European Commission

Monthly Highlights

No. 7 / 2020

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

In this issue

Over the 36-month period from May 2017 to April 2020, the average first-sales price of European eel in Italy was 10,63 EUR/kg, 16% higher than the average price in Sweden (8,94 EUR/kg). In Spain, the average price of European (glass) eel was 237,90 EUR/kg. The average first-sales price of round goby in Estonia was 0,28 EUR/kg, 45% higher than in Latvia (0,20 EUR/kg).

The import price of prepared/preserved anchovies from Morocco in the EU was 8,31 EUR/kg in the last week of May, 6% lower than the same week of 2019. Between 2017 and 2020, it has remained relatively stable, while volume decreased moderately.

Over the past three years, German households spent an average of 7,12 EUR/kg for a kilogram of fresh mussels (*Mytilus* spp.), almost 50% more than that spent by households in the Netherlands.

In 2019, imports of Alaska pollock to the EU reached an all-time-high. The EU imported 305.000 tonnes of Alaska pollock with a total value of EUR 840 million, mainly from China, the USA, and Russia.

In 2018, Korean aquaculture production reached around 2,28 million tonnes, mostly from marine aquaculture. Seaweed accounted for three quarters of the total production volume: mostly Japanese kelp, nori and wakame.

The European Commission has increased the European Maritime and Fisheries Fund (EMFF) by EUR 500 million. The additional funding is part of the Recovery Package and supports existing EU support measures to alleviate the immediate socio-economic impacts caused by COVID-19 on the fisheries sector.

Weekly analyses of the impacts of the COVID-19 crisis conducted by EUMOFA so far can be accessed here.

Contents

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1. First sales in Europe

During **January–April 2020**, 13 EU Member States (MS), Norway, and the United Kingdom reported first-sales data for 10 commodity groups[1]. 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 volume grew in Lithuania, Norway, and the UK, while increases in value were only seen in Belgium and Greece. In Lithuania, value remained unchanged. An increased supply of herring and sprat was the main factor leading to the volume increase in Lithuania. Higher value of pouting and megrim contributed to the overall value increase in Belgium.

Decreases in value and volume: First-sales value and volume declined in Denmark, Estonia, France, Italy, Latvia, the Netherlands, Poland, Portugal, Spain, and Sweden. The drops seen in Denmark and Sweden were primarily caused by reduced supplies of cod. In Estonia, the decrease was mainly due to a decline in herring supply.

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

	January – April 2018		January – April 2019		January – April 2020		Change since January – April 2019	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Belgium	5.484	22,90	4.609	19,43	4.304	20,20	-7%	4%
Denmark	68.510	99,98	71.845	93,68	46.486	68,89	-35%	-26%
Estonia	22.733	4,83	28.761	5,75	20.674	5,56	-28%	-3%
France	61.165	212,88	61.619	205,94	48.504	162,05	-21%	-21%
Greece	5.892	13,50	6.487	15,43	6.451	15,51	-1%	1%
Italy**	22.894	89,94	24.141	100,47	20.047	80,00	-17%	-20%
Latvia	19.752	3,67	22.558	3,80	18.200	3,64	-19%	-4%
Lithuania	793	0,67	519	0,44	957	0,44	84%	0%
Netherlands	123.959	174,13	90.023	133,92	80.628	114,43	-10%	-15%
Norway	1.451.365	1.058,68	1.041.806	871,39	1.070.996	861,20	3%	-1%
Poland	53.303	15,42	53.492	13,38	46.447	10,71	-13%	-20%
Portugal	18.685	51,18	24.102	62,28	18.617	60,69	-23%	-3%
Spain	141.045	399,92	150.507	443,66	149.645	392,53	-1%	-12%
Sweden	106.143	36,45	95.534	34,30	58.686	25,22	-39%	-26%
UK	84.672	139,92	91.510	191,25	97.989	159,03	7%	-17%

Source: EUMOFA (updated 15.06.2020). 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, freshwater fish, tuna and tuna-like species, and other marine fish.

1.2. In April 2020 compared with previous years

Increases in value and volume: Of the reporting countries only Lithuania experienced increases in first sales owing to an increase in the supply of herring.

Decreases in value and volume: COVID-19 outbreak was behind first-sales decline in Belgium, Denmark, Estonia, France, Greece, Italy, Latvia, the Netherlands, Norway, Poland, Portugal, Spain, Sweden, and the UK. In Italy, the decrease was primarily caused by a decline in the supply of clam and miscellaneous shrimps[2]. In France, first sales decreased mainly due to a reduced supply of common sole and monk.

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

	April 2018		April 2019		April 2020		Change since April 2019	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Belgium	1.219	5,55	1.068	4,99	963	3,99	-10%	-20%
Denmark	13.567	25,76	13.202	23,24	7.975	12,87	-40%	-45%
Estonia	6.588	1,66	10.557	2,38	5.606	1,55	-47%	-35%
France	15.282	51,13	15.422	51,74	9.760	30,88	-37%	-40%
Greece	2.093	4,09	2.008	4,52	1.580	3,53	-21%	-22%
Italy**	7.212	26,11	8.139	31,64	4.924	18,93	-40%	-40%
Latvia	4.834	0,94	6.506	1,07	4.821	1,03	-26%	-4%
Lithuania	141	0,07	178	0,08	309	0,09	74%	13%
Netherlands	39.564	52,50	39.519	48,57	26.384	32,60	-33%	-33%
Norway	368.808	239,34	244.360	213,74	299.627	186,80	23%	-13%
Poland	10.840	3,24	14.384	3,58	7.080	1,48	-51%	-59%
Portugal	4.771	13,33	5.033	14,36	4.611	13,00	-8%	-9%
Spain	49.313	127,55	48.004	134,95	39.175	92,74	-18%	-31%
Sweden	16.635	5,79	17.145	7,20	16.967	7,13	-1%	-1%
UK	15.081	35,01	18.573	42,57	11.877	18,45	-36%	-57%

Source: EUMOFA (updated 15.06.2020). 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 29 of 2020)** are available via the EUMOFA website, and can be accessed **here**.

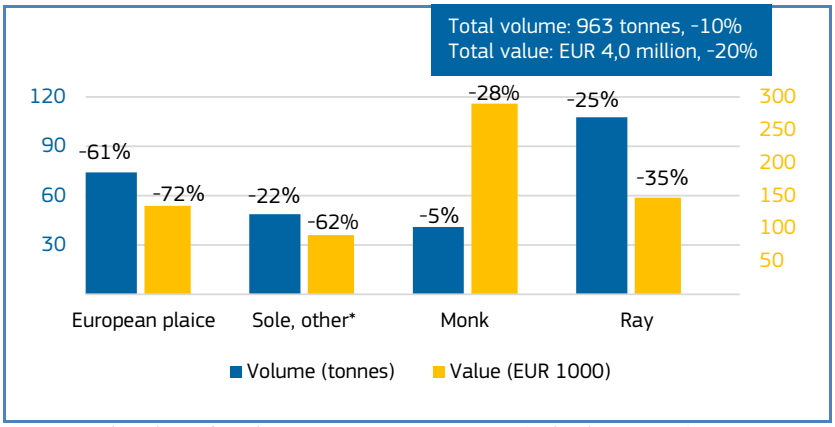
The most recent first-sales data **for May 2020** are available via the EUMOFA website, and can be accessed **here**.

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

1.3. First sales in selected countries

In **Belgium**, in **January–April 2020**, first-sales value increased by 4% due to common sole. Volume fell by 7% relative to the same period of the previous year, largely driven by decreases in European plaice. In **April 2020**, European plaice, other sole* (other than common sole), monk, and ray were the main species responsible for decreases in both value and volume relative to April 2019. European plaice recorded the highest first sales decreases due to changes in fishery strategies following the Covid-19 crisis. Namely, due to lack of market opportunities and low prices fleet started to target the more valuable species such as sole, while the Covid-19 pandemic caused the closure of the main distribution channels, especially the Ho.Re.Ca sector.

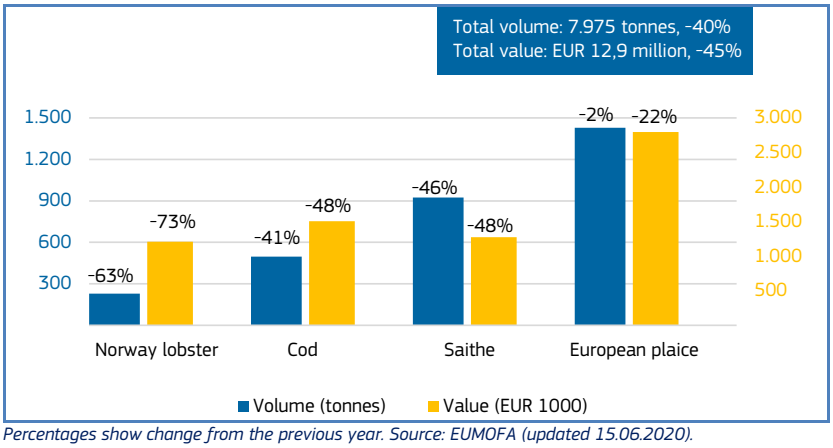
Figure 1. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM, APRIL 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).
*.*EUMOFA aggregation for species (Metadata 2, Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies).*

In **Denmark**, in **January–April 2020**, first-sales decreased by 26% in value (mainly due to cod and Norway lobster) and decreased by 35% in volume (due to herring) compared to January–April 2019. In **April 2020**, first sales decreased in both value and volume relative to April 2019. Norway lobster, cod, saithe and European plaice were the primary species responsible for the decline. Among these species, the average price of Norway lobster saw the sharpest decline (by 28%), reaching 5,26 EUR/kg.

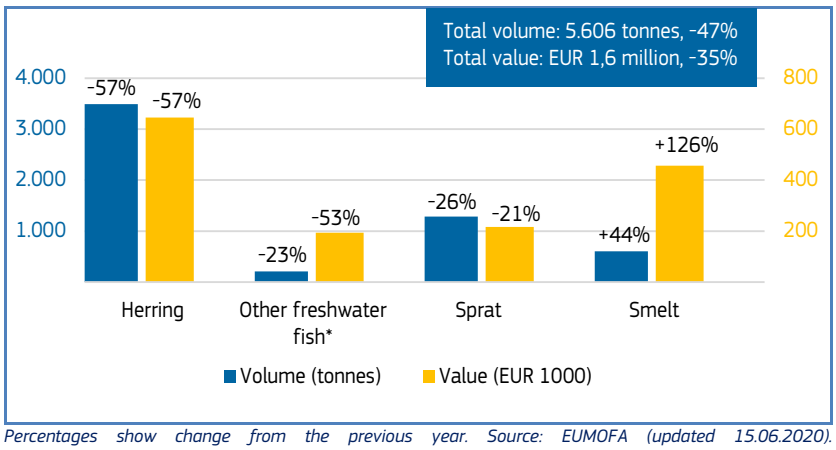
Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, APRIL 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).

In **January–April 2020**, **Estonia** saw decreases in first-sales value (-3%) and volume (-28%) which were primarily cause by reduced supplies of herring relative to January–April 2019. In **April 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 lower supplies of herring, sprat, and other freshwater fish*. An increase in first-sales value and volume of smelt offset the predominately downward trend.

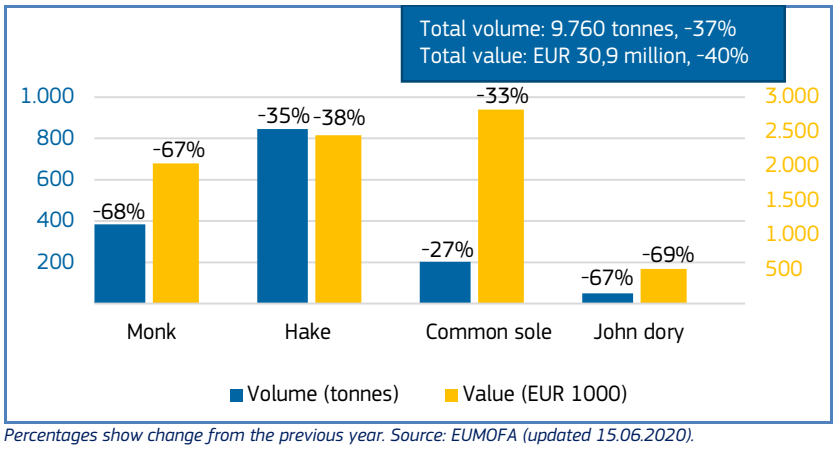
Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, APRIL 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).
** EUMOFA aggregation for species (Metadata 2, Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies).*

In **France**, in **January–April 2020**, first sales decreased by 21% in both value and volume compared to January–April 2019. The fall in value was caused by a decrease in the supply of squid, while volume fell due to primarily reduced supplies of hake. In **April 2020**, first-sales decreased in value and volume relative to April 2019. The main contributing species include monk, hake, common sole and John dory. Of other key species, cuttlefish registered a 31% decrease in average price, reaching 2,73 EUR/kg.

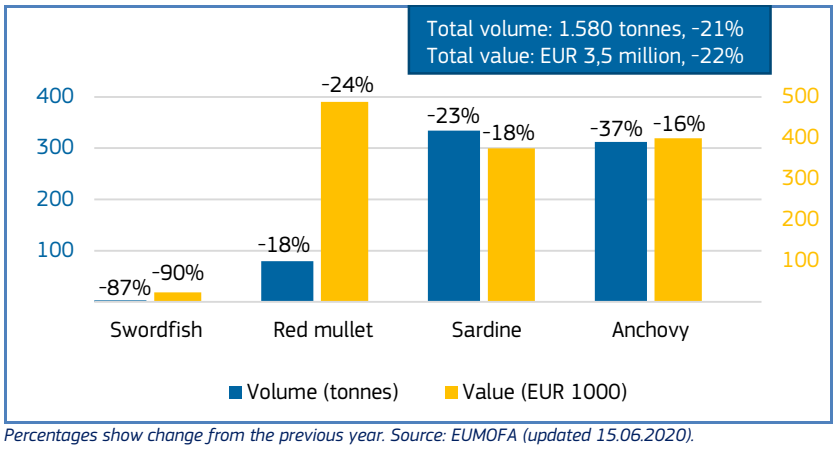
Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, APRIL 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).

In **Greece**, in **January–April 2020**, first-sales value rose by 1% due to increased supplies of hake and octopus relative to the same period in 2019. First-sales volume decreased by 1% due to anchovy. However, in **April 2020**, first-sales value and volume were lower than in April 2019. This downward trend was driven by swordfish, red mullet, sardine, and anchovy. Of these species, anchovy recorded the highest increase in average price, reaching 1,28 EUR/kg (+33%).

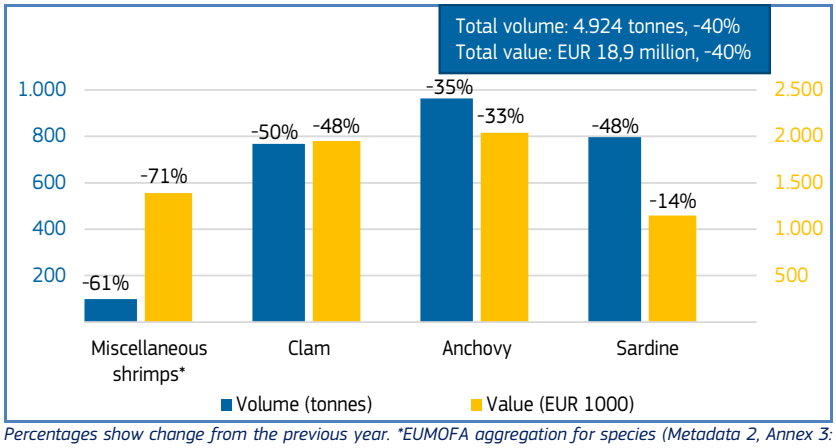
Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GREECE, APRIL 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).

In **Italy** in **January–April 2020**, first sales fell by 20% in value and 17% in volume relative to the same period in 2019. Decreases in value of miscellaneous shrimps* and anchovy, as well as reduced volumes of sardine, were the main drivers behind the downward trend. In **April 2020**, first sales decreased in value and volume relative to April 2019, driven primarily by decreases in first sales of miscellaneous shrimps, clam, anchovy, and sardine.

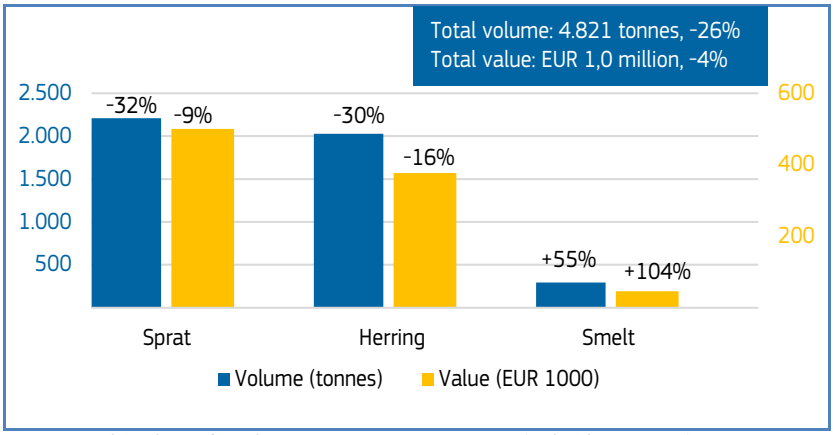
Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, APRIL 2020**



*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 15.06.2020).*

In **Latvia**, in **January–April 2020**, sprat and herring were the key species responsible for decreases in first-sales value (-4%) and volume (-19%) relative to January–April 2019. In **April 2020**, first-sales value and volume continued to decline due to sprat and herring. Smelt was one of a few species that recorded increase in first sales. The average price of sprat increased by 33% to 0,23 EUR/kg, due to reduced supply and stable market demand. A combination of transport restrictions (caused by Covid-19) and declined interest for other species, together with good weather conditions, stock availability and a stable demand on the market led to first-sales increase for smelt.

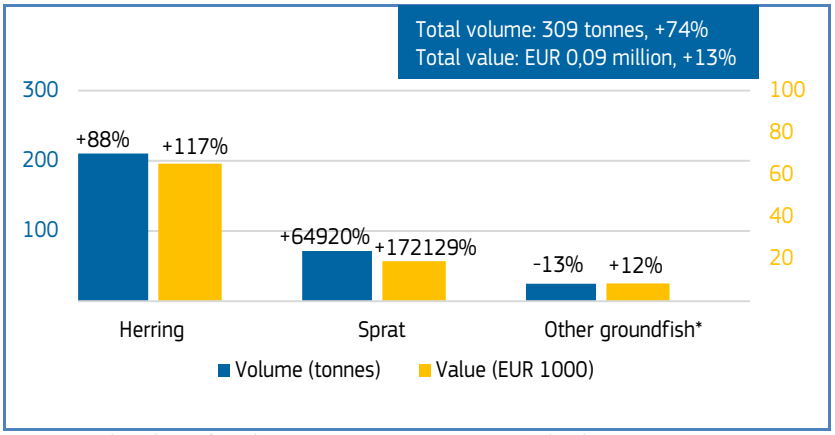
Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, APRIL 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).

In **Lithuania** in **January–April 2020**, first-sales value remained stable, while volume increased by 84% (due to an increased supply of sprat and herring relative to the same period in 2019). In **April 2020**, first-sales value and volume increased due to herring, sprat and other groundfish species* compared to April 2019. The high increase in sprat first sales may be due to the sharp fall in sprat supply recorded between April 2019 (110 kg) and April 2020 (71,522 kg). Also, herring and sprat recorded high increases in sales due to changes in transportation, as Latvian and Estonian processing companies purchased subsidiary fish companies in Lithuania.

