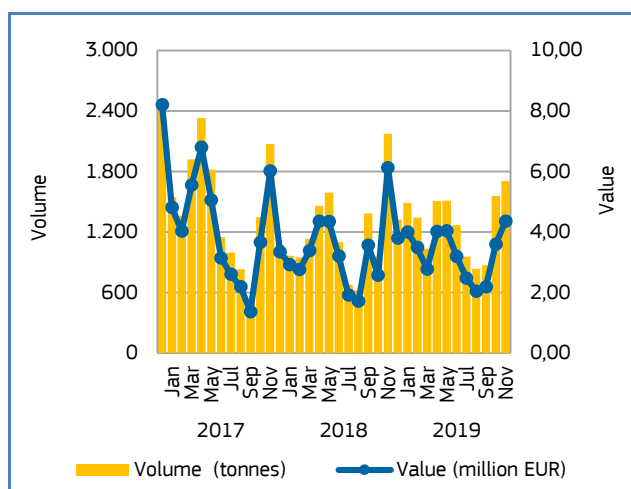
¹⁵ Comité Régional des Pêches Maritimes et des Elevages Marins de Bretagne <http://www.ille-et-vilaine.gouv.fr/content/download/46979/325434/file/220-2019%20CSJ%20Praires%20Huitres%20Rance%2035%202019-2020.pdf>

In the **United Kingdom** in January–November 2019, first sales of great Atlantic scallop decreased by 2% in value and increased by 8% in volume when compared to January–November 2018. Compared with the same period in 2017, first sales fell by 20% in value and 11% in volume.

Of bivalves sold in November 2019, great Atlantic scallop comprised 73% of total first-sales value and 61% of volume.

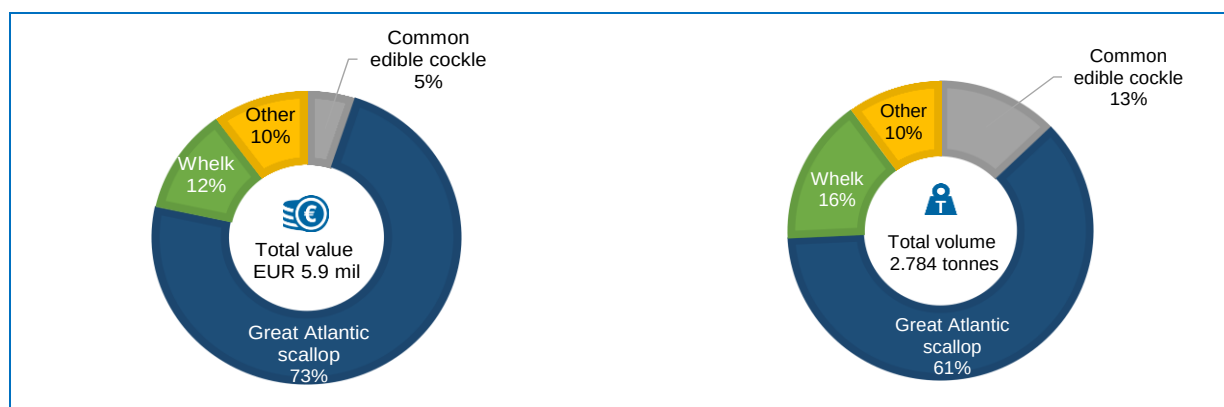
Shoreham-by-Sea, Hartlepool in the North Sea and Plymouth in the English Channel were the fishing ports with the highest first sales activities during January–November 2019.

Figure 30. **GREAT ATLANTIC SCALLOP: FIRST SALES IN THE UK**



Source: EUMOFA (updated 16.01.2020).

Figure 31. **FIRST SALES: COMPARISON OF BIVALVES (ERS) IN THE UK, VALUE AND VOLUME, NOVEMBER 2019**





Price trends

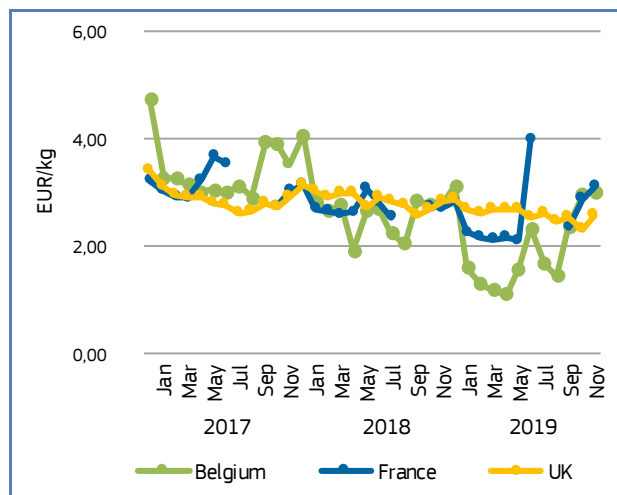
Over the past 36 months (December 2016–November 2019), the highest average price of great Atlantic scallop among the selected countries was recorded in the UK (2,78 EUR/kg), 1% higher than in France (2,76 EUR/kg), and 3% more than in Belgium (2,69 EUR/kg).

In **Belgium** in November 2019, the price at 3,01 EUR/kg was 7% higher compared to November 2018, and 14% lower compared to November 2017. The lowest price was observed in April 2019 (at 1,10 EUR/kg for 31 tonnes), whereas the highest was recorded in December 2016 (at 4,73 EUR/kg for 23 tonnes). The peak season for the great Atlantic scallop fishery is in winter (January–March), while the low season is in summer (June–August).

In **France** in November 2019, the average price of great Atlantic scallop was 3,11 EUR/kg, an increase of 15% compared to November 2018, and 2% compared to November 2017. The lowest price was recorded in May 2019 at 2,10 EUR/kg for 336 tonnes. Excluding the June 2019 price of 4,00 EUR/kg for a non-representative volume of 84 kg, the highest price was observed in May 2017 at 3,67 EUR/kg for 235 tonnes.

In **the UK**, the average price of great Atlantic scallop in November 2019 was 2,55 EUR/kg, 9% lower than the price in November 2018, and 12% lower than the price in November 2017. Over the past 36 months, first-sales price was the lowest in October 2019 when 1.559 tonnes of scallop were sold for 2,31 EUR/kg. The highest price was observed in December 2016 at 3,38 EUR/kg for 2.429 tonnes, when the scallop supply was at its highest point within the past 36 months.

Figure 32. **GREAT ATLANTIC SCALLOP: FIRST-SALES PRICE IN SELECTED COUNTRIES**



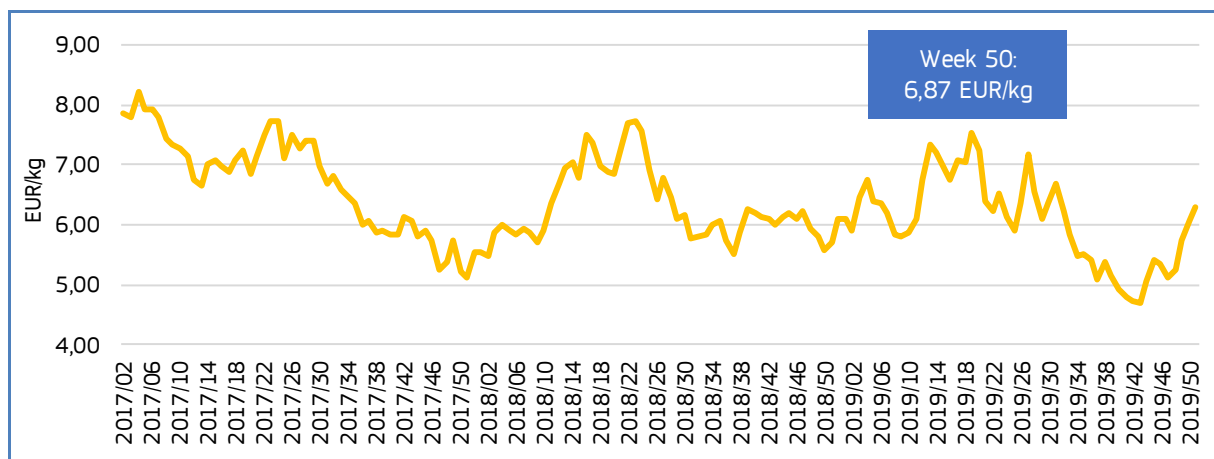
Source: EUMOFA (updated 16.01.2020).

