

Contextual information

to interpret market developments of the EU fishery and aquaculture sector

July 2021

26/08/2021

This document provides an overview of what happened in the European sea basins in July 2021, highlighting the main factors that might have had an impact on the fisheries and aquaculture sector. It is a support document to better interpret and contextualise the variations described in the [EUMOFA's monitoring report](#). Indeed, looking at the market from different points of view might help better understand its variations. Currently, two events are having an impact on the fishery and aquaculture sector: the COVID-19 pandemic and the withdrawal of the United Kingdom from the European Union. While establishing whether the trends described in the report are due to COVID-19 and/or Brexit cannot be done with certainty, it is possible to exclude their involvement if other explanations can be provided.

Geographic coverage: Baltic Sea, Bay of Biscay and Iberian coast, Celtic Sea, Mediterranean Sea, North Sea, and Black Sea.

Content

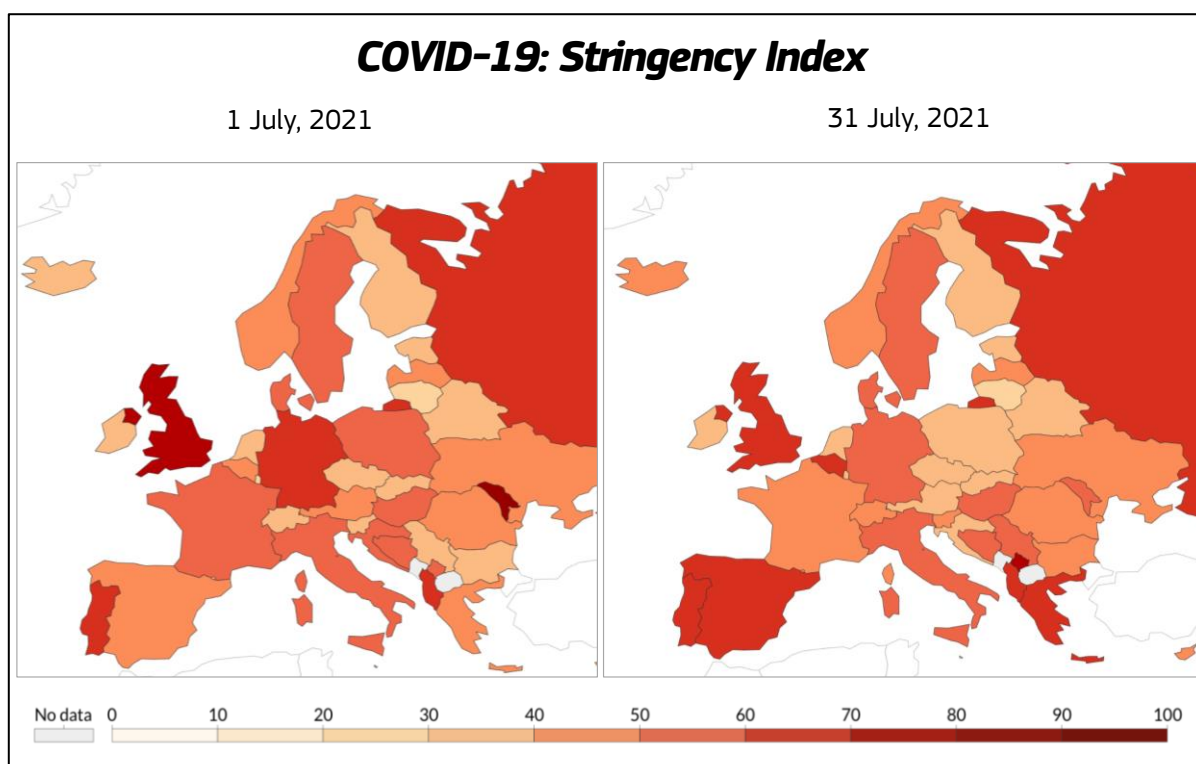
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Overview on COVID-19 response measures taken

A quick overview of the measures undertaken by each country is provided through the “COVID-19 Stringency Index” developed by the University of Oxford’s Blavatnik School of Government. The Stringency Index measures the rigidity of measures adopted by governments to face the pandemic spread. This index is based on nine indicators including the closure of schools, workplaces, public transport, the ban on movement, gathering and all relevant actions that countries have been adopting since the start of the pandemic. The following maps show the situation at the beginning and at the end of July 2021.

