

# Coronavirus response

## EUMOFA's weekly data and trends analysis

### *Bulletin collection*

Fishery and aquaculture are among the sectors most immediately impacted by the crisis. Between April and June 2020, EUMOFA has released a weekly COVID-19 bulletin in order to inform the sector as quickly as possible on the evolution of the markets along the entire value chain, based on the most recent data on first sales, production and trade of fishery and aquaculture products. The data and analyses proposed are accurate to EUMOFA experts' best knowledge, but of course were subject to availability of information in the short-term and to intrinsic volatility of the situation. They do not aim to give complete coverage of the market, and so it is recommended to use them as a mere indication of trends. For more information on species, countries and locations covered, please see [here](#). Starting from July, relevant updates are included in EUMOFA's **"Monthly Highlights"**.

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# Coronavirus response

## EUMOFA's weekly data and trends analysis

### *Weeks 12 and 13*



#### FISHERIES

For EU fisheries, the closure of HORECA channels, and in some places the closure of open markets, led to significant impacts on their activities, especially for small scale fisheries selling fresh fish (sharp drops in terms of volumes and prices). The result was that many vessels stayed at ports and some auctions had to close. After a first chaotic week on the market (week 12) the situation in week 13 shows some positive signs in some MS at first sales level. In some MS, the sector put in place temporary solutions (distance selling, vessel rotation, stopping targeting species for which the demand collapsed, etc.) to minimise impacts on the market, especially to maintain reasonable prices. However, volumes are still significantly low.

[In five of the Danish fish auctions](#) (Hanstholm, Hirtshals, Strandby, Skagen and Grenaa), in week 13, total volumes sold were up by 43% compared to the previous week (week 12). However, the offer is concentrated on a smaller range of species than before the crisis: the number of different species sold was 49 on the Monday before restrictions were imposed (9 March) and only 28 on Monday 30 March.

[In France](#), in week 13, we observe again a strong decrease of volumes but a price increase for many species (compared to week 12) to almost reach week 11 levels (before restriction measures). This is the result of the strategy of many fishery companies, producer organisations and auctions to limit the number of vessels at sea and thus the volumes landed, in order to maintain prices at reasonable levels. Many vessels got out fishing only after having the guarantee to sell their catches (contracts with wholesalers or retailers in particular).

To learn more about the situation on the market, [access to most recent weekly data \(up to week 13 of 2020\) for first sales in Europe](#).



## AQUACULTURE

Reports from the salmon farming industry in Norway (personal communication) indicate that harvesting and sales are proceeding close to normal. Higher than normal volumes are currently being frozen. Spot prices fresh whole (delivered free carrier Oslo) continued down in week 13 by 11%, to 4,54 EUR/kg. Over the last 4 weeks, spot prices have dropped by 38%.



## PROCESSING

In general, the processing industry relying on frozen imports from third countries could experience a shortage in supply in the coming months as processing activities are reduced, there are limitations in freight capacity and some major supplying countries have closed their ports.

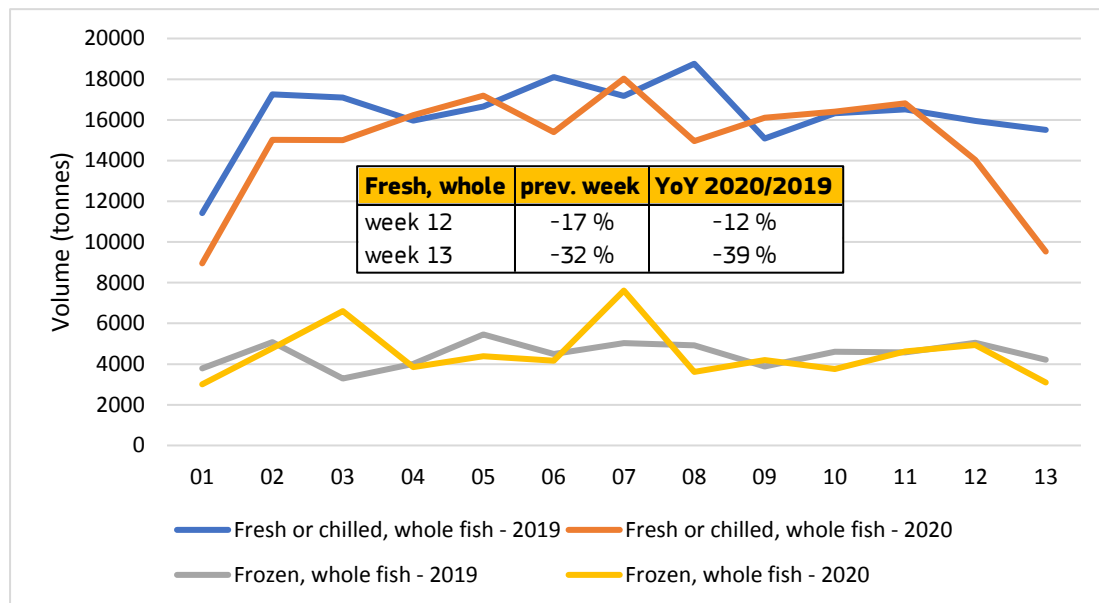


## TRADE -EXTRA EU IMPORTS

By grouping the monitored products by CN4/CN5, we can classify them according to the main chapters of the nomenclature (e.g. 0302 Fresh or chilled whole fish and 0303 frozen whole fish). By analysing these groups, weekly extra-EU imports confirms the general market trends explained in the last two reports with a sharp decrease in the sales of fresh fish.

In week 12, the imported volumes of **fresh or chilled whole fish** decreased by 17% compared to week 11 (down 2.800 tonnes from 16.800) and was down 12% year-on-year (YoY). Five products accounted for 89% of the decrease; Atlantic salmon from Norway (46%), cod from Norway (25%), Redfish from Iceland (7%), Gilthead seabream from Turkey (6%) and haddock from Norway (5%).

In week 13, the imports decreased even more, by 32% compared to the previous week and 39% YoY. In week 13, the import of fresh whole fish decreased by 4.500 tonnes to 9.500. Five products accounted for 97% of the decrease; Atlantic salmon from Norway (65%), cod from Norway (14%), Gilthead seabream and European seabass from Turkey (8% and 6% respectively) and haddock from Norway (5%).



Although the volumes are much lower, the imports have decreased substantially for typical “restaurant species”:

- **Atlantic halibut** from Norway decreased by 66% and 55% in week 12 and 13 respectively. From an imported volume of 33,6 tonnes in week 11 to 5 tonnes in week 13.
- **Yellowfin tuna** from the Maldives decreased by 92% and 88% in weeks 12 and 13 compared to the previous weeks. The imported volume in weeks 11, 12 and 13 was 16,2 tonnes, 1,4 tonnes and 0,2 tonnes respectively.
- **Turbot** from Norway decreased 9% and 86% in week 12 and 13 from 3,8 tonnes in week 11 to only 15 kg in week 13.

During week 13, the NOK appreciated against EUR and USD and recovered some of the depreciation of the past weeks but is still weak. The ISK recovered a bit against EUR at the end of week 12 and beginning of week 13 before further depreciation back to about 154 ISK/EUR. The Russian Rouble has depreciated further to about 88 RUB/EUR.

To learn more about the situation on the market, [you can access most recent weekly data \(up to week 12 of 2020\) for extra EU imports in Europe](#)

# Coronavirus response

## EUMOFA's weekly data and trends analysis

### Week 14



#### FISHERIES

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#### STILL LOW VOLUMES BUT DEMAND AND PRICES SHOW A POSITIVE TREND<sup>1</sup>

The fishery sector is still struggling without the European HORECA market and limited airfreight capacity for exports. In general, lower landing volumes led to some positive trends in first sales prices in week 14 compared to the previous week, but overall the prices are lower than normal.

In **Spain**, during the first 3 weeks of containment (14<sup>th</sup> of March to 4<sup>th</sup> of April), [first sales in Galician auctions](#) decreased by 32% in volume and 64% in value, after a sharp drop of prices especially in the first week. In addition, the Spanish longliners targeting tuna, swordfish and shark have lost 90% of their outlet with the closure of the HORECA segment. Blue shark prices dropped by 34%, swordfish prices by 29%, shark prices by 54% and tuna prices by 44%. Fishermen's intention is to carry on fishing because wages have been paid in advance for the next fishing campaigns. [One important issue is the limited stocking capacity of fishermen, retailers and transformers lacking freezing capacities.](#)

In **France**, a share of small-scale fishing vessels continue to go out at sea for short fishing trips (few hours) with lower costs and the possibility to find direct/local outlets for their catch, but most offshore vessels still stay idle. However, the demand for fresh fish is improving in the retail sector and several species have already reached high prices due to low volumes landed.

[FranceAgriMer data](#) on weekly auction sales (excluding the Mediterranean seaboard) show that for the 31 main species, the positive trend observed in week 13 was confirmed in week 14, although volumes were still very low compared to the same period last year (at around 20-30% of normal activity). However, some major commercial species have experienced strong price increases (+15% for Norway lobster, +18% for monkfish, +20% for whiting, +33% for rays and +23% for ling)

In **the Netherlands**, auction prices (first sale prices) increased from week 13 to week 14. In general, the increase in prices was a result of a rise in demand from both export and domestic markets before the Easter holidays. The positive price trend led to leniencies on the restrictions

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<sup>1</sup> Weekly data on first-sale are conceived to be disseminated as rapidly as possible. For this reason, they only cover some representative products in a selection of locations in some countries. For more information on species, countries and locations covered, please see [here](#).

regarding sole fisheries in both week 14 and week 15. The limited peeling capacity in Morocco persists and brown shrimp fisheries remained closed in week 14. [In week 15, shrimp fisheries will be open for 72 hours starting Monday 10 am.](#)

In five auctions in **Denmark** (Hanstholm, Hirtshals, Strandby, Skagen and Grenaa ), the unusual low volume on Monday 30<sup>th</sup> March was compensated by higher sales the rest of the week. Total volumes sold during week 14 were down by 19% from week 13, but up by 16% from week 12. The prices are still fluctuating from day to day, but the weekly average price in week 14 is up by around 10% compared to both week 12 and 13. However, due to the sharp drop of demand for Norway lobster at EU level, the [Danish Fishermen's Association](#) (DFPO) have recommended different limitations to fisheries for the period 3<sup>rd</sup> April to 19<sup>th</sup> April.



## TYPICAL FOODSERVICE SPECIES ARE STRUGGLING

In Galicia, the **mussel** sector has experienced a 77% turnover decrease in March 2020, mostly because of the closure of restaurants and the absence of alternative outlets. This has resulted in the [suspension of working contracts and part time work in bivalves' farms of Galicia](#).

In wholesale markets of [Rungis](#) in France and [Rome](#) in Italy, farmed **seabass** and **seabream** prices were stable in week 14 compared to week 13.

In **Germany**, [the carp sector is developing take-away and home delivery services](#) to compensate for the loss of foodservice sector outlets, especially in view of the Easter holidays.

Market prices for **Scottish salmon** continue to decline. Industry sources address fall in market prices with practically [no demand in the foodservice segment](#). Over the last few weeks, prices of Scottish salmon have followed those of **Norwegian salmon**. According to the [Nasdaq Salmon Index](#), spot prices of fresh whole salmon of Norwegian origin averaged 4,52 EUR/kg in week 14 – down 0,5% from week 13.



## PROCESSING

## RETAIL DEMAND FOR FROZEN, CANNED AND SMOKED PRODUCTS ON THE RISE

One of the main changes in the retail sector in many Member States has been the closure of fresh counters in large retail shops. In many Member States, fresh seafood in retail shops is now only available as pre-packed products.

For most processors selling to retailers the demand is reportedly strong (especially for canned, frozen and smoked fish) and the supply chains are now working well. For processors processing for other segments the situation seems the opposite.

The **salmon smoking industry** in **Poland** reports strong demand from large scale retailers in the period up to the Easter break and most companies are trying to produce at full capacity. In **France**, the smoking industry (mainly salmon) reports higher volatility in demand and the overall activity is estimated to be close to full capacity.

The **tuna canning industry** in **France** has no supply issues and is running close to its full capacity. The **Italian** food company Bolton Group reports an [increase in canned tuna sales](#) of up to 46,5% as a result of the outbreak.

For French processors specialized in the foodservice sector, loss in activity is estimated at -60%). The worst situation is experienced by the **shrimp** cooking sector as a significant share of companies is dependent on the foodservice sector. The loss in turnover is estimated at -70% compared to usual activity in this period.

According to Rabobank, the **shrimp** sector will be one of the hardest hit seafood sectors due to the strong drop of demand. Moreover, since many shrimp farmers were reluctant to re-stock their ponds, the price decline during the pandemic is likely to result in a steep rise if supply collapses in the second half of the year - provided the market returns to normal.

Important shrimp suppliers to the EU, **India and Ecuador**, are under strict lockdowns with negative effects on both production and trade. In Ecuador, the prices to farmers decreased to a level below production costs in week 14.





## WHOLESALE

### MORE STABILITY IN PRICES AND INCREASED EFFORTS TO SELL DIRECTLY TO END CONSUMERS

With the shutdown of the HORECA sector, there seems to be a general trend with many wholesalers trying to target consumers directly, either by opening shops to consumers or marketing their products through different online channels (including social media) and offering home-delivery.(e.g. in [Brittany, Nouvelle-Aquitaine and Occitanie regions in France](#), the website of the [Centro Agroalimentare di Roma](#) and in [Germany](#).)

In **Spain**, according to FEDEPESCA (10.000 fish shops and 25.000 workers in Spain), fishmongers' turnover has decreased by 30% on average and for some fish shops down to - 70%. One of the main factors is the closure of the hospitality industry, as it represented about 20% of the turnover of fishmongers. [Fishmongers are then developing online/by phone/Whatsapp sales and home delivery](#).



## TRADE AND LOGISTICS

### AIRFREIGHT CAPACITY STILL A BARRIER BUT THERE IS INCREASING DEMAND FOR FRESH SEAFOOD PRODUCTS FROM CHINA

According to [Seabury Consulting](#), cargo capacity on the trade lanes between Europe and Africa and Europe and South America are around 60% lower in both directions compared with the previous year. Between Europe and Pacific Asia, the capacity is down by around 30%.

Reports from China state that both consumption markets and the processing industry is gradually opening and returning to "normal". Weekly trade data from Norway show an increase in export to China back to around the same level as the same period last year. The increase seen for Norwegian salmon on the Chinese market is also good news for EU seafood exporters targeting the Chinese market, as it indicates a step towards market recovery.



## TRADE -EXTRA EU IMPORTS

WEEKLY DATA OBSERVATION<sup>2</sup>

In week 13 of 2020, both volume and value of extra-EU imports continued to decline. Compared with week 12, volume decreased by 2% and value by 9%.

Preservation of imported products	Variation week 13 vs week 11	Variation week 13 vs week 12
Fresh	-25%	-12%
Frozen	+25%	+11%
Prepared - Preserved	-22%	-15%

Imports of fresh products recorded the second lowest volume since the beginning of the year. They mainly regarded whole salmon and cod.

The volumes of imports of **prepared/preserved** (mainly miscellaneous shrimps) products were **very close to that recorded in the same week of 2019**: 5.718 tonnes in 2019 against 5.644 tonnes (-1%) in 2020.

EU imports of **frozen products** (mainly Alaska pollock fillets) in week 13 of 2020 totalled 25.044 tonnes, **a 41%-increase** compared with the same period of 2019.

**Salmon**: its value continued to show a downward trend with a 16%-decrease, linked with a decline in imported volumes from Norway (-5%). To be noted that also the import weekly price went down from 6,07 to 5,68 EUR/kg (-7%), despite NOK appreciation (+2%).

**Cod**: a significant drop both in value and volume was registered (-28% and -30%, respectively). The decreases involved all of the main countries of origin, especially Norway (-29%), Russia (-49%) and China (-80%).

**Skipjack tuna**: it recorded the most significant downward trend of the week: its value dropped by 36%, while its volume by 21%. To be noted that the import weekly price went down from 3,73 to 3,05 EUR/kg (-18%), despite USD appreciation (+3%).

**Alaska pollock**: volumes and values increased significantly (+ 30% and +34%, respectively), due to increasing imports from China, linked with CNY appreciation (+3%).