2. Extra-EU imports

Each month, weekly extra-EU import prices (average values per week, in EUR per kg) are examined for nine species. Every month, the three species that are the most relevant in terms of value and volume are examined: fresh whole Atlantic salmon from Norway, frozen Alaska pollock fillets from China, 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, bivalves and other molluscs), and three are randomly selected. This month, the featured commodity species are fresh or chilled scallops from the USA, frozen mussels from New Zealand and prepared or preserved clams, cockles and ark shells from Vietnam. The remaining randomly selected species include fresh or chilled yellowfin tuna from the Maldives, fresh or chilled monkfish from Norway, and fresh or chilled lesser or Greenland halibut from Greenland.

The weekly price of **fresh, whole Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway** reached 6,87 EUR/kg in **week 50** (commencing 9th December). This price increased by 13% from both the preceding four-week average (6,11 EUR/kg) and from the previous year (6,10 EUR/kg). The price for fresh, whole Atlantic salmon was 8% higher than the previous week, corresponding to a 11% increase in volume. Imports in week 50 totalled 16.423 tonnes, 10% higher than the average volume of the previous four weeks, and down by 13% from the previous year.

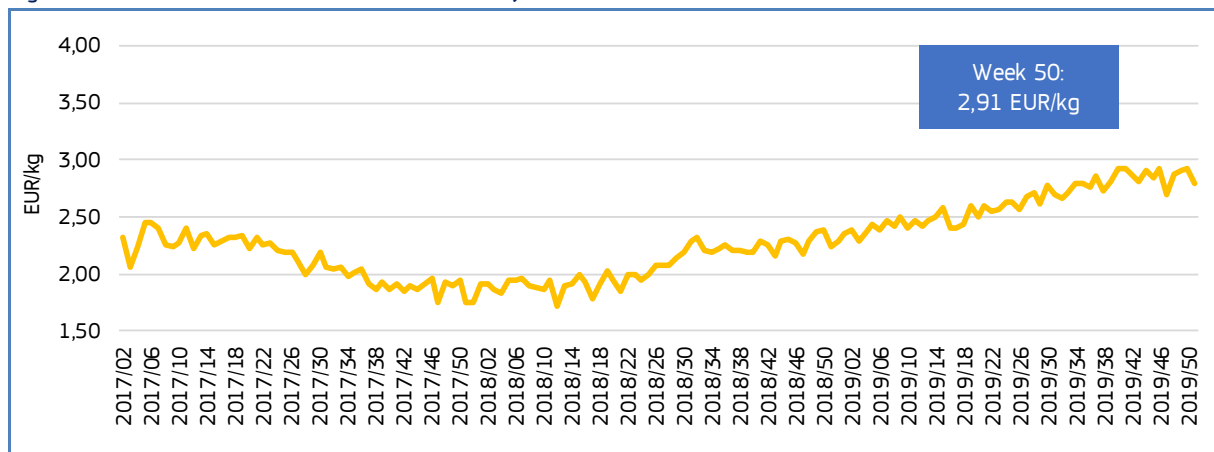
Figure 33. **IMPORT PRICE OF ATLANTIC SALMON, FRESH AND WHOLE FROM NORWAY**



Source: European Commission (updated 16.01.2020).

For **frozen fillets of Alaska pollock** (*Theragra chalcogramma*, CN code 03047500) imported from **China**, the price in **week 50** was 2,91 EUR/kg, 2% higher than the preceding four-week average (2,87 EUR/kg), and 24% higher than the same week in 2018 (2,35 EUR/kg). Volume totalled 4.406 tonnes, greater than the average of the previous four weeks, and higher than the same week in 2018 (+26% and +39%, respectively). In 2019, the price of Alaska pollock increased, while volume exhibited a slight decreasing trend.

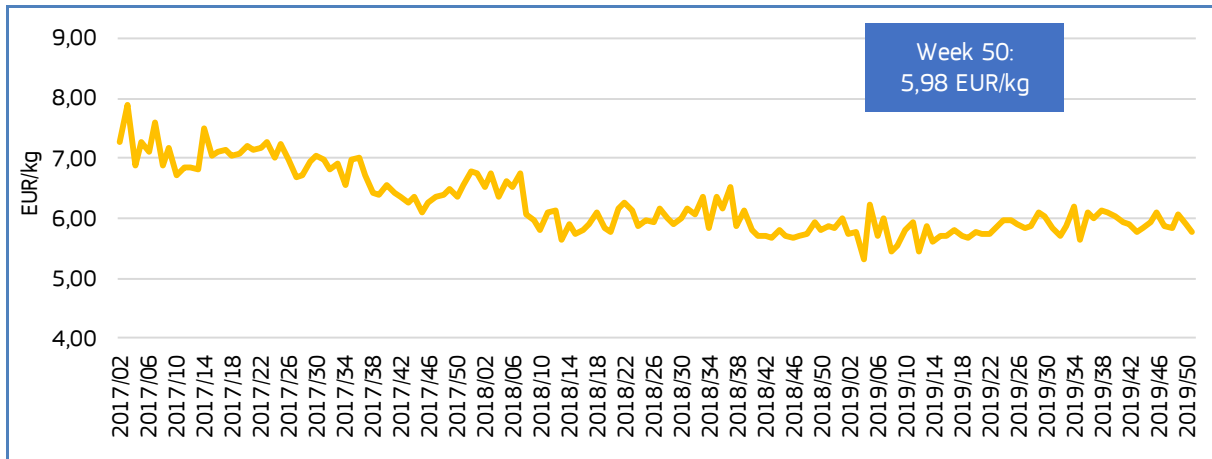
Figure 34. **IMPORT PRICE OF ALASKA POLLOCK, FROZEN FILLETS FROM CHINA**



Source: European Commission (updated 16.01.2020).

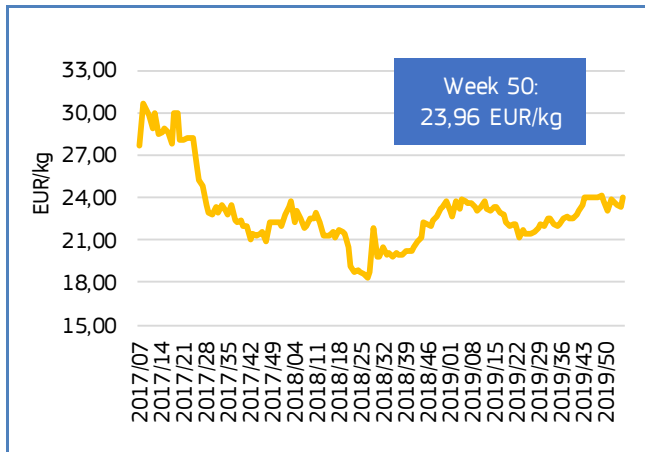
The price of **frozen tropical shrimp** (genus *Penaeus*, CN code 03061792) from **Ecuador** was 5,98 EUR/kg in **week 50**. This was slightly higher (+1%) than the average of the preceding four weeks (5,93 EUR/kg), and almost unchanged from the same week in 2018 (6,00 EUR/kg). The volume in week 50 (1.678 tonnes) was 12% lower than the previous four-week average, and was significantly higher (+37%), than the same week in 2018. In 2019, both price and volume increased. At the same time, this product experienced high fluctuations in supply (e.g. from 900 to 2.700 tonnes).

