

Monthly Highlights

No. 10 / 2020

EUMOPA

European Market Observatory for
Fisheries and Aquaculture Products

In this issue

According to data collected by EUMOPA from 13 EU Member States, in August 2020 Atlantic bluefin tuna and Atlantic bonito together accounted for 8% of the total first-sales value of the tuna and tuna-like species commodity group.

Since the beginning of 2020, the price of frozen squid from China has increased slightly, while its volume has decreased at a more significant rate.

Over the past three years, Polish consumers spent 30% less on a kg of fresh carp for household consumption (4,43 EUR/kg on average) than German consumers (6,29 EUR/kg).

During the second wave of the COVID-19 pandemic in the autumn of 2020, protective measures for workers in harvesting and packing operations within the aquaculture industry have driven up costs, while fall in demand has driven down prices.

Global production of brown shrimp amounted to 51.179 tonnes in 2018, caught exclusively by the EU fleet.

DG MARE is carrying out a public consultation on the revision of EU marketing standards regarding seafood products.



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1. First sales in Europe

During **January–August 2020**, 13 EU Member States (MS), Norway, and the United Kingdom reported first-sales data for 10 commodity groups¹. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section “*First sales in Europe*” are extracted from EUMOFA².

1.1. January–August 2020 compared to the same period in 2019

Increases in value and volume: Greece was the only surveyed country that recorded an increase of first sales in both value and volume terms. This was mainly due to a higher supply of small pelagics (anchovy and sardine).

Decreases in value and volume: Belgium, Denmark, France, Italy, Latvia, Poland, Portugal, and Sweden all recorded decreases in value and volume. Poland and Sweden stood out with the most significant drops in volume due to a lower supply of sprat, herring and cod.

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

Country	January–August 2018		January–August 2019		January–August 2020		Change from January–August 2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	9.054	39,29	8.782	37,95	7.800	36,77	-11%	-3%
Denmark	159.849	224,28	151.023	206,91	113.422	156,87	-25%	-24%
Estonia	31.109	7,43	34.999	7,69	34.162	9,34	-2%	21%
France	126.885	420,62	119.921	407,91	100.464	337,95	-16%	-17%
Greece	14.596	29,53	15.893	32,14	19.343	36,88	22%	15%
Italy	63.103	240,64	62.880	251,85	54.097	207,33	-14%	-18%
Latvia	25.381	4,81	35.154	5,86	27.233	5,39	-23%	-8%
Lithuania	1.187	0,92	713	0,56	1.106	0,53	55%	-6%
Netherlands	238.213	355,22	165.783	252,53	166.071	238,16	0%	-6%
Norway	2.122.566	1.650,52	1.934.761	1.725,08	2.068.598	1.658,42	7%	-4%
Poland	66.754	20,35	73.512	20,30	50.581	11,76	-31%	-42%
Portugal	75.230	171,18	80.354	186,27	63.201	153,09	-21%	-18%
Spain	336.634	928,55	339.990	965,91	344.461	942,77	1%	-2%
Sweden	154.010	69,12	136.233	63,92	85.629	50,53	-37%	-21%
UK	165.124	298,66	178.239	385,44	179.507	301,46	1%	-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.

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 21.10.2020.



1.2. August 2020 compared to August 2019

Increases in value and volume: First sales increased in Greece and Lithuania. Higher sales of anchovy and sardine were behind the sharp increase in Greece, while vimba bream, European perch, and European flounder were the main species responsible for growth in Lithuania.

Decreases in value and volume: First sales fell in Belgium, Denmark, France, Italy, Latvia, the Netherlands, Norway, Poland, Portugal, Spain, Sweden, and the United Kingdom. The most significant decreases were observed in Poland and Sweden, the countries impacted by reduced fishing opportunities in the Baltic Sea (mainly reductions in cod and herring Total Allowable Catches)³.

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

Country	August 2018		August 2019		August 2020		Change from August 2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.086	4,61	1.181	5,04	1.015	4,60	-14%	-9%
Denmark	38.751	39,50	36.382	41,19	30.614	32,57	-16%	-21%
Estonia	401	0,31	767	0,31	212	0,40	-72%	30%
France	16.546	55,29	15.246	54,35	12.860	47,15	-16%	-13%
Greece	1.363	3,26	2.107	3,87	2.782	5,49	32%	42%
Italy	6.752	28,26	7.252	30,12	5.618	25,24	-23%	-16%
Latvia	1.463	0,26	4.063	0,61	3.198	0,57	-21%	-7%
Lithuania	6	0,01	6	0,01	11	0,02	78%	106%
Netherlands	30.306	49,95	32.378	43,61	24.193	33,61	-25%	-23%
Norway	127.592	146,27	163.662	143,08	141.999	100,67	-13%	-30%
Poland	2.245	0,84	2.508	1,03	124	0,10	-95%	-91%
Portugal	16.778	27,82	16.045	31,53	12.853	25,57	-20%	-19%
Spain	54.458	140,04	50.835	143,98	49.847	137,41	-2%	-5%
Sweden	13.993	10,57	15.086	10,97	6.645	7,26	-56%	-34%
UK	29.664	45,57	30.006	56,59	25.709	42,87	-14%	-24%

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.

The most recent weekly first-sales data (**up to week 47 of 2020**) are available via the EUMOFA website, and can be accessed [here](#).

The most recent monthly first-sales data **for September 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**


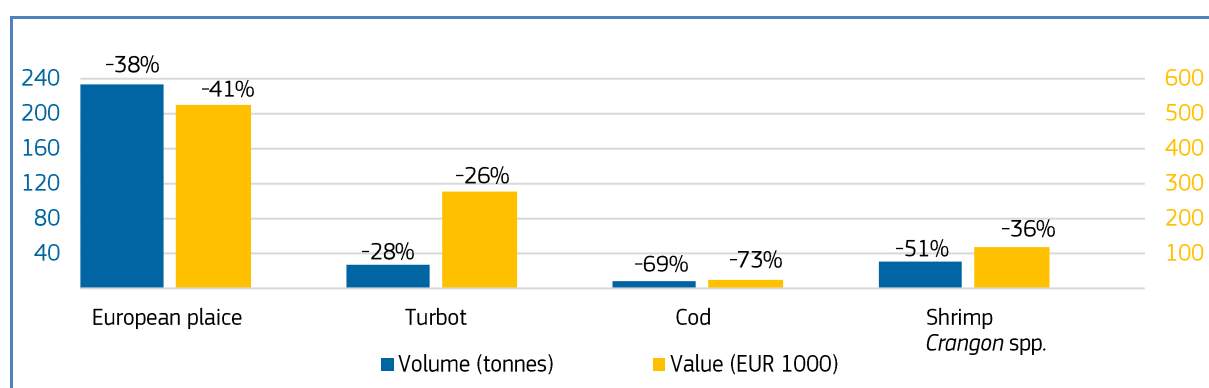
 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2020 vs Jan-Aug 2019	EUR 36,8 million, -3%	7.800 tonnes, -11%	European plaice, turbot, other sole (other than common sole), shrimp <i>Crangon</i> spp.
Aug 2020 vs Aug 2019	EUR 4,6 million, -9%	1.015 tonnes, -14%	European plaice, turbot, cod, shrimp <i>Crangon</i> spp.

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



Percentages show change from the previous year.

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


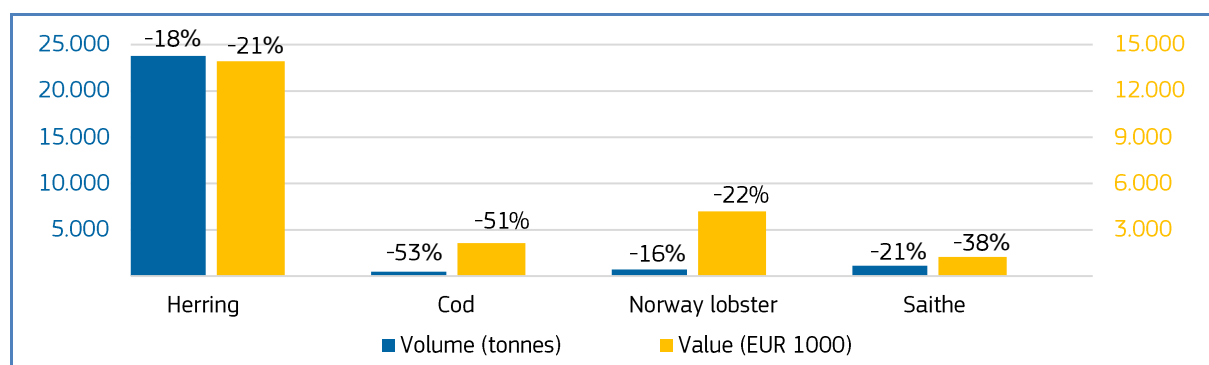
 Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2020 vs Jan-Aug 2019	EUR 156,9 million, -24%	113.422 tonnes, -25%	Norway lobster, cod, saithe, herring, mussel <i>Mytilus</i> spp., clam.
Aug 2020 vs Aug 2019	EUR 32,6 million, -21%	30.614 tonnes, -16%	Herring, cod, Norway lobster, saithe.

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



Percentages show change from the previous year.

⁴ First-sales data updated on 19.10.2020.

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



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


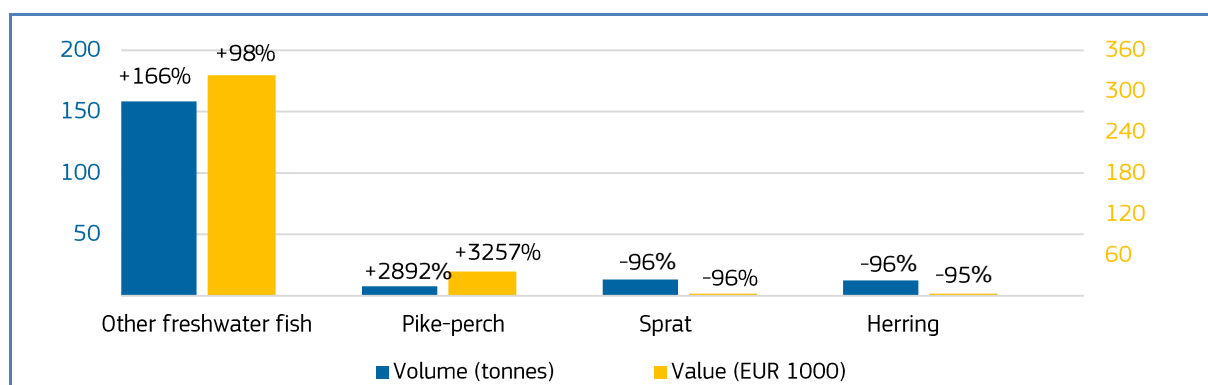
 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Aug 2020 vs Jan-Aug 2019	EUR 9,3 million, +21%	34.162 tonnes, -2%	Value: Pike-perch, smelt, other freshwater fish*. Volume: sprat, herring.	In August, fishing activities for small pelagic species (herring and sprat) in the Baltic Sea were relatively low due to fish quality being affected by high water temperatures. This usually causes a decrease in market demand. Moreover, total allocated catches for sprat in the Baltic Sea region fell by approximately 22% in 2020, compared to 2019. This also affected herring catches, as herring is caught in sprat fisheries. Due to these factors, suppliers re-evaluated their plan for herring and sprat fishing in August 2020.
Aug 2020 vs Aug 2019	EUR 0,4 million, +30%	212 tonnes, -72%	Value: other freshwater fish*, pike-perch. Volume: sprat, herring.	

Figure 3. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, AUGUST 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


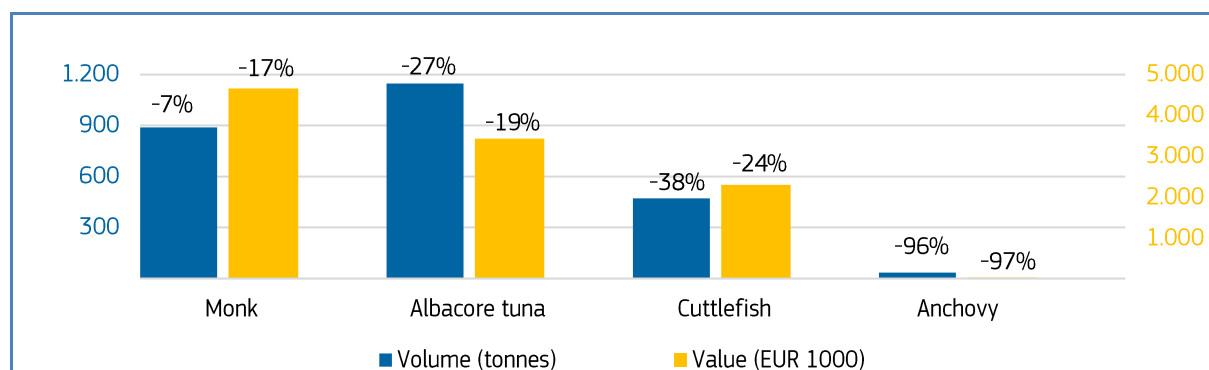
 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2020 vs Jan-Aug 2019	EUR 338 million, -17%	100.464 tonnes, -16%	Monk, hake, squid, John dory, whiting.
Aug 2020 vs Aug 2019	EUR 47,1 million, -13%	12.860 tonnes, -16%	Monk, albacore tuna, cuttlefish, anchovy.

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

Percentages show change from the previous year.

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


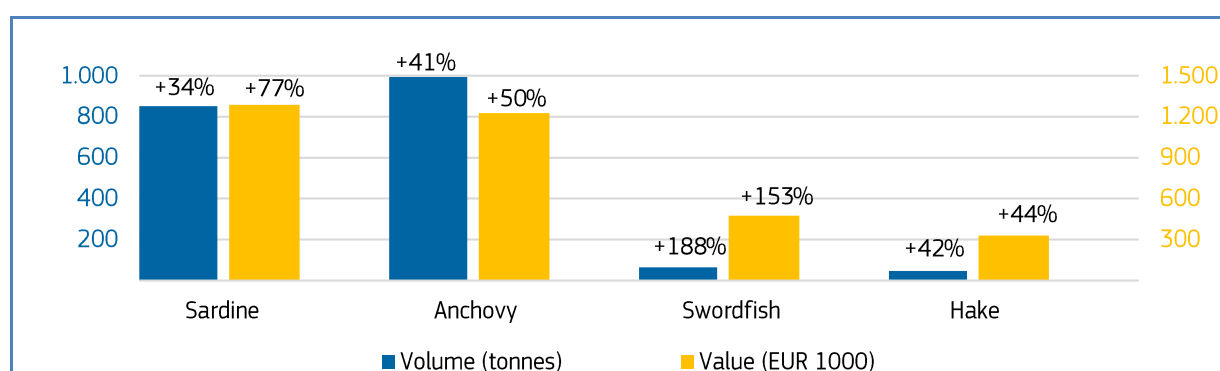
 Greece	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2020 vs Jan-Aug 2019	EUR 36,9 million, +15%	19.343 tonnes, +22%	Anchovy, sardine, hake, octopus, mackerel.
Aug 2020 vs Aug 2019	EUR 5,5 million, +42%	2.782 tonnes, +32%	Sardine, anchovy, swordfish, hake.

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

Percentages show change from the previous year.

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


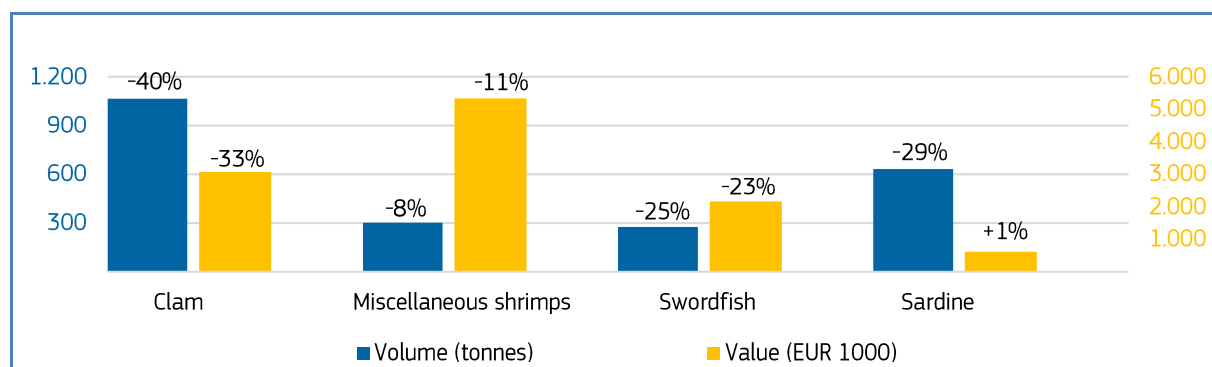
 Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2020 vs Jan-Aug 2019	EUR 207,3 million, -18%	54.097 tonnes, -14%	Miscellaneous shrimps*, anchovy, clam, octopus, cuttlefish, sardine.
Aug 2020 vs Aug 2019	EUR 25,2 million, -16%	5.618 tonnes, -23%	Clam, miscellaneous shrimps*, swordfish, sardine.

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, AUGUST 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 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA**


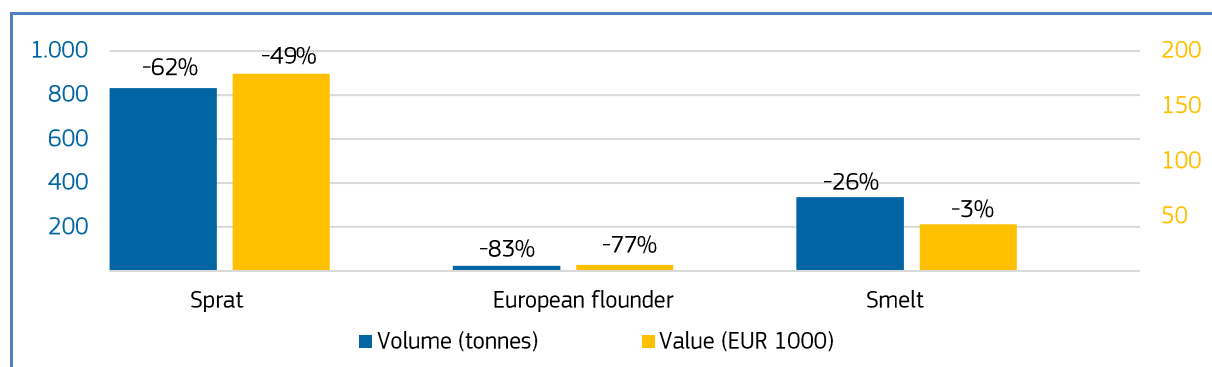
 Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Aug 2020 vs Jan-Aug 2019	EUR 5,4 million, -8%	27.233 tonnes, -23%	Sprat, European flounder, herring, cod, smelt.	Restrictions set by the Council Regulation (EU) 2019/1838 of 30 October 2019, which prohibited any catches of cod in subdivisions 25 and 26 of the Baltic Sea in all fisheries for vessels of more than 12 metres length, caused a partial halt to fishing for sprat suppliers in August 2020. Some suppliers also took this as an opportunity for a voluntary break in fishing activities, and to access financial compensation.
Aug 2020 vs Aug 2019	EUR 0,6 million, -7%	3.198 tonnes, -21%	Sprat, European flounder, smelt.	

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

Percentages show change from the previous year.

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


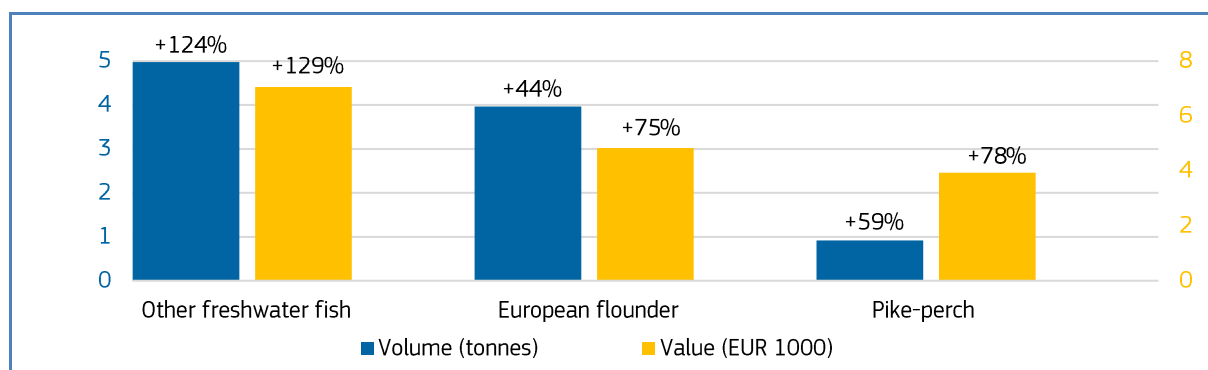
 Lithuania	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2020 vs Jan-Aug 2019	EUR 0,5 million, -6%	1.107 tonnes, +55%	Value: smelt, cod, turbot. Volume: herring, sprat, other marine fish*.
Aug 2020 vs Aug 2019	EUR 0,02 million, +106%	11 tonnes, +78%	Other freshwater fish*, European flounder, pike-perch.

Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, AUGUST 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 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS**


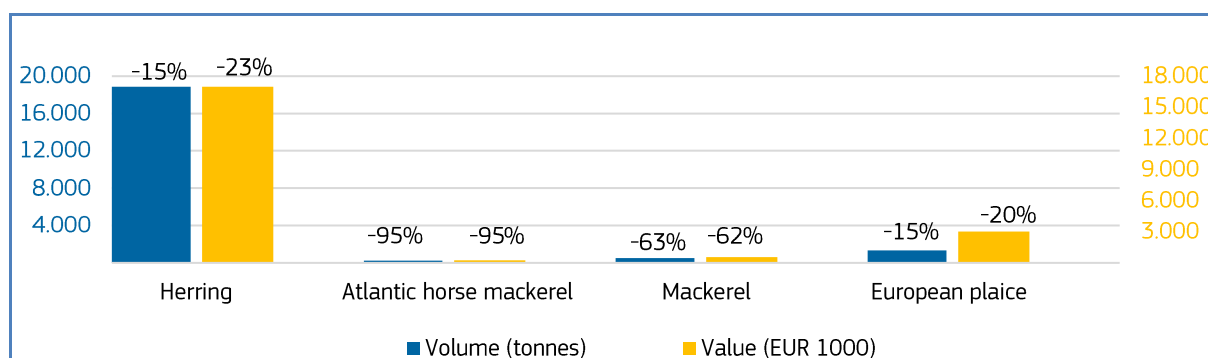
 The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Aug 2020 vs Jan-Aug 2019	EUR 238,2 million, -6%	166,071 tonnes, 0%	Value: Atlantic horse mackerel, common sole, blue whiting. Volume: herring, mackerel, sardine.	Dutch production of Atlantic horse mackerel and mackerel is characterised by strong inter-annual fluctuations. During the first 8 months of 2020, total Atlantic horse mackerel production dropped by 52%. This was in line with the reduction of fishing opportunities ⁶ by the European Commission, following the management strategy of the Pelagic Advisory Council ⁷ . Another key factor behind decreased production of Atlantic horse mackerel and mackerel was the reduced use of total Dutch pelagic quota in August 2020, as storage capacity was almost filled during the first COVID-19 wave.
Aug 2020 vs Aug 2019	EUR 33,6 million, -23%	24,193 tonnes, -25%	Herring, Atlantic horse mackerel, mackerel, European plaice.	

