

Monthly Highlights

No. 5 / 2020

E U M O F A

European Market Observatory for
Fisheries and Aquaculture Products

In this issue

Over the 36-month period from March 2018 to February 2020, the average first-sales price of European anchovy in Italy was 2,06 EUR/kg. This was 12% higher than the average price in Spain (1,89 EUR/kg), and 8% higher than that of Portugal (1,84 EUR/kg). Among the surveyed countries, the highest average first-sales price (1,63 EUR/kg) for Atlantic mackerel was recorded in Spain. This was 42% higher than in the Netherlands (1,15 EUR/kg), and 29% greater than in Denmark (1,26 EUR/kg).

The price of frozen mackerel fillets from Iceland reached 2,52 EUR/kg in the first week of April (week 14). This represents a 7% decrease from the preceding four-week average (2,70 EUR/kg), and a 20% reduction from the same week in 2019 (3,16 EUR/kg).

Consumers in the Netherlands spent 13,98 EUR/kg on fresh herring on average, while those in Sweden spent more than two times less (6,50 EUR/kg) over the past three years.

In 2017, sales value under GI/TSG in the seafood sector was estimated at EUR 1,42 billion at EU level. This accounted for 3% to 5% of the sales of the EU seafood sector.

COVID-19 lockdowns have led to steep falls in demand for fisheries and aquaculture products globally, affecting production and prices throughout the supply chain.

The European Commission initiative to modify the European Maritime and Fisheries Fund (EMFF) and to mitigate the impact of coronavirus on the fisheries and aquaculture sectors was adopted by the European Parliament.



Analyses of the impacts of the COVID-19 crisis are conducted weekly by EUMOFA and can be accessed [here](#).

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1. First sales in Europe

For the period of **January–February 2020**, 13 EU Member States (MS), Norway, and the United Kingdom reported first-sales data for 10 commodity groups¹. First-sales data are based on sales notes and data collected from auction markets.

1.1. Compared to the same period last year

Increases in value and volume: First sales grew in Greece, Italy, Norway, and the UK. An increased supply of both hake and anchovy were the main factors leading to higher first sales in Greece. Higher supply of squillid was the main reason for the increase in Italy.

Decreases in value and volume: First sales declined in Denmark, France, and Sweden. In France it was mainly due to a decline in sardine and ling supply. The decrease in Denmark was due to herring and mussel *Mytilus* spp.

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

Country	January–February 2018		January–February 2019		January–February 2020		Change from January–February 2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	2.767	10,21	2.589	9,59	2.246	10,66	-13%	11%
Denmark	43.647	54,04	49.077	53,43	28.835	42,98	-41%	-20%
Estonia	10.677	2,04	11.103	2,00	8.415	2,52	-24%	26%
France	29.513	104,27	32.294	106,15	27.561	96,51	-15%	-9%
Greece	2.176	5,86	2.531	6,69	3.157	8,48	25%	27%
Italy**	10.214	40,11	10.538	44,68	11.763	47,17	12%	6%
Latvia	10.475	1,92	9.929	1,71	7.708	1,42	-22%	-17%
Lithuania	428	0,44	233	0,27	325	0,21	40%	-23%
Netherlands	42.357	66,29	31.020	53,88	33.863	52,31	9%	-3%
Norway	586.399	475,82	440.930	363,36	449.597	425,09	2%	17%
Poland	30.012	8,42	21.861	5,61	19.283	4,66	-12%	-17%
Portugal	10.604	26,59	13.358	32,30	8.308	28,09	-38%	-13%
Spain	49.791	166,60	60.193	192,90	58.913	194,02	-2%	1%
Sweden	61.996	21,01	54.262	18,82	22.000	10,79	-59%	-43%
UK	54.508	85,11	61.078	120,18	62.651	111,88	3%	-7%

Source: EUMOFA (updated 16.04.2020). Possible discrepancies in % changes are due to rounding.

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

** Partial data: first-sales data for Italy cover 229 ports (approximately 50% of the total landings in the country).

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



1.2. In February 2020

Increases in value and volume: First sales grew in Greece, Norway, Spain and the UK. The increase in Spain was due to an increase in the supply of yellowfin tuna and sardine.

Decreases in value and volume: First sales declined in Denmark, Estonia, France, Latvia, Poland, Portugal, and Sweden. In Portugal, the decline was due to a decline in the supply of anchovy and octopus. In Poland, first sales decreased due to a reduced supply of European flounder.

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

	February 2018		February 2019		February 2020		Change from February 2019	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.042	4,42	1.123	4,52	924	4,93	-18%	9%
Denmark	19.259	24,70	20.694	21,75	12.085	15,26	-42%	-30%
Estonia	4.859	0,96	4.894	0,90	2739	0,64	-44%	-29%
France	14.944	49,56	16.646	53,14	13.021	45,48	-22%	-14%
Greece	968	2,62	1.417	3,69	1.559	4,22	10%	14%
Italy**	4.353	17,92	5.389	22,67	5.512	22,31	2%	-2%
Latvia	5.375	1,01	5.172	0,88	3.888	0,72	-25%	-18%
Lithuania	258	0,24	108	0,13	191	0,09	76%	-26%
Netherlands	30.195	42,05	19.668	30,56	21.396	29,99	9%	-2%
Norway	380.058	294,81	236.380	201,97	279.367	255,10	18%	26%
Poland	16.169	4,65	12.330	3,16	12.218	2,94	-1%	-7%
Portugal	4.822	12,64	6.794	16,20	4.408	14,69	-35%	-9%
Spain	25.626	78,41	31.655	89,91	32.765	97,78	4%	9%
Sweden	34.456	10,93	29.828	9,67	10.545	5,08	-65%	-47%
UK	54.508	85,11	61.078	120,18	29.494	49,66	42%	12%

Source: EUMOFA (updated 16.04.2020). Possible discrepancies in % changes are due to rounding.

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

**Partial data: first-sales data for Italy cover 229 ports (approximately 50% of the total landings in the country).

The most recent weekly first-sales data (up to week 21 of 2020) are available via the EUMOFA website, and can be accessed [here](#).

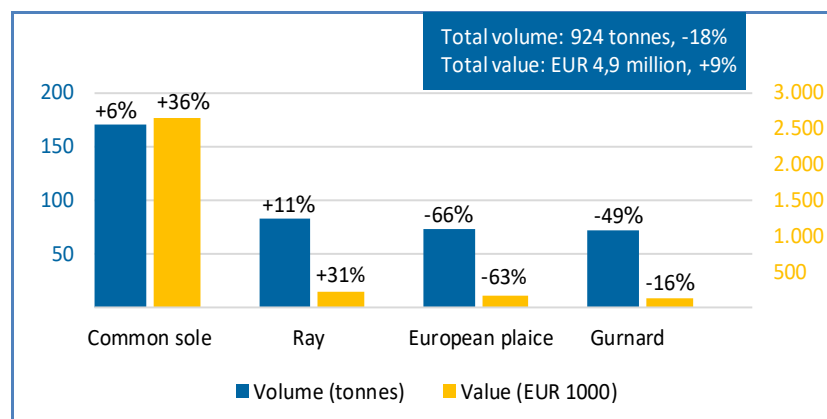
The most recent monthly first-sales data for March 2020 are available via the EUMOFA website, and can be accessed [here](#).



1.3. First sales in selected countries

 In **Belgium** in **January–February 2020**, first-sales value increased by 11% due to common sole. Volume fell by 13% relative to the same period of the previous year, largely driven by decreases in European plaice. In **February 2020**, the same species were responsible for similar trends in both value and volume relative to February 2019. Ray also experienced a significant first-sales increase in value, while gurnard and European plaice were among those with the highest decrease in volume.

Figure 1. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM, FEBRUARY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).


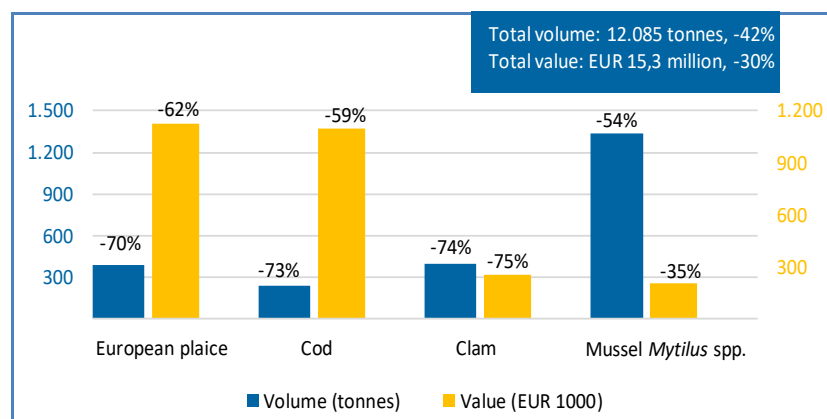
 In **Denmark** in **January–February 2020**, herring was the main responsible for a first-sales decrease of 20% in value and 41% in volume, compared to January–February 2019. In **February 2020**, first sales decreased in both value and volume, compared to February 2019. European plaice, cod, clam, mussel *Mytilus* spp. and herring were the primary species responsible for this declining trend. The main reason behind the clam decrease is the scarcity of the resource, mostly due to natural fluctuation of the stock.

Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, FEBRUARY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).


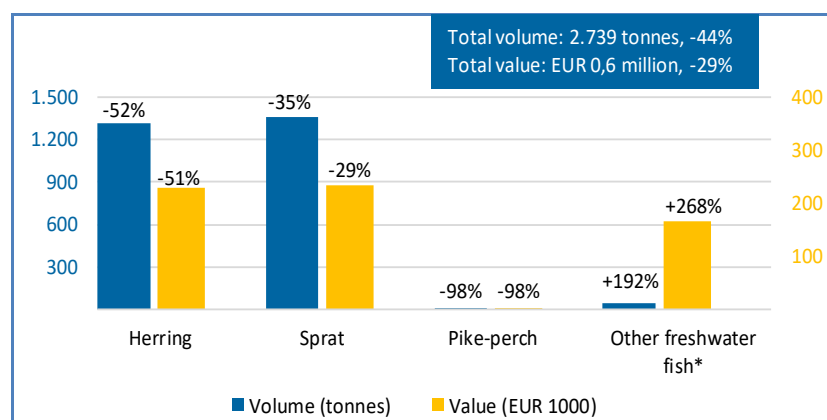
 In **January–February 2020**, **Estonia** saw growth in first-sales value (+26%, due to pike-perch), while first-sales volume decreased (-24%, mainly due to lower supplies of herring and sprat) compared to January–February 2019. In **February 2020**, first sales were lower in both value and volume than they had been during the same month in 2019. This was primarily due to a lower supply of herring and sprat, the species which accounted for 98% cumulatively of the total first-sales volume in February 2020.

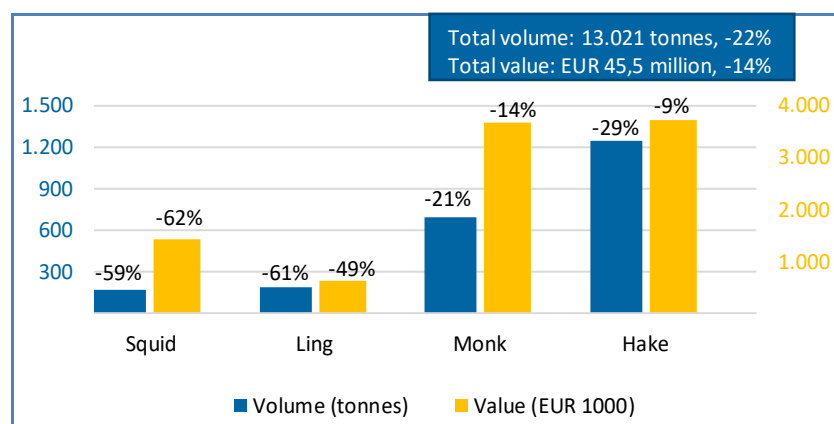
Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, FEBRUARY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).
*EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

**In France in
January–February**

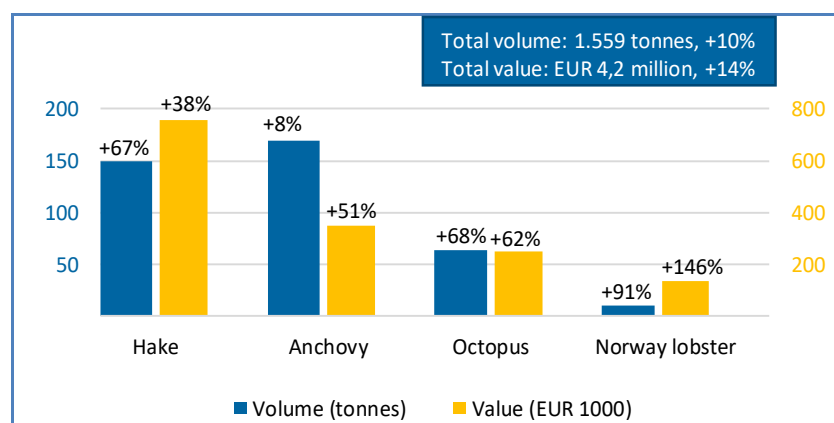
2020, first sales decreased by 9% in value and 15% in volume compared to January–February 2019. The value decline resulted from decrease in supply of squid, while volume fell mainly due primarily to hake, whiting, and squid. In **February 2020**, relative to February 2019, decreases in value for squid, ling, monk, and in volume for hake, were among the key reasons for negative first-sales trends. Of these key species, ling registered the most significant increase in average price (+30%), reaching 3,31 EUR/kg.

Figure 4. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, FEBRUARY 2020

Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).

**In Greece in
January–February**

2020, both first-sales value and volume increased (+27 and +25%, respectively) due to higher supplies of hake and sardine relative to January–February 2019. In **February 2020**, first-sales value and volume were higher than in February 2019. This growth was driven by hake, anchovy, octopus, and Norway lobster. The hake increase is linked with a potentially good status of stocks whose biomass has been increasing since 2014². Of these species, anchovy recorded the highest increase in average price, reaching 2,06 EUR/kg (+40%).

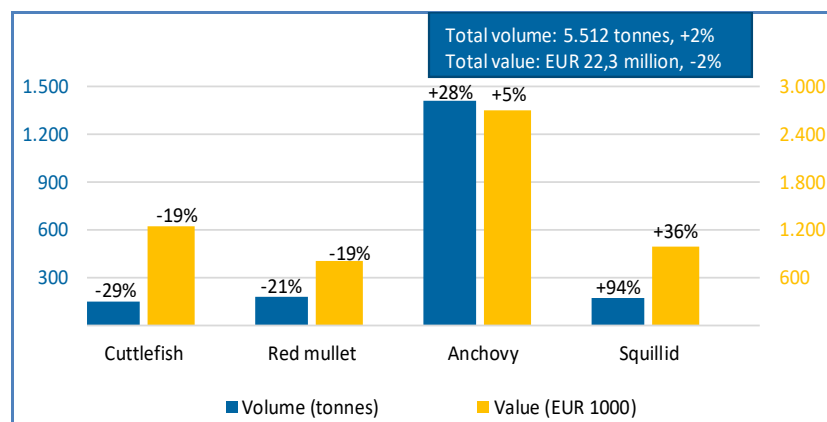
Figure 5. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GREECE, FEBRUARY 2020

Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).

² STECF 18-16, <https://op.europa.eu/en/publication-detail/-/publication/bd40eef1-072e-11e9-81b4-01aa75ed71a1/language-en/format-PDF>

In **Italy** in
January–February

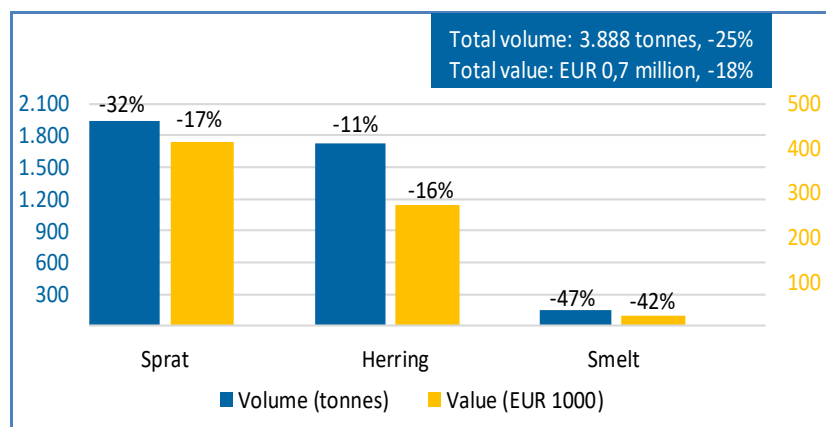
2020, first sales grew by 6% in value and 12% in volume relative to the same period of the previous year. Increases in value of squillid and Norway lobster, as well as higher volumes of anchovy and deep-water rose shrimp, were the main drivers behind the upward trend. In **February 2020**, first sales decreased in value and increased in volume relative to February 2019. Decreased first-sales value of cuttlefish, red mullet and octopus, and increased first-sales volume of anchovy and squillid that recorded increase in biomass, were the main drivers behind these trends.

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, FEBRUARY 2020**

Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).

In **Latvia** in
January–February

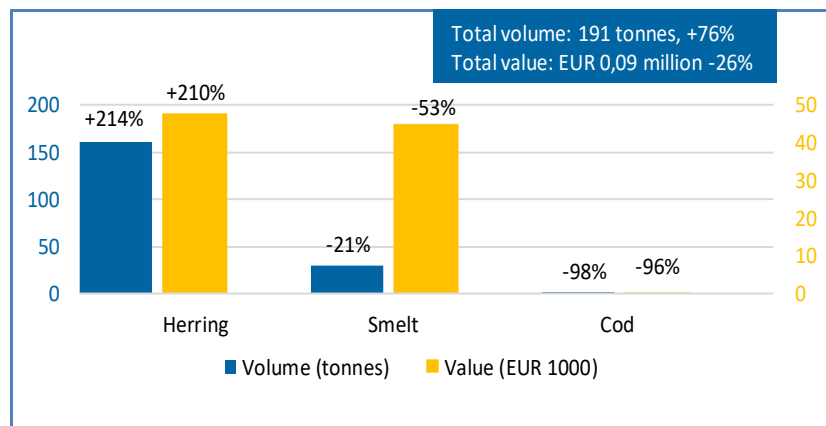
2020, sprat and herring were the key species responsible for decreases in first-sales value (-17%) and volume (-22%) relative to January–February 2019. In **February 2020**, first-sales value and volume continued to decline due to sprat, herring and smelt. The average price of sprat increased by 22% to 0,21 EUR/kg, due to reduced supply and stable market demand.

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, FEBRUARY 2020**

Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).

In **Lithuania** in
January–February

2020, first-sales value decreased by 23% due to smelt. An increase of 40% was recorded in first-sales volume, due to an increased supply of herring, which more than doubled compared to January–February 2019. In **February 2020**, first sales experienced similar trends due to the same species compared to February 2019. The overall value fell due to smelt, while volume increased due to a 214% rise in the supply of herring, which was the result of changing procedures by a company that transports herring catch, i.e. changing the place of first sales from Latvia to Lithuania by a Latvian company.

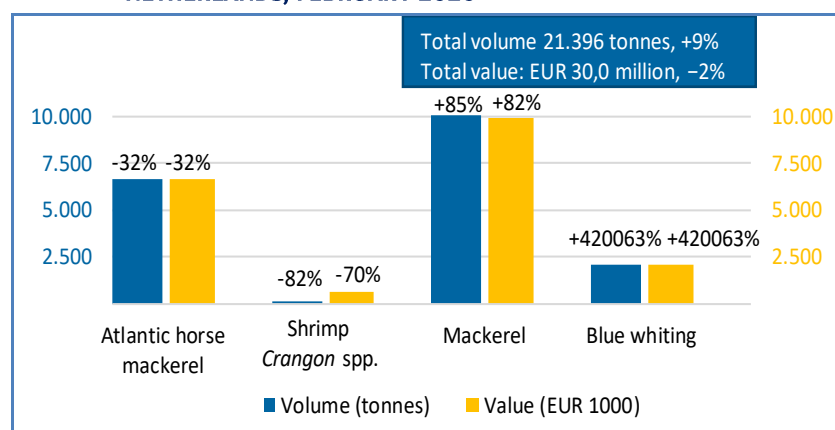
Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, FEBRUARY 2020**

Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).



 In the **Netherlands** in **January–February 2020**, first sales decreased by 3% in value and increased by 9% in volume compared to January–February 2019. In **February 2020**, first sales exhibited similar trends, with value falling and volume increasing relative to February 2019. This was mainly due to the values of Atlantic horse mackerel, shrimp *Crangon* spp. and common sole, and the volumes of mackerel and blue whiting. Good stock status and increased quota were behind mackerel increases, while huge sales increases for blue whiting are reflecting the natural fluctuation of the stock (blue whiting sales are subject to very high seasonal variation). Of major species, shrimp *Crangon* spp. recorded the highest price increase of 68%, reaching 4,40 EUR/kg.

Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, FEBRUARY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).


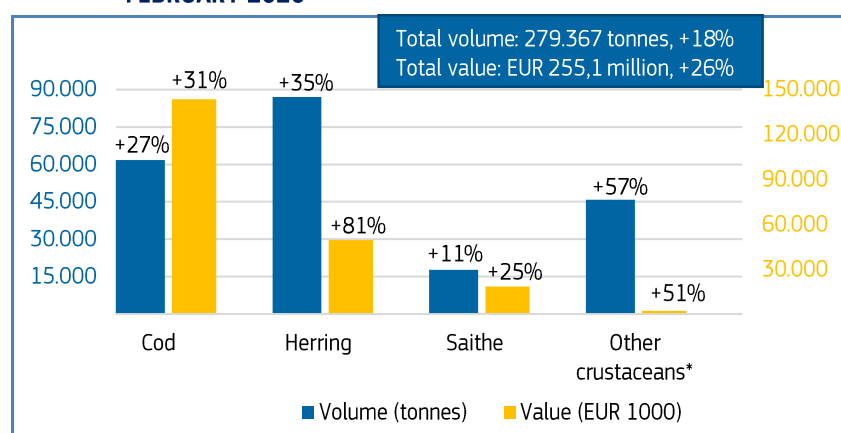
 In **Norway** in **January–February 2020**, first-sales value and volume increased by 17% and 2% respectively compared to January–February 2019. The main contributing species were cod, herring, mackerel, and other crustaceans*. In **February 2020**, first-sales value increased relative to the same period of the previous year due to cod, herring, and saithe. First-sales volume also increased due to the same species, as well as other crustaceans*. Of these species, herring exhibited the most significant increase in average price (+34%), reaching 0,57 EUR/kg.

Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NORWAY, FEBRUARY 2020**



Percentages show change from the previous year. Volume data is reported in live weight equivalent (LWE). Prices are reported in EUR/kg of live weight. *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>). Source: EUMOFA (updated 16.04.2020).




