

Monthly Highlights

No. 9 / 2020

E U M O F A

European Market Observatory for
Fisheries and Aquaculture Products

In this issue

According to data collected by EUMOFA from 12 EU Member States, European whitefish and sea trout together accounted for 28% of the total first-sales value of the salmonids' commodity group in July 2020.

Average prices of fresh whole Atlantic salmon imported from Norway and frozen tropical shrimp from Ecuador have been experiencing a downward trend since 2017.

Over the past three years, household consumption of fresh halibut in Denmark was nearly 50% higher than that of Sweden.

In 2019, EU imports of fisheries and aquaculture products from Peru amounted to roughly 197.000 tonnes dominated by cephalopods, fishmeal and fish oil.

EU catches of albacore tuna amounted to 28.152 tonnes in 2018, providing approximately 12% of the world supply.

The European Commission adopted a proposal for fishing opportunities in 2021 in the Mediterranean and Black Seas.



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1. First sales in Europe

During **January–July 2020**, 12 EU Member States (MS), Norway, and the United Kingdom reported first-sales data for 10 commodity groups¹. First-sales data are based on sales notes and data collected from auction markets. First sales data analysed in the section “*First sales in Europe*” are extracted from EUMOFA².

1.1. January–July 2020 compared to the same period last year

Increases in value and volume: None of the analysed countries recorded a first sales increase in both value and volume.

Decreases in value and volume: Belgium, Denmark, France, Italy, Latvia, Poland, Portugal, and Sweden recorded decreases in first sales. Sweden stood out with the highest decrease in first-sales volume due to a lower supply of small pelagics (mainly herring and sprat). Lower value of Norway lobster and cod and lower sales of herring were the main factors behind decreases in Denmark. In Poland, lower sales of cod, herring, sprat, and European flounder were behind the overall negative trend in first sales.

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

Country	January–July 2018		January–July 2019		January–July 2020		Change from January–July 2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	7.968	34,69	7.602	32,91	6.786	32,16	-11%	-2%
Denmark	121.099	184,78	114.640	165,71	82.809	124,30	-28%	-25%
Estonia	30.708	7,11	34.232	7,38	33.950	8,94	-1%	21%
France	110.339	365,33	104.675	353,56	87.604	290,80	-16%	-18%
Italy**	56.351	212,37	55.628	221,74	48.479	182,08	-13%	-18%
Latvia	23.918	4,55	31.091	5,25	24.035	4,82	-23%	-8%
Lithuania	1.182	0,91	707	0,56	1.095	0,51	55%	-8%
Netherlands	207.906	305,26	133.405	208,92	141.878	204,55	6%	-2%
Norway	1.994.974	1.504,24	1.620.629	1.367,41	1.705.044	1.272,70	5%	-7%
Poland	64.509	19,52	71.004	19,27	50.457	11,67	-29%	-39%
Portugal	58.452	143,37	64.309	154,73	50.347	127,52	-22%	-18%
Spain	282.176	788,52	289.156	821,93	294.614	805,36	2%	-2%
Sweden	140.017	58,55	121.148	52,95	78.984	43,28	-35%	-18%
UK	135.460	253,09	148.233	328,86	152.750	254,99	3%	-22%

Possible discrepancies in % changes are due to rounding.

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

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

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

² First sales data updated on 21.09.2020.

1.2. In July 2020 compared to last year

Increases in value and volume: First sales increased in Estonia, the Netherlands, and Spain. Higher sales of European perch, pike-perch, and vendace were behind the sharp increase in Estonia, while herring was the main species responsible for growth in the Netherlands.

Decreases in value and volume: First sales declined in Belgium, Denmark, France, Italy, Latvia, Lithuania, Norway, Poland, Portugal, and Sweden. The highest decrease was observed in Poland and was caused by reduced fishing opportunities for cod and herring in the Baltic Sea³.

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

Country	July 2018		July 2019		July 2020		Change from July 2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	917	4,73	1.120	5,24	1.048	5,20	-6%	-1%
Denmark	11.503	22,74	10.999	21,40	10.368	19,06	-6%	-11%
Estonia	87	0,21	77	0,18	217	0,41	182%	129%
France	16.487	51,29	14.855	51,27	14.647	48,91	-1%	-5%
Italy**	10.300	35,85	11.005	41,05	10.281	37,60	-7%	-8%
Latvia	855	0,14	2.539	0,38	1.404	0,22	-45%	-41%
Lithuania	10	0,01	5	0,01	4	0,01	-17%	-1%
Netherlands	29.540	46,26	12.395	21,52	25.581	37,85	106%	76%
Norway	130.265	128,63	157.290	151,67	109.493	84,45	-30%	-44%
Poland	2.430	1,05	1.529	0,89	70	0,09	-95%	-90%
Portugal	15.042	30,90	17.230	31,06	12.589	25,88	-27%	-17%
Spain	51.473	142,13	51.211	146,19	52.091	155,93	2%	7%
Sweden	2.247	5,10	899	4,59	599	4,22	-33%	-8%
UK	23.422	42,12	21.319	52,86	22.223	38,39	4%	-27%

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 42 of 2020**) are available via the EUMOFA website, and can be accessed [here](#).

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

³ <https://www.consilium.europa.eu/en/policies/eu-fish-stocks/tacs-and-fishing-opportunities/>

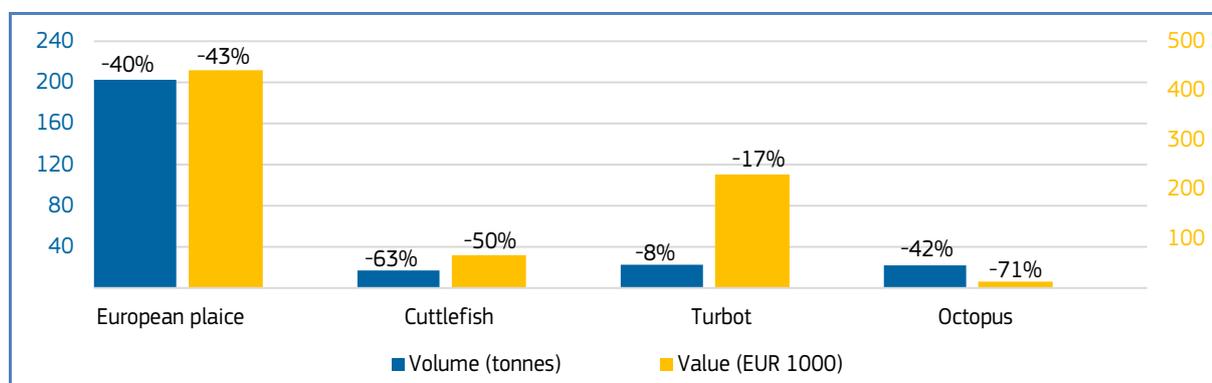
1.3. First sales in selected countries

First sales data analysed in this section are extracted from EUMOFA⁴.

Table 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES⁵ IN BELGIUM**

 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
January-July 2020 vs January-July 2019	EUR 32,2 million, -2%	6.7856 tonnes, -11%	European plaice, turbot, other sole, gurnard, shrimp <i>Crangon</i> spp.
July 2020 vs July 2019	EUR 5,2 million, -1%	1.048 tonnes, -6%	European plaice, cuttlefish, turbot, octopus.

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

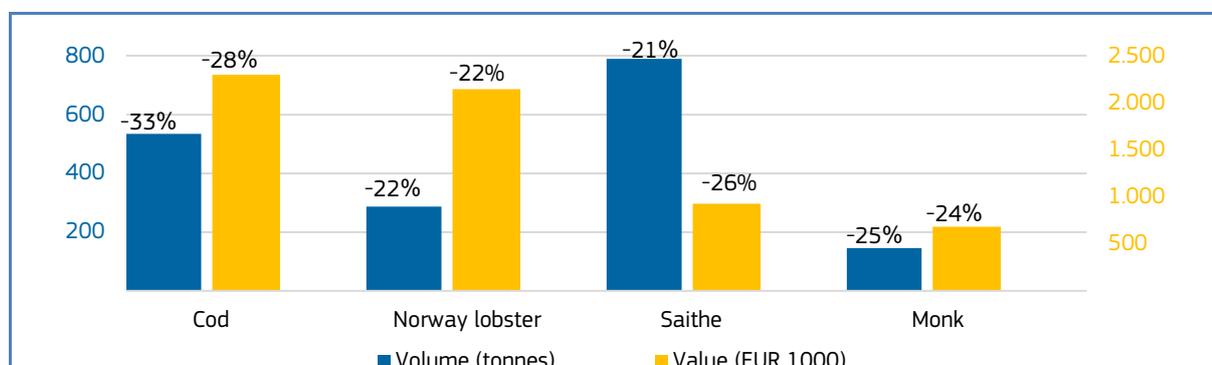


Percentages show change from the previous year.

Table 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK**

 Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
January-July 2020 vs January-July 2019	EUR 124,3 million, -25%	82.808 tonnes, -28%	Norway lobster, cod, saithe, herring, mussel <i>Mytilus</i> spp., clam.
July 2020 vs July 2019	EUR 19,1 million, -11%	10.368 tonnes, -6%	Cod, Norway lobster, saithe, monk, flounder other than European flounder*.

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



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

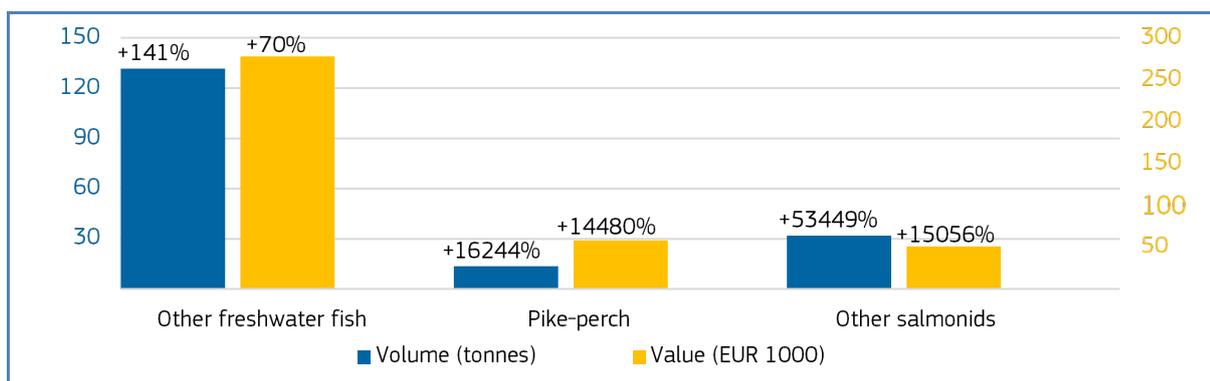
⁴ First sales data updated on 17.09.2020.

⁵ Data on fisheries and aquaculture products harmonised for purpose to allow comparisons along the different supply chain stages in EUMOFA.

Table 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA**

 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
January-July 2020 vs January-July 2019	EUR 8,9 million, +21%	33.950 tonnes, -1%	Value: Pike-perch, smelt, herring. Volume: sprat, herring.
July 2020 vs July 2019	EUR 0,4 million, +129%	217 tonnes, +182%	Other freshwater fish*, pike-perch, other salmonids*, herring.

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

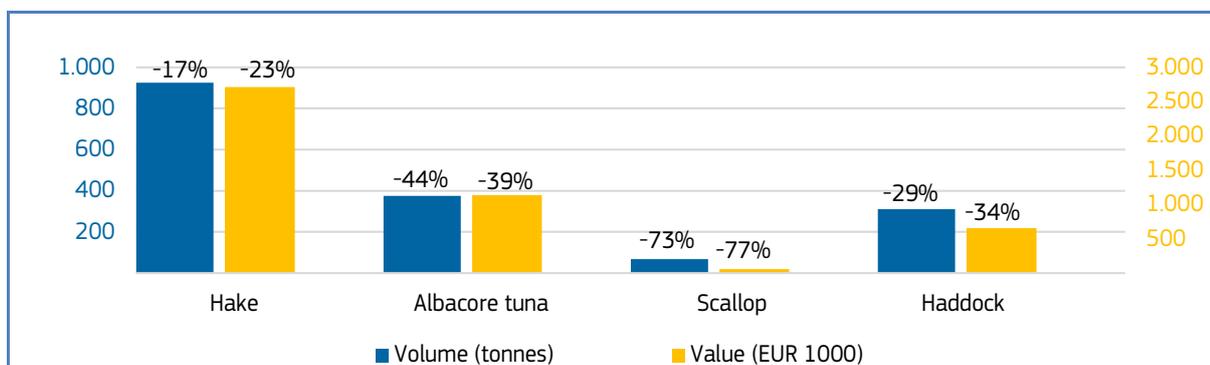


Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

Table 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE**

 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
January-July 2020 vs January-July 2019	EUR 290,8 million, -18%	87.603 tonnes, -16%	Monk, hake, squid, scallop, whiting.	The scallop fishery is closed from May to October; thus, summer production of scallops derives from trawling bycatch. While the decrease in first-sales volume from July 2019 to July 2020 seems sharp (-73%), it only relates to a relatively minor change in absolute terms (from around 251 tonnes to 68 tonnes).
July 2020 vs July 2019	EUR 48,9 million, -5%	14.648 tonnes, -1%	Hake, albacore tuna, scallop, haddock.	

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



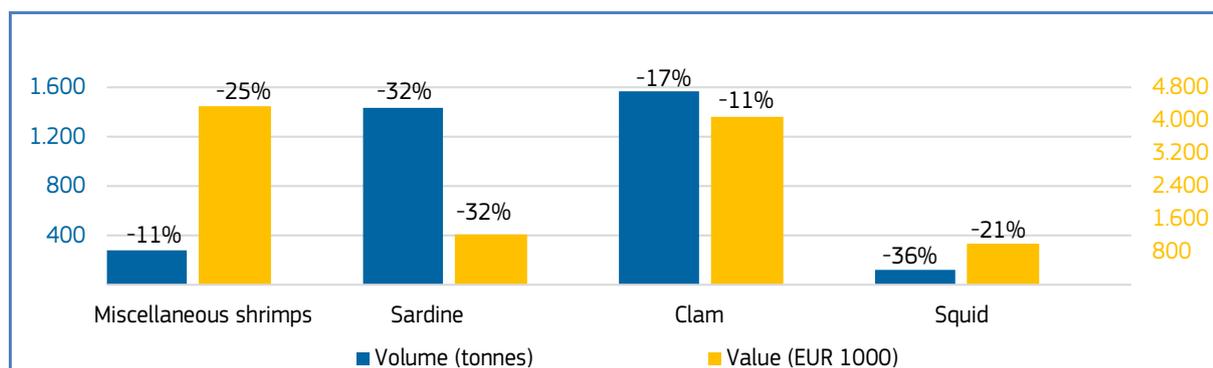
Percentages show change from the previous year.



Table 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY****

 Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
January-July 2020 vs January-July 2019	EUR 182,1 million, -18%	87.603 tonnes, -16%	Miscellaneous shrimps*, anchovy, octopus, sardine, clam.
July 2020 vs July 2019	EUR 37,6 million, -8%	14.648 tonnes, -1%	Miscellaneous shrimps*, sardine, clam, squid.

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, JULY 2020**

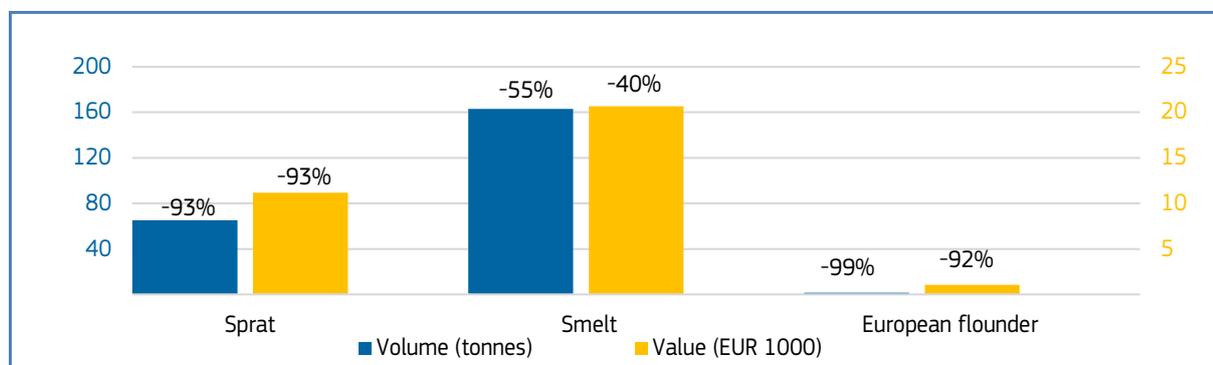


Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>). **Partial data: first-sales data for Italy cover 229 ports (approximately 50% of the total landings in the country).

Table 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA**

 Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
January-July 2020 vs January-July 2019	EUR 4,8 million, -8%	24.035 tonnes, -23%	Sprat, herring, salmon, smelt.	Decreases in sprat and European flounder sales in July 2020 are the result of catch limits applied in 2020 for the cod and sprat stocks in the Baltic Sea ⁶ . As a bycatch species in cod fisheries, catch of European flounder is directly affected by cod catch limits.
July 2020 vs July 2019	EUR 0,2 million, -41%	1.404 tonnes, -45%	Sprat, smelt, European flounder.	

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, JULY 2020**



Percentages show change from the previous year.

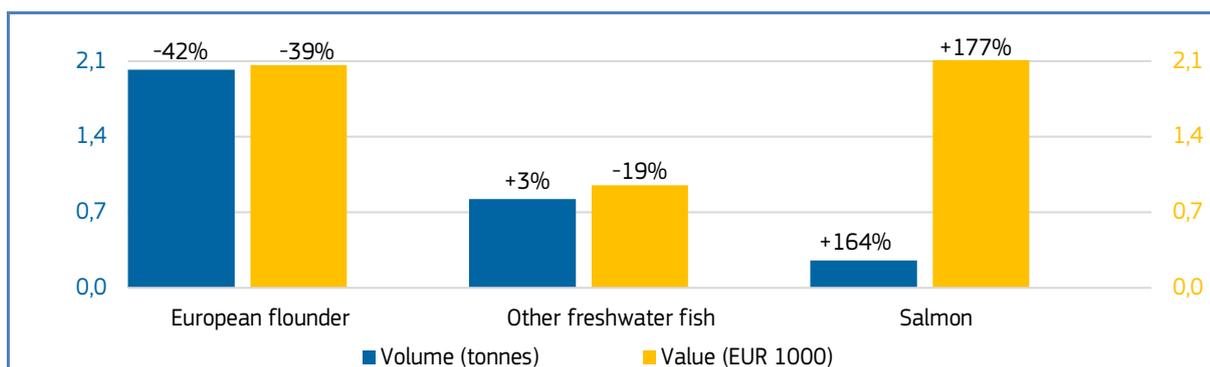
⁶ Council Regulation (EU) 2019/1838 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32016R1139>



Table 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA**

 Lithuania	First-sales value / trend %	First-sales volume / trend %	Main contributing species
January-July 2020 vs January-July 2019	EUR 0,5 million, -8%	1.095 tonnes, +55%	Value: smelt, cod, turbot. Volume: herring, sprat, other marine fish*.
July 2020 vs July 2019	EUR 0,007 million -1%	4 tonnes, -17%	European flounder, turbot, other freshwater fish*.

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, JULY 2020**

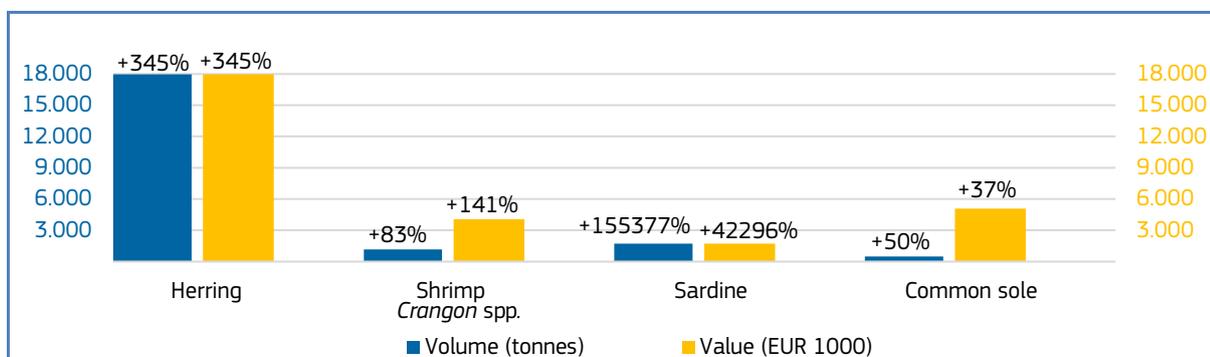


Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

Table 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS**

 The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
January-July 2020 vs January-July 2019	EUR 204,6 million, -2%	141.878 tonnes, +6%	Value: common sole, blue whiting, Atlantic horse mackerel. Volume: herring, mackerel, sardine.	The significant increase in first sales of sardine in July 2020 is the result of the sustainable fisheries partnership agreement between the EU and Morocco, which provides higher fishing opportunities to the Dutch small pelagic fleet. The agreement entered into force on 18th July 2019 and will last until 17th July 2023 ⁷ .
July 2020 vs July 2019	EUR 37,8 million +76%	25.581 tonnes, +106%	Herring, shrimp <i>Crangon</i> spp., sardine, common sole, European plaice.	

Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, JULY 2020**



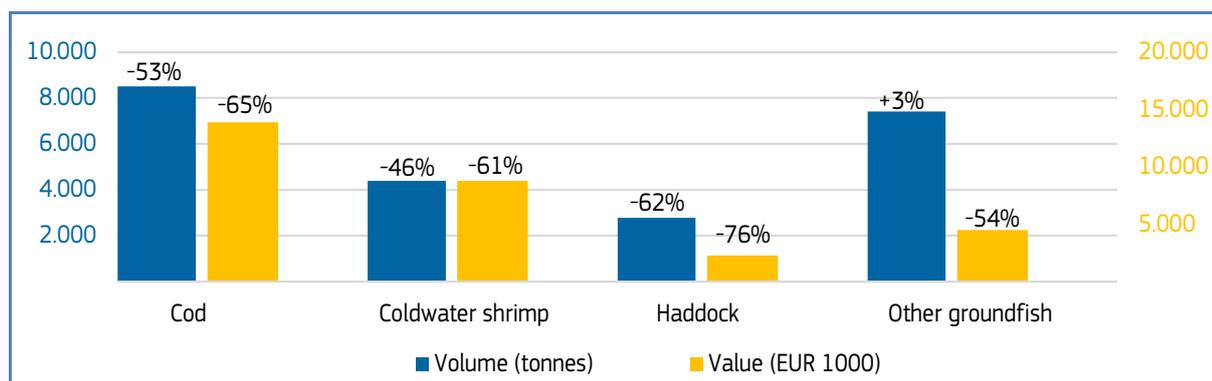
Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

⁷ https://ec.europa.eu/fisheries/cfp/international/agreements/morocco_en

Table 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY**

 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
January-July 2020 vs January-July 2019	EUR 1.272,7 million, -7%	1.705.044 tonnes, +5%	Value: cod, coldwater shrimp, haddock. Volume: other groundfish*, herring, other crustaceans.
July 2020 vs July 2019	EUR 84,4 million -44%	109.493 tonnes, -30%	Cod, coldwater shrimp, haddock, other groundfish*, other crustaceans.

Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, JULY 2020**

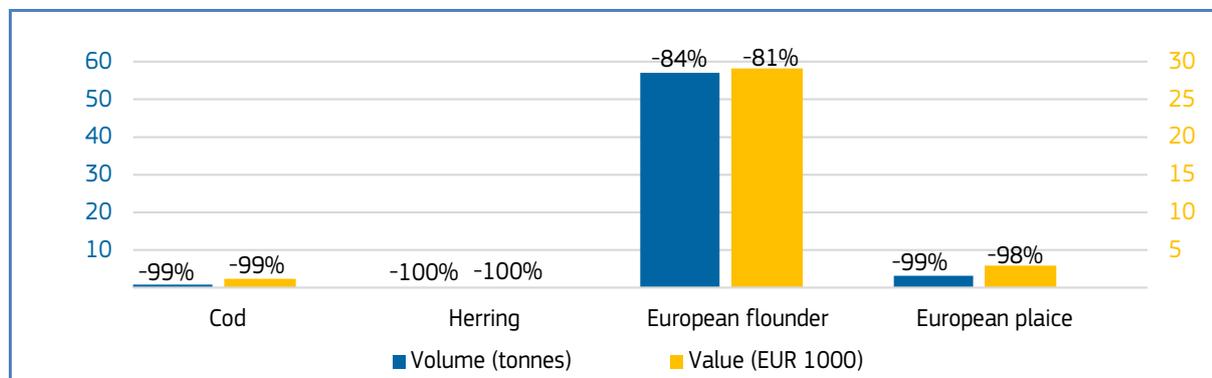


Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

Table 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND**

 Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
January-July 2020 vs January-July 2019	EUR 11,7 million, -39%	50.457 tonnes, -29%	Cod, herring, European flounder, sprat.	Decreases in first sales of the main species are the result of reduced fishing opportunities and the Council Regulation (EU) 2019/1838 ⁸ ban on eastern cod fishing, introduced in 2020.
July 2020 vs July 2019	EUR 0,09 million -90%	70 tonnes, -95%	Cod, herring, European flounder, European plaice.	

Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, JULY 2020**



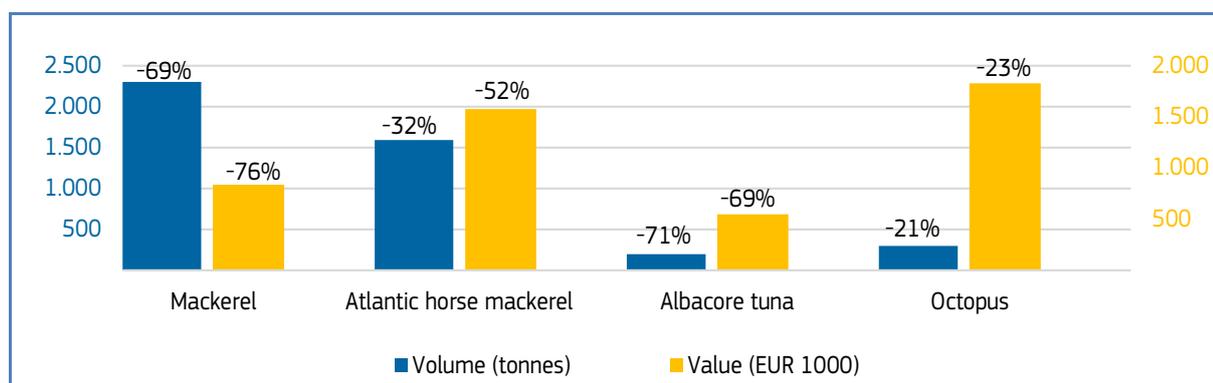
Percentages show change from the previous year.

⁸ Council Regulation (EU) 2019/1838 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R1838&from=EN>

Table 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL**

 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
January-July 2020 vs January-July 2019	EUR 127,5 million, -18%	50.347 tonnes, -22%	Anchovy, octopus, mackerel, Atlantic horse mackerel.	First-sales volume of mackerel in July 2020 was in line with the previous years (2017-2016). Given the “boom and bust” cycles of species abundance, the decrease observed in July 2020 could be considered as regular.
July 2020 vs July 2019	EUR 25,9 million -17%	12.590 tonnes, -27%	Mackerel, Atlantic horse mackerel, albacore tuna, octopus.	

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, JULY 2020**

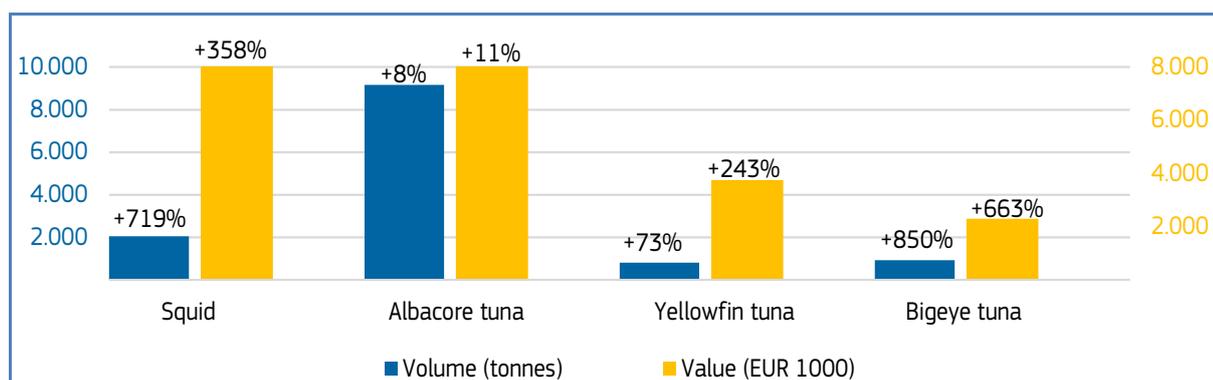


Percentages show change from the previous year.

Table 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN**

 Spain	First-sales value / trend in %	First-sales volume / trend %	Main contributing species	Notes
January-July 2020 vs January-July 2019	EUR 805,4 million, -2%	294.614 tonnes, +2%	Value: hake, octopus, anchovy. Volume: mackerel, squid.	The successful fishing campaign by Spain's high-sea fleet in FAO Major Fishing Area 41 (waters off Argentina and Falkland Islands) in 2020 caused the abrupt increase in first-sales value and volume. Argentinian squid accounted for 63% of the total squid landings (frozen) in Spain in July 2020. First sales of bigeye tuna increased due to the higher fishing opportunities allocated to the artisanal fleet of the Canary Islands.
July 2020 vs July 2019	EUR 155,9 million +7%	52.091 tonnes, +2%	Squid, albacore tuna, yellowfin tuna, bigeye tuna.	

Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, JULY 2020**



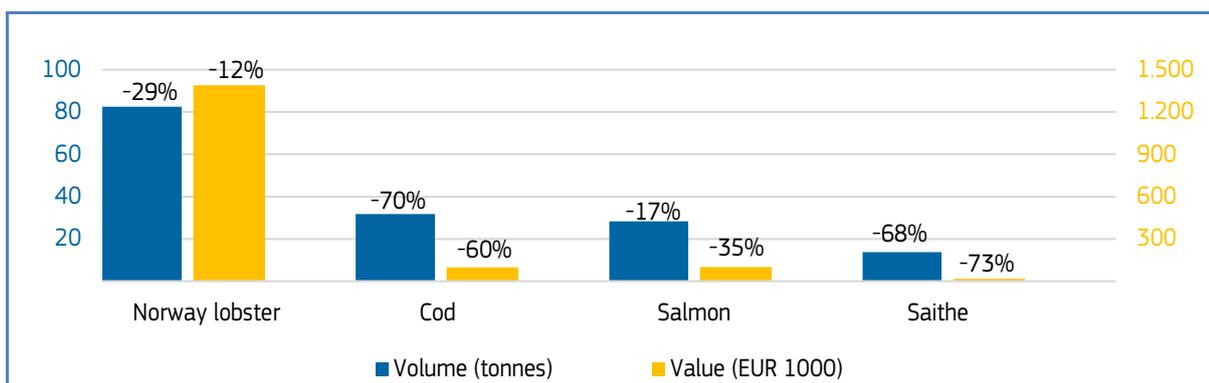
Percentages show change from the previous year.



Table 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN**

 Sweden	First-sales value / trend in %	First-sales volume / trend %	Main contributing species
January-July 2020 vs January-July 2019	EUR 43,3 million, -18%	78.984 tonnes, -35%	Sprat, herring, cod.
July 2020 vs July 2019	EUR 4,2 million -8%	599 tonnes, -33%	Norway lobster, cod, salmon, saithe, sprat.

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, JULY 2020**

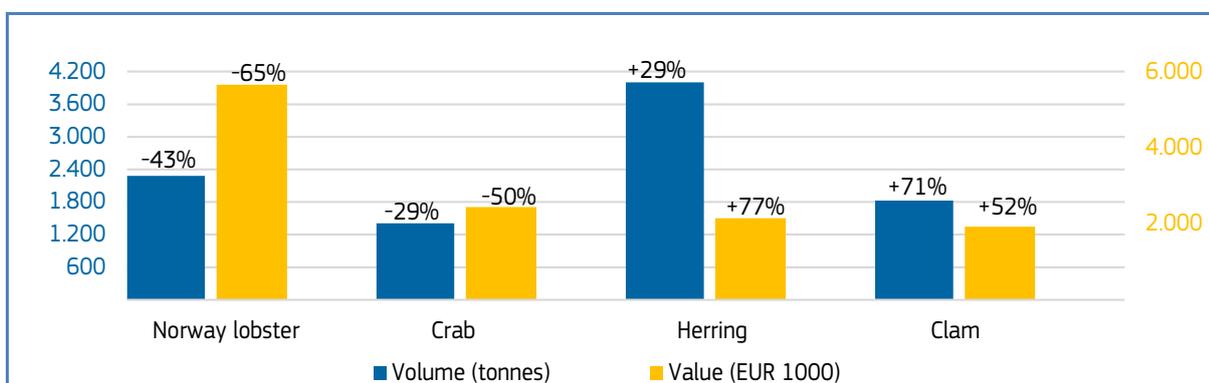


Percentages show change from the previous year.

Table 16. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM**

 the United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
January-July 2020 vs January-July 2019	EUR 255 million, -22%	152.750 tonnes, +3%	Value: Norway lobster, crab, scallop. Volume: mackerel, blue whiting, herring.
July 2020 vs July 2019	EUR 38,4 million -27%	22.233 tonnes, +4%	Value: Norway lobster, crab, lobster <i>Homarus</i> spp. Volume: herring, clam, haddock.

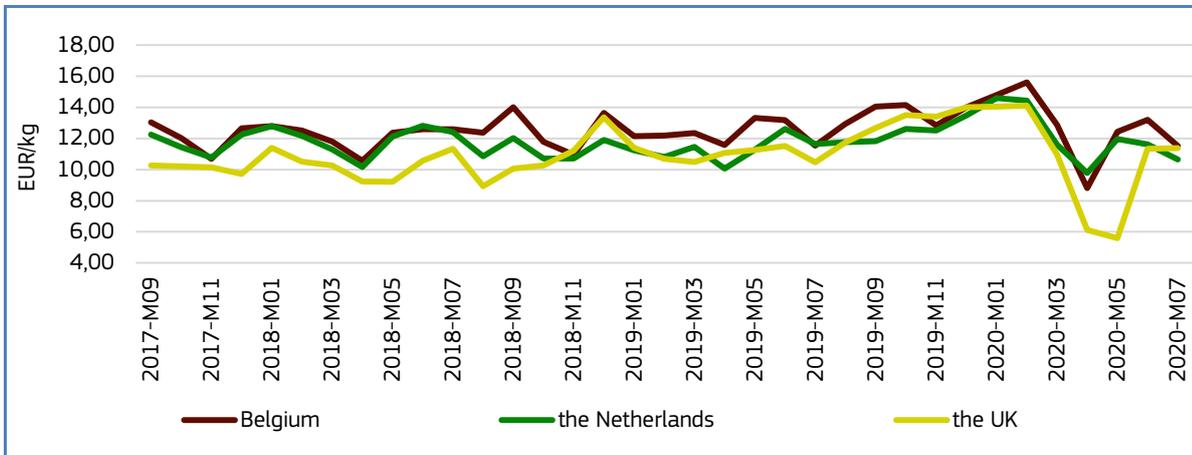
Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, JULY 2020**



Percentages show change from the previous year.

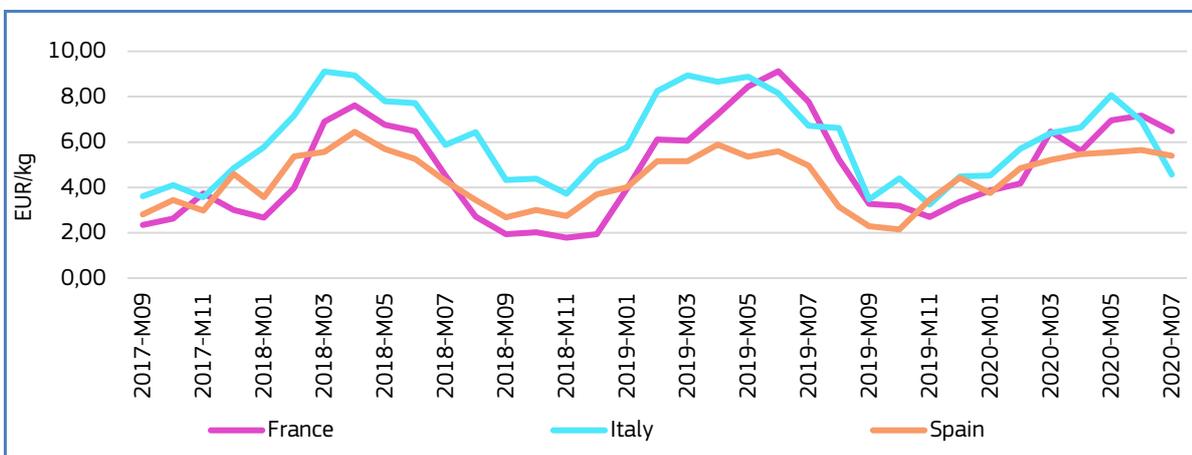
1.4. Comparison of first-sales prices of selected species in selected countries⁹

Figure 15. **FIRST-SALES PRICES OF COMMON SOLE IN BELGIUM, THE NETHERLANDS, AND THE UK**



First sales of **common sole** occur primarily in **the Netherlands**, as well as in **Belgium**, and **the United Kingdom**. The average prices in July 2020 (the most recent available data) came to 11,53 EUR/kg in Belgium (13% down from June 2020, but unchanged from July 2019) and 10,65 EUR/kg in the Netherlands (down by 8% from both the previous month and year). In the UK, the average price was 11,39 EUR/kg (unchanged from June 2020 and 9% up from July 2019). First-sales volume increased in Belgium and the Netherlands (by 8% and 50%, respectively), and decreased by 34% in the UK, relative to the previous year. Common sole fisheries are seasonal, with different peaks for each of the three countries. Over the 36-month period, prices increased in all three markets. During the same period, supply increased in Belgium, and decreased in the Netherlands and the UK.

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

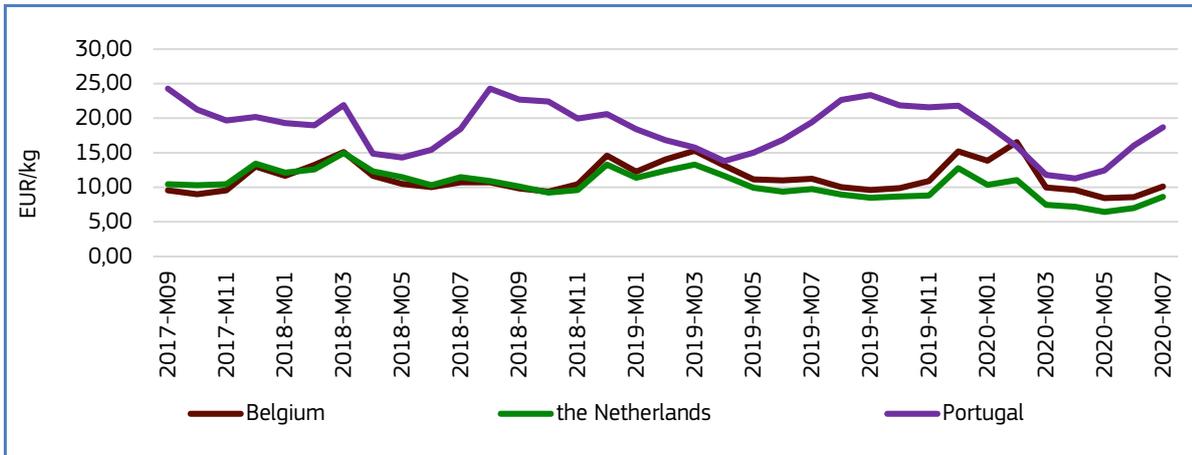


EU first sales of **squillid** occur predominately in **Italy**, as well as in **Spain** and **France**. In July 2020, the average *first-sales prices of squillid were: 6,48 EUR/kg in France (down from June 2020 and July 2019, by 10% and 17%, respectively); 4,57 EUR/kg in Italy (down from both the previous month and year by 34% and 32%, respectively); and 5,39 EUR/kg in Spain (4% lower than June 2020, and up by 9% from July 2019). First-sales volume increased in all countries relative to the previous year: +28% in France, +44% in Italy, and +16% in Spain. Over the past 36 months, squillid prices increased in both France and Spain, and remained stable in Italy. Over the same period, supply increased in Spain, and decreased in France and Italy. First-sales volume is seasonal, with similar peaks (between November and December) for each of the three countries.

⁹ First sales data updated on 21.09.2020.



