

# Monthly Highlights

No. 11 / 2021

E U M O F A

European Market Observatory for  
Fisheries and Aquaculture Products

## In this issue

*Among the 10 commodity groups (CGs) recorded in September, “small pelagics” had the highest first sales in both value and volume.*

*From October 2018 to September 2021, the weighted average price at first-sale stage of European sprat in Bulgaria was 0,31 EUR/kg – 21% higher than in Denmark (0,26 EUR/kg), and 80% greater than the price observed in Estonia (0,17 EUR/kg).*

*Since the start of 2021, the price of frozen herrings from Norway showed an upward trend and averaged around 1,00 EUR/kg.*

*Among EU countries, Romanian respondents were the most affected, with 44% saying that their consumption of FAPs had either increased (20%) or decreased (24%) during the COVID-19 pandemic.*

*The EU is the Philippines’ fourth largest trading partner, accounting for 8,4% of the country’s total trade in 2020.*

*In 2018, the average seafood consumption for French respondents was 33,52 kg – 38% higher than the EU average (24,36 kg LWE). In Germany, this figure was 14,50 kg, and in Ireland, it was 23,13 kg.*

*In November, at the end of the 44th annual session, the General Fisheries Commission for the Mediterranean (GFCM) adopted its new 2030 Strategy for the Mediterranean and Black Sea.*



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## 1. First sales in Europe

Between **January** and **September 2021**, 13 EU Member States (MSs), Norway, and the United Kingdom reported first-sales data for 10 commodity groups<sup>1</sup>. 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 EUMOFA<sup>2</sup>, as collected from national administrations.

### 1.1. January–September 2021 compared to the same period in 2020

**Increases in value and volume:** Belgium, Bulgaria, Estonia, France, Lithuania, Portugal, Norway, and the United Kingdom all recorded an increase in both first-sales value and volume. A higher supply of clam and sprat in Bulgaria and of herring and smelt in Lithuania led to the sharp first sales increases in these countries.

**Decreases in value and volume:** Denmark, the Netherlands, Spain, and Sweden recorded decreases. A decrease in the first-sales volume of sandeels is behind the high decline in Denmark, while a decrease in herring is the main reason for the significant decrease in first-sales value in Sweden.

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

Country	January - September 2019		January - September 2020		January - September 2021		Change from January - September 2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	10.045	42,9	8.934	41,6	9.003	47,2	1%	13%
Bulgaria	4.053	2,0	1.906	1,1	3.502	2,2	84%	101%
Cyprus	953	3,6	752	2,7	731	2,9	-3%	7%
Denmark	758.971	389,2	740.213	365,0	579.617	332,5	-22%	-9%
Estonia	41.417	10,9	41.376	11,6	45.721	12,5	10%	8%
France	134.042	454,9	114.886	385,2	118.865	433,4	3%	13%
Italy	71.425	278,8	66.003	244,9	61.759	254,1	-6%	4%
Latvia	39.074	6,5	32.208	6,5	31.083	6,6	-3%	2%
Lithuania	721	0,6	1.396	0,6	1.781	0,9	28%	46%
Netherlands	197.728	296,6	179.081	264,4	150.610	225,9	-16%	-15%
Portugal	97.383	211,7	77.381	177,0	95.047	215,5	23%	22%
Spain	425.593	1235,9	401.430	1089,9	365.045	1.077,1	-9%	-1%
Sweden	141.022	69,4	94.838	58,2	79.050	45,3	-17%	-22%
Norway	2.099.609	1889,3	2.204.122	1814,5	2.248.388	1.985,3	2%	9%
United Kingdom	209.361	438,1	212.870	350,5	226.079	399,0	6%	14%

*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.*

<sup>1</sup> 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.

<sup>2</sup> First-sales data updated on 17.11.2021.

## 1.2. September 2021 compared to September 2020

**Increases in value and volume:** First sales increased in Bulgaria, the Netherlands, Portugal, Sweden, Norway, and the United Kingdom. Red mullet, sprat, and clam were the species responsible for the highest increases in relative terms, in Bulgaria. The sharp increase in Norway was due to particularly high sales of mackerel.

**Decreases in value and volume:** First sales decreased in Estonia, Italy, and Latvia. Latvia recorded the sharpest decreases in relative terms due to decreased sales of sprat and herring.

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

Country	September 2019		September 2020		September 2021		Change from September 2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.263	5,0	1.134	4,9	1.057	6,0	-7%	23%
Bulgaria	379	0,3	163	0,2	320	0,3	97%	97%
Cyprus	31	0,2	26	0,2	31	0,2	20%	0%
Denmark	68.362	44,6	67.977	43,0	65.612	47,1	-3%	9%
Estonia	4.234	1,6	5.316	1,7	5.024	1,4	-5%	-16%
France	14.121	46,9	14.421	47,2	14.078	50,8	-2%	8%
Italy	8.544	26,9	9.107	30,6	8.211	29,1	-10%	-5%
Latvia	3.894	0,6	4.975	1,1	2.154	0,4	-57%	-59%
Lithuania	8	0,0	276	0,1	308	0,1	11%	-3%
Netherlands	31.945	44,0	13.010	26,2	20.923	35,7	61%	36%
Portugal	17.029	25,5	14.181	24,0	17.896	31,4	26%	31%
Spain	40.054	112,9	42.378	107,2	36.098	111,9	-15%	4%
Sweden	4.788	5,5	8.581	7,3	10.826	9,2	26%	26%
Norway	164.848	164,2	139.304	112,3	202.559	201,8	45%	80%
United Kingdom	31.122	52,7	32.836	48,0	35.966	57,0	10%	19%

Possible discrepancies in % changes are due to rounding.

\* Volumes are reported in net weight for EU Member States and the UK, 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.

\*\* Data for September 2021 are temporarily unavailable.

The most recent weekly first-sales data (**up to week 48 of 2021**) are available via the EUMOFA website, and can be accessed [here](#).

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

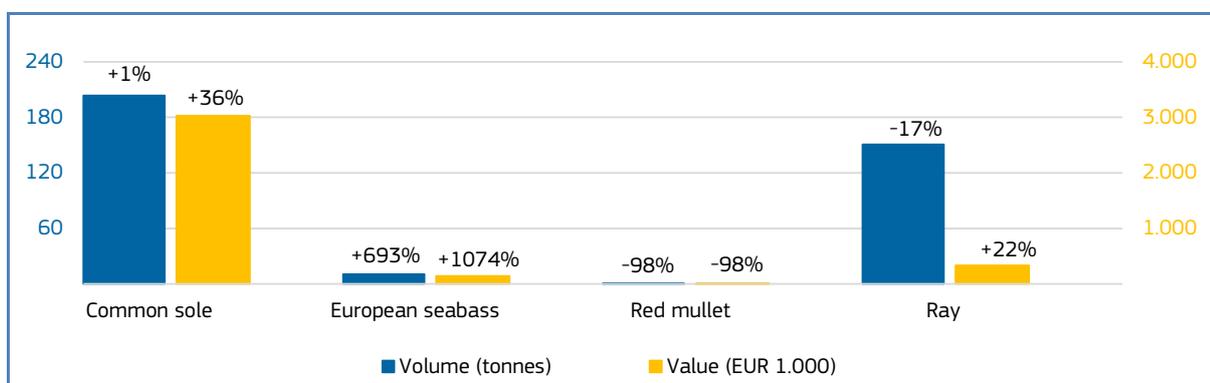
### 1.3. First sales in selected countries

First-sales data analysed in this section are extracted from EUMOFA<sup>3</sup>.

Table 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES<sup>4</sup> IN BELGIUM**

 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 47,2 million, +13%	9.003 tonnes, +1%	Common sole, monkfish, ray, other soles (other than common sole), gurnard.
<b>Sep 2021 vs Sep 2020</b>	EUR 6,0 million, +23%	1.057 tonnes, -7%	<b>Value:</b> common sole, European seabass, monkfish. <b>Volume:</b> red mullet, ray

Figure 1. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM, SEPTEMBER 2021**



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

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

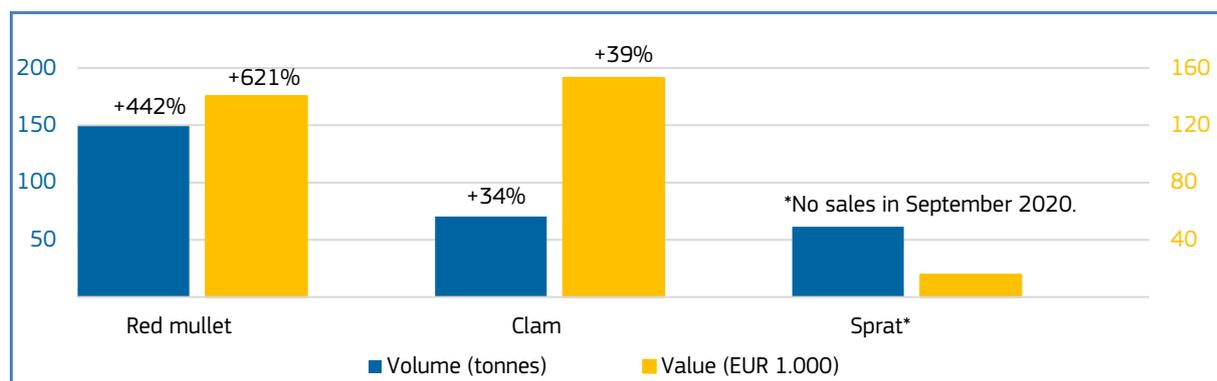
 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 2,2 million, +101%	3.502 tonnes, +84%	Clam, sprat, red mullet.
<b>Sep 2021 vs Sep 2020</b>	EUR 0,3 million, +97%	320 tonnes, +97%	Red mullet, sprat, clam.

<sup>3</sup> First-sales data update on 17.11.2021.

<sup>4</sup> Data on fisheries and aquaculture products harmonised by EUMOFA allow comparisons along the different supply chain stages.



Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA, SEPTEMBER 2021**

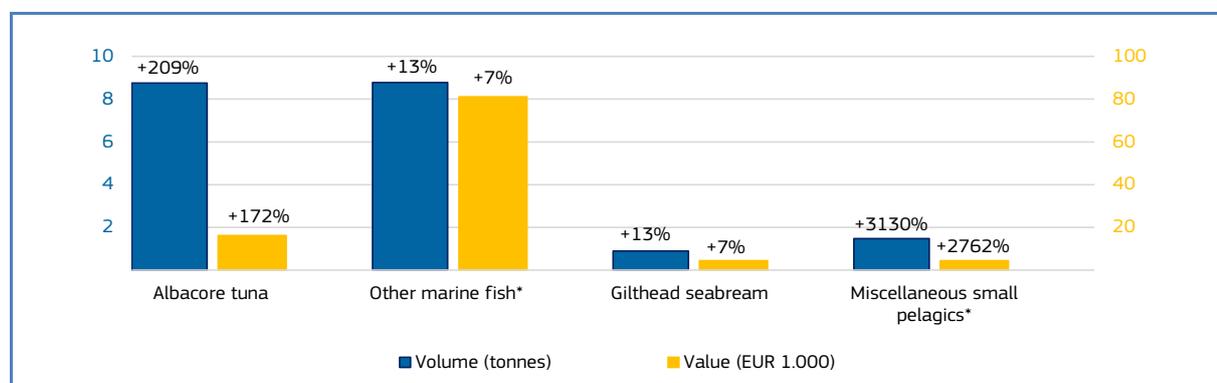


Percentages show change from the previous year.

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

 Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 2,9 million, +7%	731 tonnes, -3%	<b>Value:</b> other marine fish*, other seabreams (other than gilthead seabream)*, picarel, red mullet. <b>Volume:</b> albacore tuna, gilthead seabream, red mullet.
<b>Sep 2021 vs Sep 2020</b>	EUR 0,2 million, 0%	31 tonnes, +20%	Other marine fish (parrotfish, marbled spinefoot, Red Sea goatfish, white grouper, etc.) *, gilthead seabream, miscellaneous small pelagics*.

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS, SEPTEMBER 2021**

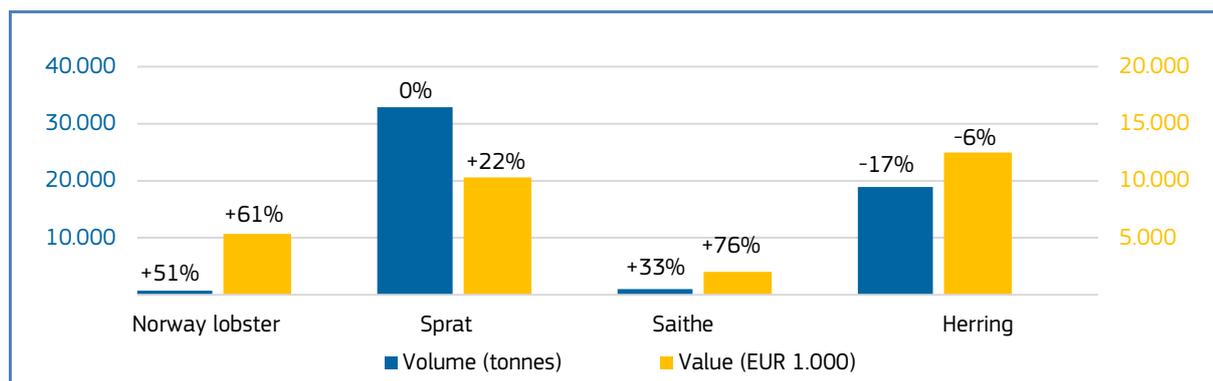


Percentages show change from the previous year. \*EUMOFA aggregation for species.

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

 Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 332,5 million, -9%	579.617 tonnes, -22%	Other groundfish*, sprat, mackerel, cod, European plaice.
<b>Sep 2021 vs Sep 2020</b>	EUR 47,1 million, +9%	65.612 tonnes, -3%	<b>Value:</b> Norway lobster, sprat, saithe. <b>Volume:</b> herring, mussel <i>Mytilus</i> spp.

Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, SEPTEMBER 2021**

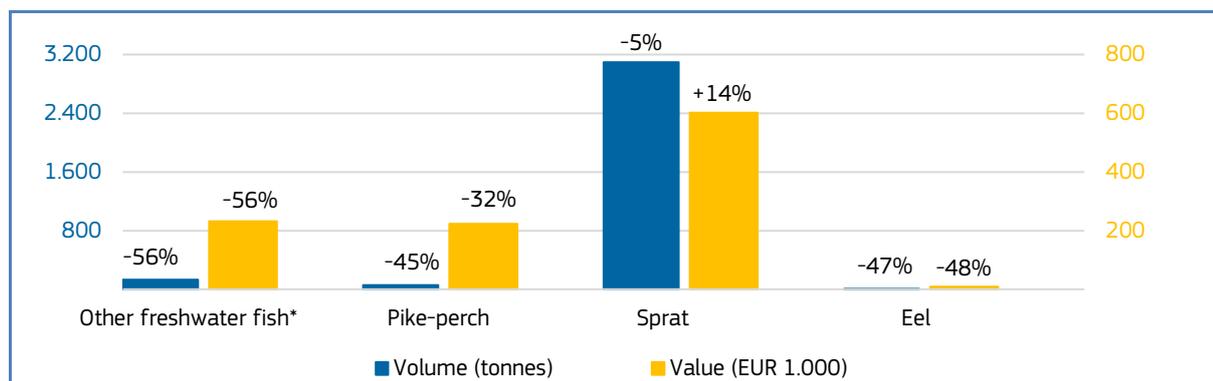


Percentages show change from the previous year. \*EUMOFA aggregation for species

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

 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 12,5 million, +8%	45.721 tonnes, +10%	Sprat, herring.
<b>Sep 2021 vs Sep 2020</b>	EUR 1,4 million, -16%	5.024 tonnes, -5%	Other freshwater fish*, pike-perch, eel. Sprat contributed the most to the decrease in first-sales volume.

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, SEPTEMBER 2021**

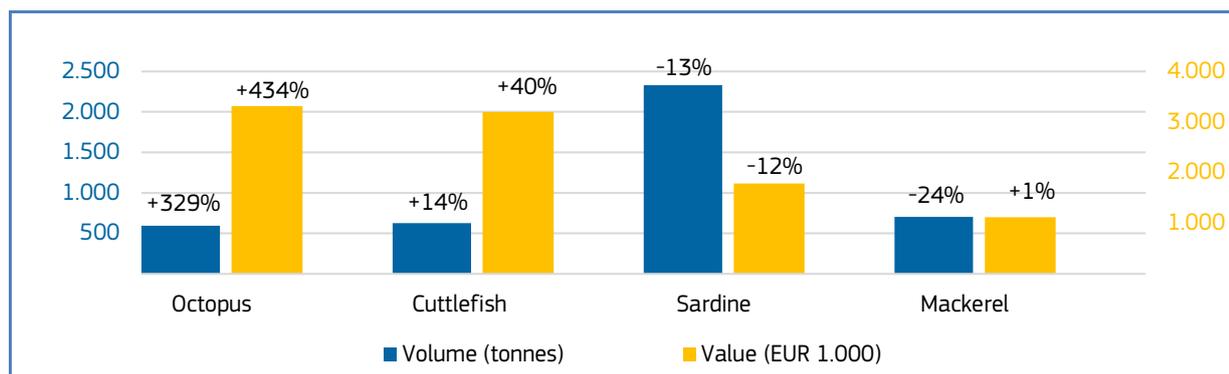


Percentages show change from the previous year. \*EUMOFA aggregation for species

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

 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 433,4 million, +13%	118.865 tonnes, +3%	Norway lobster, scallop, monk, octopus.
<b>Sep 2021 vs Sep 2020</b>	EUR 50,8 million, +8%	14.078 tonnes, -2%	<b>Value:</b> octopus, cuttlefish, monk. <b>Volume:</b> sardine, mackerel.

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, SEPTEMBER 2021**

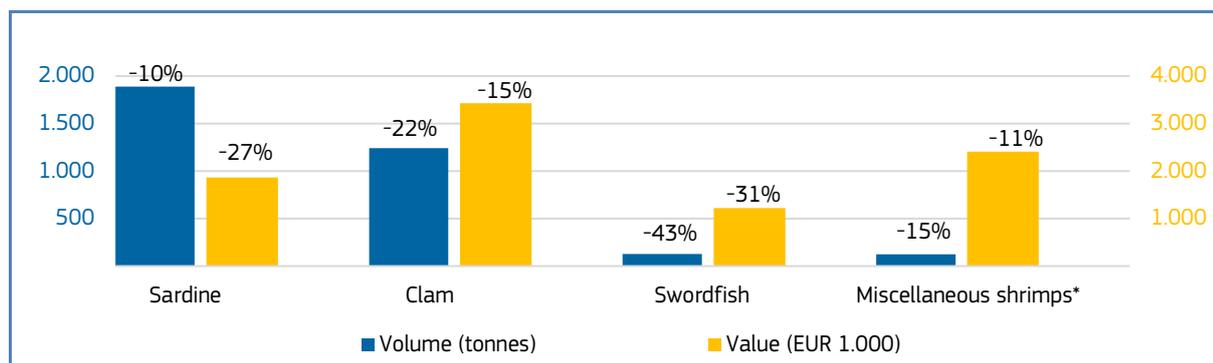


Percentages show change from the previous year.

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

 Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 254,1 million, +4%	61.759 tonnes, -6%	<b>Value:</b> anchovy, miscellaneous shrimps*, red mullet, monkfish. <b>Volume:</b> clam, anchovy, hake, mussel <i>Mytilus</i> spp.
<b>Sep 2021 vs Sep 2020</b>	EUR 29,1 million, -5%	8.211 tonnes, -10%	Sardine, clam, swordfish, miscellaneous shrimps.

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, SEPTEMBER 2021**

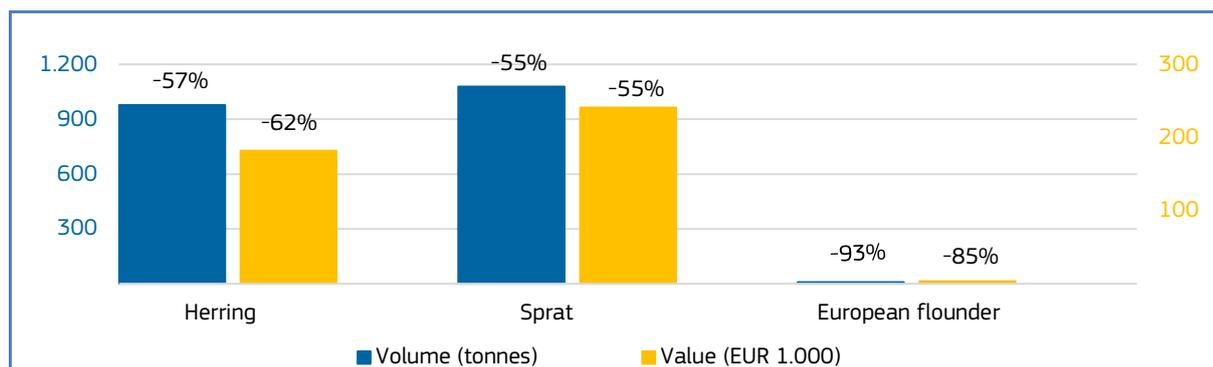


Percentages show change from the previous year. \*EUMOFA aggregation for species.

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

 Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 6,6 million, +2%	31.083 tonnes, -3%	<b>Value:</b> Herring, other freshwater fish*, other marine fish*. <b>Volume:</b> sprat, smelt, European flounder.
<b>Sep 2021 vs Sep 2020</b>	EUR 0,4 million, -59%	2.154 tonnes, -57%	Herring, sprat, European flounder.

Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, SEPTEMBER 2021**

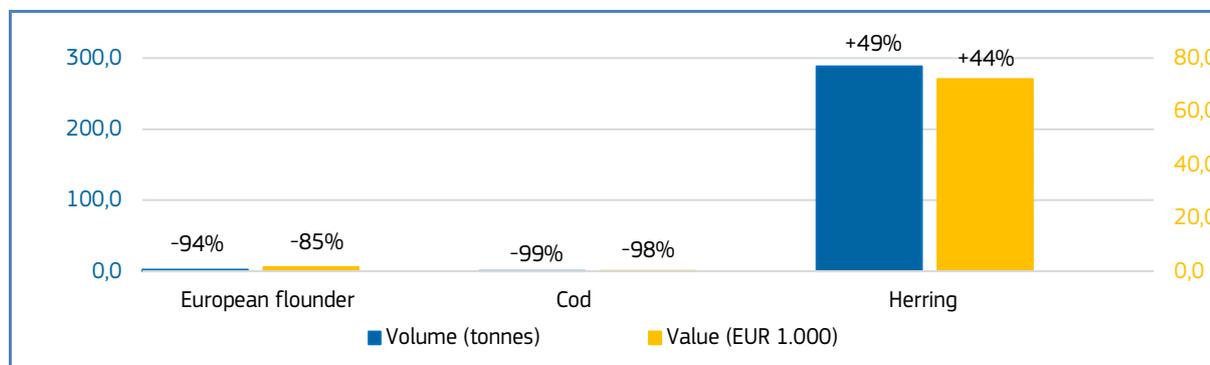


Percentages show change from the previous year. \*EUMOFA aggregation for species.

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Sep 2021 vs Jan-Sep 2020	EUR 0,9 million, +46%	1.781 tonnes, +28%	Smelt, herring, other groundfish*.
Sep 2021 vs Sep 2020	EUR 0,1 million, -3%	308 tonnes, +11%	<b>Value:</b> European flounder, cod, sprat. <b>Volume:</b> herring.

Figure 9. **FIRST-SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, SEPTEMBER 2021**



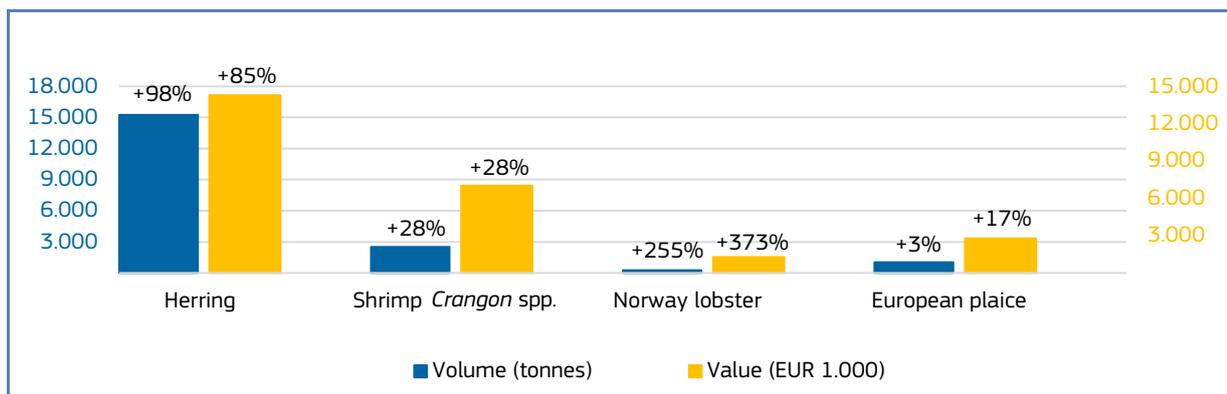
Percentages show change from the previous year. \*EUMOFA aggregation for species.



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

 The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 225,9 million, -15%	150.610 tonnes, -16%	Herring, mackerel, blue whiting, common sole, European plaice.	In September 2021, <b>herring</b> recorded a significant increase in first sales compared to September 2020. In general, herring catches occur mostly between August and September, but the 2020 fishing season started earlier - in June - mostly due to resource availability and fishing strategies. In terms of first-sales volume of herring, 7.700 tonnes in September 2020 appears to be an exception compared to the same month in other years – with 27.000 tonnes recorded in September 2019, 28.900 tonnes in 2018, and 24.500 tonnes in 2017. The increase observed in September 2021 can be considered as a return to normal conditions, in the context of good stock status and Total Allowable Catches (TAC). An increase in first sales of <b>Norway lobster</b> in September 2021 could be explained by low sales in 2020 in the context of Brexit and the Covid crisis.
<b>Sep 2021 vs Sep 2020</b>	EUR 35,7 million, +36%	20.923 tonnes, +61%	Herring, shrimp <i>Crangon</i> spp., Norway lobster, European plaice.	

Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, SEPTEMBER 2021**



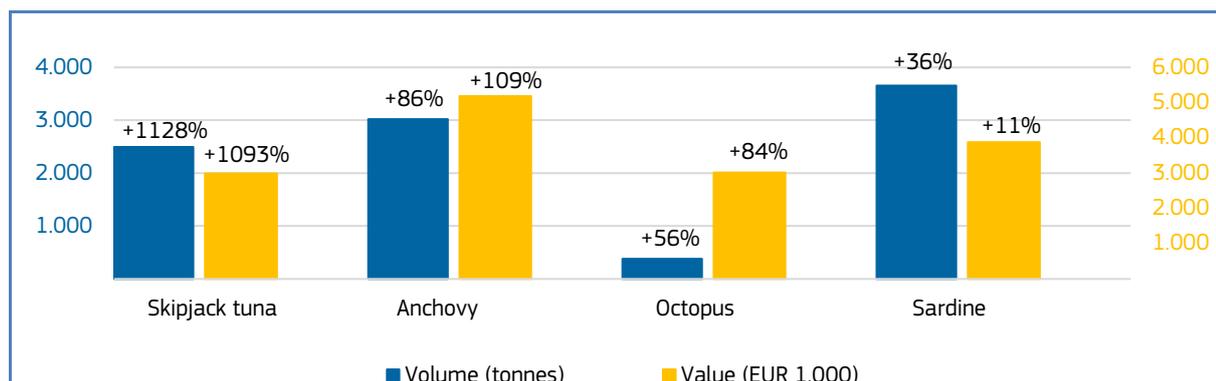
Percentages show change from the previous year.

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

 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 215,5 million, +22%	95.047 tonnes, +23%	Octopus, anchovy, skipjack tuna, Atlantic horse mackerel, sardine.	Skipjack tuna recorded high first sales in September 2021 compared to September 2020. The volume of catches was particularly low in 2020 (around 70% lower than the average for 2015-2019), explaining the abrupt increase in September 2021. The natural “boom and bust” <sup>5</sup> cycle of this species seems to offer an explanation, given that other potential factors are not currently observed (in terms of fishing effort, market drivers, or management).
<b>Sep 2021 vs Sep 2020</b>	EUR 31,4 million, +31%	17.897 tonnes, +26%	Skipjack tuna, anchovy, octopus, sardine.	

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, SEPTEMBER 2021**

<sup>5</sup> Phenomenon in which a population grows and shrinks in size on a regular basis.

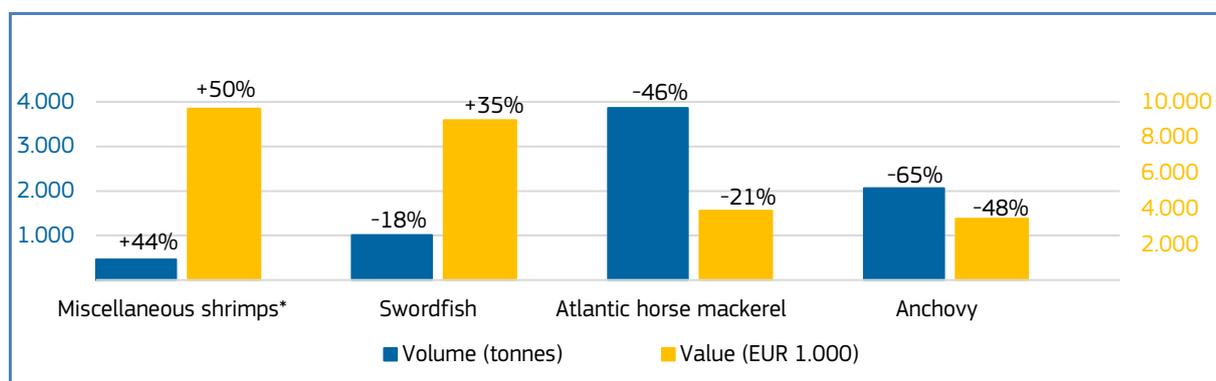


Percentages show change from the previous year.

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

 Spain	First-sales value / trend in %	First-sales volume / trend in %	Main contributing species
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 1,08 billion, -1%	365.045 tonnes, -9%	Squid, cod, hake, mackerel, Atlantic horse mackerel.
<b>Sep 2021 vs Sep 2020</b>	EUR 111,9 million, +4%	36.098 tonnes, -15%	<b>Value:</b> miscellaneous shrimps*, swordfish, hake, bigeye tuna. <b>Volume:</b> anchovy, Atlantic horse mackerel, mackerel.

Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, SEPTEMBER 2021**

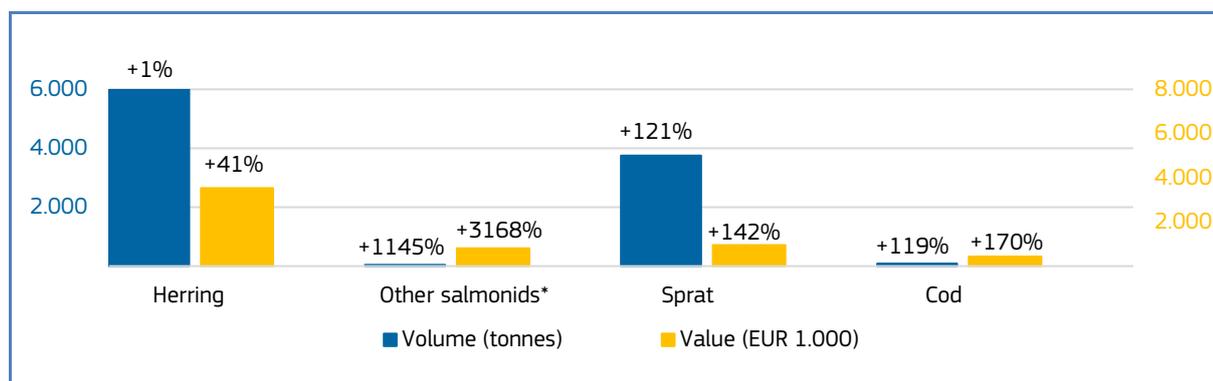


Percentages show change from the previous year. \*EUMOFA aggregation for species

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

 Sweden	First-sales value / trend in %	First-sales volume / trend in %	Main contributing species
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 45,3 million, -22%	79.050 tonnes, -17%	Coldwater shrimp, herring, sprat, Norway lobster, other groundfish*.
<b>Sep 2021 vs Sep 2020</b>	EUR 9,2 million, +26%	10.826 tonnes, +26%	Herring, other salmonids*; sprat, cod.

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, SEPTEMBER 2021**

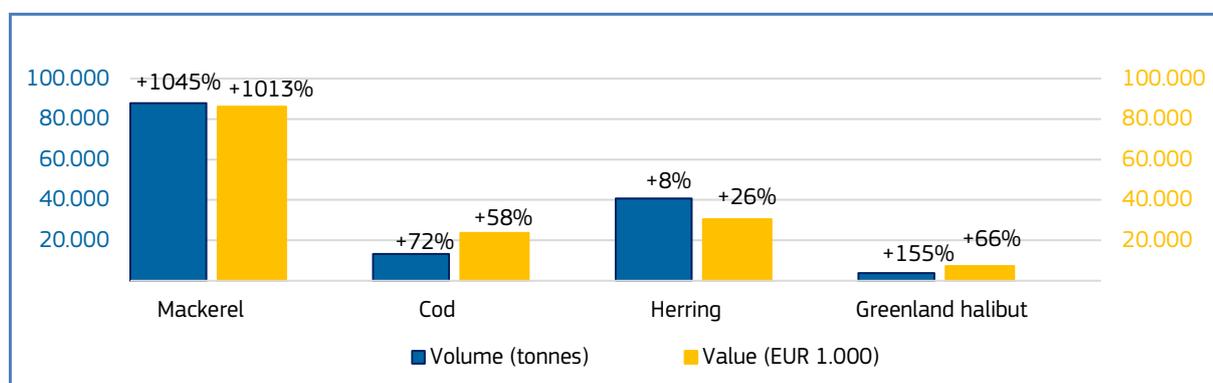


Percentages show change from the previous year. \*EUMOFA aggregation for species

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

 Norway	First-sales value / trend %	First-sales volume <sup>6</sup> / trend %	Main contributing species
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 1,99 billion, +9%	2,25 million tonnes, -2%	Mackerel, miscellaneous small pelagics*, crab, herring, cod.
<b>Sep 2021 vs Sep 2020</b>	EUR 201,8 million +80%	202.559 tonnes, +45%	Mackerel, herring, cod, Greenland halibut.

Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, SEPTEMBER 2021**



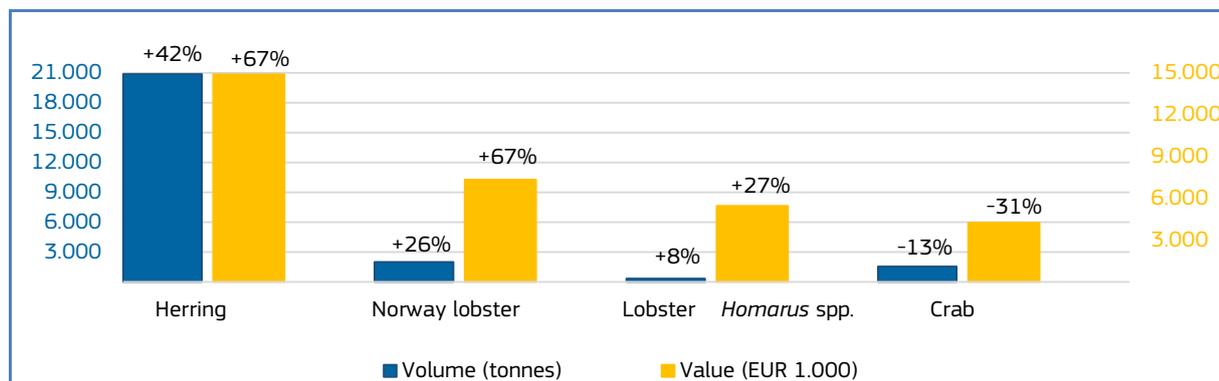
Percentages show change from the previous year. \*EUMOFA aggregation for species

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
<b>Jan-Sep 2021 vs Jan-Sep 2020</b>	EUR 399 million, +14%	226.079 tonnes, +6%	Norway lobster, lobster <i>Homarus</i> spp., herring, blue whiting.
<b>Sep 2021 vs Sep 2020</b>	EUR 57 million, +19%	35.966 tonnes, +10%	Herring, Norway lobster, lobster <i>Homarus</i> spp., crab.

<sup>6</sup> Volume reported in live weight equivalent (LWE)

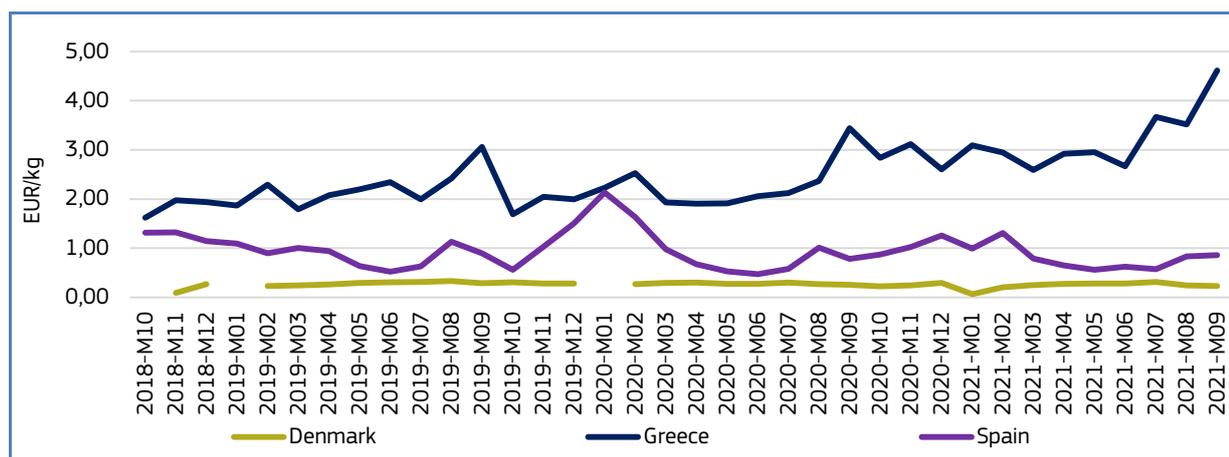
Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, SEPTEMBER 2021**



Percentages show change from the previous year.

#### 1.4. Comparison of first-sales prices of selected species in selected countries<sup>7</sup>

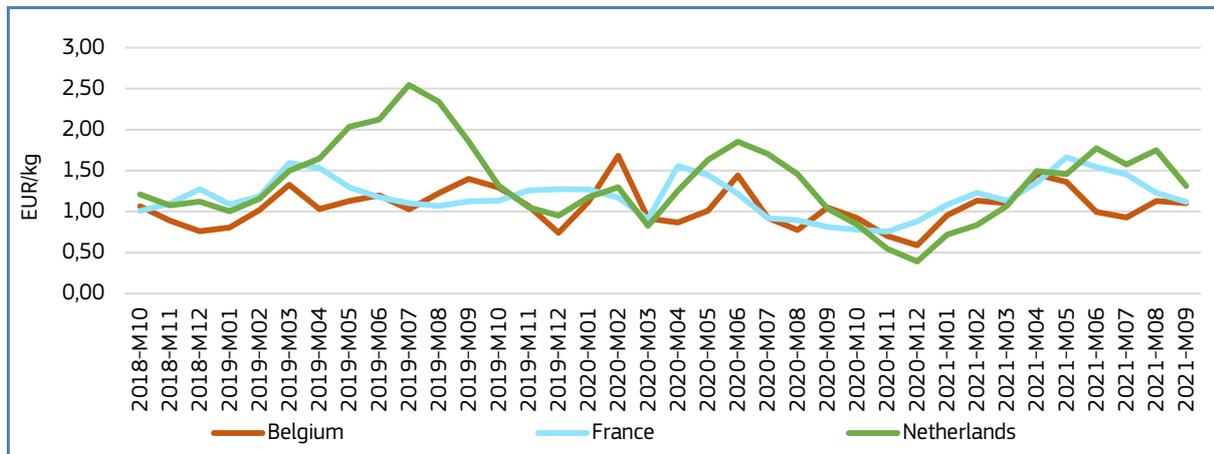
Figure 16. **FIRST-SALES PRICES OF BLUE WHITING IN DENMARK, GREECE, AND SPAIN**



EU first sales of **blue whiting** are reported for several countries, including **Denmark**, **Greece**, and **Spain**. In September 2021, the average first-sales prices of blue whiting were: 0,23 EUR/kg in Denmark (down from both the previous month and year, by 4% and 8%, respectively); 4,61 EUR/kg for Greece (up from August 2021 by 31%, and from September 2020 by 34%); and 0,86 EUR/kg in Spain (up from the previous month by 4%, and up from the previous year by 10%). In September 2021, supply increased in both Denmark and Spain (+1116%, and +10% respectively), and decreased in Greece (82%), relative to the previous year. Volumes sold in the three markets exhibit a clear seasonality, with peak season occurring from March–April in Denmark, January–March in Greece, and May–July in Spain. Over the past 36 months, blue whiting prices showed an upward trend in Greece, and a stable trend in Denmark and Spain. At the same time, supply showed a downward trend in Denmark and Spain, and the opposite in Greece.

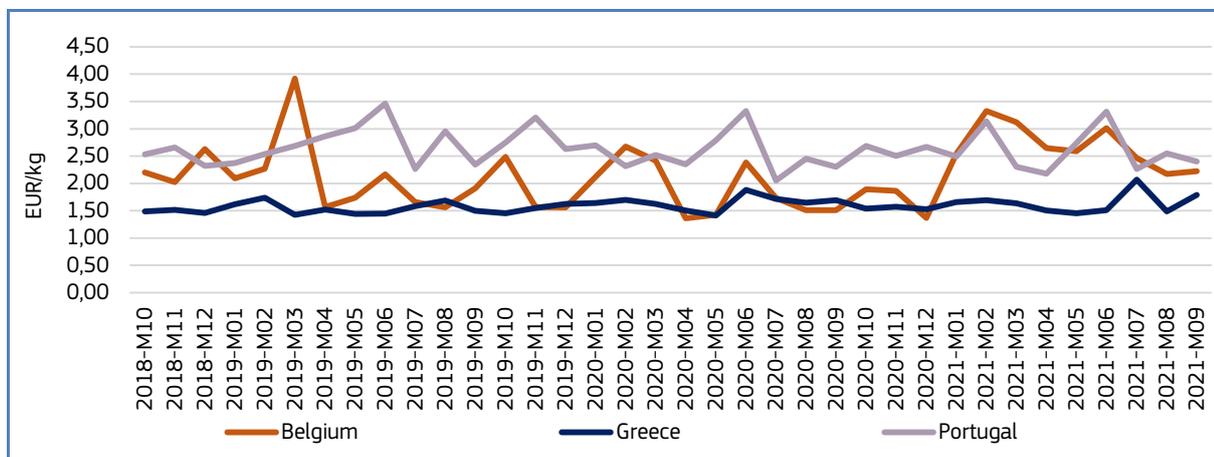
<sup>7</sup> First-sales data updated on 17.11.2021.