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

Percentages show change from the previous year.

⁶ https://ec.europa.eu/commission/presscorner/detail/en/IP_19_6151

⁷ <https://www.pelagic-ac.org/media/pdf/1920PAC05%20PELAC%20Consult%20fish%20opport%202020.pdf>



Table 12. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY


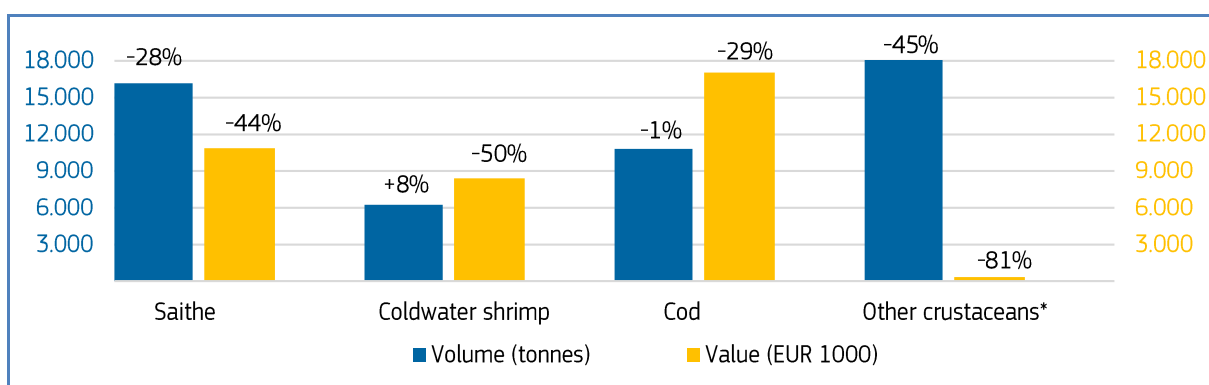
 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2020 vs Jan-Aug 2019	EUR 1.658,4 million, -4%	2.068.598 tonnes, +7%	Value: coldwater shrimp, cod, haddock. Volume: other groundfish*, mackerel, redfish.
Aug 2020 vs Aug 2019	EUR 100,7 million -30%	141.999 tonnes, -13%	Saithe, coldwater shrimp, cod, other crustaceans*.

Figure 10. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, AUGUST 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 13. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND


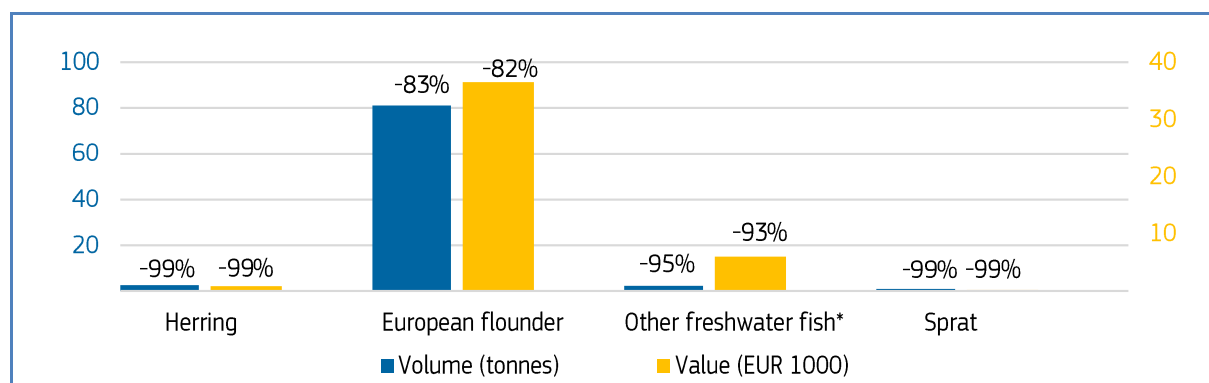
 Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Aug 2020 vs Jan-Aug 2019	EUR 11,8 million, -42%	50.581 tonnes, -31%	Cod, herring, European flounder, sprat.	The Polish Baltic fleet's fishing efforts for August 2020 in ICES areas 25-26 of the Baltic Sea halted after amendments of Polish national legislation to be in line with the 30 October 2019 provisions stated in Council Regulation (EU) 2019/1838, which banned fishing for cod – even as bycatch. This resulted in cessation of all fishing activities that would potentially affect cod's spawning. Only a small amount (2.577 kg) of herring was supplied, from an area which did not fall under the fishing prohibition.
Aug 2020 vs Aug 2019	EUR 0,09 million -91%	124 tonnes, -95%	Herring, European flounder, other freshwater fish*, sprat.	

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, AUGUST 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 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL**


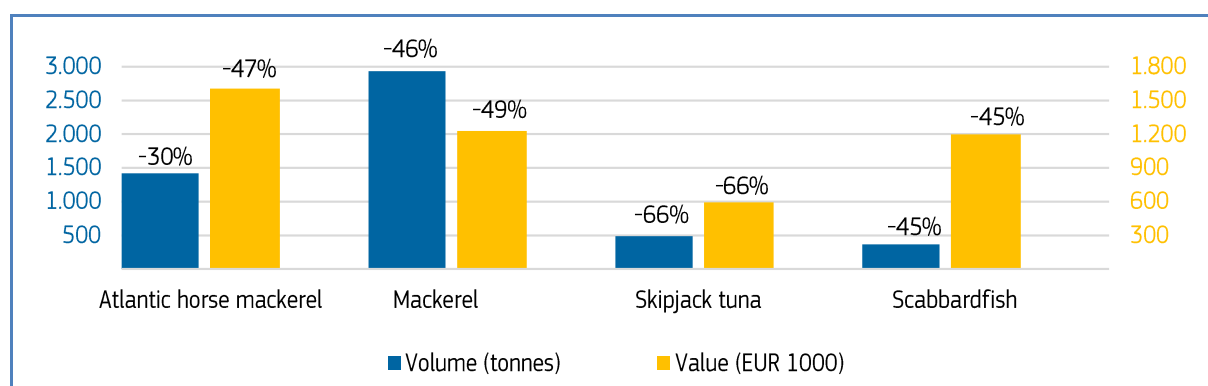
 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2020 vs Jan-Aug 2019	EUR 153,1 million, -18%	63.201 tonnes, -21%	Anchovy, octopus, mackerel, albacore tuna, Atlantic horse mackerel.
Aug 2020 vs Aug 2019	EUR 25,6 million, -19%	12.853 tonnes, -20%	Atlantic horse mackerel, mackerel, skipjack tuna, scabbardfish.

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

Percentages show change from the previous year.

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


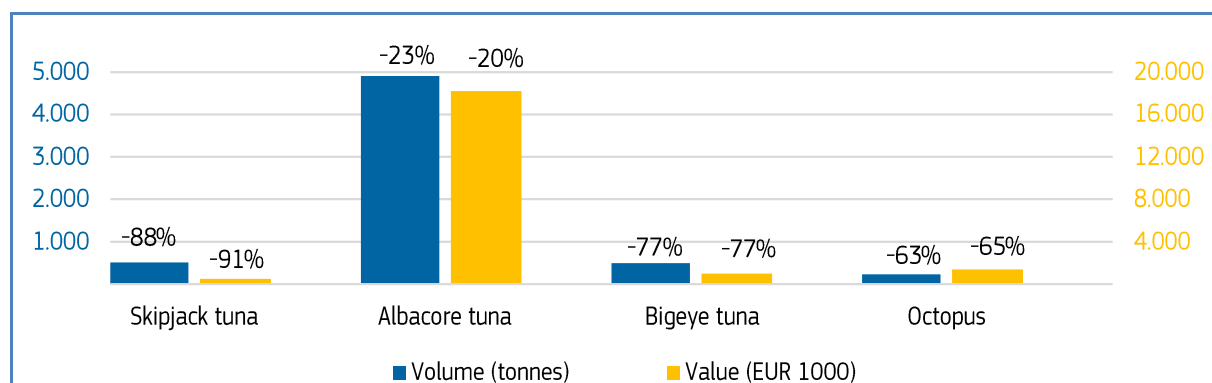
 Spain	First-sales value / trend in %	First-sales volume / trend %	Main contributing species	Notes
Jan-Aug 2020 vs Jan-Aug 2019	EUR 942,8 million, -2%	344.461 tonnes, +1%	Value: hake, octopus, clam. Volume: hake, anchovy, bigeye tuna.	Spanish fleet catches of skipjack tuna and other tuna-like species usually derive from fishing activity in the Pacific. In July 2020, due to COVID-19 outbreak, 12 Spanish vessels targeting skipjack tuna in the Seychelles were confined, provoking delays in the usual landings' flow, and thus affecting first sales in August.
Aug 2020 vs Aug 2019	EUR 137,4 million, -5%	49.847 tonnes, -2%	Skipjack tuna, albacore tuna, bigeye tuna, octopus.	



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



Percentages show change from the previous year.

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


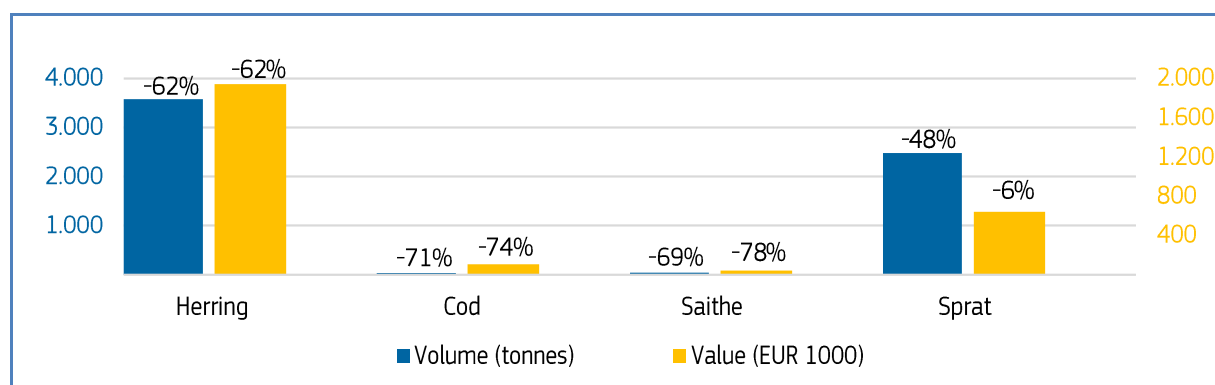
 Sweden	First-sales value / trend in %	First-sales volume / trend %	Main contributing species	Notes
Jan-Aug 2020 vs Jan-Aug 2019	EUR 50,5 million, -21%	85.629 tonnes, -37%	Herring, sprat, cod, Norway lobster.	Compared to 2019, Total Allowable Catches of herring for 2020 ⁸ fell by approximately 27% for all fishing areas where Baltic region countries could potentially operate. In addition, the Council Regulation (EU) 2019/1838 restricted fishing for cod, even as a bycatch - meaning that all fishing activities that would potentially affect cod's spawning ceased, thus potentially explaining part of the fall in first sales.
Aug 2020 vs Aug 2019	EUR 7,3 million, -34%	6.645 tonnes, -56%	Herring, cod, saithe, sprat.	

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



Percentages show change from the previous year.

⁸ <https://www.consilium.europa.eu/en/press/press-releases/2019/10/15/baltic-sea-council-agreement-on-2020-catch-limits/>

Table 17. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM**


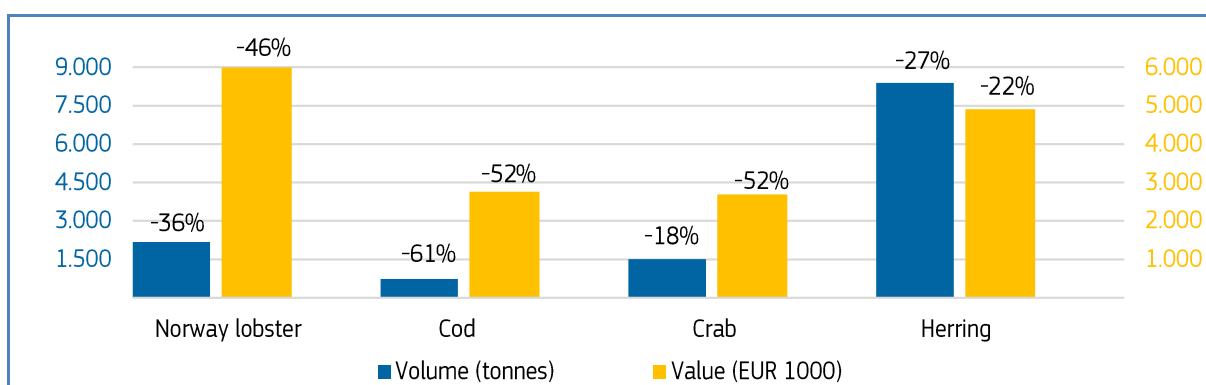
 the United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Aug 2020 vs Jan-Aug 2019	EUR 301,5 million, -22%	179.507 tonnes, +1%	Value: Norway lobster, crab, cod. Volume: mackerel, blue whiting.	In January-August 2020, significant decreases in crab first-sales value and volume were recorded, in comparison with the same period in 2019. One reason for this trend could be the sharp decline in demand from Asia, (the shellfish market in the UK is dominated by Asian demand).
Aug 2020 vs Aug 2019	EUR 42,9 million, -24%	25.709 tonnes, -14%	Norway lobster, cod, crab, herring.	

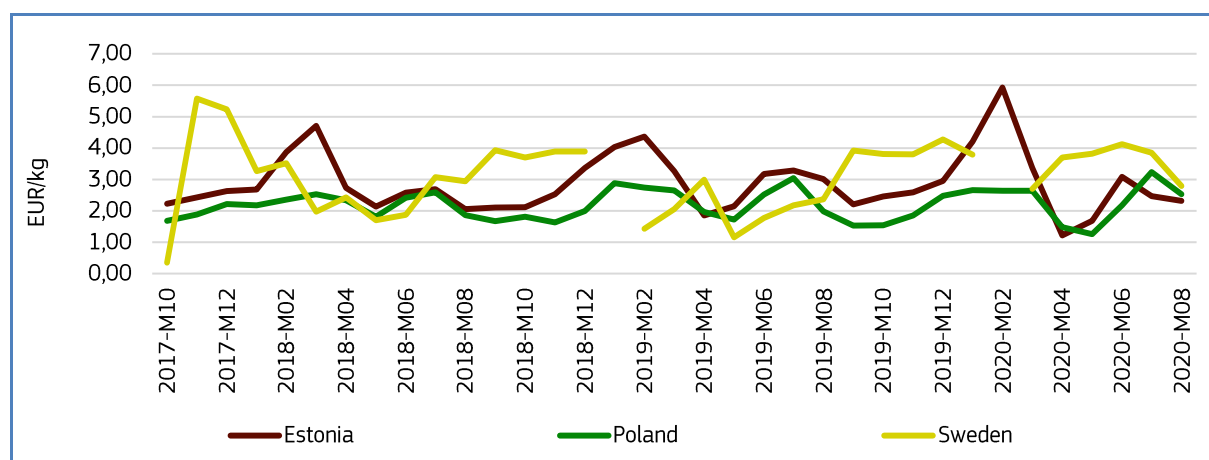
Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, AUGUST 2020**

Percentages show change from the previous year.



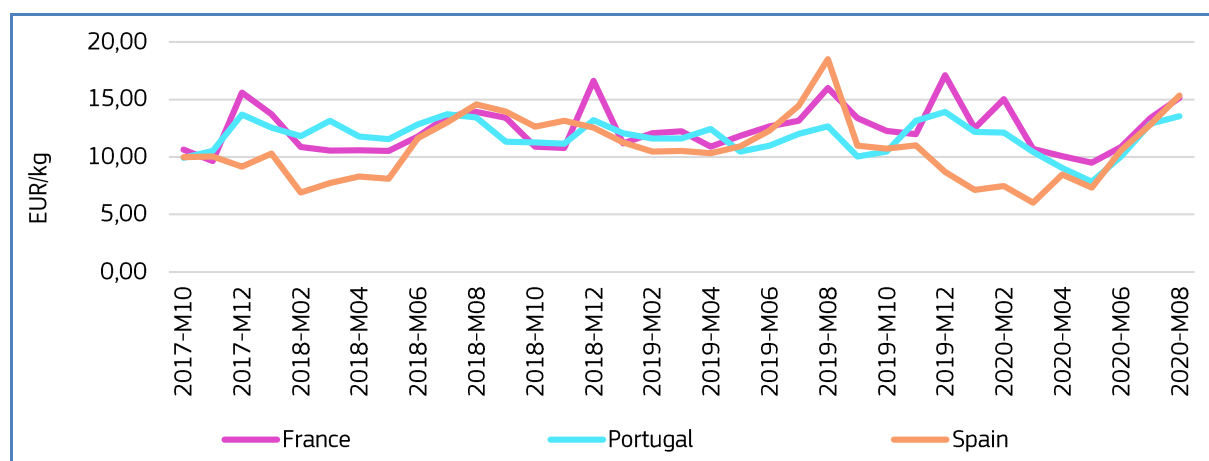
1.4. Comparison of first-sales prices of selected species in selected countries⁹

Figure 16. **FIRST-SALES PRICES OF EUROPEAN PERCH IN ESTONIA, POLAND, AND SWEDEN**



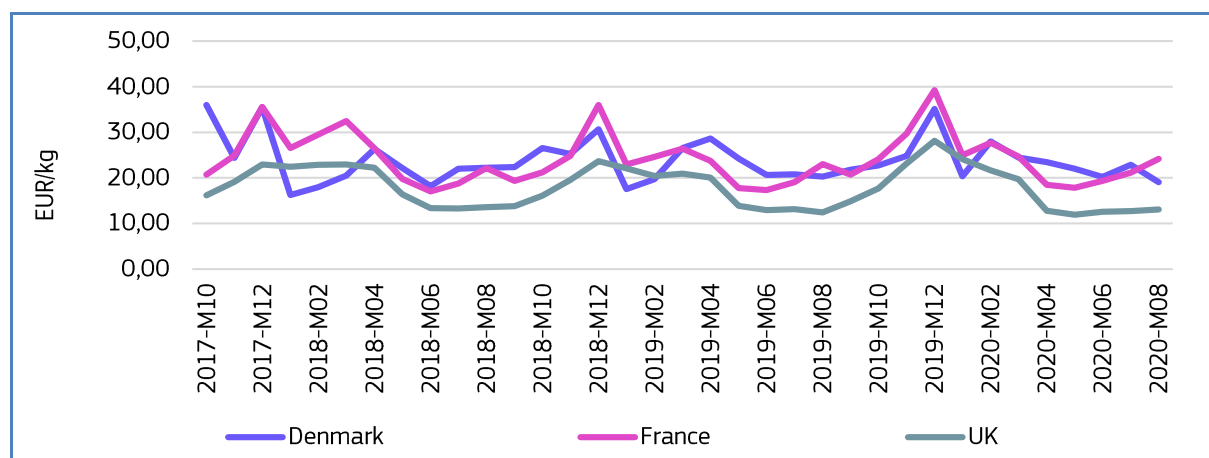
First sales of **European perch** mainly occur in **Estonia, Poland** and **Sweden**. The average prices in August 2020 (the most recent available data) were: 2,31 EUR/kg in Estonia (down from July 2020 and August 2019, by 6% and 23%, respectively), and 2,53 EUR/kg in Poland (down by 22% from the previous month and up by 27% from the previous year). In Sweden, the average price was 2,79 EUR/kg (27% lower from July 2020 and 18% up from August 2019). In August 2020, first-sales volume increased in Estonia by 150% and decreased in Poland and Sweden (by 95% and 79%, respectively), from the previous year. European perch 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 fell, most significantly in Poland and Sweden.

Figure 17. **FIRST-SALES PRICES OF JOHN DORY IN FRANCE, PORTUGAL, AND SPAIN**



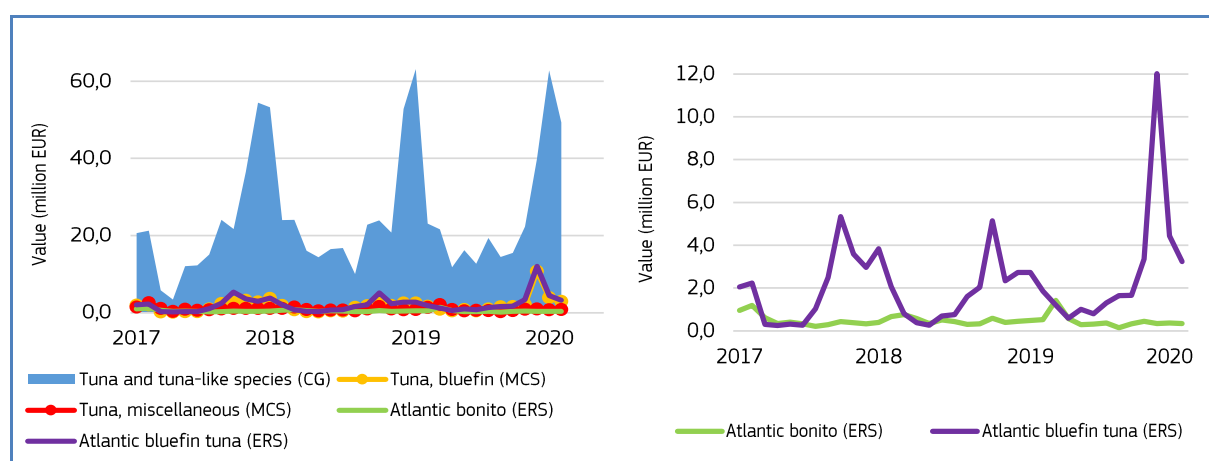
EU first sales of **John dory** occur predominately in **France**, as well as in **Portugal** and **Spain**. In August 2020, the average first-sales prices of John dory were: 15,14 EUR/kg in France (up by 13% from the previous month, and down by 5% from the previous year); 13,55 EUR/kg in Portugal (up from both the previous month and year by 5% and 7%, respectively); and 15,33 EUR/kg in Spain (20% higher than July 2020, and 17% lower than August 2019). In August 2020, supply decreased in France (-4%) and increased in Portugal (+5%), as well as in Spain (+16%) from August 2019. Over the past 36 months, John dory prices have increased slightly in Spain, significantly in France, and decreased in Portugal. Over the same period, supply increased in Portugal, remained stable in Spain, and decreased in France. First-sales volume is seasonal, with peaks in June-August in France, July-October in Portugal, and April-June in Spain.

⁹ First sales data updated on 21.10.2020.

Figure 18. **FIRST-SALES PRICES OF LOBSTER (*HOMARUS* SPP.) IN DENMARK, FRANCE, AND THE UK**

EU first sales of **lobster** (*Homarus* spp.) occur in multiple countries, including **Denmark**, **France**, and **the UK**. In August 2020, the average first-sales prices of lobster were: 19,03 EUR/kg in Denmark (down from both the previous month and year by 17% and 6%, respectively); 24,15 EUR/kg in France (up by 14% from July 2020 and up by 5% from August 2019); 13,05 EUR/kg in the UK (up from both July 2020 and August 2019, by 3% and 5%, respectively). In August 2020, supply increased in Denmark (+65%) and decreased in France (-24%), as well as in the UK (-18%) from August 2019. Over the past 36-month period, prices decreased in all markets. Over the past three years, supply decreased in Denmark, and increased in France and the UK. Supply is seasonal, with peaks in summer: June-July in France, July-August in the UK, and June and September in Denmark.