Figure 35. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR**



Source: European Commission (updated 16.01.2020).

Figure 36. **IMPORT PRICE OF LIVE, FRESH OR CHILLED SCALLOPS, INCLUDING QUEEN SCALLOPS FROM THE USA**

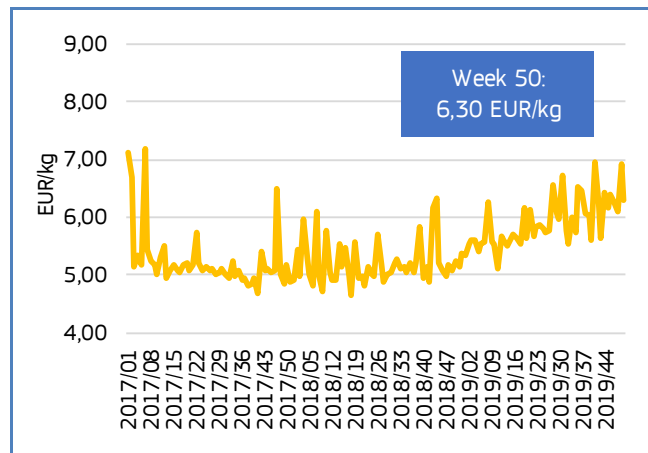


Source: European Commission (updated 16.01.2020).

The price of **live, fresh or chilled scallops, including queen scallops** (of the genera *Pecten*, *Chlamys* or *Placopecten*, CN code 03072100) imported from the **USA**, was 23,96 EUR/kg in **week 50**. This was higher than the average of the previous four weeks, and higher than the same week in 2018 (+1% and +4%, respectively). The volume recorded in week 50 (8,5 tonnes) was 15% higher than the preceding four-week average, and 20% lower than the same week in 2018. Prices for this product fluctuate and are not necessarily connected with supply. They tend to rise in the end of the year, during the Christmas season. The highest prices recorded in week 2 and 3 of 2017 (30,66 and 30,37 EUR/kg, respectively) do not correspond to the lowest volumes, which were recorded in week 26 of 2018 and week 3 of 2017 (2,8 and 3,0 tonnes, respectively). In 2019, both price and volume followed a decreasing trend, the latter at a slower pace. France is the EU's most significant importer of this product.

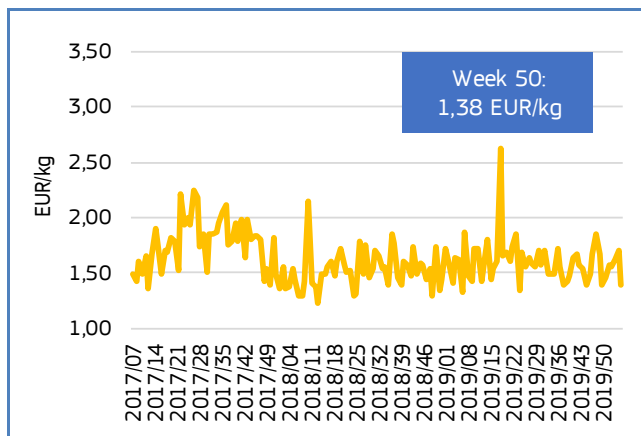
The price of **frozen mussels** (*Perna* spp., CN code 03073290) from **New Zealand** was 6,30 EUR/kg in **week 50**, down by 2% from the preceding four-week average (6,41 EUR/kg) and 20% up from the price in week 50 of the previous year (5,24 EUR/kg). The volume recorded in week 50 (27,7 tonnes) was significantly lower than the preceding four-week average and from the same week in 2018 (-69% and -70%, respectively). On average, prices are in the range of 5 to 6 EUR/kg. The price peaks observed in weeks 1 and 6 of 2017 (7,11 EUR/kg and 7,18 EUR/kg, respectively) are not related to lowest volumes (0,36 tonnes in week 36 of 2018 and 2,9 tonnes in week 11 of 2019). In the period observed (2017/1–2019/50) prices increased, while volume experienced an opposite trend. Portugal and Spain are the biggest EU importers of frozen mussels from New Zealand.

Figure 37. **IMPORT PRICE OF FROZEN MUSSELS FROM NEW ZEALAND**



Source: European Commission (updated 16.01.2020).

Figure 38. **IMPORT PRICE OF PREPARED OR PRESERVED CLAMS, COCKLES AND ARK SHELLS FROM VIETNAM**

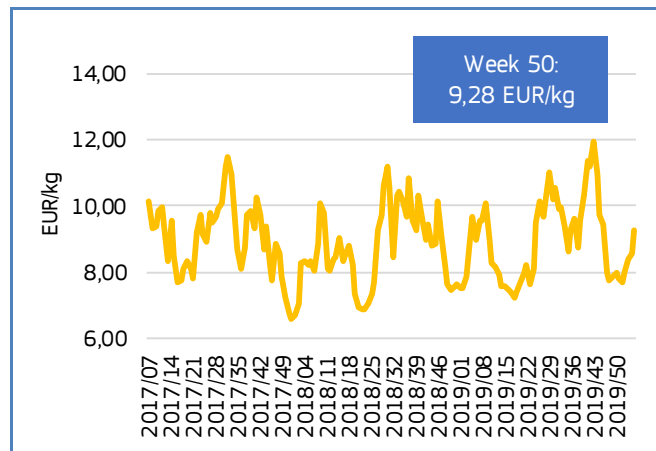


Source: European Commission (updated 16.01.2020).

For **prepared or preserved clams, cockles and ark shells**, (CN code 16055600) from **Vietnam**, the price in **week 50** (1,38 EUR/kg) was 14% down from the preceding four-week average (1,61 EUR/kg), and 15% lower than the previous year (1,63 EUR/kg). In the course of 2019, average prices have decreased slightly, while volume experienced an opposite trend. The volume of 352 tonnes in week 50 was significantly lower than both the four-week average (652 tonnes, -46%), and the volume a year earlier (477 tonnes, -26%). Portugal, Spain and Italy are the EU's largest importers of this product.

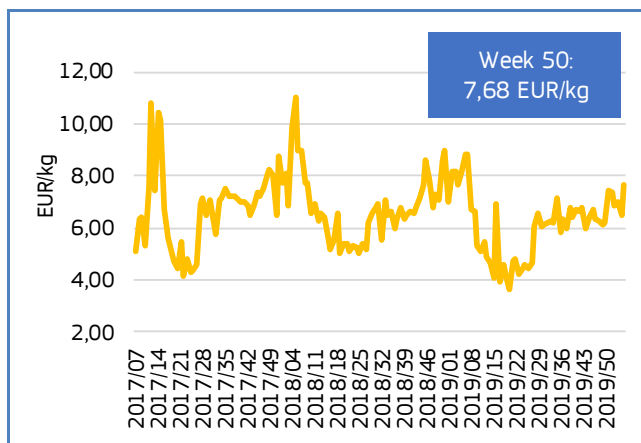
The price of **fresh or chilled yellowfin tunas**, (*Thunnus albacares*, CN code 03023290) from the **Maldives** was 9,28 EUR/kg in **week 50**, a 14% increase from the preceding four-week average of 8,17 EUR/kg, and 2% greater than the price in the same week of 2018 (9,11 EUR/kg). The recorded volume of 30 tonnes was greater than the average of the preceding four weeks, and greater than the volume a year earlier (+6% and +30%, respectively). Prices experienced a stable long-term trend (week 51 of 2016 to week 50 of 2019), while volume has decreased. However, in the course of 2019, prices exhibited a slight increase. Prices are at their highest in the months of June to September and are correlated with the availability of supply, which reflects the seasonality of fisheries. France and Spain are the top importers within the EU.