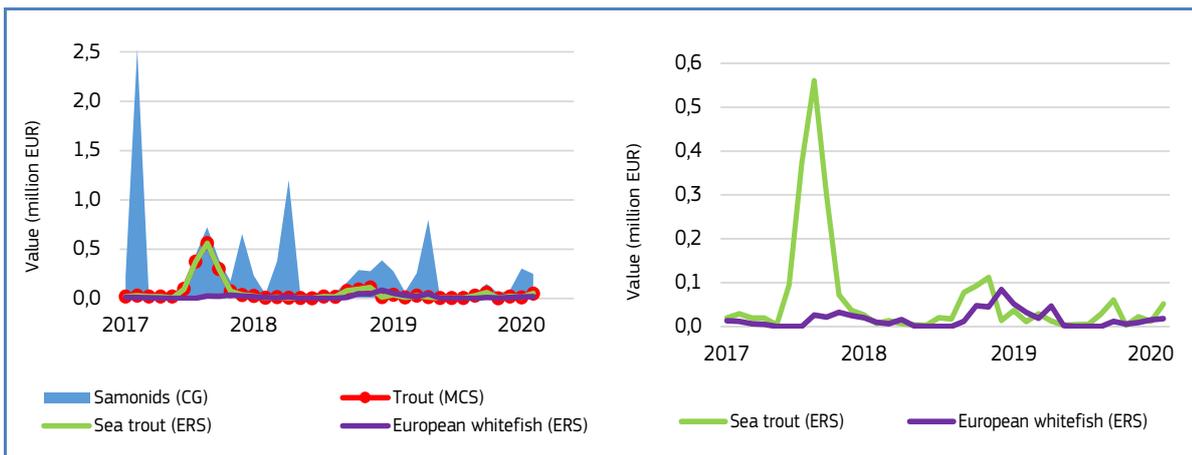
Figure 17. **FIRST-SALES PRICES OF TURBOT IN BELGIUM, THE NETHERLANDS, AND PORTUGAL**



EU first sales of **turbot** occur in many countries, including **Belgium, the Netherlands, and Portugal**. In July 2020, the average first-sales prices of turbot were: 10,13 EUR/kg in Belgium (up by 18% from the previous month, and down by 10% from the previous year); 8,65 EUR/kg in the Netherlands (up by 24% from June 2020 and down by 11% from July 2019); and 18,68 EUR/kg in Portugal (16% higher than the previous month but 4% lower from the previous year). In July 2020 supply decreased in Belgium (-8%) and increased in the Netherlands (+50%), as well as in Portugal (+58%) relative to July 2019. Over the past 36-month period, prices remained relatively stable in Belgium and decreased in the Netherlands and Portugal. Over the past three years, supply decreased in Belgium, and increased in the Netherlands and Portugal, the latter at a faster pace. Supply is seasonal, with peaks between August and October/November in Belgium and the Netherlands, and between April and May in Portugal

1.5. Commodity group of the month: salmonids¹⁰

Figure 18. **FIRST-SALES COMPARISON AT CG LEVEL, MCS LEVEL, AND ERS LEVEL FOR REPORTING COUNTRIES (AUGUST 2017 - JULY 2020)**



The **“salmonids”** commodity group (CG¹¹) ranked 10th in both value and volume for first sales of the 10 CGs in July 2020¹². First sales reached a value of EUR 0,25 million and a volume of 77 tonnes, representing a decrease of 9% (value) and an increase of 49% (volume) relative to July 2019. In the past 36 months, the highest first-sales value of salmonids species was registered at EUR 2,5 million (September 2017).

¹⁰ First sales data updated on 21.09.2020.

¹¹ Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

¹² More data on commodity groups can be found in the Annex.

Salmonids include three main commercial species (MCS): salmon, trout, and other salmonids¹³.

At Electronic Recording and Reporting System (ERS) level, European whitefish (7%) and sea trout (21%) together accounted for 28% of the total reported first-sales value of the salmonids commodity group in July 2020.

1.6. Focus on European whitefish



Source: Scandinavian Fishing Year Book.

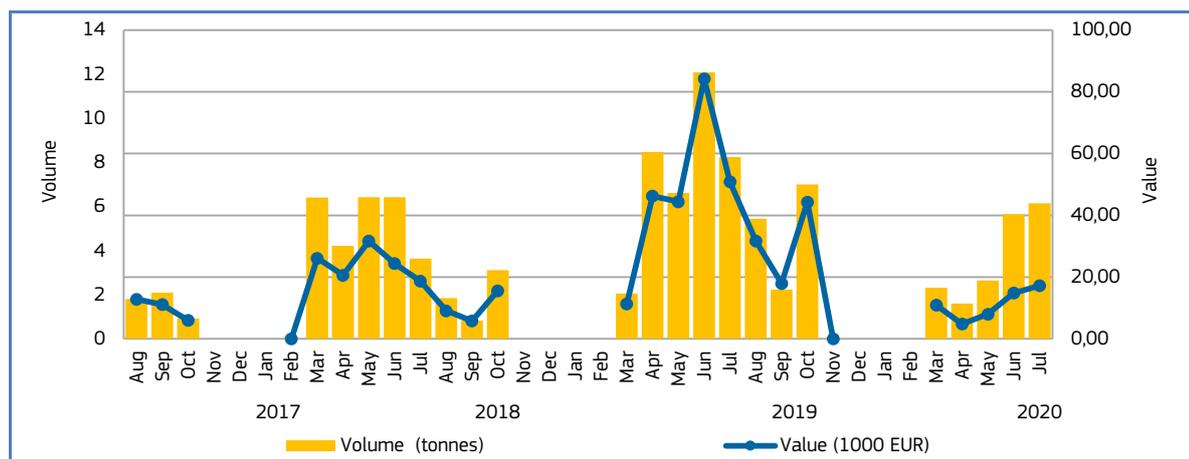
European whitefish (*Coregonus lavaretus*) is a species of freshwater whitefish in the Salmonidae family. It is widespread, ranging from central and northwest Europe to Siberia, and prefers cool, clean, well-oxygenated water. It can grow to more than 55 cm in length and 2 kg in weight, with a lifespan of up to 20 years. Spawning occurs at an age of 4-6 years between the months of September and November, depending on the water temperature. Its main sources of food include bottom-dwelling invertebrates or zooplankton¹⁴. In commercial fisheries, European whitefish is mainly exploited with gillnets¹⁵. Fisheries management measures include minimum reference size and fishery closure areas.

Selected countries

Table 17. COMPARISON OF EUROPEAN WHITEFISH FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF SALMONIDS IN DENMARK AND ESTONIA.

European whitefish		First-sales change of Jan-Jul 2020 (%)		Contribution of European whitefish to total salmonids first sales in July 2020 (%)	Principal places of sale Jan-Jul 2020 in terms of first-sales value
		Compared to Jan-Jul 2019	Compared to Jan-Jul 2018		
Denmark	Value	-76%	-54%	95%	Hvide Sande, Nørre Bork, Ringkøbing.
	Volume	-51%	-32%	98%	
Estonia	Value	+9%	-19%	0,1%	Kassari Sadam, Triigi, Lindi.
	Volume	+48%	+14%	0,3%	

Figure 19. EUROPEAN WHITEFISH: FIRST SALES IN DENMARK (AUGUST 2017-JULY 2020)



In **Denmark**, a large population of European whitefish is present in the lower part of Gudenåen and Randers Fjord. Fishery management measures include a minimum catch size of 36 cm in all areas except Ringkøbing Fjord, where a minimum of 34 cm applies. The fishery season is closed in all places from 1 November to 31 January. Specific management measures apply to Nissum Fjord, where the fishery is closed from 1 October to 31 March, and in Ringkøbing

¹³ EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

¹⁴ <https://www.fishbase.se/summary/Coregonus-lavaretus.html>

¹⁵ https://mare.istc.cnr.it/fisheriesv2/species?sessionId=P8Pu9TYMBLLfGiyZjbs0143lz8ZocVmprPGsINAD_Mbw9zf_8q!566304889?lang=en&sn=13038

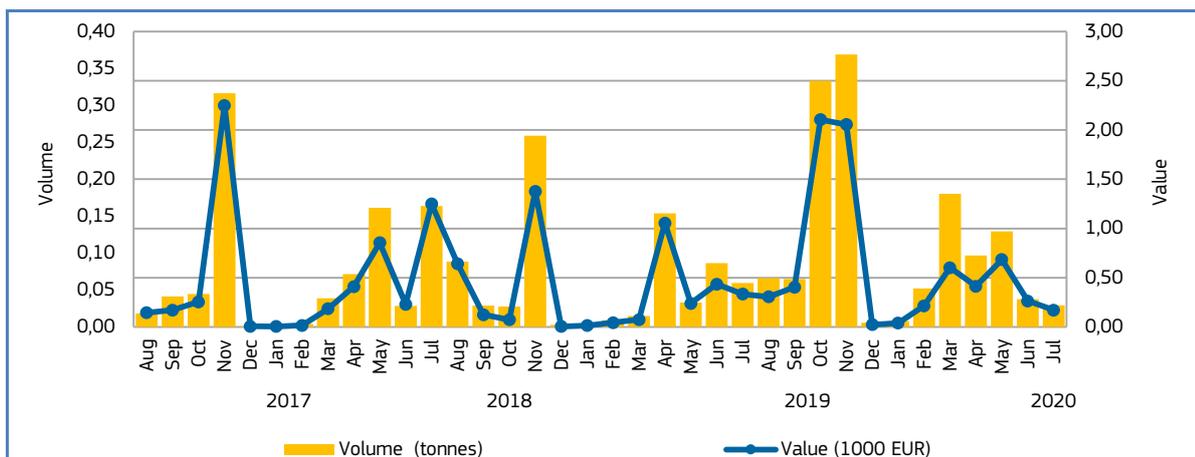


and Stadil Fjords, where the fisheries are closed from 1 November to 28/29 February¹⁶. Peak fishing season for the species occurs during the spring and summer. In the observed period, the highest first-sales volume of 12 tonnes was recorded in June 2019.

Figure 20. **FIRST SALES: COMPOSITION OF SALMONIDS (ERS) IN DENMARK IN VALUE AND VOLUME, JULY 2020**



Figure 21. **EUROPEAN WHITEFISH: FIRST SALES IN ESTONIA (AUGUST 2017-JULY 2020)**



In **Estonia**, in the past 36-months first-sales of European whitefish were low due to limited stock availability. During the observed period first sales fluctuated, with the highest sales in November, and the lowest in December–January.

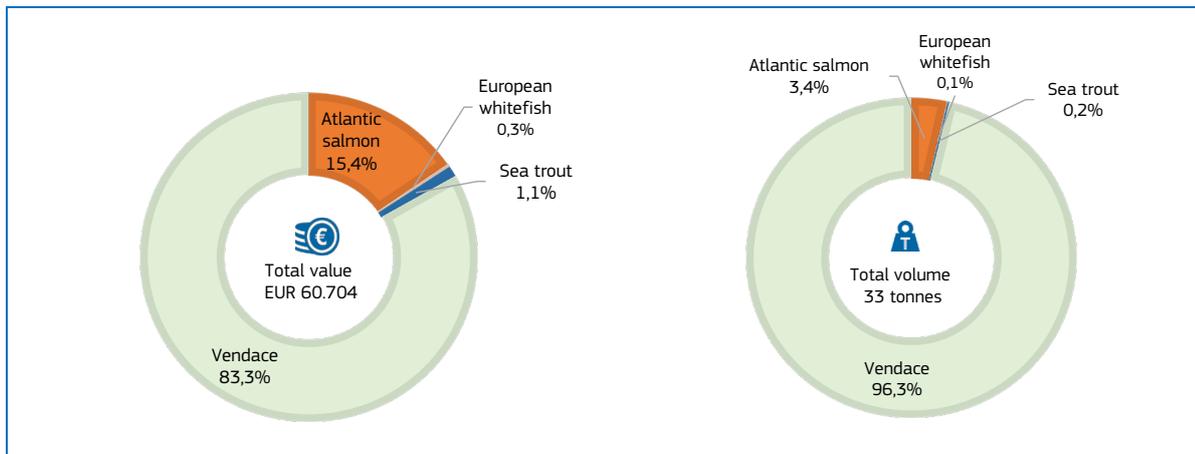


Source: EUROFISH.

¹⁶ <https://fiskeristyrelsen.dk/media/11815/saltvand-web.pdf>

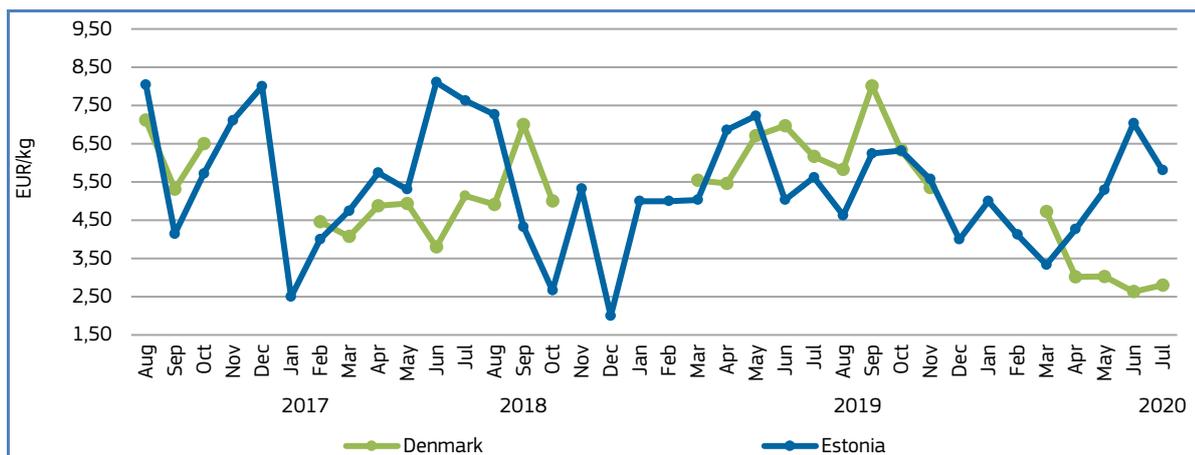


Figure 22. **FIRST SALES: COMPOSITION OF SALMONIDS (ERS) IN ESTONIA IN VALUE AND VOLUME, JULY 2020**



Price trend

Figure 23. **EUROPEAN WHITEFISH: FIRST-SALES PRICES IN SELECTED COUNTRIES (AUGUST 2017–JULY 2020)**



Over the 36-month observation period (August 2017–July 2020), the average first-sales price of European whitefish in **Estonia** was 5,39 EUR/kg, which was 3% higher than in **Denmark** (5,22 EUR/kg).

In **Denmark** in July 2020, the average first-sales price of European whitefish (2,80 EUR/kg) decreased by 55% relative to July 2019, and by 45% relative to July 2018. During the past 36 months, the average price varied from 8,01 EUR/kg for 2,2 tonnes in September 2019, to 2,63 EUR/kg for 5,7 tonnes in June 2020.

In **Estonia** in July 2020, the average first-sales price of European whitefish (5,81 EUR/kg) increased by 3% compared to July 2019 and decreased by 24% relative to July 2018. During the observed period, the highest average price was seen in June 2018 when volume was approximately 30 kg, while the lowest average price was recorded in December 2018 at 2,00 EUR/kg for as little as 3 kg.

1.7. Focus on sea trout



Source: *Scandinavian Fishing Year Book*.

Sea trout¹⁷, an anadromous form of brown trout (*Salmo trutta*), is a migratory species belonging to the Salmonidae family. It is widely distributed in Europe along the Atlantic and Baltic coasts, around the United Kingdom and Iceland, and is also found in the Black and Caspian Seas and as far north as the Barents and Kara Seas in the Arctic Ocean. Sea trout lives in cold rivers and lakes, and spawns in rivers and streams with clean gravel beds. It reaches an average

length of 60 cm but can grow to as long as 130 cm and weigh up to 20 kg under favourable conditions. Sea trout feed mainly on fish and crustaceans. It usually spawns in late autumn (November–December) when it reaches 1–2 years of age¹⁸.

The majority of sea trout products on the EU market come from aquaculture. Wild trout in the EU is mainly targeted by recreational and sport fishers, while commercial fishers primarily catch it as bycatch in the gillnet fishery¹⁹. The main EU fishing nations for sea trout are Denmark, Poland, and France. Sea trout fisheries are regulated through a number of management approaches: fishing season restrictions (closing periods), gear limitations (mesh size), minimum reference size (40 cm), bag-limits (the number of a particular species that an individual fisher can harvest and possess in a given day), and protected areas²⁰.

We have covered **sea trout** in previous *Monthly Highlights*: **First sales**: Denmark, France Poland, the UK (5/2019).

Selected countries

Table 18. **COMPARISON OF SEA TROUT FIRST-SALES PRICES, MAIN PLACES OF SALES, AND CONTRIBUTION TO OVERALL SALES OF SALMONIDS FOR DENMARK, ESTONIA AND POLAND**

Sea trout		First-sales change of Jan-Jul 2020 (%)		Contribution of sea trout to total salmonids first sales in July 2020 (%)	Principal places of sales in Jan-Jul 2020 in terms of first-sales value
		Compared to Jan-Jul 2019	Compared to Jan-Jul 2018		
Denmark	Value	-45%	-39%	5%	Strøby Ladeplads, Sønder Åby, Kerteminde.
	Volume	-49%	-51%	2%	
Estonia	Value	+116%	-1%	1,1%	Tsitre, Purtse, Juminda.
	Volume	+107%	-8%	0,2%	
Poland	Value	-53%	-89%	100%	Chłopy, Hel, Jastarnia.
	Volume	-45%	-87%	100%	

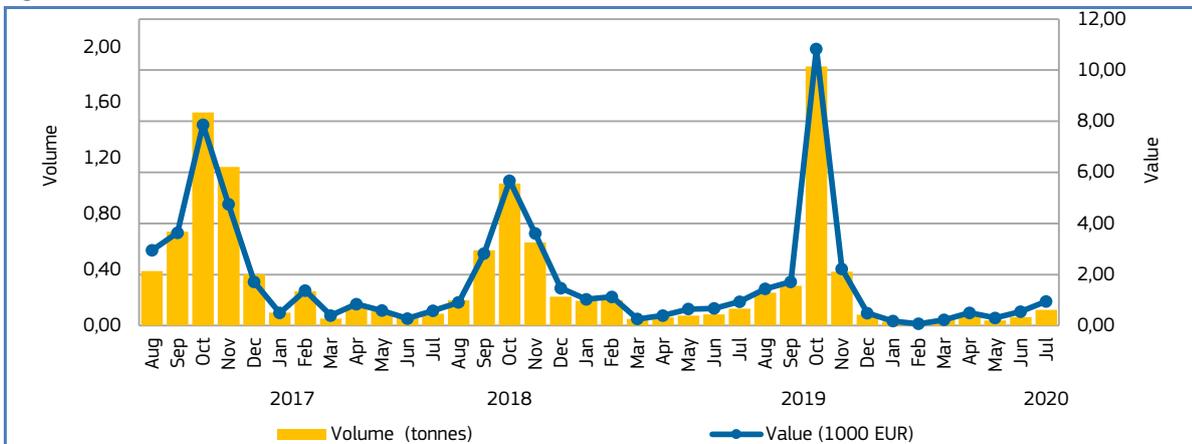
¹⁷ Image source : https://mare.istc.cnr.it/fisheriesv2/species_en?sn=25527

¹⁸ https://ec.europa.eu/fisheries/marine_species/farmed_fish_and_shellfish/trout

¹⁹ <http://ices.dk/sites/pub/Publication%20Reports/Advice/2019/2019/trs.27.22-32.pdf>

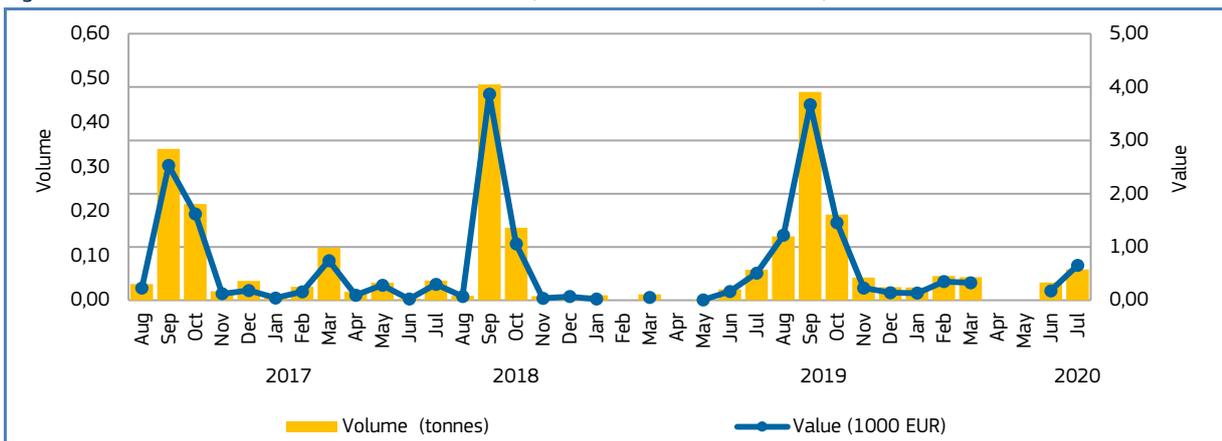
²⁰ https://www.fiskepleje.dk/service/english_version_fiskepleje/seatrout_stocks_denmark

Figure 24. SEA TROUT: FIRST SALES IN DENMARK (AUGUST 2017-JULY 2020)



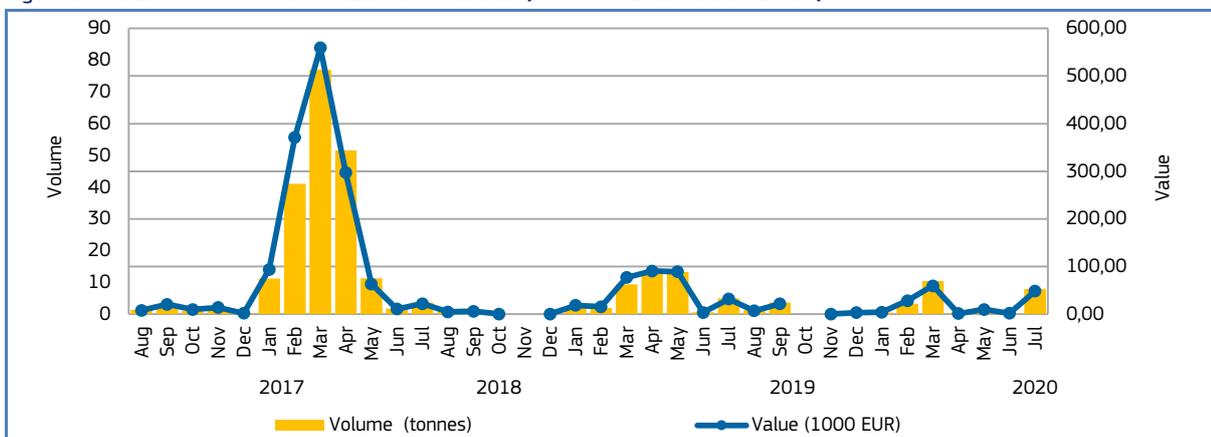
In **Denmark**, sea trout is caught by fyke nets and gillnets. Peak season for sea trout is from September to November, when they migrate to fresh water for autumn spawning. The highest first-sales volume was recorded in October 2019 at 1,9 tonnes.

