



Contextual information

to interpret market developments of the EU fishery and aquaculture sector

June 2021

23/07/2021

This document provides an overview of what happened in the European sea basins in June 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

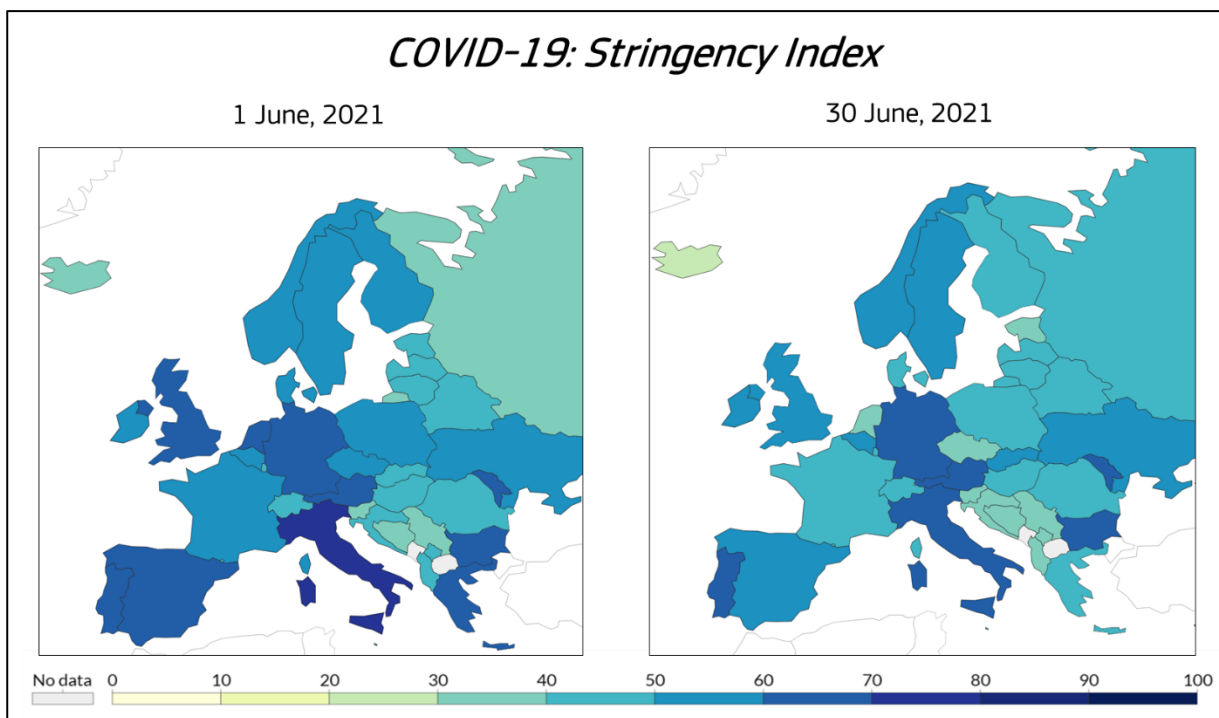
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Overview on COVID-19 response measures taken

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 June 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 have lightened the measures adopted to face the COVID-19 pandemic spread. Measures remained stable in some countries of Western and Central Europe (Austria, Belgium, Germany, Luxembourg, and Switzerland), Northern Europe (Sweden, Lithuania, and Latvia), as well as in Ireland, Portugal and Slovenia.

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



Weather

The weather conditions in June 2021 appeared to be mainly similar to 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 June 2021 compared with June 2020

Sea basin	Impact: low, medium, high	Comments
Baltic Sea		The weather conditions were appropriate for fishing, with slightly higher temperature compared with the same period of 2020.
Bay of Biscay and Iberian coast		The weather was characterized by mutable conditions, similar to those recorded in the past year.
Celtic Sea		The weather was similar compared with the same month of 2020.
Mediterranean Sea		The weather was similar compared with the same month of 2020.
North Sea		The weather was sunny and warm, and similar compared with the same period of 2020.