Figure 1 - Response measures undertaken by countries in the European sea basins



Source: Stringency Index. Data published by: Thomas Hale, Noam Angrist, Rafael Goldszmidt, Beatriz Kira, Anna Petherick, Toby Phillips, Samuel Webster, Emily Cameron-Blake, Laura Hallas, Saptarshi Majumdar, and Helen Tatlow. (2021). “A global panel database of pandemic policies (Oxford COVID-19 Government Response Tracker).” *Nature Human Behaviour*. <https://doi.org/10.1038/s41562-021-01079-8>.¹

According to the Stringency Index, most of the EU Member States remained stable or have lightened the measures adopted to face the COVID-19 pandemic spread. Measures were slightly reinforced in some countries of Western Europe (Austria and Belgium), and Southern Europe (Croatia, Greece and Spain).

¹ Map available at: <https://www.bsg.ox.ac.uk/research/research-projects/oxford-covid-19-government-response-tracker>



Weather

The weather conditions in July 2021 appeared to be warm (Baltic Sea, Mediterranean Sea and North Sea) or rainier (Bay of Biscay and Iberian coast and Celtic Sea) than those recorded in the same month of the previous year. They do not seem to have had a major impact on the fishery activities.

Figure 2 - Weather conditions in July 2021 compared with July 2020

Sea basin	Impact: low, medium, high	Comments
Baltic Sea		The weather conditions were appropriate for fishing, with weather and water temperature higher than usual for July.
Bay of Biscay and Iberian coast		The weather was rainier and with lower temperatures than past years.
Celtic Sea		The weather was rainy and windy especially during the first part of the month, while a heat wave was observed around the third week of the month.
Mediterranean Sea		The weather was particularly warm in several Mediterranean countries, with surface temperatures reached above 50 degrees in many locations.
North Sea		The weather was mainly warm with severe rainfall and windy conditions at the end of the month.



Fishing or market closures and openings

Baltic Sea

As for June 2021, the “Council Regulation (EU) No 2020/1579 of 29 October 2020 fixing for 2021 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Baltic Sea and amending Regulation (EU) 2020/123 as regards certain fishing opportunities in other waters” provides that in July 2021 it shall be prohibited to fish with any type of fishing gear in FAO areas 24, 25, and 26. An exemption from the prohibition applies to EU fishing vessels of less than 12 meters in length operating in waters with depth than 20 meters.²

Celtic Sea

On 1 July, the International Council for the Exploration of the Sea (ICES) published an updated version of its Advice on fishing opportunities, catch and effort for 2022 for the Celtic Seas and Oceanic Northeast Atlantic ecoregions. The Advice, which concerns haddock (*Melanogrammus aeglefinus*) in Division 6.b (Rockall), stated that “when the MSY approach is applied, catches in 2022 should be no more than 5.825 tonnes”.³

Mediterranean Sea and Black Sea

On 9 July, the General Fisheries Commission for the Mediterranean and the European Union adopted the 2030 Strategy for sustainable fisheries and aquaculture in the Mediterranean and the Black Sea, which aims to secure a sustainable future for fisheries and aquaculture in these sea basins. The 10-year strategy identifies the adoption of several key actions including: to extend fisheries management measures to all main fisheries (including small-scale and recreational fisheries), to strengthen monitoring, control and surveillance towards the eradication of illegal, unreported and unregulated (IUU) fishing, as well as to reduce and mitigate incidental catch of vulnerable species. The GFCM strategy is available at this [link](#).

North Sea

Based on Commission Regulation (EC) No 724/2010 of 12 August 2010⁴, Denmark has established a Real Time Closure (RCT) in an area of in Skagerrak from 24 June to 14 July 2021⁵. The area is closed for fishing except for the following gears: pelagic trawls, purse seine, driftnets and jiggers targeting herring, mackerel, and horse mackerel, pot, scallop dredges, and gillnets.

² Council Regulation (EU) 2020/1579 of 29 October 2020: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2020.362.01.0003.01.ENG

³ ICES. 2021. Haddock (*Melanogrammus aeglefinus*) in Division 6.b (Rockall). In Report of the ICES Advisory Committee, 2021. ICES Advice 2021, had.27.6b. <https://doi.org/10.17895/ices.advice.7762>.

⁴ Commission Regulation (EC) no 724/2010 of 12 August 2010, available at <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2010:213:0001:0005:EN:PDF>

⁵ For more information, please visit: <https://fiskeristyrelsen.dk/english/fishery-control-and-enforcement/real-time-closures/#c83732>

From all sea basins

On 30 July, a new report on Quota Swaps between EU and the United Kingdom was agreed. More details are available at this [link](#).