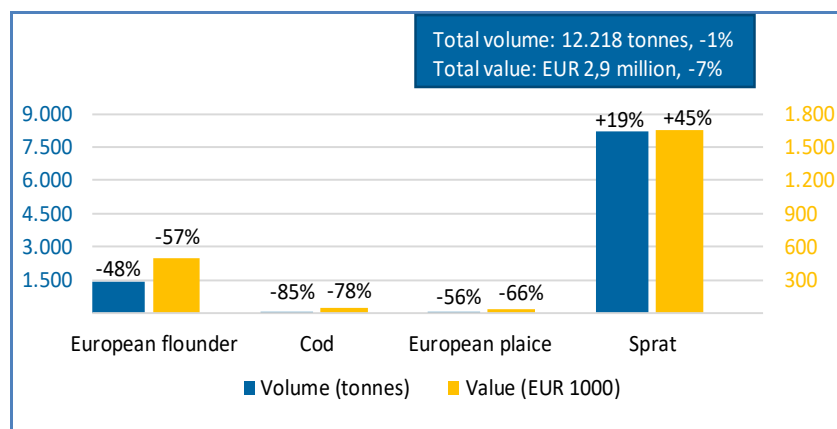
 In **Poland** in **January–February 2020**, first sales decreased by 17% in value and 12% in volume relative to the same period of 2019 due to reduced sales of European flounder. In **February 2020**, first-sales value and volume were slightly lower than in February 2019. This was due to a sharp decline in first sales of European flounder caused by frequent storms in February 2020, but also as a result of cod, which experienced fishery restrictions as of July 2019. Small by catch levels of cod triggered a 51% increase in its average price, causing it to reach 2,22 EUR/kg.

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, FEBRUARY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).


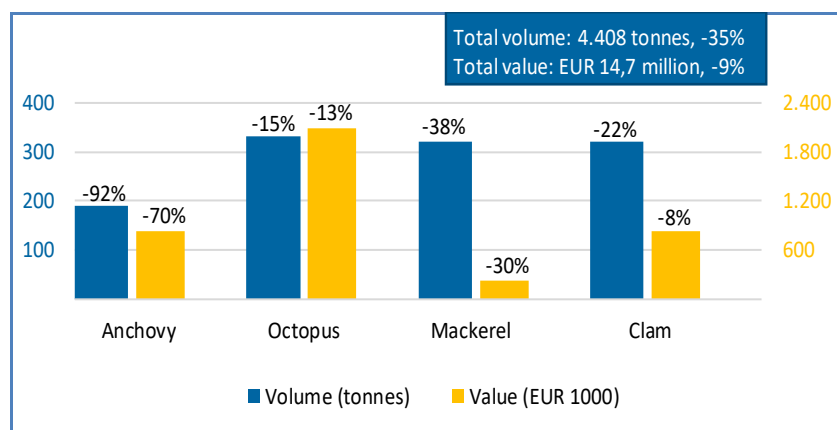
 In **Portugal** in **January–February 2020**, first sales decreased by 13% in value and 38% in volume compared to January–February 2019. These decreases were mostly linked to lower sales of anchovy. Anchovy was also behind the decreases in **February 2020** compared to February 2019, as first-sales value and volume continued decreasing trend. Such high decreases for anchovy were the result of decrease in total allowable catches and market driven reason, including lower quality and so lower price of anchovy in this period of year. Other commercial species that exhibited significant decreases include octopus, clam, and mackerel.

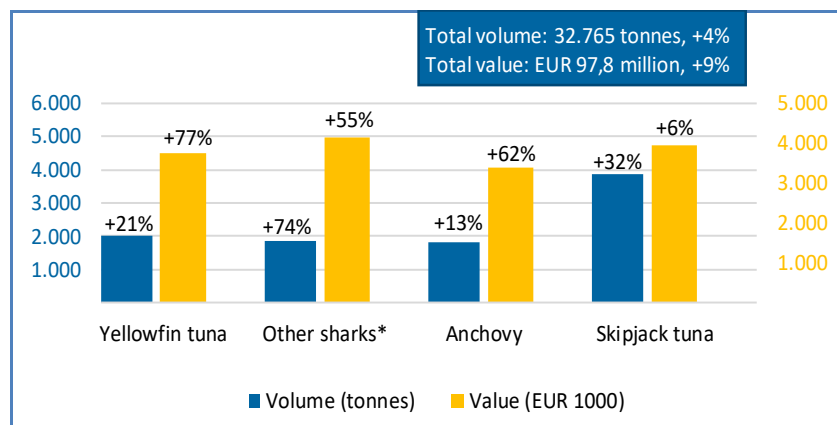
Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, FEBRUARY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).

 In **Spain** in **January–February 2020**, first sales showed an increase in value of 1% caused by anchovy. Volume decreased by 2%, mostly due to a low supply of hake relative to the same period in 2019. In **February 2020**, first sales increased in both value and volume in comparison to the same month in 2019. This was primarily due to higher sales of yellowfin tuna, other sharks*, anchovy, and skipjack tuna. Anchovy and yellowfin tuna recorded the highest average price increases (44% and 46% respectively).

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, FEBRUARY 2020**



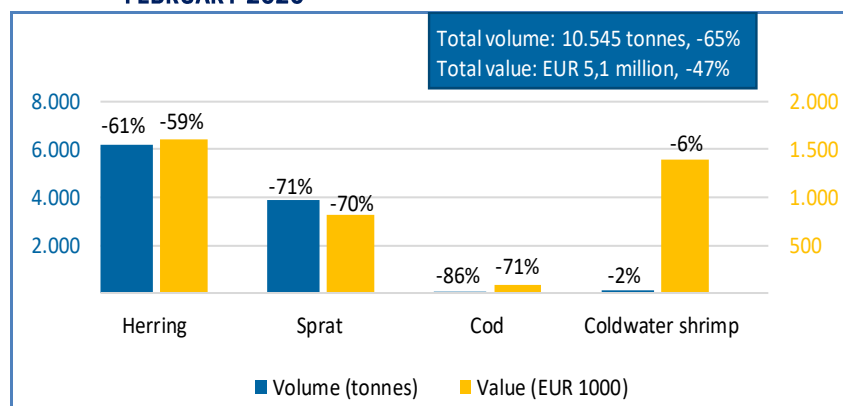
Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>). Source: EUMOFA (updated 16.04.2020).



In **Sweden** in
January–February

2020, first sales dropped in both value (-43%) and volume (-59%) compared to January–February 2019. In **February 2020** first-sales value and volume fell due to herring and sprat relative to February 2019. Such decreases could be due to reduced fishing opportunities for both species in 2020,³ in addition to bad weather conditions in February 2020. Other main commercial species with significant decreases include cod and coldwater shrimp.

Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, FEBRUARY 2020**



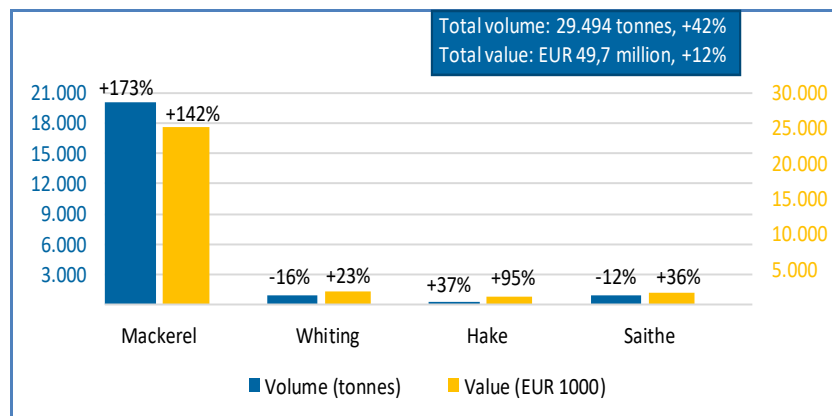
Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).



In **the UK** in
January–February

2020, first-sales value decreased by 7% due to Norway lobster, crab and scallop. Volume increased by 3% due primarily to mackerel. The changes for both value and volume are relative to the previous year. In **February 2020**, first-sales value and volume increased relative to February 2019. Significant increases in the supply of mackerel year-on-year caused the increases, although hake, whiting and saithe were also contributory species.

Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UK, FEBRUARY 2020**



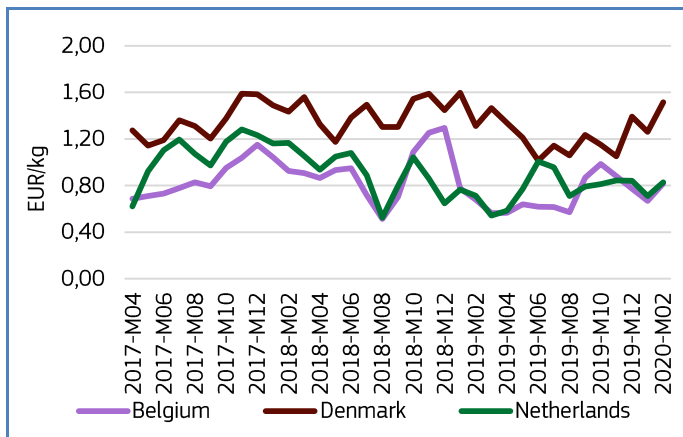
Percentages show change from the previous year. Source: EUMOFA (updated 16.04.2020).

³ Council Regulation (EU) 2020/123 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32020R0123&from=EN>



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

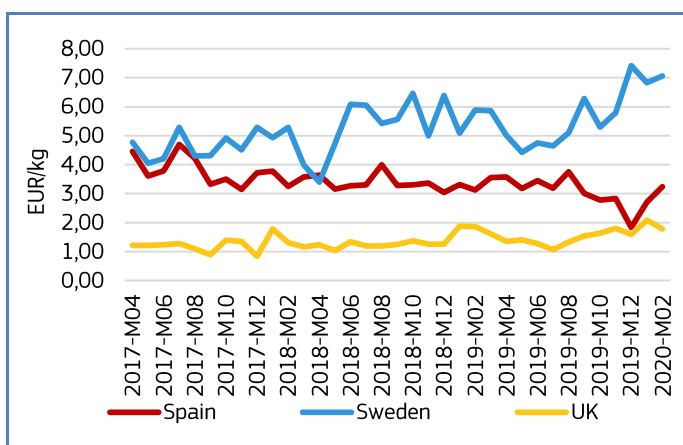
Figure 16. **FIRST-SALES PRICES OF DAB IN BELGIUM, DENMARK, AND THE NETHERLANDS**



Source: EUMOFA (updated 17.04.2020).

First sales of **dab** occur primarily in **Belgium**, **Denmark** and in **the Netherlands**. The average first-sales prices in February 2020 (the most recently available data) reached 0,82 EUR/kg in Belgium. This represented an increase of 23% from January 2020, and 20% from February 2019. In Denmark, first sales reached, 1,52 EUR/kg, an increase of 20% from the previous month, and 16% from the previous year. In the Netherlands, first sales rose to 0,83 EUR/kg, an increase of 16% from both January 2020 and February 2019. Fisheries are seasonal and experience different peaks across the countries analysed. Prices are highest in Denmark and converge in Belgium and the Netherlands. In the past 36 months, the prices of dab decreased in all three countries, most significantly in the Netherlands. During the same period, supply decreased in the Netherlands and increased in Belgium and Denmark.

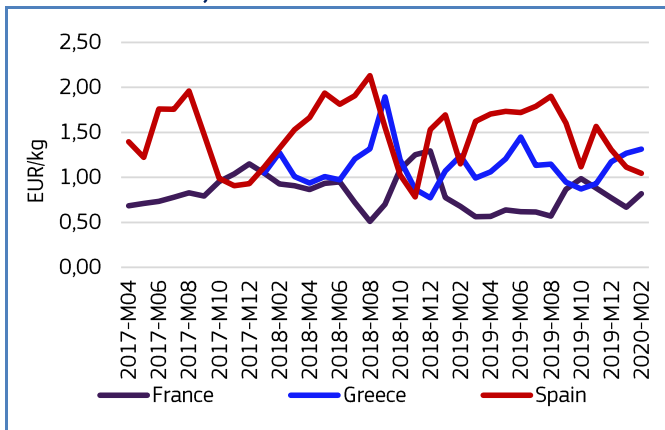
Figure 17. **FIRST-SALES PRICES OF FLOUNDERS (OTHER THAN EUROPEAN FLOUNDER) IN SPAIN, SWEDEN, AND THE UK**



Source: EUMOFA (updated 17.04.2020).

First sales of **flounders** (other than European flounder) take place in many European countries, including **Spain**, **Sweden**, and the **UK**. In February 2020, the average first-sales prices of flounder were: 3,24 EUR/kg in Spain (up by 20% from the previous month, and by 4% from the previous year); 7,06 EUR/kg in Sweden (up by 3% from the previous month and 20% from the previous year); and 1,78 EUR/kg in the UK (down by 15% from the previous month, and 4% than in the previous year). Overall, prices decreased in Spain and increased in Sweden and the UK. In Spain, average catch consists of a variety of species, whereas in Sweden and the UK the first sales are typically comprised of only one species. Price declines in Spain (December 2019) and Sweden (April 2018) correspond to sudden increases in supply. In the past 36 months, supply increased in Spain and decreased in Sweden and the UK.

Figure 18. **FIRST-SALES PRICES OF SARDINE IN FRANCE, GREECE, AND SPAIN**



Source: EUMOFA (updated 16.04.2020).

The majority of EU first sales of **sardine** occur in **Spain**, **France**, and **Greece** (data available from January 2018). In **February** 2020, the average first-sales prices of sardine were 0,82 EUR/kg in France (up by 23% from the previous month and 20% from the previous year); 1,32 EUR/kg in Greece (+4% higher than in January 2020, and up by 6% from February 2019); and 1,05 EUR/kg in Spain (6% down from the previous month and 9% down from the previous year). In Greece and Spain first-sales prices are clearly correlated with supply. 'Prices have increased in Spain yet decreased in Greece and, most notably, France. Supply increased in Greece, remained relatively stable in France, and decreased in Spain. Volumes sold in first-sales markets are seasonal, with peaks experienced in October–November in Greece and Spain, and July–August in France.

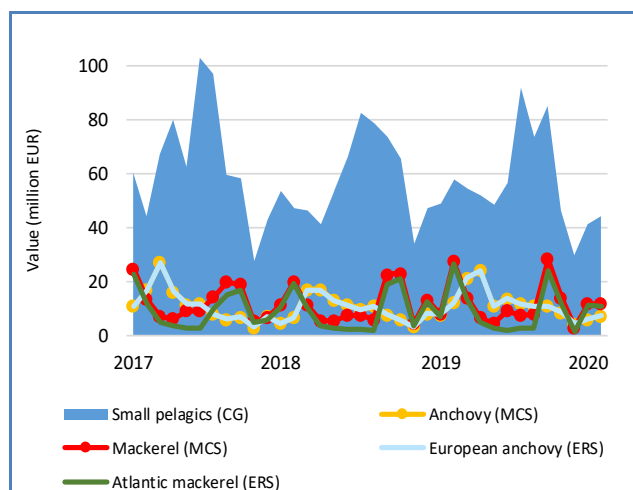
1.5. Commodity group of the month: small pelagics⁴

The “small pelagics” commodity group (CG⁵) ranked 1st in both value and volume among the 10 CGs sold at the first-sales stage in February 2020⁶. First sales of small pelagics reached EUR 44,3 million and 64.984 tonnes, representing decreases of 10% and 28% respectively when compared to February 2019. In the past 36 months the highest first-sales value of small pelagics was registered at EUR 103,0 million (August 2017).

The small pelagics commodity group includes seven main commercial species (MCS): anchovy, herring, horse mackerel, mackerel, sardine, sprat, and miscellaneous small pelagics.

At Electronic recording and reporting system (ERS) level, European anchovy (25%) and Atlantic mackerel (16%) together accounted for 41% of the total reported first-sales value of this commodity group in February 2020.

Figure 19. **FIRST-SALES VALUE COMPARISON AT CG LEVEL, MCS LEVEL AND ERS LEVEL FOR REPORTING COUNTRIES* (MARCH 2018 – FEBRUARY 2020)**



*Norway and the UK are excluded from the analyses.
Source: EUMOFA (updated 16.04.2020).

1.6. Focus on European anchovy



European anchovy (*Engraulis encrasicolus*) is a forage fish that belongs to the small pelagic group. It is a migratory species that can be found in the Eastern Atlantic; from the south of Norway to the coast of Angola in West Africa; and in the Mediterranean, Black and Azov seas⁷. It tends to move northwards on surface water layers in summer, then subsequently retreat and descend in winter. It feeds on

planktonic organisms. Spawning occurs from April to November with peaks usually seen in the warmest months. The limits of the spawning seasons are defined by temperature. Anchovy can reach a maximum length of 20 cm, although they most commonly reach lengths of 12–15 cm. In the EU, anchovy fisheries are mainly concentrated in the Bay of Biscay (France and Spain), off the coast of Portugal and in the Adriatic Sea (mainly Croatia and Italy)⁸. In the EU, most anchovy are caught by pelagic trawlers. The main fleets are located in north-west Spain and south-west France where the fishing season runs from 1st July to 30th June the following year⁹. Anchovy is subject to fishery-management measures, including fishery closures and total allowable catches (TACs) in the ICES Subarea 8 (Bay of Biscay) which are provisionally determined by the Council of EU Ministers in December each year. TACs have been set at 31.892 tonnes for 2020 in the Bay of Biscay (zone VIII) and are shared between France (3.189 tonnes) and Spain (28.703 tonnes). In zones 9 and 10, the precautionary TAC for Spain and Portugal is set at zero. The quota may only be fished from 1st July 2020 to 30th June 2021, as the TAC and the Member States quotas will be amended following renewed scientific advice due to be issued in June 2020¹⁰. In the Adriatic Sea anchovy is managed through various temporal–spatial and fishing effort measures such as maximum number of fishing days, catch limits per vessel, and fishery closures. The minimum landing size for anchovy is 12 cm (Atlantic Ocean) and 9 cm (Mediterranean Sea including the Adriatic)¹¹.

⁴ EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

⁵ Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

⁶ More data on commodity groups can be found in Table 1.2 of the Annex

⁷ <http://www.fao.org/fishery/species/2106/en>

⁸ <https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2019/2019/ane.27.8.pdf>

⁹ https://ec.europa.eu/fisheries/marine_species/wild_species/anchovy_en

¹⁰ Council Regulation (EU) 2020/123 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32020R0123&from=EN>

¹¹ Council Regulation (EC) No 1967/2006 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32006R1967&from=EN>



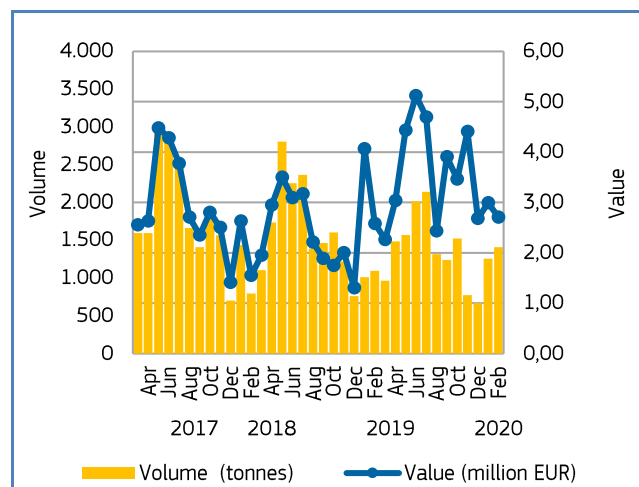
Selected countries

In **Italy** in January–February 2020, first sales of European anchovy decreased by 14% in value and increased by 26% in volume relative to January–February 2019. Compared to 2018, first sales were higher by 36% in value and 19% in volume. The highest level of supply was from May to July, coinciding with an increase in sea temperatures. Anchovy in the Adriatic is caught with mid-water pair trawls (Italian *volante*) and purse seines (Italian *lampara*).

Of small pelagics sold at the first-sales stage in February 2020, European anchovy accounted for 79% of total value and 67% of total volume.

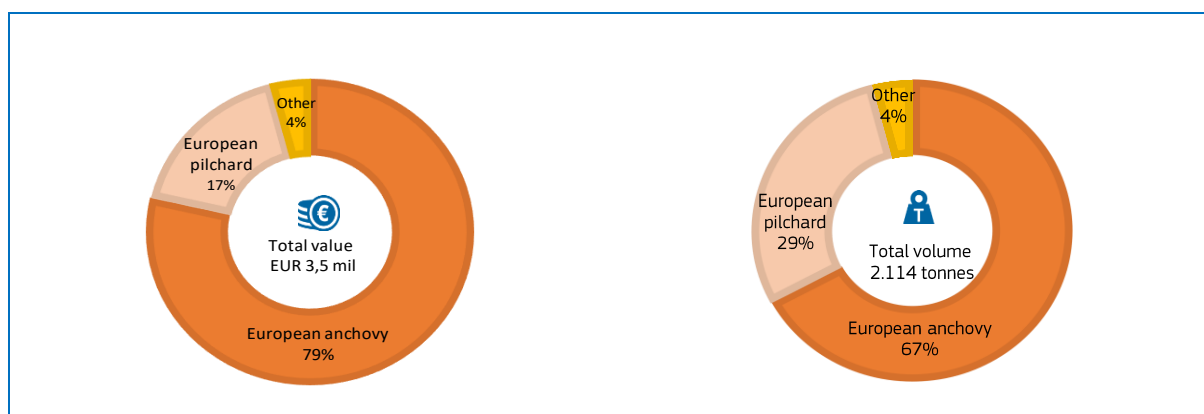
Porto Tolle, San Benedetto del Tronto, and Chioggia in the Mediterranean Sea were the ports with the highest reported levels of anchovy first sales in January–February 2020.

Figure 20. **EUROPEAN ANCHOVY: FIRST SALES IN ITALY**



Source: EUMOFA (updated 16.04.2020).

Figure 21. **FIRST SALES: COMPARISON OF SMALL PELAGICS (ERS) IN ITALY, VALUE AND VOLUME, FEBRUARY 2020**



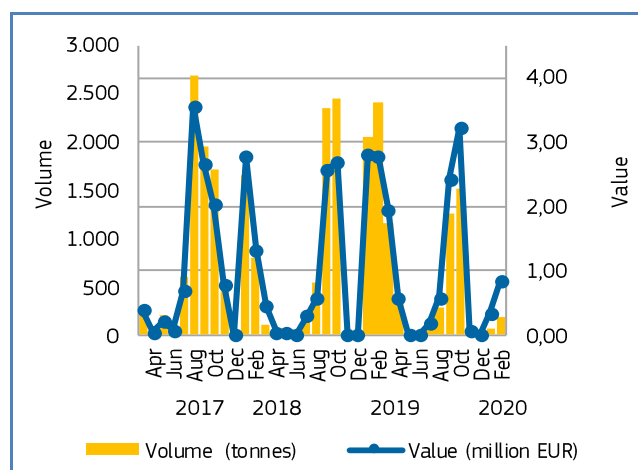
Source: EUMOFA (updated 16.04.2020).

In **Portugal** in January–February 2020, first sales of European anchovy decreased by 79% in value and 94% in volume from the same period in 2019. Compared with January–February 2018, value and volume decreased by 71% and 90%, respectively.

Of small pelagics sold in February 2020, European anchovy accounted for 35% of total first-sales value and 11% of total first-sales volume.

The port of Matosinhos on Portugal's Atlantic coast was responsible for 98% of total first-sales value in January–February 2020.