As regards currencies of top suppliers, between 22<sup>nd</sup> and 29<sup>th</sup> of March:

- EUR depreciated against USD (-3%), NOK (-2%), CNY (-3%), and GBP (-1%)
- EUR appreciated against ISK (+1%).

To learn more about the situation on the market, [you can access most recent weekly data \(up to week 13 of 2020\) for extra EU imports in Europe.](#)

<sup>2</sup> This analysis is based on weekly import data for a selection of 135 couples of CN-8 products and country of origin collected from the EU Commission – DG TAXUD. The complete list of products can be found here: [https://eumofa.eu/documents/20178/24415/Metadata+1+-+DC+-+Annex+1\\_selected+products.pdf/e6f4d2ef-f1f0-418d-94e4-c98fc623ad14](https://eumofa.eu/documents/20178/24415/Metadata+1+-+DC+-+Annex+1_selected+products.pdf/e6f4d2ef-f1f0-418d-94e4-c98fc623ad14)

# Coronavirus response

## EUMOFA's weekly data and trends analysis

### Week 15



#### FISHERIES

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#### STILL LOW VOLUMES BUT SOME SIGNS OF PRICE IMPROVEMENTS DURING EASTER<sup>3</sup>

In week 15, available first-sales data for a handful of EU Member States shows increase in first-sales prices for several groundfish and flatfish species. The increase in first-sales prices can be due to increase in demand for the Easter holidays. However, it should be noted that volumes sold at first-sale stage were in general low, and at local level some species still suffered marked decline in prices.

**In Spain**, at the end of week 15, CEPESCA and FEDEPESCA report that more than 50% of fisheries and almost 100% of distribution are still active. [Prices at first sale, although volatile, are recovering.](#)

In **France**, fishing activity and landing volumes are still low, but some smaller auctions have reopened yet with limited activity. [FranceAgriMer data on weekly auction sales](#) (excluding the Mediterranean) show that, compared with week 14, volume were stable (+2%, mostly due to a strong increase of scallop volumes) and average prices slightly increased (+9%). Trends vary a lot across species.

In five [Danish auctions](#) (Hanstholm, Hirtshals, Strandby, Grenaa and Skagen), daily average volumes were slightly higher over the three working days in week 15 compared to the five days in week 14. Prices showed an increasing trend in week 15, with large variations across species.

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<sup>3</sup> Weekly data on first sale are conceived to be disseminated as rapidly as possible. For this reason, they only cover some representative products in a selection of locations in some countries. They do not aim to give complete coverage of the market, and so it is recommended to use them as a mere indication of ongoing trends. For more information on species, countries and locations covered, please see [here](#).



## AQUACULTURE

### PRODUCTION CONTINUES BUT SALES AND LIQUIDITY ARE STILL A CHALLENGE

The [aquafeed producer BioMar](#) states that the measures taken across Europe to mitigate the impact of COVID-19 have had no negative consequences on feed production and deliveries from their production facilities in **Greece, Spain, France, Denmark** (and Turkey).

For **eel farmers in the Netherlands**, sales have dropped by nearly 40% or even more for some farmers since the COVID-19 outbreak. Traditionally, around 50% of eel sales is to the HoReCa segment. The steep drop in income may impact farmers ability to build up livestock for future harvest<sup>4</sup>.

COVID-19 has hit the **Greek seabass and seabream** farming industry hard. Sales have decreased by 40% since the COVID-19 outbreak, while companies more heavily exposed to the foodservice industry report [declines by 60% to 90%](#). Lack of liquidity is becoming more and more intense, due to sales reduction and requests for extension of payments from wholesalers and retailers.



## PROCESSING

### POSSIBLE RAW MATERIAL SHORTAGE AHEAD

Emergency measures in Ecuador might impact supply of tuna products and in turn [the Spanish tuna canning industry](#), which is highly dependent on frozen tuna loins from Ecuador.

Fear of contagion has induced local authorities in [Bristol Bay, Alaska, to consider closing commercial wild Pacific salmon fisheries](#). Cancellation might result in lack of good quality raw material at an affordable price for EU salmon smokers who source locally.



## WHOLESALE

### STABLE OR INCREASING PRICES DURING EASTER WEEK

The Easter period drove up demand and prices in **Italy**. In week 15, prices were up in [Rome wholesale market compared to week 14](#), especially for clam and bigger gilthead seabream but down for Tyrrhenian anchovy.

In **Spain**, in [Madrid wholesale market](#), prices were stable except for hake and anchovy.

<sup>4</sup> Source: personal communication.

In [Rungis wholesale market](#) in **France**, prices increased in week 15, especially for cod, brill, squid, wild-caught seabream, pollack, ray, John Dory and turbot.



## RETAIL & CONSUMPTION

### CONSUMERS TESTING NEW WAYS OF SHOPPING

**Online sales and home delivery** of seafood products have increased rapidly during lockdown. Although from low volumes, e-commerce sales of fresh produce have increased by 25% and online takeaway deliveries have doubled, according to [Rabobank analysts](#).

In **Spain**, in week 13, [fish and seafood consumption at retail level](#) increased by 11,5% for fresh products, 6,9% for frozen products and 13,3% for preserved products compared to previous week. However, the total fish and seafood consumption was 4% below the same week last year.



## TRADE AND LOGISTICS

### LOW DEMAND REDUCES IMPORTS, LOGISTICS STILL A BARRIER FOR EXPORTS

Other fresh products which stopped being imported in the EU in March are fresh hake from Namibia and Chile, common sole from Iceland, fresh scallops from the USA, fresh clams from Tunisia, fresh blue mussels from Norway and fresh Nile perch fillets from Uganda.

**As regards extra-EU imports<sup>5</sup>**, in week 14 of 2020, volume and value of extra-EU imports continued decreasing. Compared with week 13, volume dropped by 14% and value by 8%.

Preservation of imported products	Volume variation week 14/week 12	Volume variation week 14/week 13
Fresh	+3%	+16%
Frozen	-22%	-30%
Prepared - Preserved	-24%	-13%

<sup>5</sup> This analysis is based on weekly import data for a selection of 135 couples of CN-8 products and country of origin collected from the EU Commission – DG TAXUD. The complete list of products can be found [here](#)

Volume of **fresh products** (mainly salmon and cod) imported in the last 4 weeks was **11% lower than in the same period of 2019<sup>6</sup>**, although a similar trend was shown in both years: after a negative peak touched in week 13, in week 14 there was a recovery.

**Imports of frozen products** (mainly Alaska pollock) **increased by 20% between week 11 and week 14 compared with 2019**. While they were on a downward trend in 2019, in 2020 they reached a peak during week 13, only to be followed by a decline shortly thereafter.

Imports of **prepared-preserved products** (mainly skipjack tuna) in the last 4 weeks **were 12% lower in volume compared with the same period of 2019**. While they were increasing in 2019, between week 11 and week 14 of 2020 they fell by 30%.

**Salmon:** after a 3-week downward trend, value increased in week 14 by 4%, due to a 9%-growth of imported volumes from Norway. Import weekly price continued to decline, from 5,68 to 5,35 EUR/kg (-6%), despite NOK appreciation (+3%).

**Cod:** significant growth in value and volume was registered in week 14 compared to the previous week (+20% and +26%, respectively), due to increasing imports from Norway (+38%) and Russia (+58%). Weekly price decreased by 4%, its lowest since week 7 of 2020 (5,57 EUR/kg).

**Skipjack tuna** continued on a downward trend, dropping by 30% in volume and 18% in value in week 14, reaching the levels recorded at the beginning of the year. The import weekly price went up from 3,06 to 3,57 EUR/kg (+17%), despite USD depreciation (+1%).

**Alaska pollock:** Compared to the previous week, volume and value decreased significantly (-58% and -60%, respectively), and price went down from 2,98 to 2,84 EUR/kg (-5%).

**Warmwater shrimps:** extra-EU imports declined by 19% in volume and 17% in value.

**EU imports of fresh whole seabass and seabream from Turkey** have plummeted.

Throughout March, imports dropped by more than 50%, and by more than 70% compared with week 14. Import prices were relative stable in week 13 and 14 at around 4 EUR/kg.

Data show that **EU imports of fresh/live lobster from the USA practically stopped from week 12** (due to a combination of constraints in logistics and restaurant demand). US exports of fresh/live lobster have been heavily impacted by the COVID-19 crisis. As regards currencies of top suppliers, between 15<sup>th</sup> of March and 5<sup>th</sup> of April EUR depreciated against NOK (-11%) and GBP (-4%) and appreciated against USD, CNY and ISK (USD: +2%; CNY: +1%; ISK: +4%).

To learn more about the situation on the market, [you can access most recent weekly data \(up to week 13 of 2020\) for extra EU imports in Europe](#).

<sup>6</sup> To be noted that the 4-week period in 2019 did not include the week before Easter.

# Coronavirus response

## EUMOFA's weekly data and trends analysis

### Week 16



#### FISHERIES

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#### FISHING ACTIVITY AND LANDINGS SLOWLY RECOVERING, BUT STILL LOW PRICES:<sup>7</sup>

In several Member States, fishing activity and landings are increasing slowly. As there is still a lack of demand, the prices are generally low. However, trends vary a lot across different species.

In **France**, weekly auction sales data from [FranceAgriMer](#) (excluding the Mediterranean seaboard) show a 22%-increase in volume and 17%-decrease in prices for 31 main species. However, there were also significant price increases for some species, despite increasing volumes (+36% for mackerel, +14% for saithe).

In **Italy**, the fishery sector experienced a major setback during the first three weeks of March. Since the beginning of April, [there has been a recovery in activity levels in some ports](#), although very slow and progressive; first-sale prices are higher than in mid-March, when they collapsed following the fall in supply and demand. The small pelagics fishery is almost completely stopped due to the high volumes of landings, the high perishable nature of the product and the poor functioning of export markets.

In week 16, [five auctions](#) in **Denmark** (Hanstholm, Hirtshals, Strandby, Grenaa and Skagen), recorded the highest total volume since restrictions were imposed, mainly driven by hake and cod but also by relatively high volumes of saithe, ling and pollack. Although with large variations across species, the high volumes affected the overall weekly average price which decreased almost down to the levels of week 12 and 13.

In **the Netherlands**, the daily auction prices of brill, turbot and sole showed a downward trend in both week 15 and the beginning of week 16. During week 16, the prices stabilized and on Friday they increased a bit. However, on Monday this week (week 17), the prices were down again to around the same level as the week before. In week 16, about one third of both the flatfish and Norway-lobster fleet and one fourth of the shrimp fleet ceased fishing and stayed in port supported by the EMFF through the fisheries part of [the Coronavirus Response Investment](#)

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<sup>7</sup> Weekly data on first sale are conceived to be disseminated as rapidly as possible. For this reason, they only cover some representative products in a selection of locations in some countries. They do not aim to give complete coverage of the market, and so it is recommended to use them as a mere indication of ongoing trends. For more information on species, countries and locations covered, please see [here](#).



[Initiative of the Commission](#), regarding compensation for the temporary cessation of fishing activities<sup>8</sup>.

In **Spain**, many vessels are going back at sea, all seaboard included. [The anchovy campaign](#) started on 20 April. [Daily quotas have been lowered](#) by producer organizations to test the market (demand and prices). Moreover, [all long-distance fishing vessels are active](#), except for pole and line Basque vessels fishing in Senegal still stopped due to the closures of airports and harbors in Senegal and to prohibition of crew turnover in Mauritania. [Galician auctions](#) are reporting a stabilization of prices for hake, anglers and megrims. However, prices are still low for swordfish and sharks. Low prices for tuna are also reported due to the comeback of Chinese tuna exports.

In **Germany**, the shrimp fishermen association report a [sharp drop of demand and prices for brown shrimp combined with strong difficulties to get them peeled in Morocco](#) due to restrictions measures. The financial situation of companies, already weakened by low sales in 2019, is considered at risk.

## Production in relevant non-EU countries

In **India**, fishing, aquaculture and related activities are exempted from the prolonged lockdown until 3<sup>rd</sup> May. Some shrimp processors are reopening but due to social distancing measures, operating capacity is reduced by up to 70%. Trade might also pick up when official laboratories now open again. During the lockdown, obtaining product export certificates has been one of the major bottle necks for trade<sup>9</sup>.

In **Morocco**, after the implementation of strict restriction measures retaining crew on land, the seiner vessels fishing sardines have gone back fishing<sup>10</sup>.



## POSITIVE SIGNALS BUT UNCERTAINTY IS HIGH

The processing industry of both salmon and whitefish in **Poland, Lithuania and the Netherlands** shows a positive trend compared to the same period last year, [according to the latest export data from the Norwegian seafood council](#). Comparing the Easter week in 2020 (week 15) with 2019 (week 16), export of fresh whole salmon increased by 63% to Lithuania, 10% to Poland and 8% to the Netherlands.

Supply chain disruption could lead to **issues regarding labelling of processed products**. Due to a potential scarcity of some specific raw materials, the use of substitutes could lead to changes in the formulas of the processed products. Consequently, pre-printed labels may no longer correspond to the actual recipe used.

<sup>8</sup> Source: personal communication.

<sup>9</sup> <http://www.undercurrentnews.com/>

<sup>10</sup> <https://leseco.ma/peche-les-sardiniers-reprennent-la-mer/>





## WHOLESALE

### STABILITY IN PRICES WITH SOME SIGNS OF RECOVERY

After the Easter-related demand, prices seem to decrease in **Italy**. In week 16, prices were down in [Rome wholesale market](#) compared to week 15, especially for clam (-14%) and anchovy (-30%), but up for domestically farmed gilthead seabream. Despite the prolonged closure of restaurants, thanks to a slight increase in demand, [salmon prices are starting to recover](#) even though still lower than usual.

In **Spain**, in [Madrid wholesale market](#), prices have been stable for mussel, anchovy, sole and turbot but decreasing for several important commercial species: -20% for both hake and swordfish, -12% for monkfish.

In [Rungis wholesale market](#), in **France**, prices were stable in week 16 compared to week 15.



## RETAIL & CONSUMPTION

### INCREASING ONLINE SALES AND NEW DIGITAL MARKETPLACES

In **Italy** the Covid-19 outbreak continues to negatively affect demand for fresh fish products; in large retail chains, consumers are still currently oriented towards products known as "Free service" (packaged), or products with a longer shelf life (canned and ready-to-use products).

Several innovative solutions are being developed or expanded to promote fresh and local seafood consumption and facilitate direct sales from fishers, wholesalers and producers to consumers. E.g. online sales from fishers in [Italy](#), [Germany](#) and [the Canaries](#) or a [vending machine system for fresh fish](#) in a market in Krško, Slovenia. In the **Netherlands**, a [temporary non-profit digital marketplace](#) has been established to facilitate direct sales from HORECA suppliers to consumers.

In **Spain**, [FEDEPESCA reported an increase of online/phone sales](#): 20% of fish sales are made in physical shops and 80% are delivered at home. The most consumed species have not changed: hake, anglers and megrims.



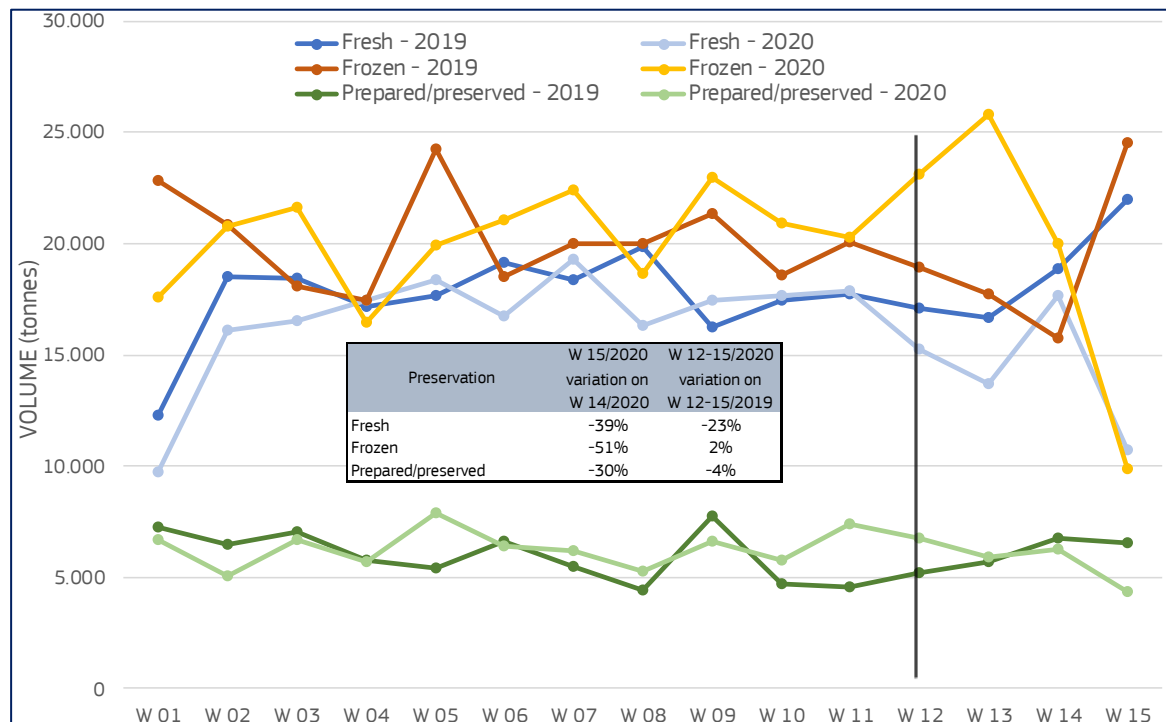
## TRADE AND LOGISTICS

### SIGNIFICANT DROP IN IMPORTS DURING EASTER HOLIDAYS

Compared with week 14, both volumes and values of extra-EU imports dropped significantly, mainly due to Easter holidays: **volumes decreased by 43%** and **values declined by 40%**.