Figure 39. **IMPORT PRICE OF FRESH OR CHILLED YELLOWFIN TUNAS FROM THE MALDIVES**



Source: European Commission (updated 16.01.2020).

Figure 40. **IMPORT PRICE OF FRESH OR CHILLED MONKFISH FROM NORWAY**

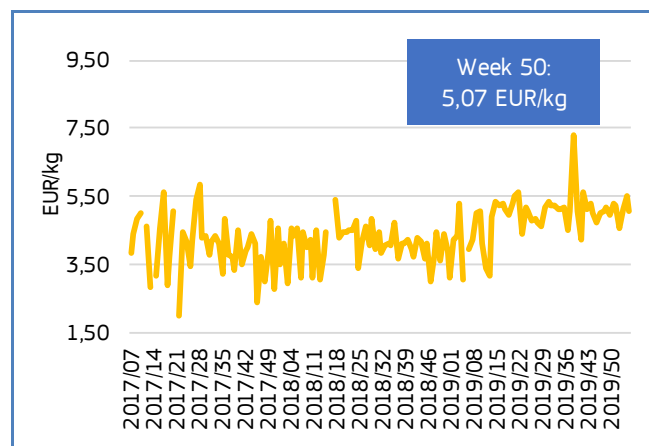


Source: European Commission (updated 16.01.2020).

The price of **fresh or chilled monkfish** (*Lophius* spp., CN code 03028950) from **Norway** reached 7,68 EUR/kg in **week 50**, 11% greater the preceding four-week average (6,92 EUR/kg) and slightly up (+1%) from the price a year earlier (7,62 EUR/kg). The recorded volume of 22 tonnes in week 50 was 28% lower than the preceding four-week average, 6% higher than week 50 of 2018. Prices spike around weeks 51 and 52 of the year, generally correlating with a decrease in supply. Prices experienced a moderate decrease in the observed period (week 52 of 2016 to week 50 of 2019), while volumes showed a sharp increase (from 0,5 tonnes in week 51 of 2016 to 63,5 tonnes in week 37 of 2019). Denmark and Sweden are the EU's top importers.

The price of **fresh or chilled lesser or Greenland halibut** (*Reinhardtius hippoglossoides*, CN code 03033110) from **Greenland** was 5,07 EUR/kg in **week 50**, almost unchanged from the preceding four-week average (5,10 EUR/kg), and 4% down from week 50 of the previous year (5,26 EUR/kg). The recorded volume (2.152 tonnes) was over three times higher than the average of the preceding four weeks. Average prices are in the range 4,00–5,00 EUR/kg and have increased over the observed period. Volume has also increased dramatically (from 0,3 tonnes in week 16 of 2017 to 2.153 tonnes in week 50 of 2019). The spike in price (7,30 EUR/kg in week 33 of 2019) corresponds to a sudden drop of supply. Denmark is the EU's biggest importer.

Figure 41. **IMPORT PRICE OF FROZEN OR CHILLED LESSER OR GREENLAND HALIBUT FROM GREENLAND**



Source: European Commission (updated 16.01.2020).

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In November 2019, the consumption of fresh fisheries and aquaculture products increased in both volume and value in Denmark, Italy, and Sweden, whereas it decreased in Hungary, Ireland, Portugal, and the UK. In France, Germany, the Netherlands, Poland, and Spain, volume decreased while value increased.

The decrease seen in Poland was mainly due to lower consumption of trout and mackerel (-19% and -23%, respectively). The reduced consumption (-44%) of mussels (*Mytilus* spp.) was the main reason for the decrease in the volume of seafood consumed in the Netherlands.

A rise in salmon consumption in Denmark (31% in volume and 37% in value) and Sweden (49% and 40%, respectively) contributed to the overall increase in consumption in those two countries.

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

Country	Per capita consumption 2017* (live weight equivalent, LWE) kg/capita/year	November 2017		November 2018		October 2019		November 2019		Change from November 2018 to November 2019	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	27,0	828	12,58	795	12,57	926	15,48	921	15,44	16%	23%
France	33,7	19.630	206,73	18.123	192,51	18.165	205,07	17.596	198,30	3%	3%
Germany	13,4	5.975	76,22	5.139	64,25	5.070	72,66	5.056	68,31	2%	6%
Hungary	5,6	326	1,84	376	2,44	361	1,89	358	1,79	5%	27%
Ireland	23,0	925	13,45	968	13,88	914	13,19	953	13,50	2%	3%
Italy	30,9	25.990	265,83	21.976	226,64	26.238	280,64	24.451	265,92	11%	17%
Netherlands	21,1	2.507	33,89	2.480	34,69	2.641	37,20	2.408	37,53	3%	8%
Poland	15,0	4.922	25,55	4.309	25,84	3.762	24,27	4.112	26,50	5%	3%
Portugal	56,8	4.238	28,08	4.106	28,68	5.709	36,53	4.082	27,22	1%	5%
Spain	45,6	53.104	408,59	51.665	397,70	51.663	402,79	50.471	409,12	2%	3%
Sweden	26,6	709	8,97	548	7,29	1.116	14,17	620	8,29	13%	14%
UK	22,9	4.034	64,49	4.602	70,72	3.442	54,49	4.488	69,57	2%	2%

Source: EUMOFA, based on Europanel (updated 16.01.2020).

*Data on per capita consumption of all fish and seafood products for all EU Member States can be found at: https://eumofa.eu/documents/20178/157549/EN_The+EU+fish+market_2019.pdf

For the past three years, household consumption of fresh fisheries and aquaculture products in the month of November has been above the annual average in both volume and value in only France and Spain. In Denmark, Ireland, Italy, Portugal, and Sweden the opposite was observed. In Hungary and the UK value in November was the same as the annual average, while volume was lower. The Netherlands was the only Member State where volume grew but value remained the same.

The most recent weekly consumption data (up to week 8 of 2020) are available on the EUMOFA website, and can be accessed [here](#).

3.2. Fresh swordfish

Habitat: a pelagic species living primarily in tropical and temperate waters at depths of up to 700 m¹⁶.

Catch area: caught in all oceans, including the Mediterranean Sea, the Sea of Marmara, the Black Sea, and the Sea of Azov¹⁷.

Producing countries in the EU: Spain, Italy, Portugal, Greece, France.

Production method: caught.

Main consumers in the EU: Italy, Spain, Portugal¹⁸.

Presentation: whole, gutted steak/slice, loin.

Preservation: fresh, frozen, skinned.

Means of preparation: grilled, broiled, baked, or poached.



3.2.1. General overview of household consumption in Italy

In 2017, per capita apparent consumption of fisheries and aquaculture products was 30,9 kg in Italy, amongst the highest in the EU. It decreased by 0,6% compared to the previous year. Italian apparent consumption was 27% higher than the EU average apparent consumption per capita (24,3 kg)¹⁹. However, household consumption was 46% lower than in Portugal, which had the highest per capita consumption in the EU at 56,8 kg. See more on per capita apparent consumption in the EU in Table 3.