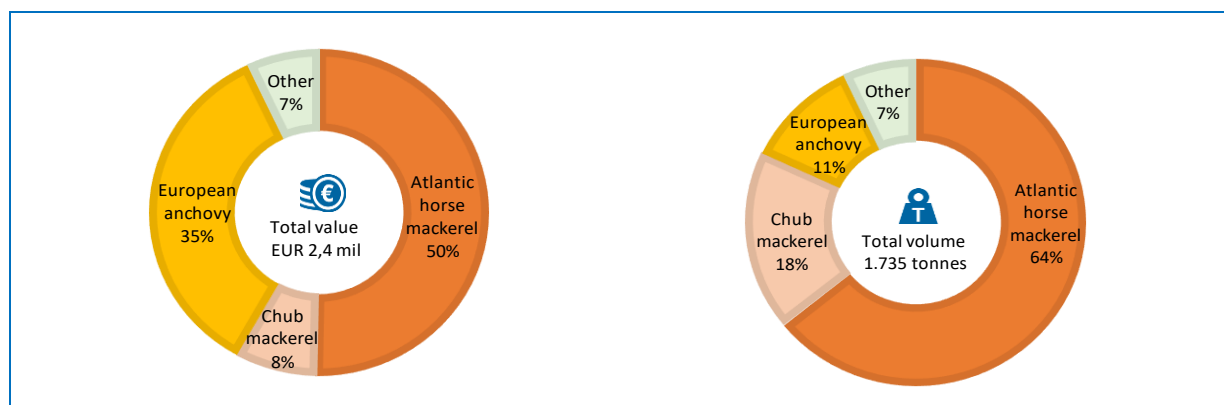
Figure 22. **EUROPEAN ANCHOVY: FIRST SALES IN PORTUGAL**



Source: EUMOFA (updated 16.04.2020).



Figure 23. **FIRST SALES: COMPARISON OF SMALL PELAGICS (ERS) IN PORTUGAL, VALUE AND VOLUME, FEBRUARY 2020**



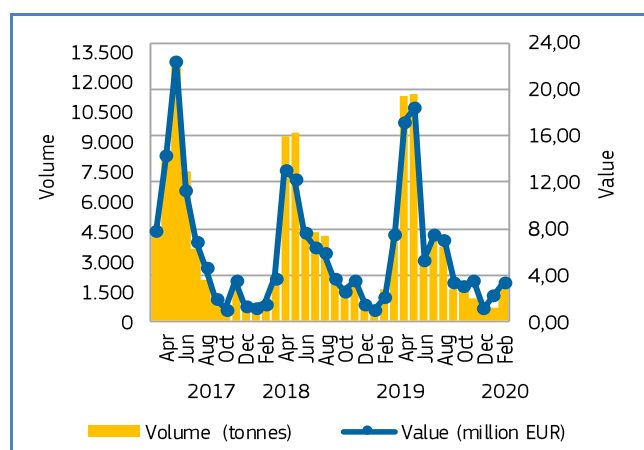
Source: EUMOFA (updated 16.04.2020).

In **Spain** in January–February 2020, first sales of European anchovy increased by 79% in value and 19% in volume compared to January–February 2019. Relative to 2018, first-sales value more than doubled (+104%), while volume increased by about a half (+54%). Typically, anchovy supply is highest in April–May, at the peak of the fishing season, while supply falls from December to January.

Of small pelagics sold at first sales stage in February 2020, European anchovy accounted for 38% in value and 26% in volume.

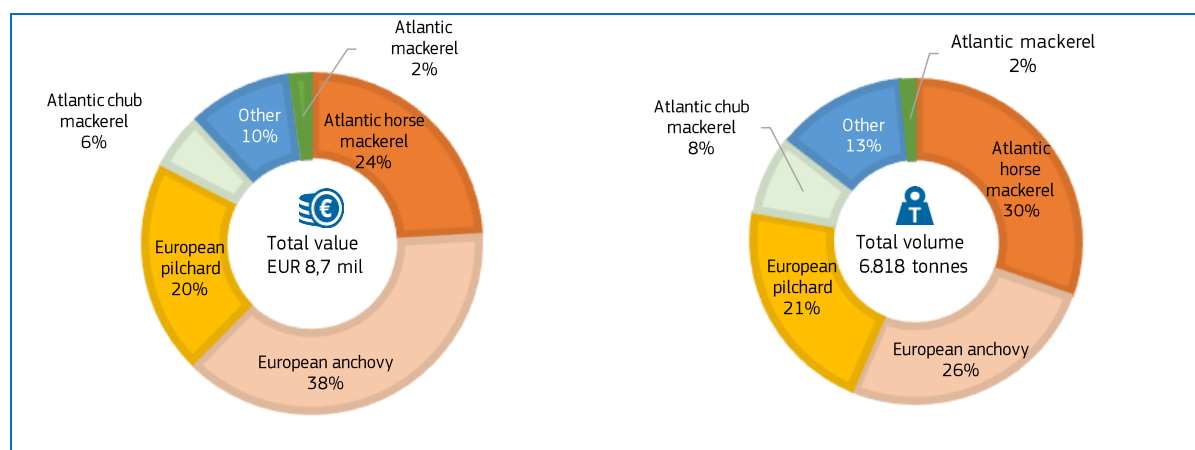
Isla Cristina (in the Bay of Biscay), and in Jávea, Almería and Altea, (in the Mediterranean Sea), were the ports with the highest first-sales values in January–February 2020.

Figure 24. **EUROPEAN ANCHOVY: FIRST SALES IN SPAIN**



Source: EUMOFA (updated 16.04.2020).

Figure 25. **FIRST SALES: COMPARISON OF SMALL PELAGICS (ERS) IN SPAIN, VALUE AND VOLUME, FEBRUARY 2020**

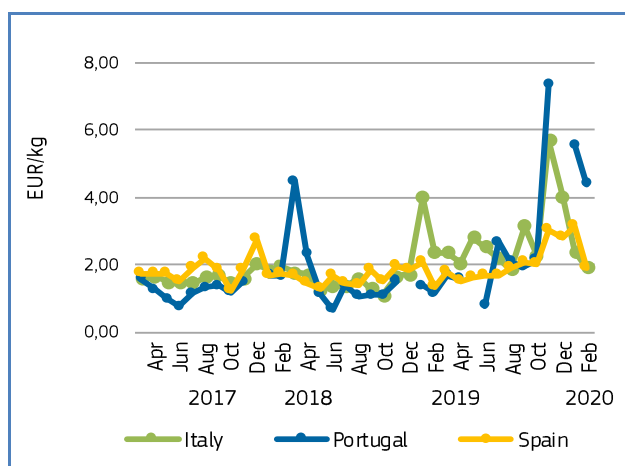


Source: EUMOFA (updated 16.04.2020).



Price trend

Figure 26. **EUROPEAN ANCHOVY: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 16.04.2020).

Over the 36-month observation period (March 2018–February 2020), the average first-sales price of European anchovy in Italy was 2,06 EUR/kg. This was 12% higher than the average price in Spain (1,84 EUR/kg), and 8% higher than that of Portugal (1,89 EUR/kg).

In **Italy** in February 2020, the average first-sales price of European anchovy (1,92 EUR/kg) decreased by 18% compared to February 2019, and by 2% relative to February 2018. During the past 36 months, the lowest price was recorded in October 2018 at 1,09 EUR/kg for 1.601 tonnes. The highest price (5,72 EUR/kg for 771 tonnes) was recorded in November 2019.

In **Portugal**, the average price of European anchovy was 4,39 EUR/kg in February 2020, 280% more than in February 2019, and 163% more than in February 2018. Such a high price difference was due to a significantly lower volume of anchovy caught in February 2020 (191 tonnes) relative to 2019 (2.411 tonnes) and 2018 (796 tonnes). In the observed period the lowest price was recorded in June 2018 at 0,65 EUR/kg for 24 tonnes. Prices peaked in November 2019, when 10 tonnes were sold at 7,38 EUR/kg. There were no recorded sales in December.

In **Spain** in February 2020, the average first-sales price of European anchovy (1,88 EUR/kg) increased by 44% compared to February 2019 and by 10% relative to February 2018. The lowest price in the observed period was recorded in October 2017 at 1,22 EUR/kg for 891 tonnes. The highest price (3,17 EUR/kg for 720 tonnes) was observed in January 2020.

1.7. Focus on Atlantic mackerel



Atlantic mackerel (*Scomber scombrus*), is a species of mackerel (family Scombridae), found in the temperate waters of the Mediterranean Sea, the Black Sea, and the northern Atlantic Ocean. It can live up to 20 years and is able to

reach sexual maturity at 2-3 years, once it reaches a size of approximately 37cm. Spawning occurs in the spring and summer months. There are three stocks in the eastern Atlantic: one in the south, one in the west, and another in the North Sea¹². There are two stocks in the Mediterranean, one in the east and one in the west. Atlantic mackerel is a migratory fish which forms large schools and spends the spring and summer months close to shore. During the colder months it moves to warmer waters further offshore.

¹² <https://www.iucnredlist.org/species/170354/6764313#conservation-actions>



Atlantic mackerel is a species of high commercial importance caught by purse seiners, otter trawls, hand lines, and gill and trammel nets in artisanal fisheries¹³. Important fisheries for Atlantic mackerel are located in the Northwest Atlantic (Fishing Area 21), Northeast Atlantic (Area 27), and Mediterranean and Black seas (Area 37)¹⁴. In the EU, management measures for the Northeast Atlantic stock include minimum conservation reference sizes (30 cm in the North Sea, 20 cm in south and north western waters, and 18 cm in the Mediterranean Sea)¹⁵; a landing obligation; Total Allowable Catches (TAC)¹⁶; restricted areas; fishery closures, and technical measures (such as minimum mesh sizes). TAC for mackerel in the Atlantic, the North Sea and international fisheries in which EU vessels participate, is established annually in December based on ICES advice and agreement among the Council of EU Ministers¹⁷ and involved third parties. For example, this may include Norway and the Faroe Islands¹⁸, or by virtue of agreements reached in the framework of Regional Fisheries Management Organisations (RFMOs).

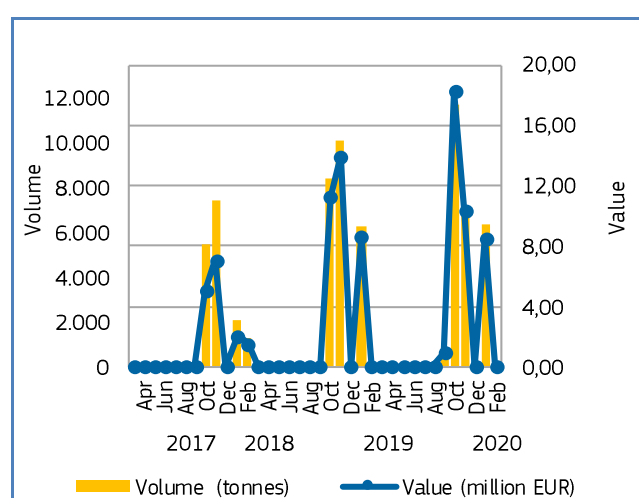
Selected countries

In **Denmark** in January–February 2020, first sales of Atlantic mackerel remained stable in value and volume compared to the same period in 2019. Relative to 2018, first sales increased 134% in value and 89% in volume. The major part of the western component of Northeast Atlantic mackerel is taken in ICES division 4.a from October until mid-February. Catch limits dictate that certain quantities may only be taken from the fishing area during the periods 1st January to 15th February and 1st October to 31st December¹⁹.

Of small pelagics sold at first-sales stage in February 2020, Atlantic herring accounted for 99% of total first-sales value and volume. Sales of Atlantic mackerel and other small pelagic species were minimal.

The port of Hirtshals in the North Sea accounted for nearly all (99,97%) reported first sales of Atlantic mackerel in January–February 2020.

Figure 27. **ATLANTIC MACKEREL: FIRST SALES IN DENMARK**



Source: EUMOFA (updated 16.04.2020).

¹³ http://ices.dk/sites/pub/Publication%20Reports/Advice/2019/2019/FisheriesOverviews_BoBlberian_2019.pdf

¹⁴ <http://www.fao.org/fishery/species/2473/en>

¹⁵ Regulation (EU) 2019/1241 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32019R1241>

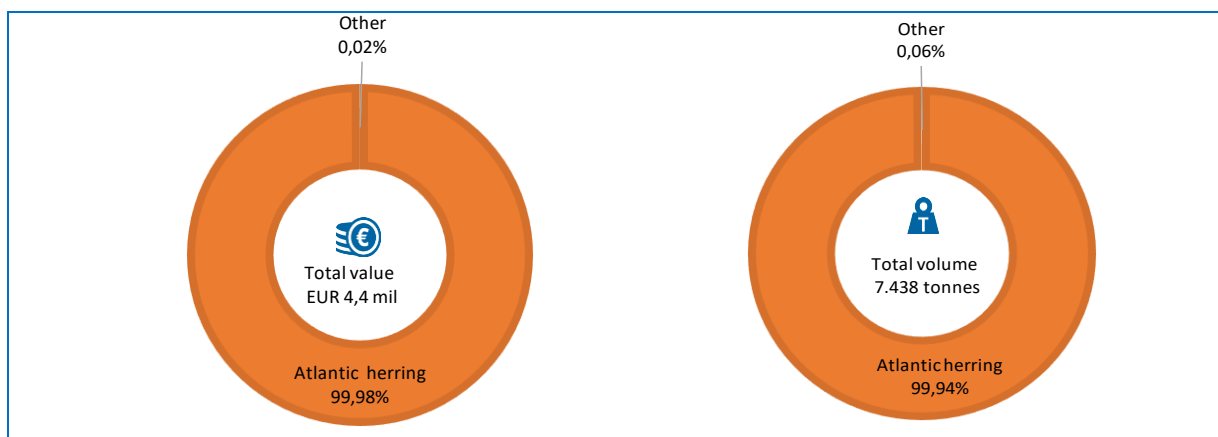
¹⁶ https://www.consilium.europa.eu/media/41951/table-for-press-release_updated.pdf

¹⁷ Council Regulation (EU) 2020/123 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32020R0123&from=EN>

¹⁸ <https://www.fisk.fo/media/13129/agreed-record-of-conclusions-of-fisheries-consultations-between-the-european-union-the-faroe-islands-and-norway-on-the-management-of-mackerel-in-the-northeast-atlantic-for-2020.pdf>

¹⁹ ICES WGWI REPORT 2017, pp.391

Figure 28. **FIRST SALES: COMPARISON OF SMALL PELAGICS (ERS) IN DENMARK, VALUE AND VOLUME, FEBRUARY 2020**



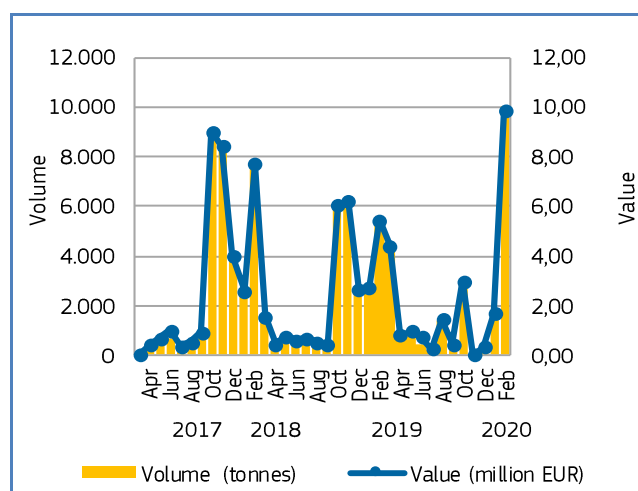
Source: EUMOFA (updated 16.04.2020).

In **the Netherlands** in January–February 2020, first sales of Atlantic mackerel increased by 42% in value and 44% in volume relative to the same period in 2019. Compared with 2018, value and volume went up by 12% and 14% respectively.

Of small pelagics sold in February 2020, Atlantic mackerel accounted for 58% of total first-sales value and 59% of volume.

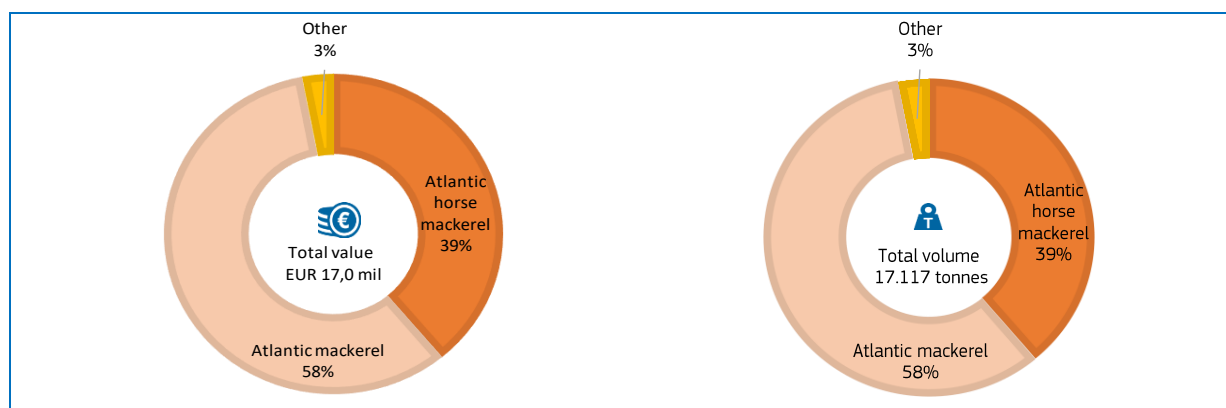
The ports of IJmuiden/Velsen and Scheveningen in the North Sea were responsible for 92% of total first-sales value in January–February 2020.

Figure 29. **ATLANTIC MACKEREL: FIRST SALES IN THE NETHERLANDS**



Source: EUMOFA (updated 16.04.2020).

Figure 30. **FIRST SALES: COMPARISON OF SMALL PELAGICS (ERS) IN THE NETHERLANDS, VALUE AND VOLUME, FEBRUARY 2020**



Source: EUMOFA (updated 16.04.2020).

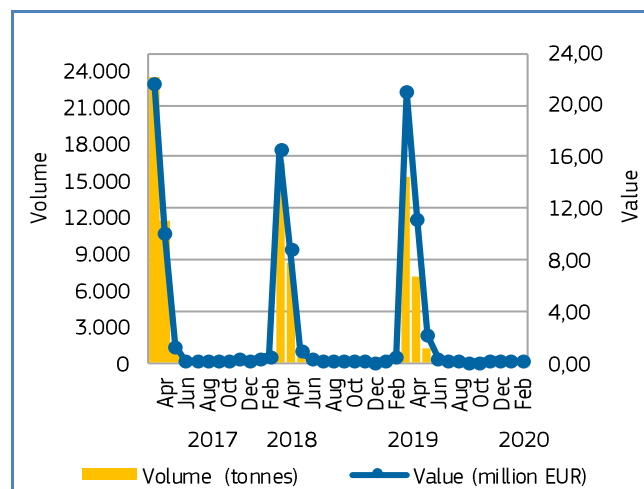


In **Spain** in January–February 2020, first sales of Atlantic mackerel decreased by 58% in value and 46% in volume, relative to January–February 2019. Compared with 2018, first sales were 63% lower in value, and 64% lower in volume. The mackerel fishery starts at the beginning of March and the peak season lasts until May, when mackerel stocks congregate its spawning grounds.

Of small pelagics sold at first-sales stage in February 2020, Atlantic mackerel accounted for 2% in both value and volume (see fig. 25).

The ports of Pasajes, Ondárroa and Santa Eugenia Ribeira, in the Bay of Biscay, accounted for 57% of first-sales value in January–February 2020.

Figure 31. **ATLANTIC MACKEREL: FIRST SALES IN SPAIN**



Source: EUMOFA (updated 16.04.2020).

Price trends

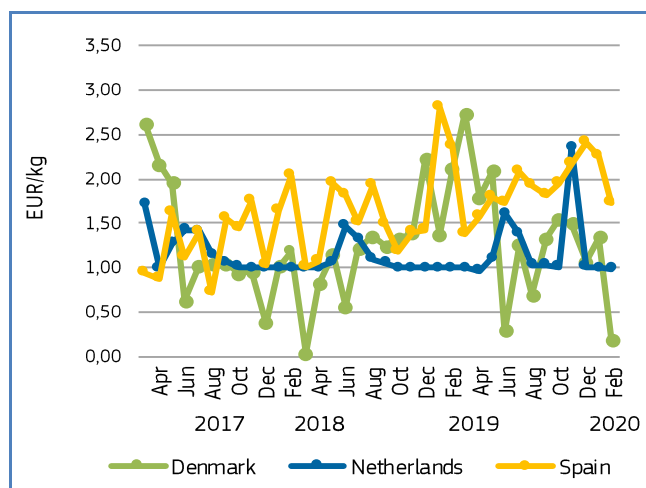
Over the 36-month period from March 2017 to February 2020, the highest average price of Atlantic mackerel among the selected countries was recorded in Spain at 1,63 EUR/kg. This was 42% higher than in the Netherlands (1,15 EUR/kg), and 29% greater than in Denmark (1,26 EUR/kg).

In **Denmark** in February 2020, the average price of Atlantic mackerel (0,18 EUR/kg) represented a significant decrease from both the previous year (-91% from 2,10 EUR/kg) and the same period in 2018 (-85% from 1,18 EUR/kg). The lowest price of the 36-month period observed in March 2018 (0,03 EUR/kg for 15 tonnes), while the highest was recorded in March 2019 (2,73 EUR/kg for approximately 156 kg). Typically, the highest price are recorded in spring (March-May), when supply is limited.

In the **Netherlands** in February 2020, the average price of Atlantic mackerel was 0,99 EUR/kg, representing a decrease of 2% from February 2019, and 1% from February 2018. The lowest price was recorded in April 2019 at 0,96 EUR/kg for 848 tonnes. The highest price was observed in November 2019 at 2,35 EUR/kg for 6 tonnes.

In **Spain**, the average price of Atlantic mackerel in February 2020 was 1,73 EUR/kg, 27% lower than in February 2019, and 16% lower than in February 2018. Over the past 36 months, first-sales price was the lowest in August 2017 when 208 tonnes of Atlantic mackerel were sold for 0,71 EUR/kg. The highest price was observed in January 2019 at 2,81 EUR/kg, when the total supply amounted to 102 tonnes.

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



Source: EUMOFA (updated 16.04.2020).

We have covered **Atlantic mackerel** in previous *Monthly Highlights*:

First sales: France, Portugal, Sweden (1/2018).

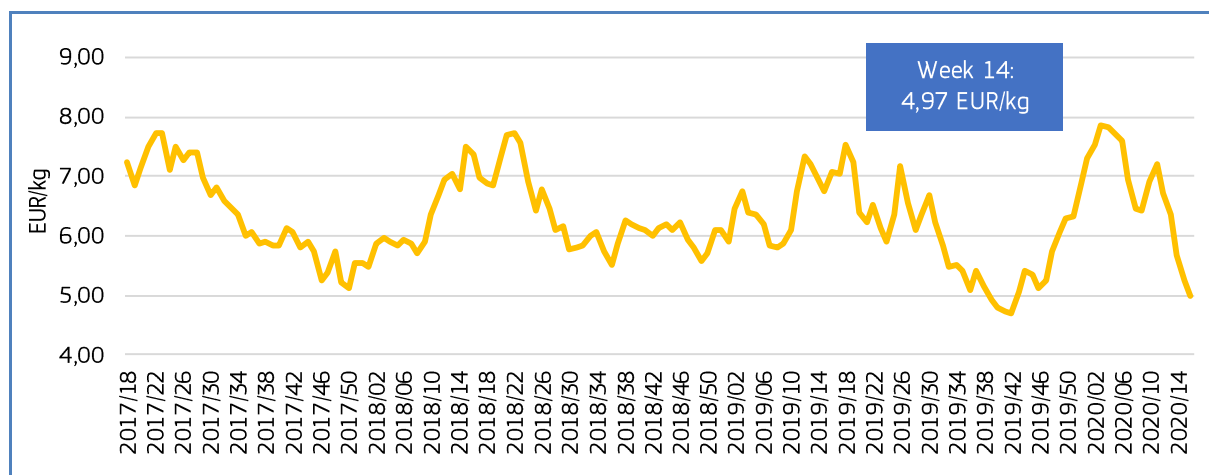
Topic of the month: Atlantic mackerel in the EU (7/2018).