Figure 17. **FIRST-SALES PRICES OF GURNARD IN BELGIUM, FRANCE, AND THE NETHERLANDS**



EU first sales of **gurnard** occur predominantly in **Belgium, France, and the Netherlands**. In September 2021, the average first-sales prices of gurnard were: 1,10 EUR/kg in Belgium (down from the previous month by 2%, and up from the previous year by 5%); 1,12 EUR/kg in France (down from August 2021 by 9%, and up from September 2020 by 37%); and 1,31 EUR/kg in the Netherlands (down from the previous month by 25%, and up from the previous year by 26%). In September 2021, supply decreased in all three markets: -20% in Belgium, -9% in France, and -23% in the Netherlands, relative to the previous year. Supply is seasonal with different peaks in all three markets: January–March in Belgium, August/September–October/November in France, and May–October in the Netherlands. Over the 36-month period observed, gurnard prices exhibited an upward trend in all three countries. During the same period, supply showed an increasing trend in the Netherlands, and the opposite trend in Belgium and France.

Figure 18. **FIRST-SALES PRICES OF RAY IN BELGIUM, GREECE, AND PORTUGAL**

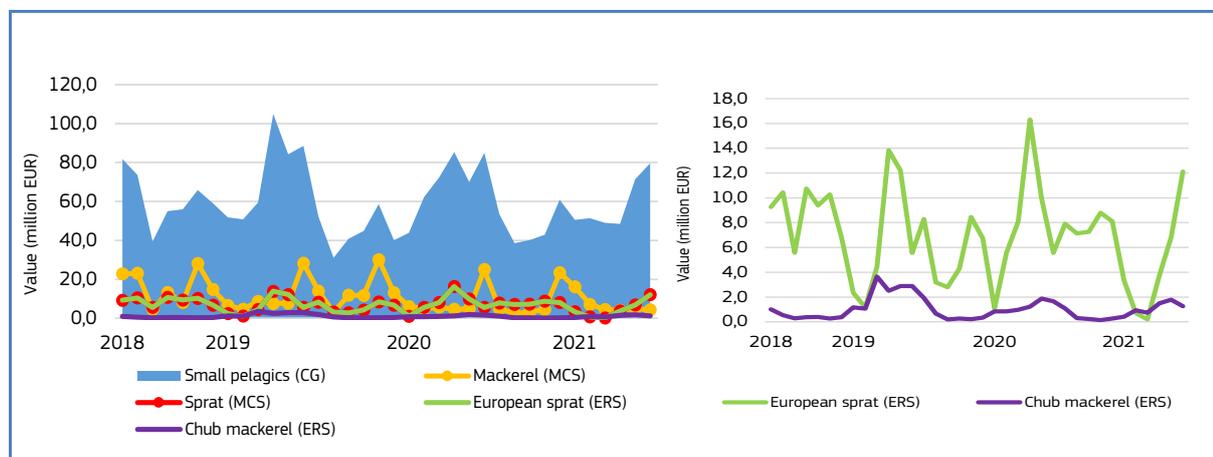


EU first sales of **ray** were recorded for many countries, including **Belgium, Greece, and Portugal**. In September 2021, the average first-sales prices of ray were: 2,22 EUR/kg in Belgium (up from both the previous month and year by 2% and 47%, respectively); 1,79 EUR/kg in Greece (up from August 2021 by 21%, and up from September 2020 by 6%); and 2,40 EUR/kg in Portugal (down from the previous month by 6%, and up from the previous year by 4%). In September 2021, supply decreased in both Belgium and Portugal (-17% and -5% respectively) and increased in Greece by 58%, relative to the previous year.

Volumes sold in the three markets peak seasonally: September–October in Belgium; March–April and October–November in Greece; and January–March and August–September in Portugal. Over the past three years, prices have exhibited an upward trend in Belgium and Greece, and the opposite in Portugal. At the same time, supply went down in Greece, but showed an upward trend in Belgium and Portugal.

## 1.5. Commodity group of the month: Small pelagics<sup>8</sup>

Figure 19. **FIRST SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES<sup>9</sup>, OCTOBER 2018 – SEPTEMBER 2021**



The “small pelagics” commodity group (CG<sup>10</sup>) recorded the highest first sales in value and volume of the 10 CGs recorded in September 2021<sup>11</sup>. Across the reporting countries covered by the EUMOFA database, first sales of small pelagics reached a value of EUR 79,6 million and a volume of 116.009 tonnes, representing a value increase of 14% and a volume decrease of 1% compared to September 2020. In the past 36 months, the highest first-sales value of small pelagics was recorded at EUR 104,9 million in August 2019, while the lowest was at EUR 31,1 million in December 2019.

The small pelagics commodity group includes eight Main Commercial Species (MCS): anchovy, herring, Atlantic horse mackerel, other horse mackerel, mackerel, miscellaneous small pelagics\*, pilchard/sardine, and sprat.

At the Electronic Recording and Reporting System (ERS) level, chub mackerel (2%) and European sprat (15%) together accounted for 17% of “small pelagics” total first-sales value recorded in September 2021.

## 1.6. Focus on chub mackerel



The chub mackerel (*Scomber japonicus*) is a coastal pelagic (mid-water) species of fish in the tuna and mackerel family, Scombridae. In Europe, this species is found around the Atlantic coasts of France, Spain, and Portugal, with their distribution continuing along the western coast of Africa. The chub mackerel’s range extends throughout the Mediterranean and the species is also found in the southern Black Sea<sup>12</sup>. It is generally found within 20 miles off the coast. It tends to school with other pelagic species, as well as other types of mackerels and sardines. Spawning most often occurs in water temperatures of 15° to 20°C, from March to October. Peak spawning is between April and August.

Chub mackerel is mainly caught as bycatch in purse seine fisheries. Gear types deployed include trawlers, pole and line, and gillnets<sup>13</sup> in artisanal fisheries. There is no specific EU management in place for this species, and it is mainly affected by measures targeting other small pelagic species, such as sardine and anchovy. Chub mackerel is sold fresh, frozen, smoked, salted, and occasionally canned<sup>14</sup>.

<sup>8</sup> First-sales data updated on 19.11.2021.

<sup>9</sup> Norway and the UK excluded from the analyses.

<sup>10</sup> Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

<sup>12</sup> <https://britishseafishing.co.uk/spanish-mackerel/>

<sup>13</sup> <https://www.fao.org/3/y2668b/y2668b07.htm>

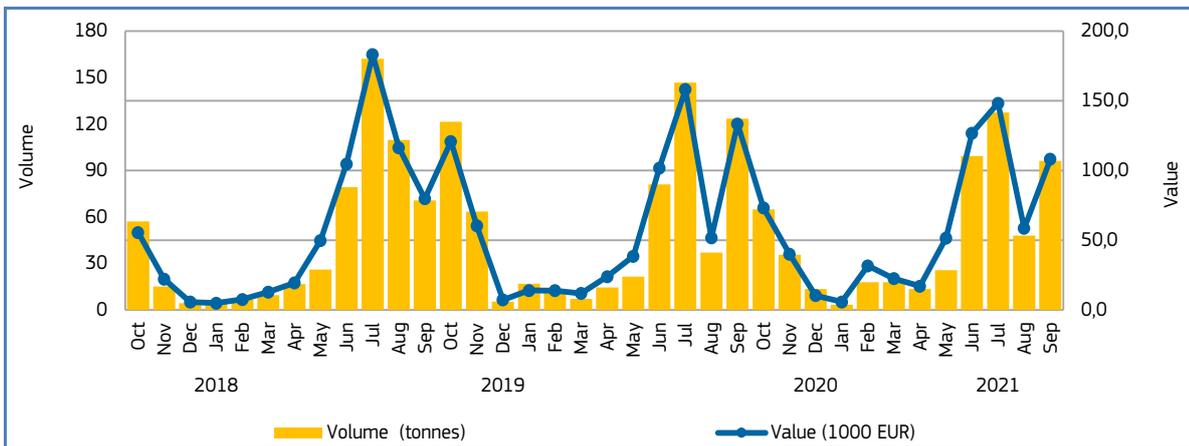
<sup>14</sup> <https://www.fishbase.se/summary/117>

## Selected countries

Table 18. **COMPARISON OF CHUB MACKEREL FIRST SALES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "SMALL PELAGICS" IN SELECTED COUNTRIES**

Chub mackerel		Changes in chub mackerel first sales Jan-Sep 2021 (%)		Contribution of chub mackerel to total "small pelagics" first sales in Sep 2021 (%)	Main places of sale in Jan-Sept 2021 in terms of first-sales value
		Compared to Jan-Sep 2020	Compared to Jan-Sep 2019		
Italy	Value	+4%	-1%	2%	Piombino, Pescara, San Benedetto del Tronto.
	Volume	-2%	-7%	3%	
Portugal	Value	+10%	-44%	9%	Sesimbra, Peniche, Olhão.
	Volume	0%	-45%	24%	
Spain	Value	-29%	-72%	0,3%	Barcelona, Arenys de Mar, Marin – Pontevedra.
	Volume	-47%	-81%	0,3%	

Figure 20. **CHUB MACKEREL: FIRST SALES IN ITALY, OCTOBER 2018 - SEPTEMBER 2021**



In Italy, over the past 3 years (October 2018 - September 2021), the first-sales volume of chub mackerel peaked in July, ranging from 127 to 162 tonnes. Typically, first sales are the highest in the summer when the chub mackerel fishery is at its peak.

Figure 21. **FIRST SALES: COMPOSITION OF "SMALL PELAGICS" (ERS LEVEL) IN ITALY, IN VALUE AND VOLUME, SEPTEMBER 2021**

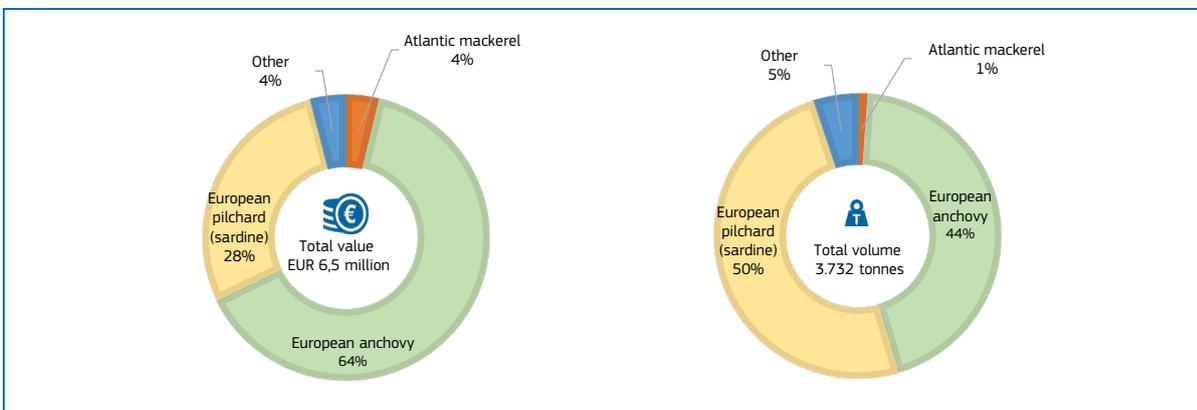
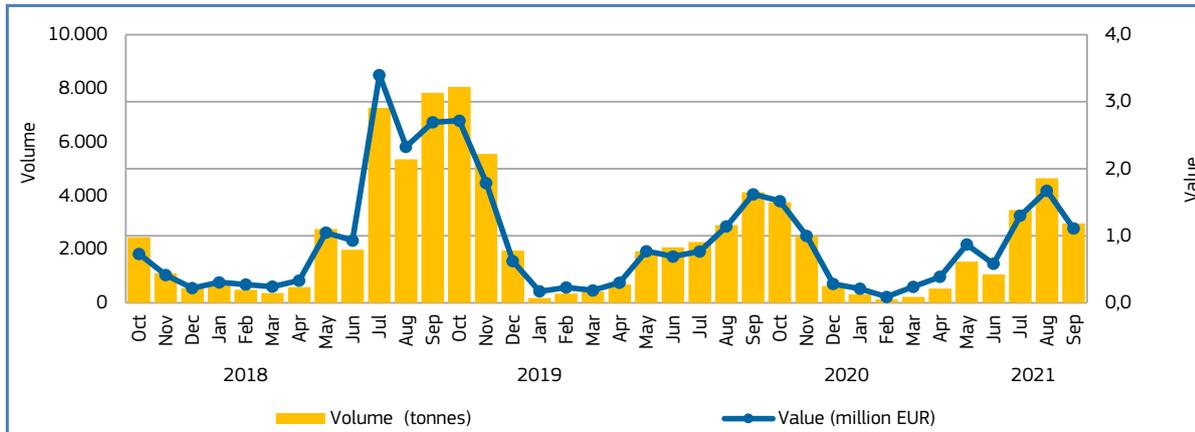


Figure 22. **CHUB MACKEREL: FIRST SALES IN PORTUGAL, OCTOBER 2018 - SEPTEMBER 2021**



In **Portugal**, from October 2018 to September 2021, the highest first-sales volume of common chub mackerel was observed in 2019, peaking in September and October when 8.057 tonnes and 7.838 tonnes were sold, respectively. The chub mackerel fishery is less active in the winter due to adverse weather conditions and seasonality in the fishery. The main fishing season has occurred between May and September in each of the past three years.

Figure 23. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN PORTUGAL, IN VALUE AND VOLUME, SEPTEMBER 2021**

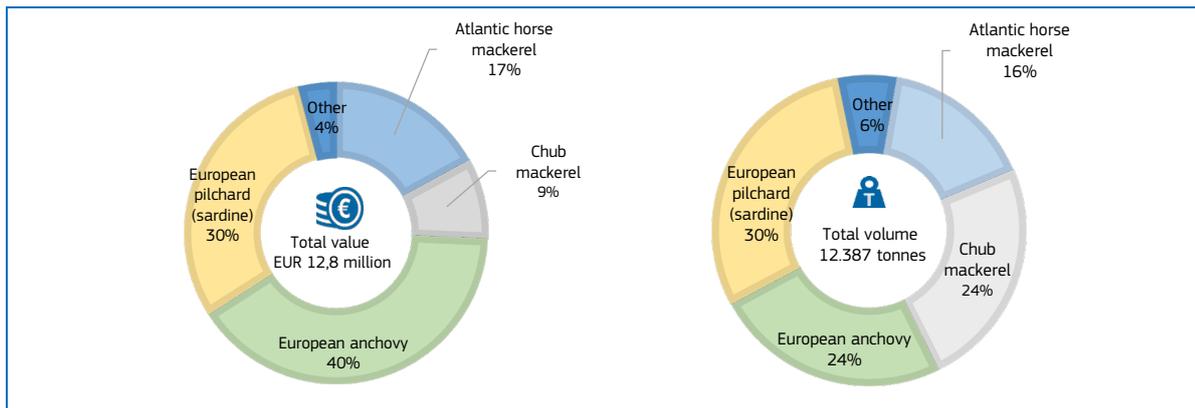
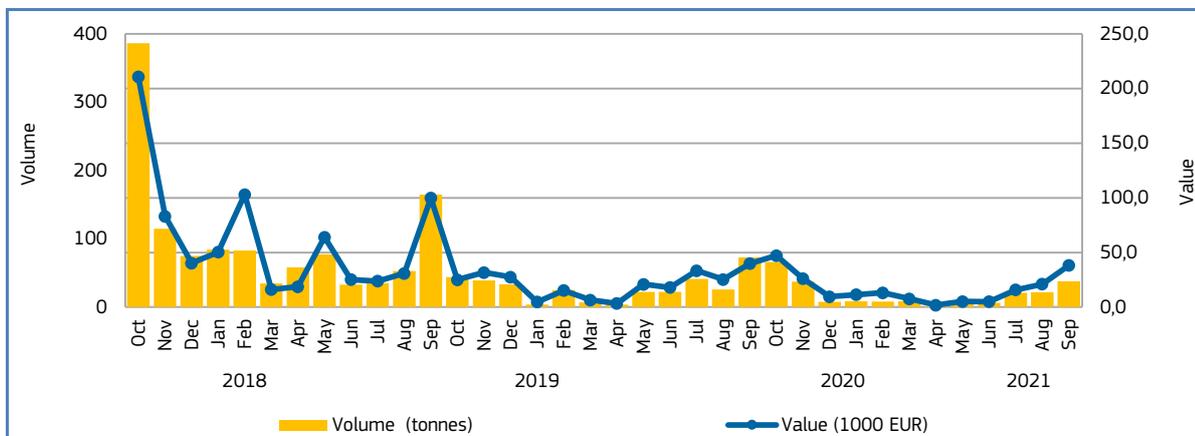


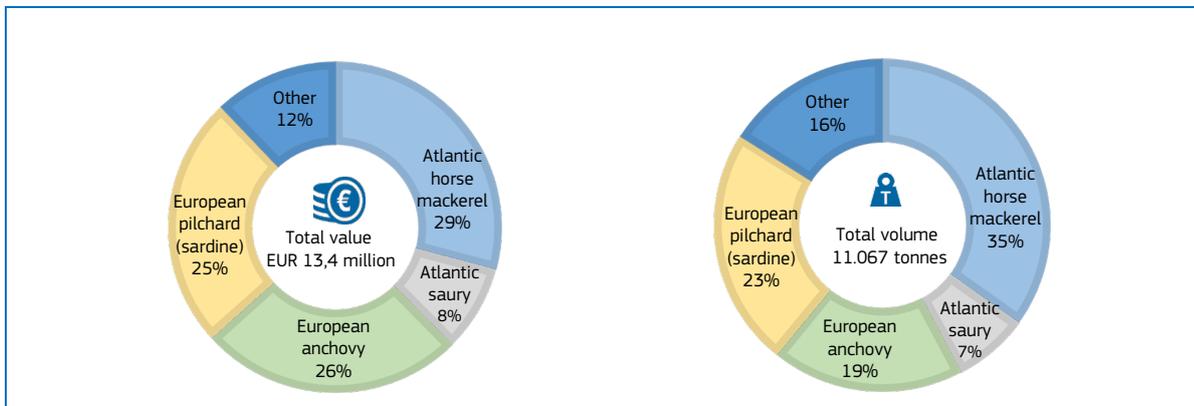
Figure 24. **CHUB MACKEREL: FIRST SALES IN SPAIN, OCTOBER 2018 - SEPTEMBER 2021**



Over the last 36 months (October 2018 - September 2021), the highest first-sales volume of chub mackerel in **Spain** occurred in October 2018, when 386 tonnes were sold. Since then, first sales have been significantly lower, with spikes in September 2019 (165 tonnes) and November 2018 (115 tonnes).

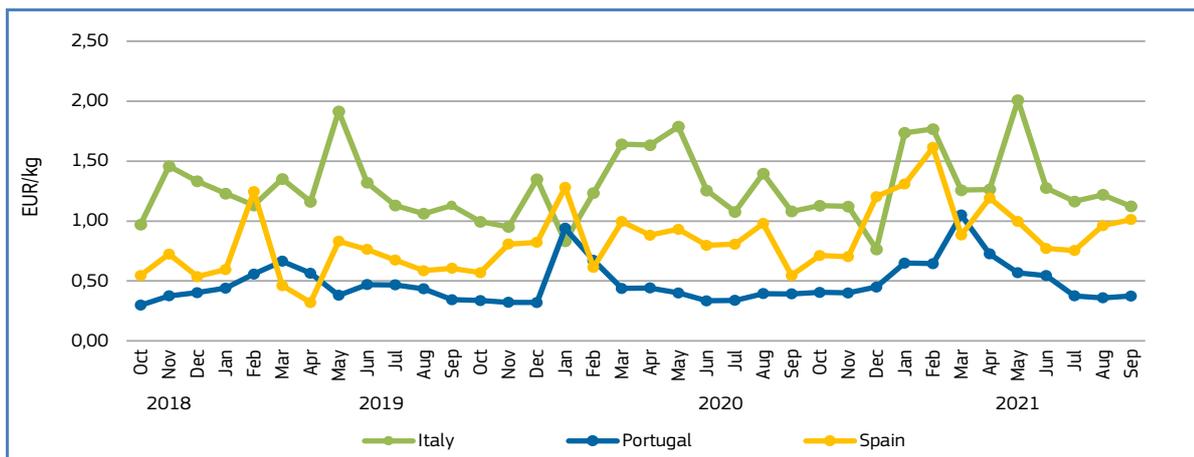


Figure 25. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN SPAIN, IN VALUE AND VOLUME, SEPTEMBER 2021**



## Price trend

Figure 26. **CHUB MACKEREL: FIRST-SALES PRICES IN SELECTED COUNTRIES, OCTOBER 2018 - SEPTEMBER 2021**



Over the 36-month observation period (October 2018 to September 2021), the weighted average first-sales price of chub mackerel in **Italy** was 1,18 EUR/kg, 197% higher than in **Portugal** (0,40 EUR/kg), and 71% greater than that of **Spain** (0,69 EUR/kg). The lowest average first-sales prices in Portugal are linked with the highest annual first-sales volumes among the surveyed countries.

In **Italy**, in September 2021, the average first-sales price of chub mackerel (1,12 EUR/kg) increased by 4% compared with September 2020 and decreased by 1% compared with September 2019. Over the past 36 months, the average price ranged from 0,76 EUR/kg for 14 tonnes in December 2020, to 2,01 EUR/kg for 26 tonnes in May 2021.

In **Portugal**, in September 2021, the average first-sales price of chub mackerel (0,37 EUR/kg) decreased by 5% and increased by 9% compared to the same months in 2020 and 2019, respectively. During the observed period, the lowest average price (0,30 EUR/kg for 2.451 tonnes) was seen in October 2018, while the highest average price was recorded in March 2021, at 1,05 EUR/kg for 230 tonnes.