Household consumption of fresh swordfish in Italy increased in both volume and value over the period January 2016–November 2019. In 2018, volume increased 14% and value increased 1% compared to 2017.

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

First sales: France (1/2015), Greece (7/2015).

Consumption: Italy (3/2015), Spain (3/2015), the UK (3/2015).

Extra-EU Import: Chile (9/2019), China (7/2019).

Topic of the month: Swordfish in the EU (9/2017).

¹⁶ <https://eumofa.eu/documents/20178/108141/MH+9+2017--+final.pdf>

¹⁷ <http://www.fao.org/fishery/species/2503/en>

¹⁸ EUMOFA.

¹⁹ 2017 is the most recent year that data are available.

3.2.2. Consumption trends in Italy

Long-term trend (January 2016 to November 2019): Increasing both in volume and in price.

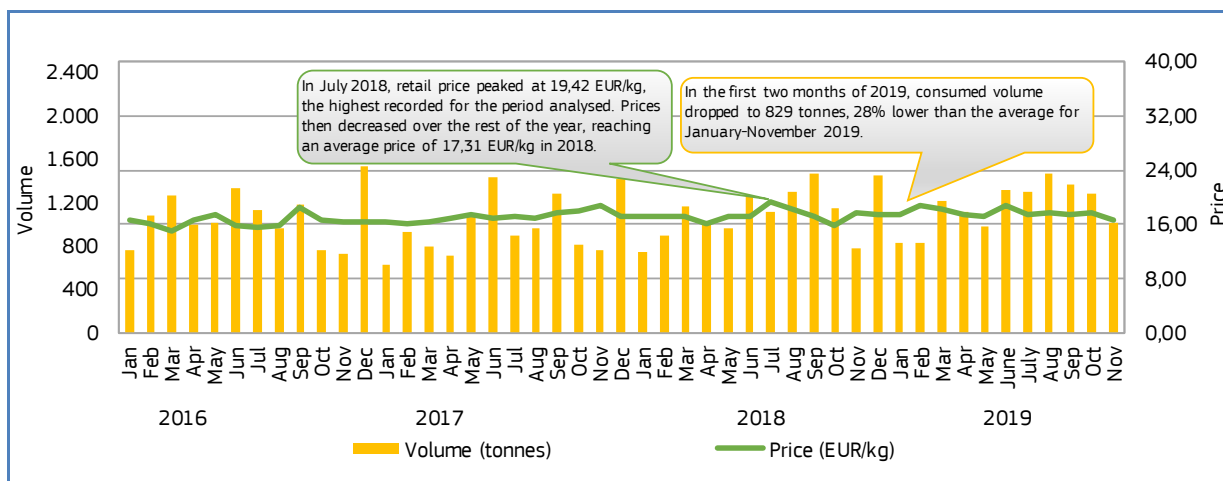
Yearly average price: 16,41 EUR/kg (2016), 17,18 EUR/kg (2017), 17,31 EUR/kg (2018).

Yearly consumption: 12.748 tonnes (2016), 11.677 tonnes (2017), 13.302 tonnes (2018).

Short-term trend (January 2019 to November 2019): Increasing in volume and stable in price.

Average price: 17,71 EUR/kg.

Figure 42. **RETAIL PRICE AND VOLUME OF FRESH SWORDFISH PURCHASED BY HOUSEHOLDS IN ITALY**



Source: EUMOFA, based on Europanel (updated 16.01.2020).

4. Case study – EU TACs and quotas 2020

Catch limitations are amongst the most frequently used management measures for fisheries activities. Many commercial stocks exploited by the EU fishing fleet are managed through Total Allowable Catch (TAC).

These TACs proposals are based on scientific advice provided each year by the International Council for the Exploration of the Seas (ICES). Scientific advice delivered by ICES is dependent on data: only the stocks for which there is sufficient and reliable data can be fully assessed. From this data, estimates of stock size, and a forecast of how they will react to various exploitation scenarios, are produced. Where sufficient data are available, scientific bodies are able to provide advice of the adjustments to fishing opportunities needed for fish stocks to produce their Maximum Sustainable Yield (MSY)²⁰. The advice is then referred to as "MSY advice". In other instances, scientific bodies rely on a precautionary approach to make recommendations regarding what an appropriate level of fishing would be. TACs are shared between EU countries in the form of national quotas. To divide the quotas for each stock amongst EU countries, each Member State is allocated a set percentage, based on historical catch. This fixed percentage is known as the "relative stability key". EU countries can exchange quotas with other EU countries.

In 2020, the main TAC changes compared to 2019 are: reductions for cod, hake, saithe, anglerfish, herring, sprat, and plaice and increases for haddock, mackerel, and sole.

4.1. The North-East Atlantic and North Sea

In December 2019, the Council reached a political agreement on regulations concerning the 2020 catch limits for over 150 fish stocks in the Atlantic, the North Sea and international fisheries in which EU vessels participate²¹.

This agreement contains fishing opportunities that the EU establishes autonomously. However, it also features fishing opportunities resulting from multilateral or bilateral fisheries consultations. The outcome is implemented by providing for internal allocation among Member States on the principle of relative stability.

Thus, aside from autonomous EU stocks, the TAC proposal covers:

- Shared stocks, i.e. stocks that are jointly managed with Norway in the North Sea and Skagerrak, with the Faroe Islands, or in the framework of the Coastal State consultations (Norway and the Faroe Islands).
- Fishing opportunities resulting from agreements reached within the framework of the Regional Fisheries Management Organisations (RFMOs), such as the North East Atlantic Fisheries Commission (NEAFC).

²⁰ Fishing at MSY levels means catching the maximum proportion of a fish stock, that can safely be removed from the stock while, at the same time, maintaining its capacity to produce maximum sustainable returns, in the long term.

²¹ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32020R0123&from=EN>

Table 4. **2020 EU MAIN TAC (above 1.000 tonnes and with variations against 2020 above 10%) IN THE NORTHEAST ATLANTIC FOR GROUND FISH SPECIES (volume in tonnes)**

Species	ICES Area	Stock	2019	2020	Variation 2019/2020
Anglerfish	EU waters within IIa and IV	ANF2AC4-C	20.237	14.085	-30%
	EU and international waters within Vb; international waters of XII and XIV	ANF56-14	11.453	7.971	-30%
Cod	IV, EU waters within IIa, the part of IIIa not covered by the Skagerrak and Kattegat	COD2A3AX4	24.433	12.216	-50%
	NAFO 3M	CODN3M	9.980	4.865	-51%
	Skagerrak	COD03AN	4.069	2.035	-50%
	VIa, EU & international waters within Vb east of 12°00'W	COD5BE6A	1.735	1.279	-26%
European hake	VI, VII; EU and international Waters within Vb; international waters of XII, XIV	HKE571214	79.762	63.325	-20%
	VIIIa-b, VIII d-e	HKE8ABDE	52.118	42.235	-19%
	EU waters within IIa and IV	HKE2AC4-C	4.994	3.940	-21%
	IIIa; EU waters within subdivisions 22-32	HKE03A	4.286	3.403	-20%
Haddock	IV, EU waters within IIa	HAD2AC4	22.591	27.753	+23%
	VIIb-k, VIII, IX, X; EU waters within CECAF 34.1.1	HAD7X7A34	8.329	10.859	+30%
	EU and international water within Vb, VIa	HAD5BC6A	3.226	3.973	+23%
	VIIa	HAD07A	3.739	3.156	-16%
	IIIa, EU waters within 22-32	HAD03A	1.706	2.101	+23%
Saithe	IIIa and IV; EU waters within IIa,b,c,d	POK2C3A4	58.524	38.110	-35%
	VI; EU and international waters within Vb, XII and XIV	POK56-14	11.753	7.340	-38%
Whiting	IV; EU waters within IIa	WHG2AC4	10.554	15.382	+46%
	VIIb-h, and VIIj-k	WHG7X7A-C	19.184	10.863	-43%

Source: EUMOFA based on European Commission and Regulation (EU) 2020/123.
Variations above 40% between 2019 and 2020 are highlighted in bold.