2. Extra-EU imports

Each month, the weekly extra-EU import prices (average values per week, in EUR per kg) are examined for nine species. The three species that are the most relevant in terms of value and volume are examined: fresh whole Atlantic salmon from Norway, frozen Alaskan pollock fillets from China, and frozen tropical shrimp (genus *Penaeus*) from Ecuador. The other six species change every month: three are from the commodity group of the month (in this issue, small pelagics). This month, the featured commodity species are frozen fillets of mackerel from Iceland, prepared or preserved fillets of mackerel from Morocco, and frozen sardines from Morocco. The remaining three species are randomly selected and, this month, include caviar substitutes from the United States, frozen bigeye tunas from El Salvador, and frozen scallops, including queen scallops from the United States.

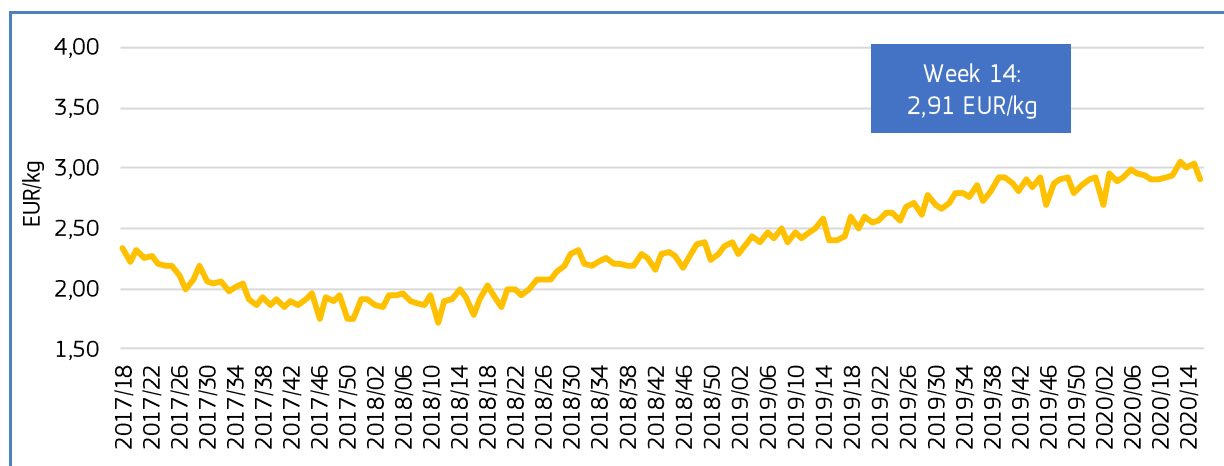
The weekly price of **fresh, whole Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway** reached 4,97 EUR/kg in **week 14** (commencing 30th March). This price decreased from both the preceding four-week average (6,01 EUR/kg), and the previous year (7,08 EUR/kg), by 17% and 30% respectively. The price of fresh, whole Atlantic salmon was 5% lower than the previous week (week 13), corresponding to a 11% increase in volume. Imports in week 14 totalled 11.121 tonnes, 2% up from the average over the previous four weeks, and down by 14% from the previous year. Over the past three years, price has exhibited a downward trend, while volume has increased. Price dropped dramatically (–26%) since week 10 (commencing 2nd March) while imported volume went up by 6%.

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



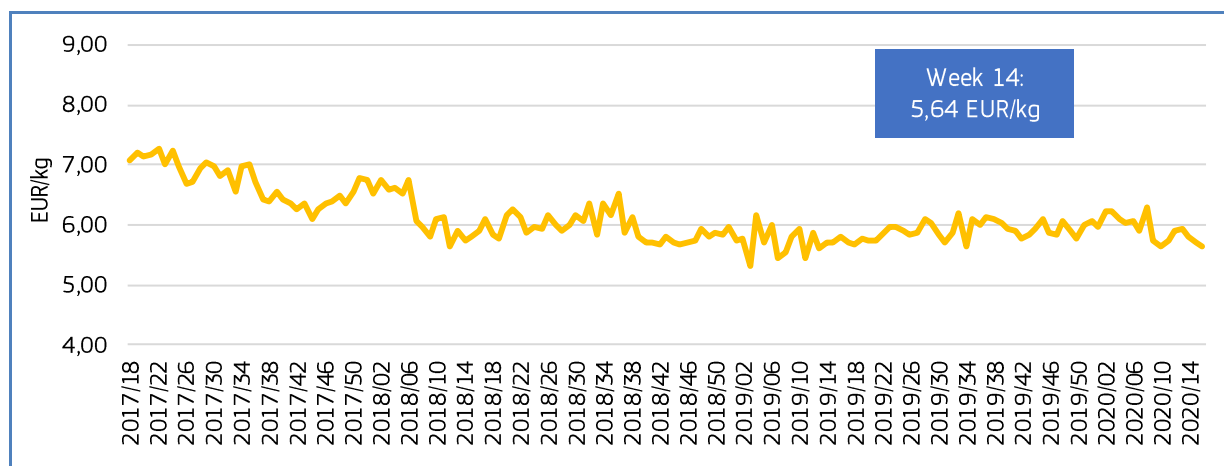
Source: European Commission (updated 16.04.2020).

For **frozen fillets of Alaska pollock** (*Theragra chalcogramma*, CN code 03047500) imported from **China**, the price in **week 14** was 2,91 EUR/kg, 3% lower than the preceding four-week average (3,01 EUR/kg), and 21% higher than the same week in 2019 (2,40 EUR/kg). The price of frozen fillets of Alaska pollock was 4% lower than the previous week (week 13), corresponding to a substantial drop in volume (–59%), which can be attributed to a decrease of imports from China due to the COVID-19 pandemic. Volume totalled 2.046 tonnes, a 44% decrease from the average of the previous four weeks, and a 48% increase relative to the same week in 2019. Since the beginning of 2020, the price of Alaska pollock has fluctuated considerably and shown an upward trend, while volume has decreased.

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

Source: European Commission (updated 16.04.2020).

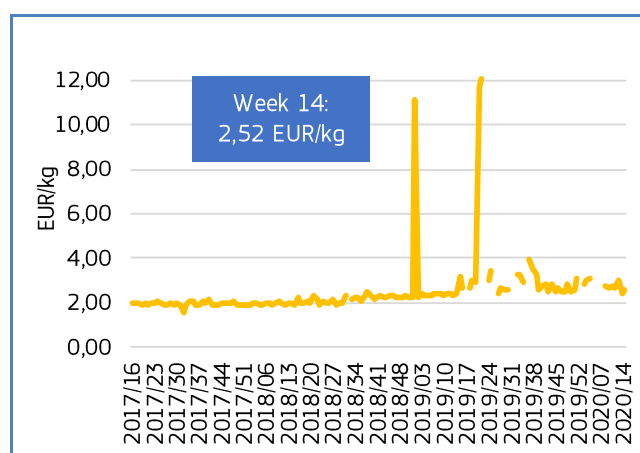
The price of **frozen tropical shrimp** (genus *Penaeus*, CN code 03061792) from **Ecuador** was 5,64 EUR/kg in **week 14**: 3% lower than the average over the preceding four weeks (5,83 EUR/kg), and down 2% from the same week in 2019 (5,79 EUR/kg). The price for frozen tropical shrimp was 1% down from the previous week (week 13), corresponding to a 19% increase in volume. The volume in week 14 (2,825 tonnes) represented an increase from both the previous four-week average and the same week in 2019 (+11% and +61% respectively). This product experienced high fluctuations in supply. Over the past three years, price has exhibited a downward trend, while volume has increased.

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

Source: European Commission (updated 16.04.2020).

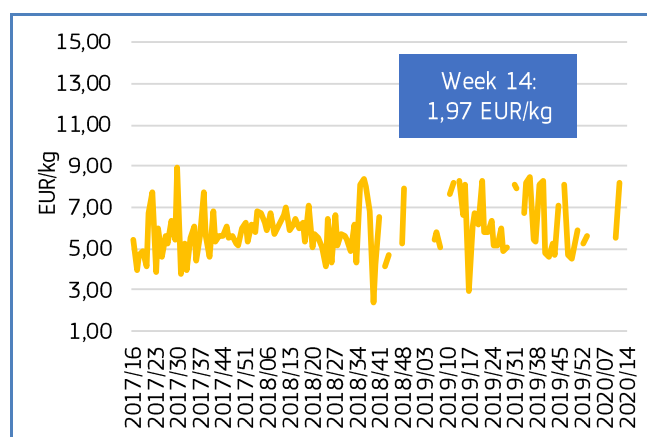
The price of **frozen mackerel fillets** (*Scomber scombrus*, *Scomber japonicus*, *Orcynopsis unicolor*, CN code 03048949) imported from **Iceland**, was 2,52 EUR/kg in **week 14**. This represented a 7% decrease from the preceding four-week average (2,70 EUR/kg), and a 20% decrease from the same week in 2019 (3,16 EUR/kg). The volume recorded in week 14 (167 tonnes) was 56% up from the preceding four-week average (107 tonnes), and over 5 times higher than the same week in 2019 (27 tonnes). Prices increased over the observed period, oscillating between 1,57 and 3,93 EUR/kg, while volume decreased. The spikes in price (11,13 EUR/kg in week 52 of 2018, and 12,07 EUR/kg in week 21 of 2019) corresponds to drops in supply (48 kg and 154 kg respectively). Poland is the biggest importer of frozen mackerel fillets.

Figure 36. **IMPORT PRICE OF FROZEN MACKEREL FILLETS FROM ICELAND**



Source: European Commission (updated 16.04.2020).

Figure 37. **IMPORT PRICE OF PREPARED OR PRESERVED MACKEREL FILLETS FROM MOROCCO**



Source: European Commission (updated 16.04.2020).

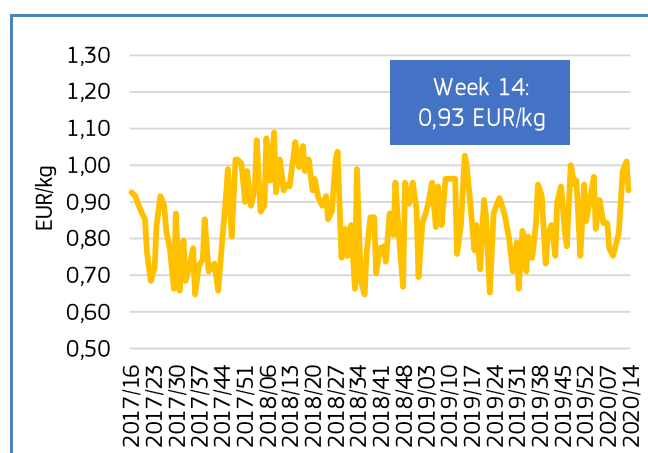
The price of **prepared or preserved mackerel fillets** (CN code 16041511) from **Morocco** was 1,97 EUR/kg in **week 14**. This was significantly lower than both the preceding two-week average²⁰ and the same week in 2019 (–71%, and –76% respectively). This price of prepared or preserved mackerel fillets showed significant fluctuations from a low of 1,97 EUR/kg in week 14 of 2020, to a high of 8,93 EUR/kg in week 30 of 2017. The volume recorded in week 14 (1,1 tonnes) was six times higher than the preceding two-week average (0,2 tonnes) and 42% up from the same week in 2019 (0,8 tonnes). The imported volume showed a high week-on-week volatility. Over the past three years, price has increased moderately while volume showed a sharp downward trend. Italy and Spain are the biggest importers of prepared or preserved mackerel fillets.

²⁰ Prices for weeks 11 and 12 of 2020.



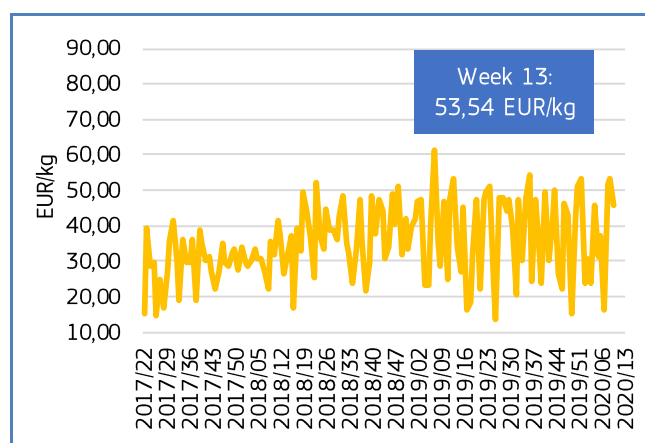
For **frozen sardines** (*Sardina pilchardus*, CN code 03035310) from **Morocco**, the price in **week 14** was 0,93 EUR/kg. This represents a 3% increase from the preceding four-week average (0,90 EUR/kg), and an 11% increase relative to the same week of the previous year (0,84 EUR/kg). Prices varied from 0,65 EUR/kg (week 36 of 2017) to 1,09 EUR/kg (week 8 of 2018) exhibiting an overall increase during the past three years. Volume decreased over the same period. The volume of 83 tonnes in week 14 was 62% lower than both the preceding four-week average (221 tonnes), and the previous year (217 tonnes). Prices do not seem to correlate directly with supply, which is highly variable (ranging from 27 tonnes to 1.868 tonnes). Spain is the EU's biggest importer, although Malta and Portugal are also significant players.

Figure 38. **IMPORT PRICE OF FROZEN SARDINES FROM MOROCCO**



Source: European Commission (updated 16.04.2020).

Figure 39. **IMPORT PRICE OF CAVIAR SUBSTITUTES FROM THE UNITED STATES**



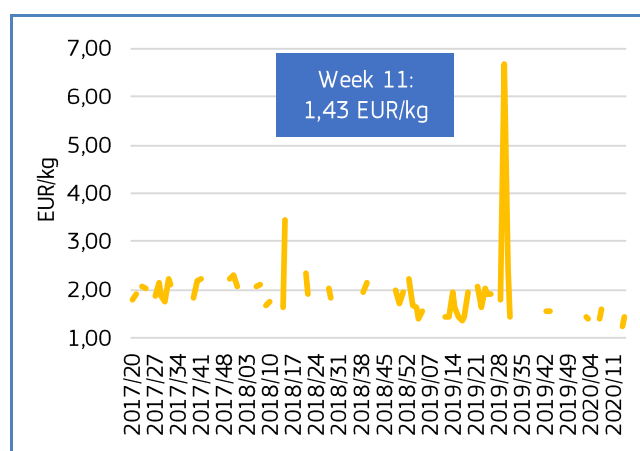
Source: European Commission (updated 16.04.2020).

The price of **caviar substitutes** (CN code 16043200) from **the United States** was 53,54 EUR/kg in **week 13** (the most recent available data). This was 8% higher than the preceding two-week average²¹ of 49,47 EUR/kg and remained unchanged from the same week in 2019 of 53,46 EUR/kg. The recorded volume of 0,06 tonnes in week 13 was significantly lower than both the preceding two weeks (3,9 tonnes, -98%), and the previous year (0,9 tonnes, -94%). Volume fluctuated from week to week, while prices oscillated between 13,35 EUR/kg (week 26 of 2019) and 61,43 EUR/kg. Supply varied from 0,05 tonnes (week 28 of 2018 and week 44 of 2019) to 95 tonnes (week 45 of 2017) and does not seem demonstrate any correlation with price. Price exhibited an increasing trend over the past three years, while volume showed an opposite trend. Germany is the EU's top importer of caviar substitutes.

²¹ Prices for weeks 9 and 10 of 2020.

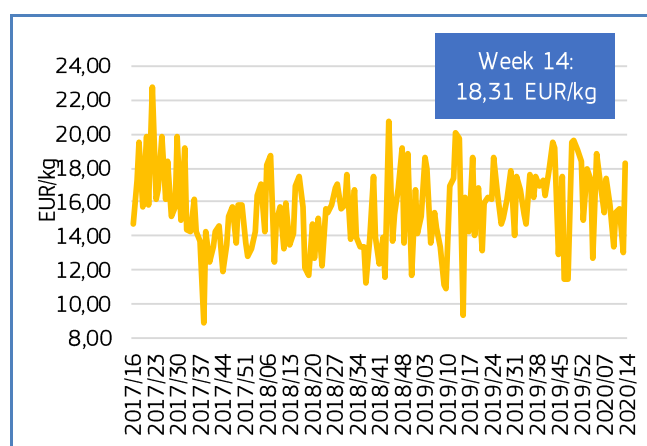
The price of **frozen bigeye tuna, other** (*Thunnus obesus*, CN code 03034490) from **El Salvador** reached 1,43 EUR/kg in **week 11** (the most recently available data). This was higher than the preceding two-week average²² (1,32 EUR/kg, +9%), and down 11% from the previous year (1,62 EUR/kg.). The recorded volume of 250 tonnes in week 11 was significantly higher than both the preceding two weeks (63 tonnes, +299%) and a year earlier (31 tonnes, +703%). Supply is sporadic, and volume fluctuates from week to week. Price does not seem to correlate directly with supply, which varies from 0,4 tonnes to 431 tonnes. Spikes in price (3,59 EUR/kg, week 22 of 2018 and 6,68 EUR/kg, week 26 of 2019) do not correlate with any decrease in supply. Price exhibited a slight increasing trend over the past three years, while volume showed the overall decline. EU imports of this product are used for processing, and Spain is the single importer.

Figure 40. **IMPORT PRICE OF FROZEN OTHER BIGEYE TUNAS FROM EL SALVADOR**



Source: European Commission (updated 16.04.2020).

Figure 41. **IMPORT PRICE OF FROZEN SCALLOPS INCLUDING QUEEN SCALLOPS FROM THE UNITED STATES**



Source: European Commission (updated 16.04.2020).

The price of **frozen scallops including queen scallops** (CN code 03072290) from **the United States** was 18,31 EUR/kg in **week 14**. This represented an increase of 28% from the preceding four-week average (14,34 EUR/kg), and a decrease of 7% from the previous year (19,79 EUR/kg). The recorded volume of 0,5 tonnes in week 14 was significantly lower than both the four-week average (26 tonnes, -98%), and the previous year (1,8 tonnes, -75%). Price oscillated from 8,86 EUR/kg to 22,76 EUR/kg and exhibited an increasing trend over the observed period, while volume decreased. Price does not seem to correlate directly with supply, which varies from 0,010 tonnes (week 10 of 2018) to 176 tonnes (week 40 of 2018). The spike in price in week 22 of 2017 does not correspond to a sudden decrease in supply. France, the Netherlands, and the UK are the EU's biggest importers.

²² Prices for weeks 7 and 10 of 2020.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In February 2020, relative to February 2019, the consumption of fresh fisheries and aquaculture products increased in both volume and value in the majority of the Member States analysed – the exceptions being Ireland and Italy, where the opposite trend was observed. In Spain, volume decreased while value increased. In France, value increased and volume remained unchanged.

The decrease seen in Ireland was mainly due to a drop in consumption of cod and saithe (-24% and -43%, respectively). In Italy, lower consumption of clam and hake contributed to the overall decrease in household consumption.

A rise in salmon and cod consumption (+76% and +22%, respectively) was the reason for the notable increases in Sweden.

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

Country	Per capita consumption 2017* (live weight equivalent, LWE) kg/capita/year	February 2017		February 2019		January 2020		February 2020		Change from February 2019 to February 2020	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	27,0	879	14,17	892	14,88	1.145	16,77	1.019	17,81	14%	20%
France	33,7	16.592	182,75	16.707	192,24	14.629	215,10	16.675	206,62	0%	7%
Germany	13,4	5.307	72,72	5.408	77,76	5.013	96,73	5.772	94,00	7%	21%
Hungary	5,6	226	1,28	337	2,10	400	2,45	479	3,03	42%	44%
Ireland	23,0	1.049	14,90	1.069	15,22	897	18,57	960	13,55	10%	11%
Italy	30,9	25.534	271,66	24.752	261,35	22.414	322,75	22.978	246,42	7%	6%
Netherlands	21,1	2.120	32,36	2.278	36,82	2.305	44,50	2.473	39,29	9%	7%
Poland	15,0	4.528	25,69	3.889	23,99	3.600	30,56	4.081	27,20	5%	13%
Portugal	56,8	3.898	25,46	4.378	27,60	4.036	31,43	4.454	29,93	2%	8%
Spain	45,6	48.264	366,17	47.992	371,00	44.557	405,95	47.722	388,85	1%	5%
Sweden	26,6	816	10,14	614	7,75	522	12,43	859	11,94	40%	54%

Source: EUMOFA, based on Europanel (updated 22.04.2020).

*Data on per capita consumption of all fish and seafood products for all EU Member States can be found at: https://eumofa.eu/documents/20178/157549/EN_The+EU+fish+market_2020.pdf

Over the past three years, Denmark and Germany were the only Member States where the average household consumption of fresh fisheries and aquaculture products in the month of February was above the annual average in both volume and value. In Spain, value was the same as the annual average, while volume was below. In the rest of the Member States analysed, the average household consumption has been below average.

The most recent weekly consumption data (up to week 21 of 2020) are available on the EUMOFA website, and can be accessed [here](#).

3.2. Fresh herring

Habitat: An oily pelagic species that may be found anywhere between 2m and 400m below the sea surface²³.

Catch area: North Atlantic, in the Baltic waters, the North Sea, West of Scotland.

Producing countries in the EU: Sweden, Denmark, Ireland.

Production method: Caught.

Main consumers in the EU: Sweden, Denmark, Germany, Latvia, Lithuania.

Presentation: Whole, filleted.

Preservation: Fresh, smoked, canned, frozen.

Means of preparation: Grilled, fried, baked.



3.2.1. General overview of household consumption in Germany, the Netherlands, and Sweden

In 2017, the per capita apparent consumption of fisheries and aquaculture products was 26,6 kg in Sweden, amongst the highest in the EU and 9% above the EU average (24,3 kg). However, Swedish apparent consumption decreased 1,8% relative to the previous year²⁴.

In the Netherlands, per capita apparent consumption was 21,1 kg, which was 21% lower than that of Sweden and 13% lower than the EU average. Compared to 2016, apparent consumption in the Netherlands increased slightly (by 0,5%).

Per capita apparent consumption of all fisheries and aquaculture products was 13,4 kg in Germany, amongst the lowest in the EU and 45% lower than the EU average. German apparent consumption decreased by 5% compared to the previous year. See more on per capita apparent consumption in the EU in Table 3.

Over the past three years, the Netherlands has shown the highest levels of household consumption of fresh herring out of the three Member States surveyed: 37% higher than Germany and approximately six times that of Sweden. Dutch consumers also spent the most for a kilogram of fresh herring (13,98 EUR/kg on average), while those in Sweden spent the least (6,50 EUR/kg).

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

First sales: Denmark [3/2019](#), [1/2018](#), [3/2015](#), [4/2014](#), [March 2013](#); Latvia [5/2016](#), [5/2015](#); the Netherlands [3/2019](#); Poland [1/2018](#); Sweden [3/2019](#), [5/2016](#), [November-December 2013](#).

Consumption: Germany [2/2018](#), [2/2016](#); Estonia [6/2015](#); the Netherlands [2/2018](#); Latvia [November-December 2013](#); Lithuania [6/2015](#), [November-December 2013](#); Poland [6/2015](#), [November-December 2013](#); Sweden [2/2018](#), [2/2016](#); the UK [2/2016](#), [6/2015](#).