Fishing or market closures and openings

Baltic Sea

As for May 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 June 2021 it shall be prohibited to fish with any type of fishing gear in subdivisions 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

Black Sea

On 23 June, the European Parliament adopted a resolution on the challenges and opportunities for the fishing sector in the Black Sea.³ This underlined the need to further strengthen cooperation among the littoral Black Sea countries with a view to efficiently managing fish stocks and meeting challenges, ensuring an appropriate balance among available natural resources, environmental safety, and the maintenance of the fleet capacity of all Black Sea littoral countries. The resolution also focused on trade aspects, including the increase of awareness about local consumption and the positive effects for the local economy deriving from sustainable fishing and aquaculture, the promotion of more tailor-made approaches and policies on the small-scale fishing vessels segment, and the possibility to introduce designations of origin for Black Sea products.

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 European Parliament resolution of 23 June 2021 on the challenges and opportunities for the fishing sector in the Black Sea (2019/2159(INI)): https://www.europarl.europa.eu/doceo/document/TA-9-2021-0307_EN.html

Bay of Biscay and Iberian Coast

On 18 June 2021, the International Council for the Exploration of the Sea (ICES) published a new Advice on fishing opportunities, catch, and effort about the Bay of Biscay and the Iberian Coast. The Advice, which concerns Horse mackerel (*Trachurus trachurus*) in Division 9.a (Atlantic Iberian waters), stated that, when the Maximum sustainable yield approach is applied, catches in 2022 should be no more than 143.505 tonnes.⁴

Celtic Sea

Following the conclusion of negotiations between the United Kingdom and the European Union on catch limits for shared fish stocks for 2021, the Marine Management Organisation (MMO) provided an update on proposed changes to Celtic Sea Conservation technical measures. Proposed new measures concern all demersal otter trawls and seines in the Celtic Sea mixed fisheries; they are mainly aimed at further reducing unwanted catches of cod and whiting.⁵

Mediterranean Sea

The Directorial Decree number 168451 of 13 April 2021 “Bluefin tuna fishing campaign – 2021” published in the Official Journal of the Italian Republic no. 140 of 14 June 2021 established the 2021 bluefin tuna fishing campaign. The decree provided that the total quota of 4.745.34 tonnes, definitively assigned to Italy, for the campaign fishing 2021 is divided among the fishing systems according to the following scheme: purse seine: 72,7%, longline: 13,5%, tuna trap⁶: 8,1%; recreational fishery: 0,5%; undivided share: 5,3%.⁷

North Sea

On 11 June 2021, the Council of the European Union approved the European Union - United Kingdom agreement on fishing opportunities for 2021 and, for deep-sea stocks, for 2021 and 2022. This agreement also set out the total allowable catches (TAC) for 75 shared fish stocks for 2021, as well as for a number of deep-sea stocks, and provided clarity on access limits for non-quota species.⁸

⁴ The ICES Advice is available at: <https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2021/2021/hom.27.9a.pdf>

⁵ For more information, please visit: <https://www.gov.uk/government/news/new-fisheries-technical-measures>

⁶ For a definition of Tuna trap, please visit: https://www.europarl.europa.eu/doceo/document/P-7-2013-014163_EN.html

⁷ Directorial Decree number 168451 of 13 April 2021 “Bluefin tuna fishing campaign – 2021”:

<https://www.politicheagricole.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/16892>

⁸ A press release about the agreement is available at: <https://www.consilium.europa.eu/en/press/press-releases/2021/06/11/council-approves-eu-uk-agreement-on-fishing-opportunities/>

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 June 2021.⁹

Figure 3 TAC uptake¹⁰

Sea basin	Species	Adapted quotas	Total catches	% consumed up to June 2021
<i>Baltic sea</i>	Cod	6.550	1.681,06	26%
	European plaice	20.992,00	3.629,29	17%
	Herring	281.439,00	146.083,80	52%
	Norway lobster	12.382,44	2.870,71	23%
<i>Bay of biscay</i>	Anchovy	5744,00	4.326,91	75%
	Common sole	3.399,00	1.823,26	54%
	Hake	33.149,00	16.034,46	48%
	Norway lobster	4.360,40	1.563,08	36%
<i>Black sea</i>	Sprat (=Brisling)	11475	1705,585	15%
	Turbot	150	75,293	50%
<i>Celtic sea</i>	Common sole	3127,138	1464,838	47%
	Haddock	9810	4022,183	41%
	Monk	20522,9	11196,052	55%
	Norway lobster	8211	4164,194	51%
<i>Mediterranean sea</i>	Bluefin tuna	22168,22	11113,147	50%
	Swordfish	6560,44	712,083	11%
<i>North sea</i>	Cod	9702	3044,242	31%
	Common sole	10991	3981,547	36%
	European plaice	91288	13152,221	14%
	Norway lobster	1688	833,924	49%

⁹ Data provided by FIDES (Fisheries Data Exchange System).