Small pelagics

For selected small pelagic stocks, the main changes relative to 2019 EU TACs are:

- Significant decrease for **herring** in the Barents Sea, the Norwegian Sea (-20%), and in Skagerrak and Kattegat (-16%). However, TAC is stable for the two main stocks: Northern and Central North Sea, and Southern North Sea and Eastern English Channel.
- Significant increase of **mackerel** TAC in the North East Atlantic, with an overall increase of 30%.
- Drastic reduction of **sprat** TAC in Skagerrak and Kattegat (-50%) and in the Eastern and Western English Channel (-43%).
- Significant decrease of **jack and horse mackerel** TACs: -41% in the Bay of Biscay and in the North East Atlantic.

Table 5. **2020 EU MAIN TAC (above 1.000 tonnes and with variations against 2020 above 10%) IN THE NORTHEAST ATLANTIC FOR SMALL PELAGIC SPECIES (volume in tonnes)**

Species	ICES Area	Stock	2019	2020	Variation 2019/2020
Atlantic herring	EU and International waters within I and II	HER1/2-	42.815	34.216	-20%
	IIIa	HER03A	25.415	21.257	-16%
	bycatch in IV, VIId and in EU waters within IIa	HER2A47DX	13.190	8.954	-32%
	VIIa	HER07A/MM	6.896	8.064	+17%
	EU and international waters within Vb and VIb and VIaN	HER5B6ANB	4.170	3.480	-17%
	VIaS, VIIb-c	HER6AS7BC	1.630	1.360	-17%
Atlantic mackerel	VI, VII, VIII a-b, VIId-e; EU and international waters within Vb; International waters within IIa, XII, XIV	MAC2CX14-	260 813	368.031	+41%
	VIIIc, IX, X; EU waters within CECAF 34.1.1	MAC8C3411	29.844	42.112	+41%
	IIIa and IV; EU waters within IIa, IIIb-c and Subdivisions 22-32	MAC2A34	23.296	32.022	+37%
	Norwegian waters within IIa and IVa	MAC2A4A-N	10.242	14.453	+41%
European sprat	IIIa	SPR03A	24.627	12.314	-50%
	VIId-e	SPR7DE	2.637	1.506	-43%
Greater silver smelt	EU and international Waters within V, VI, VII	ARU567	4.661	3.729	-20%
	IX	JAX09	94.017	116.871	+24%
Jack and horse mackerels	EU waters within IIa, IVa, VI, VIIa-c, VIIe-k, VIIla,b,d,e; Vb; EU and international waters within Vb; international waters within XII & XIV	JAX2A-14	117.518	69.017	-41%
	VIIIc	JAX/08C.	18.858	11.179	-41%
	EU waters within IVb, IVc, VIId	JAX4BC7D	12.629	11.213	-11%

Source: EUMOFA based on European Commission and Regulation (EU) 2020/123.
Variations above 40% between 2019 and 2020 are highlighted in bold.

Flatfish

Among selected flatfish stocks, the main changes relative to 2019 EU TACs are:

- Significant increase for **common sole** in the North Sea and the Norwegian Sea (+40%).
- Significant reduction of **plaice** TAC in the Eastern and Western English Channel (-12%) and in Kattegat (-33%). However, there are no significant variations for the two main stocks which represent 106.383 tonnes in total for the EU share: North Sea and Eastern Arctic (-3%) and Skagerrak (+1%).
- Important decrease of **turbot** and **brill** TAC in the North Sea and the Norwegian Sea (-20%).

Table 6. **2020 EU MAIN TAC (above 1.000 tonnes and with variations against 2020 above 10%) IN THE NORTHEAST ATLANTIC FOR FLATFISH SPECIES (volume in tonnes)**

Species	ICES Area	Stock	2019	2020	Variation 2019/2020
Common sole	EU waters within IIa and IV	SOL24-C	12.545	17.535	+40%
	VII f, g	SOL7FG	1.009	1.652	+63%
	VII e	SOL07E	1.242	1.478	+19%
European plaice	VII d, e	PLE7DE	10.354	9.154	-12%
	VII f, g	PLE7FG	1.662	2.003	+21%
	Kattegat	PLE03AS	1.705	1.141	-33%
Megrim	VIII c, IX & X; EU waters within CECAF 34.1.1	LEZ8C3411	1.872	2.322	+24%
Turbot and brill	EU waters within IIa and IV	T/B2AC4-C	8.122	6.498	-20%

Source: EUMOFA based on European Commission and Regulation (EU) 2020/123.
Variations above 40% between 2019 and 2020 are highlighted in bold.

Crustaceans

For selected crustacean stocks, the main changes relative to 2019 EU TACs are:

- Significant decrease of **Norway lobster** in the Irish Sea and the Celtic Sea (-15%) partly compensated for by slight increases in the North Sea (+4%) and West Scotland (+5%).
- Significant increase of **northern prawn** TAC in Skagerrak and Kattegat (+37%).
- Substantial increase of **northern prawn** TAC in waters off Eastern Greenland (+48%), the Norwegian Sea and the North Sea (-23%).

Table 7. **2020 EU MAIN TAC IN THE NORTHEAST ATLANTIC FOR CRUSTACEANS SPECIES (volume in tonnes)**

Species	ICES Area	Stock	2019	2020	Variation 2019/2020
Norway lobster	EU waters within IIa and IV	NEP2AC4-C	22.103	23.002	+4%
	VII	NEP07	19.784	16.815	-15%
	VI, EU and international waters within Vb	NEP5BC6	15.092	15.899	+5%
Northern prawn	IIIa	PRA03A	1.723	2.365	+37%
	Greenland waters within V and XIV	PRA514GRN	1.350	2.000	+48%
	EU waters within IIa and IV	PRA2AC4-C	1.566	1.200	-23%

Source: EUMOFA based on European Commission and Regulation (EU) 2020/123.
Variations above 40% between 2019 and 2020 are highlighted in bold.

Tuna and tuna-like species

TAC and quotas for these species are determined by The International Commission for the Conservation of Atlantic Tunas (ICCAT). Within stocks of selected tuna and tuna-like species, the main changes relative to 2019 EU TACs are a slight decrease for **albacore tuna** and **bigeye tuna** in the Atlantic (-9%), and a slight increase for **bluefin tuna** in the East Atlantic – including the Mediterranean (+10%) – and for **swordfish** in the Atlantic (+4%).

Table 8. **2020 EU MAIN TAC IN THE NORTHEAST ATLANTIC FOR TUNA AND TUNA-LIKE SPECIES (volume in tonnes)**

Species	ICES Area	Stock	2019	2020	Variation 2019/2020
Albacore tuna	Atlantic Ocean, North of 5° N	ALBAN05N	29.537	26.869	-9%
Bluefin tuna	Atlantic Ocean, east of 45° W, and Mediterranean	BFTAE45WM	17.536	19.360	10%
Bigeye tuna	Atlantic Ocean	BETATLANT	17.158	15.543	-9%
Swordfish	Atlantic Ocean, North of 5° N	SWOAN05N	7.386	7.685	4%

Source: EUMOFA based on European Commission and Regulation (EU) 2020/123.