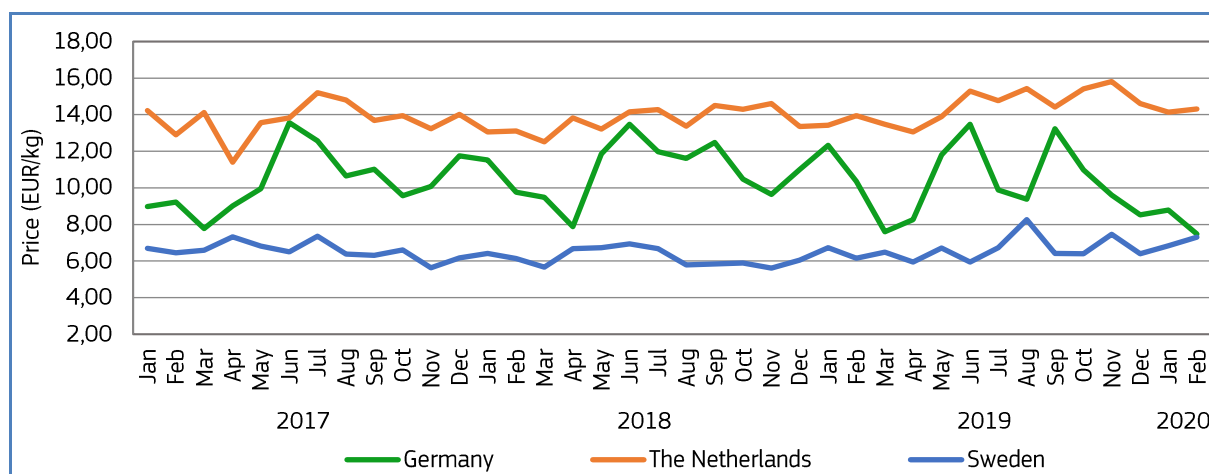
Extra-EU Import: Norway [1/2018](#), [9/2018](#), [3/2019](#), [10/2019](#), [1/2020](#), [3/2020](#); Iceland [1/2018](#).

Topic of the month: Atlantic herring in the EU [4/2018](#), Preserved herring in glass jars in Sweden [12/2016](#), Trade in the EU [5/2018](#), [4/2015](#).

²³ <http://www.fao.org/3/x5933e/x5933e01.htm>

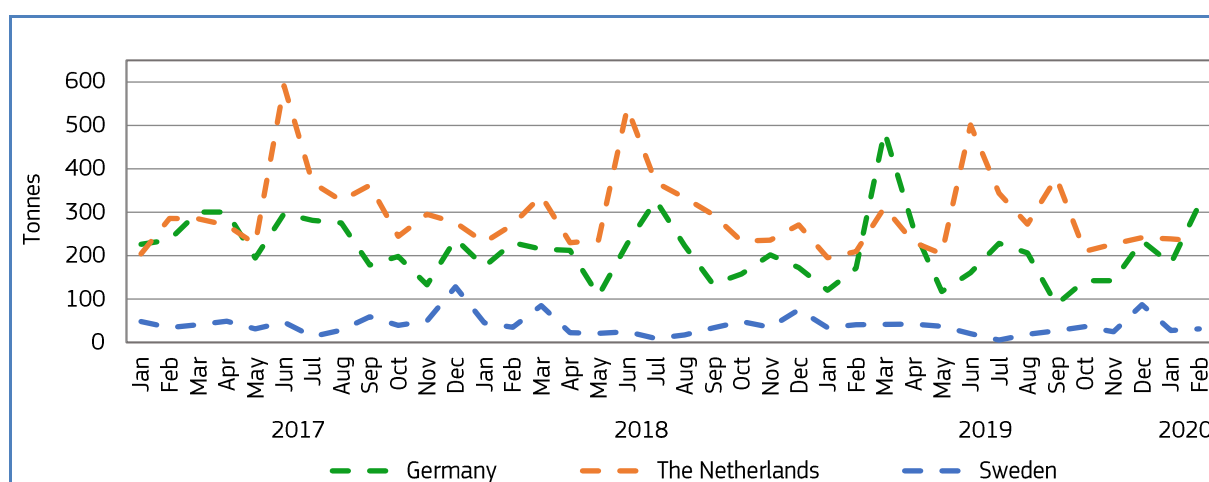
²⁴ 2017 is the most recent year that data are available.

Figure 42. **PRICES OF FRESH HERRING PURCHASED BY HOUSEHOLDS**



Source: EUMOFA, based on Europanel (updated 22.04.2020).

Figure 43. **HOUSEHOLD PURCHASES OF FRESH HERRING**



Source: EUMOFA based on Europanel (updated 22.04.2020).

3.2.2. Consumption trends in Germany

Long-term trend (January 2017 to February 2020): Decreasing in both price and volume.

Yearly average price: 10,34 EUR/kg (2017), 10,93 EUR/kg (2018), 10,45 EUR/kg (2019).

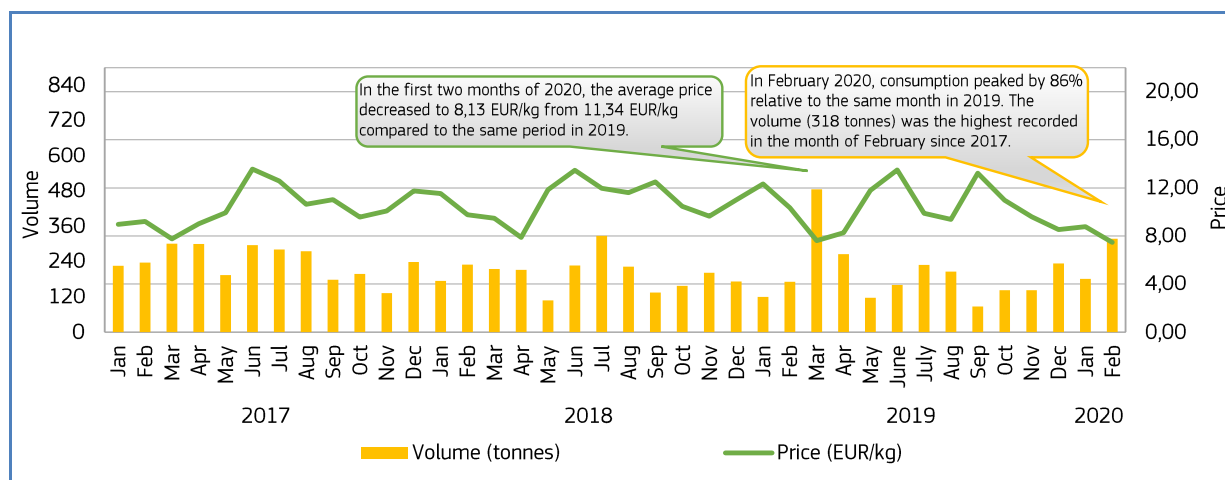
Yearly consumption: 2.859 tonnes (2017), 2.385 tonnes (2018), 2.361 tonnes (2019).

Short-term trend (January 2020 to February 2020): Increasing in volume and decreasing in price.

Average price: 8,13 EUR/kg.

Average consumption: 499 tonnes.

Figure 44. RETAIL PRICE AND VOLUME OF FRESH HERRING PURCHASED BY HOUSEHOLDS IN GERMANY



Source: EUMOFA, based on Europanel (updated 22.04.2020).

3.2.3. Consumption trends in the Netherlands

Long-term trend (January 2017 to February 2020): Increasing in price and decreasing in volume.

Yearly average price: 13,74 EUR/kg (2017), 13,69 EUR/kg (2018), 14,46 EUR/kg (2019).

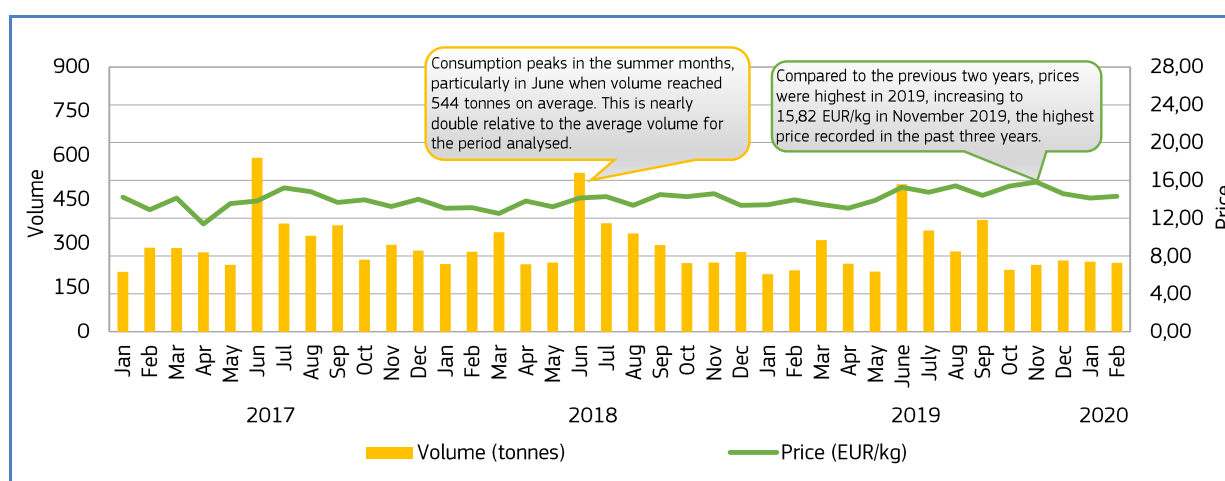
Yearly consumption: 3.735 tonnes (2017), 3.581 tonnes (2018), 3.327 tonnes (2019).

Short-term trend (January 2020 to February 2020): Decreasing slightly in volume and increasing in price.

Average price: 14,22 EUR/kg.

Average consumption: 472 tonnes.

Figure 45. RETAIL PRICE AND VOLUME OF FRESH HERRING PURCHASED BY HOUSEHOLDS IN THE NETHERLANDS



Source: EUMOFA, based on Europanel (updated 22.04.2020).

3.2.4. Consumption trends in Sweden

Long-term trend (January 2017 to February 2020): Increasing slightly in price and decreasing in volume.

Yearly average price: 6,57 EUR/kg (2017), 6,20 EUR/kg (2018), 6,64 EUR/kg (2019).

Yearly consumption: 569 tonnes (2017), 453 tonnes (2018), 417 tonnes (2019).

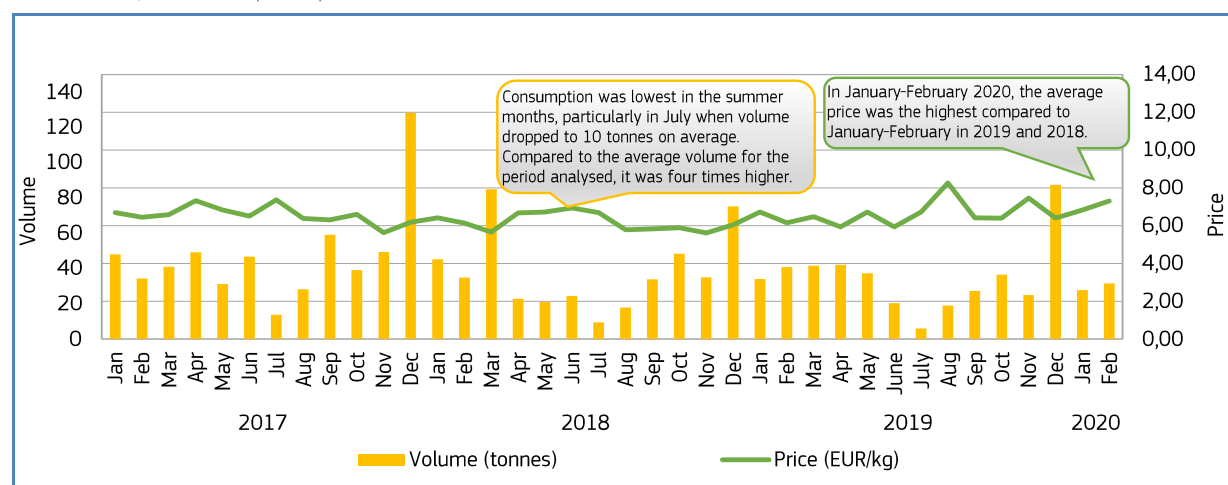
Short-term trend (January 2020 to February 2020): Increasing in both price and volume.

Average price: 7,07 EUR/kg.

Average consumption: 59 tonnes.

Figure 46. **RETAIL PRICE AND VOLUME OF FRESH HERRING PURCHASED BY HOUSEHOLDS IN SWEDEN**

Source: EUMOFA, based on Europanel (updated 22.04.2020).



4. Case study – Geographical indications (GIs) and traditional specialties guaranteed (TSG) in the seafood sector

4.1. General background

Geographical indications (GIs) refer to Protected Designations of Origin (PDOs) and Protected Geographical Indications (PGIs). In addition, a third scheme is related to traditional aspects, namely the Traditional Specialities Guaranteed (TSG)²⁵. The distinctions between each, according to the relevant EU Regulation on PDO/PGI/TSG in the agricultural and foodstuffs sector²⁶, are outlined below:

- For **Protected Designations of Origin (PDOs)**, all stages of production must take place in the protected area and there must be a strong link between the origin of the products and its quality.
- For **Protected Geographical Indications (PGIs)**, at least one production step must take place in the protected area; the quality, reputation or other characteristic of the product must be essentially attributable to the geographical origin.
- For **Traditional Specialities Guaranteed (TSG)**, there is no protected geographical area. Instead, this scheme aims to register traditional recipes.

Geographical indications have been developed and supported by public authorities since the 19th century. At first, this mainly concerned processed products, exported out of their production area, such as wine, cheese, and ham for which there was a need to guarantee the origin and the quality. At EU level, the GI scheme was developed with the Common Market Organisation (CMO) in the wine sector in the 1970s. In a context of overproduction, GIs aimed at producing less wine, but of better quality. This historical perspective explains the large importance of wine, cheese, and ham under GI. The recognition of other types of products under GI at EU level came in the 1980s with spirit drinks and in the 1990s with agricultural products and foodstuffs²⁷, including fisheries and aquaculture products (FAP). The objectives were, in addition to the protection of intellectual property rights, to differentiate the product on the market, increase producer income, support rural development, and preserve local know-how and patrimony. These different objectives led to the registration of different types of GI and TSG in terms of product coverage, scale of production, and markets.

4.2. Logos for PDO/PGI/TSG

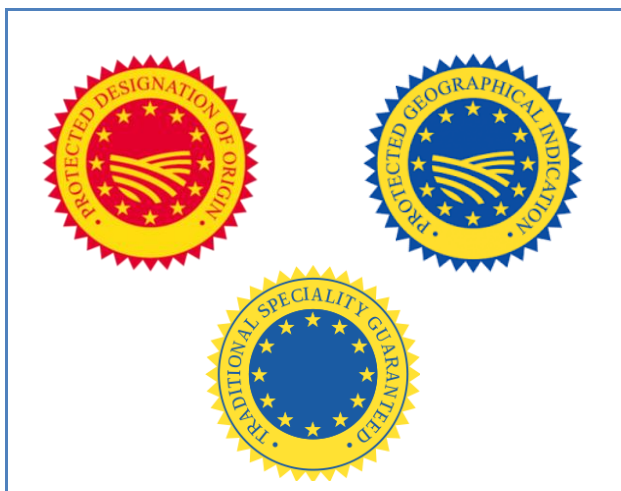
The products marketed under PDO, PGI and TSG schemes in the agricultural and foodstuffs sector bear the relevant EU logo, displayed below.

²⁵ More details on DG AGRI website: https://ec.europa.eu/info/food-farming-fisheries/food-safety-and-quality/certification/quality-labels/quality-schemes-explained_en

²⁶ Regulation (EU) No 1151/2012 of the European Parliament and of the Council of 21 November 2012 on quality schemes for agricultural products and foodstuffs: <https://eur-lex.europa.eu/eli/reg/2012/1151/oj>

²⁷ National schemes for GIs exist prior to EU schemes in some countries.

Figure 47. **EU LOGOS FOR PDO,PGI AND TSG**



Awareness of PDO, PGI and TSG logos among EU citizens is relatively low, according to data from Eurobarometer 473²⁸: 18% for the PDO logo, 18% for the PGI logo and 15% for the TSG logo. There were large disparities in logo awareness between the various Member States (MS), with the highest awareness relating to the PDO logo in France (45%) and Italy (32%), and the lowest in Denmark, Malta, Romania, and the United Kingdom (5%). This level of awareness is below that of the EU organic logo (27% at EU level, according to Eurobarometer 473) and below that of logos from national schemes such as German or French organic schemes, Quality Food from Hungary scheme, Label Rouge (France) and Quality South Tyrol (Italy) which boast awareness of at least 60% nationally²⁹. The identification of these products on the market is based on these logos (for which consumer awareness is limited), and the protected names, which have much wider recognition. As an example, the awareness of the PDO "Parmigiano Reggiano" is higher than the awareness of the PDO logo.

In addition to the EU Logos, some producer groups request the use of an additional logo for the products sold under GI/TSG. This is the case for the PGI "Oberlausitzer Biokarpfen" and the PGI "Mojama de Barbate".

Figure 48. **LOGOS FOR PGI "OBERLAUSITZER BIOKARPFEN" AND PGI "MOJAMA DE BARBATE"**



Source: Producer groups of the concerned GIs.

4.3. 53 GIs/TSGs in the seafood sector

More than 30 names registered over the last 10 years

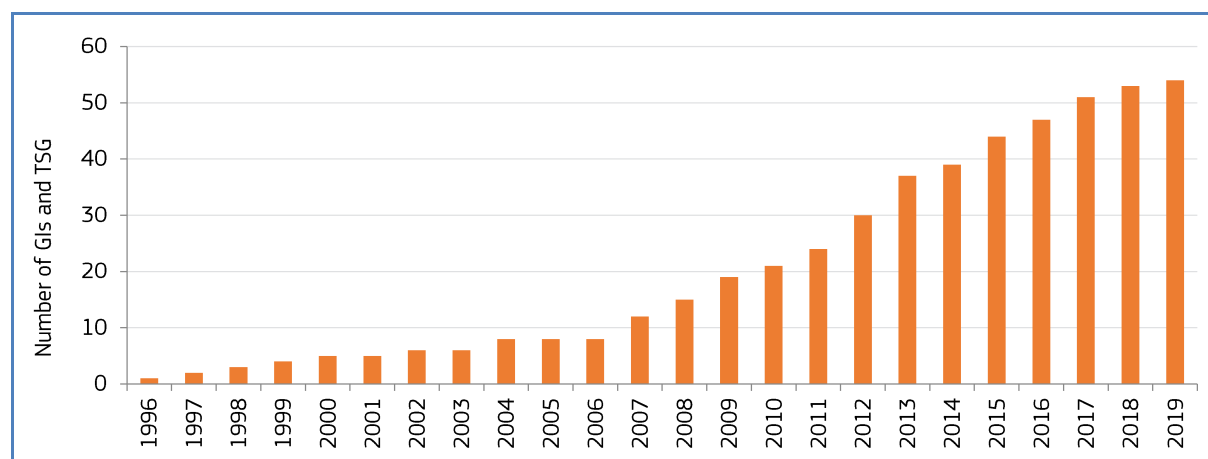
As of May 2020, there are more than 3.300 names registered under GI and TSG, including 53 names protected in the seafood sector (36 from the EU-27, 14 from the UK and 3 from other third countries). The first GI and TSG registrations for

²⁸Europeans, Agriculture and the CAP", 2017 data, published in 2018.

²⁹Hartmann M. et al., Quantitative research findings on European consumers' perception and valuation of EU food quality schemes as well as their confidence in such measures, Strength2Food, 2018.

agricultural products and foodstuffs were registered at EU level in 1996³⁰, including one seafood product, the PDO “Avgotaracho Messolongiou” in Greece (processed fish eggs). From 1996 to 2006, few (0-2) new names were registered each year for fishery and aquaculture products. Registrations increased in 2007, with up to 7 names registered in 2013. The name registered most recently is the PGI “Bulot de la Baie de Granville” in France (February 2019).

Figure 49. **NUMBER OF NAMES REGISTERED UNDER GI/TSG EACH YEAR**



Source: eAmbrosia database – DG AGRI³¹.

Names are registered in a total of 14 Member States (MS) and 4 third countries. The main MS concerned include Germany, France, Italy, and Spain, with 5 to 7 names registered in each. This is followed by Czechia, Finland, and Romania (with 2 names registered), and the Netherlands, Latvia, Portugal, China, Poland, Sweden, Ireland and Greece (with one name registered in each). A total of 17 names are registered in third countries: 14 in the UK and 1 in China, Norway, and Vietnam.

A large range of products is covered by GI/TSG: wild caught, farmed, fresh, and processed

Among the 53 names protected under GI and TSG, 31 are wild caught species (58%), 21 are farmed products (40%), and one is both farmed and wild caught (2%). Among the 53 names, 36 are PGIs, 14 are PDOs, and three are registered under TSG.

There is a wide range of products with protected names, covering both fresh (43% of the protected names) and processed products (36%). Some GI and TSG registrations cover both presentations: fresh and processed (21%). The key processing methods are smoking, drying, and salting.

Protected wild caught finfish species include:

- **Tuna** (3 names): PGIs “Melva de Andalucia”, “Mojama de Barbate”, and “Mojama de Isla Cristina” in Spain;
- **Anchovy** (3 names): PGI “Anchois de Collioure” (France), PGI “Acciughe sotto sale del Mar Ligure” (Italy), and PDO “Phú Quốc” (China);
- **Vendace** (3 names): PDO “Kalix Löjrom” (Sweden), PGI “Puruveden muikku” (Finland), and PDO “Kitkan viisas” (Finland);
- **Cod** (3 names): TSG “Bacalhau de Cura Tradicional Portuguesa” (Portugal); PGI “Traditional Grimsby Smoked Fish” (UK), and PGI “Tørrfisk fra Lofoten” (Norway);
- **Herring** (2 names): TSG “Hollandse maatjesharing / Hollandse Nieuwe / Holländischer Matjes” (the Netherlands) and PGI “Glückstädter Matjes” (Germany);
- **Salmon** (2 names): PGIs “Scottish Wild Salmon” and “West Wales Coracle Caught Salmon” (UK);
- **Other species** are carp, haddock, herring, eel, lamprey, mackerel, pilchard and pontic shad.

³⁰ Council Regulation (EC) No 2081/92 of 14 July 1992 on the protection of geographical indications and designations of origin for agricultural products and foodstuffs.

³¹ Link to eAmbrosia: <https://ec.europa.eu/info/food-farming-fisheries/food-safety-and-quality/certification/quality-labels/geographical-indications-register/>

Protected farmed finfish species include:

- **Carp** (8 names): names are registered in Germany, Czechia, and Poland (6 PGIs and 2 PDOs), the oldest one being “Oberpfälzer Karpfen” registered in 2002. The most recently registered is the PGI “Oberlausitzer Biokarpfen”, which is 100% organic (registered in 2015);
- **Trout** (2 names): PGI “Schwarzwaldforelle” (Germany) and PGI “Trote del Trentino” (Italy);
- **Salmon** (2 names): PGI “Clare Island Salmon” (Ireland), PGI “London Cure Smoked Salmon” (UK)³², and PGI “Scottish Farmed Salmon” (UK);
- **Other species** are mullet, tench, and char with one name registered for each species (Greece and Italy).