Figure 25. SEA TROUT: FIRST SALES IN ESTONIA (AUGUST 2017-JULY 2020)



In **Estonia**, commercial fishing of sea trout was the lowest among surveyed countries. In the past 36 months, the peak fishing season occurred in early autumn (peaking in September 2019 with 0,5 tonnes), while the low season was in winter and spring.

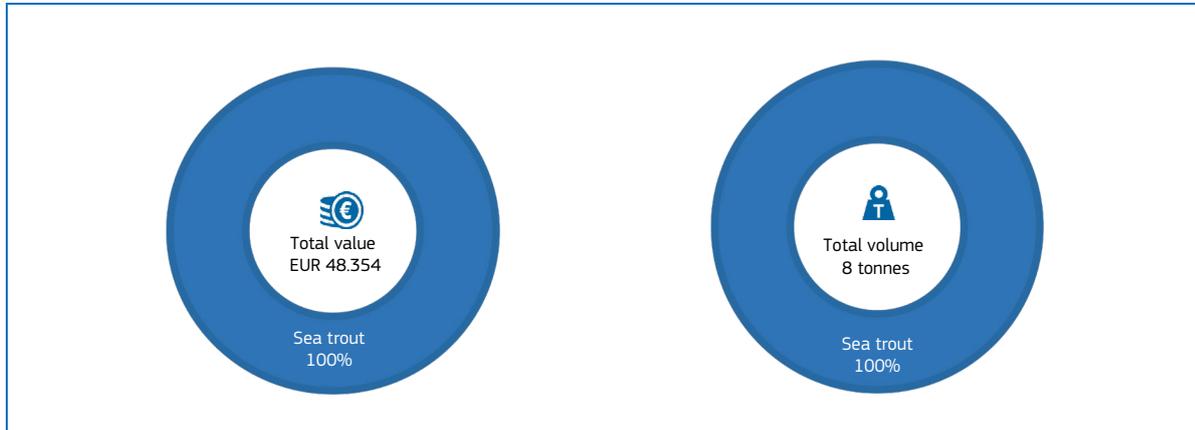
Figure 26. SEA TROUT: FIRST SALES IN POLAND (AUGUST 2017-JULY 2020)





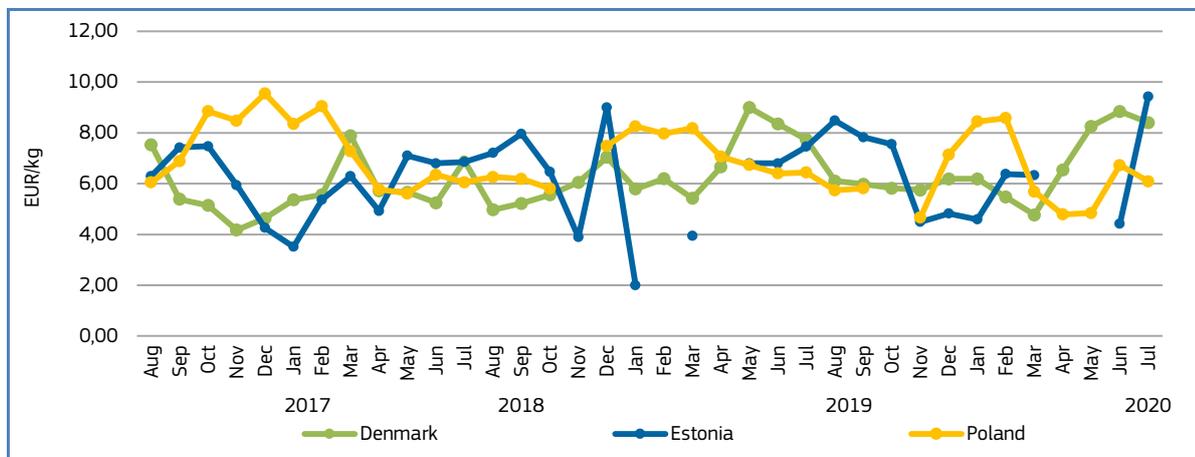
In **Poland**, spring is the period when the highest volume of sea trout is caught. In the analysed period, the highest first-sales volume was recorded in March 2017, when 77 tonnes were sold. Catch is closely linked with that of Atlantic salmon, as both species are landed as bycatch by the same fishing fleet. In September 2018, Poland introduced restrictive measures, as a result of overfishing of the species. This indirectly affected the sea trout fishery, causing a sharp decrease in first sales of sea trout during the high season (March-May 2019 and 2020²¹).

Figure 27. **FIRST SALES: COMPARISON OF SALMONIDS (ERS) IN POLAND IN VALUE AND VOLUME, JULY 2020**



Price trend

Figure 28. **SEA TROUT: FIRST-SALES PRICE IN SELECTED COUNTRIES (AUGUST 2017-JULY 2020)**



Over the 36-month observation period (August 2017–July 2020), the average first-sales price of sea trout in **Poland** was 6,87 EUR/kg, 10% higher than in **Denmark** (6,26 EUR/kg) and 11% more than in **Estonia** (6,19 EUR/kg Estonia recorded the lowest supply of sea trout of all surveyed countries).

In **Denmark** in July 2020, the average first-sales price of sea trout (8,40 EUR/kg) increased by 9% relative to July 2019, and by 22% relative to July 2018. Over the 36-month period, the average price varied from 8,99 EUR/kg for 72 kg in May 2019, to 4,17 EUR/kg for 1,1 tonnes in November 2017. In **Estonia** in July 2020, the average first-sales price of sea trout (9,43 EUR/kg) increased by 26% relative to July 2019, and by 38% relative to July 2018. Over the observed period, the highest average price was recorded in July 2020 at 9,43 EUR/kg for 69 kg. The lowest average price was recorded in January 2019 at 2,00 EUR/kg for 11 kg. In **Poland** in July 2020, the average first-sales price of sea trout was 6,09 EUR/kg, 5% lower than in July 2019, and 1% higher compared to the same month of 2018. The highest price in the past

²¹ Ministry of Marine Economy and Inland Navigation of Poland <https://www.marinepoland.com/offices/ministry-of-maritime-economy-and-inland-navigation.html>



36 months was registered in December 2017 at 9,55 EUR/kg for 197 tonnes. The lowest price (4,67 EUR/kg for 107 kg) was observed in November 2019.

2. Extra-EU imports

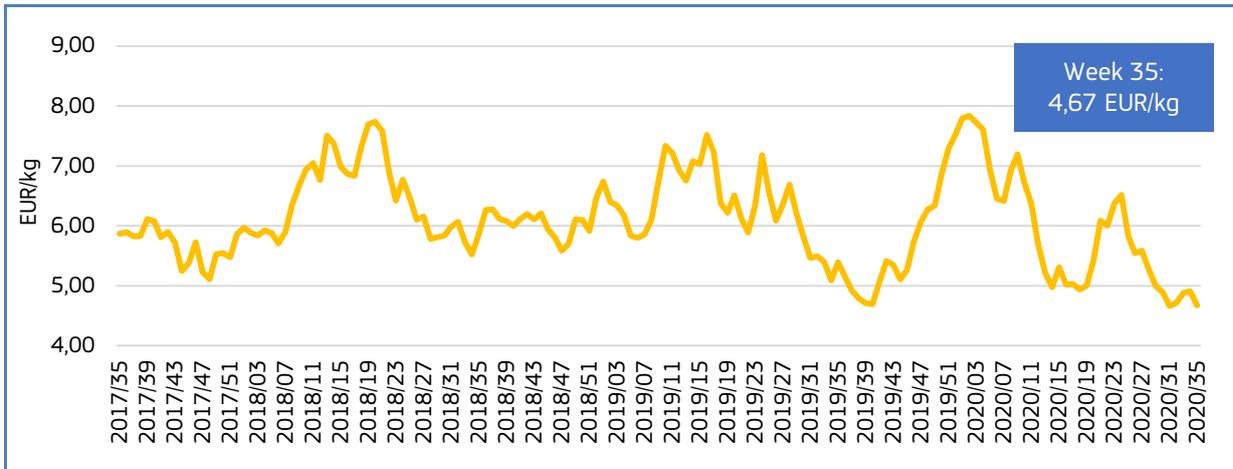
Every month, the weekly extra-EU import prices (average values per week, in EUR per kg) are examined for nine different species. The three most relevant species in terms of value and volume remain consistent, and are examined every month: fresh whole Atlantic salmon from Norway, frozen Alaska pollock fillets from China, and frozen tropical shrimp (*Penaeus*) from Ecuador. The other six species change each month. Three are chosen from the commodity group of the month, which this month is salmonids. The featured commodity species this month are: fresh or chilled Pacific/Atlantic/Danube salmon fillets from Norway, prepared or preserved salmon (whole or in pieces) from the US, and fresh or chilled trout from Norway. The remaining three species examined each month are randomly selected and, this month, include frozen deep-water rose shrimp from Morocco, prepared or preserved octopus from Indonesia, and frozen Coquilles St. Jacques from Canada.

Table 19. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THE THREE MOST RELEVANT FISHERIES AND AQUACULTURE PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 35/2020	Preceding 4-week average	Week 35/2019	Notes
Fresh whole Atlantic salmon imported from Norway (<i>Salmo salar</i> , CN code 03021400)	Price (EUR/kg)	4,67	4,79 (-2%)	5,39 (-13%)	Lower prices in the period August-September due to high harvest season. Downward trend 2017-2020.
	Volume (tonnes)	15.520	14.631 (+6%)	14.538 (+7%)	Higher volumes in the period August-September due to high harvest season. Upward trend 2017-2020.
Frozen Alaska pollock fillets imported from China (<i>Theragra chalcogramma</i> , CN code 03047500)	Price (EUR/kg)	2,69	2,74 (-2%)	2,73 (-1%)	Upward trend week 1 to week 30, 2020, and downward trend in week 31 to 35.
	Volume (tonnes)	1.905	2.259 (-16%)	4.319 (-56%)	Fluctuations in demand; large downward trend.
Frozen tropical shrimp imported from Ecuador (genus <i>Penaeus</i> , CN code 03061792)	Price (EUR/kg)	4,58	4,71 (-3%)	6,13 (-25%)	Downward trend 2017-2020.
	Volume (tonnes)	2.969	3.730 (-20%)	2.672 (+11%)	Fluctuations in demand; upward trend 2017-2020.

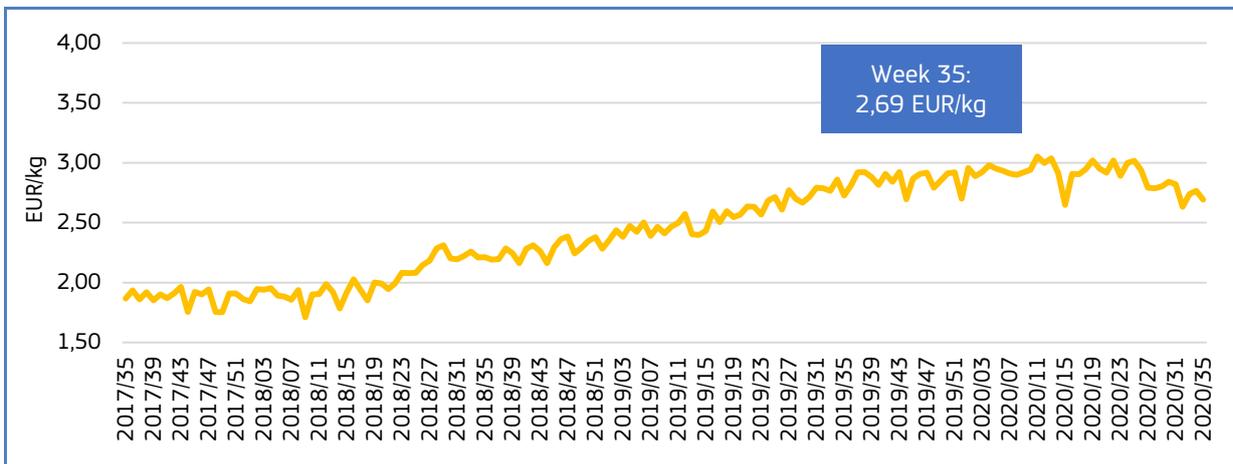
Source: European Commission (updated 21.09.2020).

Figure 29. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY**



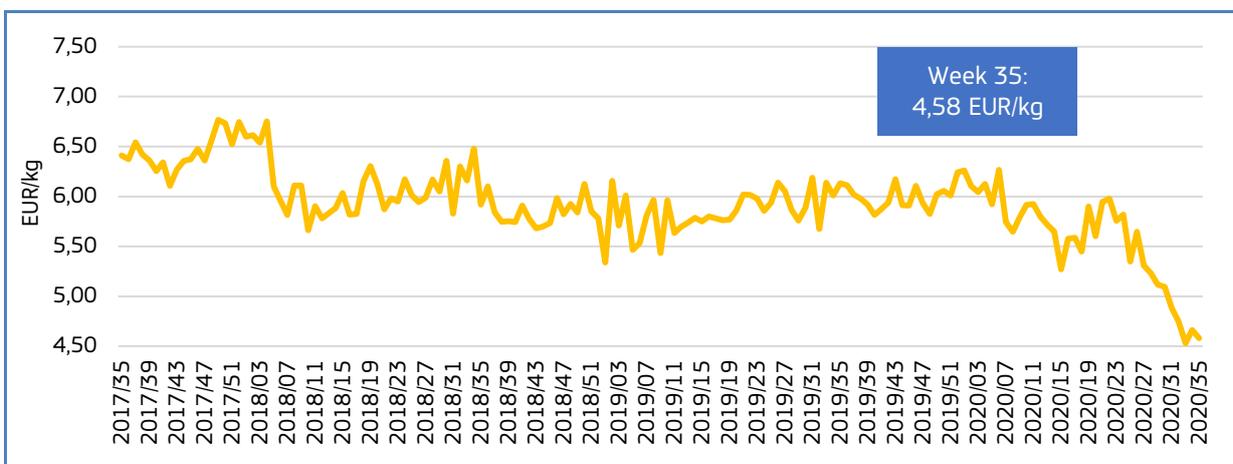
Source: European Commission (updated 21.09.2020).

Figure 30. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA**



Source: European Commission (updated 21.09.2020).

Figure 31. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR**



Source: European Commission (updated 21.09.2020).

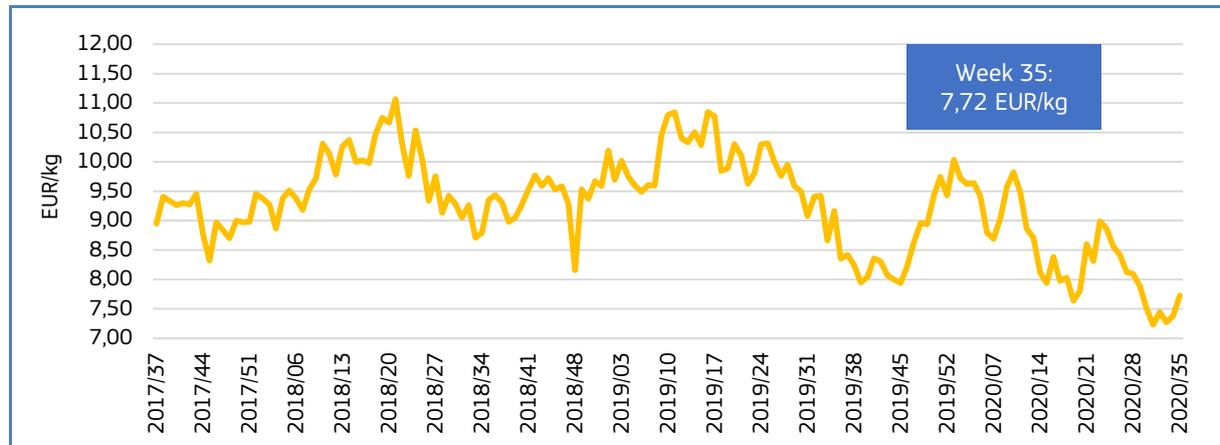
Table 20. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 35/2020	Preceding 4-week average	Week 35/2019	Notes
Fresh or chilled fillets of Pacific/Atlantic/Danube salmon from Norway (CN code 03044100)	Price (EUR/kg)	7,72	7,33 (+5%)	9,17 (-16%)	Price does not correlate with supply and followed a downward trend since week 37/2017
	Volume (tonnes)	840	918 (-9%)	646 (+30%)	Strong upward trend
Prepared or preserved salmon, whole or in pieces from the US (CN code 16041100)	Price (EUR/kg)	*10,85	**6,95 (+56%)	***8,23 (+32%)	Strong upward trend since 2017, continued in 2020.
	Volume (tonnes)	*0,001	**24 (-100%)	***47 (-100%)	High weekly fluctuations
Fresh or chilled trout from Norway (CN code 03021120)	Price (EUR/kg)	3,53	3,75 (-6%)	4,69 (-25%)	Strong downward trend
	Volume (tonnes)	372	382 (-3%)	224 (+66%)	Strong upward trend

Source: European Commission (updated 21.09.2020).

*Data refers to week 32 of 2020 (the most recent available); **week 27 to 30 of 2020; ***week 32 of 2019.

Figure 32. **IMPORT PRICE OF FRESH OR CHILLED PACIFIC / ATLANTIC / DANUBE SALMON FILLETS FROM NORWAY**



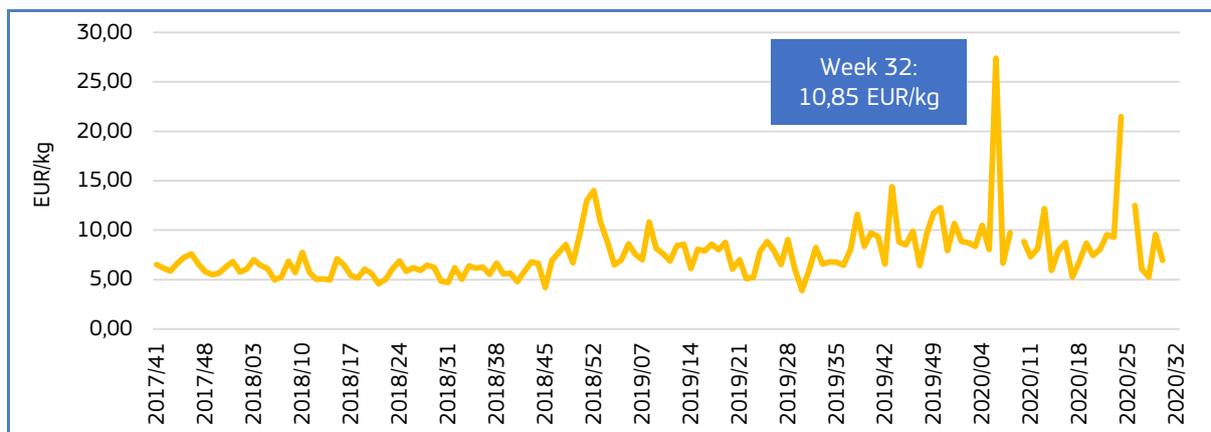
Source: European Commission (updated 21.09.2020).

Since week 1 of 2020, price of fresh or chilled fillets of Pacific / Atlantic / Danube salmon imported from Norway has declined, while volume increased.

Price of prepared or preserved salmon, whole or in pieces from the US exhibited an increasing trend over the past three years, while volume has decreased. The product experienced high fluctuations in supply.

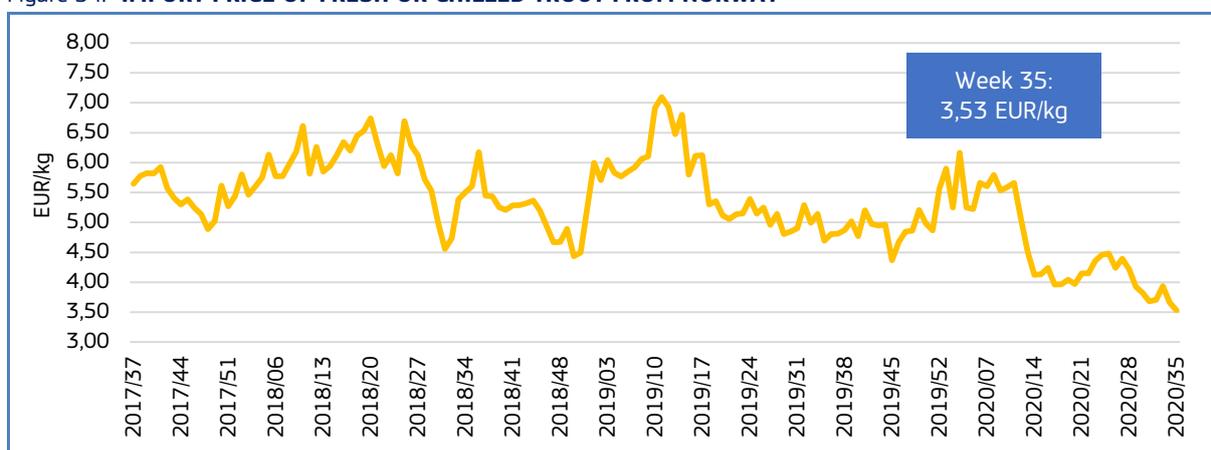
Price of fresh or chilled trout from Norway exhibited a clear downward trend since week 36 of 2017. At the same time, supply decreased.