4.2. Baltic Sea

In October 2019, the Council reached an agreement on the 2020 TACs in the Baltic Sea and followed the Commission's proposal to decrease the Total Allowable Catches (TAC) for eight of the ten most commercially important fish stocks in the basin²².

The main reduction of fishing opportunities concerns cod, for which combined TAC has experienced an 83% decrease. The TAC for herring, sprat and plaice in the Northern Baltic have also been significantly reduced (-27%, -22% and -32%, respectively).

Table 9. **2020 EU TAC IN THE BALTIC SEA (volume in tonnes)**

Species	ICES Area	TAC 2020	Variation against 2019
Herring	Subdivisions 30-31	65.018	-27%
	Subdivisions 22-24	3.150	-65%
	Union waters within Subdivisions 25-27, 28.2, 29 and 32	153.384	-10%
	Subdivision 28.1	34.445	+11%
Cod	Union waters within Subdivisions 25-32	2.000	-92%
	Subdivisions 22-24	3.806	-60%
Plaice	Union waters within Subdivisions 22-32	6.894	-32%
Atlantic salmon	Union waters within Subdivisions 22-31	86.575	-5%
	Union waters within Subdivision 32	9.703	0%
Sprat	Union Waters within Subdivisions 22-32	210.147	-22%

Source: European Commission, Regulation (EU) 2019/1838.

Variations above 40% between 2019 and 2020 are highlighted in bold.

²² <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R1838&from=EN>

4.3. Mediterranean and Black Seas

On December 16th 2019, the Council adopted a regulation setting the 2020 catch limits for certain fish stocks in the Mediterranean and Black Seas²³.

This is the first time that a standalone fishing opportunities regulation for both the Mediterranean and Black Seas has been adopted, following the 2019 implementation of the Multiannual Plan for Demersal Stocks in the Western Mediterranean Sea (WMMAP).

The adopted rules include:

- Maximum allowable fishing efforts, expressed in number of days, for certain fish stocks in the Western Mediterranean. These fishing efforts were set at a level 10% lower than the WMMAP baseline, and apply to Spain, France and Italy.
- Fishing opportunities and other measures determined in the framework of the General Fisheries Commission for the Mediterranean (GFCM). These measures include a closure period for European eel in the entire Mediterranean Sea, and catch and effort limits for small pelagic stocks in the Adriatic Sea²⁴.
- An autonomous quota for sprat in the Black Sea applicable to Bulgaria and Romania was set at a level needed to maintain the current rate of fishing mortality. The fishing opportunity for turbot in the Black Sea was decided in the GFCM.

Table 10. **FISHING OPPORTUNITIES FOR EU VESSELS IN THE BLACK SEA IN 2020 (volume in tonnes)**

Country	Sprat (<i>Sprattus sprattus</i>)	Turbot (<i>Psetta maxima</i>)
Bulgaria	8.032,5	75
Romania	3.442,5	75
Total EU	11.475	150²⁵
TAC	Not relevant / not agreed	857

Source: European Commission, Regulation (EU) 2019/2236.

However, according to Eurostat, current catches for these species and countries are below the following limits:

- Catches of sprat in the Mediterranean and Black Seas by Bulgarian and Romanian fishing fleets reached 3.232 and 113 tonnes in 2018, respectively. They have followed a rather declining trend over the 2009-2018 period.
- Catches of turbot in the Mediterranean and Black Seas by Bulgarian and Romanian fishing fleets reached 56 and 58 tonnes in 2018, respectively. They have increased over the 2009-2018 period.

²³<https://www.consilium.europa.eu/en/press/press-releases/2019/12/16/council-greenlights-2020-fishing-opportunities-in-the-mediterranean-and-black-seas/>

²⁴ EU catch for sardine and anchovy in the Adriatic is limited to 101.711 tonnes in 2020. This limit concerns only Italy, Croatia and Slovenia.

²⁵ No fishing activity, including transshipment, retaining on board, landing and first sales shall be permitted from 15 April to 15 June 2020.

5. Global highlights

EU / Norway / Fisheries: The EU and Norway have signed three fisheries arrangements for 2020, making this the largest fishing agreement in the north of Europe. The EU and Norway have agreed on quotas for the fish stocks in the North Sea (cod, haddock, plaice, whiting, herring, and saithe) and Skagerrak (cod, haddock, whiting, plaice, shrimp, herring, and sprat), as well as an exchange of reciprocal fishing possibilities²⁶.

EU / Fisheries / Atlantic / North Sea: In December 2019, the Agriculture and Fisheries Council reached an agreement on a regulation concerning the 2020 catch limits for the 89 main commercial fish stocks in the Atlantic, the North Sea and international fisheries in which EU vessels participate. One decision made was to introduce remedial measures to improve the selectivity of fishing gears and reduce bycatches of cod and whiting stocks in the Celtic Sea and cod in Kattegat. It was decided that the by-catch levels for European seabass in the Northern areas would be increased and additional flexibility in management would be granted²⁷.

EU / Sustainability / Baltic Sea: In December 2019, in order to help fishermen cope with the harmful socioeconomic effects of the severe 2020 fishing restrictions on cod and Western herring in the Baltic Sea, the Council agreed on new rules which will allow for permanent cessation to be used to scrap vessels targeting Baltic cod and Western Baltic herring. It is expected that the new rules will help fishermen adjust to this transition and thus support the recovery of the weak stocks²⁸.



EU / EMFF / Support: The 2018 implementation report of the European Maritime and Fisheries Fund (EMFF) summarises EMFF implementation across EU Member States and sea basins according to specific topics during the period 2014-2018. The report shows that most funding went to data collection on fisheries and aquaculture activities (EUR 362,4 million), which helps improve stock assessments and understanding of the state of these sectors, including socioeconomic conditions²⁹.

Ukraine / Supply / Trade: In January-November 2019, Ukraine produced: 3.530 tonnes of dried fish; 2.910 tonnes of salted herring; 1.790 tonnes of salted fish; 3.595 tonnes of smoked fish; 11.967 tonnes of finished products and canned sardine, sardinella, anchovy, and sprat products; 2.070 tonnes of finished products and canned goods made of other fish; and 3.007 tonnes of caviar of other fish. Ukraine exported 349 tonnes of frozen fish worth EUR 860.000³⁰.

India / Supply / Trade: India's total fish production for 2017-18 is estimated at 12,60 million tonnes, of which nearly 70% is from the inland sector and about 50% of the total production is from aquaculture. Fisheries and aquaculture products account for around 10% of total exports and nearly 20% of agricultural exports and contribute about 0,9% of the GDP and 5,2% to the agricultural gross value added of the country³¹.

The Philippines / Fisheries / Supply: The Philippines' total fisheries production is estimated at 990 thousand tonnes for the third quarter of 2019. This is a volume increase of 1,8% from the previous year's level of 973 thousand tonnes. Milkfish, skipjack, and seaweed were the major species that recorded increases compared with the same period a year ago. On the other hand, species that exhibited decreases in production were round scad, tilapia, tiger prawn, and yellowfin tuna³².