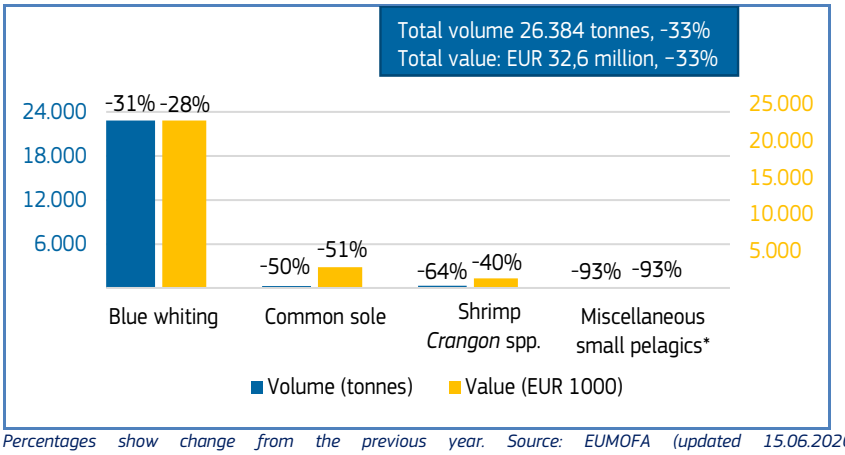
Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, APRIL 2020**



*Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020). *EUMOFA aggregation for species (Metadata 2, Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies).*

In the **Netherlands**, in **January–April 2020**, first sales decreased by 15% in value and 10% in volume compared to the same period in 2019. In **April 2020**, first sales exhibited downward trends, with both value and volume falling by 33% relative to April 2019. This was mainly due to blue whiting, common sole, shrimp *Crangon* spp. and miscellaneous small pelagics*. Shrimp *Crangon* spp. recorded the highest price increase (+66%), reaching 4,41 EUR/kg.

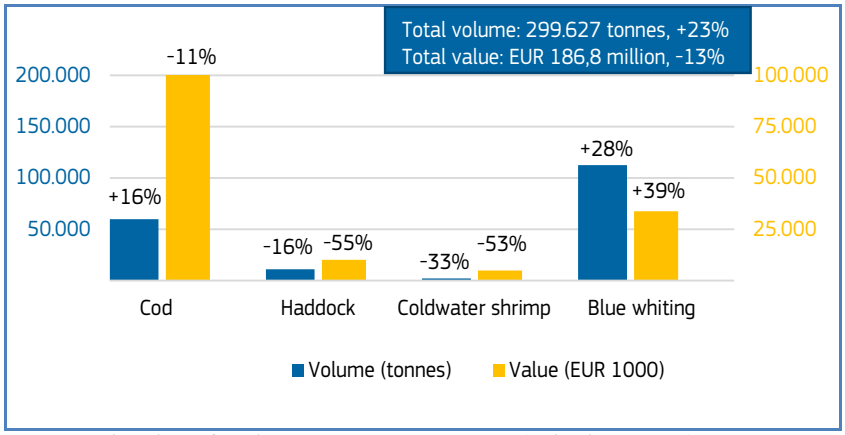
Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, APRIL 2020**



*Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020). *EUMOFA aggregation for species (Metadata 2, Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies).*

In **Norway** in **January–April 2020**, first–sales value decreased by 1% while volume increased by 3% compared to January–April 2019. In **April 2020**, first-sales value decreased relative to the same month in 2019. This was caused by cod, haddock and coldwater shrimp, while the overall first-sales volume increased due to blue whiting. Of these species, haddock exhibited the most significant decrease in average price (-46%), falling to 0,92 EUR/kg.

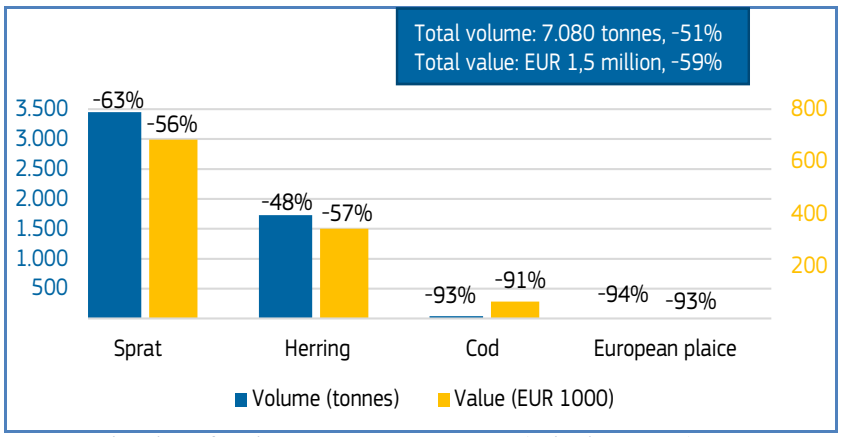
Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, APRIL 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).

In **Poland** in **January–April 2020**, first sales decreased by 20% in value and 13% of volume relative to the same period of 2019. This was caused by reduced sales of cod, sprat, and European plaice. In **April 2020**, first-sales value and volume were significantly lower than in April 2019, due to a sharp decline in first sales of sprat, herring, cod and European plaice. Low by-catch levels of cod triggered a 21% increase in its average price, causing it to reach 1,57 EUR/kg.

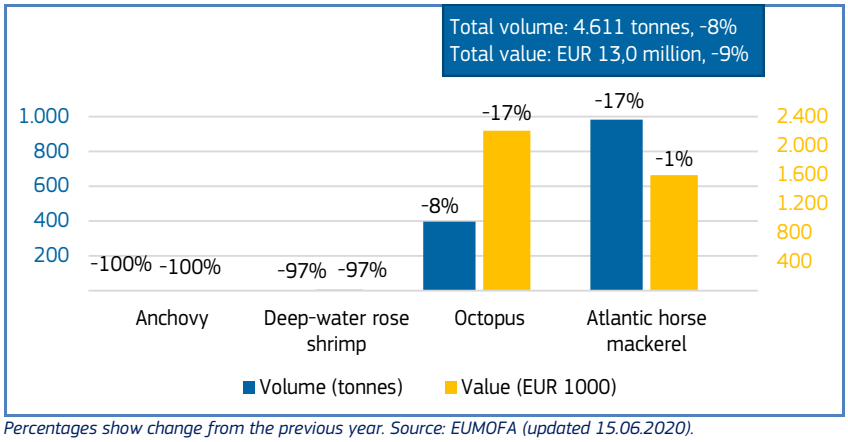
Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, APRIL 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).

In **Portugal** in **January–April 2020**, first sales decreased by 3% in value and 23% in volume compared to the same period in 2019. Decreases were mostly linked to lower sales of anchovy and were also observed in **April 2020** relative to the same month of 2019. Continued decreases in first-sales value and volume of anchovy, deep-water rose shrimp, octopus, and Atlantic horse mackerel, were responsible for the decline. There were no recorded sales of anchovy due to restrictions in its total allowable catch (TAC) in 2020[3].

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

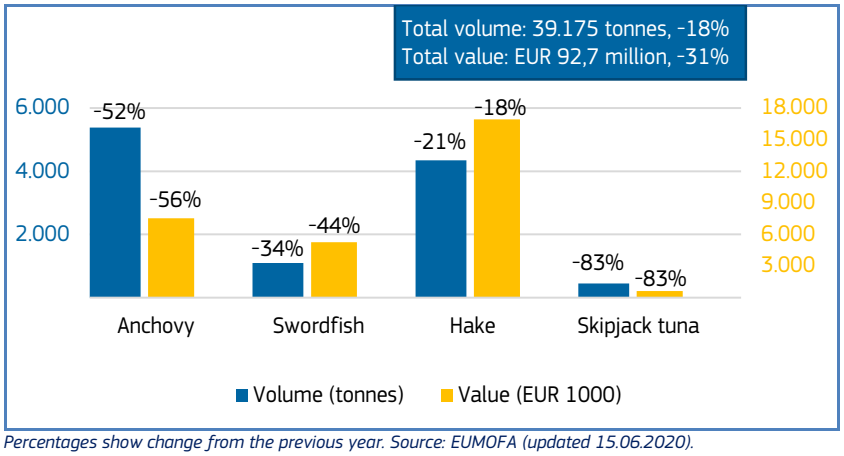


Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).

[3] Council Regulation (EU) 2019/1601 https://eur-lex.europa.eu/legal-content/GA/TXT/?uri=CELEX:32019R1601

In **Spain** in **January–April 2020**, relative to the same period of 2019, first sales showed a decrease in value (12%) and volume (1%) due to anchovy. In **April 2020**, first sales decreased in both value and volume in comparison to the same month in 2019. This was primarily due to lower sales of anchovy, swordfish, hake, and skipjack tuna. Swordfish recorded an average price decrease of 15%, falling to 4,81 EUR/kg.

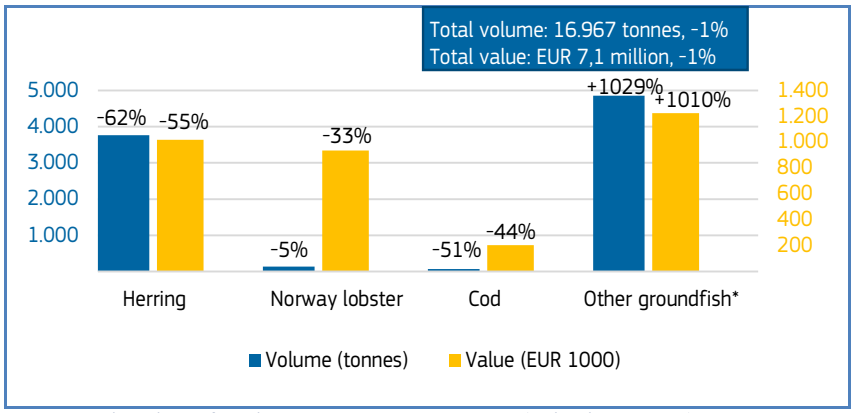
Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, APRIL 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).

In **Sweden** in **January–April 2020**, first sales dropped in both value (–26%) and volume (–39%) mainly due to herring and sprat compared to January–April 2019. In **April 2020** relative to April 2019, first-sales value and volume fell due to herring Norway lobster, cod. Other groundfish* recorded an opposite trend, causing a significant offset. Among these main commercial species, Norway lobster recorded the highest average price decrease (-29%, 6,58 EUR/kg).

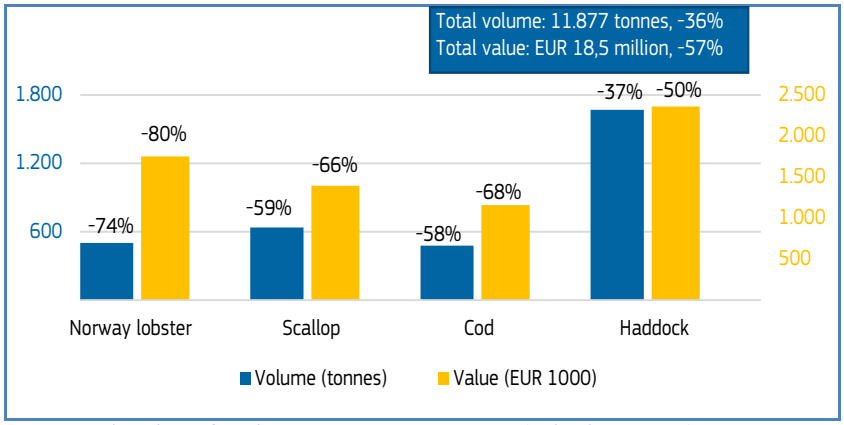
Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, APRIL 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).
**EUMOFA aggregation for species (Metadata 2, Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies).*

In the **UK** in **January–April 2020**, first-sales value decreased by 17% due to Norway lobster, crab, and scallop. Volume increased by 7% primarily due to mackerel and blue whiting. The changes for both value and volume are relative to the previous year. In **April 2020**, first-sales value and volume decreased relative to April 2019. The major species that caused this decline include Norway lobster, scallop, cod and, haddock. Norway lobster and cod recorded the decreases in average price (-23%) falling to 3,49 EUR/kg and 2,43 EUR/kg, respectively.

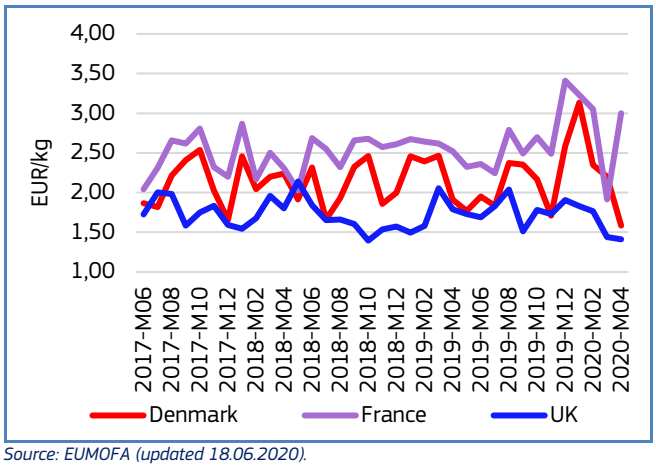
Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UK, APRIL 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 15.06.2020).

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

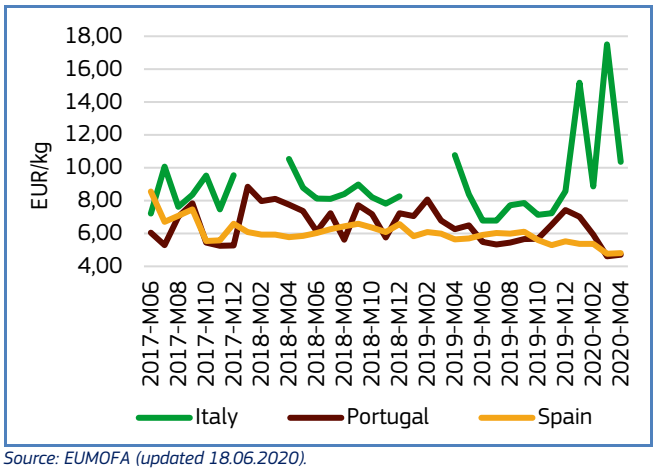
Figure 16. **FIRST-SALES PRICES OF HADDOCK IN DENMARK, FRANCE, AND THE UK**



Source: EUMOFA (updated 18.06.2020).

First sales of **haddock** occur primarily in **the UK**, as well as in **Denmark** and **France**. The average prices in April 2020 (the most recent available data) were 1,58 EUR/kg in Denmark (down 28% from March 2020, and 17% from April 2019); 3,00 EUR/kg in France (up from both the previous month and year by 57% and 19%, respectively). In the UK, the average price was 1,41 EUR/kg (down by 2% from March 2020 and 21% from April 2019). The increase in first-sales price in France was caused by a 64% decrease in supply from the previous month (80 tonnes). Haddock fisheries are seasonal, experiencing similar peaks (June–August) in Denmark and France. In the UK, peak supply varies from year to year, with highs recorded at various points (in October of 2018 and April of 2019). Over the past 36 months, prices increased in Denmark and France (the latter at a faster pace) and decreased slightly in the UK. During the same period, supply increased moderately in the UK, while it decreased in Denmark and France.

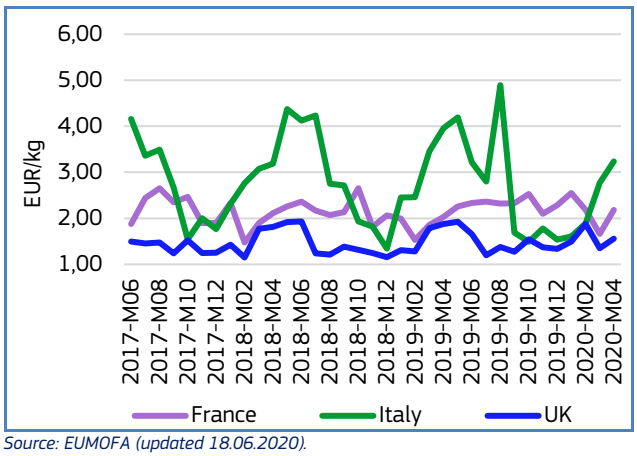
Figure 17. **FIRST-SALES PRICES OF SWORDFISH IN ITALY, PORTUGAL, AND SPAIN**



Source: EUMOFA (updated 18.06.2020).

EU first sales of **swordfish** occur predominately in **Spain**, **Italy**, and **Portugal**. In April 2020, the average first-sales prices of swordfish were 10,36 EUR/kg in Italy (41% less than March 2020 and 4% less than April 2019); 4,70 EUR/kg in Portugal (2% more than March 2020 and 25% less than April 2019); 4,81 EUR/kg in Spain (1% higher than March 2020, and 15% lower than April 2019). No fishing was recorded between January and March in 2018 and 2019. In April 2018 and 2019, registered price was at 10 EUR/kg, when fishing activity resumed. In April 2020, supply increased significantly from the previous month (rising from 10 kg to 14.000 kg in Italy and increasing by 20% in the UK). In Portugal, supply decreased by 93%. Over the past 36 months, swordfish prices have increased in Italy, and decreased in Portugal and Spain. Over the same period, supply increased in Portugal and Spain, and decreased in Italy. First-sales volume is seasonal, with varying peaks recorded in each of the three countries.

Figure 18. **FIRST-SALES PRICES OF WHITING IN FRANCE, ITALY, AND THE UK**



Source: EUMOFA (updated 18.06.2020).

EU first sales of **whiting** occur in many countries, including **France**, **Italy**, and **the UK**. In April 2020, the average first-sales prices of whiting were: 2,18 EUR/kg in France (up from both the previous month and year by 32% and 7%, respectively); 3,23 EUR/kg in Italy (up by 17% from the previous month, and down by 18% from the previous year); and 1,55 EUR/kg in the UK (16% higher than the previous month but 17% lower than the previous year). Supply is seasonal, with peaks experienced between January and March in France and the UK, and between October and December in Italy. The UK is the market with the highest first-sales volume. In April 2020, whiting supply increased in Italy (+20%) and decreased in France (-40%), and in the UK (-33%). Over the past 36-month period, prices have remained relatively stable in France and the UK but have decreased in Italy. Whiting supply has increased in Italy and the UK and decreased in France.

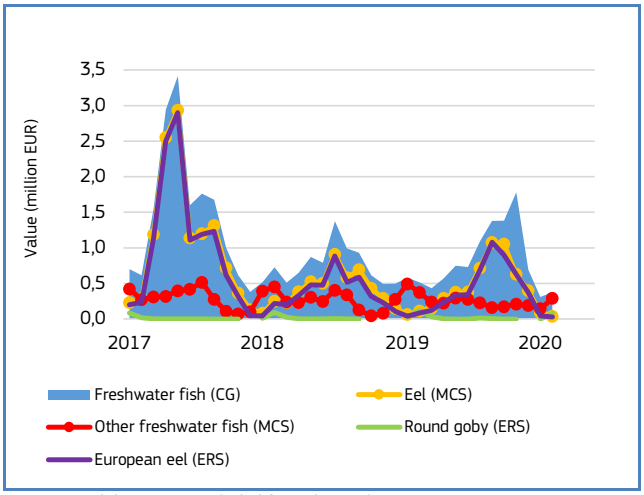
1.5. Commodity group of the month: freshwater fish[4]

The **"freshwater fish"** commodity group (CG[5]) ranked 9th in both value and volume among the 10 CGs sold at the first-sales stage in April 2020[6]. First sales of freshwater fish reached EUR 0,4 million and 408 tonnes, representing decreases of 36% and 2%, respectively, when compared to April 2019. In the past 36 months the highest first-sales value of freshwater fish was registered at EUR 3,4 million (September 2017).

Freshwater fish includes six main commercial species (MCS): carp, eel, freshwater catfish, pike, pike-perch, and the grouping other freshwater fish.

At Electronic Recording and Reporting System (ERS) level, European eel (8%) and round goby (21%) together accounted for 29% of the total reported first-sales value of the commodity group in April 2020.

Figure 19. **FIRST-SALES VALUE COMPARISON AT CG LEVEL, MCS LEVEL AND ERS LEVEL FOR REPORTING COUNTRIES* (MAY 2017 – APRIL 2020)**



**Norway and the UK are excluded from the analyses.*
Source: EUMOFA (updated 15.06.2020).

[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.