Figure 33. **IMPORT PRICE OF PREPARED OR PRESERVED SALMON, WHOLE OR IN PIECES, FROM THE US**



Source: European Commission (updated 21.09.2020).

Figure 34. **IMPORT PRICE OF FRESH OR CHILLED TROUT FROM NORWAY**



Source: European Commission (updated 21.09.2020).

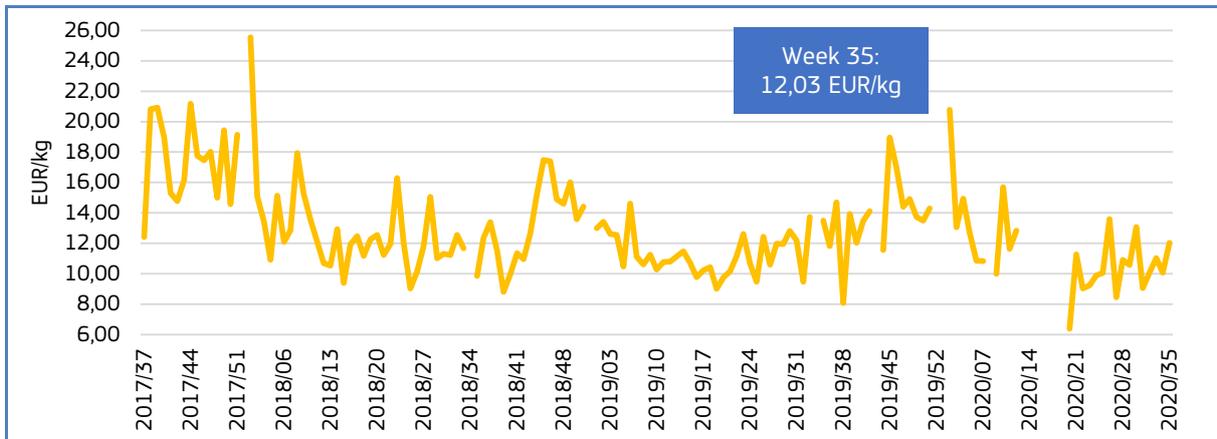
Table 21. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF EU IMPORTS OF OTHER THREE FISHERIES AND AQUACULTURE PRODUCTS RELEVANT TO THE EU MARKET**

Extra-EU Imports		Week 35/2020	Preceding 4-week average	Week 35/2019	Notes
Frozen deep-water rose shrimp from Morocco (<i>Parapenaeus longirostris</i> , CN code 03061791)	Price (EUR/kg)	12,03	10,05 (+20%)	13,50 (-11%)	High weekly fluctuations; overall downward trend
	Volume (tonnes)	30	24 (+29%)	34 (-11%)	High weekly fluctuations; overall downward trend
Prepared or preserved octopus from Indonesia (CN code 16055500)	Price (EUR/kg)	10,20	9,49 (+8%)	7,11 (+43%)	Strong upward trend
	Volume (tonnes)	15	10 (+46%)	0,07 (+21.329%)	Weekly fluctuations; downward trend since week 36/2017 up to week 35/2020
Frozen coquilles St. Jacques from Canada (<i>Pecten maximus</i> , CN code 03072210)	Price (EUR/kg)	*20,57	n/a	n/a	Highly sporadic (data is available for 25 weeks for the past three years); downward trend
	Volume (tonnes)	*0,1	n/a	n/a	Highly sporadic (data is available for 25 weeks for the past three years); limited demand; downward trend

Source: European Commission (updated 21.09.2020).

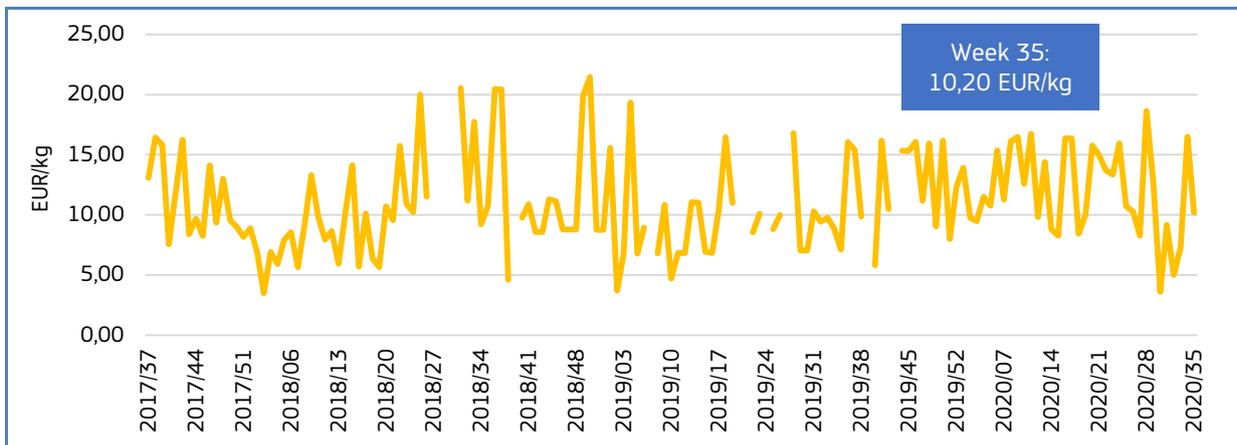
*Data refers to week 10 of 2020 (the most recent available).

Figure 35. **IMPORT PRICE OF FROZEN DEEP-WATER ROSE SHRIMP FROM MOROCCO**



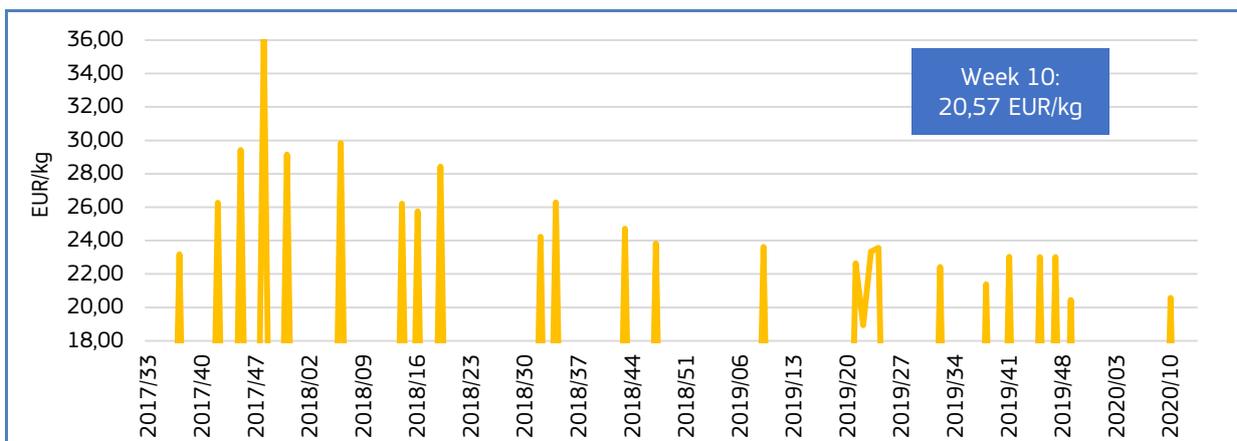
Source: European Commission (updated 21.09.2020).

Figure 36. **IMPORT PRICE OF PREPARED OR PRESERVED OCTOPUS FROM INDONESIA**



Source: European Commission (updated 21.09.2020).

Figure 37. **IMPORT PRICE OF FROZEN COQUILLES ST. JACQUES FROM CANADA**



Source: European Commission (updated 21.09.2020).

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In July 2020, household consumption of fresh fisheries and aquaculture products increased in both volume and value in the majority of EU Member States analysed, relative to July 2019. Only in Italy did consumption decrease in both volume and value, whilst in Hungary, volume decreased but value increased.

The drop seen in Italy was mainly due to reduced consumption of European seabass and octopus (-20% and -19%, respectively).

Germany registered an increase in consumption, due mainly to a rise in consumption of trout and miscellaneous shrimps (+96% and +100%, respectively). Salmon and mussels (*Mytilus spp.*) were the primary drivers of increased consumption in the Netherlands (+23% and +10%, respectively).

Table 22. JULY 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	July 2018		July 2019		June 2020		July 2020		Change from July 2019 to July 2020	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	27,0	890	14,72	1.004	16,81	1.179	20,28	1.102	18,62	10%	11%
France	33,7	14.160	157,81	15.126	169,36	16.571	201,64	16.891	194,22	12%	15%
Germany	13,4	4.008	58,02	3.534	55,78	4.781	76,98	5.303	81,20	50%	46%
Hungary	5,6	204	1,02	367	1,72	285	1,89	302	1,97	18%	15%
Ireland	23,0	1.021	15,20	986	14,90	1.029	15,52	1.022	15,19	4%	2%
Italy	30,9	25.252	253,28	25.529	248,86	29.889	306,70	23.537	242,78	8%	2%
Netherlands	21,1	2.405	36,69	2.816	38,43	3.468	61,71	3.400	48,16	21%	25%
Poland	15,0	2.757	16,68	2.729	18,83	2.869	20,06	3.174	21,82	16%	16%
Portugal	56,8	4.163	25,90	5.827	37,73	7.156	44,66	6.341	40,61	9%	8%
Spain	45,6	49.049	366,03	48.081	368,93	53.093	438,53	51.083	400,13	6%	8%
Sweden	26,6	419	7,14	559	8,34	1.430	15,88	778	10,06	39%	21%

Source: EUMOFA, based on Europanel (updated 17.09.2020).

*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, average household consumption of fresh fisheries and aquaculture products in July has been below the annual average in terms of both volume and value for the majority of the EU Member States analysed. The only exceptions were Denmark, where value was higher than average, and Germany and the Netherlands, where volume was higher than the average. Only in Portugal did volume remain consistent with the annual average.

The most recent weekly consumption data (up to week 40 of 2020) are available on the EUMOFA website and can be accessed [here](#).

3.2. Fresh halibut

Habitat: A flatfish species, inhabiting waters between 200 - 2000 m.

Catch area: Eastern Atlantic, from England to the Norwegian coast, the Faroe Islands, Iceland and Greenland²². It may also be found in the North Sea and the western part of the Baltic Sea²³.

Catching countries in the EU: Denmark, Spain, France, Germany.

Production method: Caught and farmed.

Main consumers in the EU: Denmark, Sweden.

Presentation: Filleted, steak.

Preservation: Fresh, frozen, smoked.

Means of preparation: Grilled, baked.



Source: EUROFISH.

3.2.1. Overview of household consumption in Denmark and Sweden

Denmark and Sweden are among the EU Member States with high per capita apparent consumption²⁴ of fisheries and aquaculture products. In 2017, this amounted to 27,0 kg in Denmark - an increase of 5,9% compared to the previous year. Consumption was 11% above the EU average (24,3 kg), however, it was more than two times lower than in Portugal, the Member State with the highest per capita apparent consumption (56,8 kg).

Swedish apparent consumption was 26,6 kg in 2017, just 1% lower than in Denmark. This was a decrease of 1,8% compared with the previous year, but was still 9% above the EU average. See more on per capita apparent consumption in the EU in Table 22.

Over the past three years, household consumption of fresh halibut in Denmark was 44% higher than that in Sweden. Danish consumers also spent 36% more for a kilogram of fresh halibut (33,81 EUR/kg on average), than Swedish consumers (24,87 EUR/kg on average).

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

First sales: Denmark 6/2020, France 6/2020, Norway 10/2016, 4/2016, November–December 2013, Spain 6/2020.

Extra-EU import: Greenland 2/2020, 3/2018, Norway 4/2019, 1/2019, 3/2018.

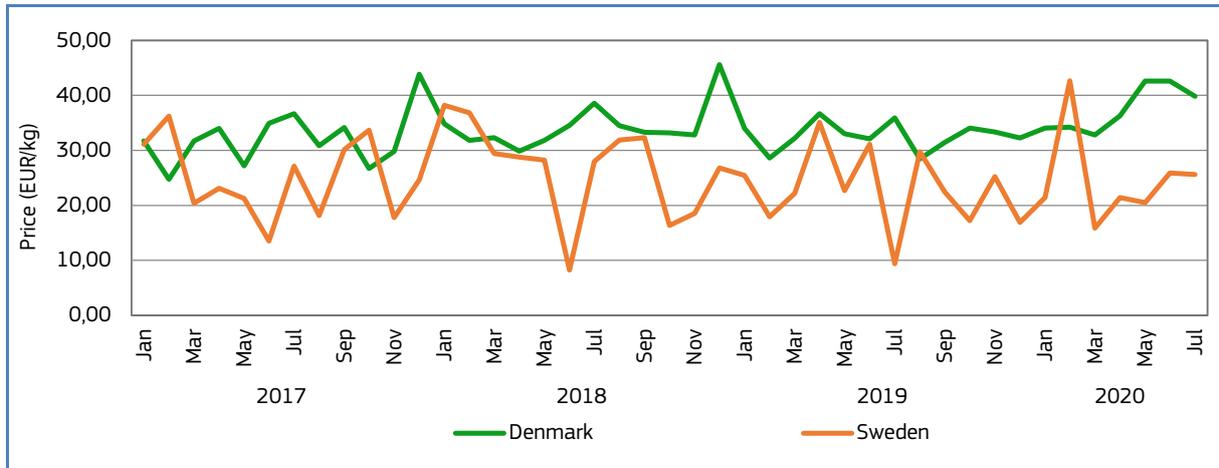
Topic of the month: Trade in the EU 9/2015.

²² <http://www.fao.org/fishery/species/2544/en>

²³ https://www.researchgate.net/publication/242122556_Atlantic_halibut_-_Hippoglossus_hippoglossus

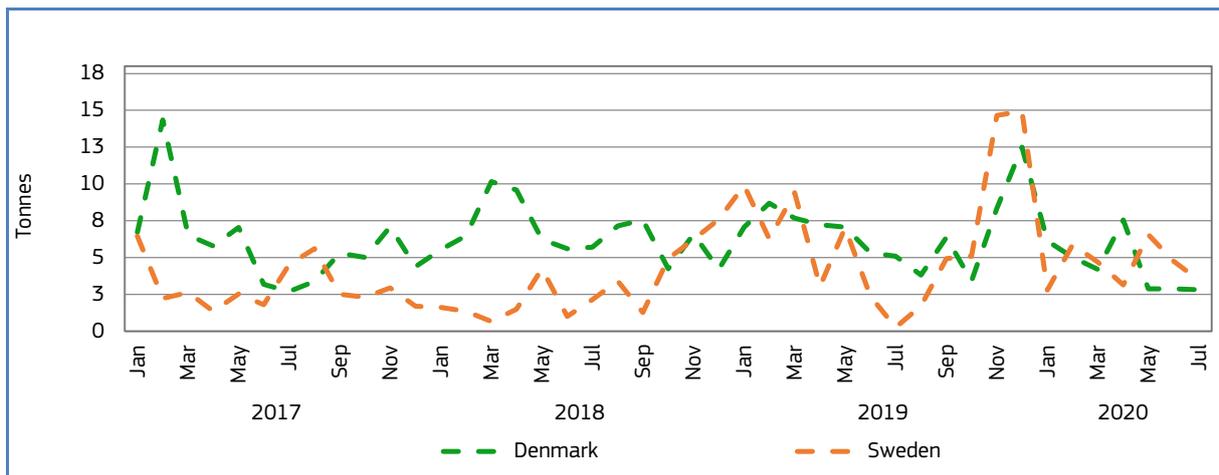
²⁴ "Apparent consumption" is calculated by using the supply balance sheet that provides an estimate of the supply of fisheries and aquaculture products available for human consumption at EU level. The calculation of the supply balance sheet is based on the equation: $Apparent\ consumption = [(total\ catches - industrial\ catches) + aquaculture + imports] - exports$. Catches targeted for fishmeal (industrial catches) are excluded. Non-food use products are also excluded from imports and exports.

Figure 38. PRICES OF FRESH HALIBUT PURCHASED BY DANISH AND SWEDISH HOUSEHOLDS



Source: EUMOFA, based on Europanel (updated 17.09.2020).

Figure 39. HOUSEHOLD PURCHASES OF FRESH HALIBUT IN DENMARK AND SWEDEN



Source: EUMOFA based on Europanel (updated 17.09.2020).

3.2.2. Consumption trends in Denmark

Long-term trend (January 2017 to July 2020): Upward trend in price and downward trend in volume.

Yearly average price: 32,20 EUR/kg (2017), 34,43 EUR/kg (2018), 32,67 EUR/kg (2019).

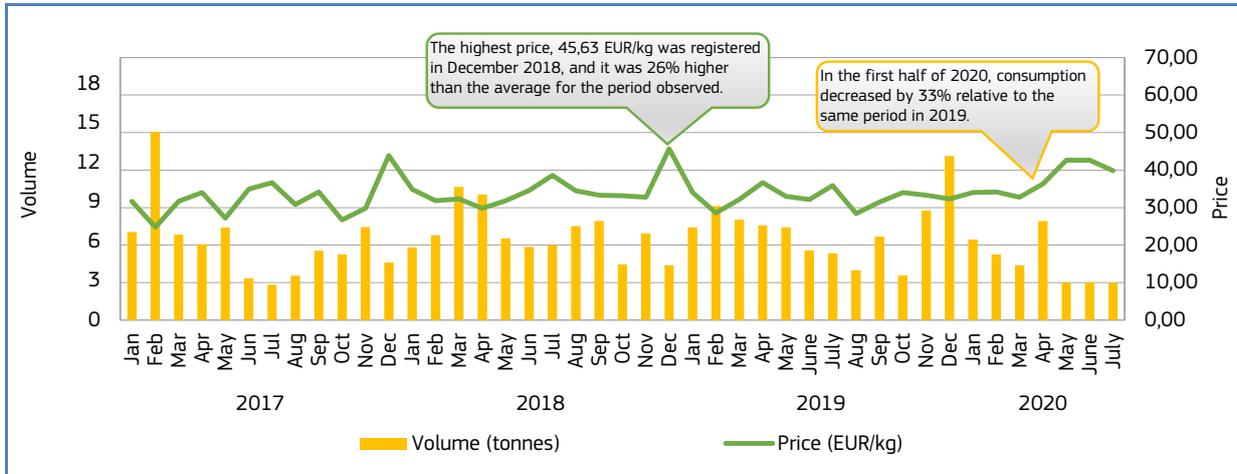
Yearly consumption: 71 tonnes (2017), 79 tonnes (2018), 83 tonnes (2019).

Short-term trend (January 2020 to July 2020): Seasonal decrease in volume and increase in value.

Average price: 37,49 EUR/kg.

Average consumption: 31 tonnes.

Figure 40. RETAIL PRICE AND VOLUME OF FRESH HALIBUT PURCHASED BY HOUSEHOLDS IN DENMARK



Source: EUMOFA, based on Europanel (updated 17.09.2020).

3.2.3. Consumption trends in Sweden

Long-term trend (January 2017 to July 2020): Downward trend in price and upward trend in volume.

Yearly average price: 24,75 EUR/kg (2017), 26,96 EUR/kg (2018), 22,96 EUR/kg (2019).

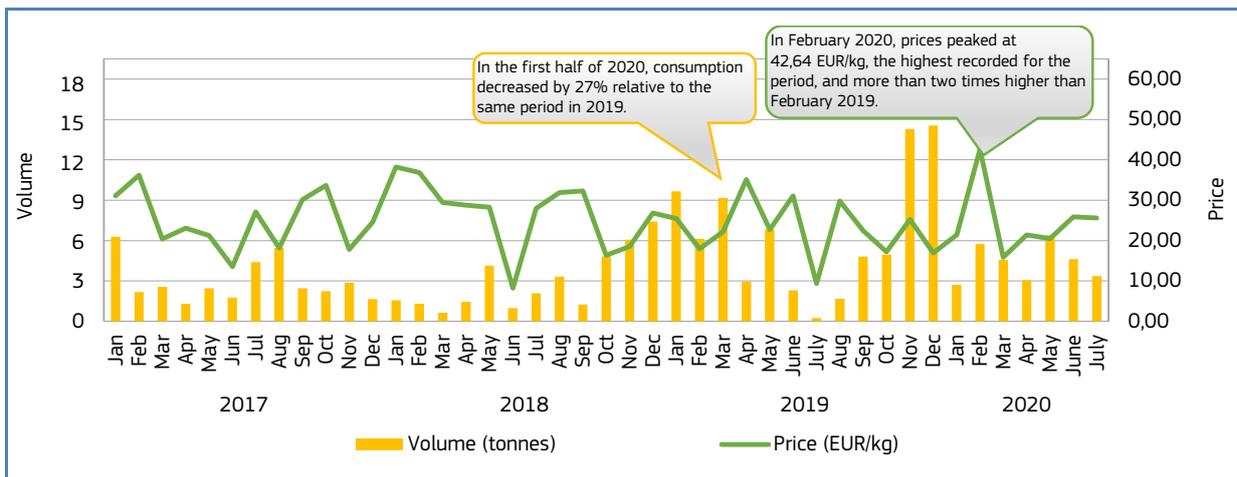
Yearly consumption: 37 tonnes (2017), 36 tonnes (2018), 80 tonnes (2019).