In **Spain**, in September 2021, the average first-sales price of chub mackerel (1,01 EUR/kg) increased by 85% compared to September 2020 and by 67% compared to September 2019. During the observed period, the lowest average price of 0,32 EUR/kg for 58 tonnes was seen in April 2019, while the highest average price was recorded in February 2021, at 1,61 EUR/kg for 8 tonnes.

## 1.7. Focus on European sprat



Source: Scandinavian Fishing Yearbook

European sprat (*Sprattus sprattus*) is a pelagic marine species that resides in schools in inshore areas. It is a short-lived species with a tolerance for low-salinity waters, and it feeds on zooplankton. Sprat migrates to spawning grounds in spring and summer and moves to the surface at night. Some spawning may take place throughout the year, near the coast or up to 100 km from the shore<sup>15</sup>.

Sprat is distributed in the Northeast Atlantic (from the North Sea and Baltic Sea, down to North Africa), the Mediterranean, and the Black Sea<sup>16</sup>. The species is important in North Sea and Baltic Sea fisheries, where it is caught in a mixed fishery with herring, and acts as a prey species for cod. Catches are made by pelagic trawlers using small-meshed nets.

Sprat is managed through a multiannual plan<sup>17</sup> on which basis it is subject to total allowable catches (TACs) agreed annually, which are shared among Member States. Total allowable catches for sprat in the Baltic Sea were set at 251.943 tonnes for 2022<sup>18</sup>.

On the commercial market, sprat is mainly found canned and smoked for human consumption, but it is also used in the production of fishmeal and fish oil for non-human consumption.

### Selected countries

Table 19. **COMPARISON OF EUROPEAN SPRAT FIRST SALES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF SMALL PELAGICS IN SELECTED COUNTRIES**

European sprat		Changes in European sprat first sales Jan-Sep2021 (%)		Contribution of European sprat to total "small pelagics" first sales in Sep 2021 (%)	Main places of sales in Jan-Sept 2021 in terms of first-sales value
		Compared to Jan-Sep 2020	Compared to Jan-Sep 2019		
Bulgaria	Value	+239%	-3%	100%	Nessebar, Sozopol, Aheloy, Balchik, Varna.
	Volume	+192%	0%	100%	
Denmark	Value	-23%	-28%	45%	Thyborøn, Skagen, Hanstholm.
	Volume	-26%	-33%	63%	
Estonia	Value	+44%	+44%	64%	Lemmetsa, Haapsalu, Liu Kalatsehh.
	Volume	+26%	+24%	64%	

We have covered **European sprat** in previous *Monthly Highlights*:

**First sales:** MH 11/2020 (Poland, the Netherlands, Sweden), MH 9/2018 (Estonia, Latvia, Sweden), MH 4/2017 (Estonia, Latvia, Sweden), MH 5/2016 (Latvia), MH 5/2015 (Latvia); MH 3/2015 (Sweden), MH 5/2014 (Latvia) MH February/2013 (Sweden).

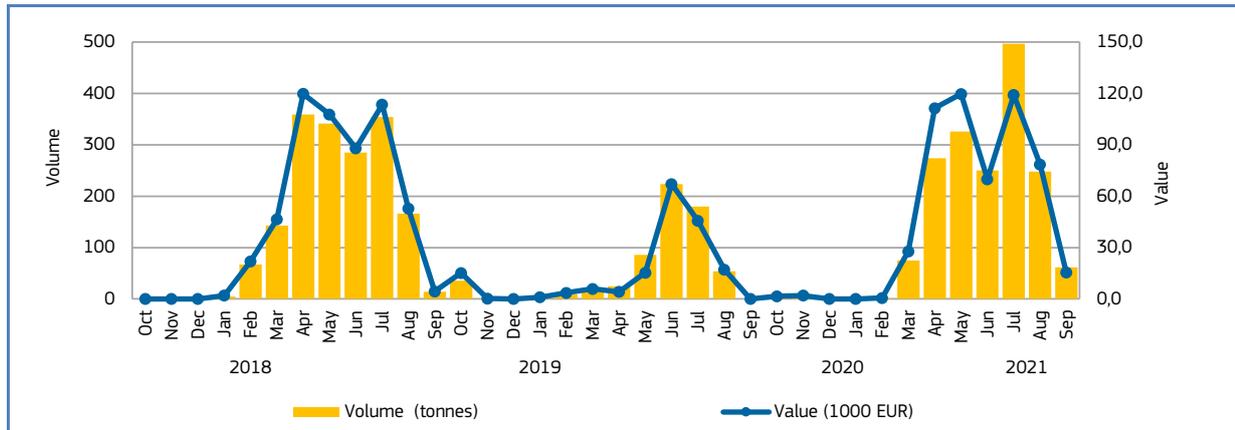
<sup>15</sup> <http://www.fao.org/fishery/species/2102/en>

<sup>16</sup> [https://mare.istc.cnr.it/fisheriesv2/species\\_en?sn=34462](https://mare.istc.cnr.it/fisheriesv2/species_en?sn=34462)

<sup>17</sup> **Regulation (EU) 2016/1139** <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32016R1139>

<sup>18</sup> **Council Regulation (EU) 2021/1888** <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32021R1888>

Figure 27. **EUROPEAN SPRAT: FIRST SALES IN BULGARIA, OCTOBER 2018 - APRIL 2021**

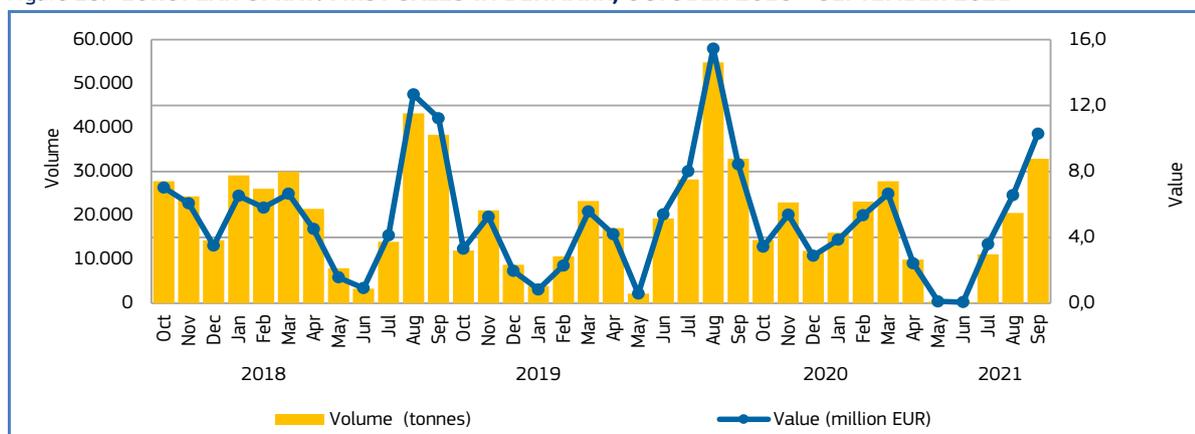


In **Bulgaria**, over the observed 36-month period (October 2018-September 2021), the highest first sales of European sprat were observed in July 2021 and April 2019, when 497 and 359 tonnes were sold, respectively. First sales occurred mostly when sea temperatures were highest, in the spring and summer, which is the main fishing season.

Figure 28. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN BULGARIA, IN VALUE AND VOLUME, SEPTEMBER 2021**



Figure 29. **EUROPEAN SPRAT: FIRST SALES IN DENMARK, OCTOBER 2018 - SEPTEMBER 2021**



In **Denmark**, over the past 36 months (October 2018-September 2021), the highest first sales of European sprat were registered in the warmest period of the year, peaking in August 2020 and 2019, when 54.829 tonnes and 43.221 were sold, respectively. In general, first sales of European sprat occur throughout the year, but the highest sales occur during the summer period, mainly in August and September.

Figure 30. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN DENMARK, IN VALUE AND VOLUME, SEPTEMBER 2021**

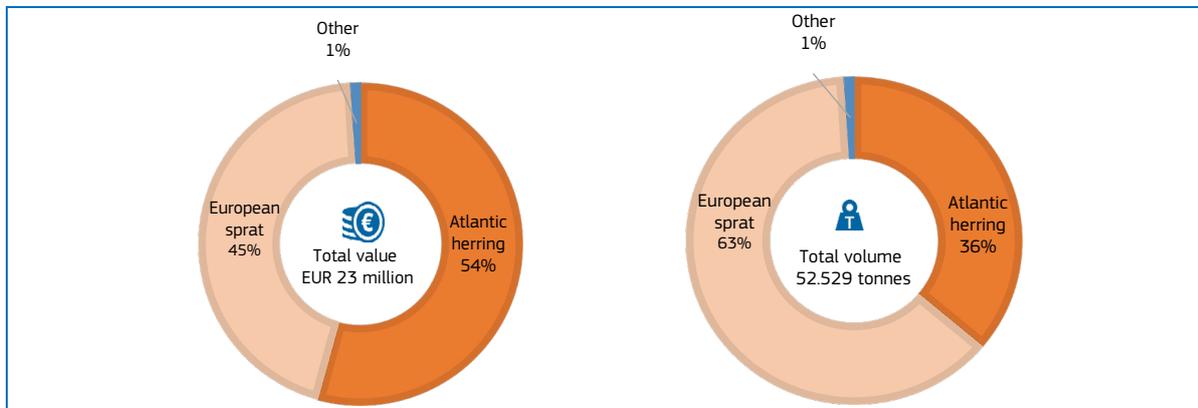
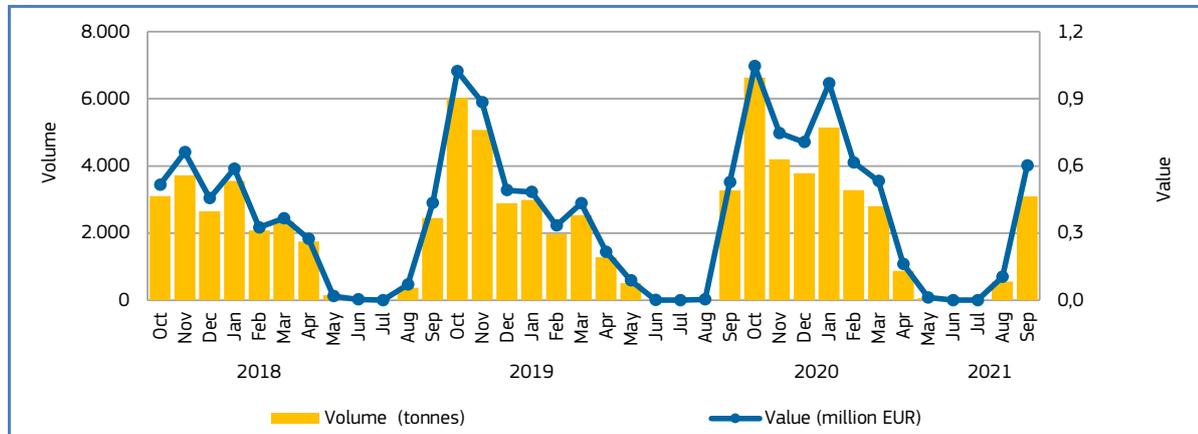
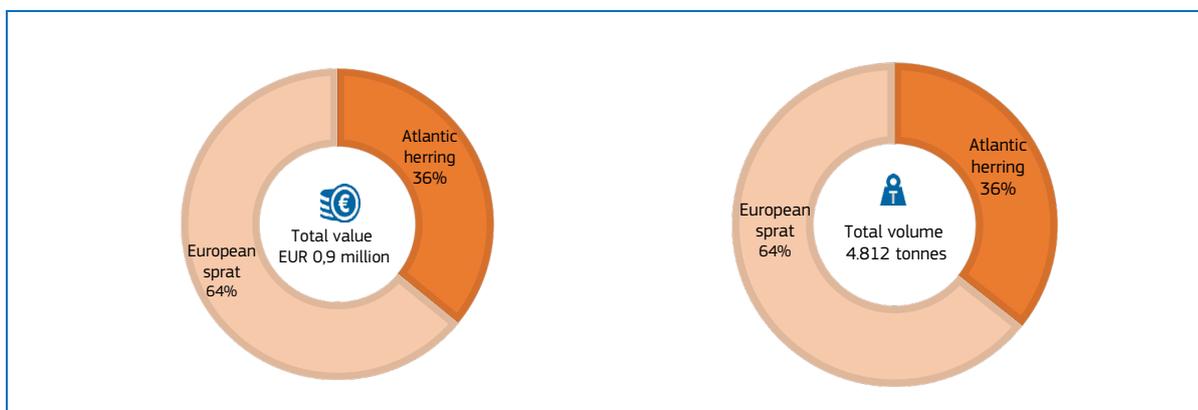


Figure 31. **EUROPEAN SPRAT: FIRST SALES IN ESTONIA, OCTOBER 2018 - SEPTEMBER 2021**



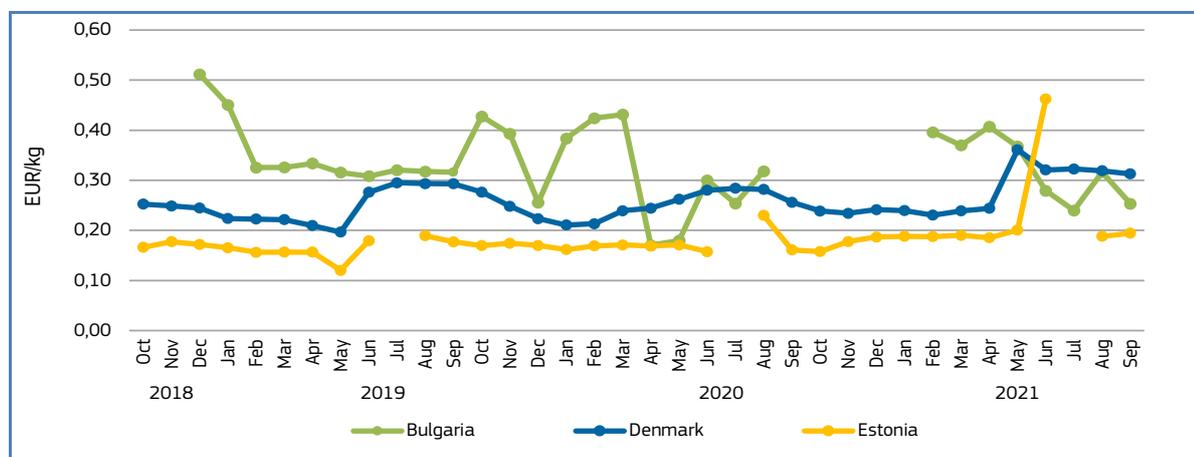
In **Estonia**, over the past 36 months (October 2018–September 2021), the highest first sales of European sprat were registered in October 2020 and 2019, when 6.630 tonnes and 6.028 tonnes were sold, respectively. In Estonia, the sprat fishery is seasonal, with the season starting after the summer, and lasting from September to March.

Figure 32. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN ESTONIA, IN VALUE AND VOLUME, SEPTEMBER 2021**



## Price trend

Figure 33. **EUROPEAN SPRAT: FIRST-SALES PRICES IN SELECTED COUNTRIES\* (OCTOBER 2018 - SEPTEMBER 2021)**



Over the 36-month observation period (October 2018 to September 2021), the weighted average first-sales price of European sprat in **Bulgaria** was 0,31 EUR/kg – 21% higher than in **Denmark** (0,26 EUR/kg), and 80% greater than that of **Estonia** (0,17 EUR/kg).

In **Bulgaria**, in September 2021, the average first-sales price of European sprat was 0,25 EUR/kg – 20% lower than in September 2019. In September 2020, there were no sales of sprat recorded in Bulgaria. The lowest price in the past 36 months was registered in April 2020, at 0,17 EUR/kg for 25 tonnes, while the highest price (0,67 EUR/kg for 3 tonnes) was observed in November 2020.

In **Denmark**, in September 2021, the average first-sales price of European sprat was 0,31 EUR/kg – 22% and 7% higher than in September 2020 and 2019, respectively. The lowest price in the past 36 months was registered in May 2019, at 0,20 EUR/kg for 7.971 tonnes, while the highest price (0,36 EUR/kg for 295 tonnes) was observed in May 2021.

In **Estonia**, in September 2021, the average first-sales price of European sprat was 0,19 EUR/kg – 21% and 10% higher than in September 2020 and 2019, respectively. The lowest price in the past 36 months was registered in October 2018, at 0,12 EUR/kg for 147 tonnes, while the highest price (0,46 EUR/kg for 8 kg) was observed in May 2021.

## 2. Extra-EU imports

The weekly extra-EU import prices (weighted average values per week, in EUR per kg) for nine different species are examined every month. The three most relevant species in terms of value and volume remain consistent: 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, and three are randomly selected. The commodity group for this month is “small pelagics”, and the featured species are frozen herrings from Norway, frozen mackerel from the Faroe Islands, and prepared or preserved anchovies, whole or in pieces (excl. minced) from Morocco. The three randomly selected species this month are fresh or chilled sole from Iceland, smoked Pacific/Atlantic/Danube salmon from Norway, and prepared or preserved skipjack, whole or in pieces, in vegetable oil (excl. minced) from Ecuador.

Data analysed in the section “Extra-EU imports” are extracted from EUMOFA, as collected from the European Commission<sup>19</sup>.

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 43/2021	Preceding 4-week average	Week 43/2020	Notes
<b>Fresh whole Atlantic salmon imported from Norway</b> <i>(Salmo salar,</i> CN code 03021440)	<b>Price (EUR/kg)</b>	5,82	5,64 (+3%)	4,37 (+33%)	In 2021, prices had a slight upward trend, in contrast with a downward trend over the past three years. Since week 30, prices have dropped below 6,00 EUR/kg. In 2021, 30% of the weekly prices were above 6,00 EUR/kg.
	<b>Volume (tonnes)</b>	16.965	17.197 (-1%)	17.115 (-1%)	In 2021, volume ranged from 6.189 (week 13) to 19.090 tonnes (week 37). Upward trend since the beginning of 2021, as well as over the past three years.
<b>Frozen Alaska pollock fillets imported from China</b> ( <i>Theragra chalcogramma,</i> CN code 03047500)	<b>Price (EUR/kg)</b>	2,87	2,82 (+2%)	2,62 (+9%)	Since the beginning of the year, prices ranged from 2,40 to 2,87 EUR/kg and had an upward trend, in line with the trend over the past 3-year period. On average, in 2021, prices were 2,58 EUR/kg.
	<b>Volume (tonnes)</b>	2.541	2.563 (-1%)	2.422 (+5%)	Since the beginning of the year, volumes fluctuated from 1.359 to 3.686 tonnes. On average, the weekly supply was 2.284 tonnes. Downward trend since the beginning of the year, same as the trend over the past three years.
<b>Frozen tropical shrimp imported from Ecuador</b> (genus <i>Penaeus,</i> CN code 03061792)	<b>Price (EUR/kg)</b>	6,25	6,13 (+2%)	4,96 (+26%)	Since week 1 of 2021, prices fluctuated from 4,58 to 6,32 EUR/kg, with an average of 5,44 EUR/kg. Upward trend since week 1 of 2021, in contrast with a downward trend over the past three years.
	<b>Volume (tonnes)</b>	1.714	2.473 (-31%)	3.686 (-53%)	Since week 1 of 2021, weekly volumes fluctuated from 1.118 to 4.176 tonnes, averaging 2.586 tonnes. Upward trend since the beginning of the year, in line with the trend over the past three years.