**All main preservation categories** (fresh, frozen and prepared/preserved) **registered significant drops**. Among fresh, whole products were the most affected.

The volume of fresh products (mainly salmon and cod) imported in the last 4 weeks of 2020 was 23% lower than in the same period of 2019. Imports of frozen and prepared-preserved products in weeks 12-15 of 2020 were almost stable compared with the same period last year, the first slightly higher (+2%), the latter 4% lower.



5 products accounted for 61% of the decrease in terms of volume: salmon from Norway (29%), coldwater shrimp from Greenland and Alaska pollock from China (9% each), cod from Norway (8%) and warmwater shrimp from Ecuador (6%).

The effects of **increased demand due to stock-piling of durable seafood products is observed in Norwegian exports of salted cod and clip fish. Norwegian export of clipfish to Portugal in 2020-Q1** increased by 41% in volume and by 62% in value compared to the same period last year, while salted cod increased by 30% in volume and by 45% in value<sup>11</sup>. As Italy is the major market for Norwegian export of dried cod, this has had large effects on Norwegian exports, which decreased by 27% in volume and 41% in value in March this year compared to March 2019.

According to the Vietnamese Association of Seafood Exporters and Producers (VASEP), **Vietnam** exports to the EU decreased by 40%, to China by 25%, to South Korea by 24% and to Japan by 19%<sup>12</sup>. As regards **currencies of top suppliers**, between 22<sup>th</sup> of March and 12<sup>th</sup> of April, EUR depreciated against USD (-2%), NOK (-4%), CNY (3%) and GBP (-3%) and appreciated against ISK (+1%). In addition, in March **marine fuel prices** in Europe dropped by 26% on average compared with previous month (moving from 0,43 EUR/litre to 0,32 EUR/litre). The most significant decreases were in Belgium, Greece, Malta and the Netherlands (-30% in each country). From March 2019, when they averaged in Europe at 0,49 EUR/litre, the drop was by 35%<sup>13</sup>.

To learn more about the situation on the market, you can access most recent weekly data (up to week 16 of 2020) for extra EU imports in Europe.

<sup>11</sup> Norwegian seafood council

<sup>12</sup> Source: FischMagazin 15.04.2020

<sup>13</sup> Source: MABUX

# Coronavirus response

## EUMOFA's weekly data and trends analysis

### Week 17



FISHERIES

#### FISHING ACTIVITY SEEMS TO BE INCREASING BUT HIGHER LANDING VOLUMES ARE PUTTING PRESSURE ON FIRST-SALE PRICES<sup>14</sup>

In several Member States, fishing activity and landings continue to increase. However, market conditions put pressure on first sales prices. Reduced fishing activity is reported for small pelagic fisheries in the North Sea due to fishing season ending.

In **France**, fishing activity and landing volumes increased in week 17. Weekly auction sales data from [FranceAgriMer](#) (excluding the Mediterranean seaboard) show a 22%-increase in volume and 5%-decrease in prices for 31 main species. [Hake, monk and haddock are among the species for which prices fell the most, while price for mackerel rose steeply](#) (+44% on low landing volume).

For the second week in a row, [five auctions](#) in **Denmark** (Hanstholm, Hirtshals, Strandby, Grenaa and Skagen) have reported the highest volume since restrictions were imposed. The total volume in week 17 increased by 48% compared to week 16. At the same time, the weekly average price decreased to the lowest level since restrictions were imposed. Different flatfish (especially plaice), Norway lobster, cod, pollack and saithe were the main species contributing to the volume increase.

In **Spain**, big losses for the fishing fleet have forced coastal vessels to return to work both in the Mediterranean and in the Cantabrian Sea. More vessels fishing have had a negative impact on prices. In the Basque region, first sale price for anchovy has been low, [down to 0.04 EUR/kg](#). Long-distance fleets have been forced to store most of their frozen landings waiting for the increase of demand, as specifically dependent on the Horeca sector, leading to a drop of prices.

Despite protests from local fishermen in Dingle, landings in **Ireland from Spanish vessels** fishing off the Irish coast have proceeded well. The fish landed in Ireland goes directly from the vessels to the Spanish market. For the **whitefish sector in Ireland**, the fishing activity is reportedly (source: personal communication from industry sources) good for those who have permanent agents or are members of Co-ops. The **shellfish fleet are mostly tied up** – except from very small inshore vessels – due to **limited market demand**.

<sup>14</sup> Weekly data on first sale are conceived to be disseminated as rapidly as possible. For this reason, they only cover some representative products in a selection of locations in some countries. They do not aim to give complete coverage of the market, and so it is recommended to use them as a mere indication of ongoing trends. For more information on species, countries and locations covered, please see [here](#).



## AQUACULTURE

### LOW DEMAND AND MARKET PRICES ARE A CHALLENGE FOR FARMERS TARGETING THE HORECA SEGMENT

The **Spanish turbot farmer** [Stolt Sea Farm](#) reports being hit hard by the widespread shutdown of restaurants and hotels. The company plans to reduce feed to slow biomass growth and, in case of overstock, harvest the poor growers and freeze part of the stock.

Restaurant demand **for bluefin tuna** has dropped both in the EU and in the main export market, Japan. This has impacted the EU bluefin tuna farming industry's profitability. In Japan, the price of high-grade bluefin tuna has during the COVID-19 lockdown period [dropped to about half the usual level](#) at main ports in Japan.

**Irish aquaculture producers** are suffering cashflow problems, with 40-60% losses in turnover compared with the same period last year. However, according to [Irish Farmers Association - Aquaculture](#), changes in EMFF rules give Irish producers access to urgent, powerful and extraordinary measures to prevent the COVID-19 emergency from having irreversible negative impacts.

The COVID-19 lockdown in Italy has led to an unprecedented 70% contraction in aquaculture sales, as disclosed by [the Italian Association of Aquaculture farmers](#) (API).



## PROCESSING

### UNCERTAINTY PERSISTS, WITH DIFFERENT INDUSTRIES FACING DIFFERENT OUTLOOKS

In **Ireland**, processing of species in good demand on the domestic market (i.e haddock, whiting and other similar species) is currently according to industry sources. Most products are **sold through supermarkets**. On the other hand, **crustacean processors** are **very badly affected** with virtually no supply.

In **Spain**, [the anchovy canning industry is working at 50% of its capacity](#), mostly because processing plants have reduced their number of employees in order to respect distancing measures.



## WHOLESALE

### DIFFERENT TRENDS ACROSS WHOLESALE MARKETS IN THE EU

In week 17, prices of most major commercial species were stable in [Rome wholesale market](#) compared to week 16, with still low volumes.

In **Spain**, in [Madrid wholesale market](#), prices have been decreasing for many main species (28/04 compared to 21/04), sharply for some of them: Gran sol hake (-31%), monkfish (-19%), and anchovy (-56%).

In [Rungis wholesale market](#), in **France**, fresh fish prices have been increasing for many main species in week 17 compared to week 16: about +10% for wild-caught seabass whereas prices of farmed seabass remained stable; +10% for plaice; +10-15% for pollack; +7-10% for big monkfish tails; +4-8% for Norwegian salmon; +18-21% for live brown crab.



## RETAIL & CONSUMPTION

### PANEL DATA SHOW INCREASE IN AT-HOME CONSUMPTION OF MAJOR SPECIES IN THE WEEK BEFORE LOCKDOWN

**Consumer panel data** for **weeks 9 to 12 (first weeks of the crisis before lockdown)** show that at home consumption of salmon in **Spain, France and the UK** rose by **12%, 21% and 18%**, respectively. In France, home consumption of frozen cod fillets rose by 48%. Other observations on retail level in France are: increased shelf space for salmon products, increased availability and sales of ready to cook products of salmon and cod. [The strongest growth in retail purchases was observed for frozen products.](#)

In France, at-home consumption of cod and salmon increased more than seafood consumption in general, primarily due to increased availability of pre-packed products in retail. In March, at-home consumption of seafood in France increased by 11%, while salmon increased by 21% and frozen cod fillets by 49%, according to the [Norwegian Seafood Council](#).

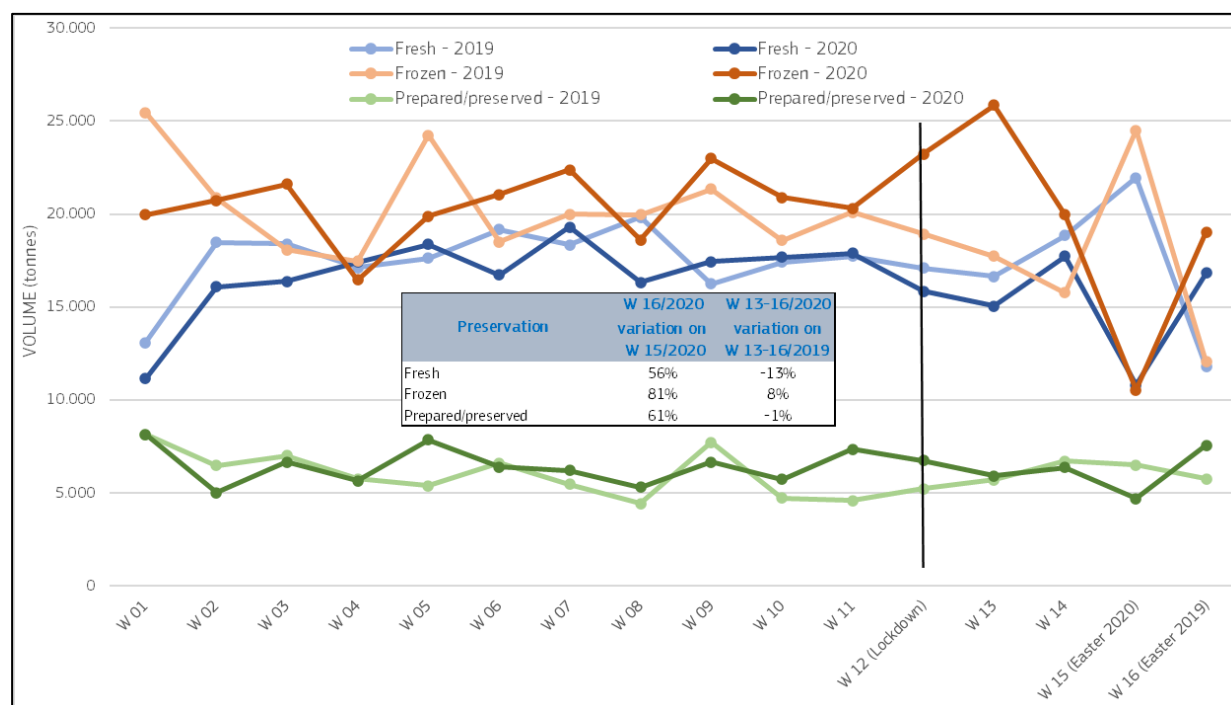


## TRADE AND LOGISTICS

## AS IN PREVIOUS YEARS, EU IMPORTS INCREASED SIGNIFICANTLY IN THE WEEK FOLLOWING THE EASTER HOLIDAYS

Compared with **week 15**, extra-EU imports showed a strong recovery, as volumes **grew by 63%**, while **values increased by 55% in week 16**.

Five products accounted for 66% of the increase in volume: salmon from Norway (30%), coldwater shrimp from Greenland (15%), Alaska pollock from China (9%), yellowfin tuna from Seychelles (7%) and miscellaneous shrimps from Greenland (5%). **All main preservation categories (fresh, frozen and prepared/preserved) registered significant growth. Among fresh, whole products even exceeded the 2020-average.**



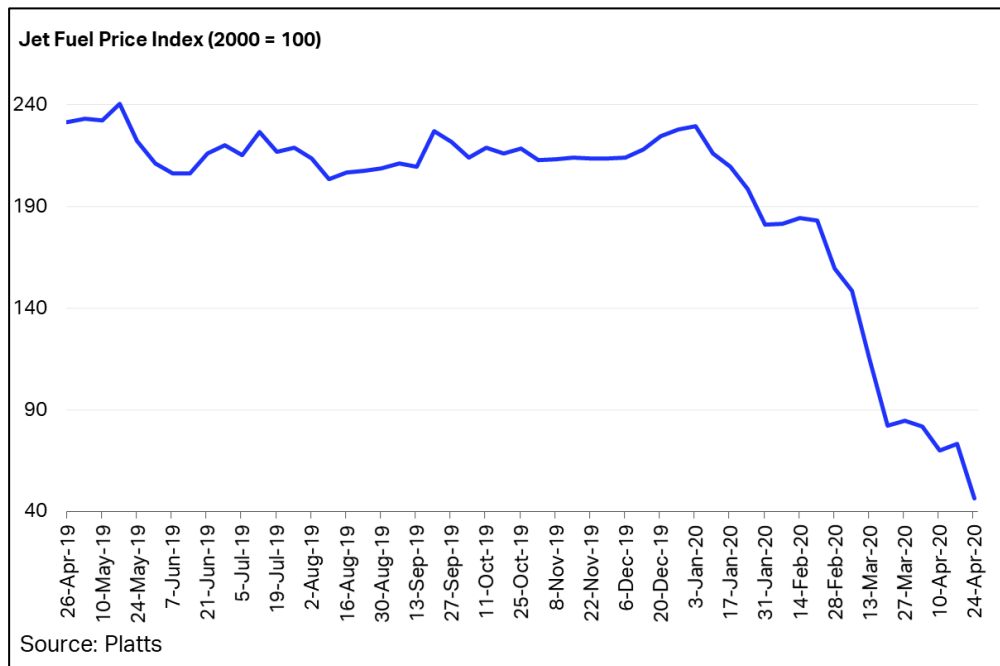
The volume of **fresh** products (mainly salmon and cod) imported in the last 4 weeks of 2020 was **13% lower than in the same period of 2019**. According to industry sources, Norwegian suppliers report better-than-expected demand for fresh cod – especially from buyers processing pre-packed products for retailers.

The volume of **prepared-preserved** products (mainly skipjack tuna) imported in weeks 13-16 of 2020 were mostly stable (-1%) compared with the same period in 2019. Also the 4-week average of the period was the same in both years.

EU imports of **Alaska pollock** in week 16 increased by 182% in volume and 238% in value compared with week 15, reaching the level before Easter. Raw material prices for headed and gutted pollock are currently diving, as **Chinese processors and Russian suppliers** report a **lack of orders** due to the coronavirus pandemic.

As regards currencies of top suppliers, between 29<sup>th</sup> of March and 19<sup>th</sup> of April, EUR appreciated against ISK (+2%) and depreciated against GBP (-1%). EUR exchange rates with USD, NOK and CNY remained fairly stable.

In the 2<sup>nd</sup> half of March, the air freight rates charged from some European suppliers of live and fresh seafood to overseas markets were at maximum 3,5 – 4 EUR/kg – due to lack of belly-freight capacity and strong competition from other high valued products<sup>15</sup>. Capacity has gradually improved, and freight rates have come down from this extreme level. At the same time, jet fuel prices have decreased further. Over a 30-day period ending on 24<sup>th</sup> April, jet fuel prices dropped by 45%.