²⁶ https://ec.europa.eu/fisheries/press/eu-and-norway-reach-agreement-fisheries-arrangements-2020_en

²⁷ <https://www.consilium.europa.eu/en/press/press-releases/2019/12/18/2020-fishing-opportunities-in-the-atlantic-north-and-the-mediterranean-seas-council-secures-agreement/>

²⁸ <https://www.consilium.europa.eu/en/press/press-releases/2019/12/16/baltic-cod-and-western-herring-fisheries-council-agrees-negotiating-position/>

²⁹ https://ec.europa.eu/fisheries/press/how-was-eu-funding-put-use_en

³⁰ <https://www.unian.info/economics/10831637-ukraine-boosts-production-of-frozen-sea-fish-by-almost-20-in-jan-nov-2019.html>

³¹ <http://nfdb.gov.in/Fish-and-Fisheries-of-India.htm>

³² <https://psa.gov.ph/fisheries-situationer>

6. Macroeconomic Context

6.1 Marine fuel

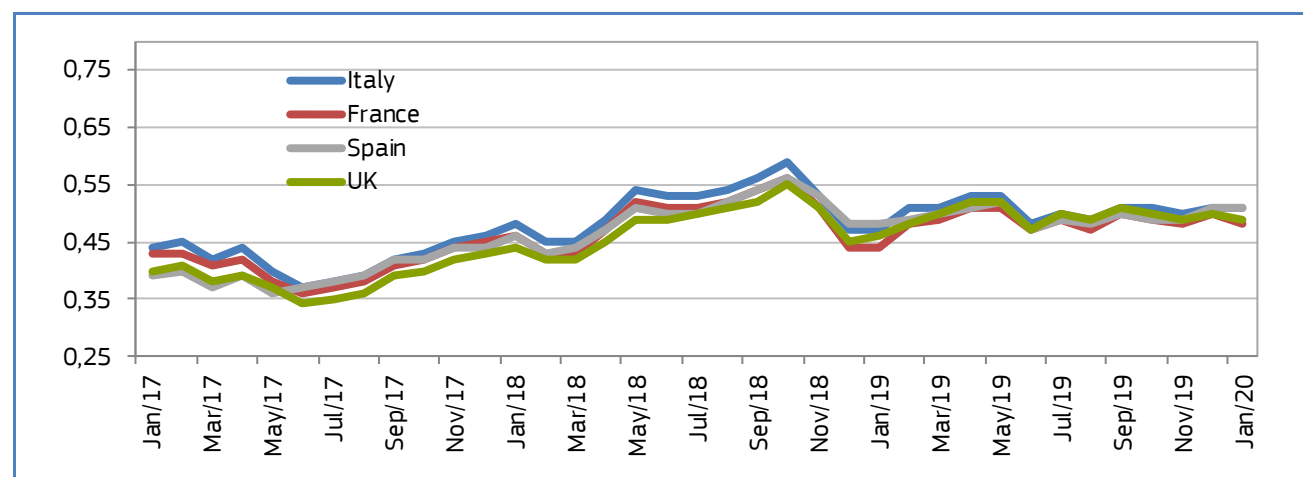
Average prices for marine fuel in **January 2020** ranged between 0,48 and 0,51 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. These prices were about 2% lower compared with the previous month and 8% lower compared with the same month in 2019.

Table 11. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Jan 2020	Change from Dec 2019	Change from Jan 2019
France (ports of Lorient and Boulogne)	0,48	-4%	9%
Italy (ports of Ancona and Livorno)	0,51	0%	9%
Spain (ports of A Coruña and Vigo)	0,51	0%	6%
The UK (ports of Grimsby and Aberdeen)	0,49	-2%	7%

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

Figure 45. **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.

6.2 Consumer prices

The EU annual inflation rate was at 1,6% in December 2019, up from 1,3% in November 2019. It remained unchanged compared with December 2019.

Inflation: lowest rates in December 2019, compared with November 2019.



Inflation: highest rates in December 2019, compared with November 2019.

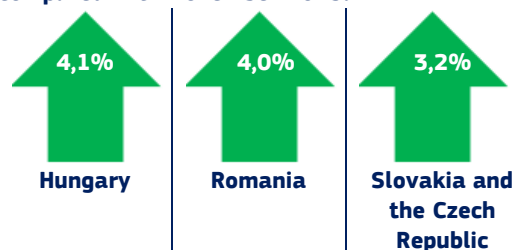


Table 12. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

HICP	Dec 2017	Dec 2018	Nov 2019	Dec 2019	Change from Nov 2019		Change from Dec 2018	
Food and non-alcoholic beverages	101,71	104,73	106,88	107,26	↑	0,4%	↑	2,4%
Fish and seafood	106,56	109,61	111,44	111,59	↑	0,1%	↑	1,8%

Source: Eurostat.

6.3 Exchange rates

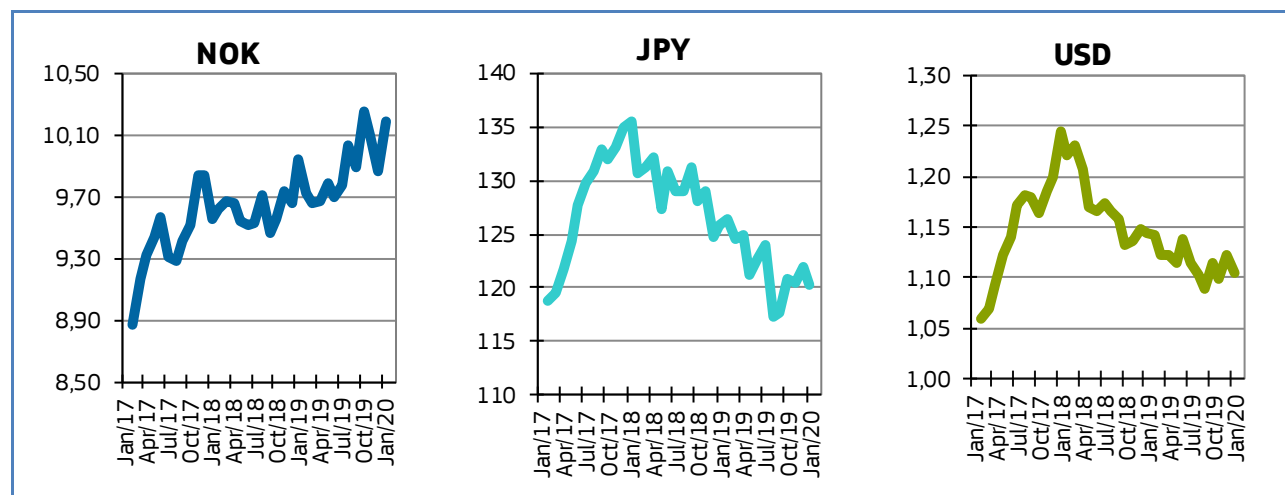
Table 13. **EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Jan 2018	Jan 2019	Dec 2019	Jan 2020
NOK	9,5620	9,6623	9,8638	10,1893
JPY	135,60	124,81	121,94	120,35
USD	1,2457	1,1488	1,1234	1,1052

Source: European Central Bank.

In January 2020, the euro appreciated against the Norwegian krone (+3,3%) from December 2019. However, it depreciated against the Japanese yen (-1,3%) and the US dollar (-1,6%). For the past six months, the euro has fluctuated around 119,72 against the Japanese yen. Compared with January 2020, the euro has depreciated 4,4% against the Japanese yen and 3,5% against the US dollar, but it appreciated 2,4% against the Norwegian krone.

Figure 46. **TREND OF EURO EXCHANGE RATES**



Source: European Central Bank.

Manuscript completed in February 2020

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

First sales: European Council, FAO, marlin.ac.uk, eol.org, species-identification.org.

Consumption: EUROPANEL, FAO.

Case study: EUR-Lex, ICES, European Commission, Eurostat.

Global highlights: DG-Mare European Commission, National Fisheries Development Board (NFDB) of India, Philippine Statistics Authority, UNIAN Information Agency

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].

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

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

The EUMOFA website is publicly available at the following address: www.eumofa.eu.

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