<sup>19</sup> Last update: 18.11.2021

Figure 34. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY, 2018 - 2021**

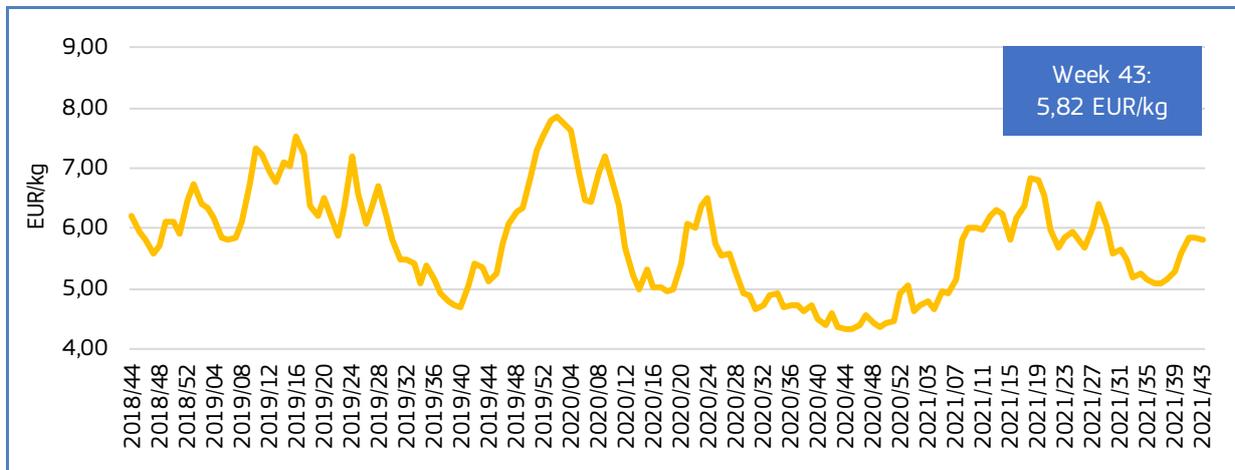


Figure 35. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2018 - 2021**

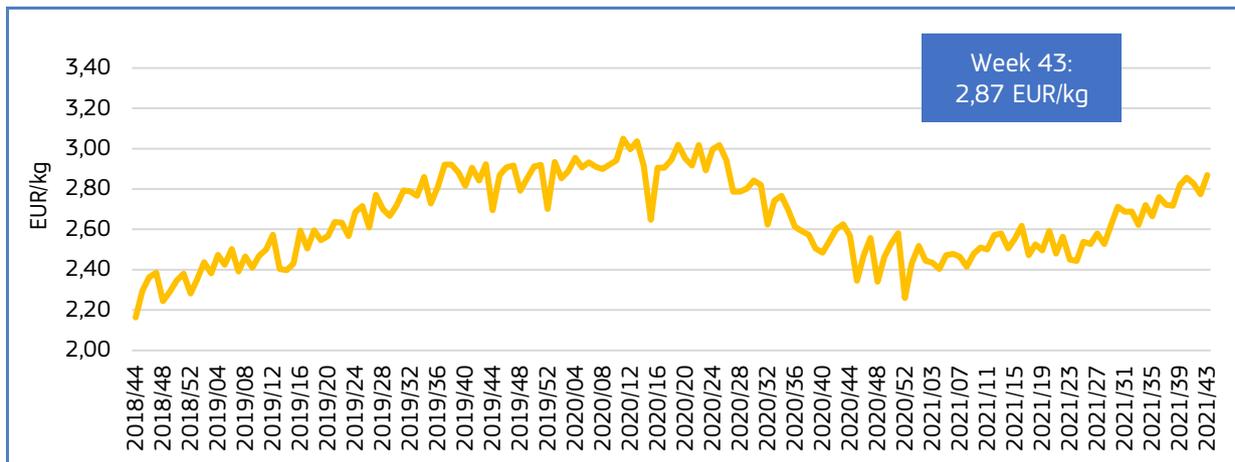


Figure 36. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2018 - 2021**

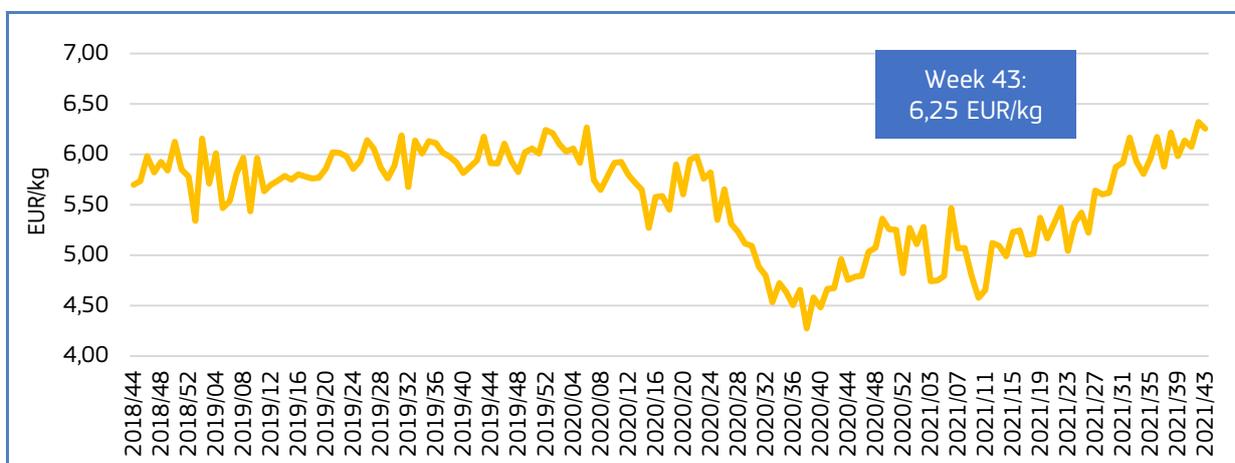


Table 21. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 43/2021	Preceding 4-week average	Week 43/2020	Notes
<b>Frozen herrings imported from Norway</b> ( <i>Clupea harengus</i> , <i>Clupea pallasii</i> , CN code 03035100)	<b>Price (EUR/kg)</b>	1,14	0,93 (+22%)	1,21 (-5%)	Upward trend over the past three years. Price fluctuated from 0,64 (week 48 of 2018) to 1,65 EUR/kg (week 22 of 2020). Price spikes did not always correlate with drop in supply.
	<b>Volume (tonnes)</b>	224	1.365 (-84%)	328 (-32%)	Upward trend over the past three years. Fluctuations in supply ranged from 19 (week 52 of 2018) to 4.744 tonnes (week 42 of 2021). Most of the weekly supply was less than 500 tonnes.
<b>Frozen mackerel imported from the Faroe Islands</b> ( <i>Scomber scombrus</i> , <i>Scomber japonicus</i> , CN code 03035410)	<b>Price (EUR/kg)</b>	1,21	1,59 (-24%)	1,68 (-28%)	Downward trend over the past three years. Price fluctuations ranged from 1,06 (week 33 of 2021) to 3,33 EUR/kg (week 30 of 2019). The price increases are correlated with a drop in supply from previous weeks.
	<b>Volume (tonnes)</b>	328	234 (+40%)	495 (-34%)	Downward trend over the past three years. Fluctuations in supply ranged from 16 (week 31 of 2019) to 4.442 tonnes (week 33 of 2021). Most of the weekly volumes were less than 500 tonnes.
<b>Prepared or preserved anchovies, whole or in pieces (excl. minced) imported from Morocco</b> (CN code 16041600)	<b>Price (EUR/kg)</b>	8,62	8,41 (+2%)	7,90 (+9%)	Downward trend from 2018 to 2021, with price ranging from 6,77 (week 26 of 2021) to 10,10 EUR/kg (week 35 of 2019). The price increases are correlated with a drop in supply from previous weeks.
	<b>Volume (tonnes)</b>	252	228 (+10%)	368 (-32%)	Upward trend from 2018 to 2021. Fluctuations in supply from 77 (week 33 of 2019) to 438 tonnes (week 32 of 2019); most weekly volumes were above 200 tonnes.

Figure 37. **IMPORT PRICE OF FROZEN HERRINGS FROM NORWAY, 2018 - 2021**

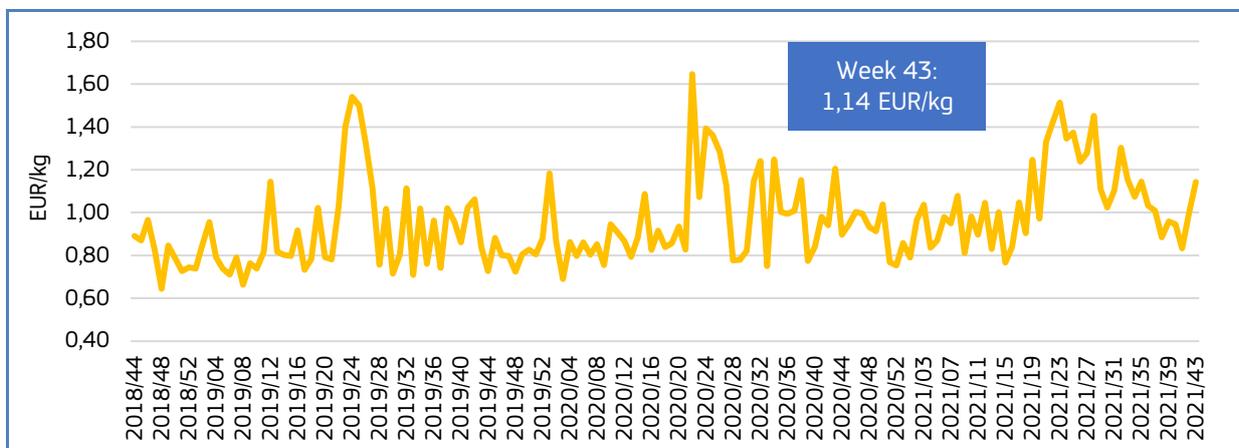


Figure 38. **IMPORT PRICE OF FROZEN MACKEREL FROM THE FAROE ISLANDS, 2018 - 2021**

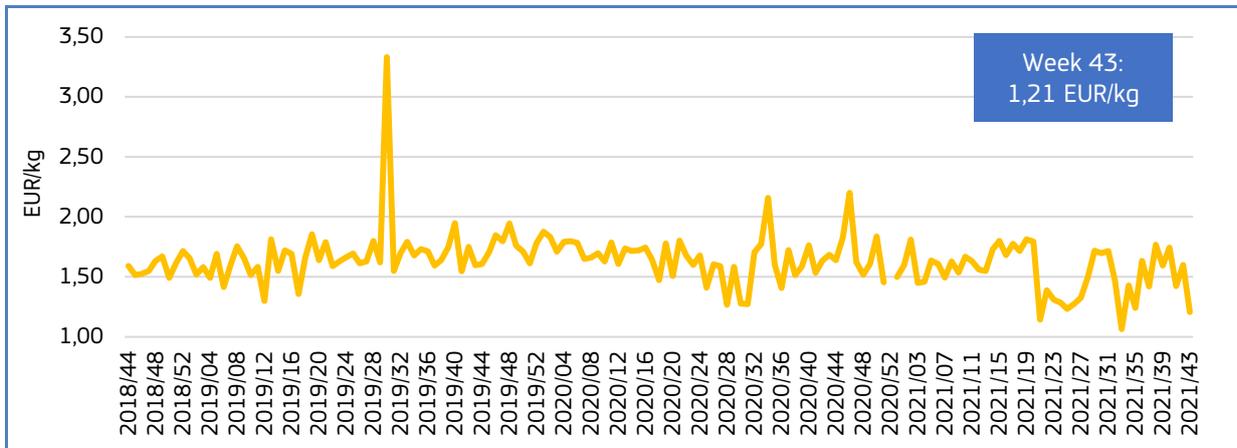
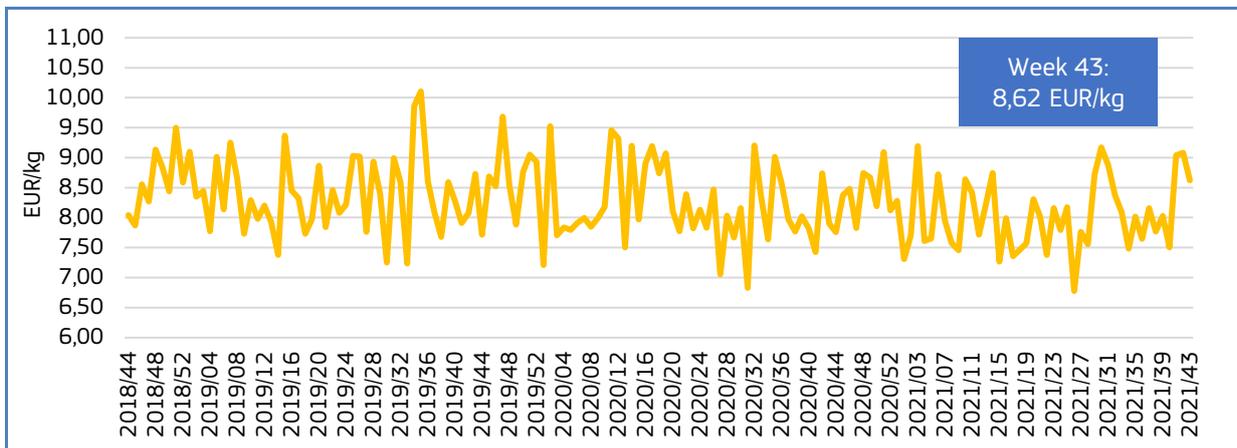


Figure 39. **IMPORT PRICE OF PREPARED OR PRESERVED ANCHOVIES FROM MOROCCO, 2018 - 2021**



Since week 1 of 2021, price of frozen herrings from Norway showed an upward trend and averaged around 1,00 EUR/kg. Supply also exhibited an upward trend and ranged from 55 to 4.744 tonnes.

Since the beginning of 2021, both price and volume of frozen mackerel from the Faroe Islands showed a decreasing trend. Price ranged from 1,06 to 1,81 EUR/kg, and volume from 22 to 4.442 tonnes.

Price and volume of prepared or preserved anchovies from Morocco showed an upward trend since the beginning of 2021. Price ranged from 6,77 to 9,19 EUR/kg, and volume from 95 to 406 tonnes.

Table 22. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF EU IMPORTS OF THREE OTHER FISHERIES AND AQUACULTURE PRODUCTS RELEVANT TO THE EU MARKET**

Extra-EU Imports	Week 43/2021	Preceding 4-week average	Week 43/2020	Notes	
<b>Fresh or chilled sole imported from Iceland</b> ( <i>Solea</i> spp, CN code 03022300)	<b>Price (EUR/kg)</b>	12,83	14,44 (-11%)	11,32 (+13%)	Upward trend from 2018 to 2021. Price ranged from 6,30 (week 16 of 2019) to 16,90 EUR/kg (week 2 of 2021). Most of the price spikes correlated with a drop in supply from the previous week.
	<b>Volume (tonnes)</b>	8,7	8,2 (+7%)	6,0 (+45%)	Fluctuations in supply, varying between 0,8 (week 47 of 2018) and 13 tonnes (week 12 of 2019). Overall upward trend.
<b>Smoked Pacific/Atlantic/Danube salmon imported from Norway</b> (CN code 03054100)	<b>Price (EUR/kg)</b>	19,50	18,62 (+5%)	14,77 (+32%)	Upward trend over the past three years. Price spikes were related to a drop in supply from the previous week. Price fluctuations varied from 7,20 (week 42 of 2019) to 25,93 EUR/kg (week 1 of 2020).
	<b>Volume (tonnes)</b>	5,8	12 (-52%)	20 (-72%)	Downward trend over the past three years. High fluctuations in supply from 0,5 (week 52 of 2018) to 46 tonnes (week 50 of 2019).
<b>Prepared or preserved skipjack, whole or in pieces, in vegetable oil (excl. minced) imported from Ecuador</b> (CN code 16041421)	<b>Price (EUR/kg)</b>	3,93	3,67 (+7%)	3,73 (+5%)	Downward trend from 2018 to 2021, with prices ranging from 3,35 (week 16 of 2020) to 4,98 EUR/kg (week 44 of 2020). The price spikes are related to a drop in supply from the previous week.
	<b>Volume (tonnes)</b>	726	581 (+25%)	589 (+23%)	From 2018 to 2020, volume ranged between 147 (week 7 of 2021) and 1.927 tonnes (week 27 of 2019), with an overall downward trend.

Figure 40. **IMPORT PRICE OF FRESH OR CHILLED SOLE FROM ICELAND, 2018 - 2021**

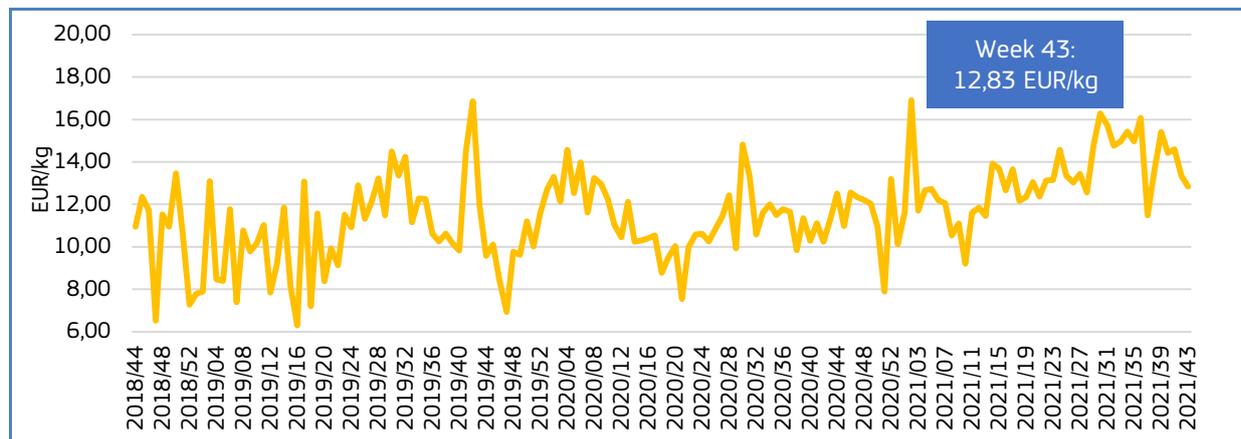


Figure 41. **IMPORT PRICE OF SMOKED PACIFIC/ATLANTIC/DANUBE SALMON FROM NORWAY, 2018 - 2021**

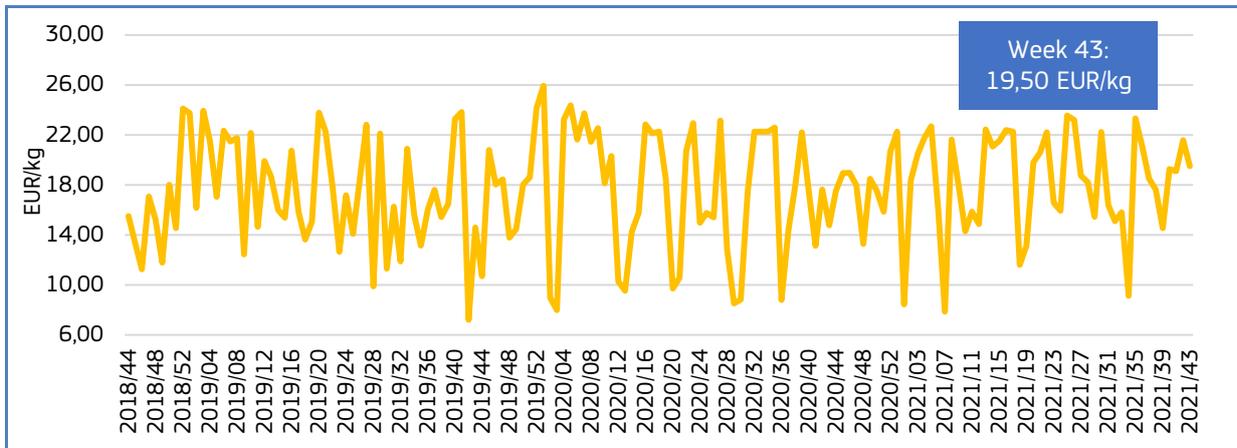
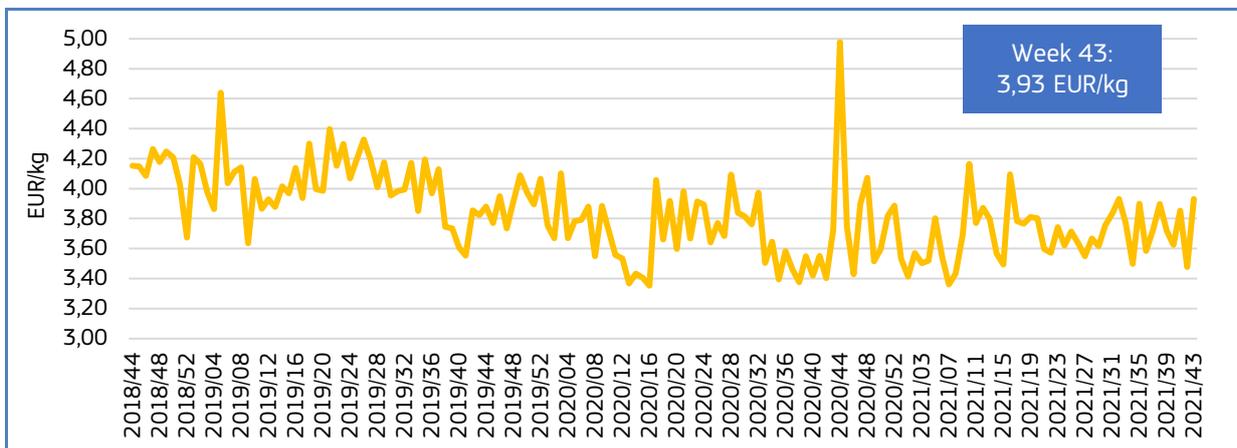


Figure 42. **IMPORT PRICE OF PREPARED OR PRESERVED SKIPJACK FROM ECUADOR, 2018 - 2021**



Since the first week of January 2021, both price and volume of fresh or chilled sole from Iceland have exhibited an upward trend. Price ranged from 9,21 to 16,90 EUR/kg.

Since the beginning of the year, the price of smoked Pacific/Atlantic/Danube salmon from Norway had an upward trend, while volume exhibited the opposite trend. Supply ranged from 2,6 to 24 tonnes.

From the beginning of 2021, both price and volume of prepared or preserved skipjack from Ecuador exhibited an upward trend. Price ranged from 3,36 to 4,16 EUR/kg and supply from 147 to 1.311 tonnes.

## 3. Consumption

### 3.1. HOUSEHOLD CONSUMPTION IN THE EU

Data analysed in the section “Consumption” are extracted from EUMOFA, as collected from Europanel<sup>20</sup>.

In September 2021, compared with September 2020, household consumption of fresh fisheries and aquaculture products increased in both volume and value in Poland, mainly due to salmon (+6%, and +11%, respectively). Salmon was also the main cause for Sweden’s decreased consumption (–29% in volume, –26% in value). In France, the volume increase was mainly due to gilthead seabream and mackerel (+27%, and +33%, respectively); at the same time, cod (–15%) and trout (–16%) were the main contributors to the value decrease. In Germany, plaice (–64% in volume, –61% in value), cod (–34% in volume, –30% in value), and trout (–34% in volume, –31% in value) were the least consumed species. In Denmark, the drop in consumption was primarily due to flounder (–25% in both volume and value), as well as salmon (–11% in volume, –7% in value). Salmon (–8% in both volume and value) and cod (–45% in volume, –48% in value) were the least consumed species in Ireland. In Italy, the value increase was due to European seabass and salmon (+20% and +12%, respectively), while the volume decrease was due to mussel *Mytilus* spp. (–23%) and anchovy (–24%). Mussel *Mytilus* spp. (–29% in volume, –21% in value) as well as salmon (–13% in volume, –14% in value) were the contributors to the Netherlands consumption decrease, whereas in Portugal main contributors were European seabass (–19% in volume, –12% in value) and mackerel (–28% in volume, –10% in value). In Spain, hake and sardine were the least consumed in volume (–19% and –24% respectively), while monk and miscellaneous tunas were the least consumed in value (–31% and –32% respectively).