1.6. Focus on European eel

European eel (*Anguilla Anguilla*) is a catadromous fish born at sea, before migrating to inland freshwater environments. The species is widely distributed from seas in the north of Russia and Finland to the coasts of Morocco, Egypt, and the Black Sea and Mediterranean seas. It spawns in the Sargasso Sea in the middle of the North Atlantic, after which the larvae migrate to the coasts of Europe by drifting on the Gulf Stream. They spend most of their lifetime (6 to 20 years) in freshwater rivers, streams, and estuaries, a period known as the "yellow eel" stage. The species can live for over 80 years and reach up to 130 cm in length, although the average size of adults is 60-80 cm in length, with a weight of 1-2 kg[7]. Eel production is mainly driven by aquaculture, alongside number of wild fisheries using diverse gear: trawls, electric fishing, spears, traps and pots, hooks, weirs, rakes, pound nets, fyke nets, and others[8]. Fisheries of juvenile European eel (glass eel) are concentrated along the Atlantic coasts of Portugal, Spain, France, Morocco, and the Bristol Channel in the UK. Elsewhere, eel fisheries are maintained by restocking from domestic sources which are often supplemented by imports from France, Spain, and Portugal[9]. In 2007, the EU adopted measures[10] for the protection, recovery, and sustainable use of eel stocks. Today, the fishery is managed under long-term plans drawn up by EU Member States at river-basin level. According to these measures, Member States that fish glass eels (juvenile eel less than 12 cm long) must reserve 60% of their catch for restocking within the EU.

In 2009, the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) added European eels to its Appendix II list of species for which trade is monitored and regulated. As a result, any international trade of this species must be approved by a permit[11].

Selected countries

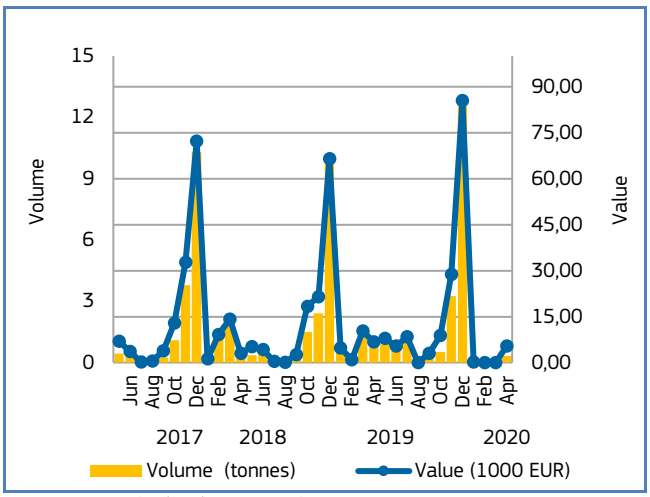
In **Italy**, eel fisheries concern the yellow and the silver eel stage. These are exploited by fishers on a seasonal basis[12].

In January–April 2020, first sales decreased by 14% in value and increased by 26% in volume relative to the same period of the previous year. Compared to 2018, first sales were higher by 36% in value and 19% in volume.

Of freshwater fish sold at the first-sales stage in April 2020, European eel accounted for 40% of total value and 10% of total volume (Figure 21).

Marano Lagunare in the Adriatic Sea was the port with the highest reported levels of European eel first sales in January–April 2020.

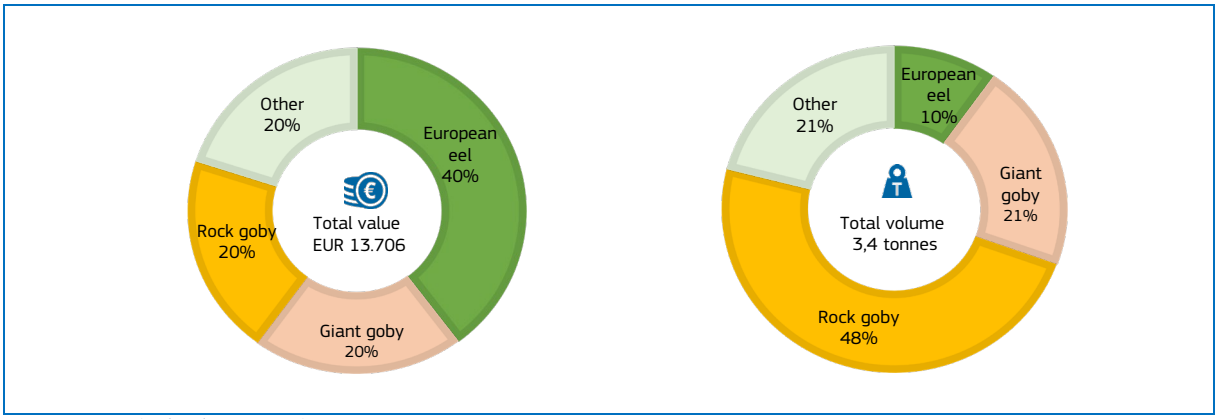
Figure 20. **EUROPEAN EEL: FIRST SALES IN ITALY**



Source: EUMOFA (updated 15.06.2020).

[7] https://ec.europa.eu/fisheries/marine_species/wild_species/eel_en
[8] http://www.fao.org/fishery/species/2203/en
[9] https://www.traffic.org/publications/eels-their-harvest-and-trade-in-europe-and-asia.html
[10] COUNCIL REGULATION (EC) No 1100/2007, https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32007R1100&from=EN
[11] https://www.cites.org/eng/app/appendices.php
[12] https://www.ices.dk/sites/pub/Publication%20Reports/Expert%20Group%20Report/Fisheries%20Resources%20Steering%20Group/2019/WGEEL/CRs_2019.pdf

Figure 21. **FIRST SALES: COMPARISON OF FRESHWATER FISH (ERS) IN ITALY, VALUE AND VOLUME, APRIL 2020**



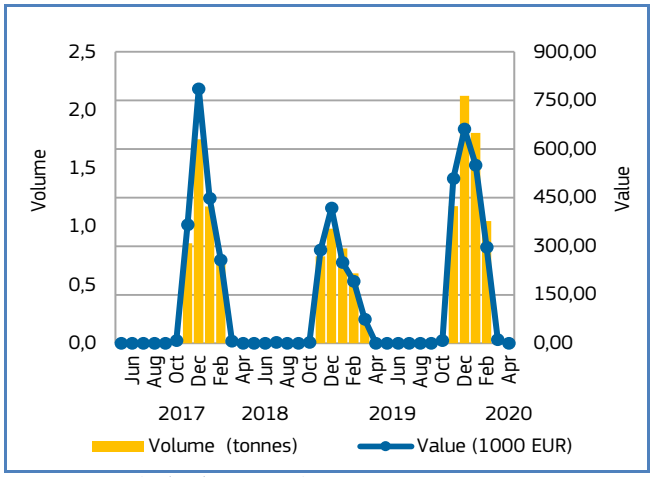
Source: EUMOFA (updated 15.06.2020).

In **Spain**, commercial European glass eel fishery is very traditional. In January–April 2020, first sales of eels (mainly glass eel) increased by 67% in value and 75% in volume relative to the same period in 2019. Compared with January–April 2018, value and volume increased by 20% and 52%, respectively.

Of freshwater fish sold at first sales stage in April 2020, river eels nei[13] accounted for 93% of value and 70% of volume (Figure 23).

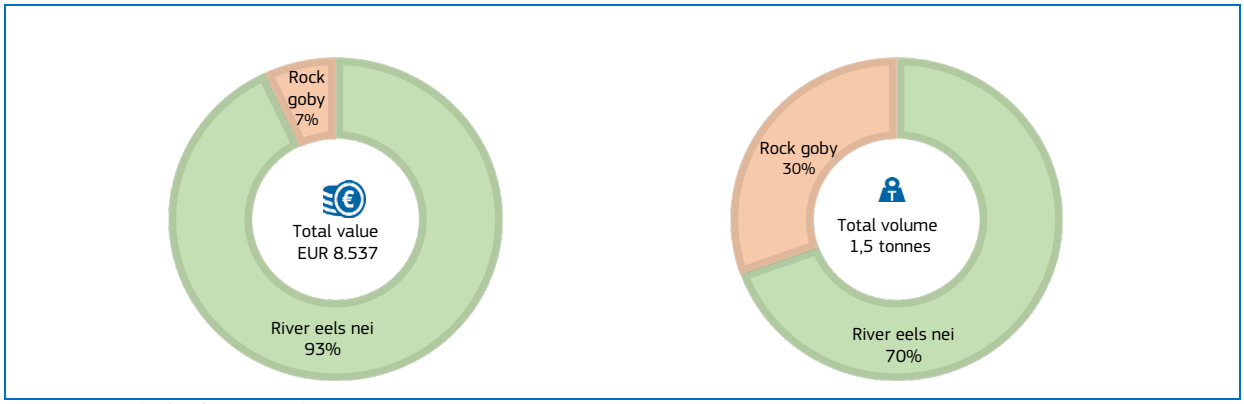
Ribadesella, La Guardia, and San Juan de la Arena were the ports in the Bay of Biscay responsible for nearly 80% of total first-sales value in January–April 2020.

Figure 22. **EUROPEAN EEL: FIRST SALES IN SPAIN**



Source: EUMOFA (updated 15.06.2020).

Figure 23. **FIRST SALES: COMPARISON OF FRESHWATER FISH (ERS) IN SPAIN, VALUE AND VOLUME, APRIL 2020**



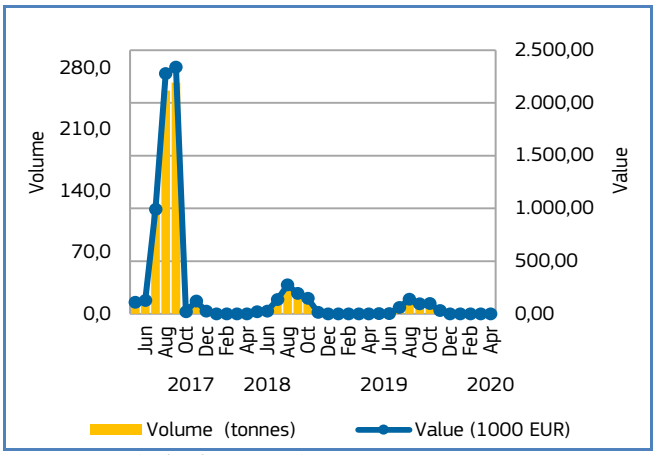
Source: EUMOFA (updated 15.06.2020).

[13] Not elsewhere included (include glass eel).

In **Sweden,** there are two main types of eel fishery. One is the traditional fishery with fixed traps (pound-nets) along the "Eel Coast" in the southernmost county Scania, where silver eels are the target species. The other type of fishery also uses large pound-nets but targets several species.
In January–April 2020, there were no recorded first sales of European eel due to fishery restrictions, (3-months moratorium from 1 November to 31 January[14]) and fishing seasonality. As a seasonal fishery activity, it mainly occurs during the summer months, although it was significantly lower in 2019 (August: 16 tonnes, September: 11 tonnes) and 2018 (August: 30 tonnes, September: 21 tonnes), relative to 2017, when first-sales volume in August and September was 254 and 263 tonnes, respectively.

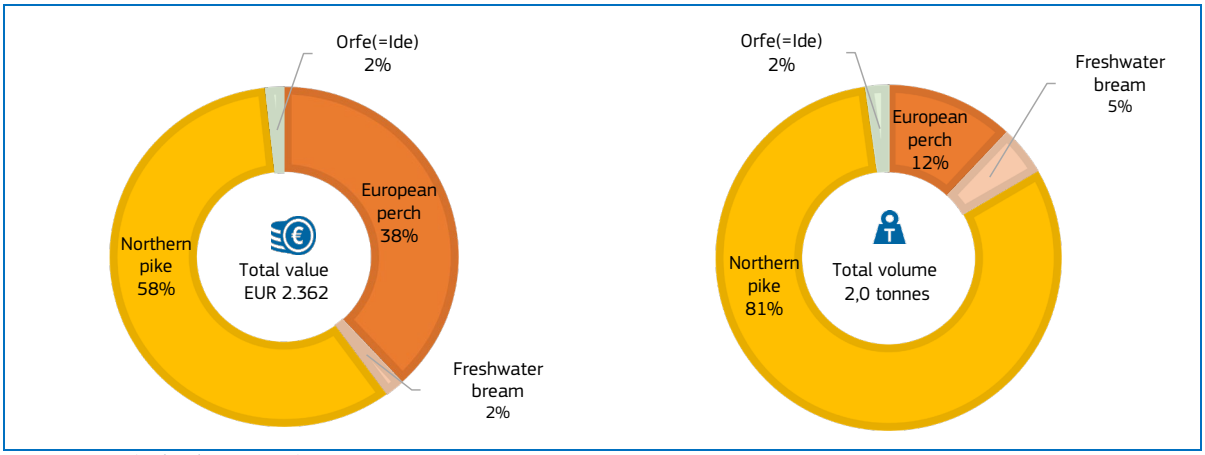
Of freshwater fish sold in April 2020, Northern pike and European perch accounted for the majority of total first-sales value and volume. There were no recorded sales of European eel due to fishery seasonality (Figure 25).

Figure 24. **EUROPEAN EEL: FIRST SALES IN SWEDEN**



Source: EUMOFA (updated 15.06.2020).

Figure 25. **FIRST SALES: COMPARISON OF FRESHWATER FISH (ERS) IN SWEDEN, VALUE AND VOLUME, APRIL 2020**

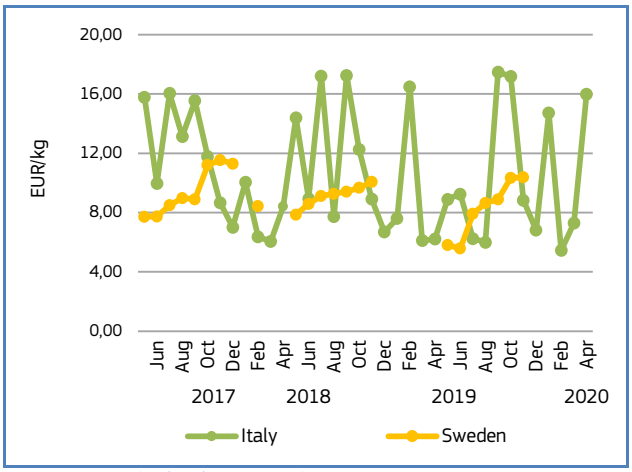


Source: EUMOFA (updated 15.06.2020).

[14] https://www.ices.dk/sites/pub/Publication%20Reports/Expert%20Group%20Report/Fisheries%20Resources%20Steering%20Group/2019/WGEEL/CRs_2019.pdf

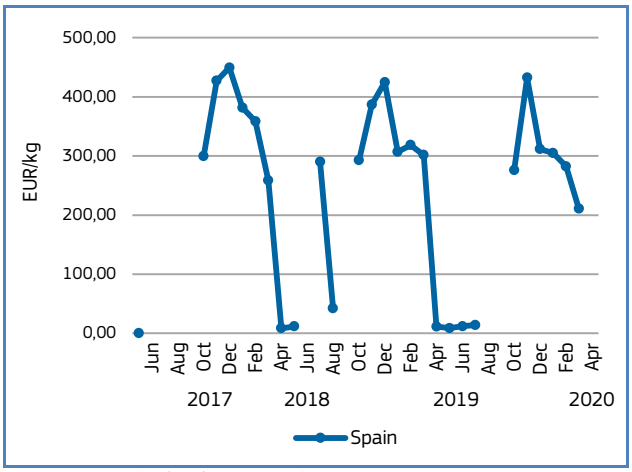
Price trend

Figure 26. **EUROPEAN EEL: FIRST-SALES PRICE IN ITALY AND SWEDEN**



Source: EUMOFA (updated 15.06.2020).

Figure 27. **EUROPEAN EEL: FIRST-SALES PRICE IN SPAIN**



Source: EUMOFA (updated 15.06.2020).

Over the 36-month observation period (May 2017–April 2020), the average first-sales price of European eel in **Italy** was 10,63 EUR/kg, which was 16% higher than in **Sweden** (8,94 EUR/kg). In **Spain**, it was significantly higher (237,90 EUR/kg) – the difference is due to a high share in first sales of glass eel in the country, which is valued more highly than adult (silver) eel. Compared with southern Europe, few glass eels reach the coast in the north, where traditional fisheries focus on adult eels migrating to the sea to spawn[15].

In **Italy** in April 2020, the average first-sales price of European eel (15,99 EUR/kg) increased by 157% relative to April 2019, and by 90% relative to April 2018. Such pronounced increases are closely linked to the low volume registered in April 2020. During the past 36 months, the average price varied from 5,45 EUR/kg for 8 kg in February 2020, to 17,47 EUR/kg for 178 kg in September 2019.

Spain saw no first-sales in April 2020 due to the seasonal nature of the country's eel fishery, which only occurs over a few months of the year. Over the observed period, the highest average price was recorded in December 2017 at 449,44 EUR/kg for 1.749 kg. Lower average prices were seen in April, May, and June for limited volumes, mainly derived from sales of adult silver eel, which is rarely caught in Spain.

In **Sweden** in April 2020 there were no first-sales of European eel. The lowest price in the observed period was recorded in June 2019 at 5,57 EUR/kg for 663 kg. The highest price (11,54 EUR/kg for 10.490 kg) was observed in November 2017.

[15] https://www.traffic.org/publications/eels-their-harvest-and-trade-in-europe-and-asia.html

1.7. Focus on round goby

The round goby (*Neogobius melanostomus*) is a bottom-dwelling species of the family Gobiidae, native to central Eurasia including the Black Sea and the Caspian Sea. There are large non-native populations (introduced through transportation in ballast water) in the Baltic Sea, several major Eurasian rivers, and the North American Great Lakes[16]. The round goby is established in all Baltic Sea sub-basins and is continuously increasing its range and abundance in recently colonised habitats. The biological and ecological features of the species, such as extremely aggressive behaviour at individual level and ability to sustain variable biotic and abiotic conditions, suggest that further range expansion is likely. Round goby is therefore considered to be one of the top invasive species in the Baltic Sea[17]. It is typically found near sandy, stony bottoms, marine structures and sunken objects and among mussel beds[18]. It ranges in length from 10 to 25 centimetres, and in weight from 5 to 80 grams. Round gobies are euryhaline (salt-tolerant) and are found in both freshwater and marine ecosystems. Adult round gobies feed mainly on molluscs and other small invertebrates. Females can spawn up to six times within a single spawning season, which typically last from April to September.

Round goby is a target species for fishermen in its native range and, although not currently targeted by European fisheries, could become commercially exploited in the future. Although population size would allow for this, the lack of market demand means that a round goby fishery would not be commercially viable at this point. In the Gulf of Gdańsk, large quantities of round gobies are occasionally caught as by-catch[19]. Recreational angling for round goby has become popular in Lithuanian coastal waters from April–June. To be able to utilize this abundant resource more effectively, round goby management measures have been introduced in Latvia, including a definition of a new fishing gear and terms of its use to minimize the by-catch of non-target species[20].

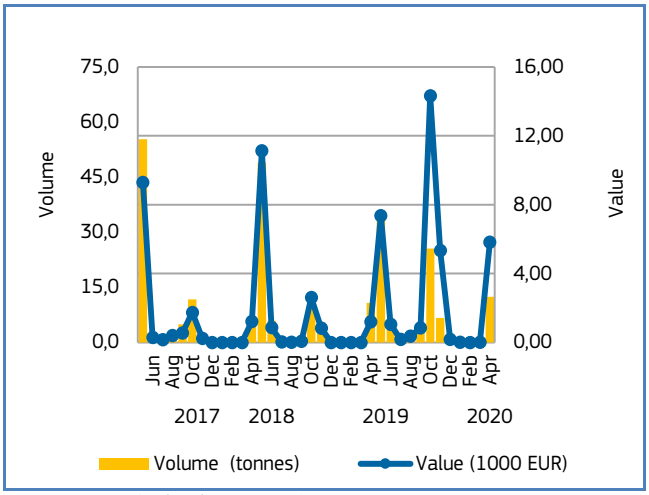
Selected countries

In **Estonia** in January–April 2020, first sales of round goby increased by 383% in value and 15% in volume relative to the same period of 2019. Compared to 2018, first sales rose by 377% in value and 100% in volume. The sharp increase in value was caused by higher average prices and wider availability of species, indicating that round goby populations are expanding into new areas of Estonian waters.