To learn more about the market situation, [you can access the most recent weekly data \(up to week 17 of 2020\) on extra EU imports in Europe.](#)

<sup>15</sup> Industry sources.



# Coronavirus response

## EUMOFA's weekly data and trends analysis

### Week 18



#### FISHERIES

#### LOWER PRODUCTION IN WEEK 18<sup>16</sup>

In several Member States, fishing activity and landings decreased in week 18. Impacts on first sales prices vary across countries:

[GFCM](#) reports moorings of 80% of the operating **Mediterranean fleet** and a general drop in first-sale prices (between -20% and -70%). The small-scale coastal fleet is the most affected by the crisis while the large-scale fleet has managed to maintain its activity in a range that varies between 40% and 100%. This reduced fish production by 75% in most countries.

In **Italy**, the [current situation](#) is heterogeneous and represents an exception: hardest impacts on trawler fleet, whereas small-scale fleet can survive through direct sales and local fishmongers. The sector fears that some fishing companies may request support for scrapping of fishing vessels by the end of the year due to economic difficulties.

In **France**, first sales in Atlantic auctions decreased in week 18. Auction sales data from [FranceAgriMer](#) (excluding the Mediterranean seaboard) show a 29%-decrease in volume and 9%-increase in prices for 31 main species over week 17. Saithe, scallop, whelk and sardine drove this drop in volume whereas significant price increases were reported for sardine, ray, whiting and monkfish.

For the third week in a row, the average prices decreased in [five auctions](#) in **Denmark** (Hanstholm, Hirtshals, Strandby, Grenaa and Skagen). From week 17 to week 18, sales decreased by 17% and their value dropped by 35%. The prices were at their lowest in the beginning of week 18 - mainly caused by large landings of saithe, hake, cod and pollack – then started to increase towards the end of the week, together with lower volumes.

In **Spain**, the fishing fleet activity is slowly recovering. For the anchovy campaign, [week 18 has been more positive](#) with increased prices due to the localization of bigger-size anchovy banks and lowered quota. [Bigger anchovy average prices reached 2,00 EUR/kg](#), which is above

<sup>16</sup> Weekly data on first sale are conceived to be disseminated as rapidly as possible. For this reason, they only cover some representative products in a selection of locations in some countries. They do not aim to give complete coverage of the market, and so it is recommended to use them as a mere indication of ongoing trends. For more information on species, countries and locations covered, please see [here](#).



profitability threshold. However, on top of EUR 40 million temporary cessation measures, EUR 10 million funding will be granted for Producer Organizations for [supporting storage costs](#).



## AQUACULTURE

### LOW DEMAND LEADS TO STOCK MANAGEMENT ISSUES

In **Spain**, the farmed seabass and seabream sectors were already affected by low prices and Storm Gloria, leading to reduced production and stocking in 2019. The COVID-19 crisis will drive this trend further. Then in 2020, a contraction of the supply is expected, leading to increased imports from Greece. Seabass and seabream farmers are not selling as much as they used to, and once restrictions lift, will be selling only slightly larger fish. Typically, the larger sizes have gone into the HoReCa channel, which is not going to recover as fast as retail. Companies already producing processed and frozen products are better positioned.

According to industry sources, several companies in **Denmark**, including newly established RAS<sup>17</sup> farms, selling to the HoReCa segment, are severely impacted by the crisis. Steep fall in revenues increases pressure on farmers' liquidity, and several companies are struggling for survival.



## PROCESSING

### EQUIPMENT SUPPLIERS INVEST ON ONLINE SERVICES

The [seafood industry's major processing equipment suppliers](#) are stymied by global travel bans, lockdowns and other restrictions, making critical repairs and updates more complex than ever. Even though travels for technicians are still possible, as the suppliers of food processing equipment are regarded as vital for the supply chain, companies have invested and shifted to online services.

The **Portuguese tuna and seafood processing company A Povieirais** is expanding its production in the middle of the covid-19 pandemic. The company is the 3rd largest processing company in Portugal and sells 8 brands including the tuna and seafood brands Alva, Ala Arriba and Minarva. The company have invested EUR 20 million in the expansion which started in March. 42 new workers have been employed in the plant. The goal of the expansion is to increase production for the export markets (source: ATUNA).

<sup>17</sup> Recirculating aquaculture systems



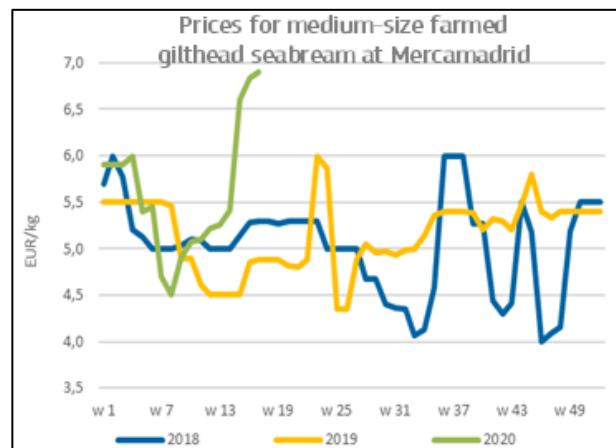
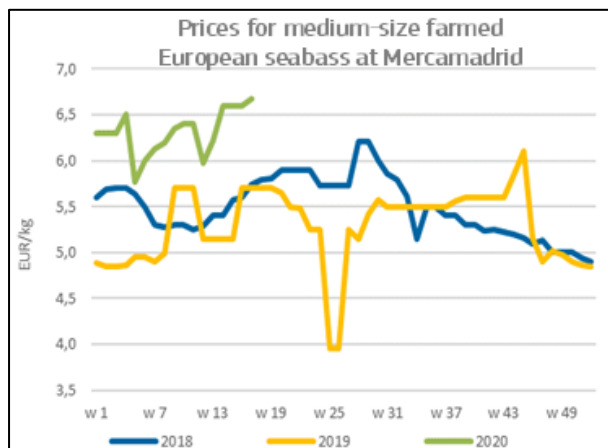
## WHOLESALE

### DIFFERENT TRENDS ACROSS THE EU, WITH GOOD PRICE LEVELS FOR FARMED SEABASS AND SEABREAM

In **Rungis (France)**, prices of fresh fish have been stable in week 18 compared to week 17.

In **Rome (Italy)**, the same price stability was observed, at the exception of the increase for Adriatic shrimps, and the sharp drop for anchovy (-39%) due to recovering supplies.

At **Mercamadrid (Spain)**, prices decreased for several species in week 18, especially for hake (-11% to -20%), monkfish tails (-20%), and swordfish (-8%). However, anchovy price increased by 25% due to tighter supplies. In April, a steep upward price trend is observed for all sizes of farmed seabream: for medium sized (400-600gr), prices averaged 6,44 EUR/kg, +37% from 2019 and +24% from 2018.



## RETAIL & CONSUMPTION

### CLOSED HOTELS AND RESTAURANTS AND CHANGES IN CONSUMPTION HABITS FORCE COMPANIES TO ADAPT THEIR MARKETING STRATEGIES

In **France**, despite still low sales of fresh fish, [purchases of prepacked fish products are increasing](#), especially due to the strong growth of purchases through drive-through services. Thus, several companies that used to sell their product as whole fish on fish counters are moving into prepacked products.

In **Italy**, the [consumption of fish products is increasing](#) where people have more time to cook. The situation is more difficult on coastal regions where the fishing sector highly depends on tourism and restaurants. According to [ISMEA](#), processed fish products were more consumed during the weeks of containment.

In **Spain**, **fishmongers** have lost 20% of turnover with the closure of HORECA channels. Moreover, the species usually bought for special occasions or through “pleasure” purchases (e.g. shellfish) are the most impacted by the drop of demand. In-stores sales currently only account for 25% of sales, whereas at home delivery for 75%. This has driven the logistic costs to increase by 75% (Source: Alimarket 05.05.2020).



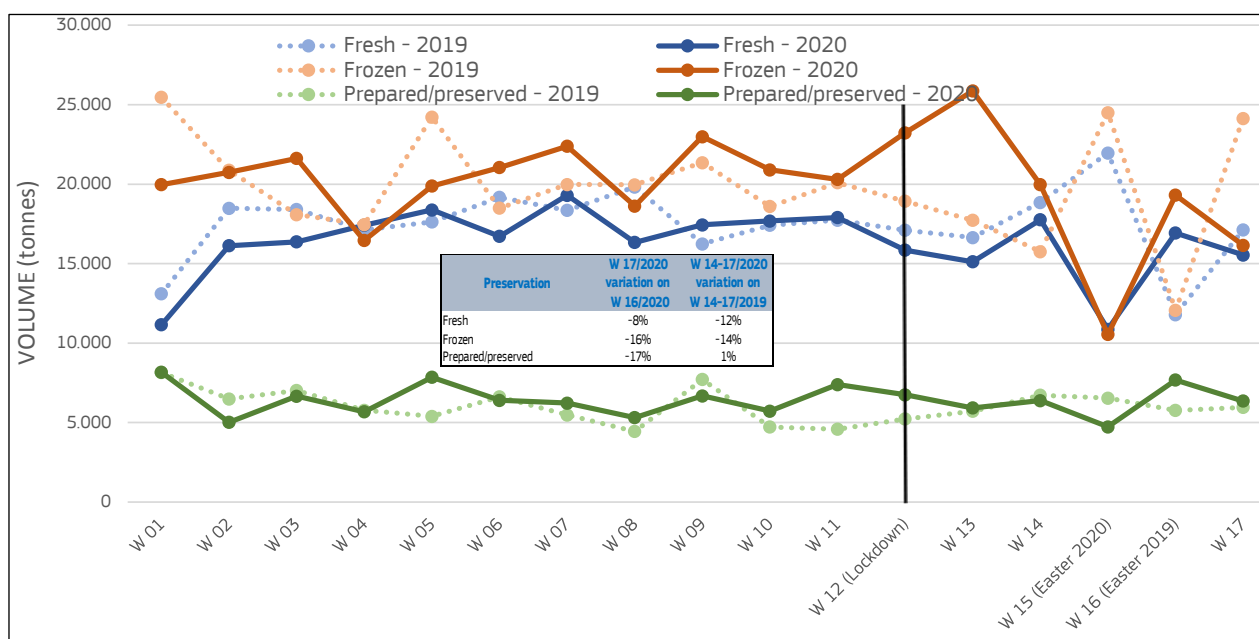
## DECREASED EU IMPORTS FROM WEEK 16 TO WEEK 17

Compared with previous week, EU imports of the major species from main origins declined by 13% in both volume and value.

Differently from the same week of 2019, **all main preservation categories (fresh, frozen and prepared/preserved) showed a downward trend**. Nevertheless, among fresh, filleted products increased by 12% in 2020, thus exceeding by 8% the 2020-average.

The volumes of **fresh** (mainly salmon and cod) and **frozen** products (mainly warmwater shrimp) imported in the last 4 weeks of 2020 were, respectively, **12% and 14% lower than in the same period of 2019**.

Imports of **prepared/preserved** products (mainly skipjack tuna) in weeks 14-17 of 2020 **were almost at the same level of the same period in 2019**.



Five products accounted for 60% of the decrease in terms of volume: coldwater shrimp from Greenland (23%), Alaska pollock from China (13%), yellowfin tuna from Seychelles (9%), salmon from Norway (8%).

**Miscellaneous shrimps:** in week 17, DG TAXUD recorded that no arrival from Greenland occurred, thus making total imports dropping by more than 80% in volume and value. At the same time, the import price declined by 7% (from 7,70 to 7,18 EUR/kg), although the USD depreciation (~2%).

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In the first 17 weeks of 2020, **EU import** prices of fresh **farmed European seabass from Turkey** averaged 3,86 EUR/kg, up 5% from the corresponding period in 2019. Since the lockdown, import prices have trended up and the current price level is just above 4,00 EUR/kg and imports volumes have trended up and in week 17 exceeding 400 tonnes. It is still a way up to pre-lockdown levels.

**EU imports** quantities of fresh whole **gilthead seabream from Turkey** have in the same period shown the same increasing trend as for European seabass, but volumes have been higher. In week 17, they turned 600 tonnes. EU import prices of Turkish gilthead seabream have trended on a higher level than seabass in the first 17 weeks of the year. Since the lockdown, the price gap between the species has narrowed. EU import prices of fresh gilthead seabass averaged 4,02 EUR/kg in the 17 first weeks of 2020. This represents an increase of 10% from the corresponding period in 2019. In week 17, the import price rose to 4,10 EUR/kg.

EUR exchange rates with CNY, GBP and ISK were fairly stable between 19 and 26 April. EUR appreciated against USD (+2%) and depreciated against NOK (-2%). In the same period, marine fuel prices<sup>18</sup> in Europe decreased by 20% on average (from 0,25 EUR/litre to 0,20 EUR/litre). The highest average price during the period was in Spain (0,29 EUR/litre) and the lowest were in Belgium, Greece and the Netherlands (0,17 EUR/litre in each country).

To learn more about the market situation, [you can access the most recent weekly data \(up to week 17 of 2020\) on extra-EU imports](#).

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<sup>18</sup> Source: MABUX. As data for Saturdays and Sundays are not available, prices analysed refer to the following days: 20<sup>th</sup>, 21<sup>st</sup>, 22<sup>nd</sup>, 23<sup>rd</sup>, 24<sup>th</sup> and 27<sup>th</sup> April.

# Coronavirus response

## EUMOFA's weekly data and trends analysis

### Week 19



#### **SLOW RECOVERY OF FISHING ACTIVITY WITH MIXED EFFECTS ON PRICES<sup>19</sup>**

In **Spain**, according to the Ministry of Agriculture, Fisheries and Food, fishing activity keeps recovering with [55% of the Spanish fleet active](#). At first-sale level, monk, megrim and hake prices have been decreasing. One explanation is [the increase of sales in Spain of Irish and Scottish fish](#) that used to be exported to France.

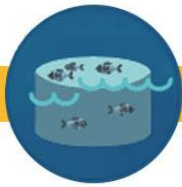
In **France**, [FranceAgriMer](#) data on weekly auction sales (excluding the Mediterranean seaboard) show that for the 31 main species, volumes increased significantly from week 18 to week 19. The average price increased as well (+18%), mostly because of the increasing share of higher valued species in total sales (monk, Norway lobster, black seabream, rays, red mullet, turbot) and drops of sales of lower valued species such as mackerel and scallop.

In [five auctions](#) in **Denmark** (Hanstholm, Hirtshals, Strandby, Grenaa and Skagen), sales decreased by 24% in volume from week 18 to week 19. However, Friday 8<sup>th</sup> May was a holiday and average daily volumes were quite similar in both weeks. The increasing price trend of week 18 continued in week 19, mostly driven by cod, hake, monkfish and pollack.

In **the Netherlands**, the first-sale auction prices in week 18 [continued a negative](#) trend for the fourth consecutive week. The average price of brill, turbot and sole were 5,30 EUR/kg, 5,59 EUR/kg and 9,12 EUR/kg respectively. The flatfish fleet is still making use of the “silent scheme” supported by the EMFF, and in week 19, 74 flatfish cutters stayed in port.

A temporary voluntary fleet tie-up scheme for fishing vessels in the polyvalent, beam trawl and other specific segments of the **Irish fishing fleet** was [announced by the Minister for Agriculture, Food and the Marine](#). This is designed to support fixed costs incurred by owners of fishing vessels while tied up, and will operate over June, July and August, to coincide with the monthly fisheries quota management periods, in order to adjust the supply of fish coming into a currently depressed market and protect quota availability for later in the year.

<sup>19</sup> Weekly data on first sale are conceived to be disseminated as rapidly as possible. For this reason, they only cover some representative products in a selection of locations in some countries. They do not aim to give complete coverage of the market, and so it is recommended to use them as a mere indication of ongoing trends. For more information on species, countries and locations covered, please see [here](#).



## AQUACULTURE

### PRODUCERS TARGETING HORECA AND EXPORT MARKETS ARE STRUGGLING WITH UNCERTAINTY OF FUTURE PROSPECTS

According to industry sources, the **Greek seabass and seabream** farming industry, selling a large share of their production to the HORECA segment, is facing some challenges. As HORECA is almost non-existing, prices are low for large sized fish (600 grams+), a product that normally achieves high prices. Overseas export markets (mainly the US) are virtually closed with logistic costs at 6,00 EUR/kg or higher. Reduction in sales volumes (estimated between 20-30% in 2020 compared with 2019) will most likely cause challenges for the industry as biomass is building up. The most important challenge is, however, the uncertainty related to future market conditions. This, combined with current financial challenges, may lead to drop in stocking.