Total Allowable Catches uptake

The following table reports the Total Allowable Catches (TAC) uptake per sea basin and for selected species consumed and/or utilized up to July 2021.⁶

Figure 3 - TAC uptake⁷

Sea basin	Species	Adapted quotas	Total catches	% consumed up to July 2021
Baltic sea	Cod	6.550	1.902	29%
	European plaice	23.390	4.598	20%
	Herring	281.439	149.966	53%
	Norway lobster	12.382	3.398	27%
Bay of biscay	Anchovy	15.005	6.451	43%
	Common sole	3.399	2.184	64%
	Hake	50.911	20.206	40%
	Norway lobster	4.360	2.579	59%
Black sea	Sprat (=Brisling)	11.475	1.706	15%
	Turbot	150	75	50%
Celtic sea	Common sole	5.110	1.855	36%
	Haddock	15.903	5.508	35%
	Monk	33.941	14.332	42%
	Norway lobster	14.098	5.228	37%
Mediterranean sea	Bluefin tuna	22.168	15.945	72%
	Swordfish	6.560	2.251	34%
North sea	Cod	9.601	3.543	37%
	Common sole	18.525	4.365	24%
	European plaice	102.128	15.908	16%
	Norway lobster	3.093	1.155	37%

⁶ Data provided by FIDES (Fisheries Data Exchange System).

⁷ Data for Bulgaria, Greece and Romania are not included in the table.



Other highlights

Bay of Biscay and Iberian coast

According to the weekly first sales data available⁸, the top species in this sea basin in terms of value in July 2021 were the following.

Figure 4 - Top species in terms of value in selected locations in the Bay of Biscay and Iberian coast in July 2021 (weeks 26-30)









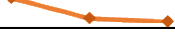
Weekly first sales		Time frame: W26-30			
Volume (KG)	2019	2020	2021	Trend	
Hake	1.959.238,46	1.836.999,52	638.190,18		
Lobster, Norway	188.418,00	252.858,90	252.359,70		
Monk	876.462,35	666.907,24	205.973,75		
Octopus	551.115,86	239.104,47	241.735,62		
Sardine	2.829.896,35	3.100.774,27	2.723.166,36		
Value (EUR)	2019	2020	2021	Trend	
Hake	7.334.027,81	6.530.941,92	3.104.280,03		
Lobster, Norway	2.217.315,98	2.791.132,22	2.722.536,41		
Monk	4.420.763,49	3.479.427,17	1.442.808,66		
Octopus	3.391.958,26	1.485.905,49	2.005.009,25		
Sardine	4.552.172,41	4.883.379,31	3.373.644,04		
Price (EUR/kg)	2019	2020	2021	Trend	
Hake	3,74	3,56	4,86		
Lobster, Norway	11,77	11,04	10,79		
Monk	5,04	5,22	7,00		
Octopus	6,15	6,21	8,29		
Sardine	1,61	1,57	1,24		

⁸ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France, Portugal and Spain. Thus, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 3 refer to, please see Annex below in this document.

Black sea

The following table reports monthly first sales data for July in Bulgaria⁹. It appears that volumes of clam and sprat strongly increased in 2021 compared with the same month of 2020, thus recovering from the drop reported in 2020, while volumes of red mullet maintained the upward trend showed in July 2020.

Figure 5 - Top species in terms of value for the month of July 2021

Monthly first sales		Time frame: July		
Volume (KG)	2019	2020	2021	Trend
Clam	58.713	7.014	68.973	
Red mullet	41.146	41.707	46.850	
Sprat (=Brisling)	354.107	179.788	496.544	
Value (EUR)	2019	2020	2021	Trend
Clam	148.114	24.439	144.477	
Red mullet	27.040	27.805	52.520	
Sprat (=Brisling)	113.517	45.627	119.098	
Price (EUR/kg)	2019	2020	2021	Trend
Clam	2,52 €	3,48 €	2,09 €	
Red mullet	0,66 €	0,67 €	1,12 €	
Sprat (=Brisling)	0,32 €	0,25 €	0,24 €	

⁹ The most recent monthly first sales data for July 2021 are available via the EUMOFA website and can be accessed [here](#).

Mediterranean Sea

According to the weekly first sales data available¹⁰, the top species in this sea basin in terms of value in July 2021, were the following.