Short-term trend (January 2020 to July 2020): Seasonal increase in volume and decrease in value.

Average price: 24,76 EUR/kg.

Average consumption: 31 tonnes.

Figure 41. RETAIL PRICE AND VOLUME OF FRESH HALIBUT PURCHASED BY HOUSEHOLDS IN SWEDEN



Source: EUMOFA, based on Europanel (updated 17.09.2020).

4. Case study – Fisheries and aquaculture in Peru

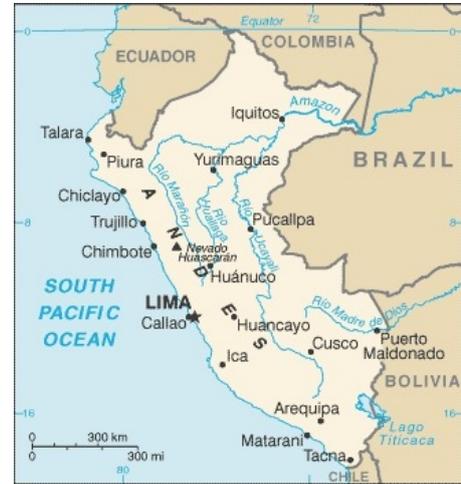
4.1. Introduction

Peru is a republic located in western South America. It shares borders with Ecuador, Colombia, Brazil, Bolivia, and Chile, and its 3.100 km long coastline²⁵ borders the Pacific Ocean.

The population of Peru reached 33 million in 2020²⁶. The Peruvian people consume large amounts of seafood, especially compared to neighbouring countries²⁷. Furthermore, the fisheries sector in Peru is a significant provider of jobs (about 232.000 in 2014). Consequently, the seafood industry is important for the economy of the country, and contributes 1-1,5% of Peru's Gross Domestic Product (GDP)²⁸.

An upwelling system²⁹ off Peru's coast makes the area highly productive in terms of fisheries. The nutrient-rich waters enable Peru to be the third largest fishery nation in the world in terms of volume, mainly due to landings of anchoveta, which make Peru the world's largest provider of fishmeal. Most of Peru's seafood production derives from fisheries, with aquaculture accounting for only about 1,4% of total production volume.

Even though fisheries dominate in terms of volume, the Peruvian aquaculture industry has great potential for growth³⁰. Marine species are the most important for fisheries, whereas freshwater species represent the majority of aquaculture production.



Source: World Factbook

4.2. Fisheries and aquaculture

From a historical point of view, there are large differences between the development of fisheries and aquaculture in Peru. Output from fisheries is highly fluctuating and high-volume, whereas aquaculture is more stable but produces smaller volumes. The fluctuating output of fisheries is due to the effects of El Niño, namely temperature oscillations that greatly affect wild stocks³¹. For instance, the Peruvian anchoveta is sensitive to higher temperatures and stocks can even collapse during El Niño events³².



²⁵ <http://www.fao.org/3/a-i1140e.pdf#page=343>

²⁶ <https://www.worldometers.info/world-population/peru-population/>

²⁷ <https://ourworldindata.org/grapher/fish-and-seafood-consumption-per-capita?country=-BRA>

²⁸ <https://seafood-tip.com/sourcing-intelligence/countries/peru/>

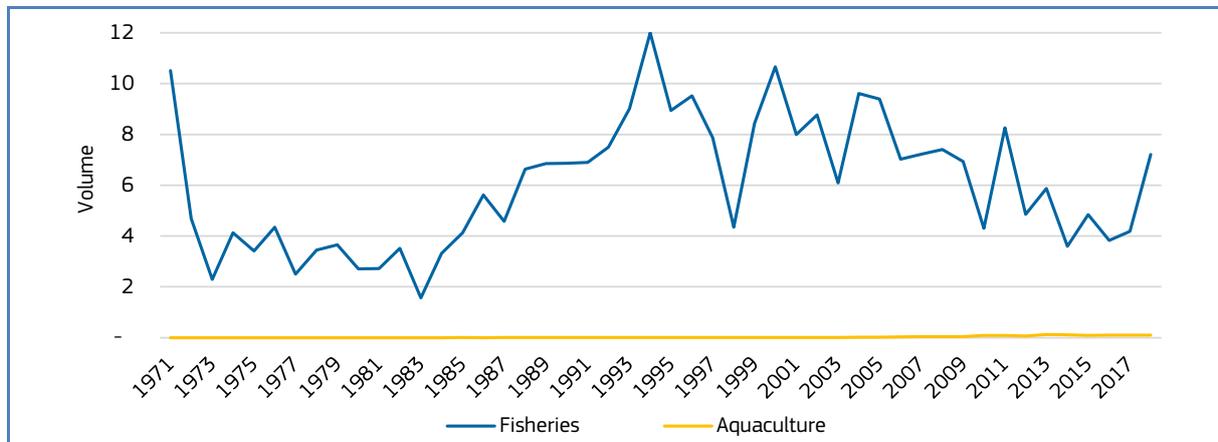
²⁹ More information on upwelling; definition and consequences for fish resources might be useful in footnote, see International Maritime Organization website: <http://www.imo.org/EN/Pages/Default.aspx>

³⁰ http://www.fao.org/fishery/legalframework/nalo_peru/en

³¹ <https://doi.org/10.4060/ca9229en>

³² <http://www.fao.org/3/ca8348en/CA8348EN.pdf>

Source: EUROFISH.
Figure 42. **WILD CATCHES AND AQUACULTURE PRODUCTION (volume in million tonnes)**



Source: FAO.

Fisheries

According to FAO, wild catches in Peru amounted to 7,7 million tonnes in 2018, making Peru the world's third largest fisheries nation. From 2014 to 2018, production was highly fluctuating, mainly due to the vast increase in catches of anchoveta, which accounted for an increased share of total catches (from 65% in 2014 to 86% in 2018).

Table 23. **WILD CATCHES IN PERU, MAIN SPECIES (volume in 1.000 tonnes)**

Species	2014	2015	2016	2017	2018
Anchoveta (Peruvian anchovy)	2.322	3.770	2.855	3.297	6.195
Jumbo flying squid	612	518	323	296	362
Eastern Pacific bonito	41	93	79	101	82
South Pacific hake	64	56	72	80	76
Pacific chub mackerel	74	50	165	113	72
Chilean jack mackerel	82	23	15	10	58
Marine fishes nei	81	21	41	7	52
Common dolphinfish	55	62	40	31	48
Penaeus shrimps nei	29	36	32	21	39
Other species	239	215	206	230	224
Total	3.599	4.844	3.828	4.186	7.208
Change from previous year (%)	-39 %	+35 %	-21 %	+9 %	+72 %

Source: FAO.

The Peruvian fisheries sector may be divided into two sub-sectors: the pelagic large-scale modern fleet and the small-scale artisanal fleet³³. The latter makes up the majority of fishing vessels (90%), accounting for about 18.000 vessels in the Pacific Ocean³⁴.

Overall fisheries production in Peru is highly related to changes in anchoveta catch. The Peruvian anchoveta is a small pelagic fish that takes advantage of the upwelling region of the Pacific Ocean³⁵. Globally, anchoveta is the most important

³³ <http://www.fao.org/3/a-i1140e.pdf#page=343>

³⁴ <https://seafood-tip.com/sourcing-intelligence/countries/peru/>

³⁵ <https://oceana.org/marine-life/ocean-fishes/peruvian-anchoveta>

fisheries species, and Peru contributed 88% of the volume caught in 2018. Despite these large volumes, anchoveta only contributes about 31% of the value and 13% of the employment in the Peruvian seafood sector³⁶.

Peruvian anchoveta fisheries are regulated by the Peruvian government. The Ministry of Production takes action if the stock is dominated by juvenile individuals³⁷ and overfishing is limited by catch quotas³⁸. In 2018, they shared their surveillance information on fishing activity in their waters with the free access platform Global Fishing Watch³⁹. Other sustainability efforts include their aim to make their anchovy fisheries certified⁴⁰.

Peru is also working towards certification for jumbo flying squid fisheries⁴¹, which is the second most productive species in the whole south-east Pacific⁴² and the most important for Peruvian artisanal fishers⁴³.

Aquaculture

According to FAO, the total volume of aquaculture production in Peru amounted to 103.000 tonnes in 2018. Rainbow trout was the primary contributor, followed by whiteleg shrimp and Peruvian calico scallop. Both rainbow trout and whiteleg shrimp farmed production have shown a slight increase since 2014, while farmed production of scallop dropped.

Table 24. **AQUACULTURE PRODUCTION IN PERU, MAIN SPECIES (volume on 1.000 TONNES)**

Species	2014	2015	2016	2017	2018
Rainbow trout	33	41	52	55	55
Whiteleg shrimp	21	22	20	27	30
Peruvian calico scallop	55	23	21	12	12
Nile tilapia	5	3	3	3	3
Other species	1	2	4	3	3
Total	115	91	100	100	103

Source: FAO.

Aquaculture operations can be found throughout Peru, from rearing trout in the mountains and highlands, farming tilapia (as well as other species) in the Amazon, and shrimp and scallop along the coast⁴⁴.

Rainbow trout was the first species introduced in aquaculture in Peru back in 1934⁴⁵. It is currently produced both in intensive ponds (closed systems in rivers) and cages in large lakes⁴⁶, such as Lake Titicaca. Whiteleg shrimp is mainly produced in semi-intensive ponds⁴⁷ along the coast. This shrimp has been vulnerable to white spot syndrome⁴⁸, which led to population decreases in 1999.

³⁶ https://www.lenfestoceano.org/-/media/legacy/lenfest/pdfs/peruvian_anchovies_eng_web.pdf

³⁷ <https://globalfishingwatch.org/news-views/worlds-largest-commercial-fishery-publicly-tracked-on-global-fishing-watch-map/>

³⁸ <https://seafood-tip.com/sourcing-intelligence/countries/peru/>

³⁹ <https://rpp.pe/blog/mongabay/peru-comparte-con-el-mundo-sus-datos-de-vigilancia-pesquera-noticia-1162105>

⁴⁰ <https://www.undercurrentnews.com/2020/06/29/peru-anchovy-fishery-almost-ready-to-start-msc-assessment/>

⁴¹ <https://www.undercurrentnews.com/2017/04/07/peru-to-launch-worlds-largest-giant-squid-certification-project/>

⁴² <https://doi.org/10.4060/ca9229en>

⁴³ <https://fisheryprogress.org/fip-profile/peru-jumbo-flying-squid-jig>

⁴⁴ <https://seafood-tip.com/sourcing-intelligence/countries/peru/>

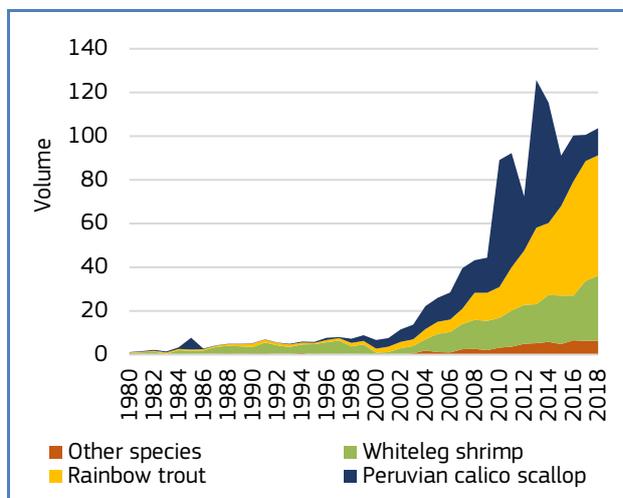
⁴⁵ http://www.fao.org/fishery/countrysector/naso_peru/en

⁴⁶ <https://seafood-tip.com/sourcing-intelligence/countries/peru/trout/>

⁴⁷ <https://seafood-tip.com/sourcing-intelligence/countries/peru/shrimp/>

⁴⁸ White spot syndrome (WSS) is a viral infection of penaeid shrimp. The disease is highly lethal and contagious, killing shrimp quickly. Outbreaks of this disease have wiped out the entire populations of many shrimp farms within a few days, in places throughout the world.

Figure 43. **AQUACULTURE PRODUCTION IN PERU BY MAIN SPECIES (volume 1.000 tonnes)**



Source: FAO.

In 2018, the farmed production of scallop, once the most important aquaculture species in Peru, had decreased by 82% since 2013. In 2013 scallop production peaked, contributing more than half the total volume of aquaculture production in the country. Indeed, total aquaculture production in Peru achieved an all-time high in 2013.

The reasons behind the decline of scallop production could include an unfavourable market (including low purchasing power)⁴⁹ and environmental conditions. El Niño led to temperature changes that negatively affected scallops⁵⁰ in 2016 and 2017⁵¹. However, market conditions seemed to recover, and Peru became the main exporter of wild caught and farmed scallop in the world in 2019⁵².

Peruvian scallops are mainly produced through bottom farming⁵³. The world's first ASC certified scallops were produced in Peru and hit the market in 2015⁵⁴.

4.3. Processing industry

Major quantities of fisheries and aquaculture products in Peru are processed into fishmeal and fish oil. Peru also processes some products imported from other countries. For instance, a lot of the tuna that is imported into Peru is further processed into canned products. The Peruvian tuna canning industry has grown fast over the last few years, rising from processing around 500 tonnes in 2008 to 40.000 tonnes in 2018. In the same period, the tuna canning workforce rose from 500 to 17.500 employees. A contributing factor behind the increase is that foreign vessels fishing tuna in Peruvian waters by law have to land 30% of their catches in Peru. At the end of 2019, the National Superintendence of Customs and Tax Administration (SUNAT) of Peru introduced a 30% duty for tuna landed by foreign vessels in Peru. Within the Peruvian industry there is major concern that this duty may drive vessels away and interrupt the supply of tuna to the canneries⁵⁵.

Fishmeal and fish oil

Fishmeal and fish oil can be made from whole fish, fish trimmings or other by-products from fish⁵⁶, the latter representing a unique possibility for product utilisation, using otherwise unusable resources⁵⁷. Fishmeal is made by drying whereas fish oil is made from pressing, cooking and centrifugation.

Global fishmeal production reached a peak in 1994 and has shown a declining trend ever since⁵⁸. Today, fishmeal is mainly used for aquaculture (carnivorous and omnivorous species), followed by pig feed, poultry feed and other sectors⁵⁹. Hence, the demand for fishmeal is dependent on the needs of these sectors. As the aquaculture sector is trying to rely less on capture fisheries by using feed made from e.g. plants⁶⁰, global fishmeal producers have to be aware of the implications of such trends, as 75% of fishmeal and 70% of fish oil is used in aquaculture production globally⁶¹. Fishmeal and fish oil are

⁴⁹ <https://www.seafoodsource.com/features/where-the-opportunity-lies-for-scallop-producers>

⁵⁰ <https://www.undercurrentnews.com/2018/08/23/peruvian-scallop-output-bullish-but-french-demand-still-sluggish/>

⁵¹ <http://www.fao.org/3/ca7968en/CA7968EN.pdf>

⁵² *Ibidem*.

⁵³ <https://seafood-tip.com/sourcing-intelligence/countries/peru/scallops/>

⁵⁴ <https://www.seafoodsource.com/news/environment-sustainability/first-asc-certified-scallops-to-hit-the-market>

⁵⁵ <https://www.undercurrentnews.com/2020/02/14/peru-scores-own-goal-for-tuna-industry-with-new-tax-on-foreign-landings/>

⁵⁶ <https://www.seafish.org/article/fishmeal-and-fishoil>

⁵⁷ https://www.seafish.org/media/SeafishInsight_FishmealGlobalPicture_201811.pdf

⁵⁸ https://www.seafish.org/media/SeafishInsight_FishmealGlobalPicture_201811.pdf

⁵⁹ <https://effop.org/wp-content/uploads/2019/06/EUMOFA-Monthly-Highlights-April-2019-Fishmeal-and-Fish-Oil.pdf>

⁶⁰ https://www.researchgate.net/publication/233078215_Responsable_Aquaculture_and_Trophic_Level_Implications_to_Global_Fish_Supply

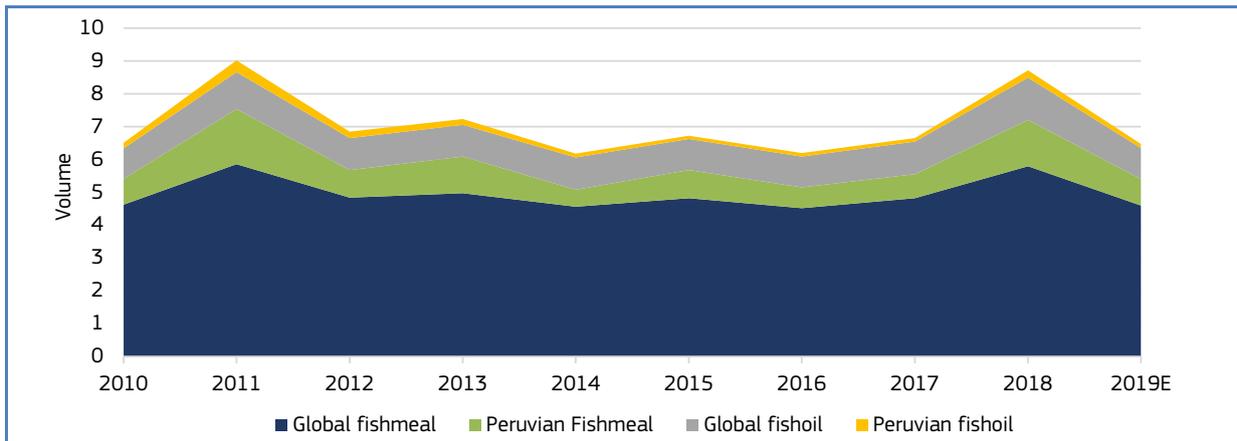
⁶¹ Kontali Monthly Pelagic Report – March 2020.

highly valuable for carnivorous and omnivorous aquatic reared species due to their composition of omega 3 and omega 6 fatty acids⁶².

Several species are used for producing fishmeal and fish oil around the world, including industrial-grade forage fish (sand eel, menhaden, pout), food-grade forage fish (anchovy, sardinella, capelin, blue whiting, sprat) and food-fish (mackerel, pilchard, herring) as the most important⁶³. In contrast, Peru is less diversified and mostly uses anchoveta as the primarily source of fishmeal and fish oil.

Fish oil from Peru is mainly used in salmon and shrimp aquaculture production, whereas fishmeal is used for several species with large amounts used for pig rearing.

Figure 44. **FISHMEAL AND FISH OIL PRODUCTION (volume in million tonnes)**



Source: International Fishmeal and Fish Oil Organisation (IFFO).

4.4. Trade

Peru's economy relies mainly on its natural resources, including fisheries. This is the main reason why Peru has become a member (and associate member) of regional organisations (Andean Community (CAN), the Pacific Alliance, and Mercosur) and entered into many Free Trade Agreements (FTAs) in recent decades. Peru has bilateral FTAs with many of its main trade partners for fisheries and aquaculture products, including Chile (enacted in 2009), the EU (2013), China (2010), Thailand (2011), and South Korea (2011).

Import

In 2019, imports of fisheries and aquaculture products into Peru amounted to 99.000 tonnes worth EUR 239 million. The most imported species were various types of tuna, followed by horse mackerel and other species. Miscellaneous tuna mainly consists of prepared/preserved products from Thailand, frozen horse mackerel from Chile and other marine fish as live/fresh products from Ecuador.

Overall import volume decreased by 17% from 2015 to 2019 whereas value increased by 5%. The fluctuating values during the five-year period analysed could be linked to imports of miscellaneous shrimps (primarily frozen) from Argentina.

⁶² <http://www.fao.org/3/a-y3781e.pdf>

⁶³ <https://www.iffa.net/forage-fish-and-whole-fish>

Table 25. **IMPORTS TO PERU OF MAIN COMMERCIAL SPECIES, RANKED BY VOLUME (volume in 1.000 tonnes, value in million EUR)**

Main commercial species ⁶⁴	2015		2016		2017		2018		2019	
	Volume	Value								
Tuna, miscellaneous	16	60	14	52	16	64	14	52	25	93
Horse mackerel, other	41	49	44	44	45	42	25	24	21	20
Other marine fish	12	19	12	21	13	20	14	13	14	11
Tuna, skipjack	8	7	8	8	1	1	8	11	9	11
Shrimp, miscellaneous	3	23	3	26	8	65	9	64	7	48
Tilapia	2	7	3	9	5	13	5	12	5	13
Mackerel	17	15	10	11	14	13	9	7	4	3
Other species	22	47	25	54	19	43	22	48	15	39
Total	121	227	119	225	121	261	106	231	100	238

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

Chile, Ecuador, and Thailand are the top three countries of origin in terms of import volumes. In terms of value, high-value shrimps have brought Argentina into the top three countries in 2018 and 2019.