In **Italy**, seabass and seabream farmers are managing to sell their products, especially when already selling to supermarkets and used to requirements of processed and pre-packed products. However, shellfish farming, freshwater aquaculture and producers that used to sell their products to HORECA or export markets are [struggling to find outlets](#).

The **mussel** farming sector has been experiencing a drop of demand since the beginning of the crisis, with up to 80%-decrease of sales. Producers expect that the summer season and the comeback of tourists in coastal regions will allow them to sell their production especially in France and Italy where [many companies are facing financial problems](#).



## WHOLESALE

### STRONG PRICE INCREASE OF ANCHOVY IN SEVERAL MS BUT VARIOUS PRICE TRENDS FOR OTHER SPECIES

In **Rungis (France)**, prices of fresh fish have been fluctuating for many main species in week 19 compared to week 18. Increases were reported for anchovy (+18%), wild-caught seabass (from +10-12% for seabass caught with trawl to +25-35% for seabass caught with hooks), monk tail (+22-39%), red mullet (+36-43%) and sardine (+12-22%). Decreases were reported for brill (-10-15%), sole (-10-24%), turbot (-24%), cod (-9-12%), and pollack (-24-31%).

In **Rome (Italy)**, prices have been stable in week 19 (8<sup>th</sup> May compared to 30<sup>th</sup> April), at the exception of increasing prices for anchovy (+33%), possibly related to lower supplies and higher demand due to reopening of take-away restaurants. In **Milan**, purchases [have been increasing](#) in the week 18, but are still at 50% of the pre-lockdown levels.

At **Mercamadrid (Spain)**, anchovy and hake prices strongly increased, whereas price decreases were reported for sole and monk (12<sup>th</sup> May against 5<sup>th</sup> May).



## RETAIL & CONSUMPTION

### SEVERAL CAMPAIGNS TO EAT LOCAL FISH

In order to support local brown crab fisheries in **Ireland**, severely impacted by the COVID-19 lockdowns, [Board BIA \(the Irish Food Board\) has launched promotion campaigns](#) in supermarkets, making products and information available for consumers.

As in France, the **Italian** fishery organizations wants to promote domestically caught products to support the fishery sector facing difficulties, with promotional campaigns or a “[made in Italy](#)” label.

In **Germany**, in the first quarter of 2020, an 11% increase of household purchases of fish [has been reported](#) compared to last year (+25% for canned fish, +14,2% for frozen fish products), as well as a strong [increase of salmon consumption](#).

In **Spain**, [retail sales](#) of fresh and frozen fish were more than 20% higher in week 17 compared with the same week last year. Moreover, open-air restaurants are reopening in several regions, [raising expectations in the fishery sector](#).



## TRADE AND LOGISTICS

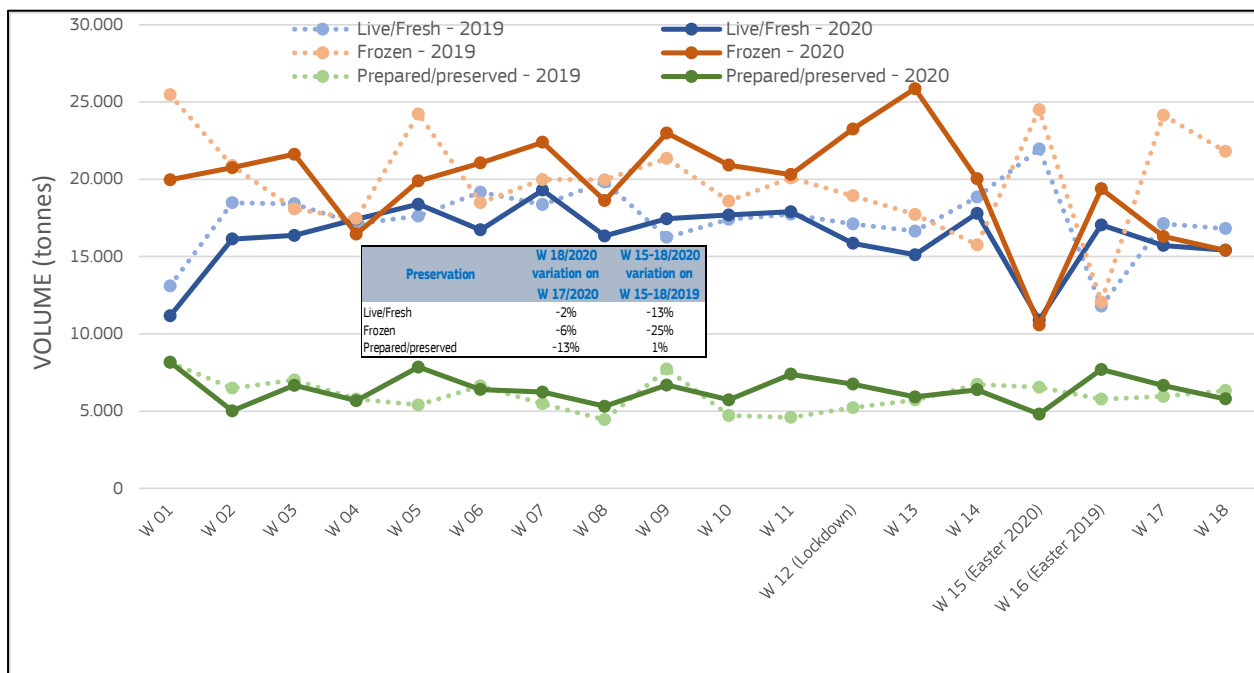
### MAIN EU IMPORTS CONTINUED TO DECLINE IN WEEK 18

In week 18 of 2020, extra-EU imports of major species from main suppliers totalled 37.441 tonnes and EUR 154 million. Compared with week 17, this represented declines by 6% in volume and by 11% in value. If compared with the beginning of lockdown<sup>20</sup>, volumes fell by 23% and values dropped by 30%, mainly due to frozen products.

Seven products accounted for almost 60% of the volume-decrease from week 17 to week 18: sardine from Morocco (16%), squid from the Falkland Islands (14%), salmon from Norway (8%), warmwater shrimps from Ecuador (8%), yellowfin tuna from Ecuador (4%), mackerel from Iceland (4%) and squid from India (4%).

<sup>20</sup> As also shown in the charts, week-12/2020 is assumed as reference starting week of market effects deriving from lockdown.





**Alaska pollock:** from week 17 to week 18, 40% increases in both volume and value, driven by supplies from China. The average import price grew by 2%, to reach 2,84 EUR/kg, despite a slight appreciation of CNY against EUR.

**Warmwater shrimps:** from week 17 to week 18, imports of frozen products from Ecuador fell by 35% in both volume and value terms, and the average import price decreased by 2% (from 5,54 EUR/kg to 5,44 EUR/kg), also linked to the slight USD appreciation against EUR.

**Sardine:** from week 17 to week 18, Moroccan supplies of sardine, largely comprising prepared/preserved products, dropped by 80%. Thanks to a 42% price-increase (which rose from 1,75 EUR/kg to 2,49 EUR/kg), the decrease in terms of total value was by 72%.

As China re-opens, **Ireland** is experiencing increase in interest from the **Chinese market** for shellfish. However, logistic costs are at a high level (around 3,50 EUR/kg for air freight for fresh/live lobster and brown crab, with all other transport and handling costs to be added), and sales are still low. For Irish exporters, a new direct passenger flight from Ireland to China could contribute to lower air freight cost.

**EU imports of fresh gilthead seabream from Turkey** is on the rise. In week 18, they amounted to 686 tonnes, about 100 tonnes lower than in the corresponding week in 2019. Italian imports totalled 200 tonnes - the same level as seen before the lockdown. A slight upward import price trend was observed over the last 3 weeks. EU imports of **European seabass** increased from 235 tonnes in the week of lockdown to 450 tonnes in week 18.

According to DB Schenker, due to increased airfreight capacity over the past weeks, airfreight costs on several routes are now about half what they were directly after the restrictions were imposed in Europe and the USA. As transport of *inter alia* medical supply from China to Europe have increased, the price of return-freight to China has decreased. There are flights between Europe and the USA, but as the demand for return-freight to Europe is low, the airfreight cost is still relatively high<sup>21</sup>.

From 26<sup>th</sup> April to 3<sup>rd</sup> May, EUR depreciated against currencies of the main suppliers: USD (-1%), NOK (-2%), CNY (-1%), GBP (-1%) and ISK (-0,5%). At the same time, marine fuel prices<sup>22</sup> in

<sup>21</sup> <https://ilaks.no/kostnadene-for-flyfrakt-er-halvparten-av-hva-de-var-da-pandemien-forst-brot-ut/>

<sup>22</sup> Source: MABUX. As data for Saturdays and Sundays are not available, prices analysed for 2020 refer to the following days: 27<sup>th</sup>, 28<sup>th</sup>, 29<sup>th</sup>, 30<sup>th</sup> April and 1<sup>st</sup> and 4<sup>th</sup> May.



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Europe remained flat, averaging at 0,20 EUR/litre (which is around 60% lower than the same period in 2019). The lowest were registered in Belgium, Greece, and the Netherlands (0,16 EUR/litre in each country), and the highest in Spain (0,27 EUR/litre).

To learn more about the market situation, [you can access the most recent weekly data \(up to week 18 of 2020\) on extra EU imports in Europe](#).

# Coronavirus response

## EUMOFA's weekly data and trends analysis

### Week 20



#### FISHERIES

#### CONTINUED RECOVERY OF FISHING ACTIVITY WITH MIXED EFFECTS ON PRICES<sup>23</sup>

In **Spain**, in Galicia, the [mackerel campaign ended while that of sardine started](#). In [Galician auctions](#), mackerel prices averaged at 1,03 EUR/kg so far in 2020, which was 33% lower compared to 2019 campaign (when catches were about half) and 3% higher than in 2018 (when catches were higher).

In **France**, several long-trip trawlers went back fishing in the Channel targeting whitefish rather than [monk for which demand is still low](#). [FranceAgriMer](#) data on weekly auction sales (excluding the Mediterranean seaboard) shows a 19%-decrease in volume for the 31 main species from week 19 to week 20. The average price slightly decreased (-7%) mostly because of the decreased share of higher valued species, although decreased sales volumes for several main species led to significant price increases (+62% for haddock, +97% for whiting, +19% for rays, +44% for sardine).

In [five auctions](#) in **Denmark** (Hanstholm, Hirtshals, Strandby, Grenaa and Skagen), total sales were higher in week 20 compared to week 19, but prices continue to rise: the weekly average price increased by 21%, ending at 2,47 EUR/kg<sup>24</sup>. [The Danish Fishermen's Producer Organisation](#) (DFPO) has yet again prolonged its recommended limitations to the fishery of Norway lobster at the same level as in week 17.

In **Dutch auctions**, first-sale prices have increased two weeks in a row (week 19 and 20). That of common sole in week 20 increased to reach the same level as in 2019 and 2018. For plaice, brill and turbot, prices seem to be recovering but are respectively still around 10%, 12% and 35% lower than in week 20 of previous two years. For week 21, the POs have removed the restrictions on fishery efforts for sole, but kept those on shrimp and Norway lobster fisheries.

<sup>23</sup> Weekly data on first sale are conceived to be disseminated as rapidly as possible. For this reason, they only cover some representative products in a selection of locations in some countries. They do not aim to give complete coverage of the market, and so it is recommended to use them as a mere indication of ongoing trends. For more information on species, countries and locations covered, please see [here](#).

<sup>24</sup> Exchange rate : 1 DKK = 0,1341 EUR



## AQUACULTURE

### SALMON: SPIKES IN NORWEGIAN SALMON PRICES

Spot prices of **Norwegian salmon** have trended up in the 2<sup>nd</sup> half of week 20 and prices of fresh whole salmon to be delivered in the beginning of week 21 continued up to a level between 5,70 EUR/kg and 5,90 EUR/kg for 3-6kg-sized salmon. This is the [highest price level since early March](#).

The **Scottish Salmon Producers Organisation** stated that [Scottish salmon exports](#) in Q1-2020 were 40% and 34% lower, respectively in volume and value (measured in GBP), than in Q1-2019. The decline was felt sharply in March as COVID-19 virus took hold in several major markets.



## PROCESSING

### RETURN TO A STABLE LEVEL OF FRENCH AND GERMAN INDUSTRIES

[The seafood processing industry in France](#) is operating at close to normal capacity. Also, the largest processors of smoked salmon are processing salmon at normal seasonal pace. The shift towards pre-packed products continues and in many grocery stores, pre-packed salmon and cod have gained more shelf space. In addition, most of the fresh fish counters have now been reopened.

In **Germany**, [according to one of the main frozen seafood companies \(Nomad Foods\)](#), the supply of raw material has not been affected by the crisis, although the year started with rising prices. Nomad Foods' 13 production plants are open and operating thanks to the early measures implemented to protect employees. After exceptional sales increase in mid-March, frozen seafood consumption returned to a stable level, but still 20% higher than in 2019.



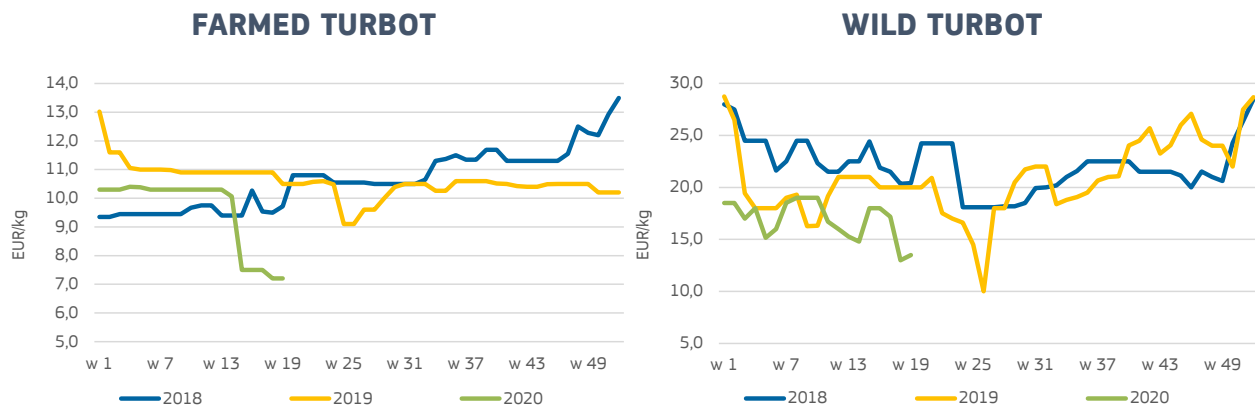
## WHOLESALE

### DOUBLING PRICE OF ANCHOVY IN ITALY

In [Rungis \(France\)](#), the market keeps recovering with increased sales. Prices have been relatively stable except some fluctuations for several main species in week 20 compared to week 19. Price increases have been reported for sole (+10-16%), squid (+12%), and lemon sole (+16-24%). Price decreases have been reported for red mullet (-39-47%), salmon (-4-9%), saithe (-4-9%), hake (-5-10%) and pollack (-13-16%).

In **Rome (Italy)**, prices have been stable in week 20 (08.05 compared to 30.04), at the exception of a sharp increase for anchovy (+100%), possibly related to lower supplies and higher demand.

At **Mercamadrid (Spain)**, swordfish, turbot and monkfish prices increased whereas price decreases were reported for hake and anchovy (19.05 against 12.05). Fish species typically consumed **out of home** are still not in demand on the **Spanish market** as restaurants are still closed. Prices of wild turbot dropped significantly over the past two weeks against higher sales quantity. Despite prices of farmed turbot for some weeks have trended on a historical low level, sales have remained stable – on the same level as in the previous two years.



#### RETAIL & CONSUMPTION

### GROWTH OF FISH CONSUMPTION AT HOME IN SPAIN

**Fish consumption in Spanish households** continued to grow in the seventh week of lockdown (week 18: April 27 to May 3). Consumption increased by 31% from 2019: increases were observed for fresh fish (+33%) and frozen fish (+41%). Canned fish and shellfish grew more moderately (+13%).