Figure 6 - Top species in terms of value in selected locations in the Mediterranean Sea in July 2021 (weeks 26-30)

Weekly first sales		Time frame: W26-30		
Volume (KG)	2019	2020	2021	Trend
Mackerel	130,30	899,60	1.238,30	
Sardine	221.945,26	19.061,53	34.946,60	
Shrimp, miscellaneous	32.580,17	33.641,17	16.166,23	
Swordfish	44.114,00	71.473,00	39.715,50	
Value (EUR)	2019	2020	2021	Trend
Mackerel	900,47	5.670,67	10.375,27	
Sardine	61.615,61	5.935,23	10.424,79	
Shrimp, miscellaneous	1.340.753,20	1.229.707,14	731.457,09	
Swordfish	313.268,50	467.753,39	278.412,55	
Price (EUR)	2019	2020	2021	Trend
Mackerel	6,91	6,30	8,38	
Sardine	0,28	0,31	0,30	
Shrimp, miscellaneous	41,15	36,55	45,25	
Swordfish	7,10	6,54	7,01	

¹⁰ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France and Spain. Therefore, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 4 refer to, please see Annex below in this document.

Marine gasoil prices in July 2021

Price of gasoil¹¹ in the monitored sea basins remained stable between June and July 2021. A slight change was observed in the North Sea, where gasoil prices increased by 1%.

Figure 7 Marine gasoil prices

Sea basin	2021			
	May	June	July	June-July %
Baltic Sea	0,46 €	0,46 €	0,46 € =	0%
Bay of Biscay and Iberian	0,45 €	0,45 €	0,45 € =	0%
Celtic Sea	0,42 €	0,42 €	0,42 € =	0%
Mediterranean Sea	0,48 €	0,48 €	0,48 € =	0%
North Sea	0,42 €	0,41 €	0,42 € ↑	1%

¹¹ Data collected from Mabux: Marine bunker exchange and aggregated on a monthly basis.

Annex

Bay of Biscay and Iberian coast

Products and locations of the main commercial species analysed for the Bay of Biscay and Iberian coast sea basin in Figure 4.

MCS Sardine		
PRODUCT	PORT	YEAR
European pilchard(=Sardine), whole	ES - Barbate de Franco	2019-2020-2021
	ES - Isla Cristina	
Sardine, whole, size 1	FR - Saint-Guénolé	2021
Sardine, whole, size 2	PT - Matosinhos	2019-2020-2021
	PT - Olhão	
	PT - Peniche	
	PT - Portimao	
	PT - Sesimbra	2019-2020
Sardine, whole, size 3	PT - Matosinhos	2019-2020-2021
	PT - Olhão	
	PT - Portimao	2019-2020
	PT - Sesimbra	2020-2021

MCS: Hake		
PRODUCT	PORT	YEAR
Benguela hake	ES - Cadiz	2019-2020-2021
European hake, gutted, size 2	FR - Les Sables-d'Olonne	2019-2020-2021
	FR - Lorient	
European hake, whole, size 1	ES - Burela	2019-2020-2021
	ES - Cillero	
European hake, whole, size 2	ES - Burela	2019-2020-2021
	PT - Olhão	
	PT - Matosinhos	
	PT - Portimao	
	PT - Sesimbra	2021
European hake, whole, size 3	ES - Burela	2019-2020-2021
	PT - Matosinhos	
	PT - Olhão	
	PT - Peniche	2019-2020
	PT - Portimao	
	PT - Sesimbra	
European hake, whole, size 4	ES - Burela	2019-2020-2021
	ES - Pasajes	2019-2020

MCS: Lobster, Norway		
PRODUCT	PORT	YEAR
Norway lobster, alive, size 4	FR - Concarneau	2019-2020-2021
	FR - Guilvinec	
	FR - Lorient	

MCS: Octopus		
PRODUCT	PORT	YEAR
Common octopus	ES - Isla Cristina	2019-2020-2021
	ES - Santa Eugenia Ribeira	
Common octopus, whole	ES - Isla Cristina	2019-2020-2021
	PT - Matosinhos	
	PT - Olhão	
	PT - Peniche	2019
	PT - Portimao	2021
	PT - Sesimbra	

MCS: Monk		
PRODUCT	PORT	YEAR
Blackbellied angler, size 1	ES - Vigo	2019-2020-2021
Blackbellied angler, size 2	ES - A Coruña	
Monk, gutted, size 2	FR - Guilvinec	
	FR - Lorient	

Mediterranean Sea

Products and locations of the main commercial species analysed for the Mediterranean Sea in Figure 6.

MCS: Mackerel		
Product	Port	Year
Atlantic mackerel, whole, size 2	FR - Agde	2019-2020-2021

MCS: Sardine		
Product	Port	Year
Round sardinella	ES - Mazarrón	2019-2020-2021
	ES - San Pedro del Pinatar	2019-2021

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MCS: Shrimp, miscellaneous		
Product	Port	Year
Blue and red shrimp	ES - Blanes	2019-2020-2021
	ES - Palamós	
	ES - Palma de Mallorca	

MCS: Swordfish		
Product	Port	Year
Swordfish	ES - Roquetas de Mar	2019-2020-2021