Of freshwater fish sold at first-sales stage in April 2020, round goby accounted for 3% of total first-sales value and 5% of total volume.

The ports of Lindi, Ösel Fish and Raeküla in the Baltic Sea accounted for 59% of reported first sales value of round goby in January–April 2020.

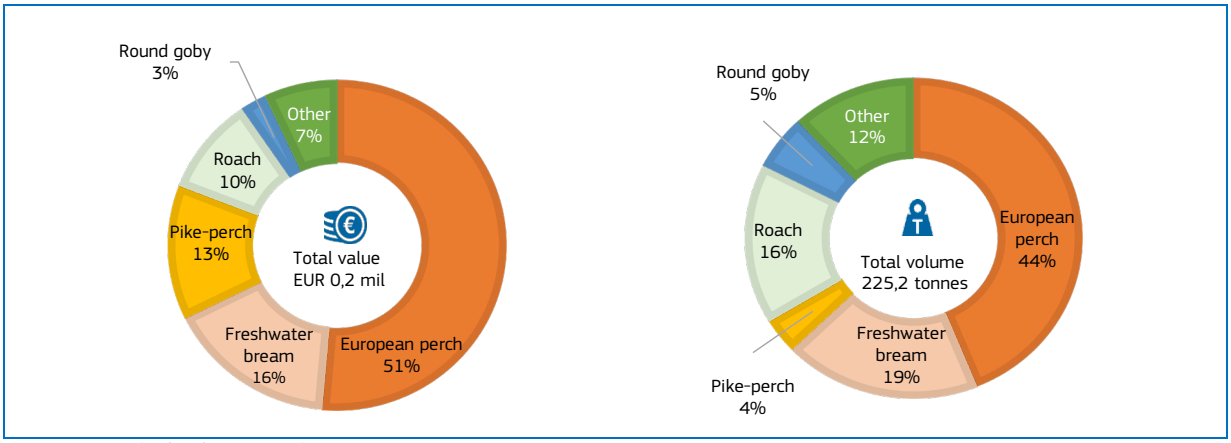
Figure 28. **ROUND GOBY: FIRST SALES IN ESTONIA**



Source: EUMOFA (updated 15.06.2020).

[16] Journal of Fish Biology 2012 (80), 235–85. https://pubmed.ncbi.nlm.nih.gov/22268429/
[17] https://orbit.dtu.dk/ws/files/169448066/Publishers_version.pdf
[18] https://www.nobanis.org/globalassets/speciesinfo/n/neogobius-melanostomus/neogobius_melanostomus.pdf
[19] https://www.nobanis.org/globalassets/speciesinfo/n/neogobius-melanostomus/neogobius_melanostomus.pdf
[20] Bartule, I., and Adamenko. 2017. New things in fisheries regulation (in Latvian). Latvian Fisheries Yearbook 2017. The Latvian Rural Advisory and Training Centre, p. 185.

Figure 29. **FIRST SALES: COMPARISON OF FRESHWATER FISH (ERS) IN ESTONIA, VALUE AND VOLUME, APRIL 2020**



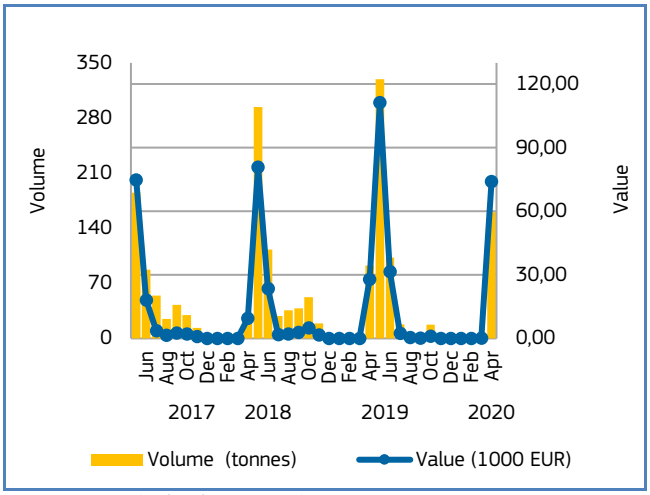
Source: EUMOFA (updated 15.06.2020).

In **Latvia** in January–April 2020, first sales of round goby increased by 165% in value and 73% in volume relative to the same period in 2019. Compared with 2018, value and volume rose by 681% and 593%, respectively. One of the highest round goby commercial landings in the Baltic Sea has been observed in Latvian coastal waters (April 2020), supporting suggestions that the species' population size has steadily increased over recent years[21].

Round goby accounted for 98% of total first-sales value and 99% of volume of freshwater fish sold in April 2020.

The ports of Jurmalciems and Liepaja in the Baltic Sea were responsible for 82% of total first-sales value in January–April 2020.

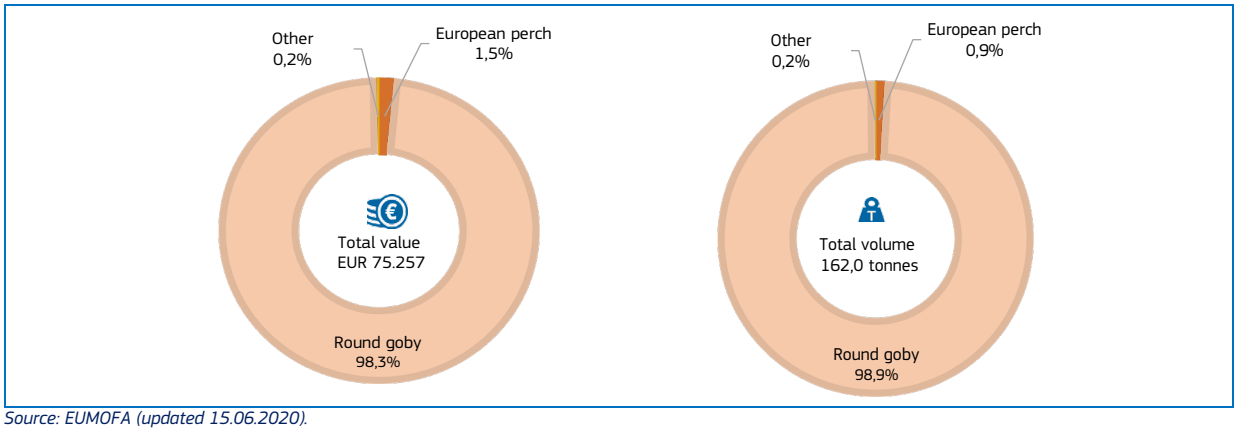
Figure 30. **ROUND GOBY: FIRST SALES IN LATVIA**



Source: EUMOFA (updated 15.06.2020).

[21] Kornilovs, G. 2017. The state of fish stocks and catch control in the Baltic Sea in 2016-2017 (in Latvian).

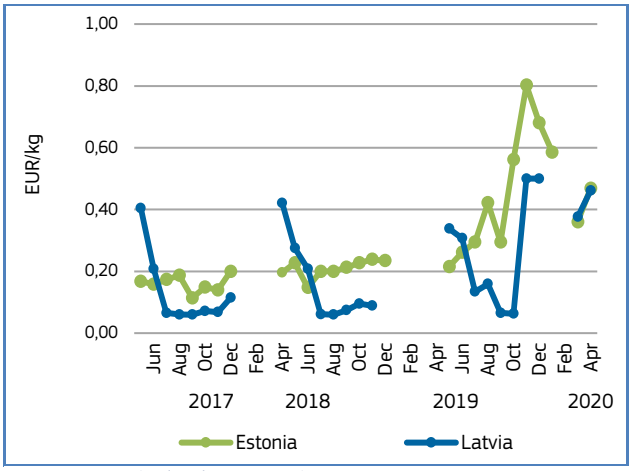
Figure 31. **FIRST SALES: COMPARISON OF FRESHWATER FISH (ERS) IN LATVIA, VALUE AND VOLUME, APRIL 2020**



Source: EUMOFA (updated 15.06.2020).

Price trends

Figure 32. **ROUND GOBY: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 15.06.2020).

Average first-sales price of round goby in **Estonia** and **Latvia** has increased steadily over recent years. During the 36-month observation period (May 2017–April 2020), the average price in Estonia was 0,28 EUR/kg. This was 45% higher than the average price in Latvia (0,20 EUR/kg).

In **Estonia** in April 2020, the average first-sales price of round goby (0,47 EUR/kg) increased by 316% relative to April 2019, and by 139% relative to April 2018. During the past 36 months the lowest price was recorded in April 2019 at 0,11 EUR/kg for 11 tonnes. The highest price (0,80 EUR/kg for 7 tonnes) was recorded in November 2019.

In **Latvia**, the average price of round goby in April 2020 was 0,46 EUR/kg, 53% more than the same month of the previous year, and 10% more than the same months of 2018. In the observed period the average price fluctuated from 0,06 EUR/kg for 42 tonnes in September 2017 to 0,46 EUR/kg for 160 tonnes in April 2020[22].

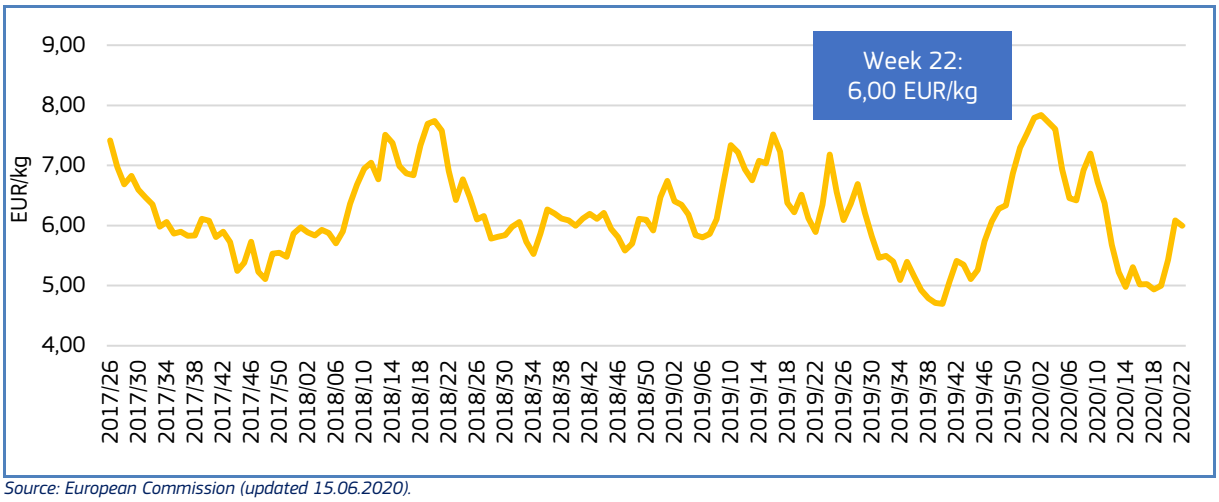
[22] Average price of 0,50 EUR/kg for 8 kg in November 2019 is excluded due to low representativeness of volume.

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. Every month, the three species that are the most relevant in terms of value and volume are examined: fresh whole Atlantic salmon from Norway, frozen 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, freshwater fish). This month, the featured commodity species are frozen catfish from Vietnam, fresh or chilled Nile perch fillets from Uganda, and prepared or preserved eels from China. The remaining three species are randomly selected and, this month, include frozen Atlantic horse mackerel from Norway, frozen squid from the US, and prepared or preserved anchovies from Morocco.*

The weekly price of **fresh, whole Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway** reached 6,00 EUR/kg in **week 22** (commencing 25th May). This price represents an increase from both the preceding four-week average (5,36 EUR/kg,) and the previous year (5,89 EUR/kg), by 12% and 2%, respectively. The price for fresh, whole Atlantic salmon was slightly lower (-1%) than the previous week (week 21), corresponding to a 6% decrease in volume. Imports in week 22 totalled 10.300 tonnes, 11% less than the preceding four-week average, and down by 14% from the previous year. Lower demand led to an increase in the import price. In 2020, price has so far exhibited a significant downward trend, while volume has increased moderately.

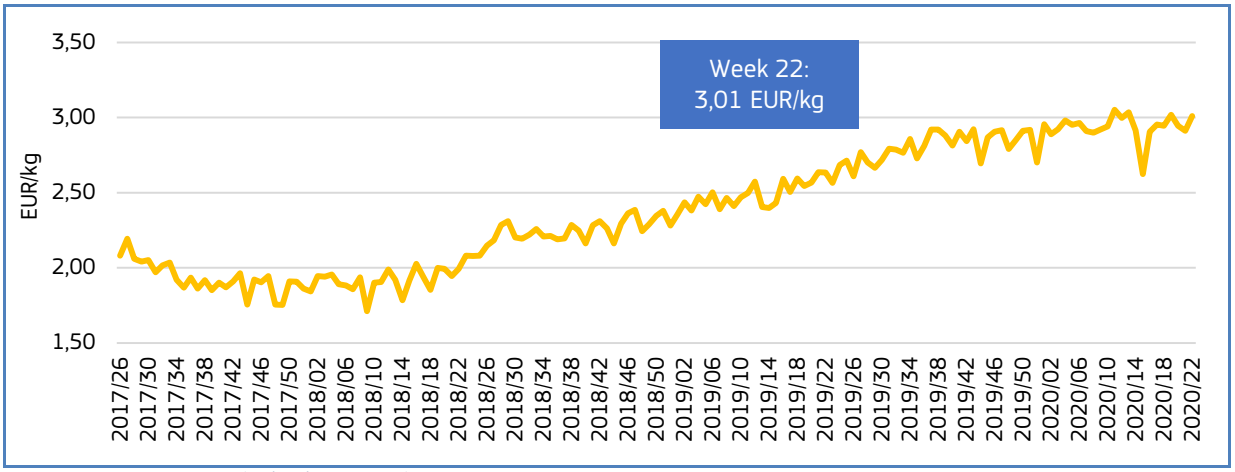
Figure 33. **IMPORT PRICE OF ATLANTIC SALMON, FRESH AND WHOLE FROM NORWAY**



Source: European Commission (updated 15.06.2020).

For **frozen fillets** of **Alaska pollock** (*Theragra chalcogramma*, CN code 03047500) imported from **China**, the price in **week 22** was 3,01 EUR/kg, 2% higher than the preceding four-week average (2,96 EUR/kg), and 14% higher than the same week in 2019 (2,63 EUR/kg). The price was 3% higher than the previous week (week 21), corresponding to a substantial increase in volume (+47%), which can be attributed to an increase in demand for products imported from China. Volume totalled 3.300 tonnes, which was 55% higher than the preceding four-week average, and 12% higher than the same week in 2019. Since the beginning of 2020, the price has remained stable, while volume is decreasing.

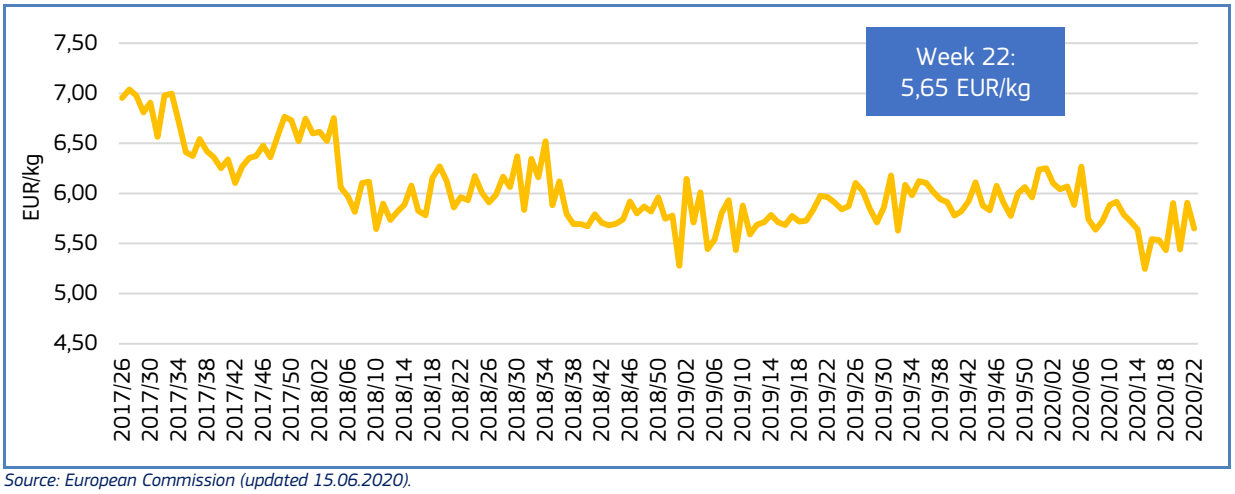
Figure 34. **IMPORT PRICE OF ALASKA POLLOCK, FROZEN FILLETS FROM CHINA**



Source: European Commission (updated 15.06.2020).

The price of **frozen tropical shrimp** (genus *Penaeus*, CN code 03061792) from **Ecuador** was 5,65 EUR/kg in **week 22**: remained unchanged from the average of the preceding four weeks (5,67 EUR/kg), and was down 5% from the same week in 2019 (5,96 EUR/kg). The price was 4% lower than the previous week (week 21), corresponding to a 14% increase in volume. The volume in week 22 (969 tonnes) represented a decrease from both the previous four-week average and the same week in 2019 (-14% and -40%, respectively). This product experienced high fluctuations in supply. Over the past three years, price has exhibited a general downward trend while volume has remained relatively stable. In 2020, price fluctuated, falling by 10% from a peak of 6,29 EUR/kg in week 6 (due to a sudden drop in supply), while volume increased by 36%.

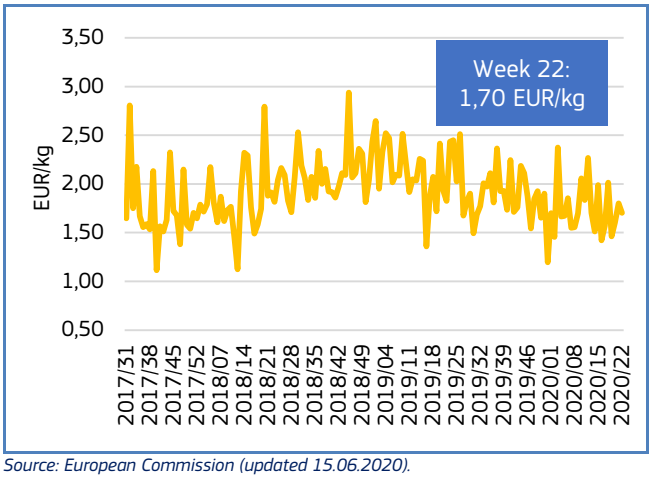
Figure 35. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR**



Source: European Commission (updated 15.06.2020).

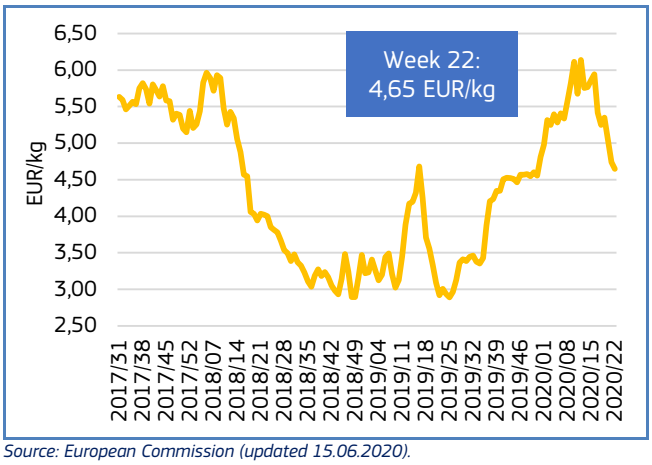
The price of **frozen catfish** (*Pangasius* spp., *Silurus* spp., *Clarias* spp., *Ictalurus* spp., CN code 03032400) imported from **Vietnam** was 1,70 EUR/kg in **week 22**. This was lower than both the preceding four-week average of 1,72 EUR/kg and the same week in 2019, when it was 1,83 EUR/kg (-1% and -7%, respectively). The volume recorded in week 22 (140 tonnes) was significantly higher than both the preceding four-week average and the same week in 2019 (+147% and +165%, respectively). Price fluctuated between 1,11-2,94 EUR/kg and was volatile on a week-to-week basis. Since week 1 of 2020, both price and volume have declined moderately. France, the Netherlands, and the United Kingdom are EU's top importers of the species.