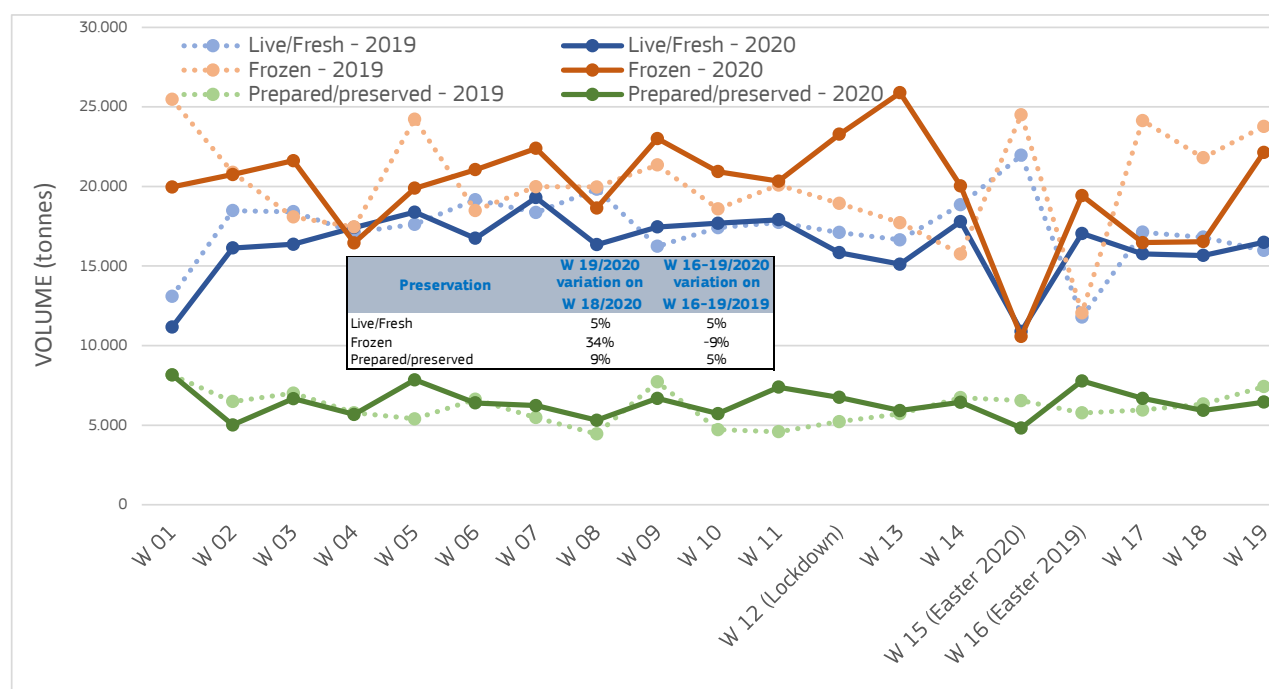
#### TRADE AND LOGISTICS

### EU IMPORTS INCREASED BUT WERE LOWER THAN LAST YEAR

In week 19 of 2020, extra-EU imports of major species from main suppliers totalled 45.791 tonnes and EUR 183 million (+18% in volume and +14% in value from week 18, by -5% in volume and -16% in value if compared with the week when the lockdown began<sup>25</sup>).

<sup>25</sup> As also shown in the charts, week-12/2020 is assumed as reference starting week of market effects deriving from lockdown.

Six products accounted for more than 60% of the volume-increase from week 18 to week 19: herring from Norway (17%), Alaska pollock from China (12%), hake from Namibia (10%), salmon from Norway and sardine from Morocco (8% each) and squid from Falkland Islands (7%).



## MAIN TRENDS FROM WEEK 18 TO WEEK 19

**Alaska pollock:** driven by doubling supplies from China, imports grew remarkably in both volume and value (+115% and +119%, respectively). The average import price rose from 2,84 EUR/kg to 2,89 EUR/kg.

**Squid:** imports doubled (+99% in volume and +108% in value), mainly due to increased supplies from the Falkland Islands, which were three times those recorded in the previous week. The average import price increased by 5% (from 3,41 EUR/kg to 3,57 EUR/kg).

**Miscellaneous shrimps:** imports of prepared/preserved miscellaneous shrimps decreased by almost 30% in both volume and value, due to a fall of supplies from Greenland. The average import price moved from 7,84 EUR/kg to 7,69 EUR/kg (-2%).

From 3<sup>rd</sup> to 10<sup>th</sup> May, EUR appreciated against GBP (+2%) and depreciated against ISK (-1%), while it remained stable against currencies of other main suppliers (USD, NOK and CNY). At the same time, marine fuel prices<sup>26</sup> in Europe increased by 5%, moving from 0,21 EUR/litre to 0,22 EUR/litre (which is around 60% lower than the same period in 2019). The lowest were registered in Belgium, Italy and the Netherlands (0,19 EUR/litre in each country), and the highest in the UK (0,24 EUR/litre).

To learn more about the market situation, [you can access the most recent weekly data \(up to week 20 of 2020\) on extra EU imports in Europe.](#)

<sup>26</sup> Source: MABUX. As data for Saturdays and Sundays are not available, prices analysed for 2020 refer to the following days: 5<sup>th</sup>, 6<sup>th</sup>, 7<sup>th</sup>, 8<sup>th</sup>, 11<sup>th</sup> and 12<sup>th</sup> May.

# Coronavirus response

## EUMOFA's weekly data and trends analysis

### Week 21



FISHERIES

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#### INCREASING FIRST-SALES VOLUMES IN FRANCE AND DENMARK<sup>27</sup>

In **France**, [FranceAgriMer](#) data on weekly auction sales (excluding the Mediterranean seaboard) show that for the 31 main species, the overall trend in week 21 compared to week 20 is a significant 24%-increase of volume due to remarkable increases for most species (especially sardine and mackerel). However, the average price increased a slight 3%, mostly because of decreased sales of some lower valued species (especially scallop and saithe) and significant sales increases of some higher valued species (rays, Norway lobster, monk, pollack, sole, etc.). The volume-increases of small pelagics resulted in price decreases for sardine and mackerel (-11% and -37%, respectively). In the Mediterranean seaboard, the [bluefin tuna campaign](#) started on May 26<sup>th</sup> and should last 5 weeks, with an increased quota but concerns about possible lower prices.

In [five auctions](#) in **Denmark** (Hanstholm, Hirtshals, Strandby, Grenaa and Skagen) first-sale volume increased by 23% in week 21 compared to week 20. The first-sale value only increased by 15%, leading to a general decrease in the average price (total value/total volume). Higher volumes of saithe and pollack were the main contributors to the price decrease, while the weekly average price for other main species (plaice, cod, Norway lobster, hake and monkfish) were stable compared to the previous week. [The Danish Fishermen's Producer Organization](#) (DFPO) recommended an increased weekly allowable catch of Norway lobster for all vessel sizes for week 22.

In **Ireland**, due to the closure of HORECA, markets and other outlets, the price drop across many popular species has been between 50-70% over the last few weeks. The Killybegs Fishermen's Organisation (KFO) is [calling for better governmental support](#) during the COVID-19 crisis while describing the [voluntary fleet tie-up scheme](#) inadequate to tackle the current issues related to the lack of demand.

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<sup>27</sup> Weekly data on first sale are conceived to be disseminated as rapidly as possible. For this reason, they only cover some representative products in a selection of locations in some countries. They do not aim to give complete coverage of the market, and so it is recommended to use them as a mere indication of ongoing trends. For more information on species, countries and locations covered, please see [here](#).



## AQUACULTURE

### FRENCH SALMON AND TROUT PRODUCER SHIFTING SALES TO PROCESSING AND RETAIL

The owner of **French salmon and trout producer**, AMP Saumon de France, stated in a [news article](#) that the company lost practically 30% of the turnover related to the catering sector, with the shutdown of restaurants, wholesalers and companies like Metro. The company succeeded in shifting lost volumes to smokers and processors, as well as national retailers, which have been promoting French produced aquaculture and seafood.



## PROCESSING

### SPANISH CANNING INDUSTRY EXPECTING A 10% DECREASE OF TURNOVER IN 2020

In **Spain**, the [canned fish organisation ANFACO](#) report a significant increase of canned fish purchases at the beginning of the lockdown (+82% in week 11 compared to same week in 2019). However, consumption has dropped in the following weeks (in March, the sales of canned fish have “only” increased by 21% compared to March 2019). The canning industry fears that many households still have stocks of canned fish and thus the consumption is expected to decrease by the end of the year. In canneries, the implementation of distancing measures has led to more costs and decreased productivity. In addition, the current situation of international trade generates difficulties to access raw material supply, especially for tuna. So, the turnover of the sector is expected to decrease by 10% in 2020.



## WHOLESALE

### MARKET RECOVERY AND STABLE PRICES

In **Rungis (France)**, the market keeps recovering with increased supply and demand. Prices have been relatively stable except some increases for several main species in week 21 compared to week 20: cod 2-4 kg (+81-84%), pollack (+35-60%), sole (+20-34%), brill (+20-27%), John Dory (+13-18%). The only product experiencing a price significant price decrease was imported saithe (-18%).

In **Rome (Italy)**, prices have been stable in week 21 (22.05 compared to 15.05), at the exception of decreased price for anchovy (-25%), and increased price for 4-5 kg salmon (+18%).

At **Mercamadrid (Spain)**, stable prices have been reported for sole, turbot, horse mackerel and mussel, whereas prices have significantly decreased for hake (-18-25%) and swordfish (-19%) and increased for monk (+8%) and anchovy (+20%) (19.05 against 12.05).





## RETAIL & CONSUMPTION

### CHANGES IN CONSUMPTION HABITS

In **France**, e-commerce in the form of click-and-collect and home-delivery has grown rapidly. According to [Nielsen](#), 1,2 million homes tried ordering groceries online during the first week of restrictions. Furthermore, the French are putting more fresh foods in their click-and-collect baskets compared to when they shop in brick and mortar stores. Unsurprisingly, 51% of French respondents said in a recent study they are eating more at home.

In **Germany**, the consumption of [frozen fish and seafood](#) has been increasing. From February to May 2020, sales of frozen fish products in the food retail sector grew significantly compared to last year's same period. In the peak weeks, the increases were between +50% and +80%. Plaice fillets, fish fingers, fried fish and gourmet fillets are among the most preferred frozen fish products.

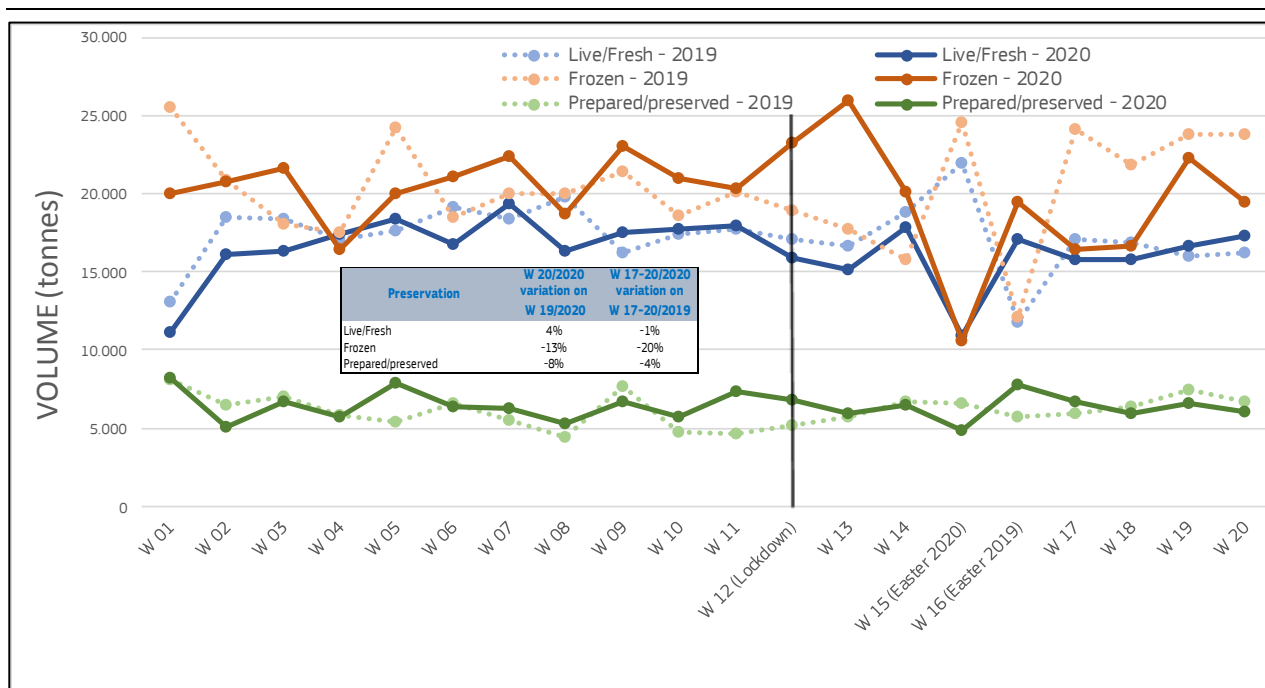
In **Italy**, the [reopening of restaurants](#) is considered as a very good news by the fishery and aquaculture sector, where many small companies are currently struggling with serious liquidity issues. Indeed, in Italy, 55% of domestic catches are consumed out-of-home. However, in the first week of reopening, the consumption in restaurants was still very low (-80% compared to normal level) due to few restaurants opened, fewer customers and the absence of tourists.



## TRADE AND LOGISTICS

### NORMALISATION OF SALMON TRADE MARKET BUT FROZEN IMPORTS STILL DOWN

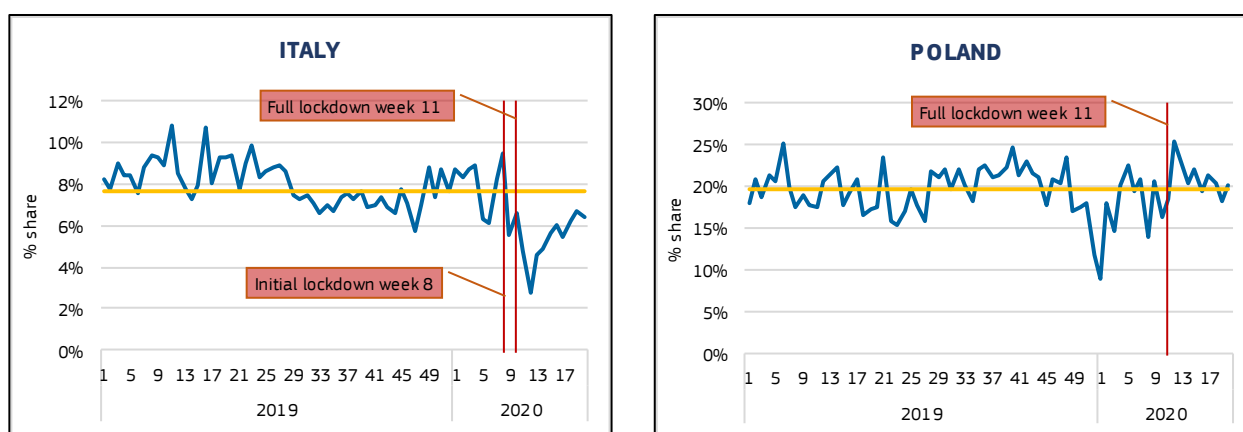
**In week 20 of 2020**, extra-EU imports of major species from main suppliers totalled **43.548 tonnes and EUR 187 million, decreasing 6% in volume and 1% in value compared with week 19. If compared with the week when the lockdown began, volumes declined by 10% and values decreased by 15%**, mainly due to frozen products.



### Week 20–2020 vs. week 19–2020: most relevant trends

**Salmon:** driven by supplies from Norway, imports increased by 4% in volume and 12% in value terms. The average import price increased by 8% (from 5,32 EUR/kg to 5,75 EUR/kg), also due to the appreciation of NOK against EUR (+2%). Norwegian export of fresh Atlantic salmon indicates a slow “normalisation” over the past few weeks. It also shows how the effects of the lockdowns vary across different markets. For example, **Italy** is a typical consumption market for Norwegian salmon and the share of Norwegian exports to the EU destined for Italy decreased dramatically following the initial lockdown in Northern Italy on 22<sup>nd</sup> February (week 8) and the nation-wide lockdown on 9<sup>th</sup> March (week 11). Since week 12–2020, the share has slowly recovered towards the long-term average (week 1 2019 to week 20 2020). **Poland**, on the other hand, is a typical processing market for Norwegian Atlantic salmon. Following the general lockdown in Poland on 13<sup>th</sup> March (week 11), the weekly share of Norwegian exports to the EU destined for Poland has been above the long-term average with a downward trend towards week 20. The increased export volume in week 12 was more than 400 tonnes compared to week 11 (+15%).