1.5. Commodity group of the month: tuna and tuna-like species¹⁰

Figure 19. **FIRST-SALES COMPARISON AT CG LEVEL, MCS LEVEL, AND ERS LEVEL FOR REPORTING COUNTRIES, SEPTEMBER 2017 - AUGUST 2020**

The **“tuna and tuna-like species”** commodity group (CG¹¹) ranked the 4th in value and 3rd in volume for first sales of the 10 CGs in May 2020¹². First sales reached a value of EUR 49,3 million and a volume of 14.357 tonnes, representing decreases of 22% and 36%, respectively, when compared to August 2019. In the past 36 months, the highest first-sales value of tuna and tuna-like species was registered at EUR 63,1 million (August 2019).

¹⁰ First sales data updated on 21.10.2020.

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

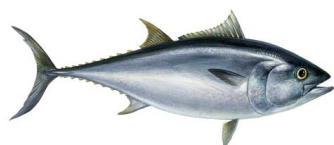
¹² More data on commodity groups can be found in the Annex.



The tuna and tuna-like species commodity group includes 7 main commercial species (MCS): albacore, bigeye, bluefin, skipjack, yellowfin, miscellaneous tuna species¹³, and swordfish. Pelagic shark species, normally regarded as tuna-like species, are not included in the tuna and tuna-like species commodity group.

At Electronic Recording and Reporting System (ERS) level, Atlantic bluefin tuna (7%) and Atlantic bonito (1%) together accounted for 8% of the total reported first-sales value of the tuna and tuna-like commodity group in August 2020.

1.6. Focus on Atlantic bluefin tuna



Atlantic bluefin tuna (*Thunnus thynnus*) is a species of tuna in the family Scombridae. It is native to both the western and eastern Atlantic Ocean, as well as the Mediterranean Sea. The species is a warm-blooded fish and can live for up to 40 years and grow to over 4 metres in length and 600 kg in weight. Typical specimens are around 2,5 metres long and weigh around 350 kg. Like other tunas, bluefin is highly migratory. Atlantic bluefin

tuna are divided into two stocks, Eastern and Western. Eastern bluefin tuna reaches sexual maturity at around four years, and spawns in June. The main fishing season for the Eastern stock corresponds to the spring spawning season, when the fish come to the surface to form shoals, with most of the annual catch in the Mediterranean being taken in as little as six weeks.

In the EU, bluefin is exploited using longlines, purse seines, assorted hook-and-line gear, heavy rods and reels, and harpoons. The Mediterranean industrial purse seine fishery accounts for more than 70% of the annual EU catch. The purse seine fleet is based in a small number of ports in Croatia, France, Italy, Spain and Malta. Tuna caught using this method are usually transferred to cages at sea for fattening, before being sold. The fishing season in the eastern Atlantic and the Mediterranean lasts from 26 May to 24 June, with the exception of the Norwegian exclusive economic zone, where fishing occurs from 25 June to 31 October. The bluefin tuna fishery is regulated by the International Commission for the Conservation of Atlantic Tunas (ICCAT), where the EU is a contracting party. In 2016, the EU adopted a regulation on a multiannual recovery plan for bluefin tuna in the eastern Atlantic and the Mediterranean, which applies from 2007 to 2022 and was recommended by ICCAT¹⁴. Bluefin tuna is managed with Total Allowable Catches (EU TAC in 2020 is 36.000 tonnes¹⁵), a minimum conservation reference size – which is 30 kg in the Mediterranean (a derogation of 8 kg applies to artisanal fishing by baitboats, longliners and handliners in the Mediterranean Sea and in the Adriatic Sea fishery for farming purposes) and strict control and enforcement by national authorities and EU and international authorities¹⁶.

We have covered **Atlantic bluefin tuna** in previous *Monthly Highlights*:

Extra-EU export: (11/2016).

Topic of the month: “Atlantic bluefin tuna market in the EU” (7/2016).

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

¹⁴ Regulation (EU) 2016/1627 <https://eur-lex.europa.eu/eli/reg/2016/1627/oj>

¹⁵ COUNCIL REGULATION (EU) 2020/123 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32020R0123&from=EN>

¹⁶ https://ec.europa.eu/fisheries/bluefin-tuna-season-2018-eu-determined-maintain-control-standards-and-guarantee-recovery-trend_en

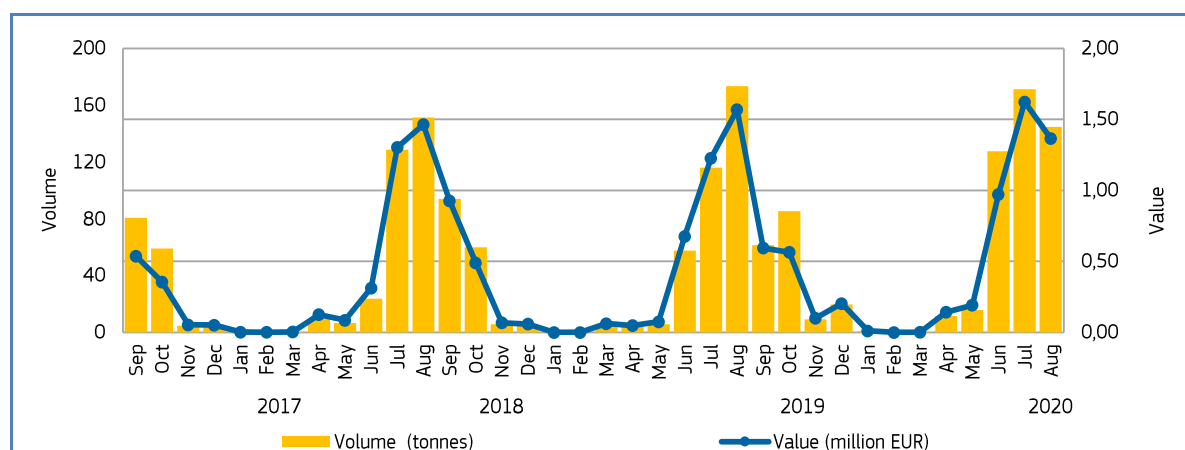


Selected countries

Table 18. **COMPARISON OF ATLANTIC BLUEFIN TUNA FIRST-SALES PRICES, MAIN PLACES OF SALE AND CONTRIBUTION TO OVERALL SALES OF TUNA AND TUNA-LIKE SPECIES IN FRANCE, ITALY AND SPAIN.**

Atlantic bluefin tuna		Changes in first-sales Jan-Aug 2020 (%)		Contribution of Atlantic bluefin tuna to total tuna and tuna-like species first sales in August 2020 (%)	Principal places of sale Jan-Aug 2020 in terms of first-sales value
		Compared to Jan-Aug 2019	Compared to Jan-Aug 2018		
France	Value	+18%	+31%	27%	Saint-Jean-de-Luz, Les Sables-d'Olonne, Le Gruau-du-Roi.
	Volume	+31%	+47%	11%	
Italy	Value	+14%	+16%	11%	Marsala, Pescara, Porticello.
	Volume	+22%	+30%	6%	
Spain	Value	+99%	+55%	4%	Cadiz, Santa Cruz de Tenerife, Algeciras.
	Volume	+77%	+55%	1%	

Figure 20. **ATLANTIC BLUEFIN TUNA: FIRST SALES IN FRANCE, SEPTEMBER 2017 - AUGUST 2020**



In **France**, the highest Atlantic bluefin tuna first sales were from June to September every year over the past 36 months. In the past three years, the Total Allowable Catch (TAC) has increased, and in 2020 it reached 6.027 tonnes for France. The French fishing fleet authorised to fish bluefin tuna in 2020 comprises 22 purse seiners, 8 longliners, 57 pelagic trawlers and 130 small-scale fishing boats.



Figure 21. **FIRST SALES: COMPOSITION OF TUNA AND TUNA-LIKE SPECIES (ERS LEVEL) IN FRANCE IN VALUE AND VOLUME, AUGUST 2020**

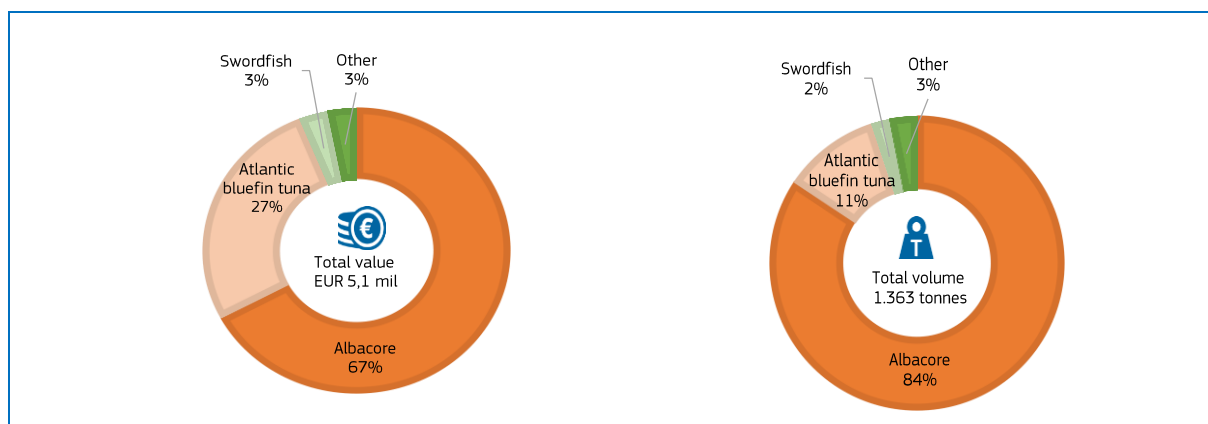
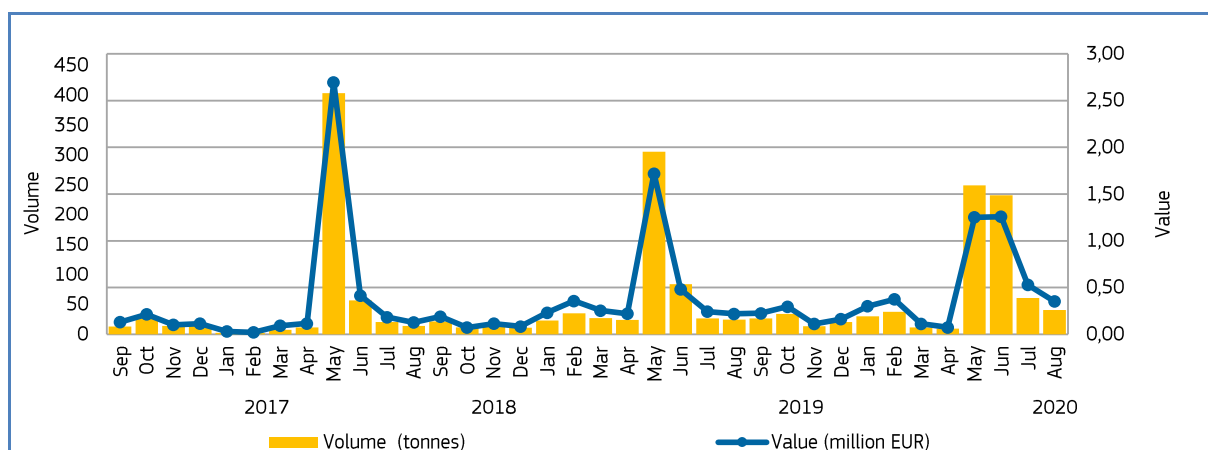


Figure 22. **ATLANTIC BLUEFIN TUNA: FIRST SALES IN ITALY, SEPTEMBER 2017-AUGUST 2020**



In **Italy**, the highest first sales of Atlantic bluefin tuna were in May and June every year over the past 36 months, when the purse seine tuna fishery is operational. In 2020, the TAC for Italy was set at 4.756 tonnes. The Italian fishing fleet authorised to fish bluefin tuna in 2020 comprises 19 purse seiners and 35 longliners.

Figure 23. **FIRST SALES: COMPOSITION OF TUNA AND TUNA-LIKE SPECIES (ERS LEVEL) IN ITALY IN VALUE AND VOLUME, AUGUST 2020**

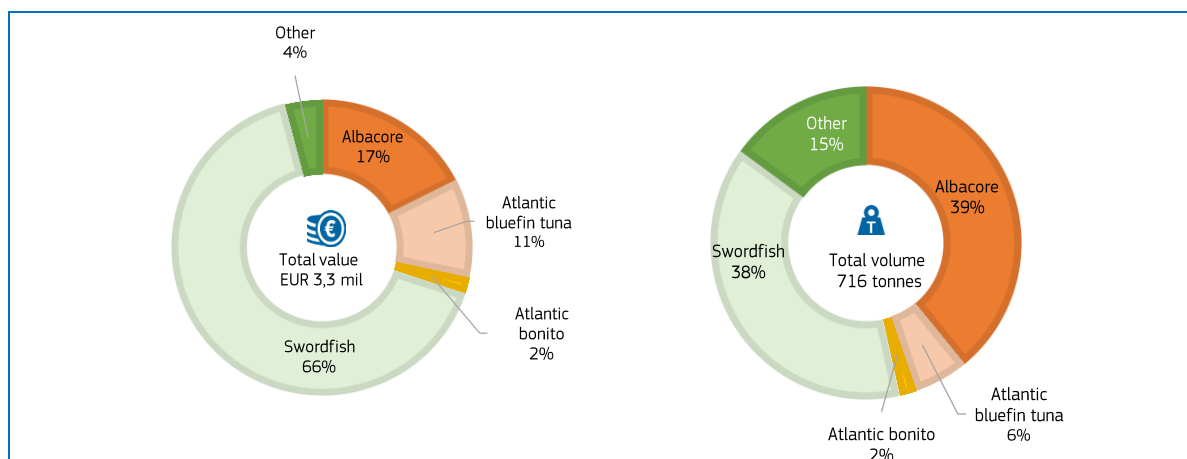
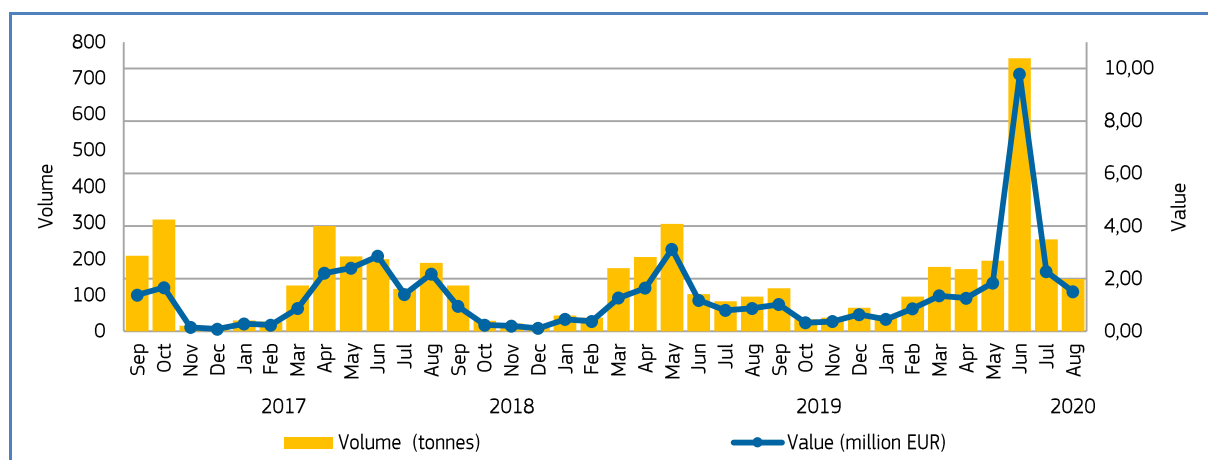


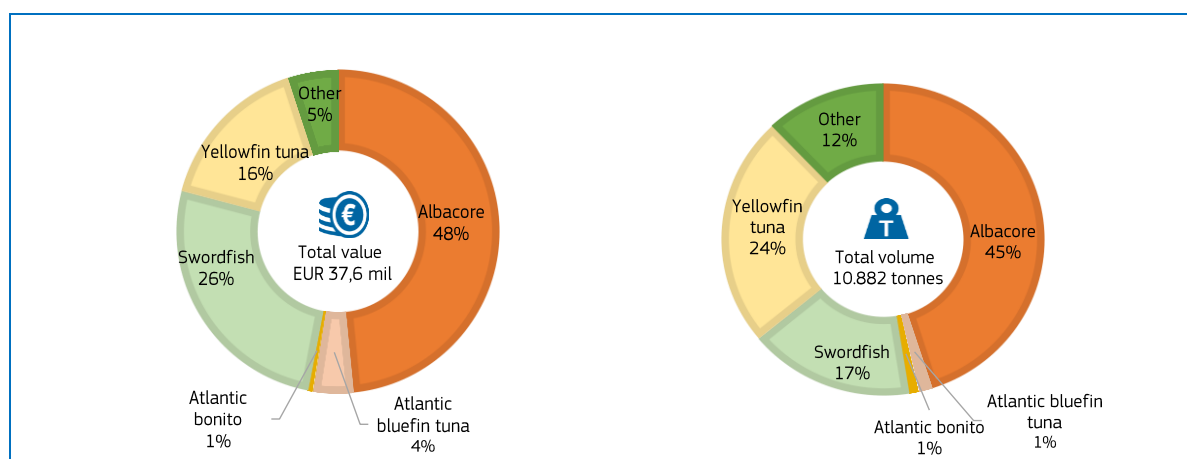


Figure 24. ATLANTIC BLUEFIN TUNA: FIRST SALES IN SPAIN, SEPTEMBER 2017-AUGUST 2020



In **Spain** over the past 36 months, the highest first sales of Atlantic bluefin tuna occurred from March to September every year. A peak was observed in 2020, due to increased Total Allowable Catch, which was set at 6.108 tonnes for Spain. The Spanish fishing fleet authorised to fish bluefin tuna in 2020 comprises 6 purse seiners, 49 longliners, and 599 small-scale fishing boats.

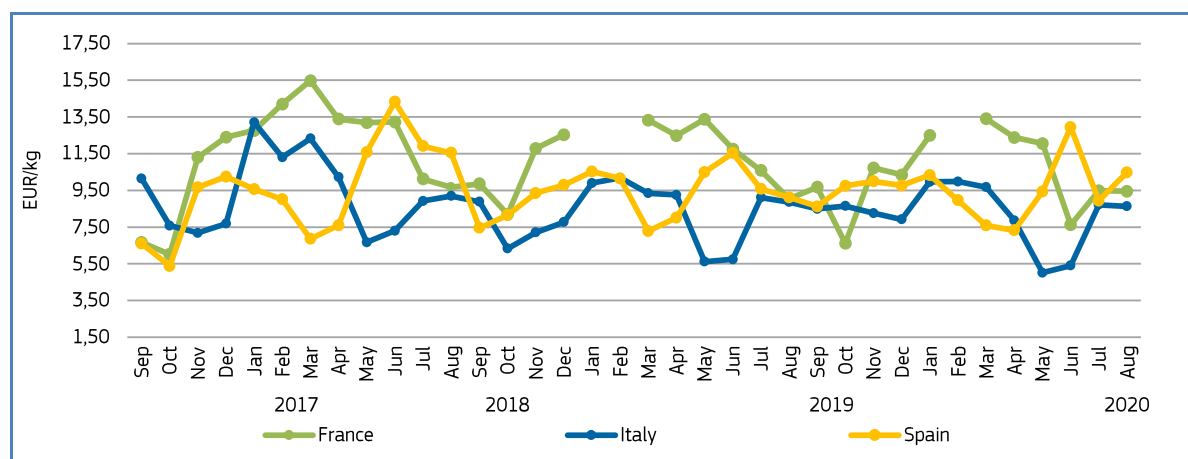
Figure 25. FIRST SALES: COMPOSITION OF TUNA AND TUNA-LIKE SPECIES (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, AUGUST 2020





Price trend

Figure 26. **ATLANTIC BLUEFIN TUNA: FIRST-SALES PRICES IN SELECTED COUNTRIES, SEPTEMBER 2017–AUGUST 2020**



Over the 36-month observation period (September 2017 to August 2020), the average first-sales price of bluefin tuna in **France** was 11,08 EUR/kg, 23% higher than in **Italy** (8,57 EUR/kg) and 15% higher than in **Spain** (9,44 EUR/kg).

In **France** in August 2020, the average first-sales price of Atlantic bluefin tuna (9,45 EUR/kg) increased by 4% from August 2019 and slightly decreased by 2% compared with August 2018. During the past 36 months, the average price ranged from 6,02 EUR/kg for 59 tonnes in October 2017, to 15,47 EUR/kg for 0,2 tonnes in March 2018.

In **Italy** in August 2020, the average first-sales price of Atlantic bluefin tuna (8,63 EUR/kg) decreased by 3% compared to August 2019, and by 6% from August 2018. During the observed period, the highest average price at 13,21 EUR/kg was seen in January 2018 when volume was roughly 2 tonnes, while the lowest average price was recorded in May 2020 at 5,01 EUR/kg for 250 tonnes.

In **Spain** in August 2020, the average first-sales price of Atlantic bluefin tuna (10,48 EUR/kg) increased by 15% compared to August 2019 and decreased by 9% from August 2018. During the observed period, the highest average price (14,33 EUR/kg for about 200 tonnes) was seen in June 2018, while the lowest average price was recorded in October 2017 at 5,38 EUR/kg, for 309 tonnes.

1.7. Focus on Atlantic bonito



Atlantic bonito (*Sarda sarda*) is a large pelagic fish of the family Scombridae. It is commonly found in shallow waters of the Atlantic Ocean, the Mediterranean Sea, and the Black Sea, where it is an important commercial and recreation fish. The species feeds mainly on mackerel, sand eels, sardines, anchovies, other schooling fish species, and squid. It occurs at depths of up to 200 metres, and in temperatures ranging from

12–27°C. Sexual maturity is reached at approximately 2 years of age, while spawning starts in the spring, occurring throughout May–June. Average size is 50cm fork length and about 2 kg in weight. The maximum reported age is 5 years¹⁷.

Atlantic bonito is mainly exploited by coastal artisanal fisheries. The species is particularly important in the Mediterranean and the Black Sea, where different methods are used to harvest this species: tuna fish traps, purse seines, gillnets, hooks and lines. This species is also a popular sport fish.

¹⁷ https://www.iccat.int/Documents/CVSP/CV069_2013/n_5/CV069052145.pdf



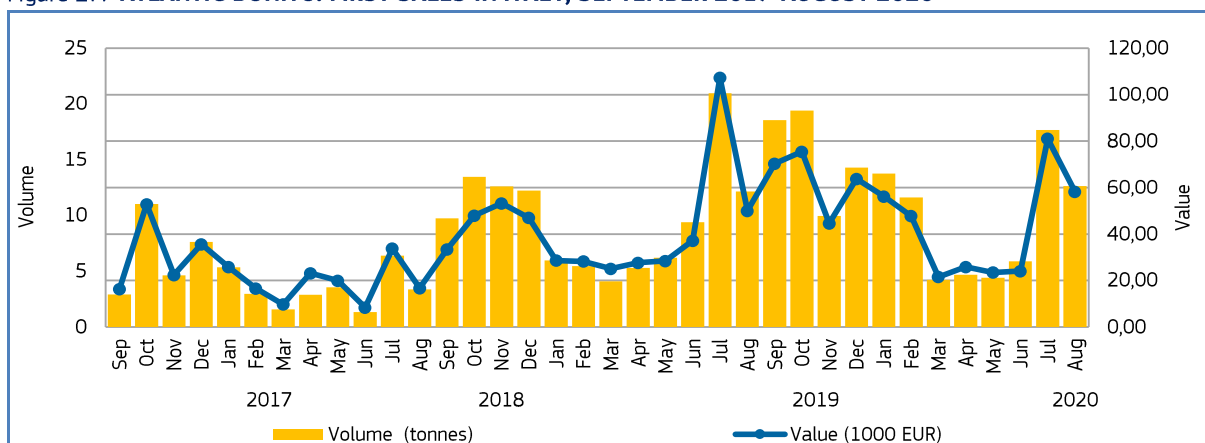
The International Commission for the Conservation of Atlantic Tunas (ICCAT) Standing Committee on Research and Statistics (SCRS) currently has no management advice for small species of tuna such as Atlantic bonito¹⁸.