Figure 36. **IMPORT PRICE OF FROZEN CATFISH FROM VIETNAM**



Source: European Commission (updated 15.06.2020).

Figure 37. **IMPORT PRICE OF FRESH OR CHILLED NILE PERCH FILLETS FROM UGANDA**

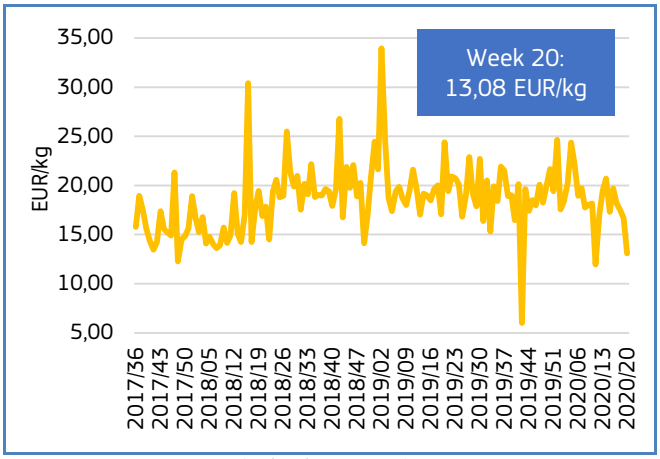


Source: European Commission (updated 15.06.2020).

The price of **fresh or chilled Nile perch fillets** (*Lates niloticus*, CN code 03043300) from **Uganda** was 4,65 EUR/kg in **week 22**. This represented a decrease of 9% from the preceding four-week average (5,10 EUR/kg), and a 59% increase from the same week in 2019 (2,92 EUR/kg). The product's price ranged from lows of 2,89 EUR/kg in weeks 48 and 49 of 2018, and week 25 of 2019, to a high of 6,14 EUR/kg in week 12 of 2020. The volume recorded in week 22 of 2020 (96 tonnes) was lower than both the preceding four-week average and the same week in 2019 (-10% and -57%, respectively). In 2020, both price and supply showed a slight downward trend. Belgium, Italy, and the Netherlands are EU's most significant importers of fresh or chilled Nile perch fillets from Uganda.

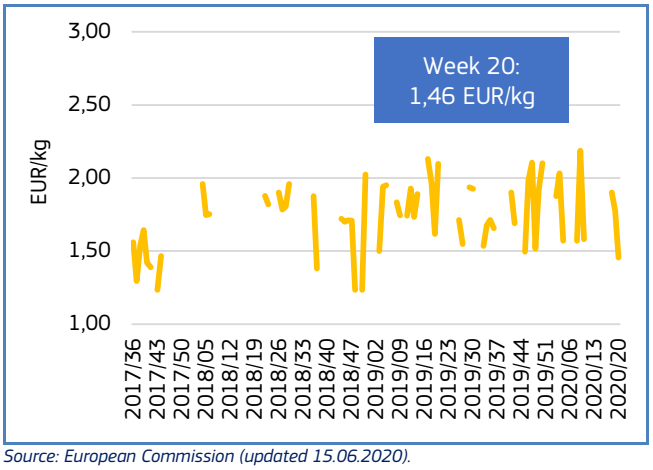
For **prepared or preserved eels** (CN code 16041700) from **China**, the price in **week 20** of 2020 (the most recent available data) was 13,08 EUR/kg: this was significantly lower than both the preceding four-week average (18,00 EUR/kg, –27%), and that of the previous year (24,39 EUR/kg, –46%). Both price and volume showed weekly fluctuations. A spike in price in week 16 of 2018 (30,41 EUR/kg) did not correlate with a drop in first-sales volume. By contrast, the highest recorded price (33,95 EUR/kg) in week 2 of 2019 occurred in connection to a 28% drop in supply. The lowest price in week 42 of 2019 (5,99 EUR/kg) corresponds to a 36% drop of first-sales volume. The volume of 3,5 tonnes in week 22 was lower than both the preceding four-week average (of 20 tonnes) and the same week in 2019, when volume was 10 tonnes (-82% and -64%, respectively). Since the beginning of 2020, both price and volume have declined slightly. Germany and the Netherlands are EU's top importers of the product.

Figure 38. **IMPORT PRICE OF PREPARED OR PRESERVED EELS FROM CHINA**



Source: European Commission (updated 15.06.2020).

Figure 39. **IMPORT PRICE OF FROZEN ATLANTIC HORSE MACKEREL FROM NORWAY**

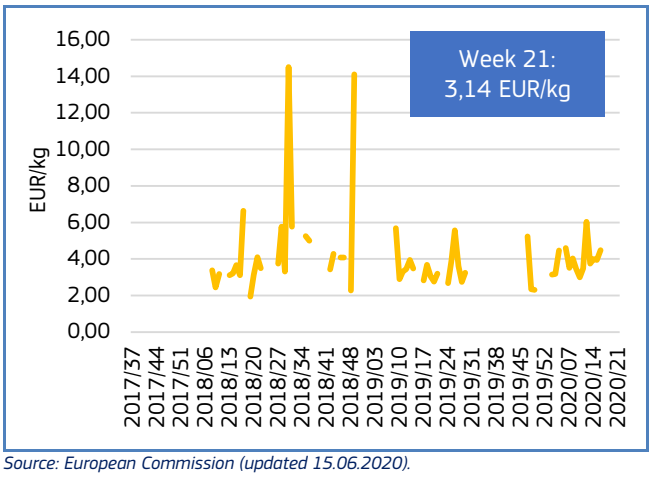


Source: European Commission (updated 15.06.2020).

The price of **frozen Atlantic horse mackerel** (*Trachurus trachurus*, CN code 03035510) from **Norway** was 1,46 EUR/kg in **week 20** (the most recent available data), representing a decrease from both the preceding two-week average (1,84 EUR/kg, -21%), and that of the previous year (2,10 EUR/kg, -31%). The recorded volume of 24 tonnes in week 20 was lower than the four-week average (70 tonnes, -66%), and significantly higher than that of the previous year (9,6 tonnes, +150%). Imports of this product are sporadic. Prices fluctuated from 1,23 to 2,19 EUR/kg. Over the past 36 months the price of frozen Atlantic horse mackerel remained stable, while supply increased.

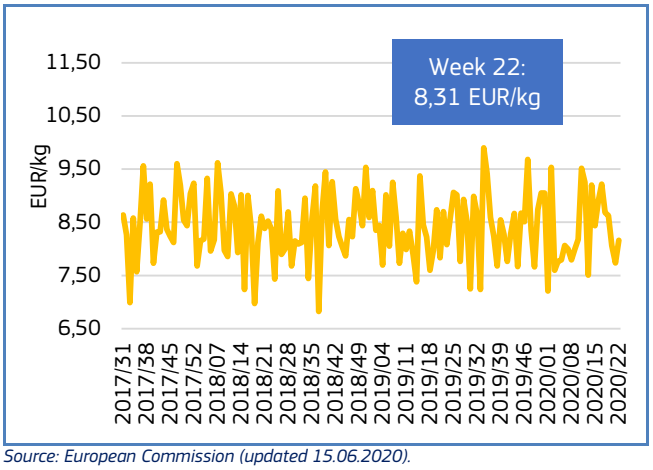
The price of **frozen squid** (*Loligo pealei*, CN code 03074333) from the **US** reached 3,14 EUR/kg in **week 21** (the most recent available data), which was lower than both the preceding two-week average (3,62 EUR/kg, -13%), and that of the previous year (3,20 EUR/kg, -2%). The recorded volume of 21 tonnes in week 21 was significantly lower than both the preceding two-week average (47 tonnes, -55%), and that of the previous year (48 tonnes, -56%). This is a sporadically traded product. Prices showed weekly fluctuations varying from 1,95 EUR/kg (week 19 of 2018) to 15,17 EUR/kg (week 3 of 2018). Peaks in price were generally correlated with low volume levels, with one exception, when the volume corresponding to the price spikes was the same: 1 tonne. Since the beginning of 2020, both price and volume have increased; with volume increasing more rapidly than price. Italy is EU's largest importer of the product.

Figure 40. **IMPORT PRICE OF FROZEN SQUID FROM THE US**



Source: European Commission (updated 15.06.2020).

Figure 41. **IMPORT PRICE OF PREPARED OR PRESERVED ANCHOVIES FROM MOROCCO**



Source: European Commission (updated 15.06.2020).

The price of **prepared or preserved anchovies** (CN code 16041600), from **Morocco** was 8,31 EUR/kg in **week 22**. This was lower than both the preceding four-week average (8,28 EUR/kg, –1%), and the previous year (8,70 EUR/kg, –6%). Over the past three years prices have ranged between 7,00 and 8,00 EUR/kg. Price and volume fluctuate weekly, although both present clear trends over extended periods, with price has remaining relatively stable while volume decreased moderately. The recorded volume of 181 tonnes in week 22 represented a 6% increase from the preceding four weeks (172 tonnes) and a 21% decrease from the previous year (229 tonnes). France, Italy, and Spain are the EU's top importers of the product.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In April 2020, relative to April 2019, the household consumption of fresh fisheries and aquaculture products increased in both volume and value in Denmark, Germany, the Netherlands, Portugal, Spain, and Sweden. Consumption decreased in both volume and value in the rest of the Member States analysed.

The drop seen in Ireland was mainly due to reduced consumption of shrimp and cod (-96% and -30%, respectively). Reduced consumption of salmon (-19%) contributed to the overall decrease in household consumption in Poland.

On the other hand, a rise in gilthead seabream and clam consumption (+56% and 89%, respectively) contributed to the increases seen in Portugal, while salmon was the primary driver for increased consumption in Spain (+85%).

Table 3. **APRIL 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	April 2017		April 2019		March 2020		April 2020		Change from April 2019 to April 2020	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	27,0	910	13,69	1.072	17,88	1.191	19,20	1.304	21,76	22%	22%
France	33,7	15.419	182,14	15.720	193,80	13.851	179,05	12.821	180,76	18%	7%
Germany	13,4	4.136	61,57	5.723	87,76	4.934	82,13	6.042	100,98	6%	15%
Hungary	5,6	215	1,37	421	2,21	298	1,79	414	2,18	2%	1%
Ireland	23,0	982	14,09	1.969	16,22	1.020	15,12	981	14,83	50%	9%
Italy	30,9	24.240	246,94	24.547	251,13	22.794	240,59	19.753	207,52	20%	17%
Netherlands	21,1	2.053	34,59	2.362	41,50	3.106	53,25	2.647	48,22	12%	16%
Poland	15,0	3.150	18,97	3.870	25,75	3.897	24,73	3.248	21,01	16%	18%
Portugal	56,8	3.710	24,53	4.928	30,58	11.453	77,09	6.891	48,59	40%	59%
Spain	45,6	49.578	371,16	48.835	379,51	49.996	412,96	59.159	496,98	21%	31%
Sweden	26,6	567	7,66	918	10,94	759	10,21	951	12,25	4%	12%

Source: EUMOFA, based on Europanel (updated 18.06.2020).
** 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 the average household consumption of fresh fisheries and aquaculture products in April has been above the annual average in both volume and value in Denmark, Germany, Portugal, Spain, and Sweden. The only exceptions were seen in Ireland where value fell below the annual average, and in the Netherlands where volume was lower than the average. In the rest of the Member States surveyed, consumption of fresh fisheries and aquaculture products in the month of April was below the annual average.

The most recent weekly consumption data **(up to week 29 of 2020)** are available on the EUMOFA website, and can be accessed **here**.

3.2. Fresh mussel *Mytilus* spp.

Habitat: Mussels are found in a broad range of habitats, from tidal areas to fully submerged zones. They are adapted to a broad range of temperatures and salinities[23].
Catch and production areas: North Atlantic, the Mediterranean and Black seas.
Producing countries in the EU: Spain, Italy, France, Denmark, the Netherlands.
Production method: Caught and farmed.
Main consumers in the EU: Italy, France, Spain, Belgium, and the Netherlands.
Presentation: Whole live or unshelled.
Preservation: Live, fresh, chilled, frozen, canned, marinated.
Means of preparation: Cooked.

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

Denmark is an EU Member State with high per capita apparent consumption[24] of fisheries and aquaculture products. In 2017, this amounted to 27,0 kg per capita, 11% higher than the EU average of 24,3 kg per capita, although 52% lower than that of Portugal (the Member State with the highest consumption). Relative to 2016, apparent consumption in Denmark increased by 5,9%.

Per capita apparent consumption of fisheries and aquaculture products in Germany is among the lowest in the EU. In 2017, it was at 13,4 kg. This represented a decrease of 5% relative to the previous year and was 45% lower than the EU average.

Per capita apparent consumption in the Netherlands in 2017 was 21,1 kg, 13% lower than the EU average and representing a slight increase from 2016 (+ 0,5%). Dutch consumption was 57% higher than that of Germany. See more on per capita apparent consumption in the EU in Table 3.

Over the past three years household consumption of fresh mussel *Mytilus* spp. in Germany was 4% higher than that of the Netherlands. Denmark exhibited the lowest consumption of the three countries analysed. German consumers also spent more for a kilogram of fresh mussels (7,12 EUR/kg on average), almost 50% more than that spent by consumers in the Netherlands (3,93 EUR/kg on average).

We have covered **mussel *Mytilus* spp.** in previous *Monthly Highlights*:

First sales: Denmark 9/2017, 2/2016; Italy 9/2017; Portugal 9/2017.

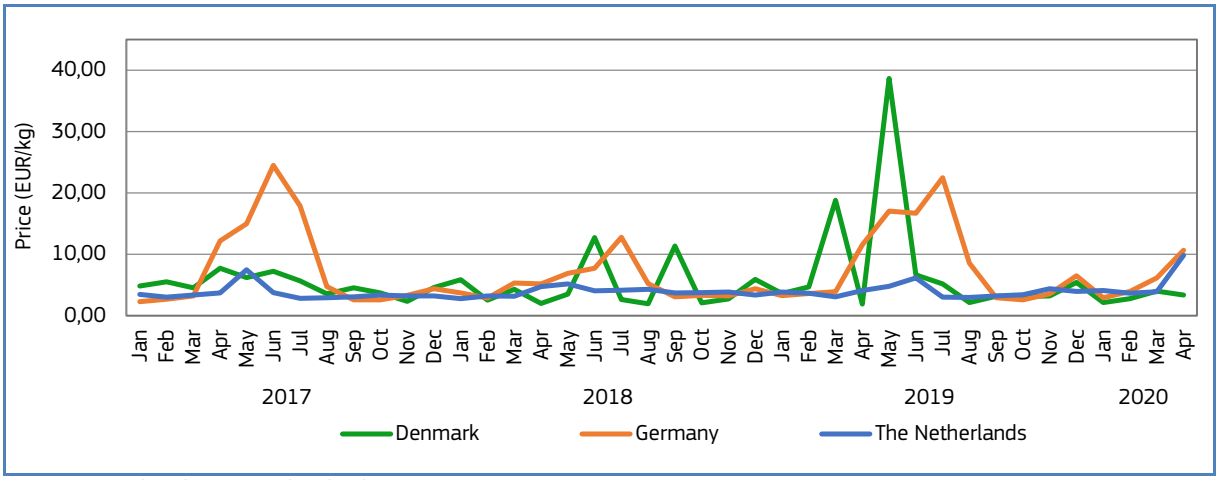
Consumption: Belgium 7/2016; Denmark 6/2018, 7/2016; France 7/2016, 7/2015, 4/2014; Germany 6/2018; Italy 6/2018, 7/2016, 7/2015, 4/2014; the Netherlands 6/2018, 7/2016, 4/2014; Spain 7/2016, 7/2015, 4/2014; the UK 4/2014.

Extra-EU Import: Chile 4/2018, Norway 1/2019.

Topic of the month: Mussel in the EU 5/2017, Fresh mussels in the Spanish market Feb 2013.

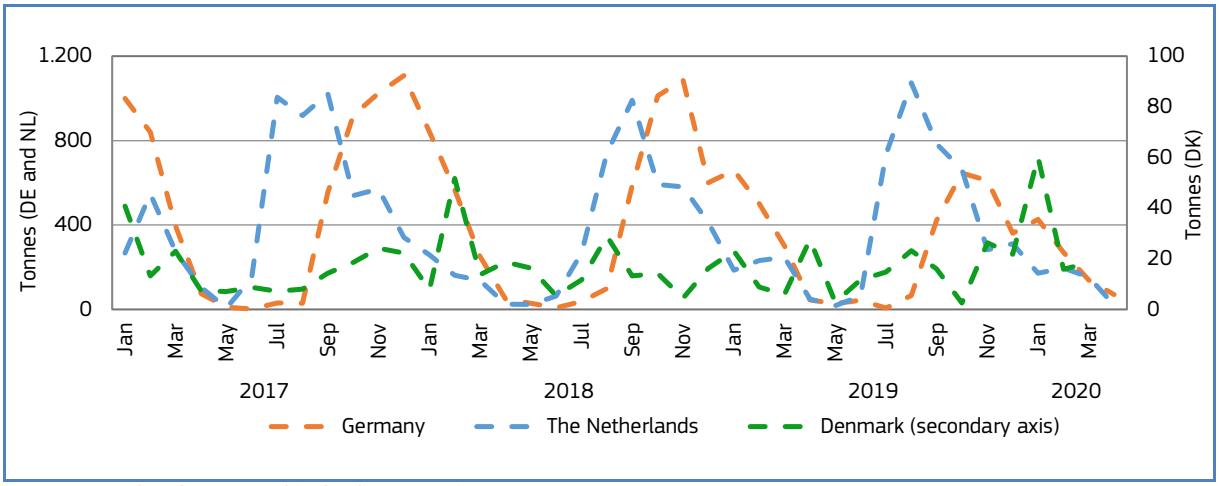
[23] https://www.eumofa.eu/documents/20178/120635/MH+6+2018_final.pdf
[24] "Apparent consumption" is calculated by using the supply balance sheet that provides an estimate of the supply of fishery and aquaculture products available for human consumption at EU level. The calculation of the supply balance sheet is based on the equation: *Apparent consumption = [(total catches – industrial catches) + aquaculture + imports] – exports*. Catches targeted for fishmeal (industrial catches) are excluded. Non-food use products are also excluded from imports and exports.

Figure 42. **PRICES OF FRESH MUSSEL *MYTILUS* SPP., PURCHASED BY HOUSEHOLDS**



Source: EUMOFA, based on Europanel (updated 22.05.2020).

Figure 43. **HOUSEHOLD PURCHASES OF FRESH MUSSEL, *MYTILUS* SPP.**

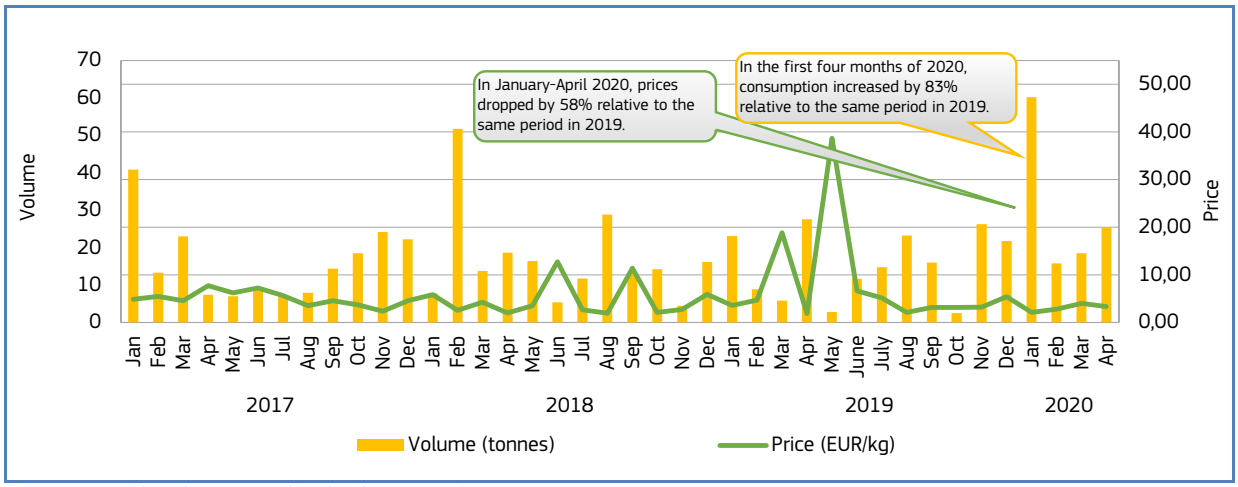


Source: EUMOFA based on Europanel (updated 22.05.2020).