Table 23. OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)

Country	Per capita consumption 2018* (live weight equivalent, LWE) kg/capita/year	September 2019		September 2020		August 2021		September 2021		Change from September 2020 to September 2021	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	39,83	1.012	15,61	1.218	18,84	1.048	17,98	1.120	18,36	8%	3%
France	33,52	16.773	184,73	18.012	202,41	16.401	185,61	19.594	193,62	9%	4%
Germany	14,50	4.581	62,52	5.575	80,54	4.746	72,88	5.175	74,30	7%	8%
Hungary	6,12	333	1,74	331	2,03	346	2,19	238	1,78	28%	13%
Ireland	23,13	1.104	16,70	1.049	15,28	893	13,77	898	13,72	14%	10%
Italy	31,02	30.052	301,50	30.223	310,76	21.962	228,44	29.360	317,14	3%	2%
Netherlands	20,90	3.665	52,25	4.309	61,47	3.134	45,84	3.893	58,20	10%	5%
Poland	13,02	3.071	19,78	3.118	21,36	2.755	19,65	3.259	22,75	5%	6%
Portugal	60,92	6.358	41,07	6.777	42,91	6.243	41,53	6.031	40,91	11%	5%
Spain	46,01	46.973	368,98	53.285	417,49	43.000	352,56	45.133	381,07	15%	9%
Sweden	26,61	764	9,88	1.165	13,30	887	12,62	901	12,01	23%	10%

\*Data on per capita consumption of all fish and seafood products for all EU Member States can be found at: [https://www.eumofa.eu/documents/20178/415635/EN\\_The+EU+fish+market\\_2020.pdf/](https://www.eumofa.eu/documents/20178/415635/EN_The+EU+fish+market_2020.pdf/)

Over the past three years, the September average household consumption of fresh fisheries and aquaculture products in volume has been above the annual average in six of the Member States analysed: Denmark, France, Italy, the Netherlands,

<sup>20</sup> Last update: 14.11.2021

Portugal, and Sweden. In terms of value, the September average household consumption was below the annual average in most countries, except Italy and the Netherlands.

The most recent weekly consumption data (up to **week 46 of 2021**) are available on the EUMOFA website and can be accessed [here](#).

## 3.2. Saithe (also known as coalfish)

**Habitat:** A demersal species, found in inshore and offshore waters at depths of up to about 200 m.<sup>21</sup>

**Catch area:** Eastern Atlantic: Barents Sea, Spitsbergen to Bay of Biscay, around Iceland. Western Atlantic: southwest Greenland, Hudson Strait to North Carolina.<sup>22</sup>

**Production method:** Caught.

**Main consumers in the EU:** France, Germany, Denmark, and Belgium.<sup>23</sup>

**Presentation:** Whole, fillets.

**Preservation:** Fresh, frozen, dried-salted, smoked, and canned.<sup>24</sup>

### 3.2.1. Overview of household consumption in France, Germany, and Ireland

France is one of the EU Member States where the per capita apparent consumption<sup>25</sup> of fisheries and aquaculture products is above the EU average. In 2018, this amounted to 33,52 kg, an increase of 1%, compared to the previous year, and 38% higher than the EU average (24,36 kg LWE).

In Germany, per capita apparent consumption was 14,50 kg (up by 3% from 2017), while in Ireland it reached 23,13 kg (down by 3% from 2017).

See more on per capita apparent consumption of all fresh fisheries and aquaculture products in the EU in Table 23.

For the three countries, total household consumption and average expenditure for a kilogram of saithe (or coalfish), between October 2018 – September 2021, came to:

- France: 29.130 tonnes; 10,21 EUR/kg.
- Germany: 3.024 tonnes; 13,40 EUR/kg.
- Ireland: 1.391 tonnes; 10,70 EUR/kg.

We have covered **saithe (or coalfish)** in previous *Monthly Highlights*:

**First sales:** June/2013; 1/2014; 5/2014; 3/2015; 7/2015; 2/2016; 6/2016; 6/2019

**Imports:** 2/2018 (saithe frozen fillets)

**Consumption:** 4/2017; 7/2019

**Case study:** 1/2019 (Saithe Fresh Fillet in France)

<sup>21</sup> <https://www.fishbase.se/Summary/SpeciesSummary.php?ID=1343&AT=coalfish>

<sup>22</sup> **Ibidem**

<sup>23</sup> **Eumofa Monthly Highlights no. 7 / 2019.**

<sup>24</sup> <https://www.fishbase.se/Summary/SpeciesSummary.php?ID=1343&AT=coalfish>

<sup>25</sup> "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. It is worth underlining that the methodologies for estimating apparent consumption at EU and Member State levels are different, the first based on data and estimates as described in the Methodological background, the latter also requiring the adjustment of abnormal trends due to the higher impact of stock changes.

Figure 43. PRICES OF SAIthe (OR COALFISH) PURCHASED BY FRENCH, GERMAN, AND IRISH HOUSEHOLDS

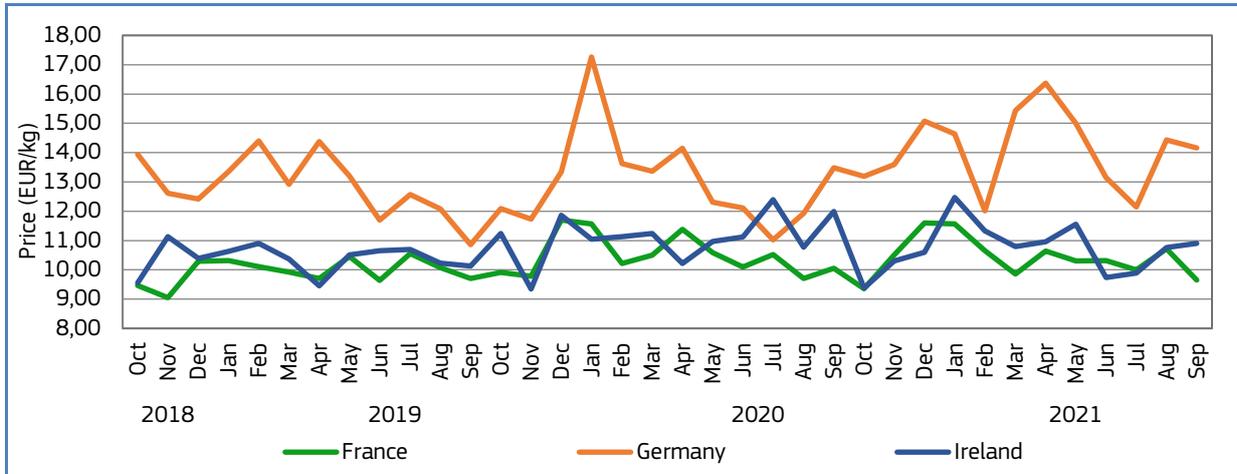
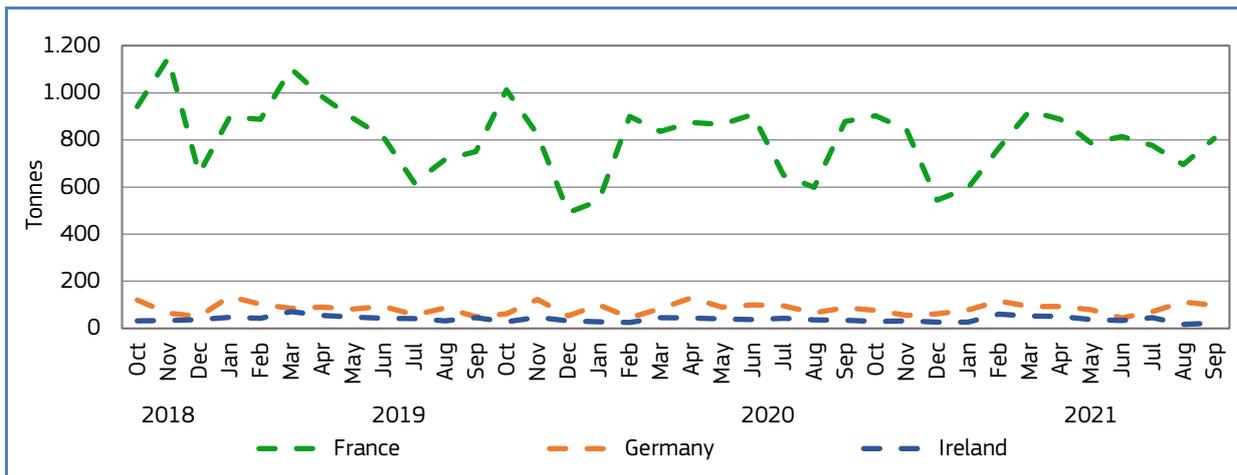


Figure 44. HOUSEHOLD PURCHASES OF SAIthe (OR COALFISH) IN FRANCE, GERMANY, AND IRELAND



### 3.2.2. Household consumption trends in France

**Long-term trend (October 2018 to September 2021):** Upward trend in price, downward trend in volume.

**Yearly average price:** 9,50 EUR/kg (2018), 10,09 EUR/kg (2019), 10,45 EUR/kg (2020).

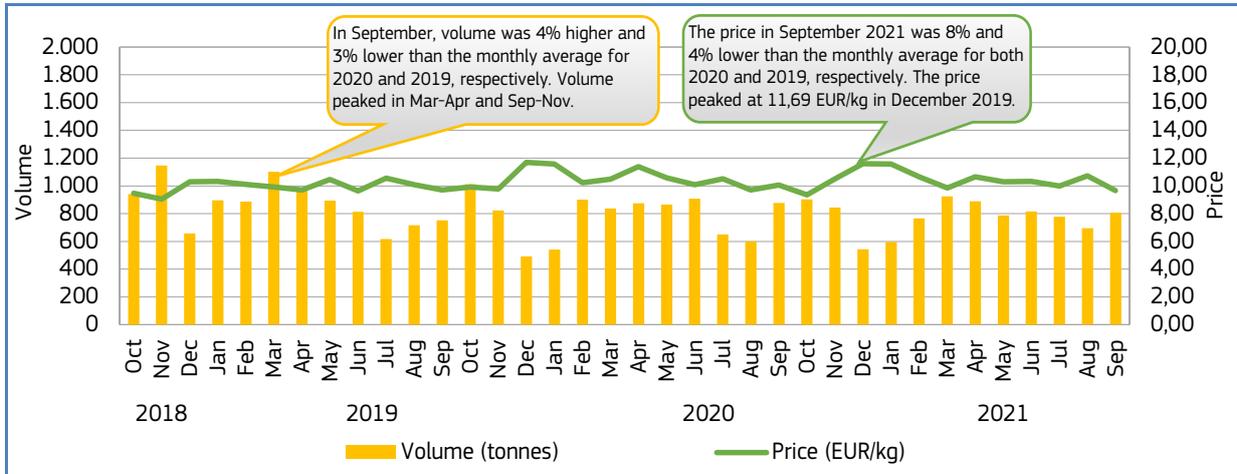
**Yearly consumption:** 10.188 tonnes (2018), 9.988 tonnes (2019), 9.344 tonnes (2020).

**Short-term trend (January to September 2021):** Decrease in price (17%), increase in volume (35%).

**Average price:** 10,37 EUR/kg.

**Consumption:** 7.051 tonnes.

Figure 45. **RETAIL PRICE AND VOLUME OF SAIthe (OR COALFISH) PURCHASED BY HOUSEHOLDS IN FRANCE, OCTOBER 2018 – SEPTEMBER 2021**



### 3.2.3. Household consumption trends in Germany

**Long-term trend (October 2018 to September 2021):** Upward trend in price, downward trend in volume.

**Yearly average price:** 12,63 EUR/kg (2018), 12,80 EUR/kg (2019), 13,44 EUR/kg (2020).

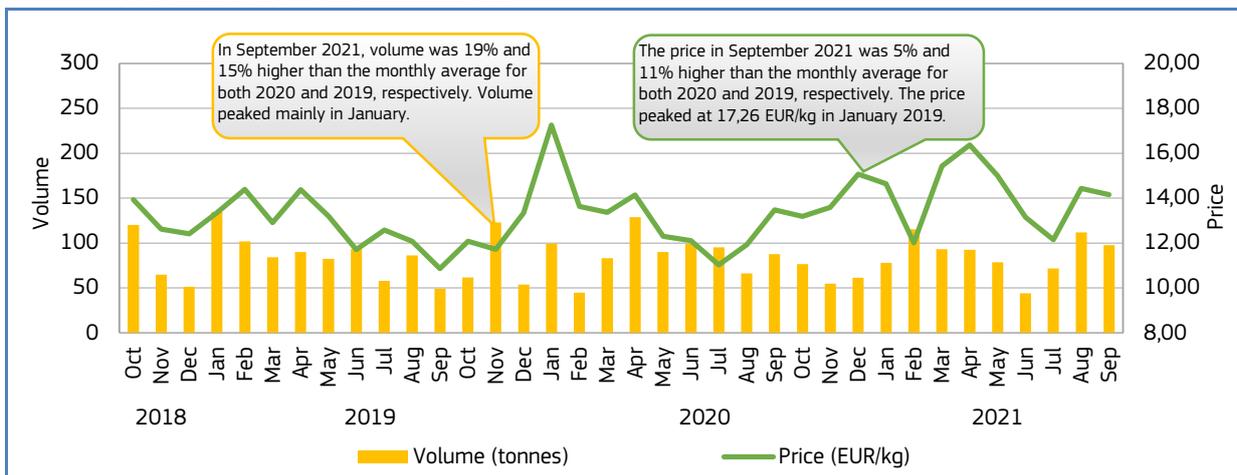
**Yearly consumption:** 1.063 tonnes (2018), 1.019 tonnes (2019), 987 tonnes (2020).

**Short-term trend (January to September 2021):** Decrease in price (3% from January), decrease in volume (despite a 25% increase from January).

**Average price:** 14,19 EUR/kg.

**Consumption:** 783 tonnes.

Figure 46. **RETAIL PRICE AND VOLUME OF SAIthe (OR COALFISH) PURCHASED BY HOUSEHOLDS IN GERMANY, OCTOBER 2018 – SEPTEMBER 2021**



### 3.2.4. Household consumption trends in Ireland

**Long-term trend (October 2018 to September 2021):** Upward trend in price, downward trend in volume.

**Yearly average price:** 10,23 EUR/kg (2018), 10,42 EUR/kg (2019), 10,98 EUR/kg (2020).

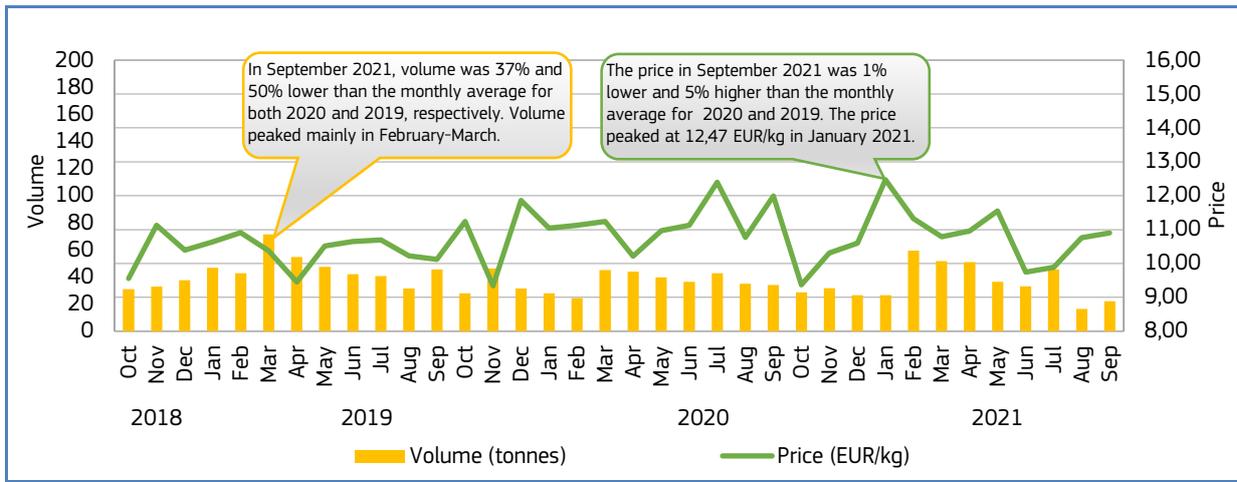
**Yearly consumption:** 528 tonnes (2018), 529 tonnes (2019), 417 tonnes (2020).

**Short-term trend (January to September 2021):** Decrease in both price (13% from January), and volume (17% from January).

**Average price:** 10,91 EUR/kg.

**Consumption:** 343 tonnes.

Figure 47. **RETAIL PRICE AND VOLUME OF SAITHE (OR COALFISH) PURCHASED BY HOUSEHOLDS IN IRELAND, OCTOBER 2018 – SEPTEMBER 2021**



## 4. Case study – Fisheries and aquaculture in the Philippines

### 4.1 Introduction

The Republic of the Philippines is an archipelago in Southeast Asia consisting of 7,641 islands, spanning over 300,000 square kilometres of territory. The archipelago is divided into three island groups: Luzon, Visayas, and Mindanao, and is characterized by its irregular configuration and 36,290 km long coastline. It is bounded by the Philippine Sea to the east, the Celebes Sea to the south, the Sulu Sea to the southwest, and the South China Sea to the west and north. The islands sit at the heart of the coral triangle, a global centre of marine biodiversity<sup>26</sup>, and are primarily composed of volcanic rock and corals. They are home to nearly 60% of the world's known species of fish, as well as over 300 species of corals.

Due to its geographic location, abundance of marine life, and important aquaculture sector, the Philippines is one of the top fish producing countries in the world, ranking in eighth place with a total annual production of 4,35 million tonnes of fish, crustaceans, molluscs, and aquatic plants (including seaweed) in 2018. The country's total fisheries and aquaculture production constituted 2,06% of the total world production of 211,87 million tonnes<sup>27</sup>.

Fisheries are of great significance in terms of food security and the economy in the Philippines, as 70% of Filipinos are estimated to live in coastal areas. In 2020, the estimated population in the Philippines was 109 million, with yearly seafood consumption estimated at 40 kg per capita. While the consumption of fish and aquaculture products is high, the Philippine economy also greatly relies on the trade and exports of fishery and aquaculture products to other countries, especially to its neighbouring countries in Asia.



Source: The World Factbook<sup>1</sup>

### 4.2 Total fisheries and aquaculture production

Total production of fisheries and aquaculture products in the Philippines is divided into four sub-sectors: commercial fisheries, marine municipal fisheries, inland municipal fisheries, and aquaculture. Municipal fisheries are traditional, artisanal, subsistence or small-scale fisheries that involve the use of vessels that are 3 gross tons (GT) or less, as well as fishing operations that do not use fishing boats. Commercial fisheries include all fishing operations that use vessels of over 3,1 GT. Inland fisheries operate in enclosed freshwater areas such as lakes and reservoirs, using vessels of 3 GT or less<sup>28</sup>.

### Fisheries

Fisheries in the Philippines have been quite stable in recent years. Volumes were lowest in 2017, dropping 8% from the year before, however, they went up 9% in the following year and then remained stable<sup>29</sup>.

<sup>26</sup> Carpenter, K.E. and V.G. Springer. 2005. The center of the center of marine shore fish biodiversity: the Philippine Islands. *Environ Biol Fish* (2005) 72: 467. <https://doi.org/10.1007/s10641-004-3154-4>

<sup>27</sup> <https://www.bfar.da.gov.ph/publication>

<sup>28</sup> [https://www.fao.org/faolex/results/details/en/c/LEX-FAOC016098/#:~:text=Philippine%20Fisheries%20Code%20of%201998,8550\).&text=It%20is%20a%20declared%20policy,the%20protection%20of%20municipal%20fishermen](https://www.fao.org/faolex/results/details/en/c/LEX-FAOC016098/#:~:text=Philippine%20Fisheries%20Code%20of%201998,8550).&text=It%20is%20a%20declared%20policy,the%20protection%20of%20municipal%20fishermen)

<sup>29</sup> FAO

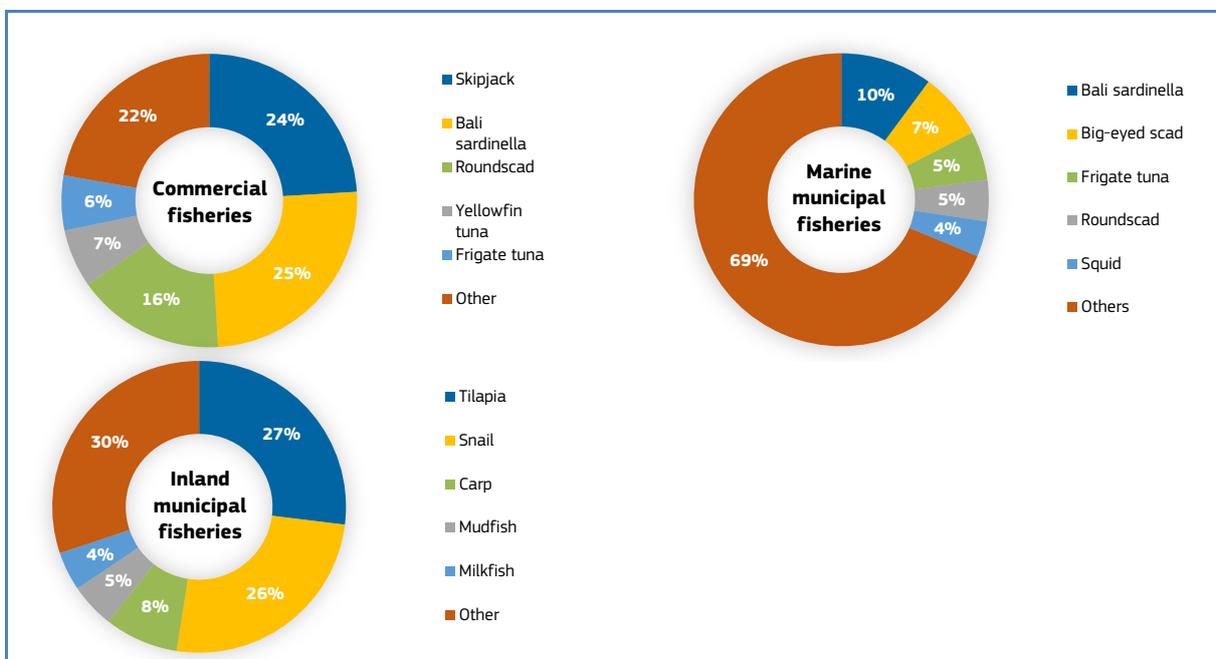
Table 24. **TOP FISH SPECIES IN THE PHILIPPINES' CATCHES (volume in 1.000 tonnes)**

	2015	2016	2017	2018	2019
Skipjack tuna	149	126	111	258	266
Bali sardinella				259	248
Scads nei	231	217	188	177	195
Frigate and bullet tunas	138	134	122	112	112
Bigeye scad	117	113	109	111	109
Yellowfin tuna	92	84	84	94	99
Other	1.439	1.376	1.277	1.049	1.033
<b>Total</b>	<b>2.164</b>	<b>2.050</b>	<b>1.892</b>	<b>2.061</b>	<b>2.062</b>

Source: FAO

The dominant fish species in the Philippines' fisheries are tuna and tuna-like species and scads, among others. Besides skipjack tuna (*Katsuwonus pelamis*) volumes, which more than doubled from 2017 to 2018, reaching a volume of 258.000 tonnes, there were no other significant changes in catch volumes for the other dominant species. The data provided by the Philippines Statistics Authority show that the catch volume trend remained quite stable in 2020 and the first two quarters of 2021, which was consistent with FAO data. Commercial and marine municipal fisheries are operating at similar levels in relation to catch-volumes, with commercial fisheries fluctuating between 948 and 975 thousand tonnes between 2017 and 2020, and municipal fisheries fluctuating between 962 and 952 thousand tonnes over the same period. Inland municipal fisheries, however, made the lowest contribution to total catch, fluctuating from 164 to 150 thousand tonnes from 2017 to 2020, a decrease of 8%. The main fish species in each of these fisheries in 2020 are presented in Figure 1. 71% of commercial capture fisheries' production was comprised of Bali sardinella (25%), Skipjack (24%), and Roundscad (22%). Tuna, tuna-like species and others comprised the remaining 29%. Marine municipal fisheries were dominated by various species in 2020, however significant volumes had as well Bali sardinella, Big-eyed scad, Frigate tuna and other. Tilapia and snail contributed more than 50% of total inland municipal fisheries catch by volume.