Table 26. **IMPORTS TO PERU OF MAIN COMMERCIAL SPECIES, RANKED BY VOLUME (volume in 1.000 tonnes, value in million EUR)**

Countries of origin	2015		2016		2017		2018		2019	
	Volume	Value								
Chile	42	54	47	49	46	49	30	34	27	33
Ecuador	36	63	30	70	37	79	35	55	27	47
Thailand	14	49	10	36	11	44	8	33	15	60
China	3	9	4	12	7	16	5	12	8	23
Argentina	3	14	4	14	9	43	10	56	6	37
Other countries	21	39	23	43	11	31	17	40	17	39
Total	121	227	119	225	121	261	106	231	100	238

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

Even though Peruvian imports of FAP from the EU have shown an increasing trend over the last couple of years, imports are limited. With very few exceptions, imports consist of frozen tuna from the EU tuna fleet and vary with the fishing activity of EU vessels. In 2019, Peruvian imports of FAP from the EU amounted to 3.956 tonnes at a value of EUR 8,1 million. This represents an increase in import value of 5% from 2018. Of the total volume, 3.762 tonnes were frozen tuna (1.873 tonnes of skipjack, 1.005 tonnes of yellowfin tuna and 880 tonnes of bigeye tuna, and 4 tonnes of other tuna species).

Export

In 2019, exports of fisheries and aquaculture products from Peru amounted to 1,8 million tonnes worth EUR 3,2 million, which represents an increase in terms of both volume (46%) and value (47%) since 2015. As mentioned above, Peru is the world's largest provider of fishmeal. It mainly exports fishmeal to China (73% of the total volume in 2019), followed by Japan (7%) and Vietnam (4%). Despite these large volumes exported until 2019, the amount of fishmeal exported to China has recently decreased. As China mainly uses fishmeal to feed pigs and aquatic species⁶⁵, their diminishing demand could

⁶⁴ Peruvian import data is aggregated on main commercial species (MCS) – an aggregation/harmonisation that allow the EUMOFA's end-users to easily select different products or to allow comparison along the different supply chain stages. For information on EUMOFA aggregation from CN-8 to MCS see: <https://www.eumofa.eu/harmonisation>

⁶⁵ <https://www.undercurrentnews.com/2019/12/06/lower-demand-from-china-worries-peruvian-fishmeal-industry-says-new-snp-head/>

partly be explained by the combination of environmental protection and the effects of African Swine Fever (ASF)⁶⁶. Thus, many open aquaculture sites have been closed and the occurrence of pigs in China has been drastically reduced.

Cephalopods, which are the second most exported species from Peru, are also mainly exported to China. Fish oil is the third most exported product, mainly exported to Denmark.

Table 27. **EXPORTS OF MAIN COMMERCIAL SPECIES FROM PERU, RANKED BY VOLUME (volume in 1.000 tonnes, value in million EUR)**

Main commercial species and products	2015		2016		2017		2018		2019	
	Volume	Value								
Fishmeal	714	1.062	644	913	977	1.247	949	1.228	1.063	1.359
Other cephalopods	279	315	168	293	172	347	198	499	352	775
Fish oil	118	267	95	243	165	286	189	305	184	375
Horse mackerel, other	0	0	0	0	0	0	7	5	46	35
Other non-food use	25	19	22	17	28	29	29	25	36	23
Shrimp, miscellaneous	19	131	18	141	26	191	26	171	34	206
Other species	78	356	103	373	130	379	77	355	85	385
Total	1.233	2.150	1.050	1.980	1.498	2.479	1.476	2.588	1.800	3.158

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

China is the dominating market for exports from Peru, accounting for 53% of the volume and 42% of the value of total exports of fisheries and aquaculture products from Peru in 2019. Japan and Spain follow as the second and third largest markets, mainly due to export of fishmeal to Japan and cephalopods to Spain. In value terms, Spain is the 2nd largest market, followed by Japan and South Korea.

Table 28. **EXPORTS FROM PERU BY COUNTRIES OF DESTINATION, RANKED BY VOLUME (1.000 tonnes, million EUR)**

Countries of destination	2015		2016		2017		2018		2019	
	Volume	Value								
China	644	932	512	731	867	1.152	856	1.170	959	1.338
Japan	37	62	39	81	56	99	62	113	110	197
Spain	76	132	62	153	67	160	75	203	90	235
Korea, Republic of	36	71	31	85	33	88	44	137	75	193
Viet Nam	23	33	26	41	54	79	40	67	53	79
Denmark	51	97	21	44	30	39	39	66	46	75
Taiwan	29	48	21	36	31	49	31	52	42	63
Chile	39	68	25	47	44	62	36	47	38	53
Germany	46	62	65	94	20	35	28	44	37	60
Thailand	34	24	15	17	17	21	19	29	34	54
Other countries	218	620	234	653	279	695	245	661	316	809
Total	1.233	2.150	1.050	1.980	1.498	2.479	1.476	2.588	1.800	3.158

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

⁶⁶ <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1199564/>

EU imports from Peru

In 2019, EU imports of fisheries and aquaculture products from Peru amounted to roughly 196.000 tonnes with a value of EUR 531 million. In the last five-year period, EU imports fell by 13% but their value rose by 12%. Most EU imports from Peru consist of cephalopods (largely comprising jumbo flying squid) imported by Spain, followed by fishmeal by Germany and fish oil by Denmark.

Table 29. **EU-28 IMPORTS OF MAIN COMMERCIAL SPECIES FROM PERU, RANKED BY VOLUME (volume in 1.000 tonnes, value in 1.000 EUR)**

Main commercial species and products	2015		2016		2017		2018		2019	
	Volume	Value								
Other cephalopods ⁶⁷	3	5	4	8	62	124	71	189	76	197
Fishmeal	45	60	64	87	19	24	28	35	41	58
Fish oil	58	90	22	48	35	54	62	89	38	66
Tuna, skipjack	4	14	2	6	4	18	6	26	8	34
Shrimp, warmwater	7	42	5	35	7	49	7	43	6	34
Hake	9	17	6	13	7	13	7	12	5	11
Anchovy	6	30	5	26	4	20	5	28	4	27
Other	94	214	68	205	21	93	17	95	18	104
Total	226	472	176	428	159	395	203	517	196	531

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: [DS-016890](#)).

Spain is by far the main target market for Peru's exports to the EU, covering 45% of the volume and 48% of the total value of Peru's exports to EU countries in 2019.

Table 30. **EU-28 IMPORTS FROM PERU BY IMPORTING MEMBER STATE, RANKED BY VOLUME (volume in 1.000 tonnes, value in million EUR)**

Importing Member State	2015		2016		2017		2018		2019	
	Volume	Value								
Spain	79	152	59	153	72	182	79	238	88	254
Denmark	43	84	20	43	25	35	31	50	30	50
Germany	46	72	61	93	19	36	28	47	30	54
Italy	19	49	15	41	14	42	16	54	17	59
France	11	68	9	50	10	49	15	50	11	53
Other	28	48	11	45	20	51	34	78	20	61
Total	226	472	176	428	159	395	203	517	196	531

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: [DS-016890](#)).

As a part of the Andean region, Peru, together with Colombia, entered into a FTA with the EU in 2013⁶⁸. The agreement includes free trade in goods, fish, and marine products⁶⁹ which benefits the seafood sector in Peru. It will also be favourable for EU importers, enabling imports from Peru of both seafood and non-food use products for aquaculture feed (fishmeal, fish oil) free of tariffs⁷⁰.

⁶⁷ The volumes of cephalopod imports appears to have drastically increased from 2016 to 2017. However, this do not reflect the reality as the classification of cephalopods (HS product codes) changed during this time and needs to be taken into consideration when comparing annual volumes.

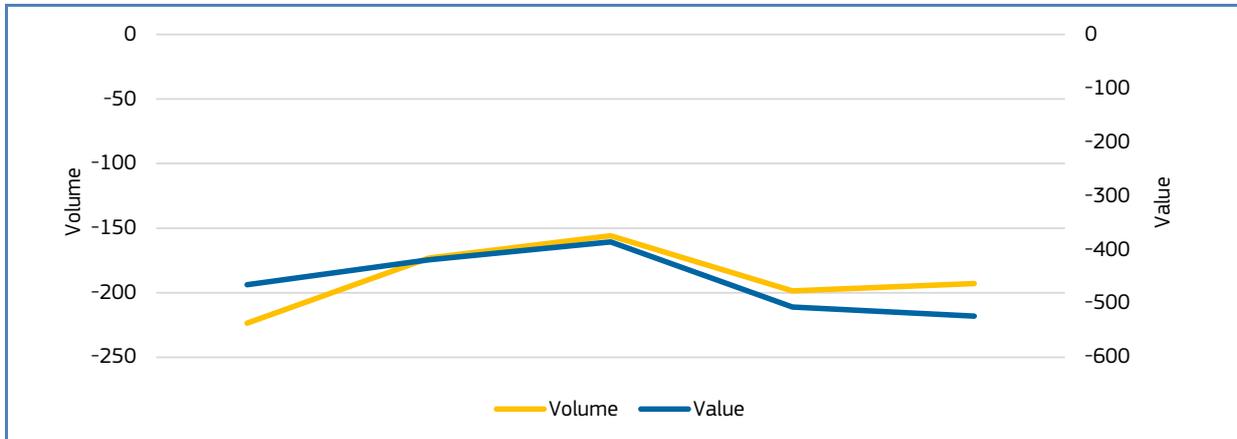
⁶⁸ <https://trade.ec.europa.eu/tradehelp/colombia-ecuador-and-peru>

⁶⁹ <https://www.efta.int/free-trade/free-trade-agreements/peru>

⁷⁰ <https://seafood-tip.com/sourcing-intelligence/countries/peru/>

The figure below shows a significant deficit in EU trade in fisheries and aquaculture products with Peru. In volume, the trade deficit amounted to 193.000 tonnes in 2019 which is 31.000 tonnes less than in 2015, while the trade value deficit amounted to EUR 524 million, which is EUR 59 million higher than in 2015⁷¹.

Figure 45. **EU TRADE BALANCE IN FISHERIES AND AQUACULTURE PRODUCTS WITH PERU (volume in 1.000 tonnes, value in 1.000 EUR)**



Source: EUMOFA elaboration of Eurostat-COMEXT data.

4.5. Consumption

Fish consumption in Peru has historically fluctuated, reaching an all-time low in 1983 (11,01 kg per capita in live weight equivalent) and all-time high in 1989 (27,48 kg per capita in live weight equivalent). Consumption has decreased in recent years, falling to 25,04 kg per capita in 2017. Still, Peru has one of the highest per capita seafood consumption rates in South America⁷². In 2017, the main consumed species in Peru were albacore tuna, jack mackerel, and mackerel⁷³.

Even though most of the Peruvian anchoveta goes to fishmeal, the amounts utilised for human consumption have increased in recent years⁷⁴. As seafood for human consumption provides more revenue and jobs than fish oil and fishmeal⁷⁵, this change is likely to be profitable for Peru.



Source: EUROFISH.

⁷¹ EU trade balance with Peru is calculated as EU exports to Peru minus EU imports from Peru.

⁷² <https://ourworldindata.org/grapher/fish-and-seafood-consumption-per-capita?tab=chart&country=~PER>

⁷³ <https://www.intrafish.com/news/peru-seafood-consumption-increases-year-on-year/2-1-305459>

⁷⁴ <https://www.sciencedirect.com/science/article/pii/S0308597X13002194>

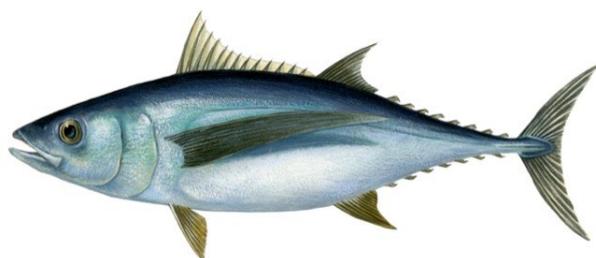
⁷⁵ https://www.lenfestocean.org/-/media/legacy/lenfest/pdfs/peruvian_anchovies_eng_web.pdf

5. Case study – Albacore tuna in the EU

Albacore tuna is a seasonal species caught by the EU fleet (mainly Spanish and French vessels), mostly in the Bay of Biscay. Although it is largely destined for the canning industry, it is also marketed fresh and frozen. In 2018, landings of albacore tuna in the EU reached 25.359 tonnes for a value of EUR 89,4 million, with catches by Spain accounting for more than 60% of the total volume. Whereas EU exports to third countries consist mostly of frozen products, intra-EU trade is dominated by fresh fish⁷⁶.

5.1. Biology resource and exploitation

Biology



Source: Scandinavian Fishing Year Book.

The albacore tuna (*Thunnus alalunga*) is a pelagic and highly migratory species, able to cover very great distances during its life, especially between 2 and 5 years of age. It can reach a maximum age of ten years. Albacore tuna can grow to 30 kg in weight and 1,40 m in length. It reaches sexual maturity at around 4 or 5 years of age, when it reaches a length of about 85 cm and weighs around 15 kg. It is found in the Pacific, Indian and Atlantic Oceans, as well as in the Mediterranean. The Atlantic albacore tuna population consists of two main stocks, one north and one

south of the fifth parallel. There is a separate stock in the Mediterranean. In the Pacific Ocean, two stocks (north and southeast) are present. In addition, there is one single southern stock in the Indian Ocean⁷⁷.

Resource, exploitation, and management in the EU

The main source of albacore tuna in the EU market is that from the northeast Atlantic stock. The fish are caught in the summer as juveniles, when they pass the French and Spanish coasts (Bay of Biscay), as well as in the waters of the Azores. Thus, EU production is extremely seasonal, with most landings recorded between July and October⁷⁸. Historically, albacore was caught with rods using live bait, but this fishery decreased in the late 1980s to be replaced by more productive techniques. Now there are several methods used for harvesting albacore tuna: pelagic trawls, hooks and line, and purse seines. Surface fishing of juveniles and pre-adults is carried out by French and Irish pelagic trawlers, as well as by Spanish liners and pole-and-line vessels. Hooks and line account for 70% of the total catch of albacore in the North Atlantic stock. The adult albacore population, with a more pelagic behaviour, is exploited by Asian longliners off African coasts.

In the EU, albacore tuna stocks are managed through TAC⁷⁹ and quotas set by the ICCAT⁸⁰. In 2020, the EU quota reached 26.869 tonnes for the northern stock and 1.837 tonnes for the southern stock. Of the total EU quota, 60% was held by Spain, 19% by France, 10% each by Portugal and Ireland, and 1% by the UK⁸¹.

5.2. Production

Catches

Global production of albacore tuna amounted to 226.082 tonnes in 2018. The leading producers were Taiwan, Japan and China, which provided respectively 24%, 20% and 17% of the total world production in 2018, followed by the EU-28 (12%). Other major producers were Fiji and the USA (4% each).

⁷⁶ To be noted that when a MS' vessel lands fish in another EU country, this is recorded as "export".

⁷⁷ <http://www.guidedesespeces.org/fr/thon-germon>

⁷⁸ *Ibidem*.

⁷⁹ Total Allowable Catch.

⁸⁰ International Commission for the Conservation of Atlantic Tunas.

⁸¹ https://mare.istc.cnr.it/fisheriesv2/species_en?sn=36007#ecl-accordion-header-conserv-meas

Over the last decade (2009–2018), world catch of albacore tuna has experienced a 3% decrease, mostly attributable to Japanese catches (-30%) and to a lesser extent Fijian and US catches (-23% and -35%, respectively). However, increasing trends have been reported in Taiwan (+39%), China (+90%) and the EU-28 (+54%).

Table 31. **WORLD CATCHES OF ALBACORE TUNA (volume in tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Taiwan	39.280	51.628	47.209	48.754	52.148	41.755	43.256	51.343	54.685	54.436
Japan	63.522	53.965	58.817	69.851	61.740	55.790	54.512	44.781	49.374	44.615
China	20.736	22.618	14.963	32.571	33.134	29.002	26.990	27.971	45.038	39.351
EU-28	18.294	17.981	20.221	25.199	20.162	28.636	24.256	28.366	26.100	28.152
Fiji	12.515	9.252	10.538	10.202	9.561	7.622	7.855	7.905	10.552	9.624
USA	12.678	12.118	11.993	15.040	13.958	12.894	12.428	11.154	7.910	8.245
Indonesia	14.570	13.035	11.474	11.023	6.137	7.658	8.688	7.024	7.024	5.604
Others	50.628	60.255	46.037	45.543	46.539	51.216	54.593	35.317	31.501	36.055
Total	232.223	240.852	221.252	258.183	243.379	234.573	232.578	213.861	232.184	226.082

Source: FAO.

EU catches of albacore tuna amounted to 28.152 tonnes in 2018, providing approximately 12% of the world supply. Spain (60% of EU production) and to a lesser extent France (21%) and Ireland (11%) were the major EU producers. Other important EU producers were Italy (4%) and Greece (2%), both fishing in the Mediterranean, and Portugal (2%).

Over the 2009–2018 period, EU production increased by 54%, although with strong fluctuations due to yearly variations in stock size, resulting in variable TAC and quotas. All major producing countries experienced strong increases in catches over the decade, except for Italy (-62%).

Table 32. **EU CATCHES OF ALBACORE TUNA (volume in tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Spain	11.497	14.127	9.188	14.936	11.390	12.470	14.889	17.532	14.654	16.946
France	1.478	1.438	3.641	3.963	4.884	6.997	3.758	4.468	4.419	5.919
Ireland	1.998	788	3.597	3.575	2.231	2.485	2.390	2.337	2.492	3.102
Italy	2.762	1.109	2.501	1.117	615	1.353	1.638	1.495	1.348	1.044
Greece	116	125	126	126	165	287	541	1.332	608	522
Portugal	365	267	1.089	1.395	688	4.808	953	1.136	2.570	512
Others	78	127	79	87	189	236	87	66	9	107
Total	18.294	17.981	20.221	25.199	20.162	28.636	24.256	28.366	26.100	28.152

Source: FAO.

Landings in the EU

In 2018, landings of albacore tuna in the EU amounted to 25.359 tonnes for a value of EUR 89,4 million (7% greater than in 2017). Spain (64% of the total volume) and France (23%) were the major landing countries for this species. The very low volumes landed in Ireland compared to the volume caught by the Irish fleet is because the Irish fleet has recently changed

its landing strategy and now lands their catches directly in French ports, especially in Douarnenez⁸². Albacore tuna landings in Ireland experienced an 87%-drop over the 2009-2018 period because of this.

Table 33. **LANDINGS OF ALBACORE TUNA IN THE EU (volume in tonnes)** ⁸³

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Spain	10.065	13.436	8.623	9.644	10.927	11.545	14.541	16.875	14.440	16.320
France	914	897	3.900	4.666	5.815	7.151	3.687	4.181	4.016	5.958
Italy	2.834	1.877	2.504	1.154	615	1.353	1.630	1.491	1.364	1.044
Greece	217	231	242	318	359	398	511	573	571	628
Cyprus	-	-	-	-	-	-	520	1.230	639	545
Portugal	107	176	1.016	1.217	565	2.614	917	1.100	2.542	495
Ireland	2.020	830	3.510	3.660	2.231	2.485	2.362	1.779	19	263
Others	19	20	15	19	50	91	48	63	5	105
Totals	16.176	17.467	19.811	20.677	20.562	25.637	24.216	27.291	23.595	25.359

Source: EUROSTAT.

Processing and marketing

Albacore tuna is a highly appreciated seasonal species in the EU and is marketed fresh, smoked, deep frozen or canned. However, since a significant share of catch is attributable to trawlers (and less from pole-and-line and nets), the quality of most fresh landed albacore is not satisfactory for the fresh market. Thus, very often, the mismatch between supply (too many products landed of low quality) and demand leads to a drop in prices at the first-sales stage and the withdrawal of the product from the fresh market. At the same time, the strong demand for quality fresh tuna (all tuna species included) is supplied by imported products. Therefore, much of the albacore tuna landed in the EU is destined for canneries, especially in Spain and to a lesser extent in France⁸⁴. Unfortunately, it is not possible to distinguish albacore tuna in canned tuna statistics. In Spain, albacore tuna is a premium canned product and although it represents less than 4% of the total production of canned seafood in volume, it accounts for more than 8% in value⁸⁵.

Globally, the canned tuna sector is largely export-oriented, so the sustainability guarantees for the consumers may be important, especially when targeting markets in Northern America or Europe. For that reason, many tuna fisheries look to comply with sustainability criteria (stock status and management, bycatch, monitoring, governance, etc.) in order to obtain certifications, most often from private labels. Thus, 15 albacore tuna fisheries are MSC (Marine Stewardship Council) certified. This includes the Spanish fleet operating in the Bay of Biscay⁸⁶ and the French Polynesia albacore and yellowfin longline fishery⁸⁷. Moreover, there are also some Friends of the Sea certified tuna fisheries where EU vessels are involved, namely several French and Spanish vessels operating off Western African coasts and in the Indian Ocean.

5.3. International trade

In trade data, albacore tuna is specifically reported as whole fish, fresh or frozen. Unfortunately, other preservation forms of this species cannot be distinguished, especially canned albacore, which is reported as miscellaneous canned tuna products. In 2019, the EU had a trade deficit for whole albacore tuna amounting to EUR 34 million. Most of this deficit is attributable to imports of frozen whole/gutted albacore tuna from South Africa, China, and the US. Extra-EU imports of

⁸² <https://www.letelegramme.fr/finistere/douarnenez/saison-du-thon-les-irlandais-debarquent-en-force-a-douarnenez-06-07-2020-12578083.php>

⁸³ Totals do not correspond exactly to actual sums because of roundings.

⁸⁴ <http://www.guidedesespeces.org/fr/thon-germon>

⁸⁵ ANFACO 2016.