¹⁰ Data for France, Italy and Portugal are not included in the table.



Other highlights

Bay of Biscay and Iberian coast

According to the weekly first sales data available¹¹, the top species in this sea basin in terms of value in June 2021 were the following.

Figure 4 Top species in terms of value in selected locations in the Bay of Biscay and Iberian coast in June 2021 (weeks 22-25)







Weekly first sales		Time frame: W22-25			
Volume (KG)	2019	2020	2021	Trend	
Hake	1.555.850,19	1.571.063,11	962.146,75		
Monk	655.367,25	629.305,10	432.599,10		
Norway Lobster	231.605,10	238.906,40	274.355,20		
Octopus	278.491,57	230.482,09	218.707,99		
Sardine	1.973.550,85	1.982.325,66	2.628.989,35		
Value (EUR)	2019	2020	2021	Trend	
Hake	5.208.139,91	5.153.818,21	4.126.503,37		
Monk	3.313.276,67	2.546.974,62	2.011.787,65		
Norway Lobster	2.167.486,60	2.373.530,51	2.384.213,66		
Octopus	1.814.862,79	1.300.169,82	1.833.158,08		
Sardine	3.726.481,20	2.940.908,03	3.923.580,24		
Price (EUR/kg)	2019	2020	2021	Trend	
Hake	3,35	3,28	4,29		
Norway Lobster	9,36	9,93	8,69		
Monk	5,06	4,05	4,65		
Octopus	6,52	5,64	8,38		
Sardine	1,89	1,48	1,49		

¹¹ 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 June in Bulgaria¹². It appears that volumes of red mullet strongly increased in 2021 compared to the same month of 2020, while volumes of sprat partially recovered from the drop reported in June 2020.

Figure 5 Top species in terms of value for the month of June

Monthly first sales		Time frame: June			
Volume (KG)	2019	2020	2021	Trend	
Red mullet	64,00	342,00	11.572,00		
Sprat (=Brisling)	285.215,00	223.653,00	250.183,00		
Value (EUR)	2019	2020	2021	Trend	
Red mullet	45,51	181,00	11.899,48		
Sprat (=Brisling)	87.939,46	67.111,67	69.901,17		
Price (EUR/kg)	2019	2020	2021	Trend	
Red mullet	0,71	0,53	1,03		
Sprat (=Brisling)	0,31	0,30	0,28		

Commitments to support small-scale fishers in the Black Sea were renewed during the high-level representatives from Mediterranean and Black Sea countries, the European Commission, FAO, the GFCM, and WWF which took place on 30 June 2021¹³. During the meeting, it was reaffirmed the commitment to fully implement the Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea.¹⁴

¹² The most recent monthly first sales data for April 2021 are available via the EUMOFA website and can be accessed [here](#).

¹³ More information about the meeting is available at: <http://www.fao.org/gfcm/news/detail/en/c/1414279/>

¹⁴ The Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea - RPOA-SSF is available at this link: <http://www.fao.org/gfcm/activities/fisheries/small-scale-fisheries/rpoa-ssf>

Mediterranean Sea

According to the weekly first sales data available¹⁵, the top species in this sea basin in terms of value in June 2021, were the following.

Figure 6 Top species in terms of value in selected locations in the Mediterranean Sea in June 2021 (weeks 22-25)

Weekly first sales		Time frame: W22-25			
Volume (KG)	2019	2020	2021	Trend	
Mackerel	162,10	1.423,30	639,90		
Miscellaneous shrimp	20.444,14	24.059,67	15.349,49		
Sardine	189.837,02	28.070,64	7.170,71		
Swordfish	26.938,50	27.919,00	42.843,20		
Value (EUR)	2019	2020	2021	Trend	
Mackerel	848,52	7.163,48	4.500,44		
Miscellaneous shrimp	861.790,24	728.201,77	677.477,93		
Sardine	61.937,27	28.739,98	2.424,50		
Swordfish	208.089,63	197.308,59	323.652,19		
Price (EUR)	2019	2020	2021	Trend	
Mackerel	5,23	5,03	7,03		
Miscellaneous shrimp	42,15	30,27	44,14		
Sardine	0,33	1,02	0,34		
Swordfish	7,72	7,07	7,55		

North Sea

Recently, the National Federation of Fishermen's Organisations (NFFO) met the Governments All Party Parliamentary Group (APPG) to discuss fishing activities around the development of offshore renewables. There is pressure on fishermen to co-exist with the challenges of marine space, protected areas and installations of huge wind farms.¹⁶

Norway¹⁷ announced that it was unilaterally increasing its share of the North East Atlantic mackerel quota for 2021 from 191.843 to 298.299 tonnes, a 55% increase which was also replicated by the Faroe Islands. This has led to concern in the European and UK pelagic sector and will be challenged by the respective organisations.¹⁸

¹⁵ 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.