Selected countries

Table 19. **COMPARISON OF ATLANTIC BONITO FIRST-SALES PRICES, MAIN PLACES OF SALES AND CONTRIBUTION TO OVERALL SALES OF TUNA AND TUNA-LIKE SPECIES FOR ITALY, PORTUGAL AND SPAIN.**

Atlantic bonito		First-sales change of Jan-Aug 2020 (%)		Contribution of Atlantic bonito to total tuna and tuna-like species first sales in August 2020 (%)	Principal places of sales in Jan-Aug 2020 in terms of first-sales value
		Compared to Jan-Aug 2019	Compared to Jan-Aug 2018		
Italy	Value	+2%	+119%+	2%	Genoa, Napoli, Civitavecchia.
	Volume	+8%	+172%	2%	
Portugal	Value	-57%	-35%	2%	Olhão, Sines, Peniche.
	Volume	-68%	-30%	1%	
Spain	Value	-15%	+8%	1%	La Azohía, Mazarrón, Chipiona.
	Volume	-26%	+12%	1%	

Figure 27. **ATLANTIC BONITO: FIRST SALES IN ITALY, SEPTEMBER 2017-AUGUST 2020**



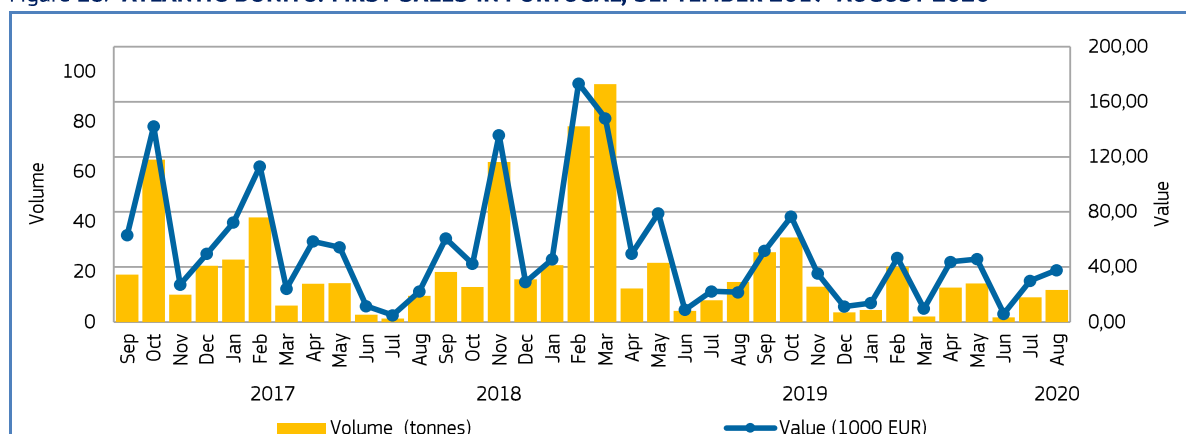
In **Italy**, first sales fluctuated over the past 36 months, with highest sales occurring in July 2020. The species is present all year round, but the best fishing period is when bonitos approach the Italian coast, during spring and summer. The minimum capture size permitted by law is 25 cm¹⁹.

¹⁸ <https://www.hi.no/en/hi/temasider/species/atlantic-bonito>

¹⁹ <http://www.abcomunicazioni.it/content/progetti/sicilianfishontheroad/en/il-pescato-siciliano/il-pesce-azzurro/palamita.html>



Figure 28. ATLANTIC BONITO: FIRST SALES IN PORTUGAL, SEPTEMBER 2017-AUGUST 2020



In **Portugal**, commercial fishing of Atlantic bonito fluctuates throughout the year, with the highest first sales typically occurring during autumn and winter, when the fishery is at its peak.

Figure 29. FIRST SALES: COMPARISON OF TUNA AND TUNA-LIKE SPECIES (ERS LEVEL) IN PORTUGAL IN VALUE AND VOLUME, AUGUST 2020

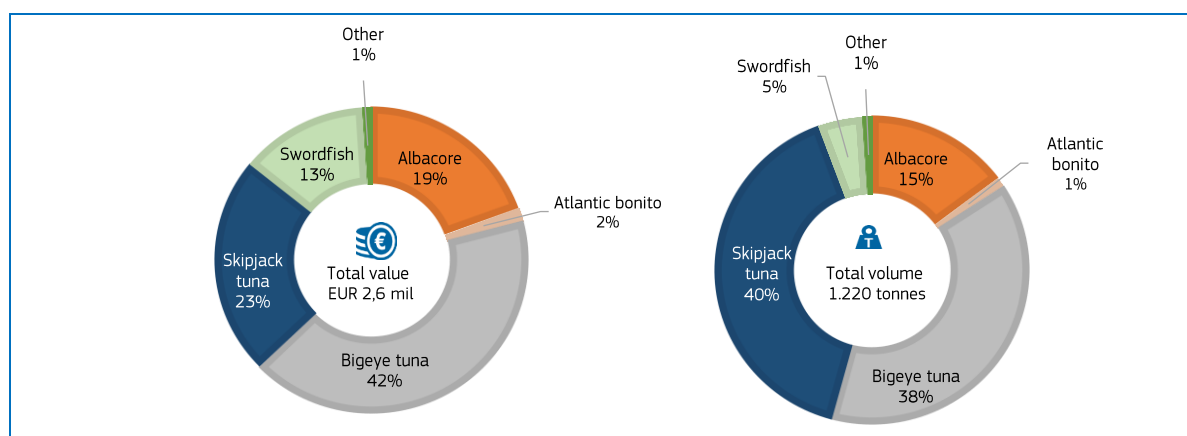
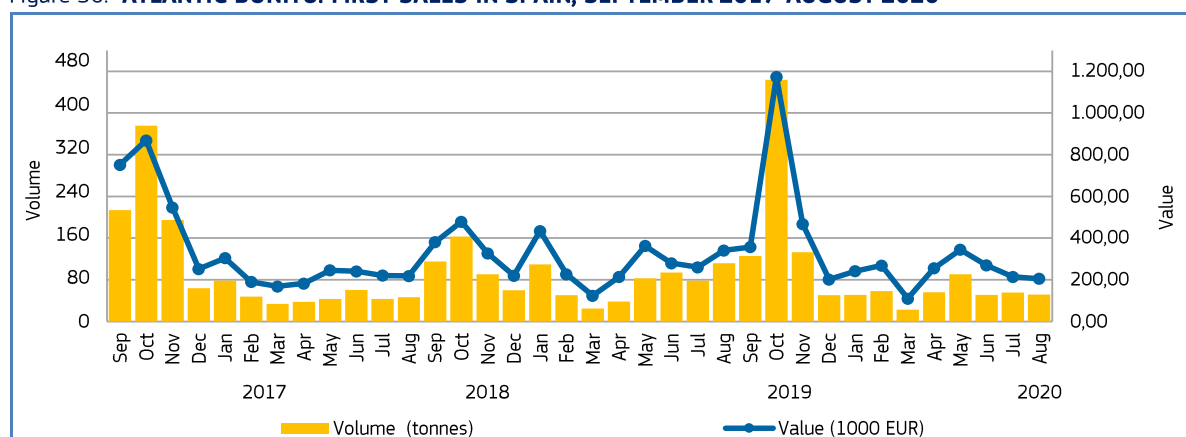


Figure 30. ATLANTIC BONITO: FIRST SALES IN SPAIN, SEPTEMBER 2017-AUGUST 2020

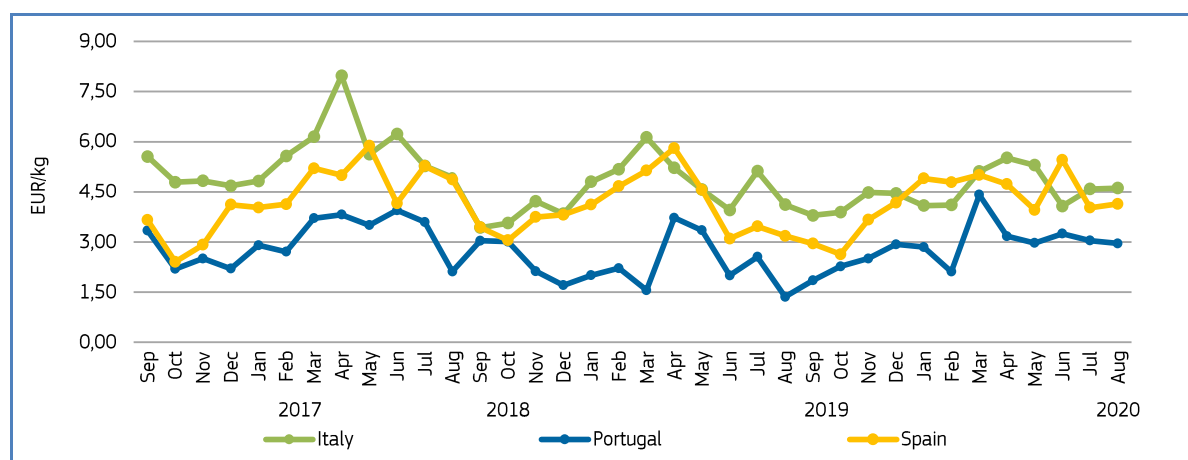


In **Spain**, September-November is the period during which the highest volume of Atlantic bonito is caught. Of the countries analysed, Spain reports the highest first-sales volume.



Price trend

Figure 31. **ATLANTIC BONITO: FIRST-SALES PRICE IN SELECTED COUNTRIES, SEPTEMBER 2017–AUGUST 2020**



Over the 36-month observation period (September 2017–August 2020), the average first-sales price of Atlantic bonito in **Italy** was 4,85 EUR/kg, 16% higher than in **Spain** (4,17 EUR/kg) and 76% more than in **Portugal** (2,76 EUR/kg).

In **Italy** in August 2020, the average first-sales price of Atlantic bonito (4,61 EUR/kg) increased by 12% relative to August 2019 and decreased by 7% relative to August 2018. Over the 36-month period, the average price varied from 3,43 EUR/kg for 10 tonnes in September 2018 to 7,97 EUR/kg for 3 tonnes in April 2018.

In **Portugal** in August 2020, the average first-sales price of Atlantic bonito (2,96 EUR/kg) increased by 118% over August 2019 and by 40% over August 2018. Over the observed period, the highest average price was recorded in March 2020 at 4,41 EUR/kg for 2 tonnes. The lowest average price was recorded in August 2019 at 1,36 EUR/kg for 16 tonnes.

In **Spain** in August 2020, the average first-sales price of Atlantic bonito was 4,14 EUR/kg, 30% higher than in August 2019, and 15% lower compared to the same month in 2018. The highest price in the past 36 months was registered in May 2018, at 5,88 EUR/kg for 42 tonnes. The lowest price (2,41 EUR/kg for 361 tonnes) was observed in October 2017.



2. Extra-EU imports

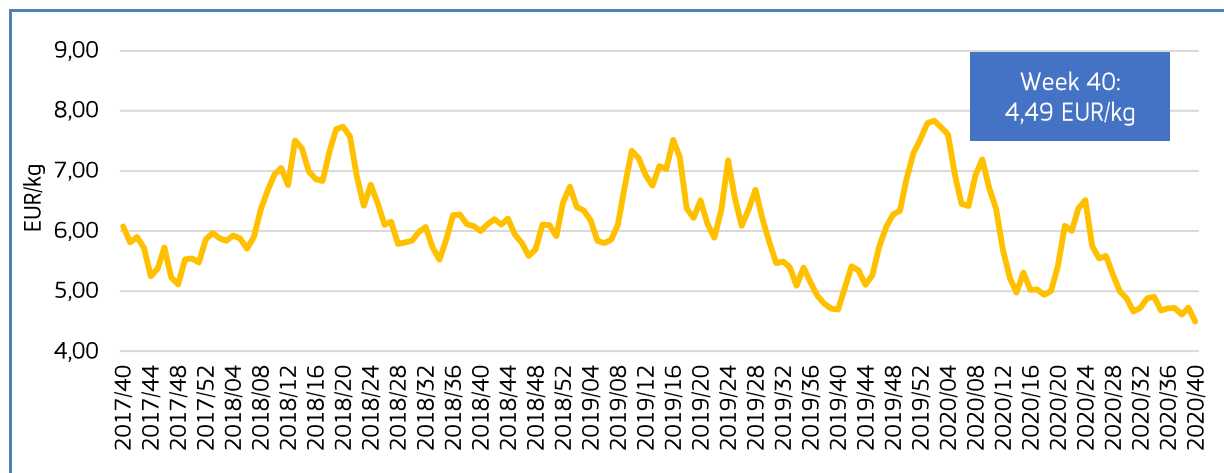
Every month, the weekly extra-EU import prices (average values per week, in EUR per kg) are examined for nine different species. The three most relevant species in terms of value and volume remain consistent, and are examined every month: fresh whole Atlantic salmon from Norway, frozen Alaska pollock fillets from China, and frozen tropical shrimp (*Penaeus* spp.) from Ecuador. The other six species change each month. Three are chosen from the commodity group of the month, which this month is tuna and tuna-like species. The featured commodity species this month are: frozen yellowfin tunas from the Philippines, prepared or preserved fillets known as 'loins' of skipjack from Ecuador, and frozen swordfish from China. The remaining three species examined each month are randomly selected and, this month, include frozen squid from China, oysters (other) from the Republic of Korea, and dried, salted cod from Norway.

Table 20. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THE THREE MOST RELEVANT FISHERIES AND AQUACULTURE PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 40/2020	Preceding 4-week average	Week 40/2019	Notes
Fresh whole Atlantic salmon imported from Norway (<i>Salmo salar</i> , CN code 03021400)	Price (EUR/kg)	4,49	4,69 (-4%)	4,70 (-4%)	Lower prices in September 2020 than the same month in previous years. Downward trend in 2017-2020. A combination of high harvest season in Norway in September/October and limitations in flexibility to export salmon to markets outside the EU have put extra pressure on EU market prices.
	Volume (tonnes)	17.600	17.210 (+2%)	14.920 (+18%)	Higher volumes in September than the same month in previous years. Stable trend in 2017-2020.
Frozen Alaska pollock fillets imported from China (<i>Theragra chalcogramma</i> , CN code 03047500)	Price (EUR/kg)	2,49	2,55 (-2%)	2,82 (-11%)	Upward trend in 2017-2020, but fall in price (under 3,00 EUR/kg) since week 26 of 2020.
	Volume (tonnes)	2.290	2.241 (+2%)	3.783 (-39%)	Fluctuations in supply; downward trend in 2017-2020.
Frozen tropical shrimp imported from Ecuador (genus <i>Penaeus</i> , CN code 03061792)	Price (EUR/kg)	4,20	4,47 (-6%)	5,81 (-28%)	Downward trend 2017-2020; fall in price (under 6,00 EUR/kg) since week 7 of 2020.
	Volume (tonnes)	2.436	3.190 (-24%)	2.623 (-7%)	Fluctuations in supply; upward trend in 2017-2020. Downward price trend must be seen in relation to Chinese import ban of shrimp from major Ecuadorian producers in July, in the wake of alleged discovery of traces of COVID-19 among shipments. Even though the ban has been lifted, reduced imports from China is putting pressure on prices on the EU market.

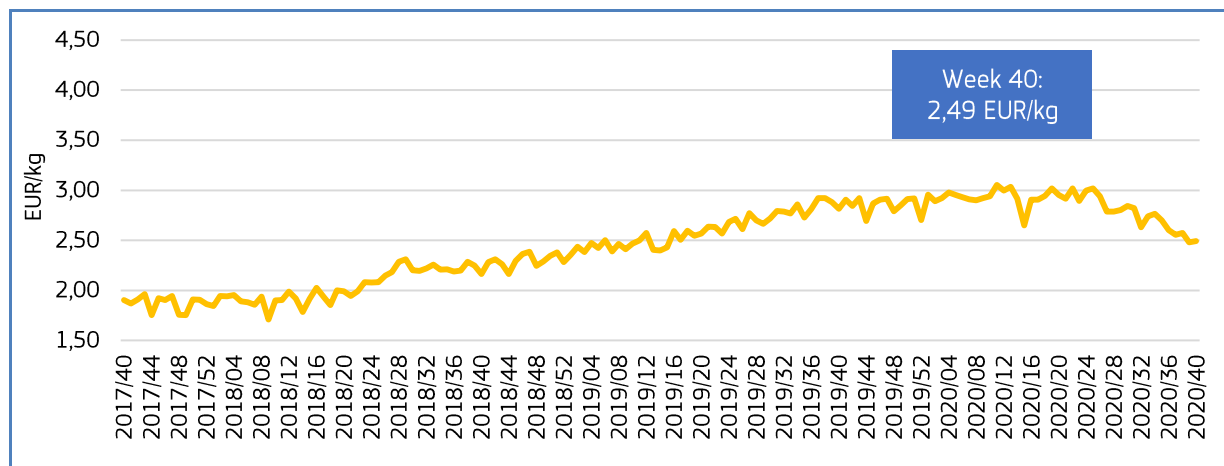
Source: European Commission (updated 15.10.2020).

Figure 32. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY**



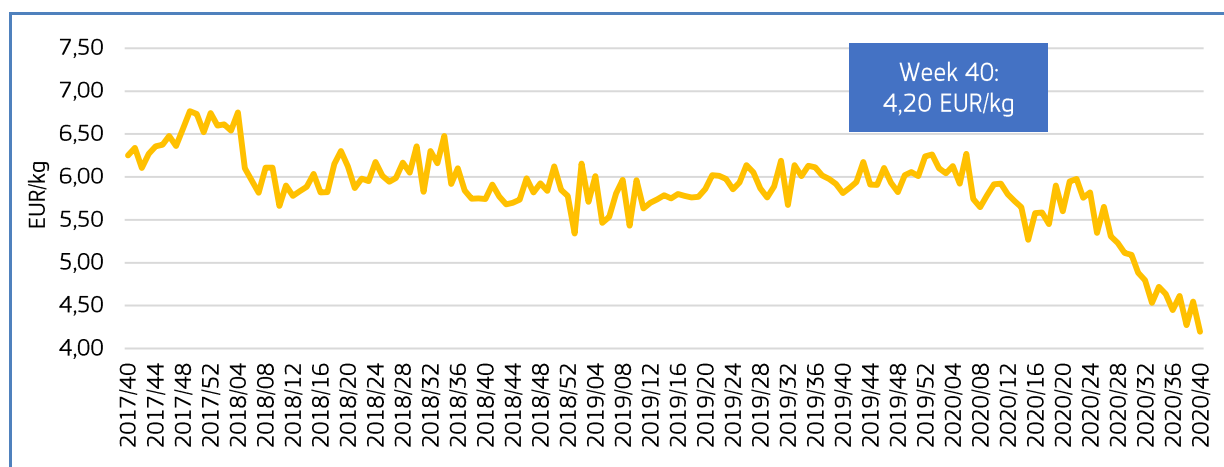
Source: European Commission (updated 15.10.2020).

Figure 33. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2017 – 2020**



Source: European Commission (updated 15.10.2020).

Figure 34. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR**



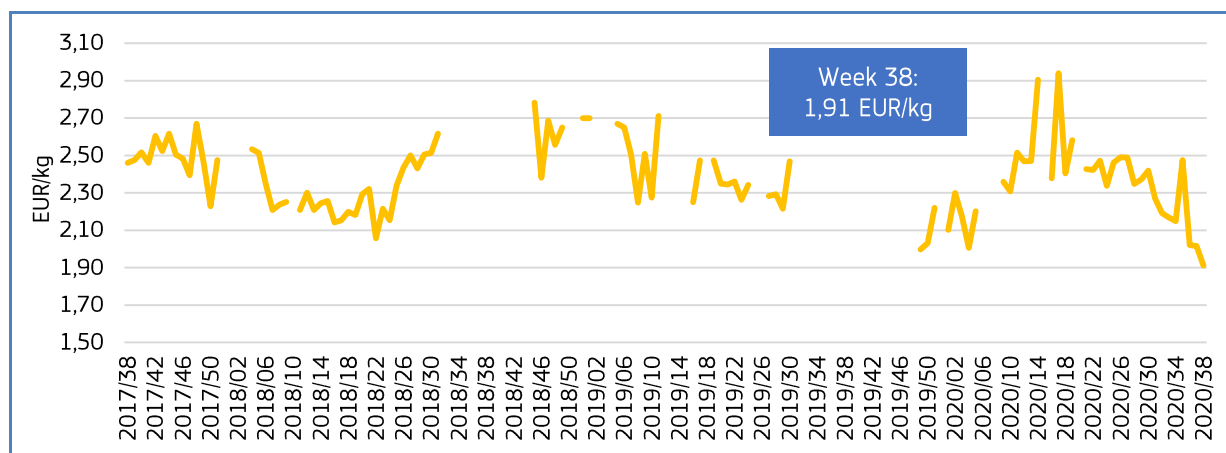
Source: European Commission (updated 15.10.2020).

Table 21. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

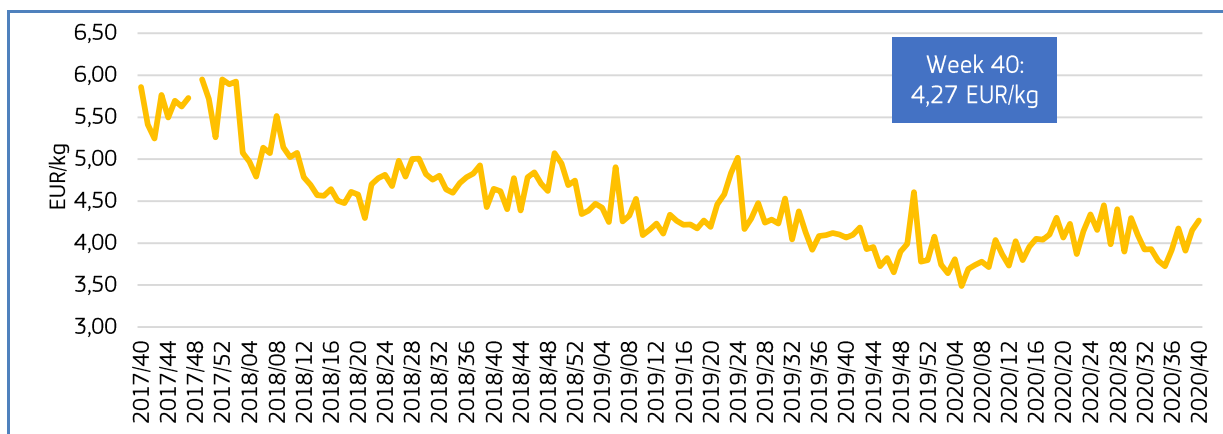
Extra-EU Imports		Week 40/2020	Preceding 4-week average	Week 40/2019	Notes
Frozen yellowfin tunas from Philippines (<i>Thunnus albacares</i> , CN code 03034220)	Price (EUR/kg)	*1,91	**2,17 (-12%)	***2,24 (-15%)	Downward trend in 2017-2020.
	Volume (tonnes)	*25	**415 (-94%)	***23 (+12%)	High fluctuations in supply; upward trend in 2017-2020.
Prepared or preserved fillets known as 'loins' of skipjack, from Ecuador (<i>Katsuwonus pelamis</i> , CN code 16041426)	Price (EUR/kg)	4,27	4,04 (+6%)	4,07 (+5%)	Downward trend in 2017-2020.
	Volume (tonnes)	417	441 (-5%)	430 (-3%)	Upward trend in 2017-2020.
Frozen swordfish from China (<i>Xiphias gladius</i> , CN code 03035700)	Price (EUR/kg)	4,82	4,64 (+4%)	5,92 (-19%)	Slight upward trend in 2017-2020.
	Volume (tonnes)	25	81 (-69%)	46 (-46%)	High fluctuations in supply; downward in trend 2017-2020.