Figure 48. **TOP SPECIES IN DIFFERENT SUB-SECTORS (%) IN 2020**

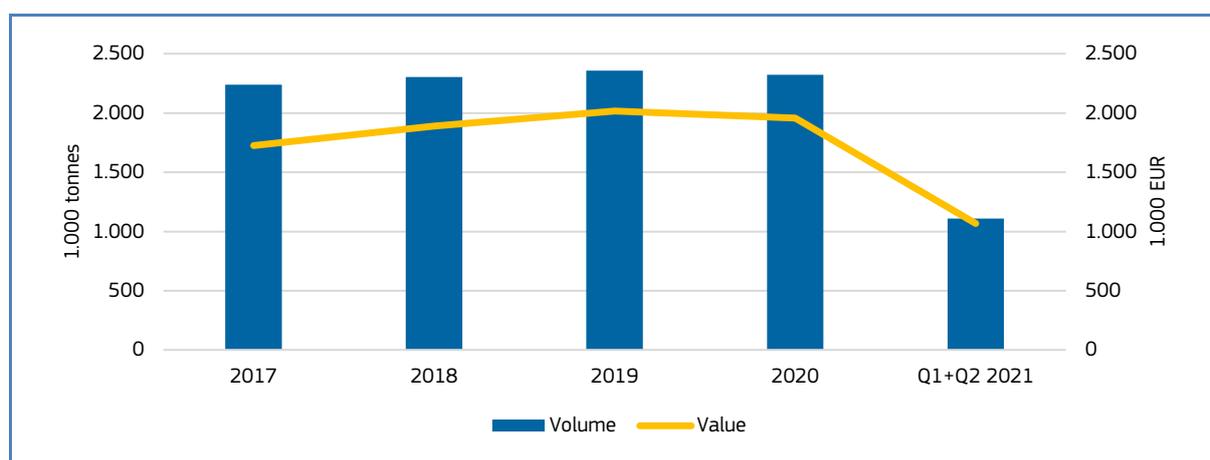


Source: Philippine Statistics Authority (PSA)

## Aquaculture

In 2020, aquaculture production was 2,3 million tonnes. Compared with the previous year's performance, the aquaculture sector posted a decline of 1,5% or 35.428 tonnes in production. 1,1 million tonnes of aquaculture products have been produced over the first two quarters of 2021. Value has shown an increasing trend since 2017, however, it dropped by 3% from 2019 to 2020.

Figure 49. **VOLUME (in 1.000 tonnes) AND VALUE (in 1.000 EUR) OF AQUACULTURE PRODUCTION**



Source: Philippine Statistics Authority (PSA). Average exchange rate from European Central Bank (ECB): PHP to EUR from period January 2017 to July 2021 (58,411).

Among all the species under the aquaculture sub-sector, seaweed was the main commodity produced in 2020 (by volume), accounting for 63%, or 1,5 million tonnes, of total sub-sectoral production. It was followed by milkfish and tilapia, which accounted for 18 % and 11% of volume produced, respectively.

Table 25. **MAIN AQUACULTURE SPECIES IN THE PHILIPPINES (volumes in 1.000 tonnes and values in million EUR)**

	2017		2018		2019		2020		Q1+Q2 2021	
	Volume	Value								
Seaweed	1.415	142	1.478	187	1.500	203	1.469	182	650	83
Milkfish	411	644	395	698	410	734	414	743	185	357
Tilapia	268	350	277	369	279	385	264	391	166	240
Oyster	23	4	29	5	36	12	53	18	31	13
Prawn	46	367	45	372	46	394	42	350	20	189
Other	75	216	80	258	87	290	81	275	55	186
<b>Total</b>	<b>2.238</b>	<b>1.724</b>	<b>2.304</b>	<b>1.889</b>	<b>2.358</b>	<b>2.017</b>	<b>2.323</b>	<b>1.958</b>	<b>1.108</b>	<b>1.068</b>

Source: Philippine Statistics Authority (PSA). Average exchange rate from European Central Bank (ECB): PHP to EUR from period January 2017 to July 2021 (58,411).

Aquaculture in the Philippines includes production in brackish water fishponds, freshwater fishponds, fish pens and fish cages in fresh and marine waters, and the mariculture of oysters, mussels and seaweed. In 2020, the main species produced in brackish-water fish ponds were milkfish, tiger prawns, and mudcrabs. Total production in brackish water fish cages reached 1.432 tonnes (83% of which was milkfish), and brackish water fish pens produced 913 tonnes (93% milkfish). The total production for freshwater fishponds reached 171.000 tonnes (96% of which came from tilapia production), freshwater fish cage production reached 74.000 tonnes (87% being tilapia), and freshwater fish pen production was just under 40.000 tonnes (with tilapia, milkfish, and carp accounting for 43%, 30%, and 27% of production, respectively).

When it comes to marine production, water fish cages produced 150.000 tonnes (99,9% being milkfish), and fish pens produced 846 tonnes. Total mariculture production was 1.5 million tonnes, with seaweed (*Kappaphycus alvarezii*) making up more than 95% of the total production. The majority of milkfish production came from brackish water (59%), with the majority of this being produced in fishponds. 93% of tilapia production came from freshwater, again, mostly in fishponds. Shrimp/prawn production reached 70.475 tonnes in 2020, with tiger prawns (*Penaeus monodon*) recording the highest volume (42.454 tonnes), followed by Pacific white shrimp (*Penaeus vannamei*) (21.000 tonnes).

### 4.3 International trade

Total export volume for the Philippines in 2020 was just below 250.000 tonnes, representing an increase of 6,5% from 2019. However, compared with 2017, export volumes decreased by 24%. In previous years, a general decreasing trend in export volumes of fishery and aquaculture products (FAPs) has been seen. In 2020, the USA acquired 15,4% (39.000 tonnes) of all fish and fishery export products from the Philippines, followed by Japan (11,3%), China (10,2%), and Germany (10%). In terms of value, fishery exports generated EUR 709 million. More than 70% of exported fishery and aquaculture products, by volume, were tuna and tuna-like species, seaweed, shrimp, salmonids, octopus, clam and other derivatives of fish. Miscellaneous tuna species were mostly exported in prepared/preserved states, while yellowfin tuna was mostly exported frozen (either gutted or whole), or in a live/fresh condition. The main destination countries for miscellaneous tuna species in 2020 were Germany, Japan, the UK, the USA, and the Netherlands. For yellowfin tuna, the main destinations were Italy, Vietnam, the USA, Spain, and Japan. Seaweed exports in 2020 reached 12.924 tonnes at a value of EUR 19 million. The main destination countries were China, France, the USA, Argentina, and Brazil. Exports of shrimp and prawn totalled 3.276 tonnes, with a value of almost EUR 16 million. Of this, 46% was exported to Japan, and 20% was exported to the USA. Shrimp and octopus were mainly exported frozen - gutted, or whole.

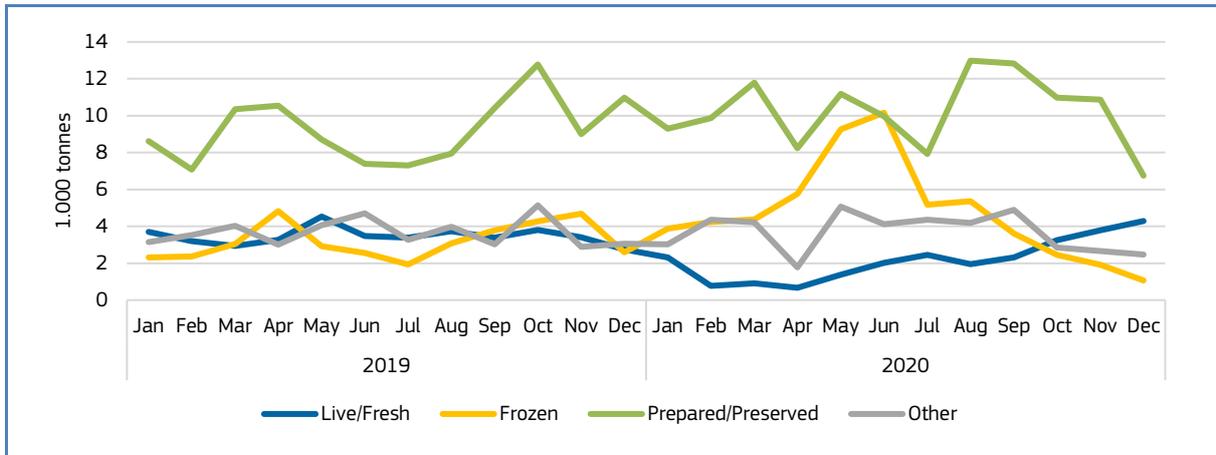
Table 26. **TOP EXPORTS IN TERMS OF VOLUME (1.000 tonnes) AND VALUE (million EUR)**

Species	2017		2018		2019		2020		Jan-Jun 2021	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Tuna, miscellaneous	185	262	160	316	95	292	104	310	50	158
Tuna, yellowfin	31	99	27	86	27	94	42	110	5	15
Seaweed and other algae			3	3	11	17	13	19	5	6
Fishmeal	4	3	4	3	5	3	9	8	5	4
Other salmonids	0,05	0,05	3	12	4	17	6	25	0,001	0,002
Octopus	6	22	7	29	7	30	5	18	3	11
Crab	18	123	16	114	11	88	4	43	4	44
Fish oil	0,5	2	1	4	1	2	4	6	2	4
Shrimp, miscellaneous	10	55	7	34	7	36	3	16	2	8
Clam			2	4	2	5	3	4	1	2
Other	77	203	66	165	65	165	58	149	42	105
<b>Total</b>	<b>331</b>	<b>769</b>	<b>296</b>	<b>771</b>	<b>235</b>	<b>749</b>	<b>250</b>	<b>709</b>	<b>120</b>	<b>356</b>

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

Prepared/preserved products dominate total export volumes (49% in 2020) and values from the Philippines. Furthermore, in 2020, frozen product exports increased in volume, and exports of live/fresh products decreased, coinciding with the COVID-19 pandemic (Figure 3). Frozen products (which accounted for 23% of exports by volume in 2020) were mostly represented by yellowfin tuna (whole or gutted) and other tuna-like species (not including fillets), as well as shrimp. Live/fresh products were mostly clam and yellowfin tuna. The main destination export countries for clam were Asian countries, such as Taiwan and Hong Kong. Live/fresh yellowfin tuna was mostly exported to Hong Kong, the Netherlands, Switzerland, and the USA.

Figure 50. **PRODUCT PRESERVATION VOLUME TRENDS IN 2019-2020 (1.000 tonnes)**



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

Total import volumes showed an increasing trend between 2017 and 2019, rising from 663.000 tonnes to 684.000 tonnes. However this dropped to 580.000 tonnes in 2020, a decrease of 15%. Value-wise, the same trend was observed, with a decline of 22,4% in 2020 compared with the previous year. Value in 2020 amounted to EUR 589 million. This means that the Philippines had a positive trade balance, with export value exceeding import value by 120 million EUR.

Table 27. **IMPORT VOLUMES AND VALUES BY COUNTRY (1.000 tonnes and million EUR)**

Country	2017		2018		2019		2020		Jan-Jun 2021	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
China	213	150	224	176	193	183	138	135	97	92
United States	47	44	56	54	78	54	87	43	18	17
Vietnam	125	99	103	100	110	119	77	68	42	38
Papua New Guinea	52	72	58	76	101	130	69	83	70	75
Korea, Republic of	16	21	12	14	13	17	19	19	8	8
Japan	25	20	38	30	16	16	19	19	7	7
Taiwan	22	32	18	25	14	19	18	22	11	13
Netherlands	25	18	25	18	27	20	16	12	6	5
Micronesia, Federated States of	4	7	6	8	2	3	11	13	1	1
Nauru	0	0	0	0	2	3	11	13	8	8
Other	134	161	134	185	128	197	115	163	58	79
<b>Total</b>	<b>663</b>	<b>624</b>	<b>674</b>	<b>688</b>	<b>684</b>	<b>760</b>	<b>580</b>	<b>589</b>	<b>326</b>	<b>343</b>

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

Most imports originated from China, the USA, Vietnam, Papua New Guinea, Korea, and Japan. The majority of imported products from China, the USA, and Vietnam were non-food products (mostly fish/prawn feed and other derivatives). The Philippines mostly imported tuna and tuna-like species, and miscellaneous pelagics, from Papua New Guinea, Korea, and Japan. In 2020, the Philippines imported 3% more canned tuna and skipjack tuna for processing than in 2019. However, the import of frozen yellowfin tuna declined by 22% compared with 2019 due to falling demand for non-canned tuna,

particularly for Carbon Monoxide (CO) treated fillets and steaks in the US market<sup>30</sup>. Generally, in 2020, consumption of inexpensive and shelf-stable canned tuna increased worldwide and created brisk international trade. The non-canned tuna market, however, remained suppressed along with the catering trade due to the COVID-19 crisis.

Table 28. **IMPORT VOLUMES AND VALUES BY PRODUCT (1.000 tonnes and million EUR)**

Species	2017		2018		2019		2020		Jan-Jun 2021	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Tuna, skipjack	92	104	78	84	108	120	111	124	72	79
Mackerel	182	104	156	98	62	50	46	37	16	13
Tuna, yellowfin	41	61	61	81	57	80	44	53	29	29
Salmon	4	11	17	27	19	31	16	23	11	15
Fishmeal	39	16	21	10	12	8	11	9	11	7
Freshwater catfish	0	0	25	34	26	37	10	14	10	12
Tuna, miscellaneous	3	4	6	11	15	24	8	15	4	8
Seaweed and other algae	0	0	2	2	3	2	3	3	1	1
Shrimp, miscellaneous	4	20	5	25	5	22	2	8	2	5
Tuna, bigeye	1	1	1	2	2	3	2	2	0	0
Other	297	303	302	314	378	383	328	301	171	174
<b>Total</b>	<b>663</b>	<b>624</b>	<b>674</b>	<b>688</b>	<b>684</b>	<b>760</b>	<b>580</b>	<b>589</b>	<b>326</b>	<b>343</b>

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

#### 4.4 Trade with the EU

The EU is the Philippines' fourth largest trading partner, accounting for the 8,4% of the country's total trade in 2020 (after China, the USA, and Japan). The Philippines is the EU's 37th largest trading partner globally, accounting for 0,3% of the EU's total trade. The Philippines have been a member of the WTO since 1995 and enjoys enhanced trade preferences with the EU under the EU's Generalised Scheme of Preferences plus (GSP+)<sup>31</sup>. EU exports of fisheries and aquaculture products to the Philippines demonstrated an upward trend from 2017 to 2019, increasing from 5.717 to 10.518 tonnes. However, in 2020, export volumes decreased and were 41% lower than the year before, at 6.170 tonnes. Between 2017 and 2019, EU exports to the Philippines more than doubled in value, from 6,1 million to 15,4 million EUR. Due to low export volumes in 2020, this decreased to 9,4 million EUR for that year.

<sup>30</sup> <https://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1207658/>

<sup>31</sup> <https://ec.europa.eu/trade/policy/countries-and-regions/countries/philippines/>

Table 29. **EU EXPORT TO THE PHILIPPINES BY SPECIES (volume in tonnes, value in 1.000 EUR)**

	2017		2018		2019		2020		Jan-Jun 2021	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Fishmeal	956	1.419	829	1.290	1.926	2.990	1.668	2.422	175	309
Salmon	652	598	1.881	2.131	781	1.246	957	1.682	484	1.207
Tuna, skipjack	44	57	563	659	2.331	3.393	433	842	2	26
Tuna, yellowfin	74	106	23	31	860	1.618	89	191	24	119
Anchovy	40	505	34	414	32	398	18	242	8	116
Fish oil	0	0	35	48	48	74	15	26	0	0
Surimi	2	20	4	25	2	17	14	31	1	8
Tuna, bigeye	12	16	2	2	711	830	14	12	0	0
Mussel <i>Mytilus</i> spp.	1	4	16	39	16	41	8	17	8	20
Cod	1	8	3	22	4	43	5	47	3	22
Other	3.935	3.328	4.156	4.996	3.806	4.757	2.951	3.944	2.709	3.851
<b>Total</b>	<b>5.717</b>	<b>6.061</b>	<b>7.544</b>	<b>9.657</b>	<b>10.518</b>	<b>15.406</b>	<b>6.170</b>	<b>9.455</b>	<b>3.416</b>	<b>5.679</b>

Source: EUMOFA elaboration of EUROSTAT

Most of the exported products are fishmeal, salmon, and tuna and tuna-like species. The majority of exports come from Denmark (35%), Netherlands (14%), France (14%), Spain (14%), and Belgium (6%). Fishmeal mainly comes from Denmark and France. Fishmeal volumes from Denmark more than doubled from 2018 to 2019, from 728 to 1.826 tonnes. In 2020, total fishmeal export volumes from the EU amounted to 1.668 tonnes, with a value of 2,4 million EUR. Salmon (frozen and fillets) mainly originated from Denmark, the Netherlands, and France, while tuna and tuna-like species came from Spain and other Mediterranean countries, either frozen or prepared/preserved. Annual EU imports from the Philippines were between 60-70 thousand tonnes between 2017 and 2019, and increased to 67 thousand tonnes in 2020, up 11% compared with the previous year. Value remained stable and was around 226 million EUR, in 2020.

Table 30. **EU IMPORTS FROM THE PHILIPPINES BY TOP SPECIES (volume in tonnes, value in 1.000 EUR)**

	2017		2018		2019		2020		Jan-Jun 2021	
	Volume	Value								
Tuna, skipjack	28.892	106.943	33.031	126.866	40.580	151.651	34.249	123.409	25.551	92.560
Tuna, yellowfin	27.362	83.095	21.930	70.136	12.324	40.406	25.998	77.089	6.450	22.718
Tuna, miscellaneous	4.453	15.948	3.634	13.903	3.229	11.350	3.009	9.992	1.843	5.136
Sardine	557	1.411	51	120	286	680	275	652	222	540
Octopus	692	2.875	1.544	7.137	651	3.169	268	1.120	255	966
Shrimp, warmwater	172	1.728	136	1.324	101	1.091	162	1.750	164	1.608
Seaweed and other algae	0,03	0,2	0,2	6	0,1	1	93	765	2	29
Shrimp, miscellaneous	51	292	24	162	60	336	68	447	62	356
Crab	23	616	29	857	50	1.072	13	216	0	10
Herring	0	0	0	0	0	0	7	37	0,04	0,4
Other	2.296	11.163	3.167	15.294	3.234	17.059	3.004	10.965	1.618	10.824
<b>Total</b>	<b>64.499</b>	<b>224.072</b>	<b>63.546</b>	<b>235.805</b>	<b>60.516</b>	<b>226.815</b>	<b>67.147</b>	<b>226.442</b>	<b>36.168</b>	<b>134.747</b>

Source: EUMOFA elaboration of EUROSTAT

In 2020, 90% of the products imported from the Philippines were skipjack and yellowfin tuna, and tuna-like species. The majority of skipjack tuna was imported in a prepared/preserved state, with the main importers being Germany (57%), the Netherlands (15%), Poland (6%), and Spain (5%). Yellowfin tuna was mostly frozen, and distributed to Italy, Spain, France, and Portugal. Tuna, shrimp, and seaweed are the major commodities imported to the EU from the Philippines. In 2020, shrimp was mainly imported to France, the Netherlands, and Germany, while seaweed was mainly imported to the UK and Germany.