3.2.2. Consumption trends in Denmark

Long-term trend (January 2017 to April 2020): Increasing in both price and volume.
Yearly average price: 5,02 EUR/kg (2017), 4,79 EUR/kg (2018), 8,03 EUR/kg (2019).
Yearly consumption: 194 tonnes (2017), 202 tonnes (2018), 184 tonnes (2019).
Short-term trend (January 2020 to April 2020): Increasing in price and decreasing in volume.
Average price: 3,06 EUR/kg.
Average consumption: 120 tonnes.

Figure 44. **RETAIL PRICE AND VOLUME OF FRESH MUSSEL, *MYTILUS* SPP., PURCHASED BY HOUSEHOLDS IN DENMARK**

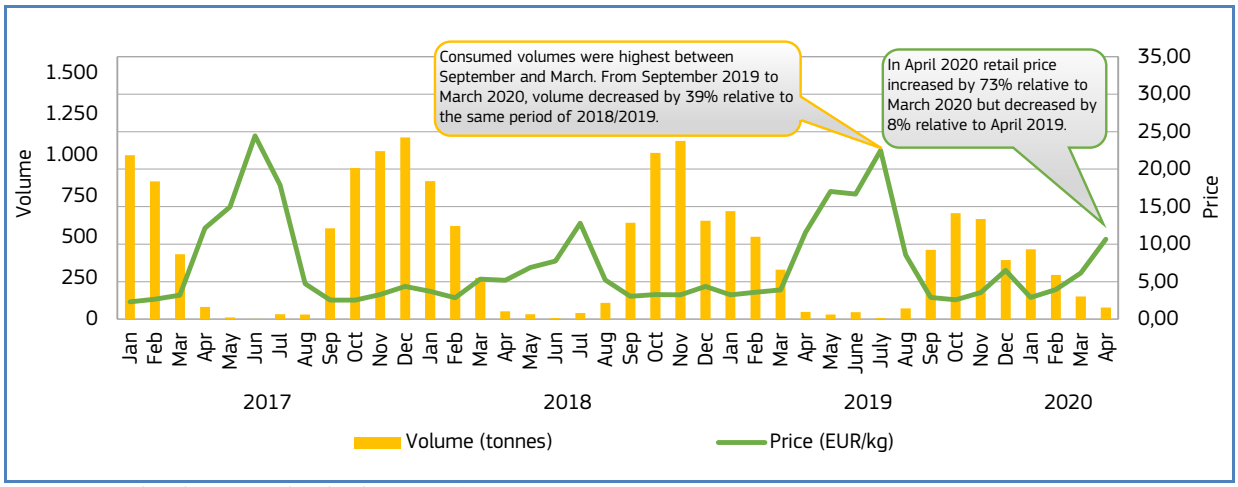


Source: EUMOFA, based on Europanel (updated 22.05.2020).

3.2.3. Consumption trends in Germany

Long-term trend (January 2017 to April 2020): Decreasing in both price and volume.
Yearly average price: 7,92 EUR/kg (2017), 5,30 EUR/kg (2018), 8,55 EUR/kg (2019).
Yearly consumption: 5.987 tonnes (2017), 5.169 tonnes (2018), 3.691 tonnes (2019).
Short-term trend (January 2020 to April 2020): Increasing in price and decreasing in volume.
Average price: 5,91 EUR/kg.
Average consumption: 906 tonnes.

Figure 45. **RETAIL PRICE AND VOLUME OF FRESH MUSSEL, *MYTILUS* SPP., PURCHASED BY HOUSEHOLDS IN GERMANY**

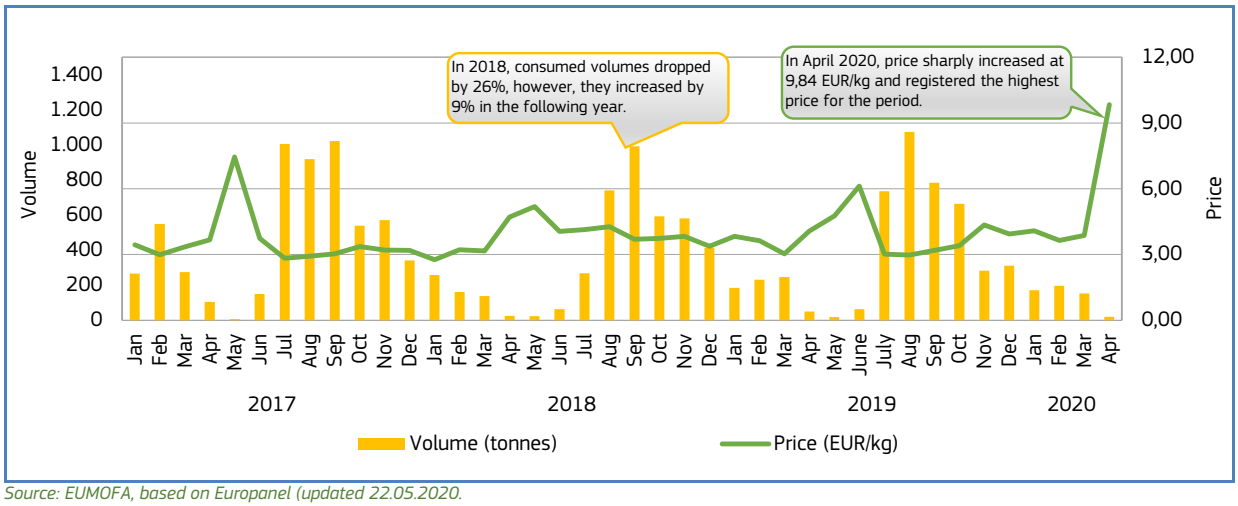


Source: EUMOFA, based on Europanel (updated 22.05.2020).

3.2.4. Consumption trends in the Netherlands

Long-term trend (January 2017 to April 2020): Increasing in price and decreasing in volume.
Yearly average price: 3,60 EUR/kg (2017), 3,84 EUR/kg (2018), 3,86 EUR/kg (2019).
Yearly consumption: 5.748 tonnes (2017), 4.256 tonnes (2018), 4.646 tonnes (2019).
Short-term trend (January 2020 to April 2020): Increasing in price and decreasing in volume.
Average price: 3,87 EUR/kg.
Average consumption: 541 tonnes.

Figure 46. **RETAIL PRICE AND VOLUME OF FRESH MUSSEL, *MYTILUS* SPP., PURCHASED BY HOUSEHOLDS IN THE NETHERLANDS**



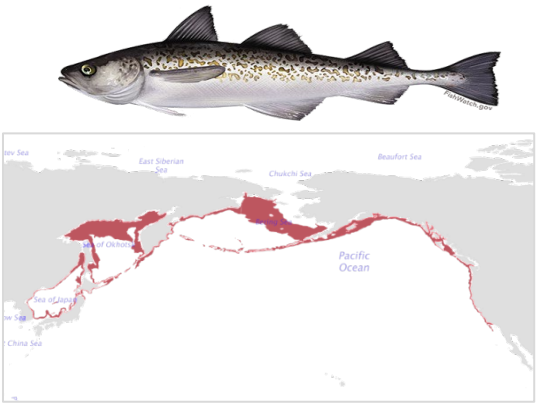
Source: EUMOFA, based on Europanel (updated 22.05.2020.

4. Case study – The EU market for Alaska pollock

4.1. Introduction

Alaska pollock (*Gadus chalcogrammus*), also known as pollock or walleye pollock, is a species of marine whitefish. It is a semi-pelagic schooling fish widely distributed in the North Pacific, and is most abundant in the eastern Bering Sea. Adult fish can be up to 75 cm long and weigh up to 1,5 kg, although on average they are about 20-55 cm long and weigh 180-700 g. Size and weight gradation depend on season and fishing area[25]. Alaska pollock have a relatively short lifespan of about 12 years and begin to reproduce by the age of 3 to 4 years. Each new generation replaces ageing and harvested fish in just a few years, as the species is extremely fertile[26].

In the spring, Alaska pollock migrate inshore to shallow water to breed and feed, and move back to warmer, deeper waters in the winter months. The most common fishing gears used to catch Alaska pollock are trawls and seines[27].

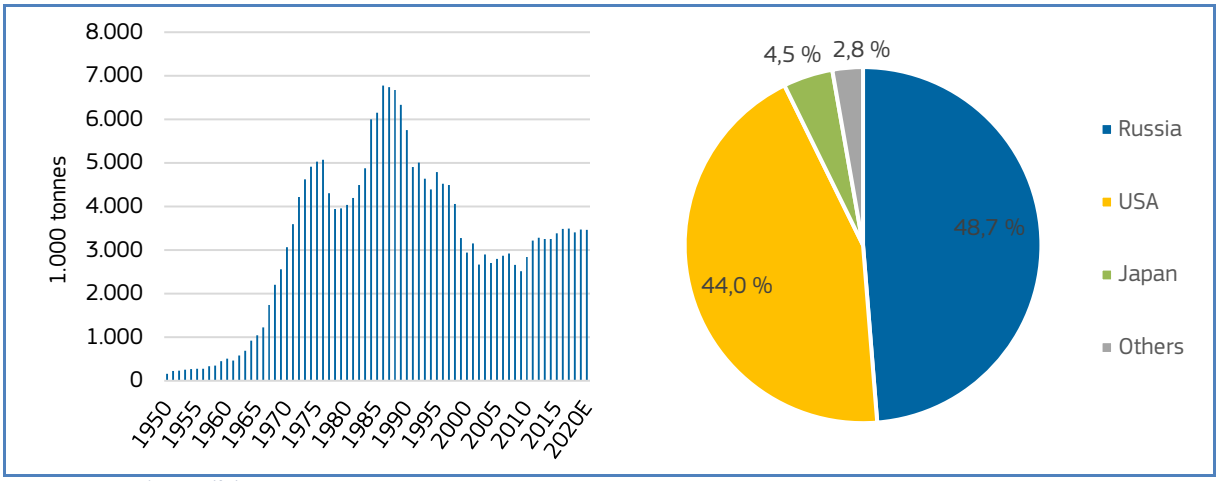


Alaska pollock, source: NOAA Fisheries.
Alaska pollock distribution map, source: FAO.

4.2. Global catches

Alaska pollock fisheries started to pick up pace from moderate volumes in the early 1960s and experienced an immense growth during subsequent decades, primarily caused by fisheries in the North Pacific. The peak years for landed volumes lasted from 1984 to 1989, when catches exceeded 6 million tonnes for five consecutive years. After catches reached 6,7 million tonnes in the mid-1980s, volumes began to decline into the early 2000s and have stabilised in recent years at a level above 3 million tonnes. This is estimated to continue in 2020, as quotas remain stable.

Figure 47. **GLOBAL CATCHES OF ALASKA POLLOCK**



Source: FAO/Kontali/Groundfish Forum.

Catches of Alaska pollock are dominated by the two major fishing nations of this species, Russia and the USA. They account for approx. 92% of all landings of this species in the world. In 2018, Russia caught 1,68 million tonnes (3% less than 2017)

[25] "Walleye Pollock Research". Alaska Fisheries Science Center. NOAA. 2013.
[26] Species directory. Alaska Pollock. NOAA fisheries. https://www.fisheries.noaa.gov/species/alaska-pollock
[27] European Commission. Commercial designations. *Theragra chalcogramma*. https://mare.istc.cnr.it/fisheriesv2/species?lang=en&sn=35947

and the USA caught 1,53 million tonnes (-1%) of Alaska pollock. Total global catches in 2018 accounted to approx. 3,3 million tonnes.

4.3. Global trade of Alaska pollock

Russia is the most significant nation in terms of landed volumes of Alaska pollock, with China as its main exporting market. Most of the exported volume entering the Chinese market is allocated to further processing before being shipped to final consumer markets such as the EU and other East Asian countries. In recent years, Russia has launched an investment program that incentivises the development of its domestic fisheries industry. This has led to an increase in on-board processing of fillets, among other developments, which might lead to a change in Russia's export profile towards consumer markets rather than transition markets.

The USA is the second most significant fishing nation for Alaska pollock and the largest market for its consumption. Of the 1,5 million tonnes landed in 2018, the USA exported approx. 400.000 tonnes. China is an important trading partner for US exports of frozen raw material too, but the USA is less dependent on China as an export market compared to Russia. The USA has a large processing industry that produces fillets and surimi. Frozen Alaska pollock fillets from the USA are mainly exported to the EU market, with the Netherlands and Germany as main entry points. In 2019, the USA exported 107.000 tonnes of frozen Alaska pollock fillets to the EU. A large proportion of US Alaska pollock goes to surimi production, and exports of surimi reached 174.000 tonnes in 2019. The most important export markets for US surimi are Japan and South Korea, together accounting for more than 75% of exports, followed by the EU.

Since 2016, Alaska pollock has been protected as a brand in the USA by the U.S. Food and Drug Administration[28]. This means that pollock caught outside Alaska's exclusive economic zone cannot be labelled as "Alaska pollock" in the USA. Previously, pollock harvested outside of this zone was also labelled as Alaska pollock, but from 2016 can only be labelled as "pollock" in the USA. Globally, the species is mainly labelled as Alaska pollock regardless of its origin.

4.4. Extra-EU imports of Alaska pollock

In 2019, the EU imported 305.000 tonnes (+9% compared to 2018) of Alaska pollock with a total value of EUR 840 million (+38%). This was an all-time-high for imports. Alaska pollock imports are dominated by three major players: the USA and Russia are the most significant suppliers, whilst China is the most important processing country for Alaska pollock destined for the EU market. The Chinese processing industry is supplied by raw material from Russia and the USA, therefore nearly all Alaska pollock entering the EU market is of Russian or US origin.

In 2019, China accounted for 54% of volume imported into the EU and has trended at a market share of around 50% in recent years. The USA had a stable market share of 31%, followed by Russia with 14%, in recent years.

Table 4. **EU IMPORTS OF ALASKA POLLOCK BY SUPPLIER (volume in 1000 tonnes, value in million EUR)[29]**

	2016		2017		2018		2019		Jan - Mar 2020	
Supplier	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
China	156	353	148	309	151	317	165	435	46	135
United States	102	258	106	241	103	238	95	278	30	94
Russian Federation	30	71	34	73	49	108	44	120	10	29
Others	1	3	2	5	2	5	2	5	1	3
Total	**290**	**685**	**291**	**628**	**305**	**668**	**306**	**838**	**87**	**261**

Source: EUMOFA, based on Eurostat-COMEXT.

The first quarter of 2020 saw increased import volumes compared with the first quarter of 2019, up by 2% to 87.000 tonnes, mainly due to increased Russian supply to the EU market. Both Chinese and US supply of Alaska pollock decreased in the first quarter of 2020 by 2% and 3%, respectively. Supply from Russia increased by 55% in the first quarter

[28] https://www.fda.gov/food/cfsan-constituent-updates/alaska-pollock-labelling-faces-new-requirements
[29] The totals in tables regarding EU imports of Alaska pollock are subject to some discrepancy due to rounding of numbers.

of 2020 – this noticeable increase is principally caused by an unusually low supply in the first quarter of the previous year. Although imports from China and the USA declined during the first quarter of 2020, import value increased for all suppliers and total import value increased by 21%, supported by high fillet prices.

Imports of Alaska pollock are heavily dominated by frozen fillets, with only small volumes of other cuts and minimal amounts of frozen whole products. All three of the largest suppliers have well-established processing industries that process the raw material into fillets, with some differences between nations. Russia and the USA are more suited to use and process the raw material in fresh conditions before subsequently freezing the product. China on the other hand is dependent on supplied raw material from Russia and the USA, which arrives frozen and is frozen again after processing. Therefore, most of the fillets supplied by China are presumed to be "double-frozen". As a result, Chinese Alaska pollock products imported into the EU are bought for a somewhat lower price than products imported from Russia or the USA. In 2019, the import price for frozen fillets from China averaged 10% lower than US fillets and 3% lower than Russian fillets.

Table 5. **EU IMPORTS OF ALASKA POLLOCK BY PRESENTATION (volume in 1000 tonnes, value in million EUR)**

	2016		2017		2018		2019		Jan - Mar 2020	
Presentation	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Fillet	268	647	268	592	285	639	284	802	82	252
Whole	2	4	2	3	<0,5	<0,5	<0,5	<0,5	<0,5	<0,5
Other cuts	20	34	21	33	20	29	22	36	5	8
Total	**290**	**685**	**291**	**628**	**305**	**668**	**306**	**838**	**87**	**260**

Source: EUMOFA, based on Eurostat-COMEXT.

In 2019, 93% of the volume of imported Alaska pollock were frozen fillets, accounting for 96% of the total imported value. The price level of frozen fillets increased throughout 2019, with an average import price of 2,82 EUR/kg by the end of the year (+26% over 2018). Prices have continued to surge in the first quarter of 2020, averaging at 3,08 EUR/kg, which represents a 9% increase compared with the end of 2019[30].

The largest EU importer of Alaska pollock has been Germany for some time, which has led the EU in both consumption and production of Alaska pollock products. In recent years German imports have been stable at about 135.000 tonnes, but value has increased in pace with import prices. In 2019, Germany imported 137.000 tonnes for a value of EUR 375 million. This represents a 2% decrease in volume but a 24% increase in value. The EU's second largest importer, France, experienced the same development in 2019 with a 7% decrease in volume but a 13% increase in imported value. Following these two countries, the largest EU importers have been Poland, the United Kingdom and the Netherlands.

Table 6. **EU IMPORTS OF ALASKA POLLOCK BY MEMBER STATE (volume in 1000 tonnes, value in million EUR)[31]**

	2016		2017		2018		2019		Jan - Mar 2020	
Member State	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Germany	135	326	133	286	140	302	137	375	46	140
France	40	98	38	86	43	96	40	109	11	32
Poland	35	71	36	68	38	78	39	101	12	35
United Kingdom[32]	23	56	23	51	27	61	29	83	4	11
Netherlands	24	62	26	63	23	56	27	79	6	18
Denmark	5	15	6	16	7	20	9	30	2	8
Others	28	57	29	58	27	55	25	61	6	16
Total	**290**	**685**	**291**	**628**	**305**	**668**	**306**	**838**	**87**	**260**

Source: EUMOFA, based on Eurostat-COMEXT.

[30] For the latest price trends on frozen Alaska pollock fillets imported to the EU market from China, see figure 34 in the Extra-EU imports section.
[31] The totals in tables regarding EU imports of Alaska pollock are subject to some discrepancy due to rounding of numbers.
[32] United Kingdom is no longer a Member State of the EU as of February 2020 but it is included in relevant tables and graphs for context. Note that all 2020-figures for the United Kingdom contain only figures for January 2020.

4.5. Intra-EU trade[33] of Alaska pollock

Alaska pollock is the second most processed species in the EU, after Atlantic cod[34]. It is important in the production of fish fingers, surimi, breaded products, and prepared meals. Germany is the largest market for Alaska pollock, and is also the largest intra-EU exporter of the species. Large parts of the trade involve raw material imports to serve the processing industry and exports of processed products. France is the largest intra-EU importer of Alaska pollock, and is also one of the most important producers of surimi in the EU, with an estimated production of 52.000 tonnes in 2018[35]. Other large intra-EU importers and exporters are mostly transition hubs for Alaska pollock products headed towards final consumer markets (the Netherlands and Poland, for instance).