Source: European Commission (updated 15.10.2020).

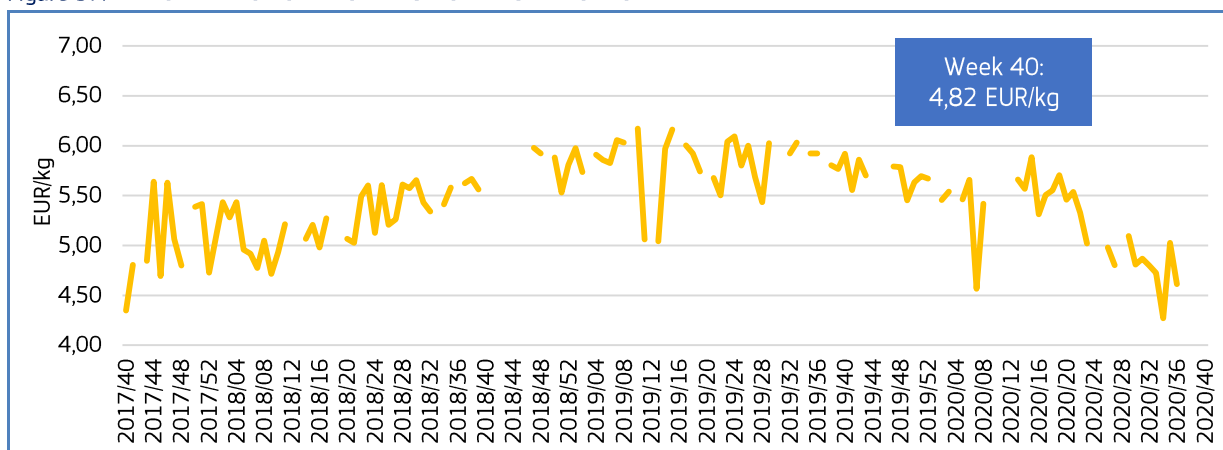
*Data refers to week 38 of 2020 (the most recent available); **week 34 to 37 of 2020; ***week 38 of 2019.

Figure 35. **IMPORT PRICE OF FROZEN YELLOWFIN TUNAS FROM PHILIPPINES**

Source: European Commission (updated 15.10.2020).

Figure 36. **IMPORT PRICE OF PREPARED OR PRESERVED SKIPJACK LOINS FROM ECUADOR**

Source: European Commission (updated 15.10.2020).

Figure 37. **IMPORT PRICE OF FROZEN SWORDFISH FROM CHINA**

Source: European Commission (updated 15.10.2020).

Since week 1 of 2020, the price of frozen yellowfin tunas (used for the industrial manufacture of products) imported from Philippines has declined, while volume has increased.

Prepared or preserved fillets - known as 'loins' - of skipjack from Ecuador showed a decreasing trend throughout 2020, while volume has increased. Most prices are in the range of 4,00-5,00 EUR/kg.

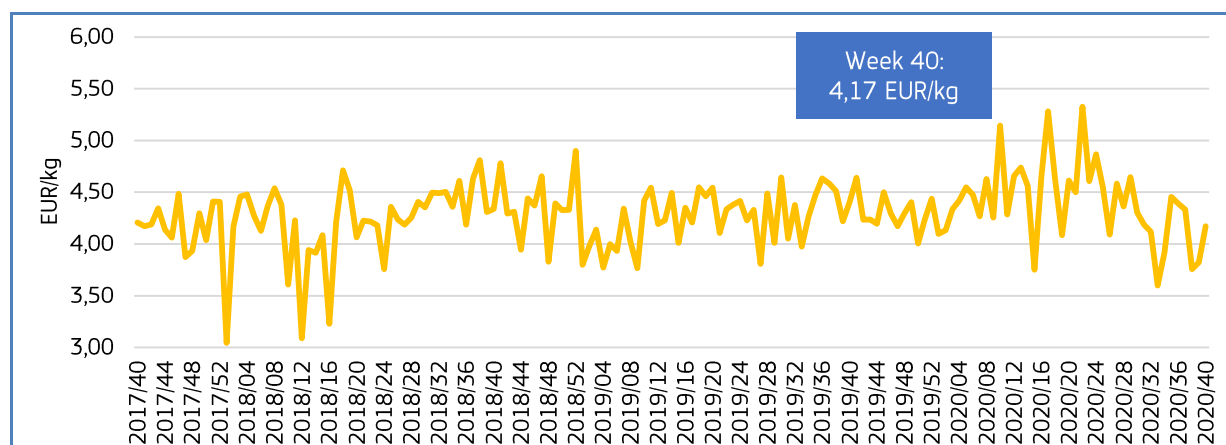
The price of frozen swordfish from China fluctuated from 4,27 to 6,17 EUR/kg. In 2020, price has followed a downward trend, whilst supply has increased.

Table 22. **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 40/2020	Preceding 4-week average	Week 40/2019	Notes
Frozen squid from China (<i>Illex</i> spp., CN code 03074392)	Price (EUR/kg)	4,17	4,08 (+2%)	4,41 (-5%)	Slight upward trend in 2017-2020.
	Volume (tonnes)	122	215 (-43%)	501 (-76%)	Downward trend in 2017-2020.
Oysters (other) from Republic of Korea (CN code 03071900)	Price (EUR/kg)	*40,77	**n/a	***n/a	Highly sporadic (data is available for 21 weeks for the past three years); weekly fluctuations.
	Volume (tonnes)	*0,001	**n/a	***n/a	Highly sporadic (data is available for 21 weeks for the past three years); high fluctuations in supply.
Dried, salted cod from Norway (<i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i> , CN code 03055190)	Price (EUR/kg)	*7,99	**8,27 (-3%)	***9,36 (-15%)	Slight upward trend in 2017-2020.
	Volume (tonnes)	*698	**457 (+53%)	***564 (+24%)	Downward trend in 2017-2020.

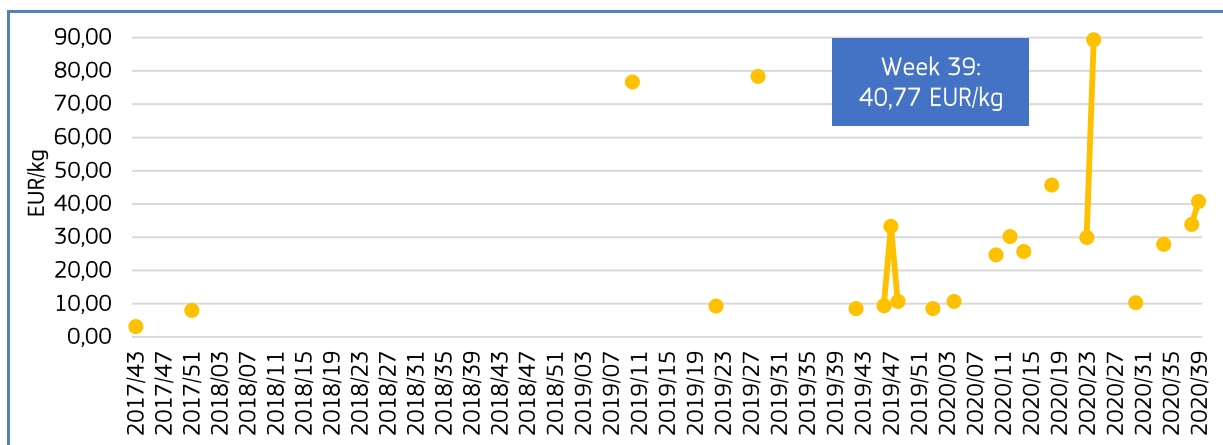
Source: European Commission (updated 15.10.2020).

*Data refers to week 39 of 2020 (the most recent available); **week 35 to 38 of 2020; ***week 39 of 2019.

Figure 38. **IMPORT PRICE OF FROZEN SQUID FROM CHINA**

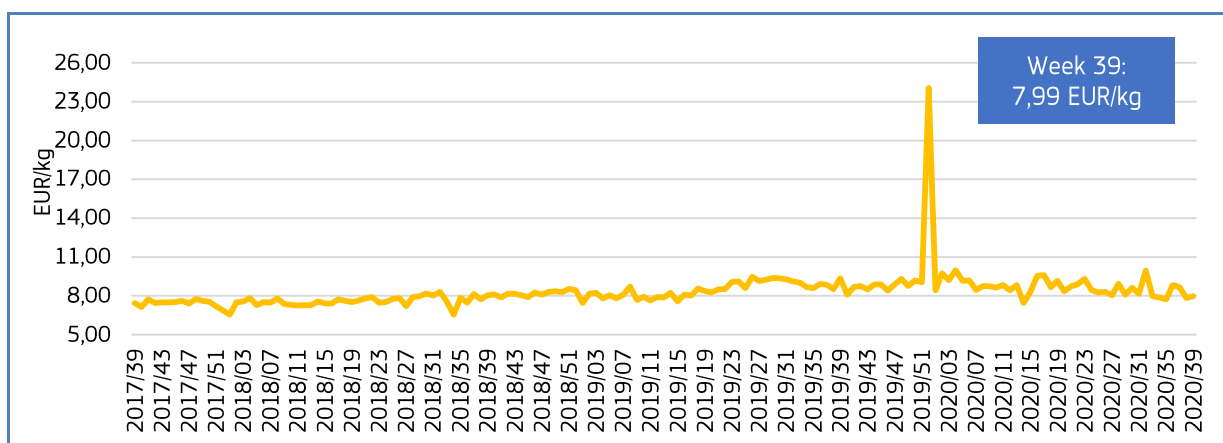
Source: European Commission (updated 15.10.2020).

Figure 39. **IMPORT PRICE OF OYSTERS (OTHER) FROM REPUBLIC OF KOREA**



Source: European Commission (updated 15.10.2020).

Figure 40. **IMPORT PRICE OF DRIED, SALTED COD FROM NORWAY**



Source: European Commission (updated 15.10.2020).

Since the beginning of 2020, the price of frozen squid from China has increased slightly, while volume has decreased at a faster rate.

Price and volume for oysters (other) imported from the Republic of Korea are scarce, and show high weekly fluctuations, from 3,00 to 89,00 EUR/kg and 0,001 to 6,5 tonnes, respectively. Price does not correlate with volume.

Most prices of dried, salted cod from Norway are in the range of 8,00 to 9,00 EUR/kg. The spike in price in week 52 of 2019 is due to a drop in supply. In 2020, supply increased.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In August 2020, household consumption of fresh fisheries and aquaculture products increased in both volume and value in Denmark, Hungary, Ireland, Spain, and Sweden, relative to August 2019. In the Netherlands, Poland, and Portugal, value increased but volume decreased. In the rest of the Member States analyzed, consumption decreased.

The drop seen in France was mainly due to reduced consumption of cod and trout (-30% and -35%, respectively).

Denmark registered an increase in consumption, due mainly to a rise in consumption of mackerel and flounder (+62% and +15%, respectively). Miscellaneous shrimp was the primary driver of increased consumption in Ireland (+28%).

Table 23. **AUGUST 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	August 2018		August 2019		July 2020		August 2020		Change from August 2019 to August 2020	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	27,0	941	14,42	996	16,04	1.102	18,62	1.137	18,51	14%	15%
France	33,7	16.418	171,07	16.569	179,76	16.891	194,22	15.067	168,66	9%	6%
Germany	13,4	3.646	54,43	4.447	68,24	5.303	81,20	4.307	67,63	3%	1%
Hungary	5,6	260	1,53	264	1,48	302	1,97	312	1,58	18%	7%
Ireland	23,0	982	14,68	939	14,29	1.022	15,19	998	14,60	6%	2%
Italy	30,9	21.130	239,83	24.069	239,48	23.537	242,78	23.371	234,99	3%	2%
Netherlands	21,1	2.826	38,81	3.244	41,83	3.400	48,16	3.043	45,18	6%	8%
Poland	15,0	2.817	17,41	2.770	18,91	3.174	21,82	2.678	19,08	3%	1%
Portugal	56,8	4.834	31,37	5.917	36,69	6.341	40,61	5.621	36,91	5%	1%
Spain	45,6	42.322	322,23	42.914	333,35	51.083	400,13	45.828	364,34	6%	8%
Sweden	26,6	775	11,93	986	14,55	778	10,06	1.211	15,76	23%	8%

Source: EUMOFA, based on Europanel (updated 15.10.2020).

*Data on per capita consumption of all fish and seafood products for all EU Member States can be found at: https://eumofa.eu/documents/20178/314856/EN_The+EU+fish+market_2019.pdf/

Over the past three years, average household consumption of fresh fisheries and aquaculture products in August has been above the annual average in terms of both volume and value in Portugal and Sweden. Annual average in volume was also above the average household consumption in Denmark, Germany, and the Netherlands. In the rest of the Member States analysed, value was below the annual average.

The most recent weekly consumption data (up to week 45 of 2020) are available on the EUMOFA website and can be accessed [here](#).

3.2. Fresh carp

Habitat: A freshwater fish living in warm, deep, slow-flowing, and still waters, such as rivers and lowland lakes²⁰.

Catch area: Rivers draining to the Black, Caspian, and Aral seas²¹.

Catching countries in the EU: Poland, the Czech Republic, Hungary²².

Production method: Mostly farmed, but also caught.

Main consumers in the EU: Poland, Hungary, the Czech Republic, Lithuania.

Presentation: Whole.

Preservation: Live, fresh.

Means of preparation: Cooked, baked and fried; also smoked.



3.2.1. Overview of household consumption in Germany and Poland

Germany and Poland are among the EU Member States with low per capita apparent consumption²³ of fisheries and aquaculture products. In 2017, the countries' per capita apparent consumption were 13,4 kg and 15,0 kg, -45% and -38%, respectively, below the EU average (24,3 kg). However, consumption in Poland increased slightly by 0,7% from 2016, while in Germany it decreased by 5%. Compared with Portugal, the Member State with the highest per capita apparent consumption (56,8 kg), Polish consumption was nearly four times lower. Compared with Germany, it was 12% higher.

See more on per capita apparent consumption in the EU in Table 23.

In Germany and Poland, carp consumption is seasonal, with highest peaks in December. Over the past three years, household consumption of fresh carp in Poland was more than three times higher than in Germany. Polish consumers spent 30% less for a kilogram of fresh carp (4,43 EUR/kg on average), than German consumers (6,29 EUR/kg on average).

We have covered **carp** in previous *Monthly Highlights*.

Consumption: Germany 4/2018, 12/2016; Latvia 8/2016, 6/2015, Lithuania 8/2016, 6/2015; Poland 4/2018, 12/2016, 8/2016, 6/2015.

Extra-EU Import: Myanmar 9/2019, 2/2019, 7/2018, 3/2018.

Topic of the month: Fresh carp in Central Europe 3/2016.

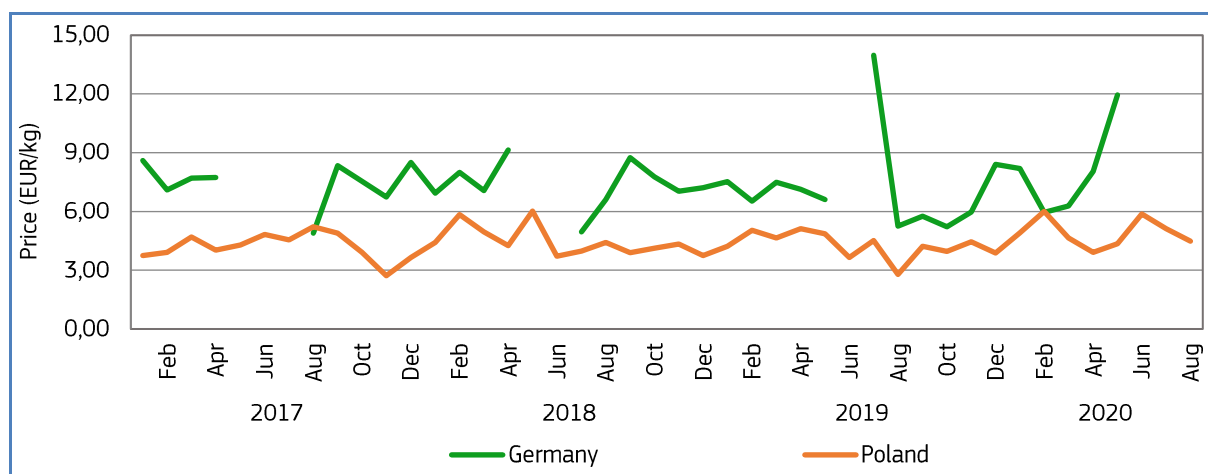
²⁰ <https://eumofa.eu/documents/20178/116138/MH+4+2018.pdf>

²¹ Ibid.

²² <https://www.eumofa.eu/documents/20178/257415/Price+structure+in+the+supply+chain+for+fresh+carp+in+Central+Europe.pdf>

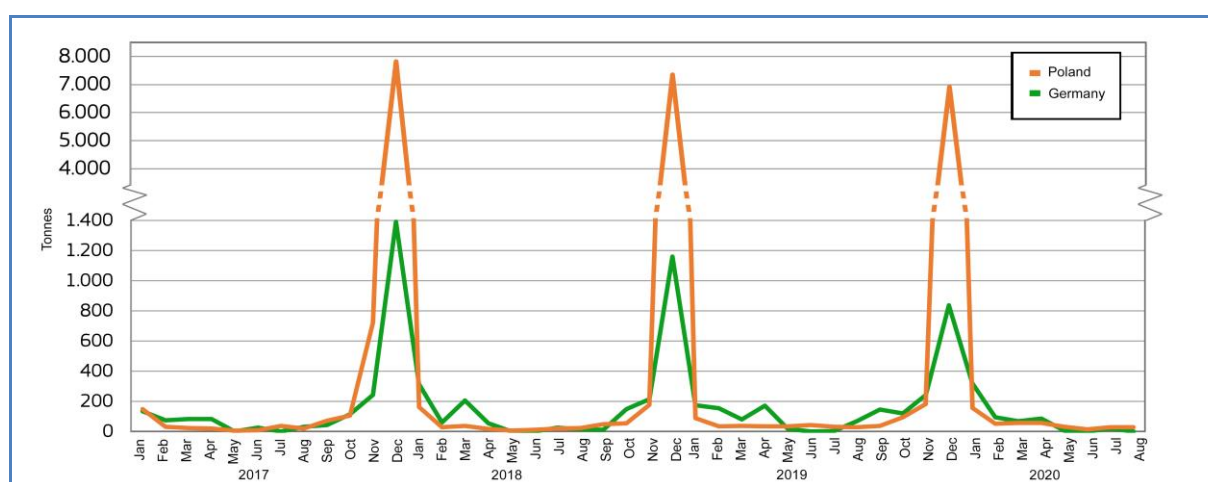
²³ "Apparent consumption" is calculated by using the supply balance sheet that provides an estimate of the supply of fisheries and aquaculture products available for human consumption at EU level. The calculation of the supply balance sheet is based on the equation: *Apparent consumption* = *[(total 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 41. **PRICES OF FRESH CARP PURCHASED BY GERMAN AND POLISH HOUSEHOLDS**



Source: EUMOFA, based on Europanel (updated 15.10.2020).

Figure 42. **HOUSEHOLD PURCHASES OF FRESH CARP IN GERMANY AND POLAND**



Source: EUMOFA based on Europanel (updated 15.10.2020).

3.2.2. Consumption trends in Germany

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

Yearly average price: 6,45 EUR/kg (2017), 6,12 EUR/kg (2018), 6,65 EUR/kg (2019).

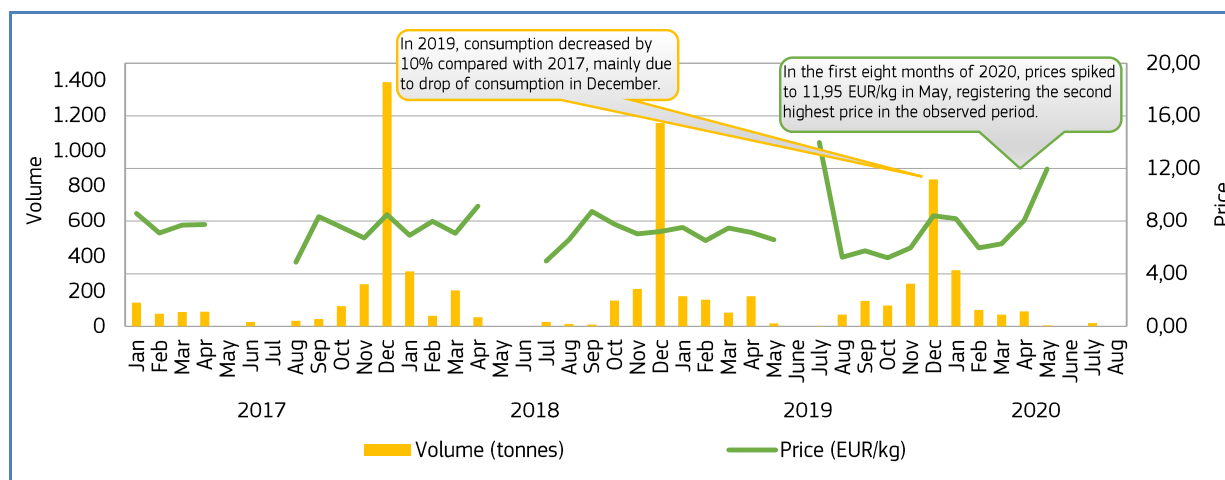
Yearly consumption: 2.220 tonnes (2017), 2.201 tonnes (2018), 2.009 tonnes (2019).

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

Average price: 5,75 EUR/kg.

Average consumption: 590 tonnes.

Figure 43. RETAIL PRICE AND VOLUME OF FRESH CARP PURCHASED BY HOUSEHOLDS IN GERMANY



Source: EUMOFA, based on Europanel (updated 15.10.2020).

3.2.3. Consumption trends in Poland

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

Yearly average price: 4,20 EUR/kg (2017), 4,47 EUR/kg (2018), 4,28 EUR/kg (2019).