**Figure 1: SHARE OF WEEKLY NORWEGIAN EXPORT OF ATLANTIC SALMON TO THE EU DESTINED FOR ITALY (left) AND POLAND (right)**



Source: Norwegian seafood council

**Skipjack tuna:** imports of prepared/preserved skipjack tuna dropped by 23% in volume and 24% in value, driven by a fall of supplies from Ecuador. The average import price declined by 2% (from 3,72 EUR/kg to 3,64 EUR/kg), linked to a depreciation of USD against EUR (-1%).

**Miscellaneous shrimps:** imports of prepared/preserved miscellaneous shrimps decreased by 47% and 46% in volume and value terms, respectively. The average import price moved from 7,69 EUR/kg to 7,94 EUR/kg (+3%). The impact of COVID-19 on the supply of warmwater shrimp is heterogeneous across regions but in general, due to low farm gate prices, full cool storage, lack of containers for storage and export, closed or reduced capacity at ports as well as transport issues for input factors, farmers have reduced stocking during the past 2-3 months. The extent is unknown, but with a production cycle from hatchery to plate of about 5-6 months there is a risk of global supply shortage once demand returns and available inventory (cold/frozen storage) is used up.

**Squid:** imports halved (-56% in volume and -47% in value), mainly due to a fall of supplies from the Falkland Islands, which were more than 70% lower than those recorded in the previous week. The average import price grew by 20% (from 3,57 EUR/kg to 4,27 EUR/kg).

**Hake:** driven by supplies from Namibia, imports grew both in volume and value terms (+18% and +25%, respectively). The average import price recorded a 5% increase (from 3,56 EUR/kg to 3,76 EUR/kg).

From 10<sup>th</sup> to 17<sup>th</sup> May, EUR appreciated against USD and CNY (+1% each) and depreciated against NOK (-2%) and ISK (-1%); the exchange rate between EUR and GBP remained stable. At the same time, marine fuel prices in Europe increased by 4%, moving from 0,23 EUR/litre to 0,24 EUR/litre (which is around 55% lower than the same period in 2019). The lowest were registered in Belgium, Greece and the Netherlands (0,19 EUR/litre in each country), and the highest in Spain (0,30 EUR/litre).

To learn more about the market situation, [you can access the most recent weekly data \(up to week 20 of 2020\) on extra EU imports in Europe.](#)

# Coronavirus response

## EUMOFA's weekly data and trends analysis

### Weeks 22 - 23



#### FISHING ACTIVITIES RECOVERING DUE TO SLOWLY INCREASING DEMAND BUT PRICES STILL LOW, ESPECIALLY FOR EXPORT MARKETS<sup>28</sup>

In **France**, fishing activities have recovered but [demand is still fragile](#) and too low to absorb the increased supplies and imports from neighbour countries, leading to low prices. [FranceAgriMer data](#) on weekly auction sales (excluding the Mediterranean seaboard) show that for the 31 main species, first sales volumes significantly increased in week 22 against week 21 (+17%, mostly due to sardine and to a lesser extent monk, saithe and haddock) but then decreased in week 23 compared with week 22 (-9%, mostly due to sardine). This led the average first sale price to decrease by 23% from week 21 to week 22 (mostly due to the volume effect and the increasing share of sardine) and to increase from week 22 to week 23 (+10%, with most species experiencing price increases and sardine share decreasing).

In **Spain**, [sardine prices dropped in Galicia](#) since the sardine campaign started in Portugal, the first week of June. In A Coruña, the medium sized sardine was sold at 1,50 EUR/kg and the big sized at 3,00 EUR/kg. The first week of June, Galician fishers sold medium sized sardines at 0,40 EUR/kg and big sized ones at 1,50 EUR/kg. The demand is expected to be lower than last year according to Acerga (seiners association of Galicia), due to COVID-19 restrictions making difficult the “sardiñadas” celebrations. In addition, the [anchovy campaign](#) is ending for Cantabrian seiners and prices have been lower than last year, making this year’s campaign hardly profitable.

In [five auctions](#) in **Denmark** (Hanstholm, Hirtshals, Strandby, Grenaa and Skagen), first-sale volumes decreased by 7% in week 22 compared to week 21 and remained stable in week 23 despite a public holiday on Monday 1<sup>st</sup> June. First-sale value decreased by 10% in week 22 but recovered in week 23 (+3%). Fishing activity seems to have increased over the past two months. The total first-sale volume in April and May was more than 50% higher compared to February and March. The main species contributing to this increase were plaice (+184%), saithe (+36%), cod (+86%), hake (+97%) and pollack (+129%).

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In **Ireland**, the situation for the groundfish and shellfish fleets is reportedly depressed. In an attempt to balance the market, fishermen receive public economic support for committing to vessel tie-ups. However, with the amounts received by fishermen being considered too low, fisheries go at sea fishing - with the result that fish is being landed at low prices. Achieved prices by fishermen for cod destined for the French market have been reported as low as 0,40 EUR/kg. The shellfish (crab) market has to some extent picked up. Still, market prices are low – currently around 2,00 EUR/kg, down from around 4,00 EUR/kg last year. Air freight capacity is limited, and the freight cost is still high to the Asian market. Another constraint is the test capacity for issuing veterinary certificates needed for exports to the Chinese market as the tests are conducted by one institution only.

In **the Netherlands**, the situation for fishermen has improved as public economic support measures seem to be effective and prices are currently on an acceptable level. There are currently no fishing restrictions for the flatfish fisheries. However, POs have decided a 60-hour restriction on for shrimp fisheries due to limited capacity at peeling factories in Morocco. As the HORECA segment is slowly opening again, demand for seafood seems to rise. From week 20 to week 23, first sale prices for sole have trended above 12,00 EUR/kg and were around 2,00 EUR/kg for plaice.



## INCREASED SALES OF PRE-PACKED FISH PRODUCTS

**French whitefish supplier Novo Food** said it has seen a [sharp increase in business for pre-packed fish products](#) during the COVID-19 lockdown period, mirroring a national trend in the French market. While trading activity was halved, pre-packed processing was up 20-30%. In their processed product portfolio are cod, saithe, catfish, haddock and farmed salmon.

**Other French companies** are also reporting [the same trend in sales/demand](#). The French seabass, seabream and turbot producer Gloria Maris Groupe moved into production of pre-packed products after seeing its foodservice-orientated business slide by 80% amid the health crisis. French fishing firm Scapeche, which supplies the Intermarché and Netto chains as part of the Les Mousquetaires group, said its production lines for pre-packed fresh fish have been running at full capacity.



## WHOLESALE

### STABLE PRICES ALTHOUGH SLIGHT DECREASES REPORTED

In [Rungis \(France\)](#), the market keeps recovering with increased supply and demand but still low prices due to the low demand from the HORECA sector. Prices<sup>29</sup> have been relatively stable except some decreases for several main species in week 23 compared to week 21: -13-25% for rays, -7-9% for monk, -6-19% for lemon sole, -14% for John Dory, -6% for cod, -3-7% for brill and turbot.

In [Rome \(Italy\)](#), prices have been stable in week 23 (05.06 compared to 22.05), at the exception of decreased prices for anchovy (-30%), and Japanese carpet shell (-10%) due to greater availability on the market.

At [Mercamadrid \(Spain\)](#), in week 23, stable prices have been reported for sole, turbot, horse mackerel and mussel, whereas prices have significantly decreased for Gran Sol hake (-18%) and price of line-caught hake increased (+14%), as well as anchovy (+25%).



## RETAIL & CONSUMPTION

### INCREASED LOCAL SOURCING AND PURCHASES IN SUPERMARKETS

Given the drop in activity and prices in the Spanish fishing sector, [Carrefour](#), with 190 hypermarkets in **Spain**, has reached an agreement, through Puerto Celeiro (a major place for hake first sales in Spain), with a group of Spanish shipowners to buy and market the majority of its production, 200 tonnes during the next three weeks. Through this commitment, more fish will be made available to the end consumer at an affordable price. The species included in the agreement are skewer hake and small whiting. The agreement, set for June, aims to become a permanent collaboration model that helps the sustainability of the Spanish fishing sector.

In the **UK**, the [Morrisons supermarket chain](#) confirmed that they are selling 60% more UK fish than before lockdown. As shopping conditions changed, Morrisons, who source British fish via Falfish in the South-West – have spear-headed the reintroduction of fresh fish sales in supermarkets through developing a British Fish Box, putting a new emphasis on selling UK species. The range of seafood products sold in fish boxes has not been altered from the range offered in fresh fish counters, but the volume has. Behind the 60% increase in sales volume of British fish is ‘phenomenal’ 1400% increase in sales of Dover sole, and an 83% increase in sales of monkfish.

In **Germany**, according to the Gesellschaft für Konsumforschung (GfK), [private household expenditure in Germany on fish and seafood](#) was EUR 456 million in April 2020, surpassing the EUR 432 million spent in December 2019 by EUR 24 million or 5,55%. In April, consumers were

<sup>29</sup> The range of price variations provided for each species corresponds different sizes and origins (France/import).

again oriented towards frozen fish products (+ 16,7%) and fish marinades (+ 26,4%). The purchase volume of canned fish continued to grow disproportionately compared to the same month of the previous year at + 25,4%. Fresh fish (+7,9%) and smoked fish (+ 14,1%) were also in greater demand, although these categories are much more expensive than the other fish products. One reason for this trend is probably the persistently low fish sales in the out-of-home consumption, i.e. foodservice. Indeed, the HORECA sector is slowly recovering but with still low activity. For instance, one week after the restaurants in Baden-Württemberg reopened, three out of four catering businesses were still working below profitable levels.



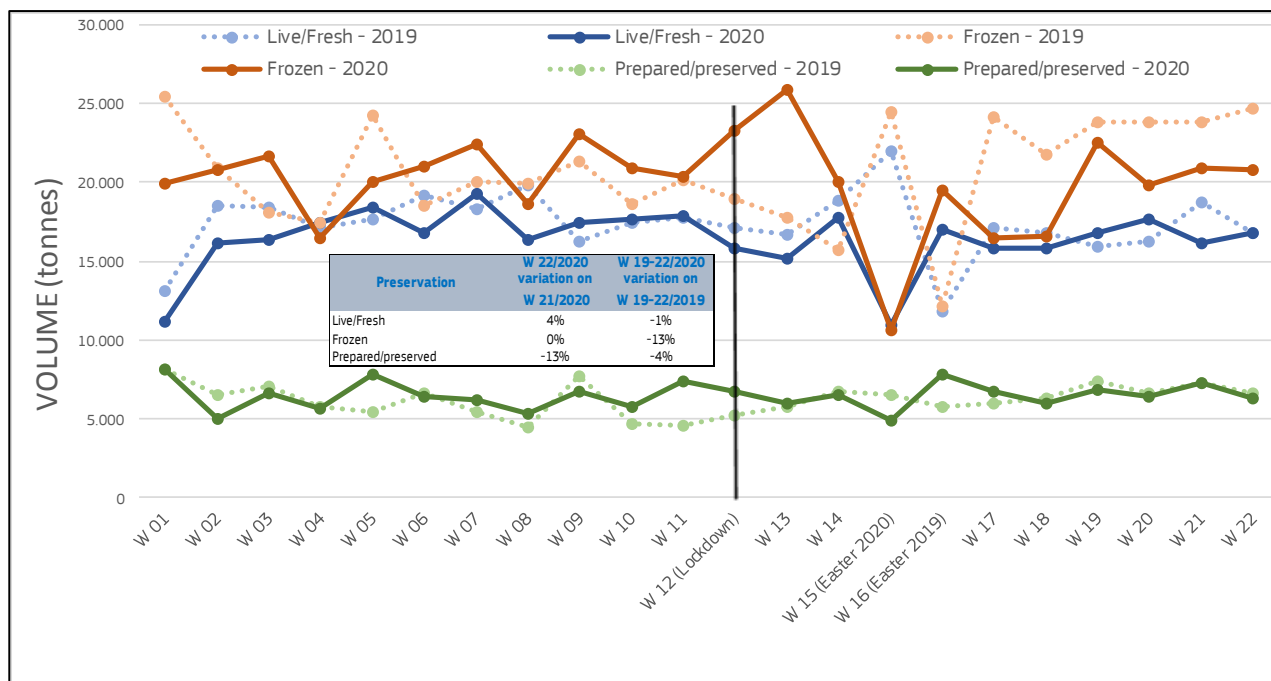
## TRADE AND LOGISTICS

### HIGHER NORWEGIAN EXPORTS IN 2020 DESPITE SLIGHT DECLINE IN APRIL AND MAY / STABLE EU IMPORTS IN WEEK 22

In April, [Norway's seafood exports](#) saw its first decline in value after 18 months, which continued in May. However, seafood exports in the first quarter of 2020 were so above the comparative months of 2019 that the balance for the current year with a value of NOK 44,6 billion (EUR 4,2 billion) was still 3% or 1,5 billion NOK (EUR 141 million) above the previous year's result. The decline in Norwegian exports of fresh whole salmon, clipfish, prawns and king crabs is responsible for the slump caused by the COVID-19 crisis. There is strong demand for pelagic fish products this year. For herring, demand from important markets such as Germany has increased. For mackerel, higher quotas, increased landings from foreign ships in Norway and good demand from main markets such as Japan and South Korea have contributed to the increase. In Poland and Germany, more herring was sold in cans with oil. In 2020, the export price for herring in USD was 17% higher than in the same period in the previous year, and even 34% in NOK. USD mackerel export prices, on the other hand, were 9% lower this year than a year ago, and 1% higher in NOK. The salmon balance is still positive for the first five months: the export volume of 419.000 tonnes is roughly comparable with 2019, the export value of NOK 29.3 billion (EUR 2,8 billion) means an increase of NOK 476 million (EUR 45 million) or 2% - despite a decline in value of 14% in April and still 5% in May.

In **week 22 of 2020, extra-EU imports of major species from main suppliers** totaled 44.865 tonnes and EUR 190 million. With respect to week 21, volume was substantially **stable**, while values decreased by 5% returning to the level of week 20. If compared with the week when the lockdown began, volumes declined by 8% and values decreased by 14%, mainly due to frozen products.





### Weeks 21/22–2020 vs. weeks 19/20–2020: most relevant trends

**Salmon:** due to decreased supplies from Norway, in weeks 21-22 imports followed a downward trend, thus declining by 14% in volume and by 2% in value terms compared with the previous two weeks. The average import price recorded a 15% increase (from an average of 5,54 EUR/kg in weeks 19-20 to 6,34 EUR/kg in weeks 21-22), also due to an appreciation of NOK against EUR occurred in the same two-week period (+4%). Compared with 2019, imports in weeks 21-22 of 2020 were 15% lower both in volume and value. Nevertheless, the import price was stable.

**Skipjack tuna:** driven by a drop of supplies from Ecuador, imports of prepared/preserved skipjack tuna in weeks 21-22 declined by 8% in volume and by 6% value from weeks 19-20. The average import price, which reached 3,76 EUR/kg in weeks 21-22, increased by 1% compared with weeks 19-20. During the two-week period, the USD depreciated against EUR (-4%: -2% from week 20 to 21 and -2% from week 21 to 22). Compared with last year, the decline of imports in weeks 21-22 was of 12% in volume and 1% in value, while the average import price was 10% lower.

**Alaska pollock:** with a strong fluctuating trend, weeks 21-22 showed a slight increase compared with weeks 19-20 (+1% in volume and +3% in value terms). The average import price moved from 2,84 EUR/kg in weeks 19-20 to 2,87 EUR/kg in weeks 21-22 (+1%). With respect to the same weeks last year, the growth in volume and value was relevant (+34% and +55%, respectively), while the import price increased by 15%.