Table 7. **INTRA-EU EXPORTS OF ALASKA POLLOCK BY MEMBER STATE (volume in 1000 tonnes, value in million EUR)**

	2016		2017		2018		2019		Jan - Mar 2020	
Destination	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Germany	31	87	37	92	37	91	31	92	8	28
Netherlands	19	49	31	74	32	81	24	71	4	14
Poland	5	15	5	15	7	19	6	21	1	5
Belgium	3	9	3	8	2	7	3	12	1	4
France	<0,5	1	3	9	3	10	3	11	1	3
United Kingdom[36]	1	4	1	4	1	4	1	4	<0,5	1
Others	3	8	3	9	3	9	4	11	1	3
Total	**62**	**173**	**83**	**211**	**85**	**221**	**72**	**222**	**16**	**58**

Source: EUMOFA, based on Eurostat.

Intra-EU exports of Alaska pollock are dominated by Germany, the largest producer of Alaska pollock products, and by the Netherlands, which in many cases operates as a transition hub for Alaska pollock entering the EU market before it is exported to the final market. These two countries accounted for 75% of all intra-EU exports in 2019. Germany exported 31.000 tonnes (-16% over 2018) for EUR 92 million (+2%) and the Netherlands exported 24.000 tonnes (-25%) for EUR 71 million (-12%) to other EU member states in 2019.

[33] For the analysis of intra-EU trade, only export flows have been considered. In reality, intra-EU trade flows as reported by Eurostat cover both arrivals (i.e. imports) and dispatches (i.e. exports). Because of different valuation principles (CIF > FOB)[33], arrivals should be slightly higher valued than dispatches. This is one of the main reasons for asymmetries between import and export figures. In general, bilateral comparisons between MS of intra-EU flows have revealed major and persistent discrepancies. Therefore, comparisons dealing with intra-EU trade statistics and related results must be treated cautiously and should consider the existence of these discrepancies.

[34] EUMOFA. The EU fish market – 2019 edition.

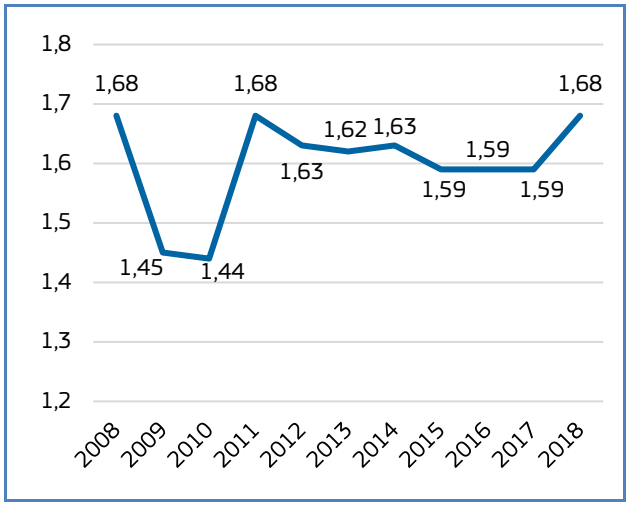
[35] EUMOFA species profile: Alaska pollock - https://www.eumofa.eu/documents/20178/137160/Alaska+pollock_31-1.pdf

[36] United Kingdom is no longer a Member State of the EU as of February 2020 but it is included in relevant tables and graphs for context. Note that all 2020-figures for the United Kingdom contain only figures for January 2020.

4.6. Consumption in the EU

Alaska pollock is the fourth most consumed species in the EU after tuna, salmon and cod. In 2018, the apparent consumption per capita was estimated as 1,68 kg (live weight). Consumption levels have been stable since 2011 at around 1,6 kg (live weight) per capita. Consumption dipped in 2009 and 2010, mainly due to considerably lower available quotas for the US Alaska pollock fisheries. After the availability of the species returned to normal, consumption trends followed and stabilised at the level seen today.

Figure 48. **APPARENT CONSUMTION OF ALASKA POLLOCK IN THE EU (kg in live weight per capita)**



Source: EUMOFA.

Germany is the largest consumer market in the EU, and has for many years been an important market for processing of the species. France, together with Poland and the United Kingdom, are also important markets for the consumption of Alaska pollock in the EU.

Consumption of Alaska pollock in the EU is mainly of fillet products such as breaded and battered fish, produced from high-quality raw material. Lower quality raw material is often used to produce low-cost breaded and battered fish sticks and other products that are offered in EU markets. Alaska pollock is commonly used in the fast food industry worldwide, including within the EU. In addition, frozen Alaska pollock is considered a premium raw material for surimi production, a product consumed in parts of the EU.

5. Case study – The fisheries and aquaculture products market in the Republic of Korea

5.1. Introduction

The Republic of Korea (South Korea) is a country in East Asia, constituting the southern part of the Korean Peninsula, and covering a total area of 100.000 km^2. South Korea is mostly surrounded by water and has 2.413 kilometres of coastline bordering three seas. To the west is the Yellow Sea, to the south is the East China Sea, and to the east is the Sea of Japan. In South Korea, these are often referred to as the West, South and East Seas, respectively. In 2016, South Korea's population was estimated to be around 50,8 million. Endowed with an abundance of fisheries resources, Koreans have developed a distinct seafood culture[37].

Domestic consumption of seafood was estimated to reach 5,23 million tonnes in 2019. Thus, South Korea's per capita consumption of seafood is among the highest in the world, at almost 70 kilograms a year[38]. Catches are decreasing but this is offset by soaring production and consumption of seaweed products.

Source: World Factbook.

5.2. Fisheries production

In 2018, total capture fisheries production reached around 1,35 million tonnes, mostly from marine resources. Tuna and tuna-like species accounted for 28% of total catches (mostly skipjack and yellowfin tuna). Small pelagics (16%) and miscellaneous pelagic fish (14%) were the other most important species groups. The volume of Korean catches has experienced a significant decreasing trend over the past decade (-28% between 2009 and 2018), mostly due to cephalopods (-71%), small pelagics (-10%), demersal fish (-37%), and coastal fish (-47%)[39].

Table 8. **KOREAN CATCHES BY MAIN SPECIES GROUPS (volume in tonnes)**

Product	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Tuna, bonito, billfish	376.422	364.344	283.260	347.426	311.543	363.409	374.098	397.965	337.208	378.780
Herring, sardine, anchovy	247.375	276.489	320.536	260.580	260.061	254.739	249.081	175.029	253.351	221.660
Miscellaneous pelagic fish	201.840	174.882	228.799	198.313	183.838	203.190	216.208	222.177	165.862	192.752
Squid, cuttlefish, octopus	313.469	256.652	269.059	292.475	281.487	356.246	334.223	167.951	165.037	91.542
Miscellaneous demersal fish	142.823	114.295	91.758	89.894	99.082	95.452	91.458	86.675	98.339	90.692
Miscellaneous coastal fish	114.080	111.484	132.849	96.572	95.161	77.057	70.475	56.928	51.126	60.308
Crabs, sea-spiders	73.314	75.432	69.813	73.340	76.421	71.857	65.950	56.284	50.210	43.823
Clams, cockles, arkshells	45.259	33.572	27.492	21.290	21.798	21.362	23.192	19.886	24.048	38.944
Oysters	24.254	22.686	24.985	18.424	12.751	19.794	21.484	14.076	14.539	38.341

[37] https://ec.europa.eu/jrc/en/news/how-much-fish-do-we-consume-first-global-seafood-consumption-footprint-published
[38] Korea Rural Economy Institute (KREI) 2017 Food Balance Sheet, KMI Fishery Outlook 2020.
[39] FAO.

Others	333.068	305.164	308.568	278.957	261.209	291.106	211.462	173.524	202.071	187.945
Total	1.871.904	1.735.000	1.757.119	1.677.271	1.603.351	1.754.212	1.657.631	1.370.495	1.361.791	1.344.787

Source: FAO.

5.3. Aquaculture production

In 2018, total Korean aquaculture production reached around 2,28 million tonnes, mostly from marine aquaculture. Seaweed accounted for three quarters of total production volume: mostly Japanese kelp, nori and wakame. The second most important species group farmed in Korea was molluscs, dominated by the Pacific cupped oyster (72%). They were followed by marine fishes, with 80.000 tonnes produced in 2018, mostly bastard halibut (also called olive flounder) and Korean rockfish. Diadromous fishes, freshwater fishes and crustaceans accounted for only a very small share of the production[40].

Over the 2009–2018 period, the volume of Korean aquaculture production has experienced a significant increasing trend, mostly due to seaweeds and oysters, whereas production of marine fishes has declined.

Table 9. **KOREAN AQUACULTURE PRODUCTION BY MAIN SPECIES GROUPS (volume in tonnes)**

Product	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Aquatic plants	858.659	901.672	992.283	1.022.326	1.131.305	1.087.048	1.197.125	1.351.258	1.761.525	1.710.500
Molluscs	329.298	359.784	394.502	373.488	293.773	359.292	338.115	361.706	430.397	417.644
Marine fishes	109.507	80.133	72.333	76.210	73.036	83.318	85.251	79.755	86.114	80.145
Miscellaneous aquatic animals	16.438	15.014	19.165	17.672	16.161	15.906	30.558	39.314	28.324	43.326
Diadromous fishes	9.440	10.602	10.372	7.494	8.678	9.117	12.323	13.342	14.938	14.450
Freshwater fishes	6.458	7.271	7.807	9.198	6.645	8.221	7.547	8.027	8.235	8.260
Crustaceans	1.919	2.757	2.873	2.838	3.848	4.540	5.566	5.818	5.186	4.525
Total	1.331.719	1.377.233	1.499.335	1.509.226	1.533.446	1.567.442	1.676.485	1.859.220	2.334.719	2.278.850

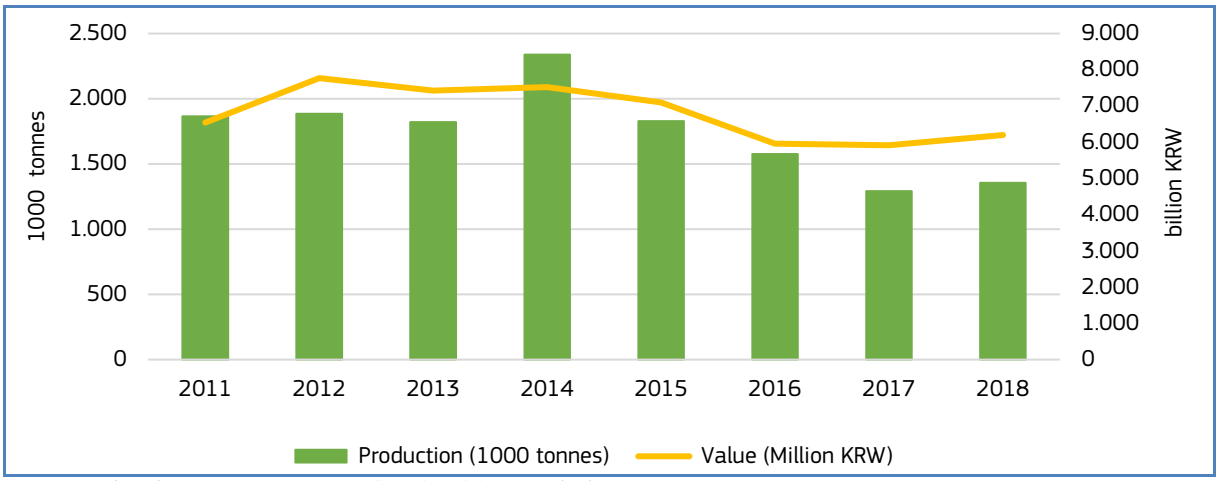
Source: FAO.

5.4. Processing

Korean processed seafood products totalled 1,36 million tonnes in 2018, up 5,4% from 2017. However, this is still well below the production levels recorded just a few years previously, as there has been a decline in demand from the institutional and food service sectors. Seafood processors also face higher production costs due to minimum wage increases and higher raw material costs[41].

[40] FAO.
[41] United States – Department of Agriculture (https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Korea%20Seafood%20Market%20Update%202020_Seoul%20ATO_Korea%20-%20Republic%20of_05-26-2020).

Figure 49. **PROCESSED SEAFOOD PRODUCTION IN SOUTH KOREA**



Source: USDA based on Korea Statistics Service (http://kosis.kr) – nominal values.

5.5. Imports and Exports

Despite high levels of production in both the fisheries and aquaculture sectors, the Korean trade deficit is significantly high and has followed an increasing trend over the last 5 years. It reached EUR 3 billion in 2019.

Table 10. **KOREAN TRADE BALANCE FOR FISHERIES AND AQUACULTURE PRODUCTS (value in million EUR)**

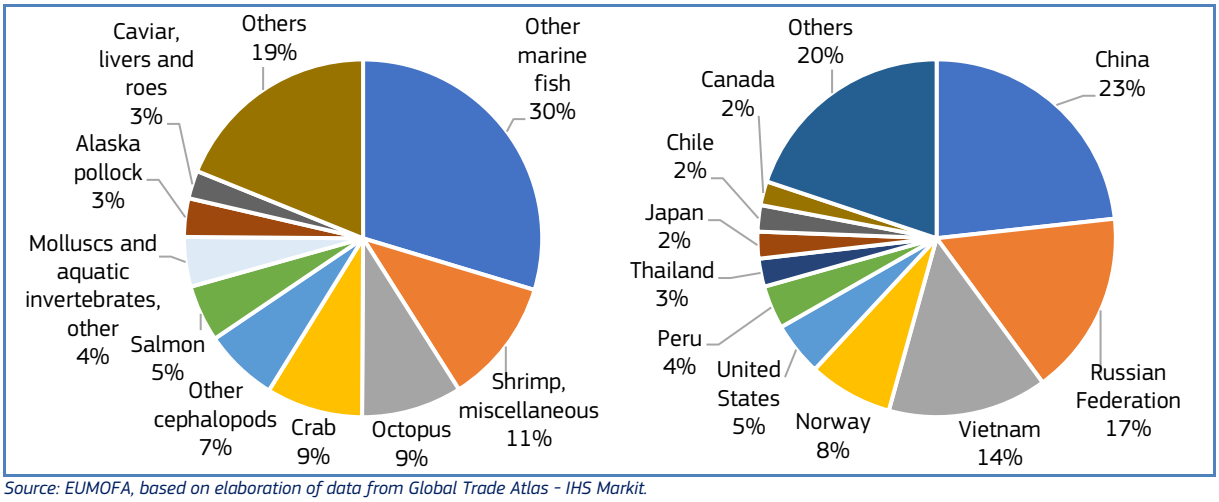
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Imports	2.371	2.773	2.869	2.688	3.198	3.911	4.099	4.447	4.922	4.953
Exports	1.204	1.449	1.687	1.451	1.378	1.504	1.676	1.762	1.699	1.862
Balance	-1.167	-1.324	-1.182	-1.237	-1.820	-2.407	-2.423	-2.684	-3.223	-3.090

Source: EUMOFA, based on elaboration of data from Global Trade Atlas - IHS Markit.

In 2019, Korean imports of FAPs (fisheries and aquaculture products) amounted to 1,5 million tonnes, with a value of almost EUR 5 billion. In value terms, frozen products accounted for 58% of total imports, followed by live/fresh products (20%) and prepared/preserved products (12%). The main commercial species imported were other marine fish[42] (30% of total value), miscellaneous shrimps (11%), octopus and crab (9% each). The main countries of origin in terms of value were China (23%, mostly other marine fish and cephalopods), Russia (17%, mostly crab and Alaska pollock), Vietnam (14%, dominated by miscellaneous shrimps), Norway (14%) and the USA (5%, dominated by Alaska pollock).

[42] "Other marine fish" is an EUMOFA aggregation of several species of lesser commercial importance at EU level.

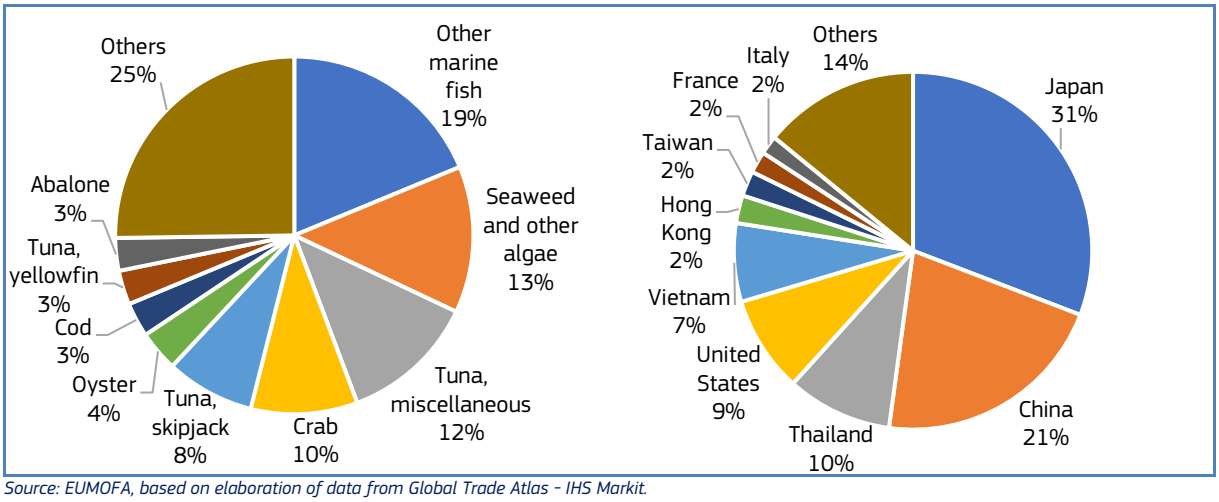
Figure 50. **MAIN COMMERCIAL SPECIES (LEFT) AND MAIN ORIGINS (RIGHT) OF KOREAN IMPORTS IN 2019 IN TERMS OF VALUE**



Source: EUMOFA, based on elaboration of data from Global Trade Atlas - IHS Markit.

Korean exports of FAPs in 2019 reached 623.894 tonnes, with a value of EUR 1,9 billion. In value terms, frozen products accounted for 53% of total exports, followed by products in unspecified preservation state (18%), live/fresh products (18%) and prepared/preserved products (11%). The main commercial species exported were other marine fish (19% of total export value), seaweed and other algae (13%), miscellaneous tuna (12%) and crab (10%). The main destinations in value terms were Japan (31%, mostly miscellaneous tunas, other marine fish and seaweed), China (21%, dominated by other marine fish, crab, cod and seaweed), Thailand (10%, mostly skipjack tuna and seaweed) and the USA (9%, dominated by other marine fish and toothfish).

Figure 51. **MAIN COMMERCIAL SPECIES (LEFT) AND MAIN DESTINATIONS (RIGHT) OF KOREAN EXPORTS IN 2019 IN TERMS OF VALUE**



Source: EUMOFA, based on elaboration of data from Global Trade Atlas - IHS Markit.

5.6. Trade with the EU

South Korea is not among the EU's major partners for fisheries and aquaculture products. The EU trade balance with Korea in value terms has been relatively equal over the last decade, although progressively going from deficit to positive balance, with the profit from EU exports minus cost of imports reaching EUR 30 million in 2019.