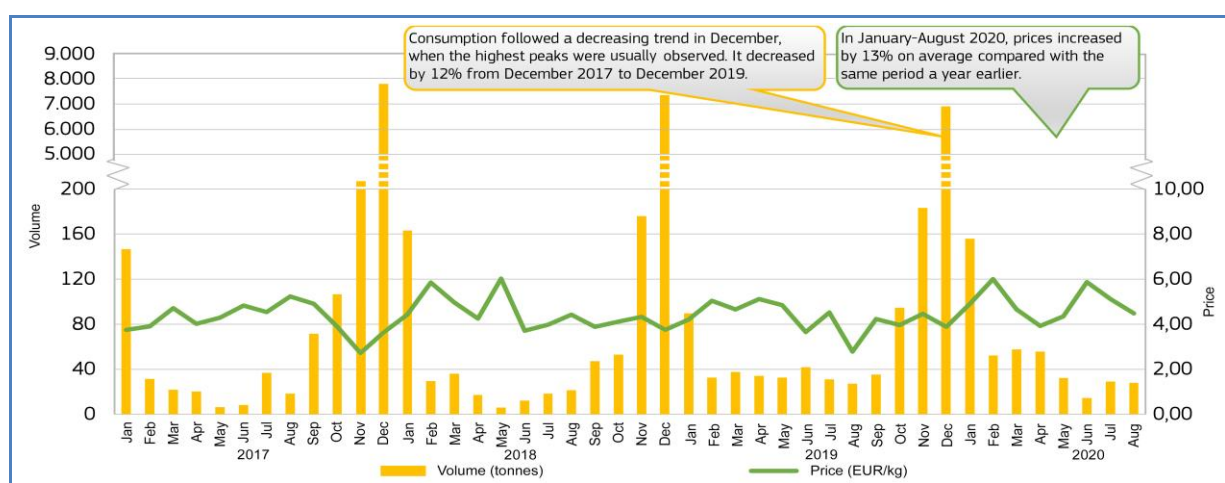
Yearly consumption: 9.006 tonnes (2017), 7.931 tonnes (2018), 7.550 tonnes (2019).

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

Average price: 4,91 EUR/kg.

Average consumption: 425 tonnes.

Figure 44. RETAIL PRICE AND VOLUME OF FRESH CARP PURCHASED BY HOUSEHOLDS IN POLAND

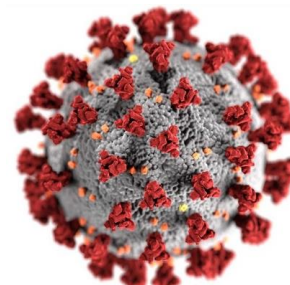


Source: EUMOFA, based on Europanel (updated 15.10.2020).

4. Case study – Effects of COVID-19

4.1 Introduction

COVID-19 is the name given to the infectious disease caused by the most recently discovered coronavirus (SARS-CoV-2), unknown before its outbreak in Wuhan, China, in December 2019²⁴. During the first months of 2020, the disease spread around the world and was classified as a pandemic by the World Health Organization (WHO) on 11th March. As of 17th November, 10,9 million people are reported to have been infected in Europe (55,2 million worldwide) and approximately 270 thousand have died (more than 1.3 million worldwide)²⁵.

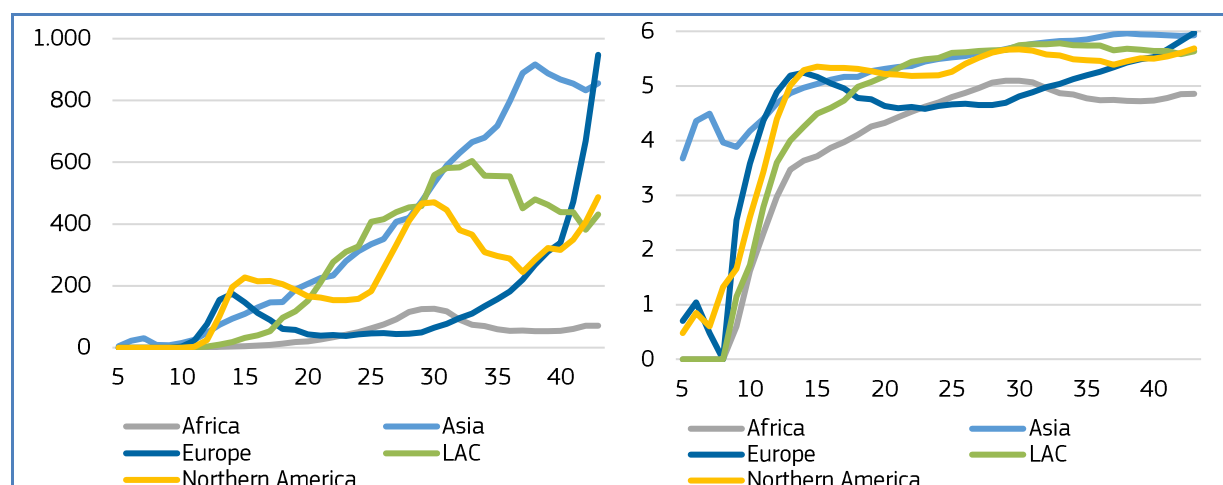


4.2. Development in COVID-19 cases

The number of weekly new cases of COVID-19 in Europe, Northern America (the USA, Canada and Greenland), Latin America and the Caribbean (LAC), and Asia (including China and Russia) is reported in Figure 45. The number of new cases rose in March and April in Europe and the USA, but fell as May drew near. In June, Northern America saw a rising number of new cases, while in Europe new cases remained low until mid-July, when new cases began increasing again. With the exception of Africa, the number of new cases is now increasing in all regions.

However, considering the rate of change (Figure 45, right), the curves for Africa, Asia, and LAC are flat, while the curves for Europe and Northern America have upward trends.

Figure 45. **WEEKLY NUMBER OF NEW CASES (in thousands, LEFT) AND NATURAL LOGARITHM OF WEEKLY NUMBER OF NEW CASES (RIGHT)**



Source: European Centre for Disease Prevention and Control.

²⁴ <https://www.who.int/emergencies/diseases/novel-coronavirus-2019>

²⁵ <https://www.ecdc.europa.eu/en/covid-19-pandemic>

4.3. Measures imposed by EU Member States to reduce the spread of COVID-19 since May 2020

From May until the beginning of July, the reduction in new cases of COVID-19 led European countries to gradually relax the preventive measures taken in the previous months²⁶. Lockdowns were eased, restaurants, cafes, bars, hotels, schools, and non-essential businesses were allowed to re-open, and travel to countries and regions with a low number of cases was permitted. Since September, however, several European countries began to re-impose restrictions on travel to countries and regions experiencing rising numbers of new cases. Hungary was the first country in the Schengen Area to close its borders to international travellers²⁷, followed by Spain (with exceptions for some countries)²⁸. While expanding their testing capacities, most countries have now re-introduced several measures to prevent the spread of COVID-19 again, such as limiting the group sizes in which people can meet, closing non-essential shops and businesses, and closing the HoReCa sector²⁹. Whilst most high schools and universities have switched to remote learning, primary schools and kindergartens have remained open³⁰. However, there has been some resistance to the reintroduction of lockdowns, with protests occurring in many countries, including Italy and Spain³¹.

It is worth noting that, to ensure the availability of goods and essential services, the European Commission issued border management guidelines as early as 16th March, setting out “principles for an integrated approach to an effective border management to protect health while preserving the integrity of the Single Market”³². These guidelines included the principle that MS should preserve the free circulation of all goods, and in particular they should guarantee the supply chain for essential products such as medicines, medical equipment, essential and perishable food products, and livestock. The guidelines also included principles regarding priority lanes for emergency and freight transport (e.g. via “green lanes”), as well as guidance on health-check rules for entry of both EU and non-EU nationals at both external and internal borders.

4.4. Impact of COVID-19 on the seafood supply chain

The **COVID-19 case study published in MH-5 featured** a summary of the impacts that the first few months of the pandemic had on the seafood supply chain. In short, impacts on first sales of small pelagics from fisheries in Northern Europe were found to be negligible. Groundfish and flatfish fisheries were impacted differently, depending on species and market segments, with species primarily sold to the HoReCa sector experiencing a sharp fall in price. EMODnet³³ data also revealed a sharp decline in fishing vessel activity in April across EU waters. As for the EU fleet fishing in external regions (Africa and the Indian Ocean), fishing operations were in some cases delayed due to infections among crew members. Travel restrictions also meant that crew changeovers were challenging.

In the aquaculture sector, sales dropped significantly for most species, as the primary market for aquaculture products is the HoReCa sector. Some exceptions were found for species processed and sold to large-scale retailers (salmon, trout, and –to a lesser extent – cod, seabass and seabream).

As the fishing and aquaculture sector has been particularly hard hit by the market disruption, in March the European Commission proposed measures for an immediate response to the economic and social consequences of the COVID-19 crisis. These measures consisted of: a) possible support under existing rules, in particular under the European Maritime and Fisheries Fund (EMFF) regulation; b) a new, temporary framework for state aid that allows Member States to support fisheries and aquaculture producers who impacted by the crisis through the provision of aid (up to a value of EUR 120.000 per undertaking) through direct grants, repayable advances or tax advantages³⁴; c) EU support to the European economy as a whole, under the COVID-19 response investment initiative, and using the general instruments for an immediate response – including providing liquidity to SMEs, as well as compensation via the EMFF for the economic losses experienced by fishermen and aquaculture producers.

²⁶ <https://www.dw.com/en/coronavirus-latest-europe-opens-up-for-tourism/a-53646330>

²⁷ <https://www.schengenvisainfo.com/news/timeline-of-eu-member-states-reopening-their-borders/>

²⁸ <https://www.schengenvisainfo.com/news/spain-extends-schengen-border-closure-until-october-31/>

²⁹ <https://www.euronews.com/2020/11/11/europe-s-second-wave-of-coronavirus-here-s-what-s-happening-across-the-continent>

³⁰ Ibid.

³¹ Ibid.

³² https://ec.europa.eu/home-affairs/sites/homeaffairs/files/what-we-do/policies/european-agenda-migration/20200316_covid-19-guidelines-for-border-management.pdf

³³ www.EMODNET-humanactivities.eu

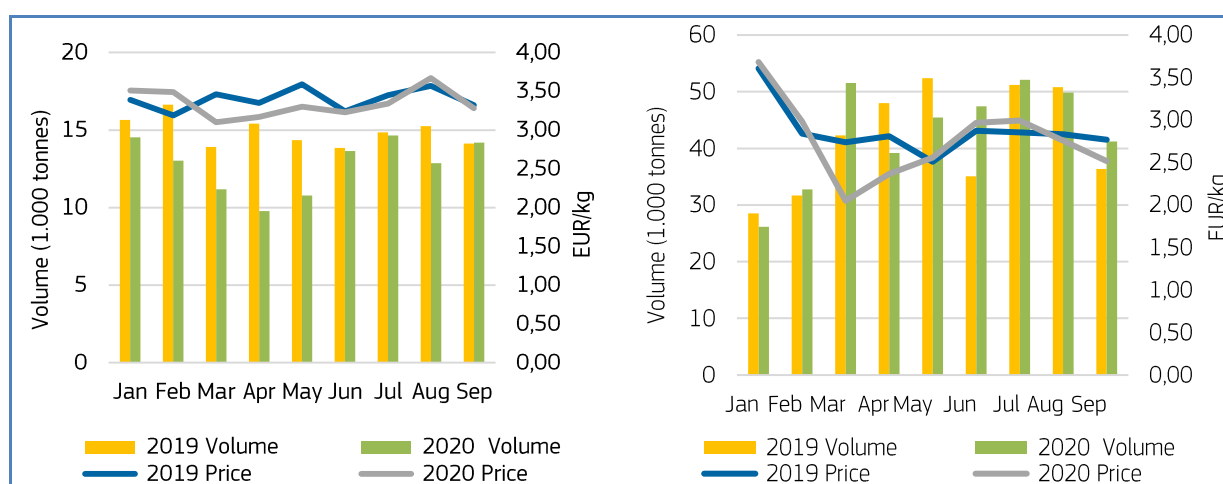
³⁴ https://ec.europa.eu/fisheries/press/coronavirus-european-commission-helps-member-states-support-local-fishing-and-aquaculture_en

The overall situation for the EU fishery and aquaculture sector improved as lockdown restrictions were lifted, travel between MS (and with other European countries) was allowed again, and new cases of COVID-19, as well as the infection pressure, fell in the June to August period.

First sales

Overall, lockdown led to a sharp fall in demand and reduced first-sales prices across Europe, although with significant fluctuations and varying trends between countries and species. In most European countries, first-sales volumes and prices gradually increased as countries re-opened after lockdown. In France, average prices for first sales rose by 18% between March and August, while in Spain prices rose by 34%. For both countries, first-sales volumes reported during the June to September period were in line with those observed in 2019.

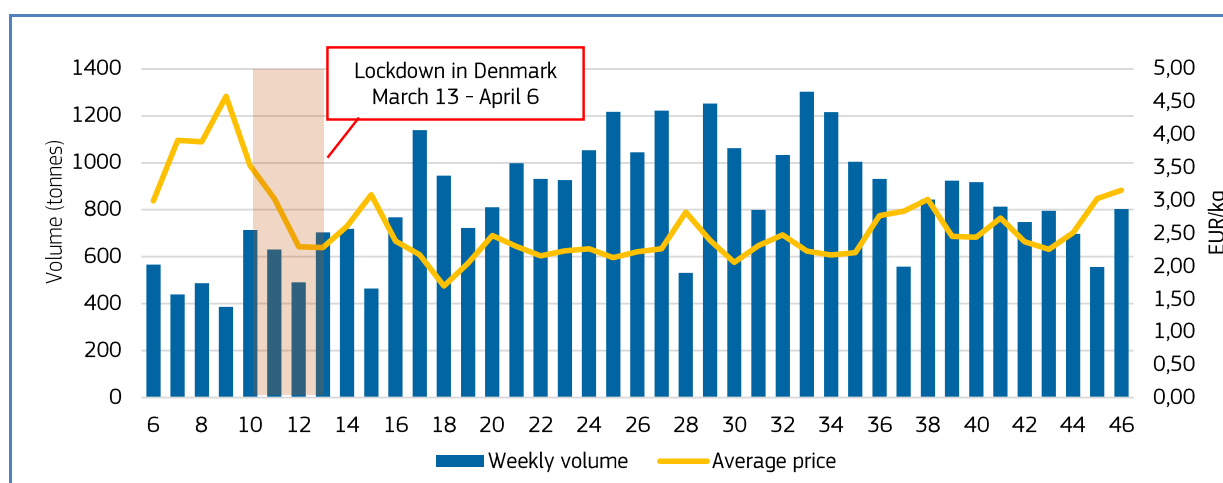
Figure 46. **FIRST-SALES VOLUME AND AVERAGE PRICE IN FRANCE (LEFT) AND SPAIN (RIGHT) – JANUARY–SEPTEMBER 2020**



Source: EUMOFA.

At five auctions (Hanstholm, Nord Hirtshals, Nord Strandby, Skagen and Grenaa) in Denmark, first-sales prices increased from the all-year low in week 18 (1,70 EUR/kg) to 3,15 EUR/kg in week 46.

Figure 47. **FIRST-SALES VOLUME AND AVERAGE PRICE AT FIVE DANISH AUCTIONS – WEEKS 6–46 2020**



Source: Fiskeauktion.dk

Despite fishers at the beginning of the second COVID-19 wave benefitting from the innovative establishment of new sales channels that took place under the first lockdown period (such as online direct purchasing solutions and local seafood

purchasing initiatives from retailers), the closure of the HoReCa sector impacted demand and, consequently, landing prices. For the species monkfish and sole (typically demanded by restaurants), first-sales prices have dropped significantly during the second COVID-19 wave³⁵. First-sales prices for flat oyster have halved during the same period, leading to reduced fishing activity.

Aquaculture

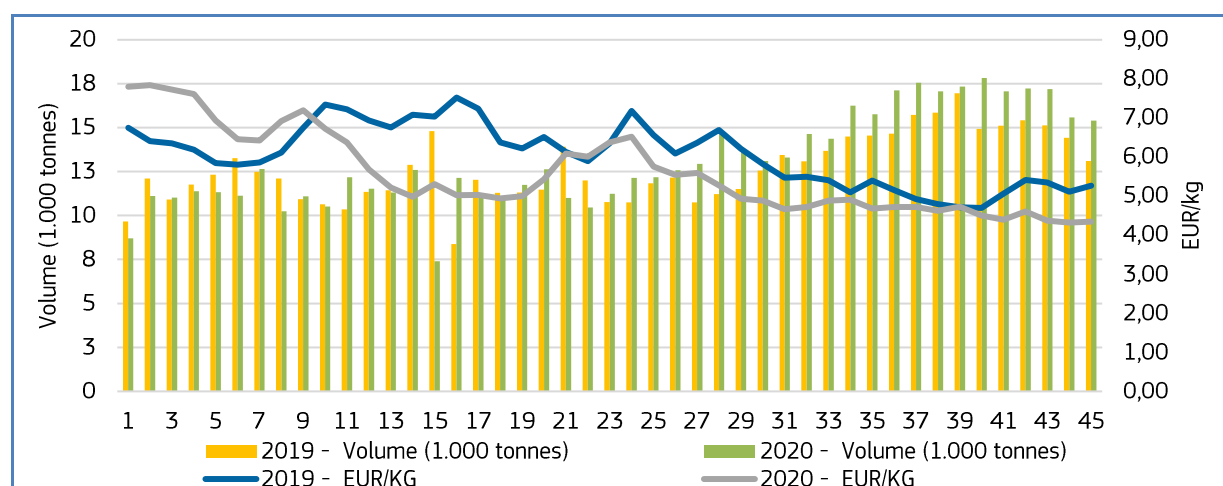
The primary market for farmed species in Europe is the HoReCa sector. Whilst the pandemic had a severe impact on volumes sold in March and April, the situation improved somewhat during the summer. However, the market for some species has still not fully recovered.

Among these species, it is worth mentioning mussels and oysters farmed in Ireland, whose producers were significantly affected in the first half of 2020, due to both difficulties accessing markets and a fall in prices. Although these issues gradually subsided after the first wave of the pandemic passed, lost sales and production caused a significant financial burden. Mussel producers suffered a 34% drop in sales between February and June, whilst oyster producers recorded a 59% loss during the same time period. On 22nd October, the Irish Minister of Agriculture, Food, and the Marine introduced a financial support package for these sectors, within the framework of the European Maritime and Fisheries Fund. The second COVID-19 wave has once again reduced demand for Irish crustaceans, putting farmers in a difficult situation.

The main species farmed in the Mediterranean – seabass and seabream – were also impacted by the COVID-19 pandemic, compounded by Storm Gloria which hit Spain in January, prior to the pandemic. This had a dual effect. On one hand, Spanish farmers suffered losses from damaged fish farms, and as a result, Spanish market prices of farmed seabass and seabream increased amid lockdown, remaining high till September. On the other hand, for farmers in Greece, the restrictions introduced in October (restaurants closed for dining, and Italy – their main market – in a second lockdown) led to a fall in demand – especially for large sized fish. Consequently, the shortage of supply of domestically farmed seabass and seabream in Spain led to a notable increase in exports of seabass and seabream from Greece to Spain.

For Atlantic salmon, the situation so far in 2020 has been varied. On one hand, despite a few COVID-19 infections among those working in processing, the supply chains for European salmon have remained effective. On the other hand, the HoReCa sector has been disrupted by travel restrictions and lockdowns. Loss of market opportunities outside of the EU, due to high freight cost for fresh salmon products, significant reduction in air freight capacity, and lockdown in some major markets, have all represented a significant challenge which has led to a higher share of salmon farmed in Europe ending up in the European market. This put extra pressure on market prices. Another factor contributing to low salmon prices in the EU is the increased competition with the Atlantic salmon farmed in Chile, as frozen Chilean salmon is sold to the EU market at prices significantly lower than fresh European salmon. So far in 2020, EU imports of frozen Chilean salmon have more than doubled, as a result of the Chilean industry's attempt to find relief market for salmon.

Figure 48. **WEEKLY EU IMPORTS OF FRESH ATLANTIC SALMON FROM NORWAY – WEEKS 1–45 2020**



Source: European Commission – DG TAXUD.

³⁵ EUMOFA database.

Despite volatile market conditions, organic certified aquaculture products have, in general, faced the pandemic well. Reportedly, pressure on prices for conventional farmed seabass/seabream and salmon have, to some extent, affected prices for organic products, but consumers with a preference for sustainable certified products seem to have a high degree of loyalty to organic farmed fish despite the higher price.

General input from industry stakeholders points to reduced margins in marine finfish farming during the second COVID-19 wave. Protective measures for workers in farming and harvesting/packing operations have driven costs up, while simultaneously a fall in demand has driven prices down.

Processing

During the initial phase of the first COVID-19 wave, a large share of the EU processing industry was severely impacted, due to tightened border controls causing delays in transport of goods for processing industries and retail markets. Local crisis measures (such as quarantine of foreign vessels before they are allowed into port) in remote producing countries has, in some instances, led to a shortage of raw material, which in turn has lowered the rate of production in some processing plants³⁶. Even though effective solutions were quickly established at MS borders, the rapid shift in demand from foodservice to retail remained a challenge for parts of the processing industry.

Going into the second lockdown in the autumn of 2020, the processing industry seems to be better prepared, with measures for avoiding staff infections including personal protection equipment, social distancing, hygiene rules and intensive COVID-19 testing regimes. For example, despite the higher demand for canned tuna, most of the canneries in Peru ran at low capacity due to the implementation of social distancing measures³⁷. Still, the status varies, depending on product and customers. In general, processors targeting or under contract of large-scale retailers seem to be in a stable position. The same applies to a large extent for processors of pelagic species – both for human consumption and for fishmeal and fish oil. However, there are exceptions, depending on geography, preservation states, and species. For example, the Norwegian corporation Leroy Seafood Group reported a challenging third quarter for its “wild catch” division. The loss in earnings before interest and taxes (EBIT) of EUR 4,7 million was caused by lower catches, a drop in market prices for cod and saithe by 22% from Q1, and a drop in haddock prices of 42% from Q1. The company states that conditions continue to be challenging for the processing industry, with no signs of improvement.

A major concern among processors is the timing of the lockdown. For many fish species, the sales season in advance of the Christmas holidays/break is the most important. With lockdown measures scheduled to be lifted in early December at the earliest, there might be reason for concern – especially for sales to the HoReCa sector³⁸.

Wholesale and consumption

During the first wave of COVID-19 in the spring of 2020, many restaurants adapted to offer take-out services. Having this facility already in place may lessen the effect of the second COVID-19 wave on the restaurant sector³⁹. However, as the economy is weakened and unemployment is rising, household income has fallen, and demand for high-value products such as lobster has reduced⁴⁰. Simultaneously, sales of canned tuna, sardines, and mackerel have increased⁴¹.

High-value products like fresh bluefin tuna saw a sharp decrease in wholesale volume and prices at the MercaMadrid wholesale market in the period following the first lockdown, with wholesale volumes and prices far below the levels recorded in the same period of 2019. In May and June, wholesale volumes increased gradually to the same level as in 2019. Despite a slight increase, prices averaged at well below last year's level. However, as from September and up to week 45, both weekly wholesale volumes and prices were higher than in 2019.