Protected molluscs and crustaceans are from both wild catches and aquaculture, and include:

- **Mussel** (5 names): PDO “Mejillón de Galicia; Mexillón de Galicia” (Spain), PDO “Moules de Bouchot de la Baie du Mont-Saint-Michel” (France), PDO “Cozza di Scardovari” (Italy), TSG “Moules de Bouchot” (France) and PDO “Conwy Mussels” (UK);
- **Oyster** (3 names): PGI “Huîtres Marennes Oléron” (France), PGI “Whitstable oysters” (UK) and PDO “Fal Oyster” (UK);
- **Scallop** (2 names): PGI “Coquille Saint-Jacques des Côtes d’Armor” (France) and “Isle of Man Queenies” (UK);
- **Other species** are whelk: PGI “Bulot de la Baie de Granville” (France), and crayfish: PGI “Ancheng Long Xia” (China).

Details on the 53 names registered are provided in the next table.

³² The specification of PGI “London Cure Smoked Salmon” allows the use of farmed and wild caught salmon.

Table 4. LIST OF REGISTERED NAMES UNDER PDO, PGI, TSG AND MAIN FEATURES

EU-27 / non-EU	Protected name	PDO / PGI / TSG	Country	Year of registr- ation	Species	Wild caught / farmed / both	Fresh / processed / both
EU-27	Bulot de la Baie de Granville	PGI	FR	2019	Whelk	Wild caught	Both
	Scrumbie de Dunăre afumată	PGI	RO	2018	Pontic shad	Wild caught	Processed
	Novac afumat din Țara Bârsei	PGI	RO	2017	Carp	Wild caught	Processed
	Mojama de Barbate	PGI	ES	2016	Tuna	Wild caught	Processed
	Mojama de Isla Cristina	PGI	ES	2016	Tuna	Wild caught	Processed
	Hollandse maatjesharing / Hollandse Nieuwe / Holländischer Matjes	TSG	NL	2015	Herring	Wild caught	Processed
	Carnikavas nēgi	PGI	LV	2015	Lamprey	Wild caught	Both
	Glückstädter Matjes	PGI	DE	2015	Herring	Wild caught	Processed
	Oberlausitzer Biokarpfen	PGI	DE	2015	Carp	Farmed	Both
	Moules de Bouchot	TSG	FR	2014	mussel	Farmed	Fresh
	Bacalhau de Cura Tradicional Portuguesa	TSG	PT	2013	cod	Wild caught	Processed
	Puruveden muikku	PGI	FI	2013	Vendace	Wild caught	Fresh
	Trote del Trentino	PGI	IT	2013	Trout	Farmed	Fresh
	Salmerino del Trentino	PGI	IT	2013	Char	Farmed	Fresh
	Kitkan viisas	PDO	FI	2013	Vendace	Wild caught	Fresh
	Cozza di Scardovari	PDO	IT	2013	Mussel	Farmed	Fresh
	Aischgründer Karpfen	PGI	DE	2012	Carp	Farmed	Fresh
	Fränkischer Karpfen / Frankenkarpfen / Karpfen aus Franken	PGI	DE	2012	Carp	Farmed	Fresh
	Moules de Bouchot de la Baie du Mont-Saint-Michel	PDO	FR	2011	Mussel	Farmed	Fresh
	Karp zatorski	PDO	PL	2011	Carp	Farmed	Fresh
	Kalix Ljörom	PDO	SE	2010	Vendace	Wild caught	Processed
	Melva de Andalucia	PGI	ES	2009	Tuna	Wild caught	Processed
	Caballa de Andalucia	PGI	ES	2009	Mackerel	Wild caught	Processed
	Huîtres Marennes Oléron	PGI	FR	2009	Oyster	Farmed	Fresh
	Acciughe sotto sale del Mar Ligure	PGI	IT	2008	Anchovy	Wild caught	Processed
	Tinca Gobba Dorata del Pianalto di Poirino	PDO	IT	2008	Tench	Farmed	Fresh
	Třeboňský kapr	PGI	CZ	2007	Carp	Farmed	Both
	Holsteiner Karpfen	PGI	DE	2007	Carp	Farmed	Fresh
	Mejillón de Galicia / Mexillón de Galicia	PDO	ES	2007	Mussel	Farmed	Fresh
	Pohořelický kapr	PDO	CZ	2007	Carp	Farmed	Both
	Anchois de Collioure	PGI	FR	2004	Anchovy	Wild caught	Processed
	Oberpfälzer Karpfen	PGI	DE	2002	Carp	Farmed	Both
	Schwarzwaldforelle	PGI	DE	2000	Trout	Farmed	Both
	Clare Island Salmon	PGI	IE	1999	Salmon	Farmed	Fresh
	Coquille Saint-Jacques des Côtes d'Armor	PGI	FR	1998	Scallop	Wild caught	Fresh
	Avgotaracho Messolongiou	PDO	EL	1996	Mullet	Farmed	Processed
Non-EU	Lough Neagh Pollan	PDO	UK	2018	Pollan	Wild caught	Both
	London Cure Smoked Salmon	PGI	UK	2017	Salmon	Both	Processed
	West Wales Coracle Caught Sewin	PGI	UK	2017	Trout	Wild caught	Both
	West Wales Coracle Caught Salmon	PGI	UK	2017	Salmon	Wild caught	Both
	Conwy Mussels	PDO	UK	2016	Mussel	Wild caught	Fresh
	Tørrfisk fra Lofoten	PGI	NO	2014	Cod	Wild caught	Processed
	Fal Oyster	PDO	UK	2013	Oyster	Wild caught	Fresh
	Ancheng Long Xia	PGI	CN	2012	Cray fish	Wild caught	Processed
	Scottish Wild Salmon	PGI	UK	2012	Salmon	Wild caught	Fresh
	Phú Quốc	PDO	VN	2012	Anchovy	Wild caught	Processed
	Isle of Man Queenies	PDO	UK	2012	Scallop	Wild caught	Fresh
	Lough Neagh Eel	PGI	UK	2011	Eel	Wild caught	Fresh
	Cornish Sardines	PGI	UK	2010	Sardine	Wild caught	Both
	Traditional Grimsby Smoked Fish	PGI	UK	2009	Cod / haddock	Wild caught	Processed
	Scottish Farmed Salmon	PGI	UK	2008	Salmon	Farmed	Fresh
	Arbroath Smokies	PGI	UK	2004	Haddock	Wild caught	Processed
	Whitstable oysters	PGI	UK	1997	Oyster	Farmed	Fresh

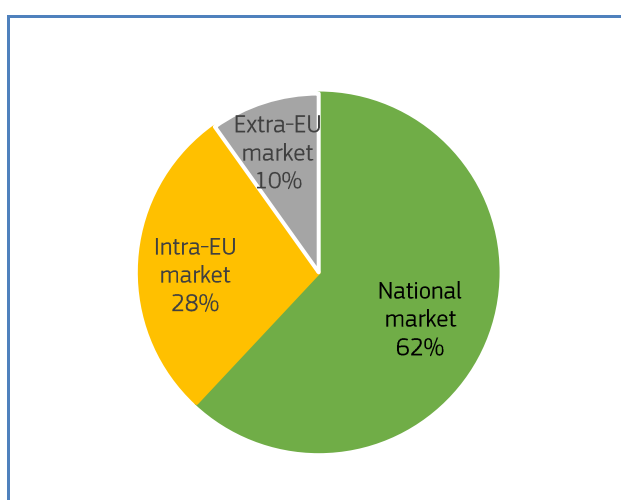
Source: EUMOFA based on eAmbrosia database (DG AGRI).

4.4. EUR 1,42 billion sales value under GI/TSG in the seafood sector

Sales value under GI/TSG

Based on a recent study published by the European Commission³³, in 2017, the sales value of the 3.207 protected names registered at EU-28 level was estimated at EUR 77,2 billion. The main sector under GI/TSG is the wine sector, accounting for 51% of the sales value (EUR 39,4 billion), followed by agricultural products and foodstuffs (35% of the sales value, EUR 27,3 billion) and spirit drinks (13% of the sales value, EUR 10,4 billion). Protected names accounted for 7% of the EU food and drink sector, and up to 10-15% in some Member States (such as France, Italy, and Portugal) due to the importance of wine and large PDOs and PGIs in the cheese and ham sectors. We observe large differences in economic features at the EU level. In particular, the nine largest GIs (over EUR 1 billion) gathered 27% of the total sales value. The turnover of half of the GIs was under EUR 1,1 million and 7% of the protected names were not even used on the market.

Figure 50. **BREAKDOWN OF SALES VALUE BY MARKET FOR PRODUCTS UNDER GI/TSG IN THE SEAFOOD SECTOR IN 2017**



Source: DG AGRI study on the value of GIs and TSGs products, 2019.

In 2017, the sales volume of fish, molluscs, and crustaceans sold under GI/TSG was estimated to reach 246.709 tonnes and EUR 1,42 billion. This accounted for 5% of the sales value for agricultural products and foodstuffs under GI/TSG. It covered the 43 protected names registered in the EU-28 before 2017. More than half of the sales were on the domestic market (62%, EUR 0,88 billion), followed by intra-EU trade (28%, EUR 0,4 billion) and extra-EU trade (10%, EUR 0,14 billion). Sales value was 48% higher in 2017 compared to 2015. This growth was largely due to the registration of new names.

In 2017, there were 28 PGIs of fishery and aquaculture products that accounted for 71% of sales value, 3 TSG registrations accounting for 22%, and 12 PDOs accounting for 7% of sales value. The average size of PGI and TSG registrations ranged from EUR 32 million to EUR 36 million in 2017, while the average size of PDOs was much smaller: EUR 8 million.

The UK and France accounted for 88% of the total sales value in 2017. The UK was the top producer, mainly driven by the leading PGI “Scottish Farmed Salmon”. In France, the largest GIs and TSG concern shellfish: TSG “Moule de Bouchot”, PGI “Huîtres Marennes Oléron”, and PDO “Moules de Bouchot de la Baie du Mont-Saint-Michel”³⁴.

³³ Study on economic value of EU quality schemes, geographical indications (GIs) and traditional specialties guaranteed (TSG), AND International for DG AGRI, 2019 - https://ec.europa.eu/commission/presscorner/detail/en/IP_20_683

³⁴ <https://www.inao.gouv.fr/Nos-actualites/Publication-de-la-brochure-chiffres-cles-2017>

Table 5. **SALES VALUE UNDER PDOs, PGIs AND TSG REGISTERED IN THE EU-28 FOR SEAFOOD PRODUCTS FROM 2015 TO 2017 (value in million EUR)**

	2015	2016	2017	% 2017	Evolution 2017/2015
PDO	99	98	97	7%	-2%
PGI	802	885	1.013	71%	+26
TSG	60	305	312	22%	+420%
Total	962	1.288	1.421	100%	+48%

Source: DG AGRI study on the value of GIs and TSGs products, 2019.

At the EU Level, in 2017, the total sales value of the FAP sector ranged between EUR 27,68 billion (processing and preserving activities only)³⁵ and EUR 39,96 billion (including processing and preserving activities, landings and aquaculture³⁶. Thus, based on these assumptions, products with protected names accounted for 3,5% to 5,1% of the sales value of the EU seafood sector. By comparison, this is far below the main sectors under GI/TSG where 56% of the EU wine³⁷ and 21% of cheese³⁸ are marketed under GI/TSG (in volume). However, the importance of GI/TSG for seafood products is comparable to other food sectors³⁹, for example:

- **Fruit and vegetables:** products with a GI/TSG accounted for 2-4% of national production in France, Spain, and Italy (in value).
- **Meat products:** products with a GI/TSG accounted for 4% and 6% of the national production in France and Germany (in value).
- Protected GIs accounted for 3% of the EU **olive oil** production (in value)⁴⁰.

The importance of GI and TSG status is also comparable to the share of the organic scheme in the aquaculture sector, which was estimated at 3,8% of the total EU aquaculture production in 2015⁴¹.

Value premium for GI products

The value premium for GI products has been calculated for each sector in the context of the European Commission study. This is based on the price premium for each GI, weighted by the volume sold. Price or value premium may not be directly linked to better profitability as products under GI/TSG may also have additional production costs. However, this is an indicator for the market positioning of the products under GI.

The value premium for seafood products under a GI was estimated at 1,35 in 2017. This means that the sales value of GI products was estimated to be 1,35 higher than comparable products without GI for the same volume. As a comparison, the value premium for agricultural products and foodstuffs was 1,50, which was particularly high for cheese (1,60) and meat products (1,53). The value premium was higher for the seafood sector than for other large sectors covered by GI schemes, such as beer (1,26), fresh meat (1,20), and fruit and vegetables (1,12). The value premium indicates a recognised differentiation on the market for seafood products bearing a GI.

Success factors for GI/TSG value chains

Among the wide number of registered GIs and TSG, some have met with great market success, whereas others are not even used by stakeholders. As detailed by Barjolle and Sylvander (2003)⁴², the convergence of several factors is necessary, including the specificity of the products, relevance of the marketing strategy, coordination among stakeholders, governance, and support from public authorities. The type of product, and country of origin also play a role, but these are not decisive factors in determining the success of a GI/TSG. The registration under GI/TSG does not create this market differentiation from scratch. The registration allows for the intellectual protection of GIs, and provides a framework for the implementation

³⁵ EUROSTAT – Structural business statistics, turnover for processing and preserving of seafood products.

³⁶ EUMOFA: Sales value for landings are EUR 7,22 billion for landings and EUR 5,06 billion for the value of aquaculture. This is an over-estimate of the sales value of the FAP sector, with double counts between landings / aquaculture stage and processing / preserving stage.

³⁷ Based on Study on economic value of EU quality schemes, geographical indications (GIs) and traditional specialties guaranteed (TSG), AND International for DG AGRI, 2019.

³⁸ 10,17 million tonnes of cheese produced at EU 28 level in 2017 based on EUROSTAT and 1,24 million tonnes under GI/TSG based on DG AGRI study.

³⁹ Based on Study on economic value of EU quality schemes, geographical indications (GIs) and traditional specialties guaranteed (TSG), AND International for DG AGRI, 2019.

⁴⁰ EUR 301 million under GI/TSG based on AND-I survey for DG AGRI and EUR 9,57 billion sales value at EU level based on EUROSTAT-Prodcom.

⁴¹ Source: EU organic aquaculture, EUMOFA, 2017: https://www.eumofa.eu/documents/20178/84590/Study+report_organic+aquaculture.pdf

⁴² Facteurs de succès des produits d'origine certifiée dans les filières agro-alimentaires, Barjolle and Sylvander, 2003.

of this differentiation strategy by stakeholders. The value premium for seafood products under GI illustrates this market differentiation.

The coordination and governance of GI/TSG value chains concern: 1) the definition of a collective strategy, 2) the definition of GI/TSG specifications in line with local context and market demand, and 3) the control of these specifications. Governance that involves all stages of the supply chain, and the definition of production rules for the upstream stages (this is not the case for all GI and TSG registrations) may allow a better distribution of benefits across the supply chain. In addition, GIs and TSG address quality management (production rules and controls), which may provide a positive signal for retailers and final consumers.

4.5. Focus on France, Spain, Germany, and Norway

France: Mainly mussel and oyster

There are six names registered as a GI or TSG in the seafood sector in France. The TSG **“Moule de Bouchot”** (mussel) and PGI **“Huître de Marennes Oléron”** (oyster) were the main protected names in the seafood sector in France in 2018⁴³. The TSG **“Moule de Bouchot”** aims to differentiate mussels farmed using the *“bouchot”* method (*“bouchot”* consists of a wooden pole where mussels are grown) from imported mussels on the French market.

There is another name registered in France in the mussel sector: PDO **“Moules de bouchot de la Baie du Mont-Saint-Michel”**, produced in the bay of Mont-Saint-Michel in western France. 10.000 tonnes of PDO are produced each year, generating about EUR 25 million turnover in the territory⁴⁴. About 90% of the local production is marketed under PDO. The remaining 10% mainly consists of smaller mussels discarded in the grading process and mussels collected outside of the official PDO harvest season. Mussel production in Mont-Saint-Michel Bay was initially under a commercial brand. However, stakeholders faced misuse of the name «Mont-Saint-Michel» and decided to register as a GI. Mussels under PDO are priced higher than the TSG, and volumes are also lower⁴⁵.

PGI **“Huître de Marennes Oléron”** was registered as a PGI in 2009. The oysters are produced in the Nouvelle-Aquitaine area. It had already been certified under the French certification scheme «Label Rouge» since 1989. At present, the oysters may be marketed under both PGI and «Label Rouge». There are different types of oysters covered by Marennes Oléron PGI, based on their finishing stage. The finishing is conducted in specific ponds located within the protected area. These ponds are locally called *“Claire”*, for instance the oyster *“fine de Claire”*. The finishing in *“Claire”* provides a specific taste and specific green colour for *“Fine de Claire verte”*.

Other French GIs in the seafood sector are PGIs *“Coquille Saint-Jacques des Côtes d'Armor”*, *“Anchois de Collioure”* and *“Bulot de la Baie de Granville”*.

Spain: Mussel, tuna loins, and preserved fish

There are five names protected in Spain. Detailed data are provided by the Spanish Ministry of Agriculture, Fisheries and Food (MAPA)⁴⁶. The total sales value was EUR 57,3 million in 2018, with 98,5% of sales on the national market. The five GIs are detailed below:

- **PDO “Mejillón de Galicia”** was registered in 2007. It covers fresh and preserved mussels produced in Galicia. The cultivation area is the internal maritime area of the Galician rías in the provinces of A Coruña and Pontevedra. The area for the purification and dispatch is the coastal provinces of A Coruña and Pontevedra. The sales value under PDO was EUR 27,3 million in 2018 (48% of the sales value for seafood products under GI in Spain) with an average price of 2,96 EUR/kg. The total production was 54.042 tonnes in 2018, among which 9.245 tonnes were marketed under PDO. The PDO only covers fresh product and a large share of the local production is aimed at processing⁴⁷, this explains the difference between the volume produced under PDO and the actual volume marketed under PDO. This is common for products under GI/TSG, that all the volumes produced in compliance with

⁴³ INAO: <https://www.inao.gouv.fr/Publications/Donnees-et-cartes/Informations-economiques>

⁴⁴ L. Gauvrit and B. Schaer in Sustainability of European food quality schemes, section “PDO Saint-Michel's Bay Bouchot Mussels in France”, 2019.

⁴⁵ L. Gauvrit and B. Schaer in Sustainability of European food quality schemes, section “PDO Saint-Michel's Bay Bouchot Mussels in France”, 2019.

⁴⁶ https://www.mapa.gob.es/es/alimentacion/temas/calidad-agroalimentaria/informadop_igp_2018_ver6_tcm30-513985.pdf

⁴⁷ <https://www.elcorreogallego.es/hemeroteca/record-mexillon-galicia-sella-casi-siete-vecas-bivalvo-2010-KRCG1216590>

the specifications are not marketed under the scheme. This depends on the strategy of the stakeholders involved in the scheme and the demand of the market.

- **PDO “Melva de Andalucía”** covers preserved bullet tuna and frigate tuna in oil (*Auxis rochei* and *Auxis thazard*) and **PGI “Caballa de Andalucía”** covers preserved mackerel (*Scomber japonicus*). Production takes place in municipalities within the provinces of Almería, Cádiz, Granada, Huelva, and Málaga. Non-industrial methods are used, in which the fish is skinned by hand (without using chemicals) to ensure a high-quality product. The sales under these two GIs reached 2.584 tonnes and EUR 26,4 million in 2018 (46% of the sales value of seafood products under GI in Spain), with an average price of 13,89 EUR/kg for “Melva de Andalucía” and 8,07 EUR/kg for “Caballa de Andalucía”.
- **PGI “Mojama de Barbate”** and **PGI “Mojama de Isla Cristina”** are made from tuna loins (yellowfin tuna and bluefin tuna), which are cured through being seasoned and dried. “Mojama de Barbate” is produced in two municipalities from the Cádiz Region, and “Mojama de Isla Cristina” is produced in three communities from the Huelva Region. The products are vacuum-packed in transparent plastic bags or stored in glass jars containing olive or sunflower oil. The volume marketed for these two PGIs was 133 tonnes in 2018, for EUR 3,6 million sales value, with a price around 27 EUR/kg.

The table below summarises the economic data for each GI registered in Spain’s seafood sector.

Table 6. **ECONOMIC DATA ON THE SPANISH GIs IN THE FAP SECTOR IN SPAIN (2018)**

Protected name	Volume (tonnes)			Sales value (EUR million)	Proportion of total sales value (%)	Price EUR/kg	Proportion of sales volume on domestic market (%)
	Volume complying with GI specifications	Volume certified under GI	Volume marketed under GI				
PDO Mejillón de Galicia	54.042	54.042	9.245	27,3	48%	2,96	99,8%
PDO Melva de Andalucía	897	437	957	13,3	23%	13,89	99,2%
PGI Caballa de Andalucía	3.315	1.651	1.627	13,1	23%	8,07	91,5%
PGI Mojama de Barbate	76	76	76	2,1	4%	27,00	82,9%
PGI Mojama de Isla Cristina	76	57	57	1,5	3%	26,83	100,0%
Total	58.406	56.263	11.962	57,3	100%	4,79	98,5%

Source: MAPA – 2018 report on PDOs, PGIs and TSGs for agricultural products and foodstuffs.

Germany: Five names on farmed carp

There are seven names registered in Germany, all of which are PGIs: five names cover farmed carp, one covers farmed trout and one covers processed herring. The five names for farmed carp were registered between 2002 and 2015.

Each of these five PGIs covers mirror carp. Three of them are produced in Bavaria, one in Schleswig-Holstein, and another in Saxony. Each one has different PGI specifications in terms of weight of live fish (from 1 kg/fish up to 2,5 kg/fish), rearing duration (generally 3 or 4 years), fish fat content (lowest fat content being for **PGI “Oberlausitzer Biokarpfen”**: 0,4% to 5%), and the link with the protected area (at least one of the last two years of life spent in the protected area for **PGI “Aischgründer Karpfen”** and **PGI “Fränkischer Karpfen”**). **PGI “Oberlausitzer Biokarpfen”** is also 100% produced under an organic scheme. The following table provides an overview of these five PGIs.

Table 7. **FARMED CARP UNDER PGI IN GERMANY**

Protected name	Registration year	Geographical area	Weight (kg)
PGI Oberpfälzer Karpfen	2002	Oberpfalz area in Bavaria	Minimum 1,0 kg (generally between 1,5-2,0 kg)
PGI Holsteiner Karpfen	2007	Schleswig-Holstein	Minimum 1,5 kg (generally around 2,5 kg)
PGI Aischgründer Karpfen	2012	Aischgrund area in Bavaria	1,0-1,7 kg
PGI Fränkischer Karpfen	2012	Franconia area in Bavaria	1,0-1,7 kg
PGI Oberlausitzer Biokarpfen	2015	Bautzen and Görlitz areas in Saxony	1,3-2,5 kg

Source: EUMOFA based on single documents in eAmbrosia database (DG AGRI).

Norway: Dried cod under PGI – “TØRRFISK FRA LOFOTEN”⁴⁸

“Tørrfisk fra Lofoten” was registered at national level in 2007 and became a PGI at EU-level in 2014. The Lofoten region is a group of islands in the Northern part of Norway, which have long traditions in processing and preserving ground fish. “Tørrfisk fra Lofoten” is dried Atlantic cod (*Gadus morhua*) captured around Lofoten and Vesterålen from January to April.

“Tørrfisk” is the Norwegian term for “stockfish” (dried fish). The specification from the PGI indicates that the fish caught in this region has a different structure to fish caught in the deep sea, particularly with regard to its muscular flesh from long migrations. This structure gives it a unique quality that is essential to withstand the drying process. The fishery is close to the coast, which allows the fish to be landed the same day as the catch. The fish is processed in the Lofoten area, which includes six municipalities in Northern Norway. The fish is dried naturally, outdoors for 2 to 4 months.