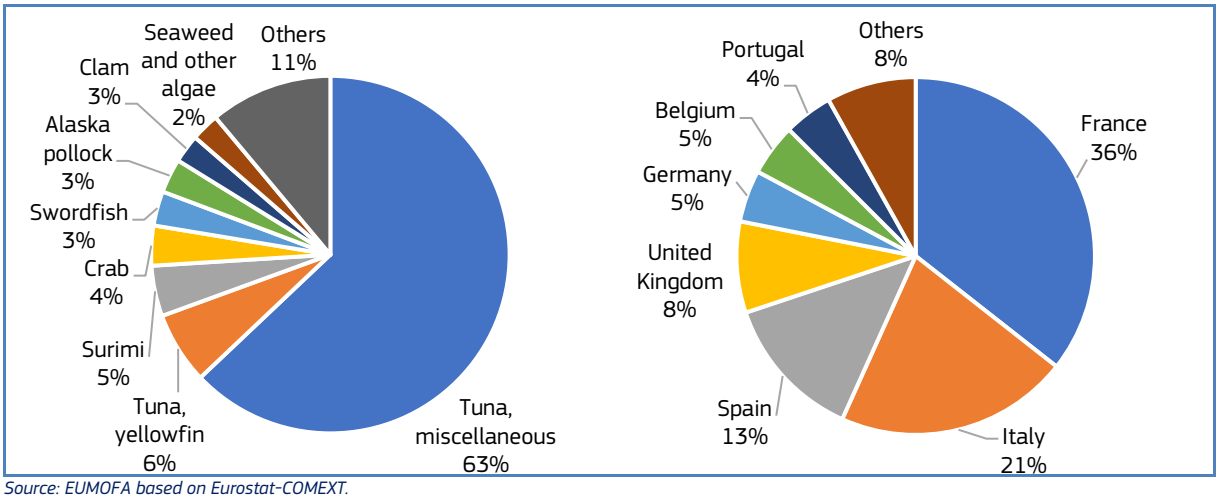
Table 11. **EU TRADE BALANCE WITH SOUTH KOREA FOR FISH AND SEAFOOD (value in million EUR)**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Exports to South Korea	48	46	59	69	76	114	124	158	127	144
Imports into the EU	86	75	79	63	84	103	125	144	125	115
Balance	-38	-30	-20	6	-8	11	-1	13	2	30

Source: EUMOFA based on Eurostat-COMEXT.

In 2019, EU imports from South Korea amounted to 16.686 tonnes, reaching a value of EUR 115 million. In value terms, frozen products accounted for 84% of total imports, followed by prepared/preserved products (13%). Miscellaneous tuna products dominated imports into the EU (63% of total value). The main destinations in value terms were France (36%, mostly miscellaneous tuna), Italy (21%, mostly miscellaneous tuna), Spain (13%, dominated by yellowfin tuna), and UK (8%, dominated by miscellaneous tuna).

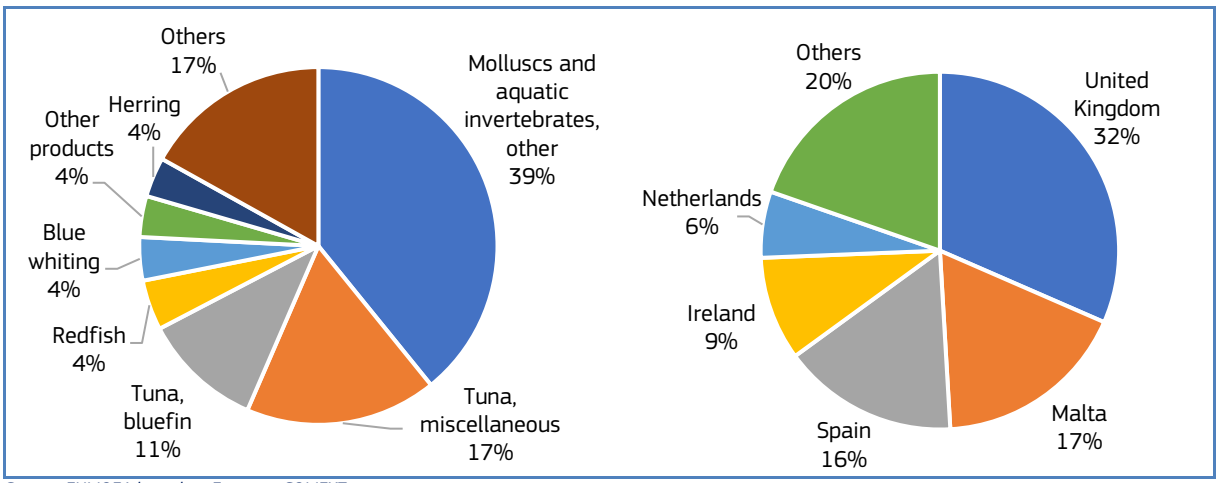
Figure 52. **MAIN COMMERCIAL SPECIES (LEFT) AND MAIN DESTINATIONS (RIGHT) OF EU IMPORTS FROM KOREA IN 2019 IN TERMS OF VALUE**



Source: EUMOFA based on Eurostat-COMEXT.

The same year, EU exports to South Korea reached 50.398 tonnes with a value of EUR 144 million. In value terms, frozen products accounted for 57% of total exports, followed by prepared/preserved products (30%) and live/fresh products (18%). The main commercial species exported were other molluscs and aquatic invertebrates (39% of total export value), miscellaneous tuna (17%), and bluefin tuna (11%). The main origins in value terms were the UK (32%, mostly other molluscs), Malta (17%, mostly bluefin and miscellaneous tuna), Spain (16%, mostly miscellaneous tuna) and Ireland (9%, dominated by other molluscs).

Figure 53. **MAIN COMMERCIAL SPECIES (LEFT) AND MAIN ORIGINS (RIGHT) OF EU EXPORTS TO KOREA IN 2019 IN TERMS OF VALUE**



Source: EUMOFA based on Eurostat-COMEXT.

5.7. Consumption

Despite declining production, however offset by increased imports, Korean seafood consumption has continued to grow in recent years, particularly thanks to communication efforts by the Korean seafood industry to promote seafood as a healthy alternative to red meat. The self-sufficiency rate was estimated at 73,8% in 2019, up by 10% compared to 2016 but down by 3% compared to 2013[43]. Seafood businesses have also worked to diversify fish products, improve quality, and research

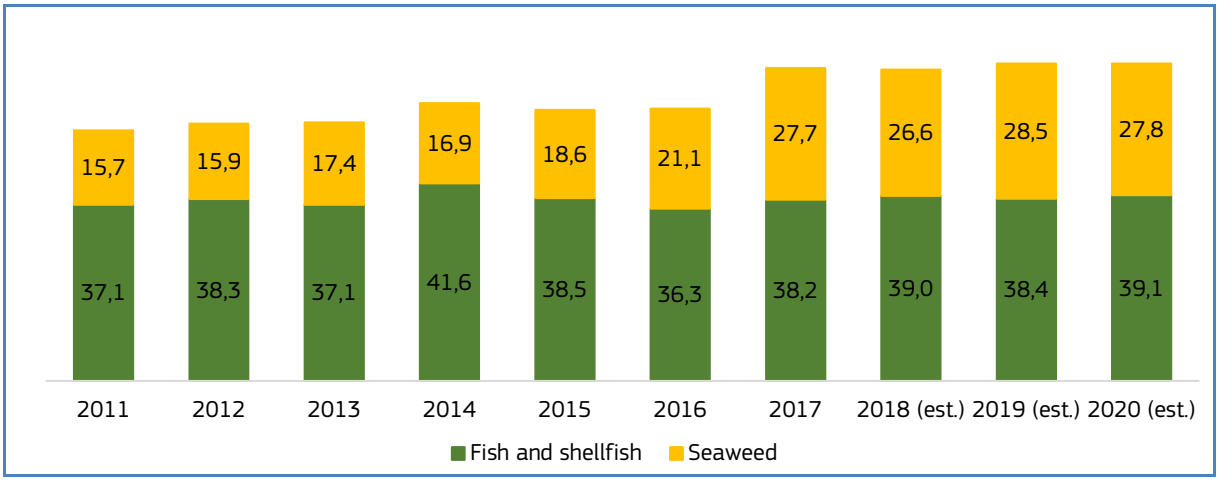
[43] Korean Fisheries Yearbook 2019, KMI Fishery Outlook 2020.

new processing technologies. The major seafood species consumed in Korea are shrimp, anchovy, squid, Alaska pollock, mackerel, tuna, hairtail, flat fish, oyster and octopus. The most important factors for Korean consumers are freshness, origin, taste, cost, and food safety. Total domestic consumption of seafood was estimated at 5,23 million tonnes in 2019, with close to 74% of products coming from domestic markets thanks to the increase in aquaculture production.

Demand for precooked, prepared and preserved foods has been growing quickly. This includes processed ready-to-eat seafood products and prepared meals incorporating seafood ingredients. The trend has been driven by a steady rise in the labour participation rate for women and the growing number of single-person households[44].

Per capita fish and shellfish consumption in South Korea has remained steady over the last decade despite declining consumption by young people. In contrast, per capita seaweed consumption has nearly doubled over the last decade. As a result, the Korean fish and seafood per capita total annual consumption is estimated around 70 kg. The Korean population eats fresh, chilled and frozen fish, in that order of preference. Some fish are consumed raw ("Hoi", or "sashimi"), and reach a price premium.

Figure 54. **KOREAN ANNUAL PER CAPITA CONSUMPTION OF SEAFOOD PRODUCTS (volume in kg)**



Source: Korea Rural Economy Institute (KREI) 2017 Food Balance Sheet, KMI Fishery Outlook 2020.

[44] United States – Department of Agriculture
(https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Korea%20Seafood%20Market%20Update%202020_Seoul%20ATO_Korea%20-%20Republic%20of_05-26-2020)

6. Global highlights

EU / Sustainability: The European Commission has adopted a Farm to Fork Strategy for a fair, healthy, and environmentally friendly food system as well as a Biodiversity Strategy to introduce nature to daily life. The strategies are mutually reinforcing, bringing together nature, fishers, farmers, business, and consumers to jointly work towards a competitively sustainable future in line with the European Green Deal. A number of measures, including financial instruments, will be available to support European fishers and aquaculture producers in driving the necessary transition[45].

EU / EMFF: The European Commission increased the European Maritime and Fisheries Fund (EMFF) by EUR 500 million. The additional funding is part of the Recovery Package in response to the COVID-19 pandemic and follows earlier EU support measures to alleviate the immediate socio-economic impact on the sector. This is an increase of more than 8% from the budget initially proposed for the EMFF in 2018. The additional funds will support Member States' programmes for 2021-2024, frontloading financial support in the crucial first years of recovery[46].

EU / Blue economy: The European Commission published *The EU Blue Economy Report 2020*, which provides an overview of the performance of the EU economic sectors in terms of oceans and the coastal environment. With a turnover of EUR 750 billion in 2018, the EU blue economy is deemed to be in good health. There were also 5 million people working in the blue economy sector in 2018, representing a significant increase of 11,6% relative to the previous year[47].

France / COVID-19: In France, e-commerce in the form of click-and-collect and home-delivery has grown rapidly. According to a study published by Nielsen, approximately 1,2 million homes ordered groceries online during the first week of restrictions. Furthermore, French consumers are opting for more fresh foods, including fisheries and aquaculture products, in their click-and-collect baskets than they would when shopping in traditional supermarkets. Unsurprisingly, 51% of French respondents said in a study they are eating more at home[48].

Germany / Supply / COVID-19: In Germany, the consumption of frozen fish and seafood has been increasing. From February to May 2020 sales of frozen fish products in the food retail sector grew significantly compared the same period of 2019. The highest peaks represented increase of 50% and 80%. Plaice fillets, fish fingers, fried fish, and gourmet fillets were the most-consumed frozen fish products[49].

OECD / **COVID-19**: The Organisation for Economic Co-operation and Development (OECD) published policy responses on a range of topics, including the fisheries and aquaculture sector, to address the emerging health, economic, and societal crisis, to facilitate coordination, and to contribute to necessary global action in response to COVID-19. This policy brings together on the short-term relief measures for impacted sectors, as well as a specific focus on fisheries and aquaculture. The document also provides an analysis of the longer-term consequences and impacts of the pandemic, paving the way for recovery with an internationally co-ordinated policy response[50].

FAO/ World / Supply: The estimates for global fish production in 2019 suggest that the total annual output of fisheries will decrease by 1,2%. The early closure of the second anchoveta season, reduced catch of cephalopods, and limited supply of certain groundfish species all contributed to the fall in levels of wild catch. Meanwhile, the aquaculture sector registered another year of growth, with total harvests increasing by an estimated 3%. Due to the overall decline in fish supply, however, per capita fish consumption fell marginally last year, to around 20,4 kg per capita per year[51].

[45] https://ec.europa.eu/fisheries/press/towards-sustainable-eu-food-system_en
[46] https://ec.europa.eu/fisheries/press/eu-tops-fisheries-fund-%E2%82%AC500-million-help-recovery_en
[47] https://ec.europa.eu/commission/presscorner/detail/en/ip_20_986
[48] https://www.nielsen.com/eu/en/insights/article/2020/COVID-19-tracking-the-impact-on-fmcg-and-retail/
[49] https://www.lifepr.de/pressemitteilung/marine-stewardship-council/Fisch-aus-der-Tiefkuehltruhe-boomt-bis-zu-80-mehr-Umsatz-als-im-Vorjahr/boxid/800002
[50] http://www.oecd.org/coronavirus/policy-responses/fisheries-aquaculture-and-covid-19-issues-and-policy-responses-a2aa15de/#section-d1e33
[51] http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1271712/

7. Macroeconomic Context

7.1. Marine fuel

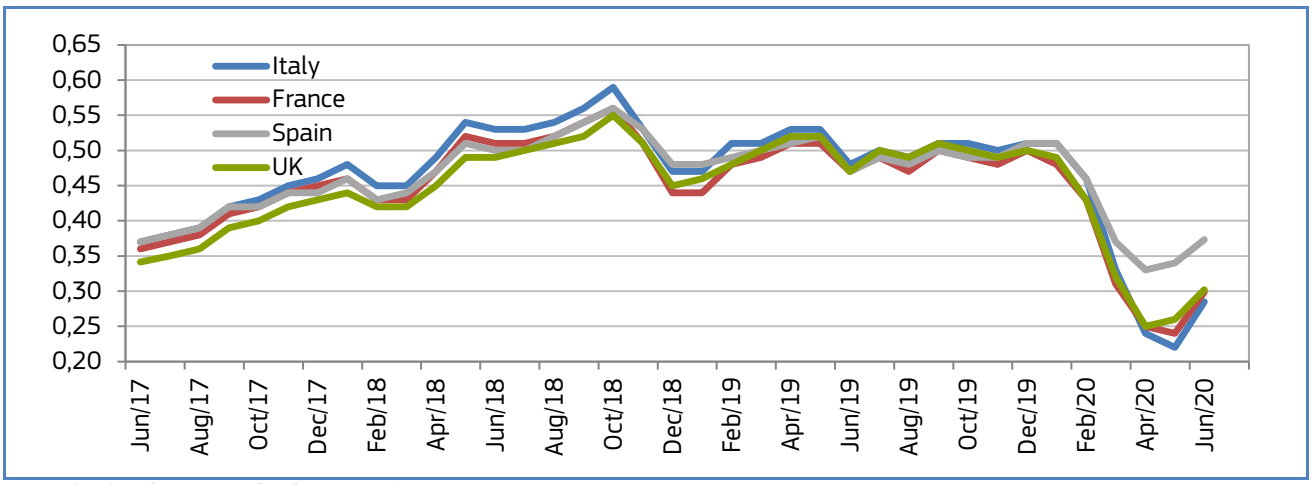
Average prices for marine fuel in **June 2020** ranged between 0,29 and 0,37 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices increased about 19% compared with the previous month but decreased 33% compared with the same month in 2019.

Table 12. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Jun 2020	Change from May 2020	Change from Jun 2019
France *(ports of Lorient and Boulogne)*	0,30	25%	-36%
Italy *(ports of Ancona and Livorno)*	0,29	30%	-41%
Spain *(ports of A Coruña and Vigo)*	0,37	10%	-21%
The UK (ports of Grimsby and Aberdeen)	0,30	16%	-36%

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

Figure 55. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

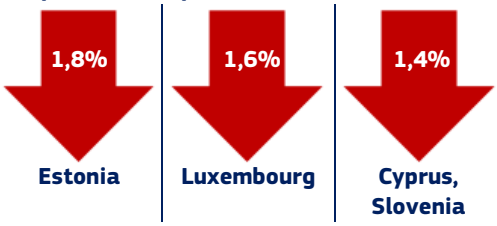


Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

7.2. Consumer prices

The EU annual inflation rate was at 0,6% in May 2020, down from 0,7% in April. A year earlier, the rate was 1,6%.

Inflation: lowest rates in May 2020, compared with April 2020.



Inflation: highest rates in May 2020, compared with April 2020.

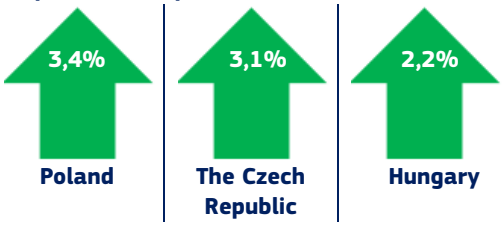


Table 13. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

HICP	May 2018	May 2019	Apr 2020	May 2020	Change from Apr 2020		Change from May 2019	
Food and non-alcoholic beverages	104,88	106,87	110,74	111,01	↑	0,2%	↑	3,9%
Fish and seafood	108,76	110,85	114,91	113,74	↓	1,0%	↑	2,6%

Source: Eurostat.

7.3. Exchange rates

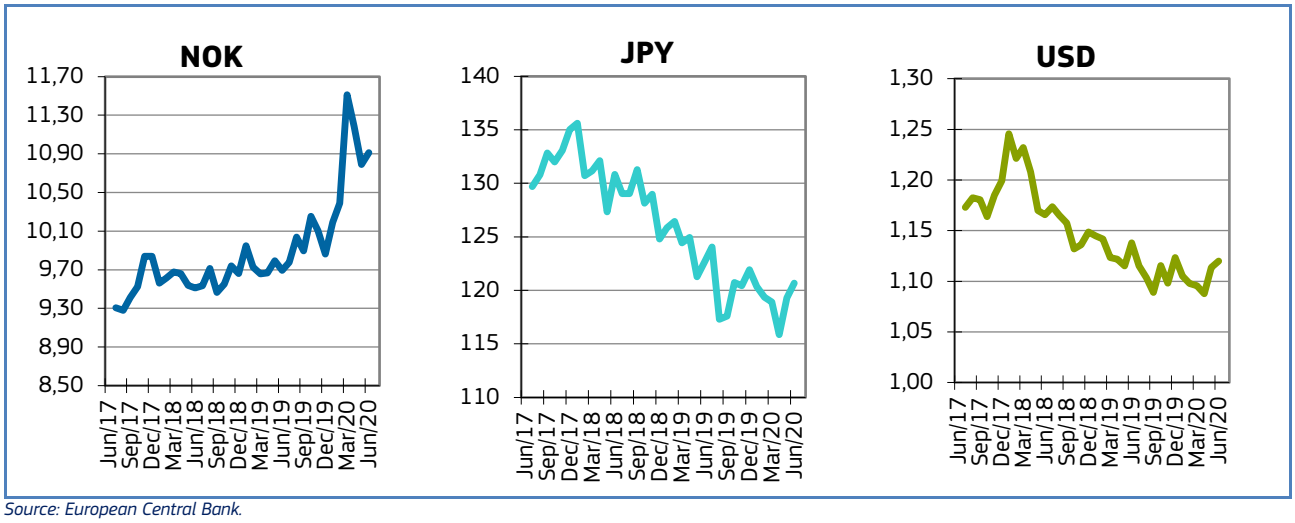
Table 14. **EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Jun 2018	Jun 2019	May 2020	Jun 2020
NOK	9,5115	9,6938	10,7880	10,9120
JPY	129,04	122,60	119,29	120,66
USD	1,1658	1,1380	1,1136	1,1198

Source: European Central Bank.

In June 2020, the euro appreciated against the Japanese yen and the Norwegian krone (both +1,1%), and the US dollar (+0,1%) relative to the previous month. For the past six months, the euro has fluctuated around 1,10 against the US dollar. Compared with June 2019, the euro has depreciated 1,6% against the Japanese yen, but it appreciated 12,6% against the Norwegian krone and 0,6% against the US dollar.

Figure 56. **TREND OF EURO EXCHANGE RATES**



Source: European Central Bank.

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

First sales: The Council of European Union, DG-Mare European Commission, Traffic.org, CITES, Journal of Fish Biology, Orbit.dtu.dk, NOBANIS.org, Latvian Fisheries Yearbook 2016.

Consumption: EUROPANEL.

Case studies: NOAA Fisheries, FAO, Kontali, Groundfish Forum, European Commission, Lonely Planet, Korea Rural Economy Institute (KREI), United States Department of Agriculture, (USDA), Korea Statistics Service.

Global highlights: DG-Mare European Commission, FAO, OECD, Lifepr.de, Nielsen.com

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].

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