³⁶ <https://devpolicy.org/covid-19-and-its-likely-impact-on-the-tuna-industry-in-the-pacific-islands-20200427-1/>

³⁷ <http://www.fao.org/in-action/globefish/market-reports/resource-detail/fr/c/1263856/>

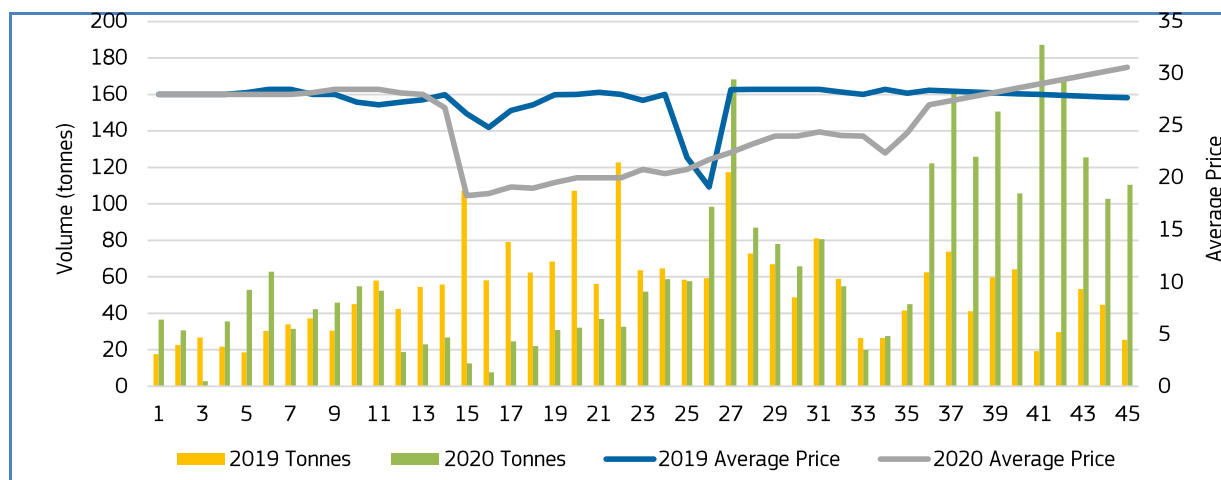
³⁸ <https://www.intrafish.com/markets/kontali-salmon-farmers-should-prepare-for-a-blue-christmas/2-1-907330>

³⁹ <https://www.intrafish.com/markets/seafood-restaurant-giant-red-lobster-opens-its-first-ghost-kitchen/2-1-910923>

⁴⁰ <http://www.fao.org/in-action/globefish/covid-19/en/>

⁴¹ Ibid.

Figure 49. **WEEKLY VOLUME AND AVERAGE PRICE OF FRESH BLUEFIN TUNA AT MERCAMADRID, SPAIN – WEEKS 1–45 2020**

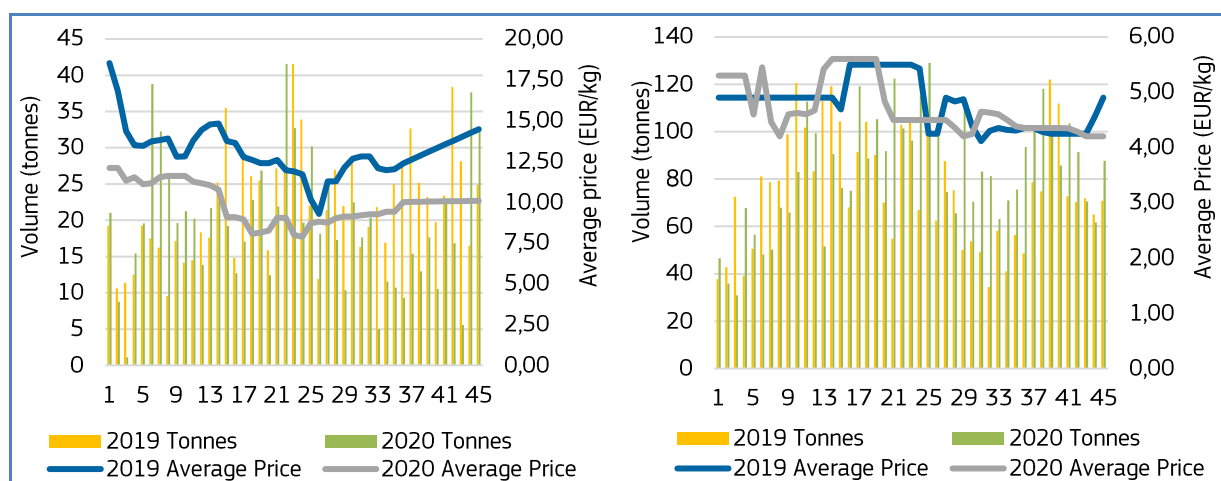


Source: MERCAMADRID.

Farmed turbot also experienced a steep fall in wholesale prices and volume in the weeks following lockdown. Similar to other high-priced seafood products, market prices gradually increased during the summer, but prices were significantly lower than in 2019. From July to September, volumes sold trended lower than those observed in 2019.

Prices for seabream and seabass increased on the MercaMadrid market in the weeks following lockdown (see section on aquaculture), due to low domestic supply volumes. During weeks 1-45, both wholesales volumes and prices were in line with 2019 levels.

Figure 50. **WEEKLY VOLUME AND AVERAGE PRICE OF FRESH TURBOT (LEFT) AND SEABREAM 300-400 G (RIGHT) AT MERCAMADRID, SPAIN – WEEKS 1–45 2020**



Source: MERCAMADRID.

German expenditure on fisheries and aquaculture products rose by 16,5% in the first half of 2020, reaching EUR 2.4 billion, a record high. In the same period, volumes rose to 236.665 tonnes, representing a 14,8% increase compared to the same period in 2019. Alaska pollock, salmon, tuna, herring, and shrimp were the most purchased species ⁴².

Consumption of seafood products in Spanish households increased by 10% in volume and 15% in value during the first six months of 2020, compared to the same period in the previous year⁴³. Also observed was a 15% increase in per capita

⁴² Fisch-Informationszentrum (FIZ).

⁴³ <https://industriaspesqueras.com/noticia-63340-seccion-Mercados%20y%20Consumo>

consumption of seafood compared to last year, and sales of frozen fish increased by 24% in volume and 28% in value⁴⁴. The largest increase in expenditure and consumption per capita occurred during April and May, the period in which lockdown entailed house confinement.

Consumption of smoked salmon in France under the first lockdown rose by 14% in value compared with the same period in 2019. The increase in demand has been further confirmed by a 10% increase in consumption in the May - October period⁴⁵. This supports the general observation of increasing in-home consumption and decreasing out-of-home consumption during the pandemic⁴⁶.

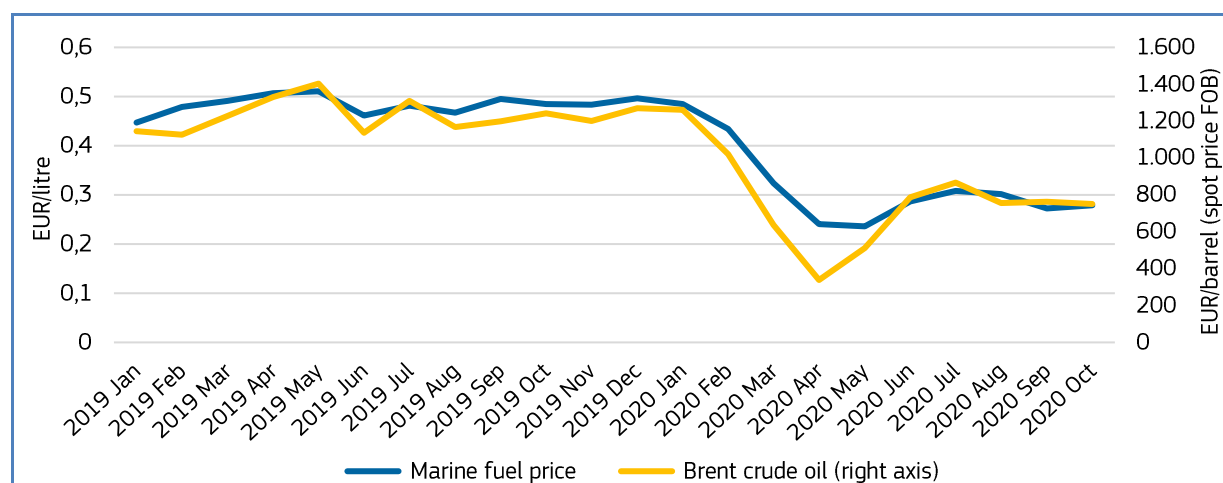
In Ireland, large retailers have increased sales during the pandemic. Typical bulk products (for example mackerel fillets) recorded a higher demand, and sales volumes were 1.5 times higher in the period following the lockdown compared to the pre-lockdown level. During the first wave of COVID-19, there was a sharp increase in sales of frozen fish⁴⁷, especially whitefish species such as prepared Alaska pollock, haddock, and pangasius⁴⁸.

Transportation and logistics

The COVID-19 pandemic has disrupted passenger services and the bellyhold capacity on passenger aircrafts. As restrictions on international travel led to the cancellation of many passenger flights, cargo was reduced, which was feared to put supply chains for seafood products (and other food products) at risk⁴⁹. For example, Japan, the largest non-canned tuna market in the world, received almost no supply of air-flown fresh tuna during the spring festival season, as scheduled flights from the supply-side to Japanese markets were cancelled⁵⁰. Conversely, cargo has now become the main source of revenue for many airlines, in addition to helping passenger flights get back in the air. Although the capacity crunch is still present, load factors and yields are going down and becoming closer to pre-COVID-19 levels, despite still being higher than normal⁵¹.

Marine fuel prices experienced a sharp decline from February to April. Although the prices have not returned to pre-COVID-19 levels, (October prices for 2020 are 43% lower than in the same period of 2019), they have stabilised. The decrease in both jet fuel and marine fuel prices was caused by declining oil prices.

Figure 51. **AVERAGE EU MARINE FUEL PRICES AND BRENT CRUDE OIL PRICES (spot price FOB) PER MONTH**



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

⁴⁴ <https://industriaspesqueras.com/noticia-63340-seccion-Mercados%20y%20Consumo>

⁴⁵ <http://pdm-seafoodmag.com/lactualite/detail/items/saumon-fume-des-fetes-de-fin-dannee-dans-la-continuite-du-succes-2020.html>

⁴⁶ <https://www2.deloitte.com/content/dam/Deloitte/de/Documents/consumer-business/Impact%20of%20the%20COVID-19%20crisis%20on%20consumer%20behavior.pdf>

⁴⁷ <https://www.intrafish.com/markets/youngs-seafood-birds-eye-buoyed-as-retail-frozen-fish-sales-outpace-chilled-for-first-time-in-over-a-decade/2-1-817566>

⁴⁸ Ibid.

⁴⁹ <https://www.aircargonews.net/business/supply-chains/emirates-skycargo-maintains-perishables-supply-chain/>

⁵⁰ <https://www.undercurrentnews.com/2020/08/06/covid-19-ends-positive-trends-for-fresh-tuna-markets/>

⁵¹ <https://www.aircargonews.net/data/clive-airfreight-market-improves-for-fourth-consecutive-month/>

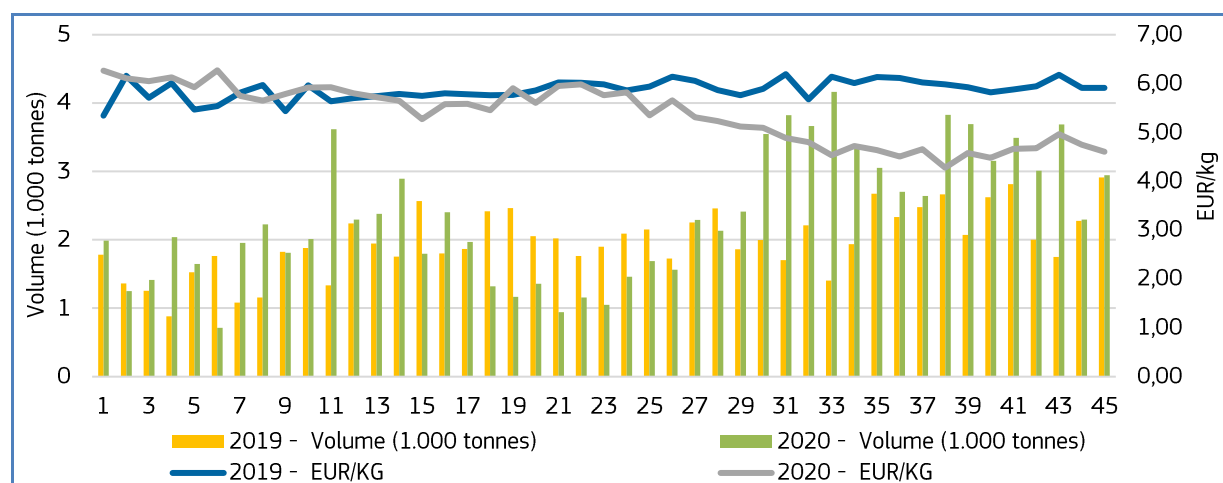
In general, internal transportation within Europe has not experienced any large disruptions, but there are some exceptions (for example, reports point to challenges in transportation of fresh seafood of Irish origin to Spain). In the UK, exports to the EU have not been a problem in terms of available vehicles. However, there is a fear that trucks may be stopped or detained at borders, and the product will not be delivered on time or at all to the final destination (this could be partially due to the impending end of the UK's transition period following the EU exit, and not solely due to lockdowns). In Europe, some receivers have limited operations, meaning deliveries may have to be stored or returned⁵².

4.5. Markets

For the most part, European processors and traders relying on imported raw material from non-EEA countries have not experienced supply shortages in recent months. However, there have been some delivery delays and some sectors have turned to alternative sourcing.

Ecuador, India and Vietnam are the primary suppliers of warmwater shrimps to the EU. In May, supply from both Ecuador and India fell sharply due to the pandemic. From July to October, EU imports of frozen warmwater shrimps from Ecuador rose steeply. This was a result of China suspending imports of Ecuadorian products after detecting the COVID-19 virus in shrimp shipments⁵³. Record high shipments of frozen shrimps to the EU market contributed strongly to a 19% fall in prices during the 3rd quarter of 2020. Another drop in Ecuadorian shrimp prices occurred in the beginning of November 2020⁵⁴.

Figure 52. **WEEKLY EU IMPORTS OF FROZEN WARMWATER SHRIMP FROM ECUADOR – WEEKS 1–45 2020**



Source: European Commission – DG TAXUD.

Chinese import restrictions on frozen seafood have had many implications. China has announced that traces of COVID-19 have been detected in imported frozen seafood products or their packaging, including shrimp from Ecuador and lately from Saudi Arabia, as well as squid from Russia and fish from Norway and Indonesia. A comprehensive test regime on imported seafood has been introduced in China, including requirements that refrigerated and frozen food imports must be disinfected before they are put into the market⁵⁵. In a worst-case scenario, this may lead to changes in trade flows, as Chinese imports may be impacted and consequently their processing industry, which in turn could lead to reduced exports of processed products from China.

However, there are other risk factors on EU market players' minds. These include a potential escalation of trade disputes with the USA, which could impact tariffs and sourcing of Alaska pollock and Pacific salmon to EU processors. Finally, stakeholders in the seafood industry are worried about the risks related to Brexit, including fishing opportunities, market access and sourcing.

⁵² <https://www.dbschenker.com/global/meta/customer-information>

⁵³ <https://www.reuters.com/article/us-health-coronavirus-china-shrimp-idUSKBN24B234>

⁵⁴ <https://www.undercurrentnews.com/2020/11/10/ecuadorian-shrimp-prices-in-free-fall-with-further-drop-expected/>

⁵⁵ <https://edition.cnn.com/2020/11/13/health/china-frozen-food-coronavirus-intl-hnk/index.html>

5. Case study – Brown shrimp in the EU

Brown shrimp is a seasonal species caught by the EU fleet (mainly Dutch and German vessels), mostly in the southern North Sea. The majority of landings is exported to Morocco for peeling and then re-exported to the EU market. In 2018, landings of brown shrimp in the EU reached 45.206 tonnes, for a total value of EUR 171 million. Dutch ports received more than half of the total volume and German ports received more than one third; both countries reported doubled landings compared with 2017. Belgium is the main consumer market in the EU.

5.1. Biology, resource, and exploitation



Biology

The brown shrimp (*Crangon crangon*) is a species of benthic caridean shrimp. It has a high rate of reproduction and a short lifetime, from one to possibly three years. It is commercially important and it is fished mainly in the southern North Sea, although it can be found in the Irish Sea, Baltic Sea, Mediterranean Sea, and Black Sea, as well as off much of Scandinavia and off parts of Morocco's Atlantic coast. The species is found on fine sand or slightly muddy sand, in coastal and brackish waters at depths between 0 and 50 m. Its common names include brown shrimp, common shrimp, bay shrimp, grey shrimp, and sand shrimp. It feeds on small benthic organisms (small crustaceans, annelids, and molluscs) and discards from fisheries. Adults are typically 30–50 mm in length, though length can reach 90 mm⁵⁶.

Resource, exploitation, and management in the EU

The brown shrimp is mainly caught in the North Sea by German, Dutch and Danish fishermen using beam trawlers or from the shore using hand-nets. In these three Member States (the Netherlands, Germany, and Denmark), which together represent 95% of the total North Sea production of brown shrimps, the fishery has a significant economic and social importance, with the species being targeted by over 500 fishing vessels⁵⁷.

The North Sea brown shrimp is not restricted by a total allowable catch (TAC). A licence system for brown shrimp fisheries exists in the Netherlands, Germany, Denmark, Belgium and the UK. The only European legislation on brown shrimp fisheries considers technical measures (the use of sieve nets and minimum mesh sizes)⁵⁸. Other management initiatives are local and include licences and closed areas. In addition, the EU has established a minimum commercial size for marketing shrimps after landing⁵⁹. The width of the shell must be at least 6,8 mm for size-1 shrimps and at least 6,5 mm for size-2 shrimps (Council Regulation 2019/1241)⁶⁰.

5.2. Production

Catches

Global production of brown shrimp amounted to 51.179 tonnes in 2018, caught exclusively by the EU fleet. The leading producers were the Netherlands, Germany and, to a lesser extent, Denmark, which respectively provided 54%, 35%, and 6% of the total production in 2018. Other important producers were Belgium (3%), the UK (2%) and France (1%).

⁵⁶ <https://www.sealifebase.ca/summary/Crangon-crangon.html>

⁵⁷ [https://www.europarl.europa.eu/RegData/etudes/etudes/join/2011/460041/IPOL-PECH_ET\(2011\)460041_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/etudes/join/2011/460041/IPOL-PECH_ET(2011)460041_EN.pdf)

⁵⁸ EU Council Regulation 850/98.

⁵⁹ <https://www.eumofa.eu/documents/20178/109202/MH+10+2017.pdf>

⁶⁰ https://mare.istc.cnr.it/fisheriesv2/species_en?sn=13242#ecl-accordion-header-comb-nomencl

Over the last decade (2009–2018), catches of brown shrimp have experienced a 19% increase, mostly attributable to Dutch catches (+41%). This is due to a very strong increase in catches from 2017 to 2018. However, decreasing long-term trends have been reported by Belgium (–11%), and France (–40%). Strong fluctuations occurred over the decade, as the abundance of the stock is highly dependent of environmental conditions.

Table 24. **TOTAL EU CATCHES OF BROWN SHRIMP (volume in tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Netherlands	19.416	18.939	18.023	16.909	20.280	23.565	19.226	18.465	13.664	27.385
Germany	17.315	18.379	17.036	16.360	16.165	15.850	13.931	7.690	8.912	17.892
Denmark	3.099	3.140	3.010	3.143	2.826	3.104	2.107	1.626	1.743	3.055
Belgium	1.585	2.078	769	880	1.226	1.178	666	1.090	717	1.413
United Kingdom	1.064	921	397	926	860	595	324	806	570	1.125
France	441	451	266	289	414	311	178	314	264	263
Others	230	162	179	146	112	232	246	69	67	46
Total	43.150	44.070	39.680	38.653	41.883	44.835	36.678	30.060	25.937	51.179

Source: FAO.

Landings in the EU

In 2018, landings of brown shrimp in the EU amounted to 45.206 tonnes for a total value of EUR 171 million. The Netherlands (53% of the total volume) and Germany (34%) were the major landing countries for this species. In these major producing countries, the majority of catches is cooked (boiled) onboard before landing⁶¹. Over the 2009–2018 period, brown shrimp landings experienced a 23% increase in volume (primarily due to a very strong increase in 2018) despite strong fluctuations. In value, the increase in real terms from 2009 was by 50%⁶², but compared with 2017 the variation was negligible.

Table 25. **LANDINGS OF BROWN SHRIMP IN THE EU (volume in tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Netherlands	15.127	14.044	13.296	11.907	15.475	19.060	16.693	16.157	11.855	24.001
Germany	14.107	15.186	14.197	13.930	12.592	12.308	10.928	5.881	6.984	15.370
Denmark	4.808	4.570	4.828	4.219	3.476	3.722	2.474	1.929	2.016	3.605
United Kingdom	1.063	914	377	926	859	600	324	803	569	1.125
Belgium	444	612	336	254	508	513	321	456	349	803
France	387	397	258	313	397	325	175	303	258	254
Others	912	602	158	141	110	229	247	67	64	49
Totals	36.849	36.323	33.450	31.687	33.417	36.758	31.163	25.596	22.096	45.206

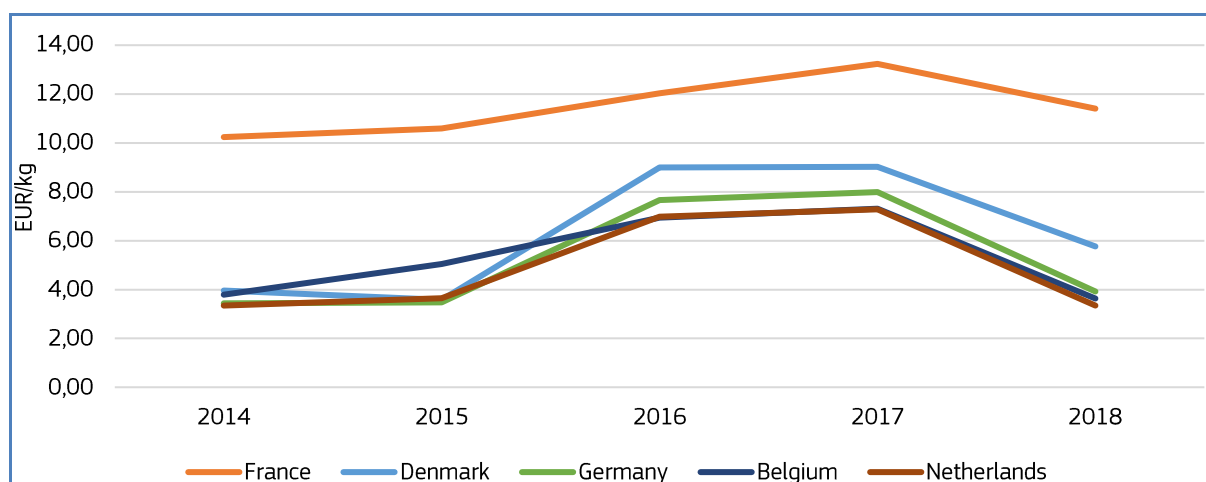
Source: FAO.

Over the 2014–2018 period, average yearly prices in main producing countries all followed the same trend: increases from 2014 to 2017, due to lower landed volumes, and a sharp decrease in 2018, due to strong increases in landed volumes. Prices were higher in France (above 10,00 EUR/kg) than in other main producing countries.