**Miscellaneous shrimps:** imports of prepared/preserved miscellaneous shrimps recorded a significant growth in the last two weeks. Compared with weeks 19-20, they increased by 76% in volume and by 74% in value terms. The average import price decreased by 4% (from 7,81 EUR/kg in weeks 19-20 to 7,52 EUR/kg in weeks 21-22). Compared with the same weeks in 2019, imports decreased by 18% in volume and 26% in value. The average import price decreased by 10%.

**Squid:** driven by fluctuating supplies from the Falkland Islands, imports recorded in weeks 21-22 were about two times than those registered in weeks 19-20 (+204% in volume and +168% in value). The average import price decreased by 15% (from 3,95 EUR/kg in weeks 19-20 to 3,36 EUR/kg in weeks 21-22). Compared with 2019, imports in weeks 21-22 were 42% and 32% lower, in volume and value terms respectively. The average import price was 14% higher.

From 24<sup>th</sup> to 31<sup>st</sup> May, EUR appreciated against USD (+2%) and CNY (+1%) and depreciated against NOK (-3%), ISK and GBP (-1% each). During the following week, EUR appreciated again against USD and CNY (+2% and +1%, respectively) and depreciated against NOK (-3%), ISK and GBP (-1% each).

At the same time, marine fuel prices<sup>30</sup> in Europe were stable, at 0,26 EUR/litre (which is around 50% lower than the same period in 2019). The lowest were registered in Belgium and the Netherlands (0,22 EUR/litre in each country), and the highest in Spain (0,32 EUR/litre).

To learn more about the market situation, [you can access the most recent weekly data \(up to week 23 of 2020\) on extra EU imports in Europe.](#)

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<sup>30</sup> Source: MABUX. As data for Saturdays and Sundays are not available, prices analysed for 2020 refer to the following days: 25<sup>th</sup>, 26<sup>th</sup>, 27<sup>th</sup>, 28<sup>th</sup>, 29<sup>th</sup> May and 1<sup>st</sup> June.

# Coronavirus response

## EUMOFA's weekly data and trends analysis

### Weeks 24 - 25



#### FISHERIES

#### FISHING ACTIVITIES SLOWLY RECOVERING DUE TO MODERATE INCREASE OF DEMAND FROM HORECA<sup>31</sup>

In five auctions in **Denmark** (Hanstholm, Hirtshals, Strandby, Grenaa and Skagen), first sales increased in both week 24 and 25. Volumes increased by 14% from week 23 to week 24, mainly due to higher sales of saithe. In week 25, 191 tonnes of Atlantic herring were sold, causing overall volumes to increase 16% from week 24 and reach its highest level since March (1.217 tonnes). The value increased by 15% and 9% in weeks 24 and 25 respectively. However, due to the increased sales of the lower valued Atlantic herring in week 25, the overall average weekly price (total value/total volume) decreased by 6%. The overall average daily prices showed an increasing trend during week 24 and 25 and increased 21% from Monday 5<sup>th</sup> June to Thursday 18<sup>th</sup> June. However, all the 191 tonnes of Atlantic herring were sold Friday 19<sup>th</sup> June, causing the overall average daily price to drop by 35%.

In **France**, fishing activities and fresh fish markets have been recovering especially since the reopening of restaurants. However, sales and prices for some species are still low and POs have sometimes to [limit catches to maintain profitable prices](#). [FranceAgriMer data on weekly auction sales](#) (excluding the Mediterranean seaboard) show that for the 31 main species, first-sales volumes decreased in week 24 (-11% against week 23, mostly due to saithe and to a lesser extent mackerel, hake and whelk) and significantly increased in week 25 (+25% from week 24, mostly due to monk, hake and sardine). However, average first-sale price slightly decreased by 3% in week 24 compared with week 23 (mostly due to the increasing share of sardine) and increased by 11% from week 24 to week 25 (thanks to higher volumes of valuable species such as monk, hake and rays). [In Normandy, the whelk fishery is suffering](#) from the slow recovery of demand from the HORECA sector, keeping prices low, whereas prices for all other major species have recovered. The closure of restaurants had already led whelk fishers to reduce their activities and to store a significant share of their landings in freezers. Now that freezers are full, a promotional campaign has been launched to try to increase the demand from consumers.

<sup>31</sup> Weekly data on first sale are conceived to be disseminated as rapidly as possible. For this reason, they only cover some representative products in a selection of locations in some countries. They do not aim to give complete coverage of the market, and so it is recommended to use them as a mere indication of ongoing trends. For more information on species, countries and locations covered, please see [here](#).

In **Spain**, in **Galicia**, [Rosa Quintana \(Councillor of the sea in Galicia\)](#) estimated the [economic losses](#) of the fishing sector due to the COVID-19 crisis: EUR 25 million were lost at first-sale level, circa EUR 60 million were lost due to the lack of activity, and the whole maritime industry decline represents more than EUR 500 million loss.

Fishing activities in **Ireland** have increased over the last weeks and fish is currently sold at reasonable prices. The demand for fish sold in retail is decent, meanwhile the HORECA segment is quiet. Market conditions for shellfish has to some extent improved. Market conditions and prices for high priced demersal fish species (species exported to continental EU for the restaurant segment) are still poor, while conditions for demersal species normally achieving lower prices in the market such as haddock and whiting, have improved. The summer fishery for Albacore tuna will start in week 27. A significant share of the demersal fishing fleet participates in the fishery, leading to reduced fish efforts for demersal species in the upcoming weeks.

In the **Netherlands** the herring season ("*hollandse nieuwe*") started on June 12<sup>th</sup>. According to the Dutch Fish Marketing Board the first catch of herrings traditionally auctioned off for charity at a major public event — would instead be presented as a gift to the neighbouring German state of North Rhine-Westphalia (NRW). Some 4.000 new-season herrings are to be delivered to German medics as thanks for treating Dutch COVID-19 patients.



## EU-COUNTRIES SOUGHT TO EASE COVID-19 MEASURES, CHINA TO INTENSIFY

**Italy**, which has been severely affected by the pandemic, has throughout week 23 gradually eased its social distancing measures. This implies that consumers now can consume Atlantic salmon through both restaurants and retailers. This has indeed caused an increase in demand and subsequently the [export volumes of fresh Atlantic salmon from Norway](#) have increased by roughly 60% during the last three weeks.

In **France**, the **shellfish** sector has been faced with diminishing demands due to COVID-19. Although restaurants have reopened in France, the **oyster** sector currently deals with overstock issues, leading to an increased risk of pathogens proliferation in farms and resulting in lower prices. The sector is trying to find alternative outlets such as processing (especially for bigger oysters) or new export markets. For the **mussel** sector, restaurants account for about 20% of mussel sales at national level. However, the lack of demand from this side has had a destabilizing effect on the market, pushing the prices low (source: Cultures marines, June 2020 #337).

Organic salmon farming in **Ireland** has managed fairly well during the pandemic, as market demand has maintained relatively strong. As demand from retail increases, there has been a noticeable switch to frozen fillets.

On Thursday 11 of June in **China**, several Chinese media sources reported that a new eruption of COVID-19 cases was linked to a Beijing's largest food market, Xinfadi. In the act of tracing the source of infection, imported goods was designated as a plausible source. Atlantic salmon of **Norwegian** origin was one of the products that was hypothesized as a potential carrier of

COVID-19 after the disease was detected on a cutting board used on imported fish in Xinfadi. In the aftermath of the allegations, Chinese restaurants put serving of salmon to a halt and salmon products were removed from major supermarkets, which ultimately led to cancellations upon exporters. On Wednesday, 17 of June, the Chinese Center for Disease Control and Prevention deemed that [imported salmon was not the source of infection in the new outbreak in the region](#). It appears as Atlantic salmon of all origins sold on the Chinese market has suffered from the incident. [Exports of fresh whole salmon from Norway to China decreased by 34%](#) in week 24 compared to week 23. Recently, **Chinese** authorities introduced COVID-19 certifications for imports of shellfish and fish. The FAPs must be tested of the COVID-19 virus before being exported to China.



## HALTING PROCESSING SECTOR

In **the Netherlands**, the [shrimp industry is still facing challenges](#) due to the ongoing COVID-19 crisis in Morocco. Morocco has been in a state of emergency from 20<sup>th</sup> March, a situation which will last until July 10. The North Sea shrimp captured by Dutch fishermen is primarily peeled in Morocco, and in order to balance supply to the peeling capacity, fishermen are on a weekly basis instructed on the number of hours they are permitted to fish, which can vary from closure to 72 hours per week.

In **Scotland**, the Scottish Government scheme, funded by the EMFF, has decided to compensate businesses for the cost of transporting, freezing and storing salmon, trout and shellfish until the end of 2020. As aforementioned, there has generally been a [switch from fresh to frozen products](#). The cost of storage is relatively cheap, at £5-£10 per tonne for a 10-week period, whereas the initial blast freezing can cost up to £300 per tonne. According to the Scottish Salmon Producers' Organisation (SSPO), salmon farmers have been able to find new markets for some of their stock but there was still a need for some of them for temporary storage, until overseas markets start to normalise again.



## WHOLESALE

### GENERALLY STABLE PRICES ALTHOUGH INDIVIDUAL FLUCTUATIONS

In **Rungis wholesale market** in **France**, the [market keeps recovering](#) with increased supply and demand especially from restaurants. Prices have been relatively stable over the last two weeks (week 25 compared to week 23) except fluctuations for some major commercial species: increasing prices for 4-5 kg cod (+67%), whiting (+27-44%), sole (+13-42%), mackerel (+30%), and rays (+14-38%), whereas decreasing prices for sardine (-4-10%), bluefin tuna (-19%) and lobster (-6-13%).

In **Rome wholesale market** in **Italy**, prices have been relatively stable over the last two weeks (19.06 against 05.06) except increasing trends for anchovy (+50%, back to April level) and 4-5 kg Norwegian salmon (+14%).

In **Spain**, in **Mercamadrid wholesale market**, [prices have been fluctuating](#) over the last two weeks (23.06 against 09.06): increases for hake, sole, turbot and small horse mackerel and decreases for anchovy, swordfish and mussel.



## RETAIL & CONSUMPTION

### RETAIL SECTOR TO ADAPT

In **Germany**, [the COVID-19 crisis consolidated the Fisch vom Kutter portal](#), allowing the online sale of freshly landed catches from the German Baltic Coast vessels directly to consumers, which has become more popular in the area. The crisis enabled an increase of users, from 500 to 700 users checking the portal daily. Compared to March 2020, the number of visitors increased by 80% at the end of April, and the fishers reported a 10-20% increase in direct sales; the portal now includes a fish farm.

In **France**, fishmongers have specifically suffered from the drop of the demand and the closure of some open markets. The drop of turnover is estimated around 30% over the last three months. [Some of them have tried to adapt and diversify their activities](#): delivery services, and catering services for consumers to eat seafood on the spot.

In **Italy**, according to Coldiretti, although restaurants have been reopened for three weeks, [their activity is still below 50% of the “normal level”](#) especially due to the absence of foreign tourists.

In **Ireland**, restaurants re-open in week 27. There are expectations that the opening will have positive effect on demand.

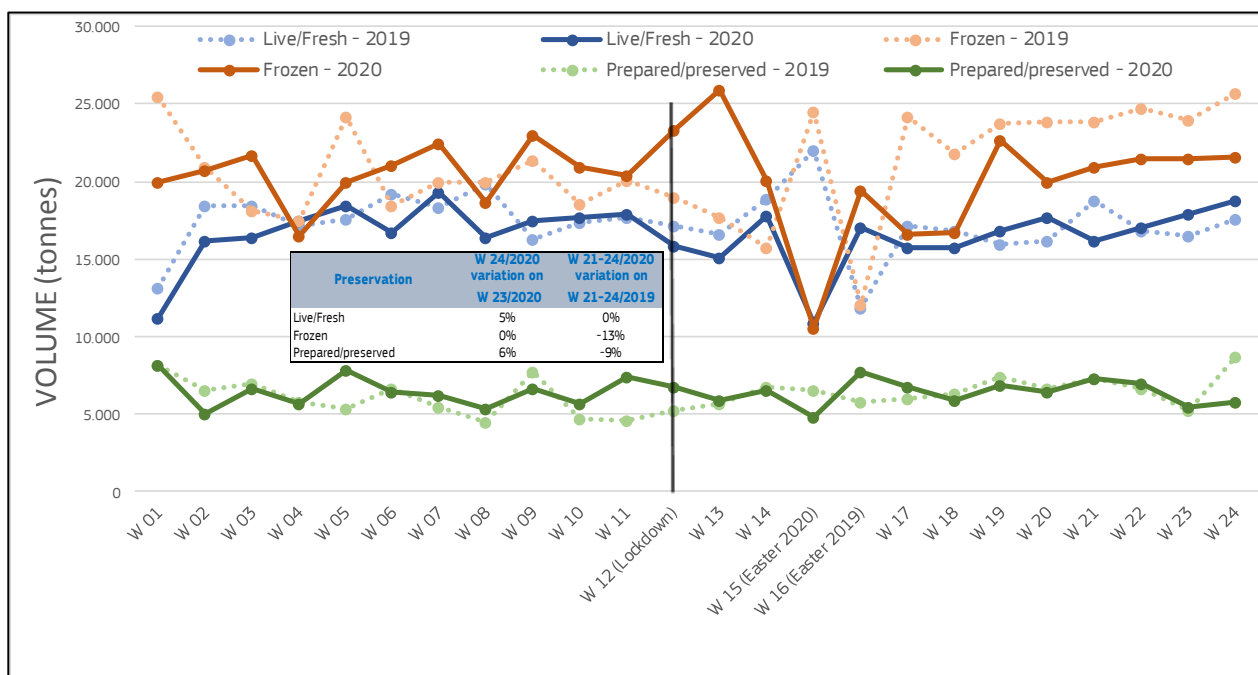


## TRADE AND LOGISTICS

### INCREASED SUPPLY OF MAIN SPECIES, STILL LOGISTICAL CHALLENGES

**Air freight capacity** remain a scarce resource in the global market. The absence of passenger flights combined with shortages of suited aircrafts in addition to lack of pilots, restrict the overall air freight capacity. [According to Accenture's Seabury Consulting](#), the global air freight capacity in week 24 was 25% lower than corresponding week last year. Flights from North America to Latin America decreased by 8%. The Transpacific capacity grew by 3% compared to last year and flight capacity from Europe to Asia declined by 15%.

Whereas main imports of frozen products remained stable, imports of fresh products (mainly fresh/gutted) increased by 5% from week 22 to week 23 and again by another 5% from week 23 to week 24. In the same periods last year, they first decreased by 2% and then, increased by 6%. This is mostly due to increased imports of fresh salmon from Norway that could be linked to the reopening of restaurants in most EU countries.



### Weeks 23-24 of 2020 vs. weeks 21-22 of 2020: most relevant trends

**Salmon:** driven by increased supplies from Norway, in weeks 23-24 imports grew by 7% in volume and by 14% in value terms compared with the previous two weeks. The average import price increased as well, from 6,35 EUR/kg in weeks 21-22 to 6,73 EUR/kg in weeks 23-24 (+6%), although in the same two-week period the appreciation of NOK against EUR was slight (+0,1%). Compared with 2019, imports in weeks 23-24 of 2020 were higher (+7% in volume and +1% in value), while the import price was 5% lower.

**Cod:** increased supplies from Russia made imports of cod in weeks 23-24 grow by 9% in volume and by 12% in value from weeks 21-22. The average import price, which reached 5,42 EUR/kg, was 3% higher than the previous two weeks. Nevertheless, imports of cod were less than those



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registered last year in the same period (-4% in volume and -11% in value); the average import price was 8% lower.

**Alaska pollock:** due to lower supplies from China, imports of Alaska pollock in weeks 23-24 dropped by 25% from weeks 21-22 (both in volume and value), and the average import price remained stable at 2,88 EUR/kg. Compared with the same weeks last year, the fall in volume and value was relevant (-46% and -39%, respectively), while the import price increased by 13%.

**Squid:** compared with the previous two weeks, imports of squid registered in weeks 23-24 decreased by 8% in volume and increased by 3% in value. This was mainly due to lower supplies from the Falkland Islands. The average import price grew by 12% (from 3,36 EUR/kg in weeks 21-22 to 3,75 EUR/kg in weeks 23-24). Compared with 2019, imports were stable in volume terms, while the average import price (and values) increased by 12%.

To learn more about the market situation, [you can access the most recent weekly data \(up to week 25 of 2020\) on extra EU imports in Europe.](#)