Several motives led stakeholders to register a GI, including the objective of differentiating the local dried fish from dried fish produced elsewhere, the need for marketing coordination, and the good image of GIs on the Italian market (“Tørrfisk fra Lofoten” is an important Italian export).

The products are mainly exported, despite the increase in national consumption, which has increased in recent years and currently amounts to 15% of total production. Amongst other things, stockfish is used for preparing the traditional Christmas dish “Lutefisk”. Exports amounted to 3,049 tonnes in 2017 (65% of stockfish exported from Norway). The main market is Italy, comprising 70% of sales, followed by other EU MS (20%) and the USA (8%).

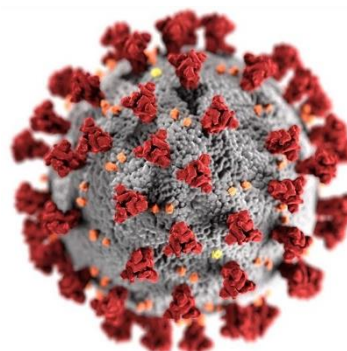
⁴⁸ This section is based on the information available on eAmbrosia and on V. Amilien, G.Vittersø, and T. Tangeland. in “Sustainability of European food quality schemes”, section “PGI Lofoten Stockfish in Norway”, 2019.

5. Case study – Impacts of COVID-19

EUMOFA have been following the effects of COVID-19 in the European seafood markets closely, releasing [weekly bulletins](#) with the latest updates⁴⁹. Regular contact with different stakeholders and analyses of available daily or weekly data over the past 2-3 months have formed the basis of this case study.

5.1. Introduction

COVID-19 is the name of the infectious disease caused by the most recently discovered coronavirus (SARS-CoV-2), unknown before its outbreak in Wuhan, China in December 2019⁵⁰. During the first months of 2020 the disease spread around the world and was classified as a pandemic by the World Health Organization (WHO) on 11th March. As of mid-May, more than 1.3 million people are reported to have been infected in Europe (4.3 million worldwide) and approximately 156.000 have died (more than 300.000 worldwide)⁵¹.



Source: World Health Organization (WHO).

5.2. Measures imposed by EU Member States to reduce the spread of COVID-19

Italy was the first European country to be severely impacted by the virus, experiencing an exponential growth in infection rate from mid-February. To avoid capacity constraints and to reduce the pressure on the health sector, countries world-wide have implemented a diverse range of social restrictions and lockdown measures to reduce the spread of the virus and “flatten the curve” of confirmed infections.

In Europe, restrictive measures began with Italian authorities suspending all flights between Italy and China on 31st January. On 22nd February, approximately 50.000 people from 11 different municipalities in northern Italy were quarantined, and work activities and sport events were suspended. On 3rd March the Italian government ordered a full nationwide closure of schools and universities, followed by a complete suspension of all sport activities on 9th March.

Throughout weeks 11 and 12 of 2020, the majority of European countries also began to implement different forms of lockdown measures and restrictions, including *inter alia* travel restrictions, social distancing measures, closure of restaurants and cafes, bars, hotels, schools and non-essential businesses, as well as the postponement or cancellation of public events and organised sporting events. Conversely, Sweden elected not to implement a full lockdown, but instead introduced general social distancing measures, causing many of its citizens to work from home and cut down on travel. On 29th and 31st March Sweden expanded its restrictions, banning gatherings of more than 50 people and visits to nursing homes.

To ensure the availability of goods and essential services, the Commission issued border management guidelines 16th March, setting out “principles for an integrated approach to an effective border management to protect health while preserving the integrity of the Single Market”⁵². Amongst other, the guidelines included principals regarding priority lanes for emergency and freight transport (e.g. via “green lanes”) as well as guidance on health-checks rules of entry for both EU and non-EU nationals at both external and internal borders.

5.3. Impacts of COVID-19 on the seafood supply chain

The closure of hotels, restaurants and catering (HORECA) meant that the effects of COVID-19 were felt immediately by both first sales and the aquaculture sector due to the loss of these outlets for fresh species, which can account for up to 50% of market outlet for fresh fish in some countries such as Italy. In many Member States (MS), fishmongers, markets, and fresh

⁴⁹ <https://eumofa.eu/covid-19>

⁵⁰ <https://www.who.int/emergencies/diseases/novel-coronavirus-2019>

⁵¹ European Centre for Disease Prevention and Control (18.05.2020).

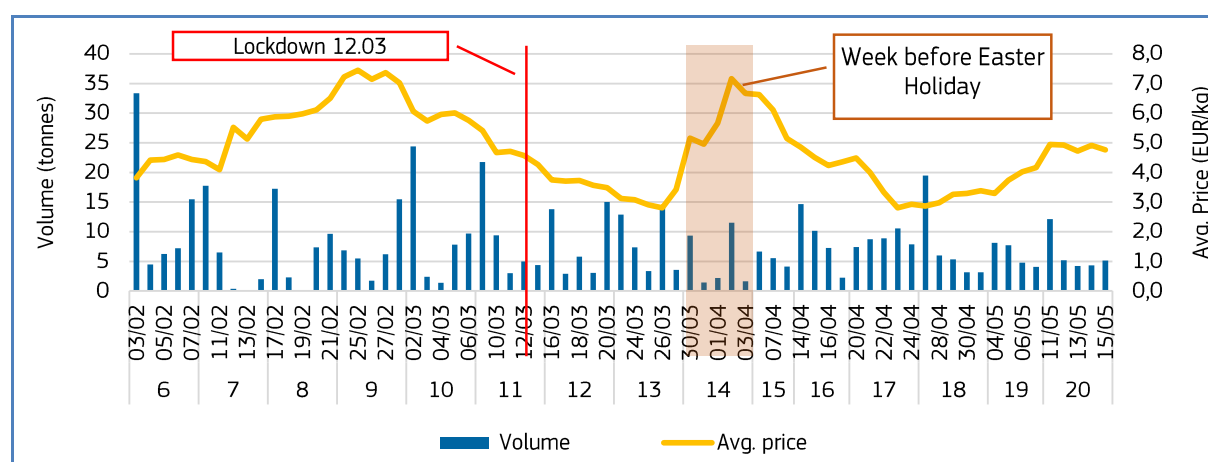
⁵² https://ec.europa.eu/home-affairs/sites/homeaffairs/files/what-we-do/policies/european-agenda-migration/20200316_covid-19-guidelines-for-border-management.pdf

counters in retail stores were also closed, leading to a further substantial drop in demand for fresh seafood. Restrictions on travel were imposed, flights were cancelled, airfreight capacity heavily reduced, and airfreight rates increased. As a result, access to fresh products to foreign markets reduced substantially or disappeared.

First Sales

The sharp drop in demand led to reduced first-sales prices across Europe, although with significant fluctuations and varying trends seen between countries and species. For example, small pelagic fisheries in Northern Europe, which primarily produce frozen goods or species used for fishmeal and fish oil production, the effects of COVID-19 have been negligible. Groundfish and flatfish fisheries have been impacted differently, depending on species and market segment. In general, species primarily sold to HORECA experienced sharp price decreases immediately after the implementation of lockdown measures, with supply, demand, and prices remaining volatile ever since (see the example of daily first-sale volumes and prices of monkfish at five Danish auctions).

Figure 51. **FIRST-SALES VOLUME AND AVERAGE PRICE OF MONKFISH AT FIVE DANISH AUCTIONS**⁵³



Source: <http://www.fiskeauktion.dk>.

Fishing activity

Many fishing fleets in the European Union rely heavily on exports, both intra- and extra-EU. These fleets are highly affected by the reduced demand in Europe and lack of airfreight capacity to distant markets, e.g. the brown crab fishery in Ireland which has almost entirely suspended its operation since the onset of the COVID-19 outbreak. However, in order to adapt to the reduced demand, several POs have organized a rotation of vessels according to expected buyers at auctions. The purpose was to maintain profitable prices and a minimum activity for the auctions. This was the case for example for the French Mediterranean trawling fleet.

Social distancing measures have created difficulties for many fishers. Some, unable to comply with the distancing measures, have been forced to stay in port. Others have been forced to stop fishing as they have been unable to replace their crew due to travel restrictions, and crew replacement remains an issue for the long-distance fishing fleet.

The various lockdown restrictions, together with low demand and falling prices, have led to an overall decrease in fishing activity. The Global Fishing Watch database (based on AIS⁵⁴ data) reports reductions of 50% or more in weekly fishing activity in Italy, France, and Spain, relative to the 2018-2019 average⁵⁵. It is important to note that the AIS data only represent the world's industrial fleet (vessels over 15 metres in the EU) and do not capture the impacts on small-scale fisheries, which account for a large proportion of the European fishing fleet. In reality, small-scale fisheries have been highly impacted as most of their sales are to HORECA and local fish markets.

⁵³ Hanstholm, Hirtshals, Strandby, Grenaa and Skagen.

⁵⁴ Automatic Identification System (AIS). More information available here: <http://www.imo.org/en/OurWork/safety/navigation/pages/ais.aspx>

⁵⁵ <https://globalfishingwatch.org/data-blog/global-fisheries-during-covid-19/>

Table 8. **REDUCTION IN FISHING VESSEL DENSITY BY MARINE STRATEGY FRAMEWORK DIRECTIVE (MSFD) SEA BASIN IN APRIL 2020 OVER APRIL 2019**

Sea basin	Variation %
Adriatic Sea	-40%
Aegean-Levantine Sea	-37%
Arctic Ocean	-6%
Baltic Sea	-10%
Bay of Biscay and Iberian Coast	-14%
Black Sea	75%
Celtic Sea	-24%
Greater North Sea	-14%
Iceland Sea	-16%
Ionian Sea and Central Mediterranean Sea	-37%
Macaronesia	-0,5%
Norwegian Sea	7%
Western Mediterranean Sea	-39%

Source: EMODnet Human Activities, based on data from the European Maritime Safety Agency (EMSA). Note that Sea of Azov, Sea of Jan Mayen and White Sea were not included in the calculation, because low density activity can produce unreliable results.

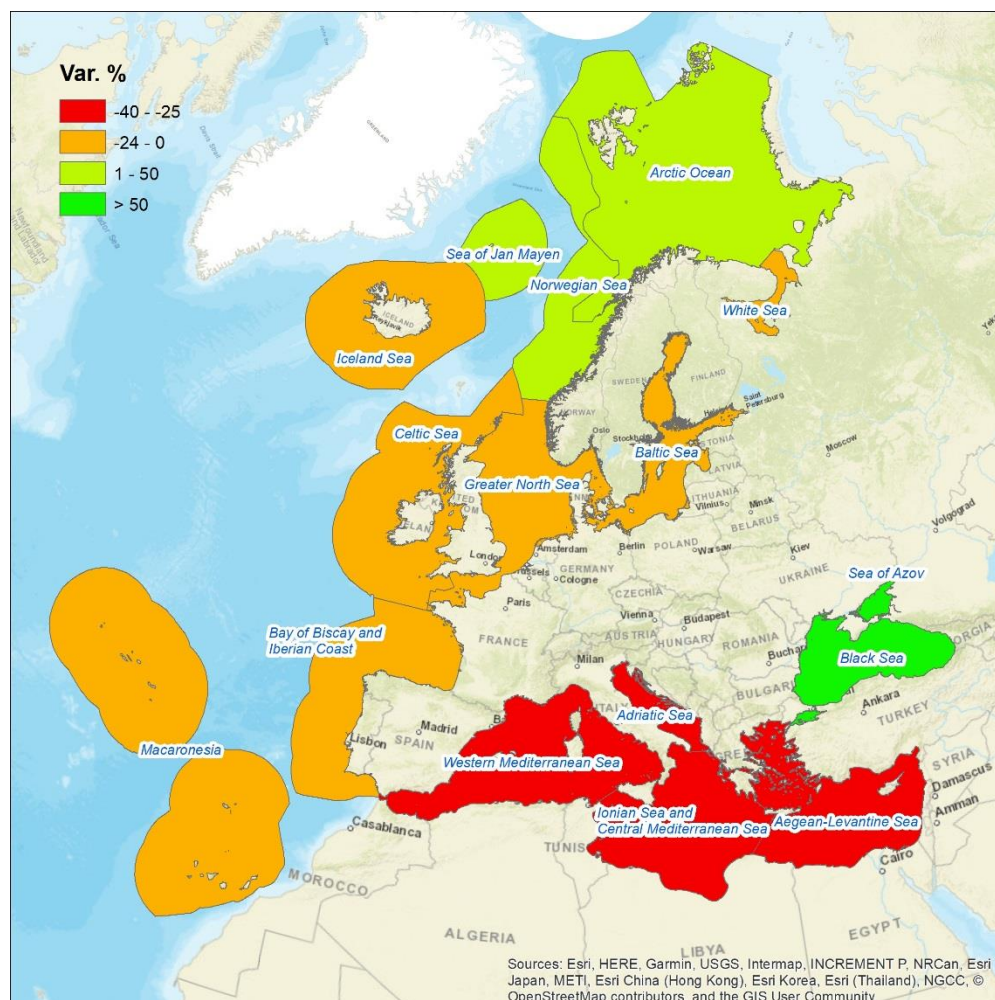
*The increase in the Black Sea is most certainly due to improved data coverage in 2020. Thus, it does not indicate an actual increase in fishing boat density or in fishing activity.

Specific to the EU, EMODnet Human Activities⁵⁶ holds data on vessel route density broken down by ship type. The data reports the number of routes made by certain types of ship per square kilometre each month. By comparing the density of fishing vessel traffic in April 2020 with those of April 2019, average traffic across all EU sea basins was seen to have fallen by 18%. However, there is great variance across sea basins, with the Mediterranean experiencing the most dramatic decrease in traffic density.

Strictly speaking, a reduction in fishing vessel density does not imply an equal reduction in fishing activity. AIS data transmit vessels' positions, regardless of how many vessels are actually fishing. However, assuming that fishers who have stopped fishing do not leave ports, vessel density can be used as a proxy. As with the Global Fishing Watch's data, the small-scale fleet is not included.

⁵⁶ www.emodnet-humanactivities.eu

Figure 52. **MAP OF FISHING VESSEL ACTIVITY, COMPARISON OF VESSEL ACTIVITY BETWEEN APRIL 2020 AND APRIL 2019**



Source: EUMOFA elaboration based on data from EMODnet Human Activities and EMSA.

*The increase in the Black Sea is most certainly due to improved data coverage in 2020. Thus, it does not indicate an actual increase in fishing boat density or in fishing activity.

EU fisheries have also been affected by lockdown and social distancing measures in non-European countries. For example, lockdown measures in Morocco have meant that capacity in the shrimp peeling industry has been heavily reduced, leading the Netherlands and other northern European countries to stop or impose restrictions on shrimp fishing. Even with increased utilisation of mechanical peeling in the Netherlands, large parts of the Dutch shrimp fleet have been moored over the past weeks with support from the EMFF⁵⁷.

Aquaculture

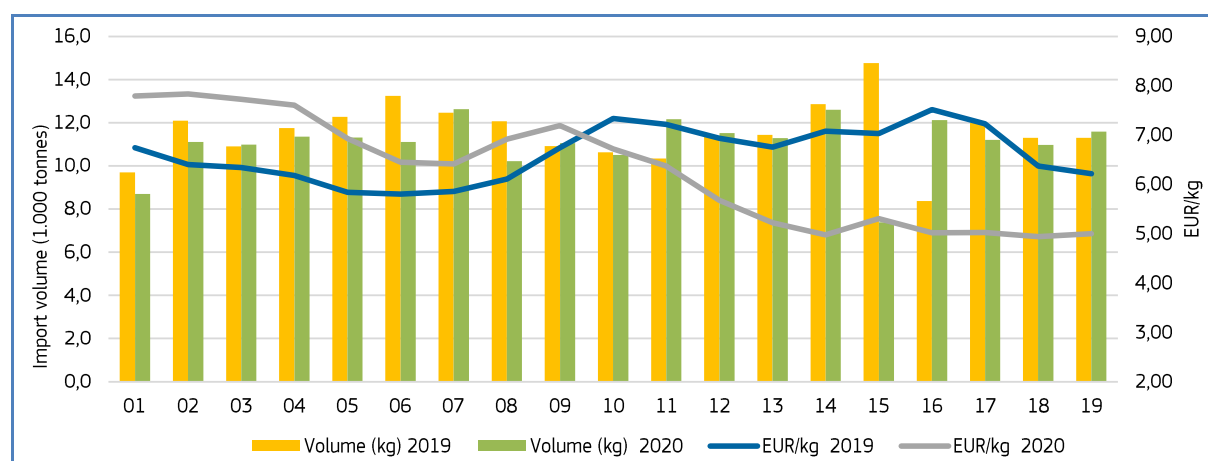
As the primary market for farmed species in Europe is the HORECA sector, most farmed species have been severely impacted by COVID-19 lockdown measures in Member States. In mid-April eel farmers in the Netherlands (the biggest producer of farmed eel in the EU) reported a sales drop of roughly 40% since the beginning of lockdown measures in the EU. A similar decrease was reported for the sea bass and sea bream industry in Greece, with reductions in sales of up to 90% for

⁵⁷ https://ec.europa.eu/fisheries/press/eu-adopts-emergency-aid-fisheries-and-aquaculture_en

producers heavily reliant on the foodservice sector. In Spain and France shellfish aquaculture sectors (mussels and oysters) have reported reductions in sales of up to 80%.

For farmers producing and selling to large-scale retailers there were some exceptions. Generally speaking, salmonid producers have fared better than much of the sector as a high proportion of their production is intended for the retail sector (as smoked or frozen fillets or as fresh whole or portion-packed fillets). Despite this, prices have been lower over recent months relative to the same period of previous years, especially for the larger sized salmon. For fresh whole salmon from Norway to the EU, the total import volume from week 10 to 19 is about the same as last year but the prices decreased by more than 2,00 EUR/kg during weeks 10 through 14 and have remained low. In the UK, the export value of Scottish farmed salmon in Q1 was 34% lower in 2020 compared to the same period in 2019. However, in mid-May, spot prices for Norwegian salmon have increased again to their pre-lockdown level.

Figure 53. **WEEKLY EXTRA-EU IMPORTS OF FRESH WHOLE SALMON FROM NORWAY – WEEK 1 TO 19**



Source: EUMOFA.

The lack of demand represents a challenge for fish farmers with a continuously growing biomass. For a limited time period of approximately two months they can reduce feeding to a minimum, but if the markets do not reopen after this period then the fish must be harvested, frozen, and stored. The steep fall in revenue places increased pressure on farmers' liquidity, and several companies are struggling for survival. To face this challenge, the European Commission reactivated the EMFF support to the storage aid mechanism and extended it to the aquaculture farmers in order to help absorbing the growing biomass. (EMFF support to the storage aid mechanism was terminated end 2018 and was reserved to fisheries POs).

Processing

The European processing industry has also been impacted in diverse ways. Following the introduction of nation-wide lockdowns, increased controls and travel restrictions created long queues at several borders in the EU, causing delays in the transport of goods for processing industries and retail markets. As the supply chain for fisheries and aquaculture products (FAP) in most countries was determined to be vital for overall food supply, solutions were quickly established at MS borders, allowing food transportation to proceed smoothly.

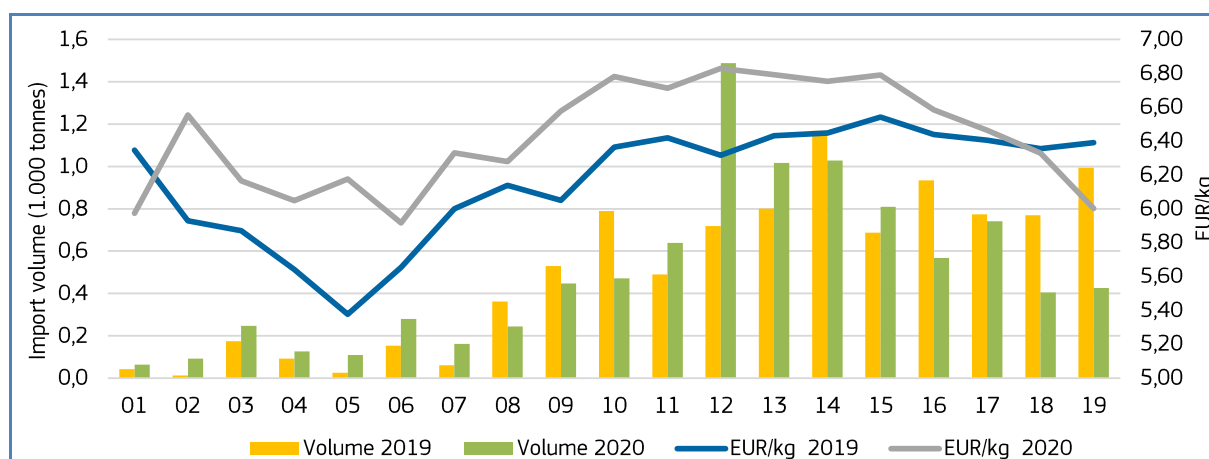
Most processors of smoked and filleted salmon (e.g. in Poland) have been working at full capacity to meet increased retail demand and have experienced few interruptions to the supply of raw materials. Other processors targeting retail markets are also reporting high levels of demand, but have described the situation as fragile. One Italian producer reported an increase of more than 40% in sales of canned tuna because of COVID-19. In contrast, processors primarily targeting HORECA have lost most of their market outlets. In France, the shrimp cooking sector, which is dependent on the foodservice sector, has estimated a loss in turnover of around 70% due to COVID-19.

Most processing facilities have been forced to make changes to their operations to comply with social distancing measures, for example: by reducing or dividing the workforce across several shifts. Some processors have reported a reduction in capacity of 20- 40% due to these changes, while others experiencing high demand have extended their working hours, operating across shift patterns from early morning to late night.

Wholesale and consumption

Upon the announcement of lockdown measures, a first response for many consumers was to stock-pile food. There was a substantial increase in retail sales of durable and pre-packed seafood products (frozen, smoked, canned, salted, and dried). As the first “wave of panic” settled, fresh pre-packed or portioned products were also in high demand. Over the following weeks, European processors with existing retail contracts experienced high demand and worked at full capacity as retailers re-stocked and EU imports of these products increased (e.g. Portuguese imports of salted cod from Norway). Processors usually supplying the HORECA sector, however, struggled to find market outlets.

Figure 54. **WEEKLY EXTRA-EU IMPORTS OF SALTED COD FROM NORWAY – WEEK 1 TO 19**

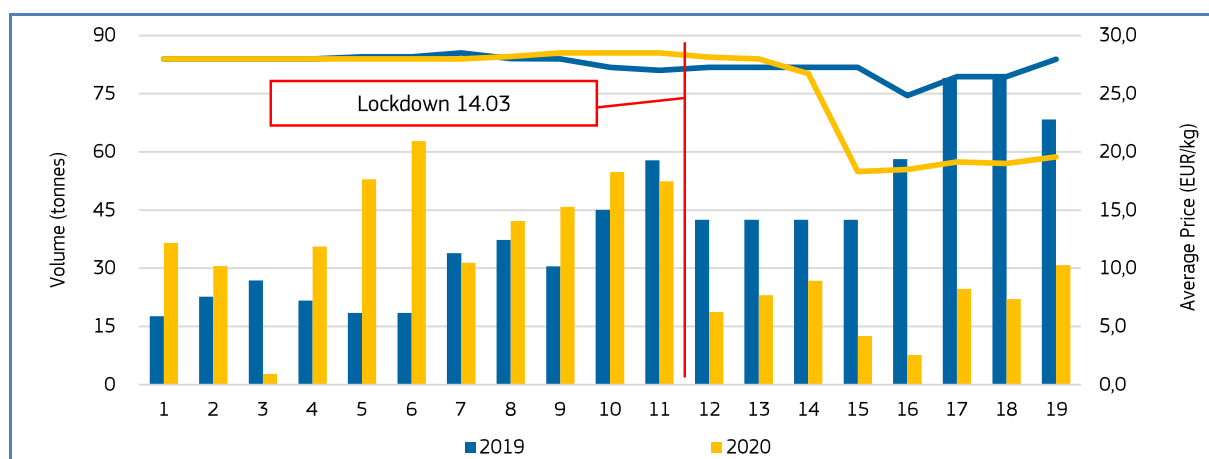


Source: EUMOFA.