⁶¹ The difference with volume of catches provided above is then likely to be due to the fact that catches are provided in live weight equivalent whereas landings are provided in product weight (in this case after cooking onboard).

⁶² Values are deflated by using the GDP deflator (base=2015).

Figure 53. **BROWN SHRIMP: AVERAGE YEARLY PRICES AT LANDING STAGE IN MAIN PRODUCING COUNTRIES (EUR/KG)**



Source: EUMOFA.

Processing and marketing

The brown shrimp market is composed mainly of fresh/chilled products. The sector is strongly concentrated. In 2011, the EU market was more than 80% controlled by two Dutch companies, Heiploeg and Klaas Puul, which used to buy together about 30.000 tonnes of brown shrimp per year. These processors export brown shrimp to Morocco for peeling. The heavy use of preservatives (benzoic acid, sorbic acid) ensures a longer product life.

Belgium accounts for more than half of the total EU consumer market for brown shrimp, followed by the Netherlands and Germany. More than 90% of the EU market is made up by peeled shrimps. The main market for unpeeled shrimp is France, followed by Belgium. In Denmark, there is no domestic market for brown shrimp and only small volumes are sold to local restaurants, whereas most of the volume is exported to the Netherlands or other markets; nonetheless, some processing operations are done in Denmark as important shrimp processing activities occur for other cold-water shrimp species (*Pandalus borealis*) in the country⁶³.

For a number of weeks in 2020, measures taken by the Moroccan government in response to the Covid-19 outbreak led to very limited activity of the factories where brown shrimp are usually peeled. This strongly limited the activity of the Dutch fleet targeting brown shrimp⁶⁴.

5.3. International trade

In the combined nomenclature (CN) used for registering import-export data, brown shrimp is specifically reported as whole, fresh/chilled or frozen (cooked or not)⁶⁵. Unfortunately, other preservation states of this species cannot be distinguished, especially prepared/preserved products, which are reported as “miscellaneous” prepared/preserved shrimp products. As a result, peeled shrimp from Morocco cannot be distinguished using available data.

In 2019, the EU had a positive trade balance for whole brown shrimp, amounting to EUR 100 million. Most of this balance is attributable to exports of frozen and fresh brown shrimp to Morocco, where they are peeled and sent back to the EU market for consumption. Extra-EU imports of whole fresh and frozen brown shrimp are very limited (EUR 0,3 million for 93 tonnes in 2019), and are almost exclusively from Morocco. Imports of peeled shrimps from Morocco are reported under

⁶³ [https://www.europarl.europa.eu/RegData/etudes/etudes/join/2011/460041/IPOL-PECH_ET\(2011\)460041_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/etudes/join/2011/460041/IPOL-PECH_ET(2011)460041_EN.pdf)

⁶⁴ <https://industriaspesqueras.com/noticia-61473-seccion-Sector-Pesquero>

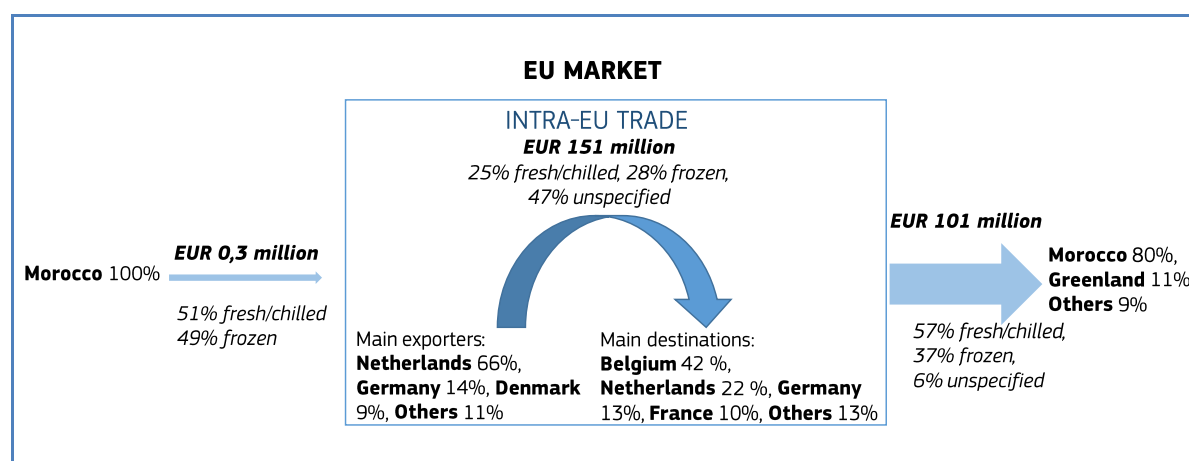
⁶⁵ CN codes: 0306 16 91 Frozen shrimps of the species *Crangon crangon*, 0306 26 31 Shrimps of the species *Crangon crangon* Fresh or chilled, or cooked by steaming or by boiling in water, 0306 26 39 Shrimps of the species *Crangon crangon*, other preservation states.

prepared/preserved shrimp products code, not specifying the species (more than 16.000 tonnes were imported by the EU from Morocco under this CN code in 2019, but could include other shrimp species than Crangon species).

In 2019, intra-EU exports reached EUR 151 million for almost 22.000 tonnes. Of the total value, 25% was covered by fresh products, 28% by frozen products and 47% by products with unspecified preservation state. The Netherlands were by far the main brown shrimp supplier to other EU countries, whereas Belgium was the main destination.

Extra-EU exports in 2019 amounted to EUR 101 million for 30.146 tonnes. Fresh and frozen products accounted for 57% and 37%, respectively, with the remaining 6% reported under unspecified preservation state. Most of these exports are made by Dutch processing companies sending whole shrimp for peeling in Morocco; in 2019, these companies accounted for 80% of the total extra-EU exports in value terms.

Figure 54. **THE BROWN SHRIMP EU-TRADE MARKET IN 2019, IN VALUE⁶⁶**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

5.4. First sales in the EU

The monthly data for first sales highlights the strong seasonality of the brown shrimp fishery, with the highest volumes sold in autumn in the main producing countries, namely the Netherlands and Denmark⁶⁷. In both countries, first-sales volumes peak in autumn, although data from Denmark seem to have two peaks, one in spring and one in autumn. However, there can be variations from one year to another.

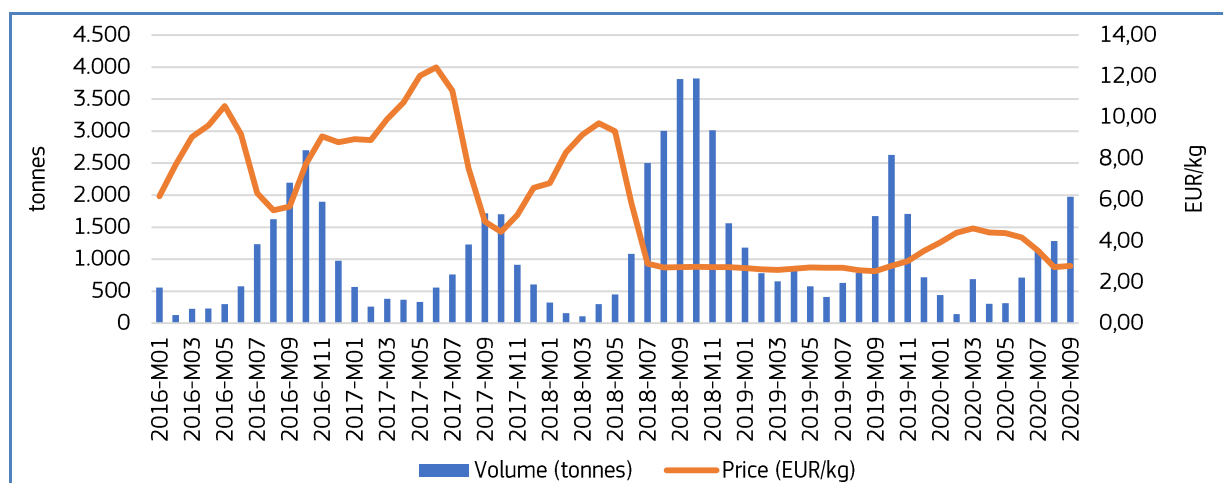
During the fishing season, monthly first-sales volumes in the Netherlands fluctuate between 1.000 and 4.000 tonnes, whereas they are lower in Denmark (between 100 and 500 tonnes). In 2019, the main places of sale for brown shrimp in the Netherlands were Wieringen/Den Oever, Zoutkamp, Harlingen and Lauwersoog. In Denmark, the main places of sale were Hvide Sande, Esbjerg, and Havneby.

The seasonality of supply leads to very strong price fluctuations (from 2,50 to almost 14,00 EUR/kg). Usually, the price drops when volumes increase as the fishing season progresses from spring to autumn, and sharply increases at the end of the fishing season. This pattern is less clear in Danish first-sales data. However, in both countries, from July 2018 to September 2019, prices stayed very stable at their lowest level, around 2,70 EUR/kg, before going back to usual seasonal fluctuations (to a lesser extent, however). This unusual price stability could be explained by the high volumes landed in 2018 due to high abundances in the North Sea, leading to a potential saturation of the EU market.

⁶⁶ Preserved brown shrimp is excluded from this figure as it is not specifically reported in trade data (it is included in prepared/preserved miscellaneous shrimp).

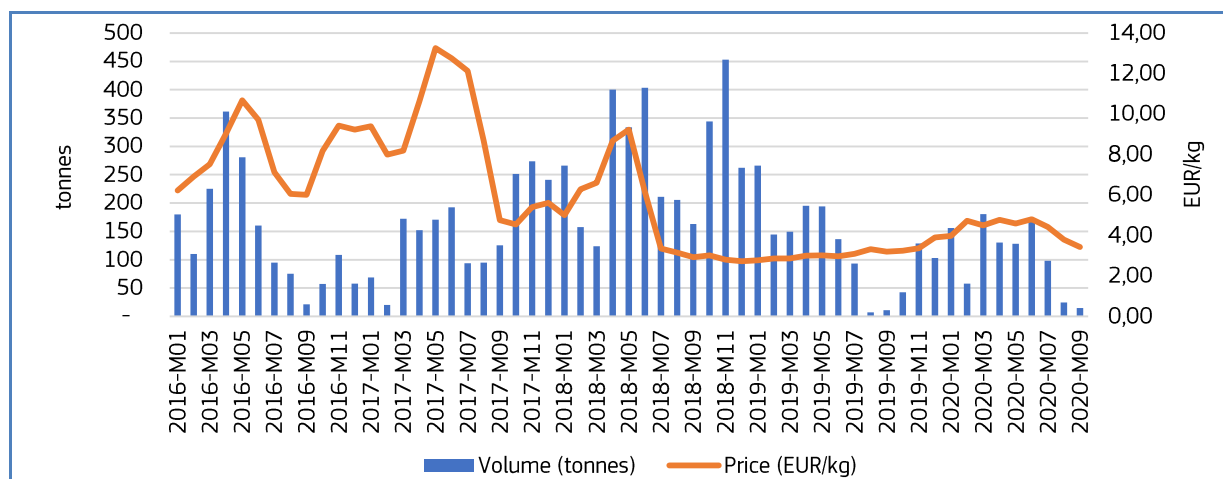
⁶⁷ German first-sales data are not available yet on EUMOFA. Their release is foreseen for 2021.

Figure 55. **FIRST SALES: BROWN SHRIMP IN THE NETHERLANDS**



Source: EUMOFA

Figure 56. **FIRST SALES: BROWN SHRIMP IN DENMARK**



Source: EUMOFA

6. Global highlights

EU / DG MARE: DG MARE is carrying out a public consultation on the revision of EU marketing standards regarding seafood products. These standards define quality characteristics and certain requirements for content and presentation of EU and non-EU products placed on the EU's internal market. The aims of this consultation are to give citizens and organisations the opportunity to inform policy development, and to gather opinions on policy options and their potential impacts. The consultation will close on 23 February 2021. Contribution to this consultation can be given via the following [link](#)⁶⁸.

EU / Fishing opportunities: In October, the Council reached an agreement on 2021 fishing opportunities in the Baltic Sea, focusing on fish stock recovery. Ministers agreed to continue decreasing the fishing opportunities for several fish stocks in the Baltic Sea, in order to help them recover. Ministers decided to continue the closure of the Eastern Baltic cod fishery and to provide only a bycatch quota, which was again significantly lower than last year's. The biggest cut in the Total Allowable Catches (TACs) was for herring in the Western and Central part of the Baltic Sea, in line with the latest scientific advice. Ministers agreed on a moderate increase of the TACs for herring in the Gulf of Riga, and Western Baltic cod, plaice, sprat and salmon in the main basin area of the Baltic Sea, while TAC for salmon in the Gulf of Finland will be moderately reduced. TACs for Bothnian herring will remain at the same level as last year⁶⁹.



EU / Fisheries: The European Commission has proposed Total Allowable Catches (TAC), based on scientific advice by ICES, on three deep-sea stocks for 2021 and 2022, to allow limited fisheries. These stocks are fished exclusively in EU waters by EU Member States. They are: roundnose grenadier in Skagerrak and Kattegat; red seabream in the Iberian waters; and black scabbardfish in the Bay of Biscay, Iberian waters and the Azores. Among other proposals there is a general prohibition on fishing deep-sea sharks, a further restriction compared to previous years where limited bycatches were allowed under specific conditions⁷⁰.

NAFO / RFMO: The 42nd Annual Meeting of the Regional Fisheries Management Organisation (RFMO) Northwest Atlantic Fisheries Organization (NAFO), took place from 21-25 September. Due to the current global pandemic, NAFO conducted the Annual Meeting virtually for the first time in its history. The United Kingdom became NAFO's 13th Contracting Party. In addition to the traditional Total Allowable Catch (TAC) and quota decisions for 2021, other significant decisions were made, including additional conservation measures agreed for cod, which comprise: a closure of the fishery in question from January until March 2021; increased port inspection requirements; and introduction of sorting grids to protect juvenile fish⁷¹.

UAE / Supply: With an average consumption of 25.3 kg/capita per year, the population of the United Arab Emirates (UAE) consumes more seafood than the global average, but imports largely outpace national production from fisheries and aquaculture in the supply of the domestic market (82% versus 18%). According to the Food and Agriculture Organisation, in 2017, total aquaculture production in the United Arab Emirates was 3.255 tonnes and comprised of various finfish and crustacean species, with gilthead seabream being the most produced species (1.810 tonnes)⁷².

Tunisia / COVID-19: The COVID-19 crisis has had many social and economic impacts in North African countries, including Tunisia. The fishing and aquaculture industries in Tunisia have been affected by disrupted production and obstacles to marketing. Fishery production reached 36.000 tonnes in May 2020 in Tunisia, compared to 54.000 tonnes registered in the same period of 2019, a drop of 33% according to the Directorate General of Fisheries and Aquaculture. Aquaculture production, mainly gilthead seabream, fell from 1.596 tonnes in May 2019 to 565 tonnes in May 2020, a decrease of 65%, resulting in significant economic losses⁷³.

⁶⁸ <https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/12262-Review-of-the-marketing-standards-framework-for-fishery-and-aquaculture-products/public-consultation>

⁶⁹ <https://www.consilium.europa.eu/en/press/press-releases/2020/10/20/baltic-sea-fishing-council-agrees-on-2021-catch-limits/>

⁷⁰ https://ec.europa.eu/fisheries/press/deep-sea-fisheries-commission-proposes-measures-protect-stocks-north-east-atlantic_en

⁷¹ https://www.nafo.int/Portals/0/PDFs/press/PressRelease_AM2020.pdf

⁷² Supporting Sustainable and Innovative Aquaculture in the United Arab Emirates <http://www.fao.org/3/cb1550en/CB1550EN.pdf>

⁷³ Preliminary Analysis of the Impact of COVID-19 on the Fishery and Aquaculture Sectors in Tunisia <http://www.fao.org/3/cb1550en/CB1550EN.pdf>

7. Macroeconomic Context

7.1. Marine fuel

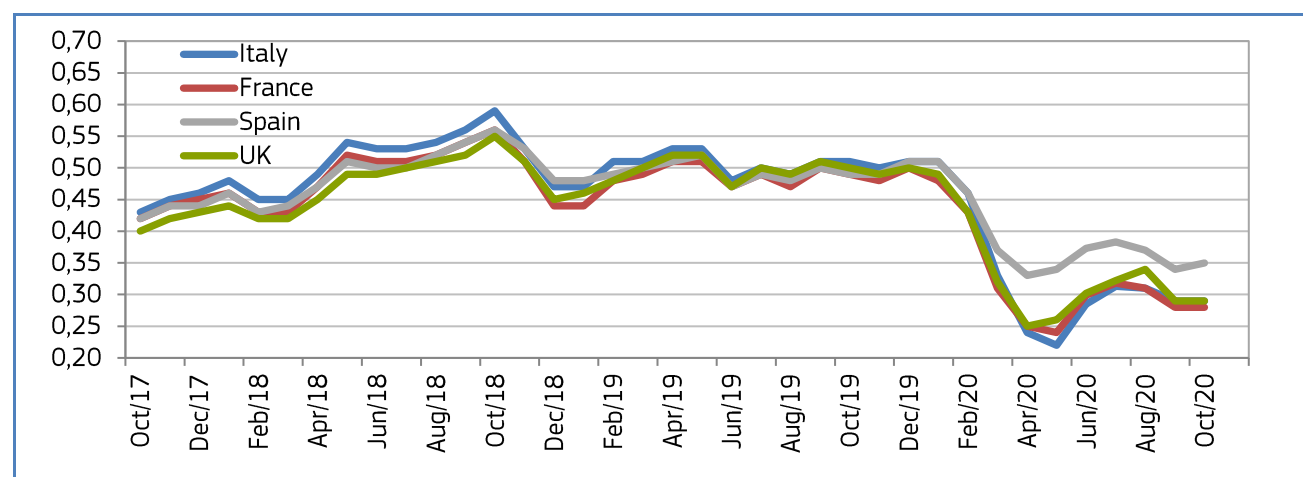
Average prices for marine fuel in **October 2020** ranged between 0,28 and 0,35 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices increased about 1% compared with the previous month, however it decreased 41% compared with the same month in 2019.

Table 26. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Oct 2020	Change from Sep 2020	Change from Oct 2019
France (ports of Lorient and Boulogne)	0,28	0%	-43%
Italy (ports of Ancona and Livorno)	0,29	0%	-43%
Spain (ports of A Coruña and Vigo)	0,35	3%	-29%
The UK (ports of Grimsby and Aberdeen)	0,29	0%	-42%

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

Figure 57. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

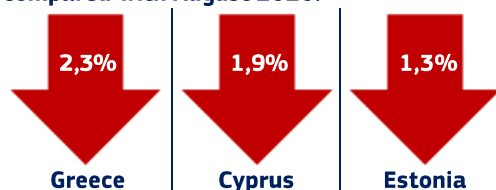


Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

7.2. Consumer prices

The EU annual inflation rate was at 0,3% in September 2020, down from 0,4% in August. A year earlier, the rate was 1,2%.

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



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

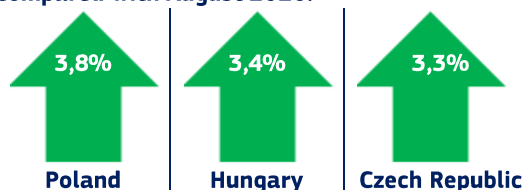


Table 27. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

HICP	Sep 2018	Sep 2019	Aug 2020	Sep 2020	Change from Aug 2020	Change from Sep 2019
Food and non-alcoholic beverages	104,65	106,73	108,99	108,66	↓ 0,3%	↑ 1,8%
Fish and seafood	109,28	111,07	113,05	112,61	↓ 0,4%	↑ 1,4%

Source: Eurostat.

7.3. Exchange rates

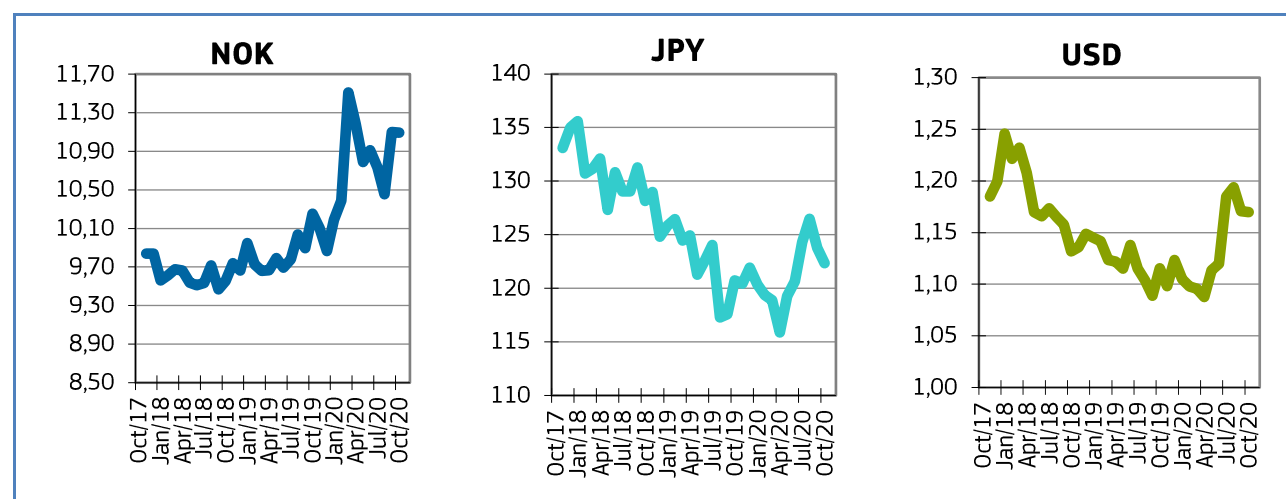
Table 28. **EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Oct 2018	Oct 2019	Sep 2020	Oct 2020
NOK	9,4665	10,2520	10,7323	11,0940
JPY	131,23	120,73	124,31	122,36
USD	1,1576	1,1154	1,1848	1,1698

Source: European Central Bank.

In October 2020, the euro depreciated against the Norwegian krone and the Japanese yen (-0,1% and -1,1%, respectively), and slightly appreciated against the US dollar (+0,1%) relative to the previous month. For the past six months, the euro has fluctuated around 10,85 against the Norwegian krone. Compared with October 2019, the euro has appreciated 1,4% against the Japanese yen, 8,2% against the Norwegian krone, and 4,9% against the US dollar.

Figure 58. **TREND OF EURO EXCHANGE RATES**



Source: European Central Bank.

Manuscript completed in October 2020

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

First sales: European Commission, European Council, Institute of Marine Research-Bergen, ICCAT, abcomunicazioni.it, Pelagic Advisory Council.

Consumption: EUROPANEL.

Case studies: SeaLifeBase, European Parliament, EU Council, DG MARE, FAO, Industrias Pesqueras, European Centre for Disease Prevention and Control, WHO, DW, Schengen Visa Info, Euronews, European Commission, EMODNET, Fiskeauktion Denmark, Devpolicy, Intrafish, Mercamadrid, Fisch-Informationszentrum, PDG Seafoodmag, Deloitte, AirCargo News, Undercurrent News, DB Schenker, Reuters, CNN.

Global highlights: DG Mare - European Commission, FAO, NAFO.

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

EUMOFA Privacy Policy