⁸⁶ <https://www.msc.org/media-centre/press-releases/north-atlantic-albacore-artisanal-fishery-now-msc-certified->

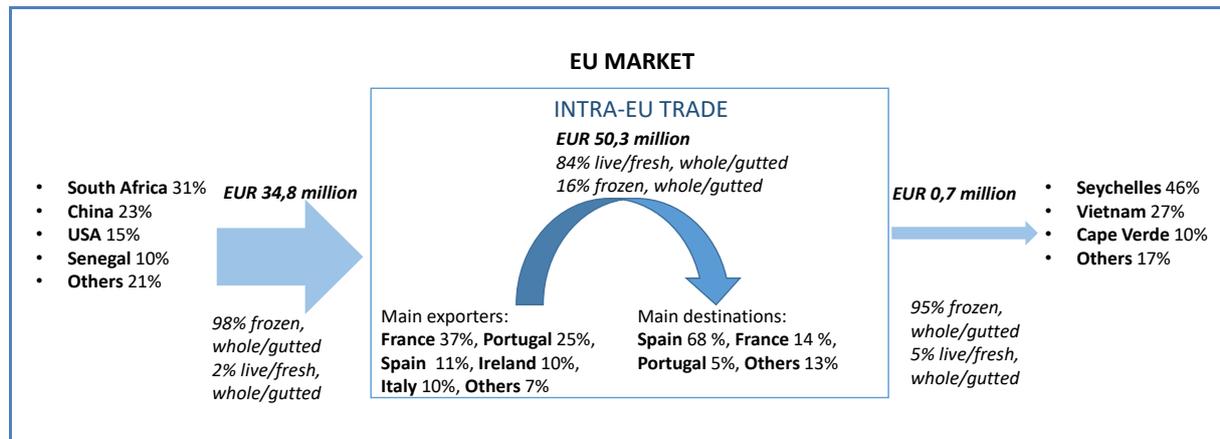
⁸⁷ <https://www.msc.org/media-centre/press-releases/french-polynesia-albacore-and-yellowfin-longline-fishery-achieves-msc-sustainability-certification>

live/fresh albacore tuna products are very limited (EUR 0,8 million for 149 tonnes in 2019), mostly from South Africa and to a lesser extent Australia.

Intra-EU trade is dominated by fresh products. In 2018, intra-EU exports reached EUR 50,3 million for more than 14.000 tonnes, of which 84% were fresh products and 16% were frozen products. Fresh products dominate because most intra-EU trade flows correspond to landings from EU vessels in another EU country (e.g. French fleet landing in Spain or Irish fleet in France). France and Portugal are the main albacore tuna suppliers whereas Spain is by far the main destination of intra-EU exports.

Extra-EU exports are relatively low (EUR 0,7 million for 221 tonnes in 2019) and are dominated by whole/gutted frozen products. Their main destinations are the Seychelles, Vietnam and Cape Verde, likely corresponding with EU distant-water fleet landings in extra-EU countries close to fishing areas and processing facilities (e.g. canneries).

Figure 46. **THE EU ALBACORE TUNA TRADE MARKET IN 2019**⁸⁸



Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

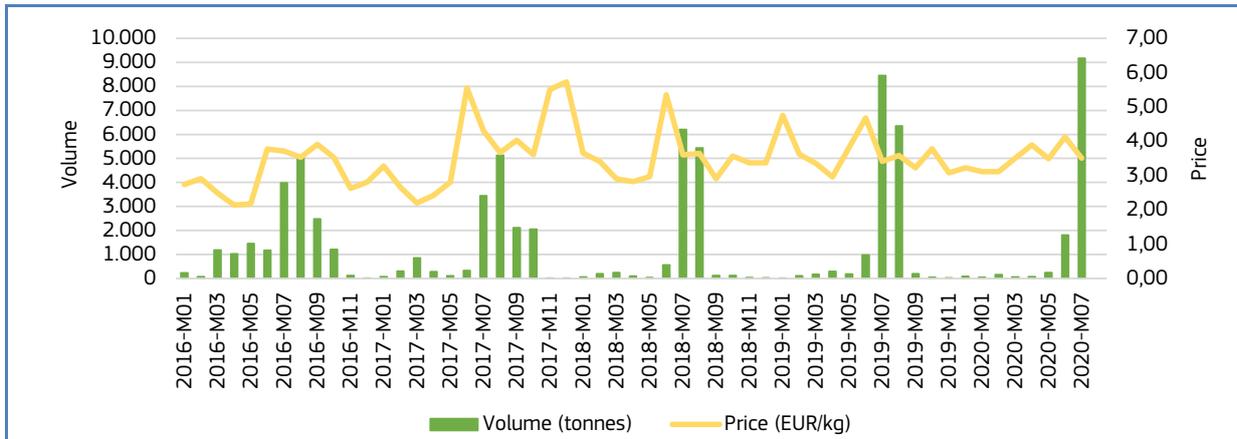
5.4. First sales in the EU

The monthly data for first sales (in auctions) highlights the strong seasonality of the albacore tuna fishery, with higher volumes sold in summer in both the main producing countries (Spain and France). In France, the fishery is open from July to October. In both countries, first-sales volumes peak in August to September. During the fishing season, monthly first-sales volumes in Spanish auctions fluctuate between 1.000 and 9.000 tonnes, whereas they are lower in France (between 300 and 1.800 tonnes). The main auctions for albacore tuna in Spain are held in Getaria, Fuenterrabía, and Avilés. In France, the main auctions are held in La Turballe, Saint-Jean-de-Luz, Lorient and Le Guilvinec.

The seasonality of supply leads to strong price fluctuations, especially in France where the fishing season is shorter. Prices usually drop when volumes are at their highest (in August to September) and sharply increase at the end of the fishing season.

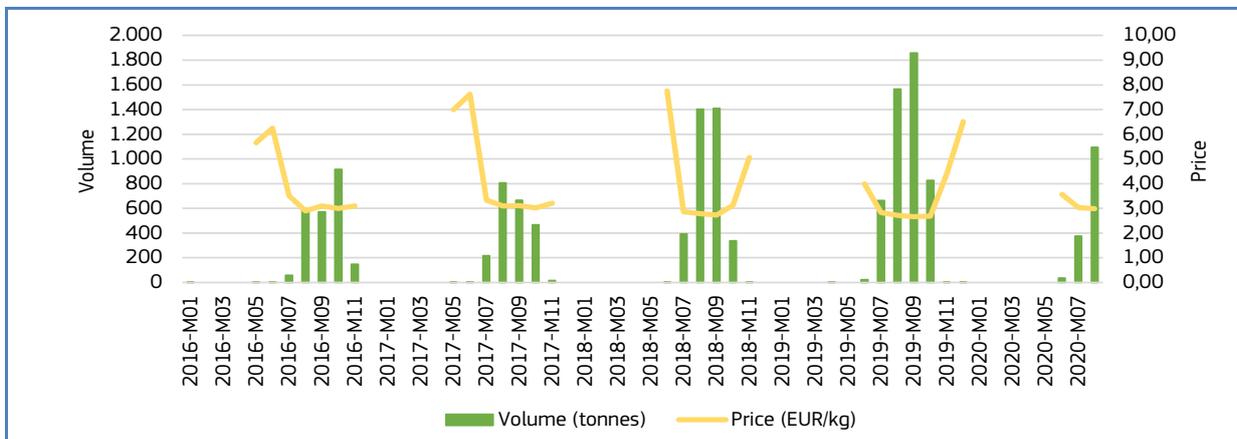
⁸⁸ Canned albacore tuna is excluded from this figure as it is not specifically reported in trade data (included in canned miscellaneous tuna).

Figure 47. **FIRST SALES OF ALBACORE TUNA IN SPAIN (volume in tonnes, price in EUR/kg)**



Source: EUMOFA.

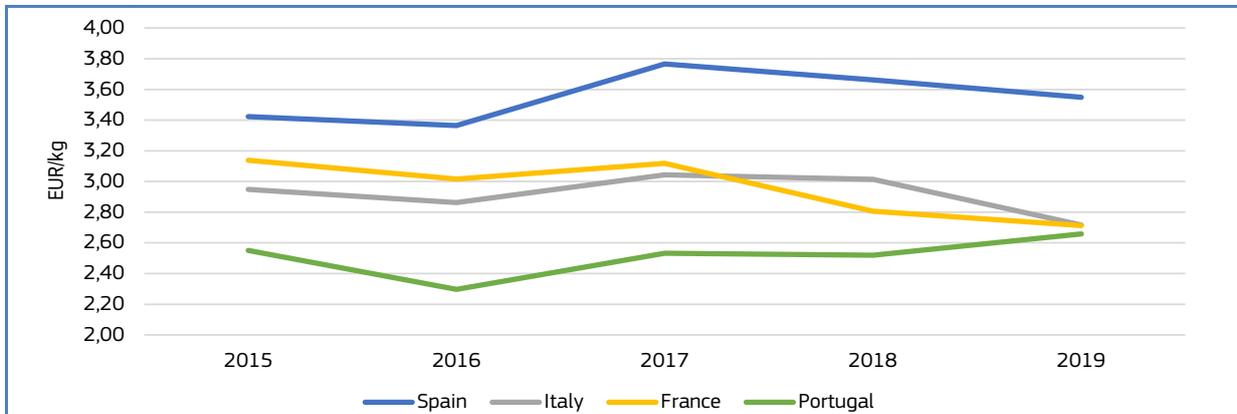
Figure 48. **FIRST SALES OF ALBACORE TUNA IN FRANCE (volume in tonnes, price in EUR/kg)**



Source: EUMOFA.

Over the 2015-2019 period, average yearly prices were higher in Spain (above 3,50 EUR/kg) than in France and Italy (2,50-3,00 EUR/kg), possibly due to higher prices achieved by pole-and-line Spanish landings. In Portugal, average prices were overall lower than in the above-mentioned countries but have recently increased, as opposed to a decreasing trend in other major countries, likely due to increased landings.

Figure 49. **AVERAGE YEARLY FIRST-SALES PRICES OF ALBACORE TUNA IN MAIN PRODUCING COUNTRIES (price in EUR/KG)**



Source: EUMOFA.

6. Global highlights

EUMOFA / Webinar: On 29 September, EUMOFA organised the online webinar, "Introduction to EUMOFA". EUMOFA experts gave guidance on how to obtain and use the data and information available on the EUMOFA website. Practical demonstrations were provided of how to access and extract data on first sales of turbot in France, Irish exports of live/fresh crab, household consumption of fresh products in the EU and indications of the effects of the COVID-19 crisis on those markets⁸⁹.



Source: EUROFISH.

Baltic Sea / Fisheries: The European Commission adopted a report on the multiannual plan (MAP) for the Baltic Sea. The Commission considers the MAP to have been helpful in implementing the common fisheries policy (CFP), including setting fishing opportunities. Due to the MAP, all fisheries are now either managed in line with maximum sustainable yield (MSY) or measures are in place to bring them back to MSY. Overall, the MAP provides a roadmap for the long-term profitability of the Baltic fishing industry⁹⁰.

EU / EMFF: In September, the European Parliament, the European Council and the European Commission reached an agreement on legislation that would allow fishers affected by the poor condition of certain fish stocks in the Baltic Sea to leave the fishing sector, with financial support from the European Maritime and Fisheries Fund (EMFF). The agreement will address the potentially severe economic impact of restrictive measures on vessel owners who are involved in two Baltic cod fisheries and the western Baltic herring fishery, which resulted in substantial reductions of fishing opportunities and the full closure of a targeted eastern Baltic cod fishery in July 2019⁹¹.

Romania / EMFF: Romania has modified its EMFF operational programme and allocated EUR 5 million of public support to compensate aquaculture companies for financial loss caused by the coronavirus outbreak. It is expected that over 160 aquaculture farms that have been economically affected by the coronavirus outbreak will benefit from the income support scheme. The scheme will help to mitigate shocks to the entire sector by avoiding staff reduction and suspension of activity⁹².

Cyprus / EMFF: Cyprus has modified its operational programme and reallocated EUR 1,6 million of public funds to compensate companies for financial loss caused by the coronavirus pandemic. The fisheries sector received EUR 0,5 million to compensate for economic losses from the cessation of fishing activity, mostly directed at small-scale coastal fishing vessels and multipurpose vessels. The aquaculture sector will receive approximately EUR 1,2 million⁹³.

Mediterranean / Sustainability: The European Commission adopted a proposal for fishing opportunities in the Mediterranean and Black Seas in 2021. The proposal includes the implementation of a multiannual management plan for demersal stocks in the western Mediterranean, and the continued reduction of fishing effort in the area. It also includes measures for eel, red coral, dolphinfish, small pelagic species and demersal stocks in the Adriatic Sea, and for deep-water red shrimp stocks in the Ionian Sea, Levant Sea and the Strait of Sicily⁹⁴.

USA / Consumption: In recent months, retail sales of packaged surimi products in the United States of America have been increasing substantially. This is a direct result of coronavirus outbreak, as consumers now want packaged, "protected" products that can be consumed at home. Surimi's shelf life is longer than that of fresh fish, it is easy to prepare, and it is affordable, making it appealing to consumers who want to continue consuming healthy fisheries and aquaculture products. On the other hand, roughly 70% of the surimi sold in the United States of America is in the form of salads, sold at delis and salad bars within the foodservice sector. Self-service salad bars experienced a 100% drop in sales as buffet and self-service options were banned as part of coronavirus control measures⁹⁵.

Iceland / Fisheries: Catch on Icelandic vessels in August 2020 was about 131.000 tonnes - demersal species accounted for 39.000 tonnes whilst pelagic catch accounted for 89.000 tonnes. The overall value of catch in August 2020 was 11% higher than in August 2019⁹⁶.

⁸⁹ <https://www.eumofa.eu/en/introduction-to-eumofa-webinar-video-recording-now-available>

⁹⁰ https://ec.europa.eu/fisheries/press/baltic-sea-commission-adopts-report-multiannual-plan_en

⁹¹ https://ec.europa.eu/fisheries/press/fisheries-eu-reaches-provisional-agreement-reducing-fishing-fleet-baltic-support-eu-funds_en

⁹² https://ec.europa.eu/fisheries/press/coronavirus-response-romanian-aquaculture-farmers-benefit-additional-emff-support_en

⁹³ https://ec.europa.eu/fisheries/press/coronavirus-response-cypriot-aquaculture-and-fisheries-sectors-benefit-additional-emff-support_en

⁹⁴ https://ec.europa.eu/fisheries/press/mediterranean-and-black-seas-commission-proposes-fishing-opportunities-2021_en

⁹⁵ <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1306825/>

⁹⁶ <https://statice.is/publications/news-archive/fisheries/fish-catch-in-august-2020/>

7. Macroeconomic Context

7.1. Marine fuel

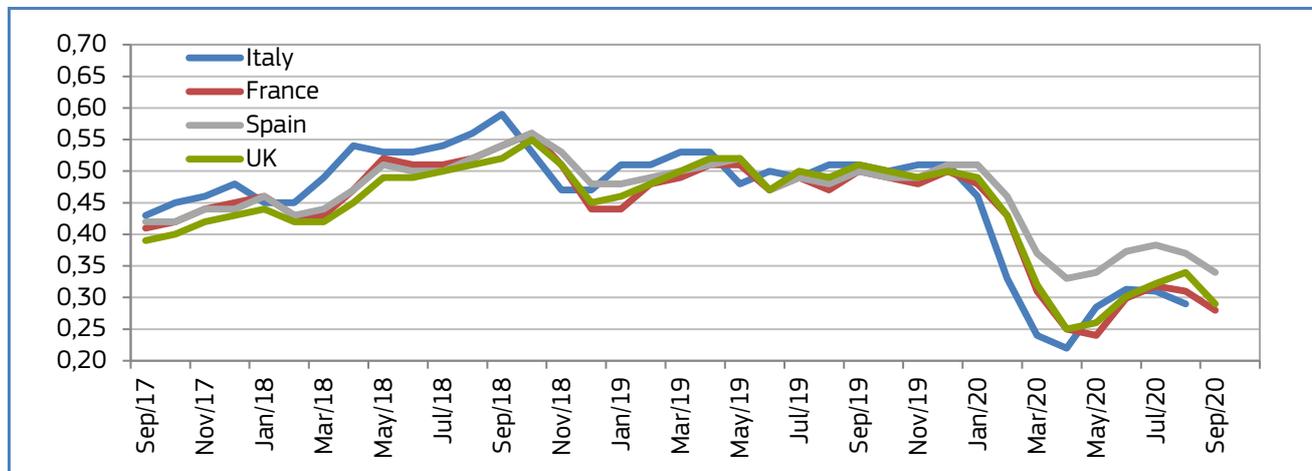
Average prices for marine fuel in **September 2020** ranged between 0,28 and 0,34 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices decreased about 10% compared with the previous month and 41% compared with the same month in 2019.

Table 34. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Sep 2020	Change from Aug 2020	Change from Sep 2019
France <i>(ports of Lorient and Boulogne)</i>	0,28	-10%	-44%
Italy <i>(ports of Ancona and Livorno)</i>	0,29	-6%	-43%
Spain <i>(ports of A Coruña and Vigo)</i>	0,34	-8%	-32%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,29	-15%	-43%

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

Figure 50. **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 0,4% in August 2020, down from 0,9% in July. A year earlier, the rate was 1,4%.

Inflation: lowest rates in August 2020, compared with July 2020.



Inflation: highest rates August 2020, compared with July 2020.



Table 35. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

HICP	Aug 2018	Aug 2019	Jul 2020	Aug 2020	Change from Jul 2020	Change from Aug 2019
Food and non-alcoholic beverages	104,20	107,04	109,30	108,99	↓ 0,3%	↑ 1,8%
Fish and seafood	109,14	111,43	112,66	113,05	↑ 0,3%	↑ 1,5%

Source: Eurostat.

7.3. Exchange rates

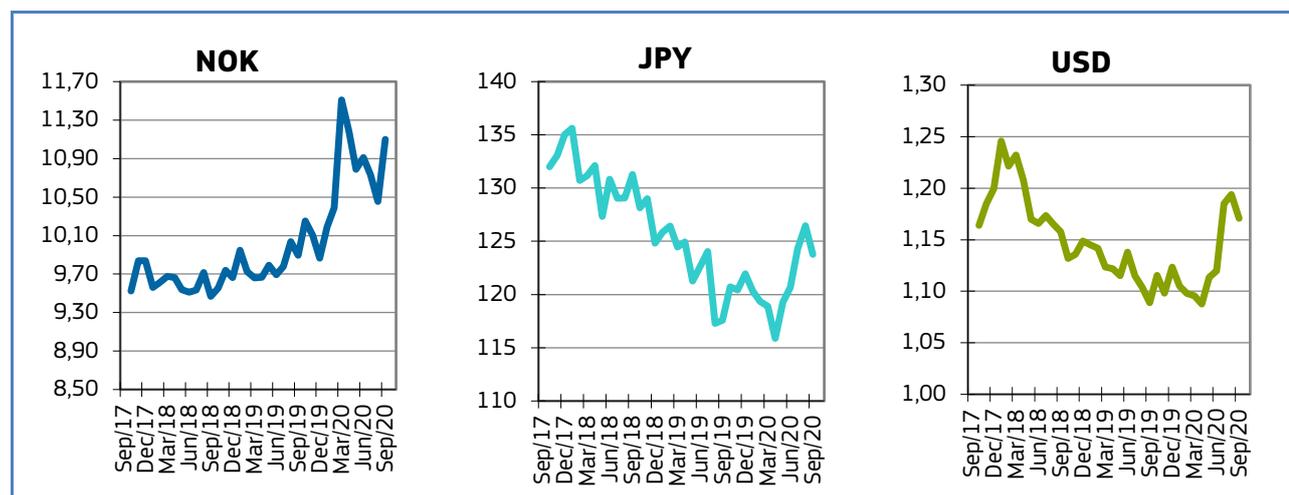
Table 36. EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Sep 2018	Sep 2019	Aug 2020	Sep 2020
NOK	9,5338	9,7778	10,9120	10,7323
JPY	130,84	121,04	120,66	124,31
USD	1,1736	1,1151	1,1198	1,1848

Source: European Central Bank.

In September 2020, the euro appreciated against the Norwegian krone and the US dollar (+6,2% and +0,1%, respectively), and depreciated against the Japanese yen (-2,1%) relative to the previous month. For the past six months, the euro has fluctuated around 1,15 against the US dollar. Compared with September 2019, the euro has appreciated 5,2% against the Japanese yen, 12,2% against the Norwegian krone, and 7,5% against the US dollar.

Figure 51. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

Manuscript completed in September 2020

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

First sales: European Commission, European Council, Ministry of Environment and Food of Denmark, Ministry of Marine Economy and Inland Navigation of Poland, International Council for Exploration of the Sea., FiskePleje.dk., FishBase.

Consumption: EUROPANEL.

Case studies: FAO, Worldometer, Our world in data, Seafood Tip, International Maritime Organization, ScienceDirect, Oceana, Lenfest Ocean Program, Global Fishing Watch, World Factbook, RPP Noticias, Undercurrent News, Seafood Source, Fishery Progress, Seafish, EFFOP, Research Gate, Kontali, IFFO, European Commission, EFTA, Intrafish, Guide des especes, Le Telegramme, EUROSTAT, Marine Stewardship Council.

Global highlights: DG Mare - European Commission, FAO, Statistics Iceland.

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

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

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

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

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

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

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