According to weekly trade data from the Norway Seafood Council, 87% of salted cod exported from Norway to the EU in the last 10-week period was directed to the Portuguese market⁵⁸.

Wholesale markets have experienced impacts similar to those of the rest of the supply chain. Decline in demand for fresh products has had negative effects on price, whereas the demand for frozen and other durable products has remained stable or increased. As an example, reports weekly sales volume and price of fresh bluefin tuna at Mercamadrid. During the 8 weeks following the introduction of lockdown in Spain (weeks 12-19), sales volume decreased by 56% compared to the 8 weeks prior. Over the same period, the average price decreased by more than 21%.

Figure 55. **WEEKLY VOLUME AND AVERAGE PRICE OF FRESH BLUEFIN TUNA AT MERCAMADRID**



Source: Mercamadrid.

In the absence of access to restaurants there are clear indications of increased at-home consumption of seafood. Based on consumer panel data from Kantar, during weeks 9-12 of 2020 at-home consumption of salmon in Spain increased by 12%

⁵⁸ <https://seafood.no/markedsinnsikt/apne-rapporter/Ukesstatistikk/>

in volume and 21% in value. During the same period in France, at-home consumption volumes of salmon and frozen cod fillets increased by 21% and 49% respectively, while that of seafood in general increased by 11%. In the UK, at-home consumption of seafood has increased by 20% in terms of both volume and value.

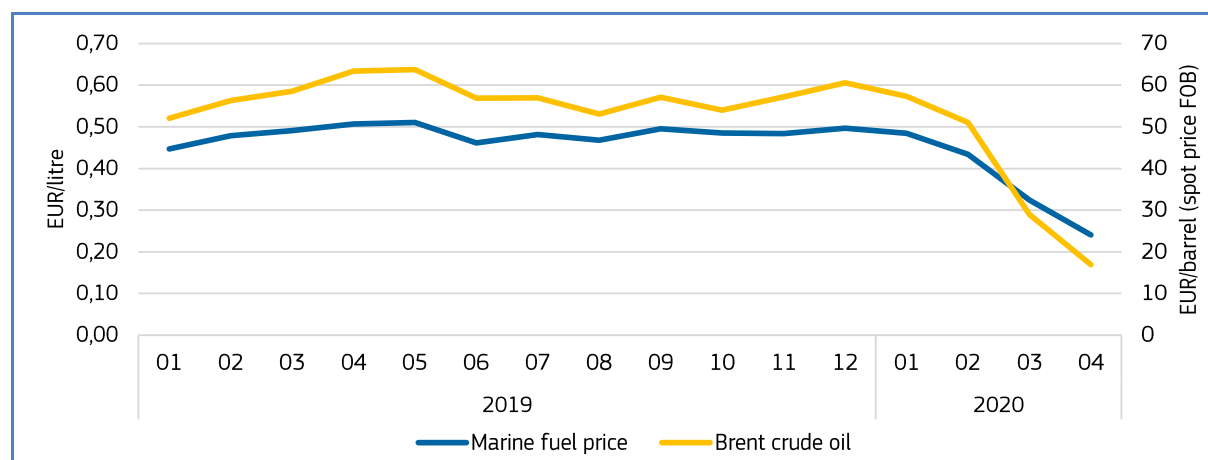
Adapting to the restraints of lockdowns, Europe has seen a large increase in e-commerce over the past months. Retailers with existing online shops and home delivery logistics quickly experienced capacity restraints as the demand for online shopping and home delivery increased sharply. With the loss of HORECA, both fishers and wholesalers have also found new ways of selling their products, including direct sales to customers through online stores and home delivery, often in combination with marketing campaigns to eat local products. COVID-19 has arguably forced many traditional sales outlets to think differently and embrace new technologies, while consumers forced to stay at home have had to try new ways of shopping.

Transportation and logistics

Many passenger flights were cancelled due to restrictions on international travel. Since a large portion of airfreight relies on belly freight, the capacity was heavily reduced and airfreight rates increased. According to the latest TAC index, from February to April this year the monthly airfreight rates increased 96% and 108% on the routes “Hong Kong-Europe” and “Frankfurt-North America” respectively⁵⁹. This increase is only caused by reduced capacity as the jet fuel prices decreased by around 60% over the same period⁶⁰.

Marine fuel prices have also experienced a sharp decrease over the past months. The average marine fuel price in the EU in March and April decreased 43% compared to the same months in 2019. Both the decrease of jet fuel and marine fuel prices was caused by decreasing oil prices. The spot price for Brent crude oil decreased by 62% year-over-year in March and April.

Figure 56. **AVERAGE EU MARINE FUEL PRICES AND BRENT CRUDE OIL PRICES (spot price FOB)**



Source: EUMOFA (marine fuel prices) and U.S. Energy Information Administration (oil prices).

5.4. Markets

The European processing sector relying on imported raw material from non-European countries has for the most part not experienced supply shortages in recent months, due to the fact that most products were imported frozen before lockdown measures came into effect. Although lockdown measures in Ecuador from mid-March have resulted in some supply shortage of tuna for the Spanish canning industry, as the virus spreads and impacts the producing regions that supply the EU over the coming months, larger market impacts may become evident.

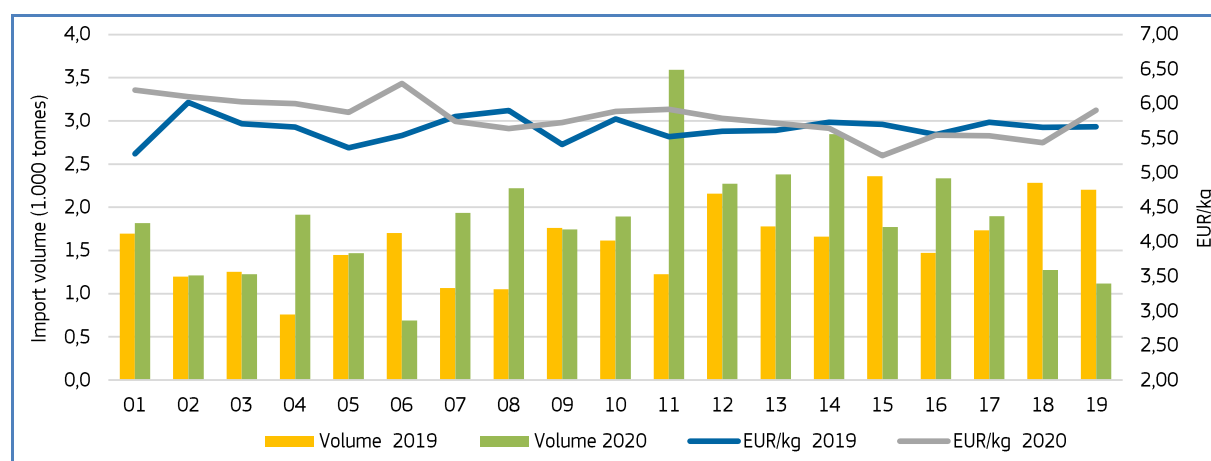
⁵⁹ <https://www.aircargonews.net/data-hub/airfreight-rates-tac-index/>.

⁶⁰ Platts' jet fuel price index, <https://www.iata.org/en/publications/economics/fuel-monitor/>.

Ecuador, India, and Vietnam are the primary suppliers of warm water shrimp to the EU and, like many EU countries, these countries are or have been under lockdown. This has had an impact on both their processing and trade sectors. Together with closed markets in Europe and North America, this loss in demand has had a negative effect on the prices paid to shrimp farmers over the past few months. In Ecuador, farm gate prices fell below the farmers costs for a number of weeks. This has led to reduced stocking (the scope of which is currently undetermined) which could indicate possible supply shortages later in the year.

From week 10 to 19, EU imports of frozen warmwater shrimp from Ecuador increased by 15% in terms of volume compared to the same period last year, however with a decreasing trend from week 16 to 19. The prices on the other hand were stable at around the same level as in 2019.

Figure 57. **WEEKLY EXTRA-EU IMPORTS OF FROZEN WARMWATER SHRIMP FROM ECUADOR – WEEK 1 TO 19**

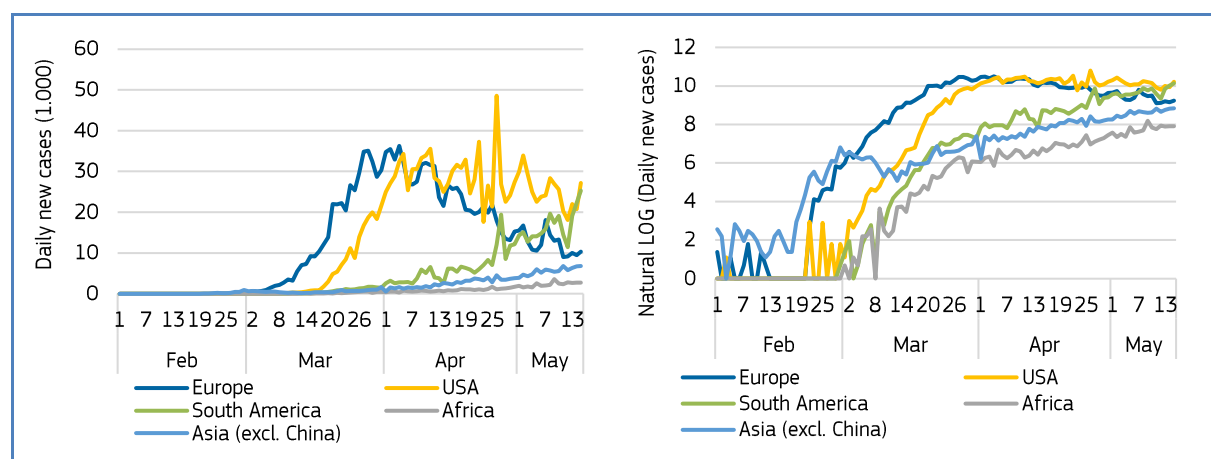


Source: EUMOFA

Non-EU countries in Africa, Asia, and South America also represent important export markets for some EU Member States. The latest data from the European Centre for Disease Prevention and Control indicates that the number of new cases is increasing in all these regions. If the trend continues, and similar lockdowns are introduced in important export markets, the effects on extra-EU exports could continue for several months.

The daily number of new reported cases in Europe, the USA, South America, Africa, and Asia (excluding China) is reported in the left-hand graph. Exponential increases in new cases occurred in the middle of March in Europe, and in late March/early April in the USA. The other three regions show drastically lower numbers in absolute terms. However, the graph on the right-hand side allows the rate of change to be examined more closely. Whereas the US curve has flattened, and the European curve shows a downward trend from the beginning of April, the curves for South America, Africa, and Asia (excluding China) were still trending upwards as of mid-May.

Figure 58. **CASES OF COVID-19 BY REGION FROM 1ST FEBRUARY TO 13TH MAY, DAILY NUMBER OF CASES IN 1.000 (ON THE LEFT) AND NATURAL LOG–DAILY NUMBER OF CASES (ON THE RIGHT)**



Source: European Centre for Disease Prevention and Control (18.05.2020).

On 13th May the European Commission presented guidelines and recommendations intended to help Member States gradually lift travel restrictions and allow tourism businesses to reopen while respecting necessary health precautions⁶¹. Some Member States have already communicated plans for a soft opening, including, among others, some restaurants and outdoor cafés. According to industry reports, this has initiated a degree of cautious optimism in the supply chain, which is also indicated by recent price increases at first-sales level in some MS (e.g. Denmark and the Netherlands).

Nevertheless, when markets reopen, prices may remain low due to the possibility of oversupply from frozen stocks from the fishery, aquaculture, and processing sectors. From aquaculture, the supply of large fish and shellfish is also likely to be higher than usual, meaning that prices for these products will remain relatively low.

⁶¹ https://ec.europa.eu/commission/presscorner/detail/en/ip_20_854

6. Global highlights

EU / Measure / COVID-19: DG MARE has published an information bulletin to give guidance to EU Member States. Fisheries and aquaculture have been hit particularly hard by significant market disruptions caused by the Coronavirus. The bulletin outlines existing tools and provides details of support measures available to Member States during the crisis. There are options under the current rules of the European Maritime and Fisheries Fund, and the newly adopted Temporary Framework for State aid. The framework, adopted on 19 March 2020, allows Member States to support fishers and aquaculture producers impacted by the crisis through the provision of aid (up to a value of EUR 120.000 per undertaking) through direct grants, repayable advances or tax advantages⁶².



EU / EMFF / COVID-19: The European Parliament has adapted the European Commission initiative to modify the European Maritime and Fisheries Fund (EMFF) to help mitigate the impacts the coronavirus will have on the fisheries and aquaculture sectors. As part of the Coronavirus Response Investment Initiative Plus these measures include support for the temporary cessation of fishing activities due to coronavirus, financial compensations to aquaculture farmers and processing enterprises, specific measures for remote regions, and support to producer organisations for the storage of products. Operations supported under the temporary coronavirus-related measures will be retroactively eligible as of 1st February 2020 until 31st December 2020⁶³.

FAO / Industry / COVID-19: GLOBEFISH, a project within the FAO Fisheries and Aquaculture Department, published a policy brief on the challenges caused by COVID-19 and has proposed measures to protect production and income, to maintain operations, and support the supply chain. The full range of activities required to deliver fish and fish products from production to the final consumer is subject to indirect impacts of the pandemic through new sanitary measures, changing consumer demands, market access and logistical problems related to transportation and border restrictions.⁶⁴

FAO / Seafood / Trade / COVID-19: Due to the COVID-19 outbreak, the seafood sector is facing low levels of demand (both present and foreseen), as well as an array of supply challenges. With the effective shutdown of HoReCa, food service demand has evaporated, while retail sales have been marked by extreme volatility as periods of panic buying are followed by sustained lulls. Overall demand for fisheries and aquaculture products has fallen sharply, with prices experiencing corresponding decreases for a number of species, particularly those primarily used in hospitality services. Meanwhile, suppliers and processors are struggling with business closures throughout the supply chain, together with other logistical difficulties⁶⁵.

Industry / Women / COVID-19: The International Organisation for Women in the Seafood Industry (WSI) warns that female participants in the aquaculture and fisheries sectors are likely to be hit harder by the negative impacts of the COVID-19 pandemic than their male counterparts. The coronavirus outbreak will likely threaten progress made in empowering women and will deepen gender inequities already pervasive in the sector⁶⁶.

The Faroe Islands / Aquaculture / COVID-19: Scientists from the Food, Veterinary, and Environmental Agency (HFS) of the Faroe Islands were successful in helping to halt the spread of COVID-19 in the archipelago by adapting tests for Infectious Salmon Anaemia Virus (ISAV), which is fatal to Atlantic salmon, for human use. Most of the techniques used to develop ISAV were found to be directly transferrable for corona test purposes, allowing the country to test more than 10% of its population in a short time (600 tests per day)⁶⁷.

⁶² https://ec.europa.eu/fisheries/press/coronavirus-european-commission-helps-member-states-support-local-fishing-and-aquaculture_en

⁶³ https://ec.europa.eu/fisheries/press/eu-adopts-emergency-aid-fisheries-and-aquaculture_en

⁶⁴ <http://www.fao.org/3/ca8637en/CA8637EN.pdf>

⁶⁵ <http://www.fao.org/in-action/globefish/news-events/details-news/en/c/1268337/>

⁶⁶ <https://thefishsite.com/articles/women-set-to-bear-the-brunt-of-the-covid-19-pandemic>

⁶⁷ <https://kvf.fo/greinar/2020/03/25/fish-disease-root-successful-corona-testing>

7. Macroeconomic Context

7.1. Marine fuel

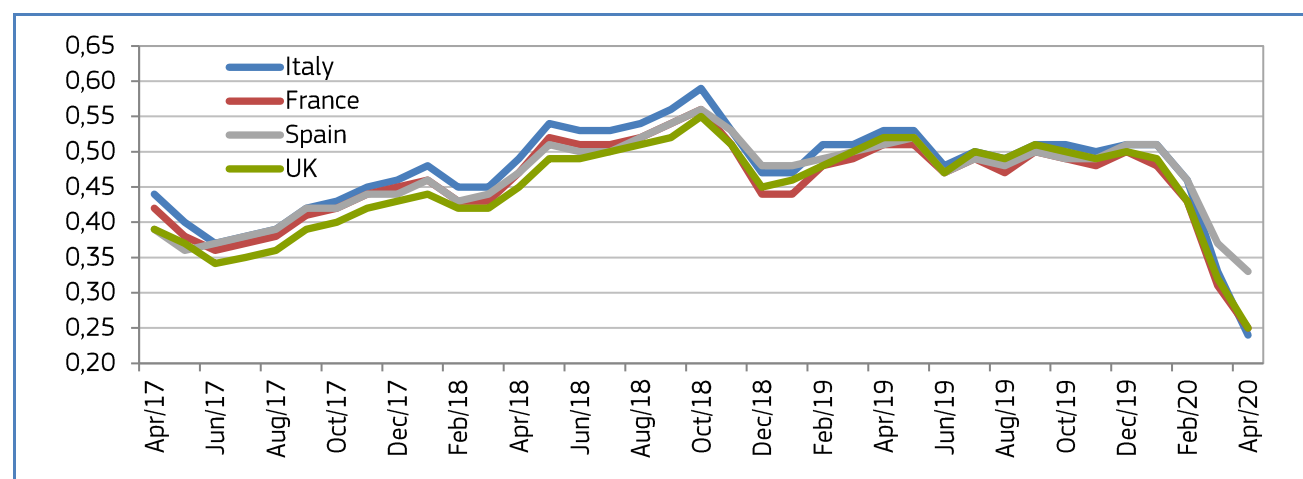
Average prices for marine fuel in **April 2020** ranged between 0,25 and 0,33 EUR/litre in ports in **France, Italy, Spain**, and the **UK**. Prices dropped about 20% compared with the previous month and 49% compared with the same month in 2019.

Table 9. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Apr 2020	Change from Mar 2020	Change from Apr 2019
France (ports of Lorient and Boulogne)	0,25	-19%	-51%
Italy (ports of Ancona and Livorno)	0,24	-27%	-55%
Spain (ports of A Coruña and Vigo)	0,33	-11%	-35%
The UK (ports of Grimsby and Aberdeen)	0,25	-22%	-52%

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

Figure 59. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**



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

7.2. Consumer prices

The EU annual inflation rate was at 1,2% in March 2020, down from 1,6% in February. A year earlier, it was 1,6%.

Inflation: lowest rates in March 2020, compared with February 2020.



Inflation: highest rates in March 2020, compared with February 2020.

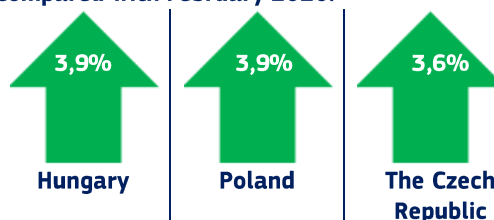


Table 10. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

HICP	Mar 2018	Mar 2019	Feb 2020	Mar 2020	Change from Feb 2020		Change from Mar 2019	
Food and non-alcoholic beverages	104,19	106,13	109,07	109,44	↑	0,3%	↑	3,1%
Fish and seafood	108,03	110,12	112,38	113,22	↑	0,7%	↑	2,8%

Source: Eurostat.

7.3. Exchange rates

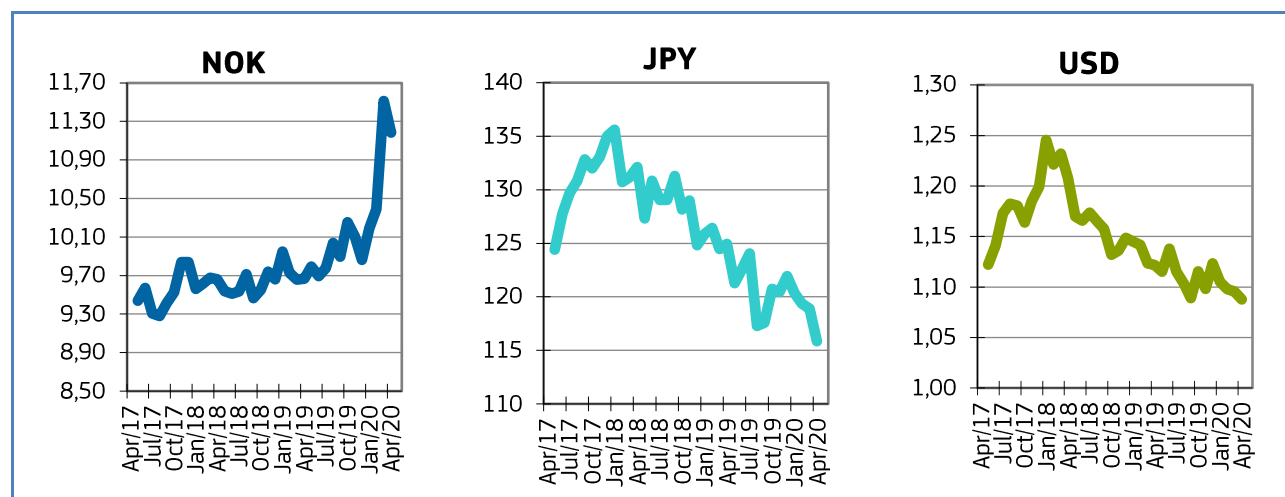
Table 11. **EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Apr 2018	Apr 2019	Mar 2020	Apr 2020
NOK	9,6620	9,6678	11,5100	11,1840
JPY	132,12	124,93	118,90	115,87
USD	1,2079	1,1235	1,0956	1,0876

Source: European Central Bank.

In April 2020, the euro depreciated against the Norwegian krone (-2,8%), Japanese yen (-2,5%), and the US dollar (-0,7%). For the past six months, the euro has fluctuated around 1,10 against the US dollar. Compared with April 2019, the euro has depreciated 7,3% against the Japanese yen and 3,0% against the US dollar, but it appreciated 15,7% against the Norwegian krone.

Figure 60. **TREND OF EURO EXCHANGE RATES**



Source: European Central Bank.

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First sales: The Council of European Union, DG-Mare European Commission, FAO, ICES, IUCN, fisk.fo.

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Case studies: DG AGRI, European Parliament, EU Council, Hartmann M., eAmbrosia database, The National Institute for origin and quality, France (INAO), Eurostat, AND-I, Barjolle and Sylvander, L. Gauvrit and B. Schaer, Ministry of Agriculture, Fisheries and Food, Spain (MAPA), V. Amilien, G.Vittersø, and T. Tangeland, WHO, European Center for Disease Prevention and Control, Fiskeauktion Denmark, Global Fishing Watch, EMODnet Human Activities, EMSA, European Commission, Mercamadrid, Norwegian Seafood Council, U.S. Energy Information Administration, Aircargo news, IATA.

Global highlights: DG-Mare European Commission, FAO, fishsite.com, kvf.fo

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

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

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

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

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

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

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

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