¹⁶ For more information, visit: <https://www.nffo.org.uk/can-fisheries-co-exist-with-offshore-wind-in-the-race-to-carbon-net-zero/>

¹⁷ The press release from the Norwegian Ministry for trade, industry and fisheries is available at this link:

<https://www.regjeringen.no/en/aktuelt/norway-establishes-a-national-quota-for-northeast-atlantic-mackerel-for-2021/id2853951/>

¹⁸ For more information, visit: <https://fishingnews.co.uk/news/norway-faroe-increase-mackerel-quotas-reckless/>

On 4 June, Norway, Iceland, Liechtenstein, and the United Kingdom agreed in principle a new trade deal, which also concerns the introduction of cutting-edge digital provisions to limit bureaucratic issues.¹⁹

From all sea basins

FAO recently released a new brief on how the COVID-19 crisis has affected the aquatic food systems, starting from the evidence experienced to date, to focus on responses to improve sector's resilience.²⁰

¹⁹ More information about the deal is available at: <https://www.gov.uk/government/news/uk-secures-new-deal-with-norway-iceland-and-liechtenstein>

²⁰ The FAO publication "Aquatic food systems under COVID-19" is available at this link: www.fao.org/publications/card/en/c/CB5398EN

Marine gasoil prices in June 2021

Price of gasoil²¹ in the monitored sea basins remained almost stable between May and June 2021; the largest changes were observed for Celtic Sea and North Sea where gasoil prices fell by 0,4%.

Figure 7 Marine gasoil prices

Sea basin	2021				May-June %
	April	May	June		
Baltic Sea	0,45 €	0,46 €	0,46 €	↓	-0,3%
Bay of Biscay and Iberian coas	0,43 €	0,45 €	0,45 €	↑	0,3%
Celtic Sea	0,40 €	0,42 €	0,42 €	↓	-0,4%
Mediterranean Sea	0,47 €	0,48 €	0,48 €	↑	0,2%
North Sea	0,40 €	0,42 €	0,41 €	↓	-0,4%

²¹ 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: Hake		
PRODUCT	LOCATION	Year
Benguela hake	ES - Cadiz	2019-2020-2021
European hake, gutted, size 2	FR - Les Sables-d'Olonne	2019-2020-2021
	FR - Lorient	2019-2020-2021
European hake, whole, size 1	ES - Burela	2019-2020-2021
	ES - Cillero	2019-2020-2021
European hake, whole, size 2	ES - Burela	2019-2020-2021
	PT - Matosinhos	2019-2020-2021
	PT - Olhão	2019-2020-2021
	PT - Peniche	2019-2021
European hake, whole, size 3	PT - Sesimbra	2019-2020-2021
	ES - Burela	2019-2020-2021
	PT - Matosinhos	2019-2020-2021
	PT - Olhão	2019-2020-2021
	PT - Peniche	2019-2020-2021
	PT - Sesimbra	2019-2020-2021
European hake, whole, size 4	PT - Portimao	2021
	ES - Burela	2019-2020-2021
European hake, whole, size 4	ES - Pasajes	2019-2020-2021

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

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

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

MCS: Sardine		
PRODUCT	LOCATION	Year
European pilchard(=Sardine), whole	ES - Barbate de Franco	2019-2020-2021
	ES - Isla Cristina	2019-2020-2021
Sardine, whole, size 2	PT - Matosinhos	2019-2020-2021
	PT - Peniche	2019-2020-2021
	PT - Portimao	2019-2020-2021
	PT - Sesimbra	2019-2020-2021
Sardine, whole, size 3	PT - Olhão	2019-2020-2021
	PT - Matosinhos	2020-2021
	PT - Portimao	2019-2020-2021
	PT - Sesimbra	2019-2020-2021
	PT - Peniche	2020

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	

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