#### 4.5 Processing and canning industry

Fish catches are mostly sold in local markets, while shrimps are mainly shipped to Manila or other urban areas. The majority of the catch is consumed fresh or chilled (70%), while the rest is processed (30%). The bulk of cured fishery products are consumed locally. Drying is the usual form of processing, especially for small fish caught by commercial trawlers. Smoking and salting are also used but to a lesser extent<sup>32</sup>.

While dried or smoked fish is usually consumed locally, canned fish has had huge success as an exported product. Canned products, particularly tuna, are consumed locally in smaller quantities (8-10%) compared with the volume that is exported (90%). The export of canned products is mostly to the EU, the USA, the Middle East, Japan, and Australia. Philippine fishing and canning companies have local canneries, but fish is also canned in Papua New Guinea, Indonesia, and Vietnam<sup>33</sup>. Bycatch from trawlers forms an important component of aquaculture feeds for high-value species, and is also used in fishmeal.

Tuna is currently one of the Philippines' largest canned seafood exports, with a reported value of almost EUR 310 million in 2020. Some of the huge canners in the industry are the General Tuna Corporation (Century Pacific Food, Inc.), Alliance Select Food International, Inc., Celebes Canning Corporation, Philbest Canning Corporation, Ocean Canning Corporation, and Seatrade Canning Corporation. These companies export around 90% of their total production to countries including European countries (Germany, the UK, the Netherlands, and Spain), the United States, and Japan. The Philippines is an important player in the canned fish trade in Europe. In 2019, the Philippines exported 37.308 tonnes of canned tuna and 600 tonnes of canned sardines to Europe. The bulk of canned tuna exports from the Philippines are brined or in oil. Some of the products are also exported in tuna pouches or as raw material for the canning industry in the form of frozen tuna loins. Skipjack and yellowfin tuna are the species most commonly used in the canning sector. The Philippines is currently under the Generalised System of Preference Plus (GSP+), which allows the country to export over 6,000 products to Europe at zero or reduced tariff, with a zero tariff for the export of canned fish. Since the successful application of the Philippines to the GSP+ in 2014, the country has enjoyed greater access to the EU, leading to an increase in exports of canned fish. The European Union is currently negotiating a free trade agreement with the Philippines.

#### 4.6 Challenges and opportunities

70% of the Philippines' fish stocks are considered overfished, resulting in low fisheries production since 2010<sup>34</sup>. One of the main challenges for the Philippines fisheries is illegal, unreported, and unregulated (IUU) fishing. In 2019, the Philippines introduced a new fisheries management framework to prevent IUU, however, the program has seen delays in its implementation, with only six out of twelve scientific advisory groups having been established. Experts relate this to the COVID-19 pandemic, which saw the reallocation of state funds and a lack of action from local mayors<sup>35</sup>. Furthermore, the Philippines domestic and international markets are faced with inadequate transport services, resulting in high costs of fish products and raw materials. The country must also contend with outdated facilities, low marketability, unstable market prices, export-import procedures, and difficulty complying with regulatory requirements for food quality and safety such as HACCP<sup>36</sup>, as well as standards from the USA and the EU, among others<sup>37</sup>. To address the challenges facing the Philippines' fisheries trade, the Comprehensive Post-harvest, Marketing and Ancillary Industries Plan (CPHMAIP) 2018-2022, adopted the trade and marketing goal of the Comprehensive National Fisheries Development Plan of the Philippines (CNFID 2016-2020), which is to increase the quantity and value of traded fish and fishery products for domestic and international markets. The CNFID 2016-2020 focuses on enhanced marketing strategies in regions with low fish sufficiency, increased participation in local and international trade fairs, improved quality, and improved compliance with international standards on food safety, traceability, and packaging.

<sup>32</sup> <http://www.seafdec.org/fisheries-country-profile-philippines/>

<sup>33</sup> <https://mb.com.ph/2021/05/28/ph-tuna-and-canning-companies-eye-expansion-in-india/>

<sup>34</sup> <https://www.sunstar.com.ph/article/1812928/LOILO/Local-News/USAid-70-of-Philippine-fishing-grounds-overfished>

<sup>35</sup> <https://news.mongabay.com/2021/07/philippines-banks-on-new-fisheries-management-system-but-rollout-is-rocky/>

<sup>36</sup> Hazard Analysis and Critical Control Point (HACCP)

<sup>37</sup> <http://www.seafdec.org/country-fisheries-trade-philippines/>

## 5. Case study – Eurobarometer survey on fisheries and aquaculture products consumption in the EU

The latest Eurobarometer survey on EU consumer habits regarding fisheries and aquaculture products (FAPs)<sup>38</sup> shows that the COVID-19 crisis did not seem to have significantly affected the consumption of seafood within the EU, although a slight decrease is observed since 2018, especially for some of the biggest consumers. Quality and price remain the most important purchasing factors, while demand for more consumer information has increased.

This survey was carried out by the Kantar network in the 27 EU Member States between 16 March and 12 April 2021. In total, 26.669 respondents from different social and demographic groups were interviewed in their mother tongue. This survey was commissioned by the European Commission, Directorate General for Maritime Affairs and Fisheries (DG MARE). This Special Eurobarometer survey is the third on this topic, repeating some questions first asked in a survey conducted in June 2016, and subsequently in a survey conducted in July 2018. It aims to improve understanding of the EU internal market for FAPs.

### 5.1 Frequency of consumption

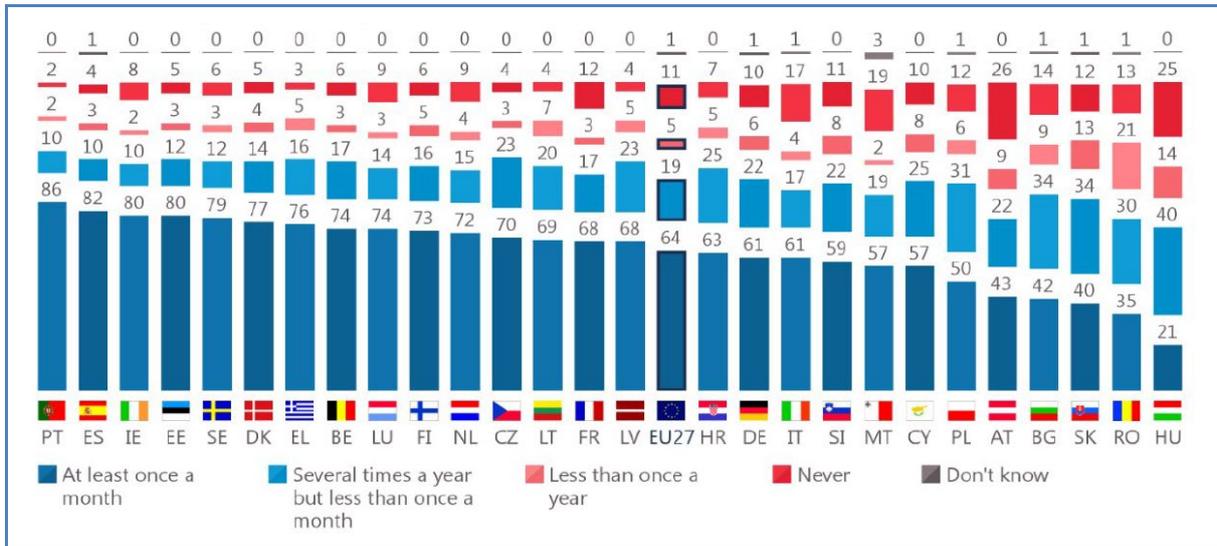
One of the main findings of the Eurobarometer survey is that most Europeans still eat FAPs regularly:

- Nearly two-thirds of Europeans (64%) eat fishery or aquaculture products at home at least once a month and 7% at least once a week. Analysis at country level shows that in 22 out of 27 Member States, the majority of respondents buy FAPs at least once a month.
- Fewer respondents reported they eat FAPs in restaurants on a regular basis, with under a quarter (21%) eating these products in restaurants and other food outlets at least once a month. This proportion has fallen in 24 EU Member States since 2018, probably linked with the COVID-19 outbreak.
- The share of Europeans who eat fishery or aquaculture products at home (-6 pp<sup>39</sup> since 2018) and at restaurants and other food outlets (-11 pp. since 2018) at least once a month has decreased since 2018.
- Logically, respondents from coastal countries are more likely to eat FAPs at least once a month, compared with those from land-locked countries. For example, respondents in Hungary (21%) are much less likely than those in Portugal (86%) to eat these products at least once a month.

<sup>38</sup> <https://europa.eu/eurobarometer/surveys/detail/2271>

<sup>39</sup> Percentage points.

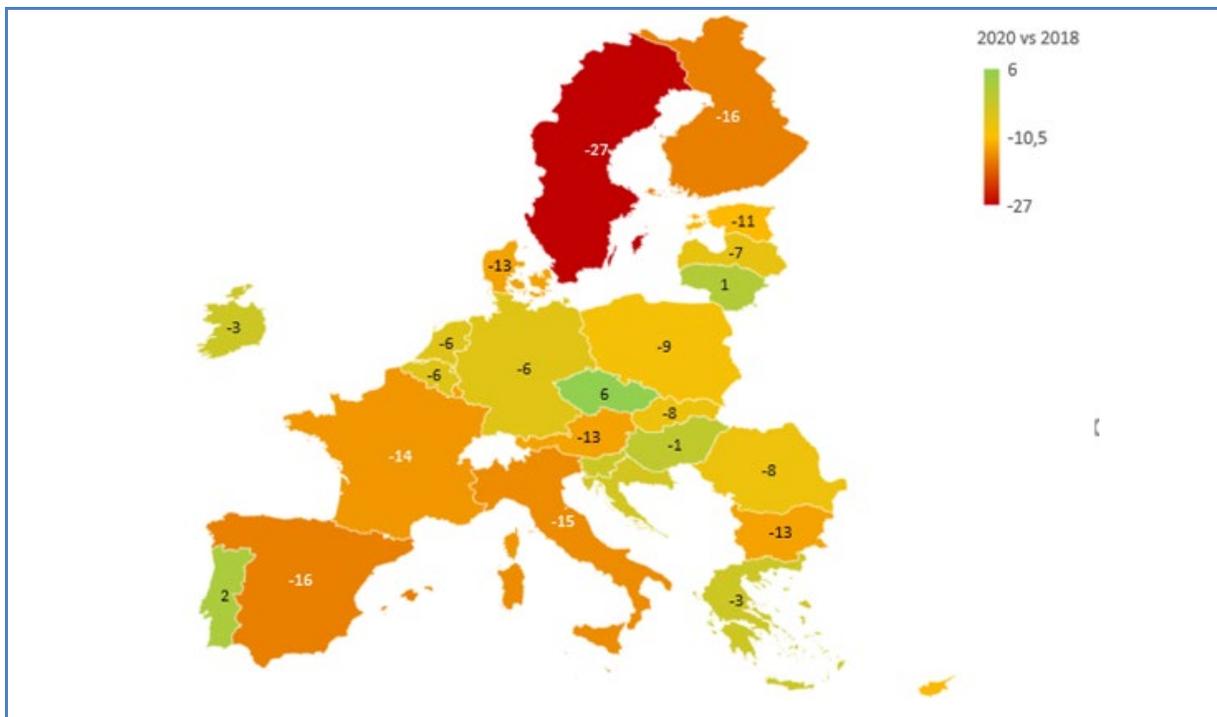
Figure 51. **HOW FREQUENTLY (%) RESPONDENTS EAT FISHERIES AND AQUACULTURE PRODUCTS?**



Source: Eurobarometer.

In terms of evolutions since 2018, the share of respondents who say they eat fishery or aquaculture products at home at least once a month has decreased in 22 EU Member States, and by at least 10 pp. in eight Member States, most significantly in Cyprus (57%, -22 pp. since 2018), Romania (35%, -20 pp.) and Bulgaria (42%, -16 pp.). Conversely, it has increased in five Member States, particularly in Czechia (70%, +23 pp.), Ireland (80%, +19 pp.), and Belgium (74%, +9 pp.). At EU level, it was a decrease of 6 pp.

Figure 52. **HOW FREQUENTLY (%) RESPONDENTS EAT FISHERIES OR AQUACULTURE PRODUCTS AT LEAST ONCE A MONTH AND EVOLUTION AGAINST 2018 STUDY?**



Source: EUMOFA based on Eurobarometer data.

Respondents who buy fishery or aquaculture products at least several times a year were asked where they have bought fishery products during the last 12 months. They were able to choose multiple responses from a list of five:

- Close to eight in ten respondents (79%, +2 pp. since 2018) buy fishery products at the grocery store, supermarket or hypermarket, far ahead of any other place of purchase.
- More than four in ten (43%, +1 pp.) buy these products at a fishmonger, a fishmonger's stall in a market hall or a specialist store.
- At least one-tenth of respondents buy fishery products at a street market (15%, +1 pp.), at a fish farm, at the fish harbour/fish auction, or from the fisherman (10%, +2 pp.).
- Finally, very few respondents (2%, +1 pp.) buy these products online

It should be noted that respondents who prefer wild fishery and aquaculture products (50%) were more likely than those who prefer farmed products (39%) to say they buy fishery products at a fishmonger, a fishmonger's stall in a market hall, or at a specialist store.

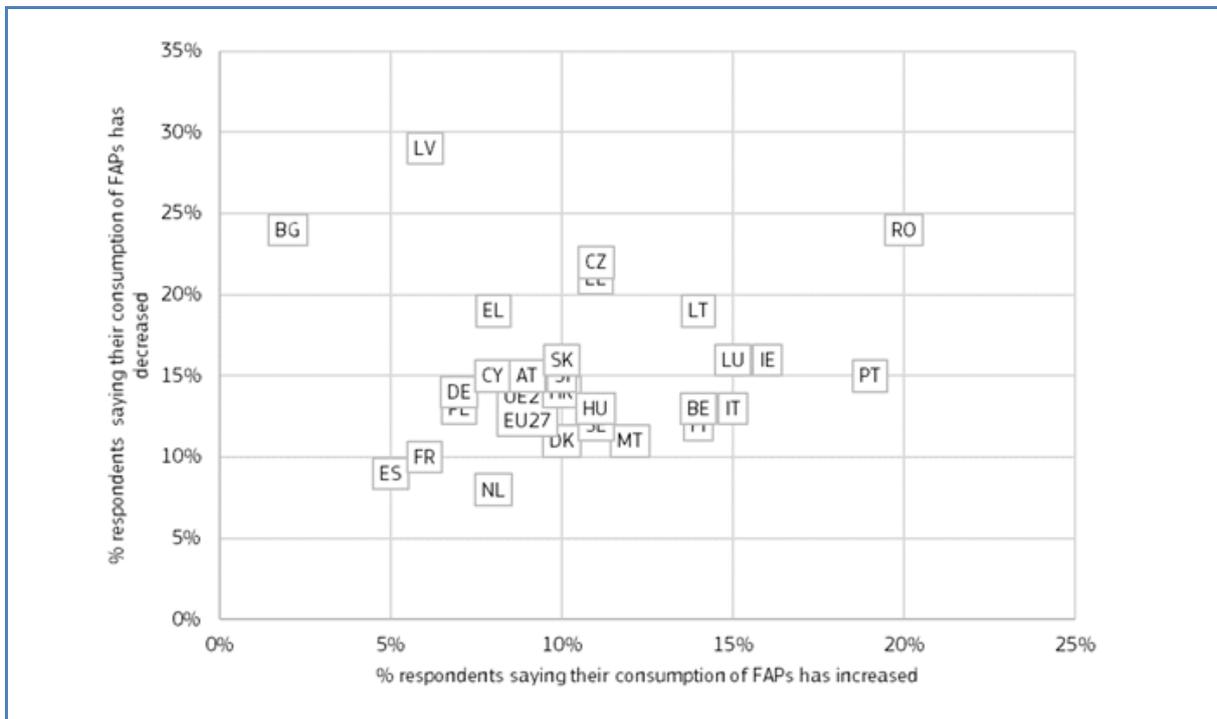
## 5.2 Change in consumption of FAPs because of COVID-19

Although the vast majority of respondents (at least 80% for all product categories) say their consumption of FAPs "remained about the same", almost one-fifth of Europeans changed their consumption of fishery and aquaculture products as a result of the COVID-19 pandemic (increasing or decreasing).

Over a third of respondents whose consumption of fishery or aquaculture products increased say it is because they are now more health-conscious (40%) or because they have changed their diet (35%). On the other hand, those who decreased their consumption of fishery or aquaculture products mostly did so because of fishery products becoming more expensive (33%), because of a change in their financial circumstances (25%), or because they have replaced fishery products with other food products (21%). In terms of socio-demographic differences, respondents' gender, age, and time spent in full-time education did not appear to significantly influence changes in their consumption of fishery and aquaculture products as a result of the COVID-19 pandemic. On the other hand, respondents who have difficulties paying bills most of the time are much more likely to have seen their consumption of fishery and aquaculture products decrease.

Among EU countries, Romanian respondents were the most affected, with 44% of respondents saying that their consumption of FAPs had either increased (20%) or decreased (24%). Other countries that were relatively significantly impacted were Latvia, Portugal, Lithuania, and Czechia (mostly due to decreasing consumption, except for Portugal). Bulgaria was, after Latvia, the country where the largest share of respondents said their consumption of FAPs decreased. On another hand, Spain, Italy, and the Netherlands were the countries where the consumption of FAPs was the least affected by the pandemic.

Figure 53. **VISUALISATION OF THE EU COUNTRIES WHERE THE CONSUMPTION OF FAP WAS THE MOST AND THE LEAST AFFECTED BY THE PANDEMIC**



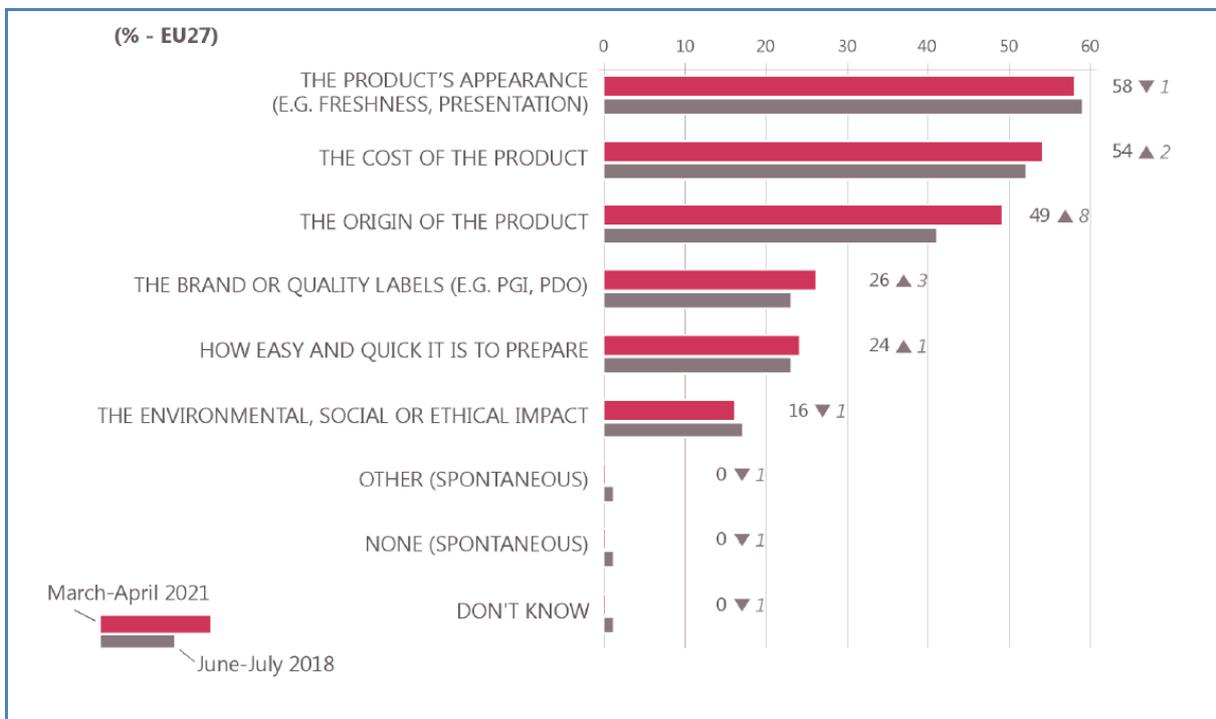
Source: EUMOFA based on Eurobarometer data.

### 5.3 Preferences regarding fishery and aquaculture products

The survey also investigated the most important aspects when buying FAPs. Respondents who buy fishery or aquaculture products at least several times a year said that the product’s appearance (e.g. freshness, presentation) (58%), and the cost of the product (54%) were the most important considerations when buying FAPs. However, the origin of the product was the third most mentioned reason and has gained eight percentage points since 2018. Brand or quality labels also increased in importance for consumers, whereas environmental, social, or ethical aspects lost 1 pp. since 2016.

When comparing EU countries, it appeared that brand or quality labels (e.g. PGI, PDO) were often mentioned in Sweden (53% of respondents), Germany (46%), and Austria (40%), and were mentioned least in Latvia (7%), Lithuania (7%), and Estonia (10%). Furthermore, the environmental, social, or ethical impact of a product was cited most in Sweden (33%), Luxembourg (32%), and Ireland (30%), compared with 5% in Latvia, 6% in Bulgaria, and 7% in both Hungary and Lithuania.

Figure 54. **MOST IMPORTANT ASPECTS WHEN RESPONDENTS BUY FISHERIES AND AQUACULTURE PRODUCTS (max. 3 answers) (% -EU)**



Source: Eurobarometer data.

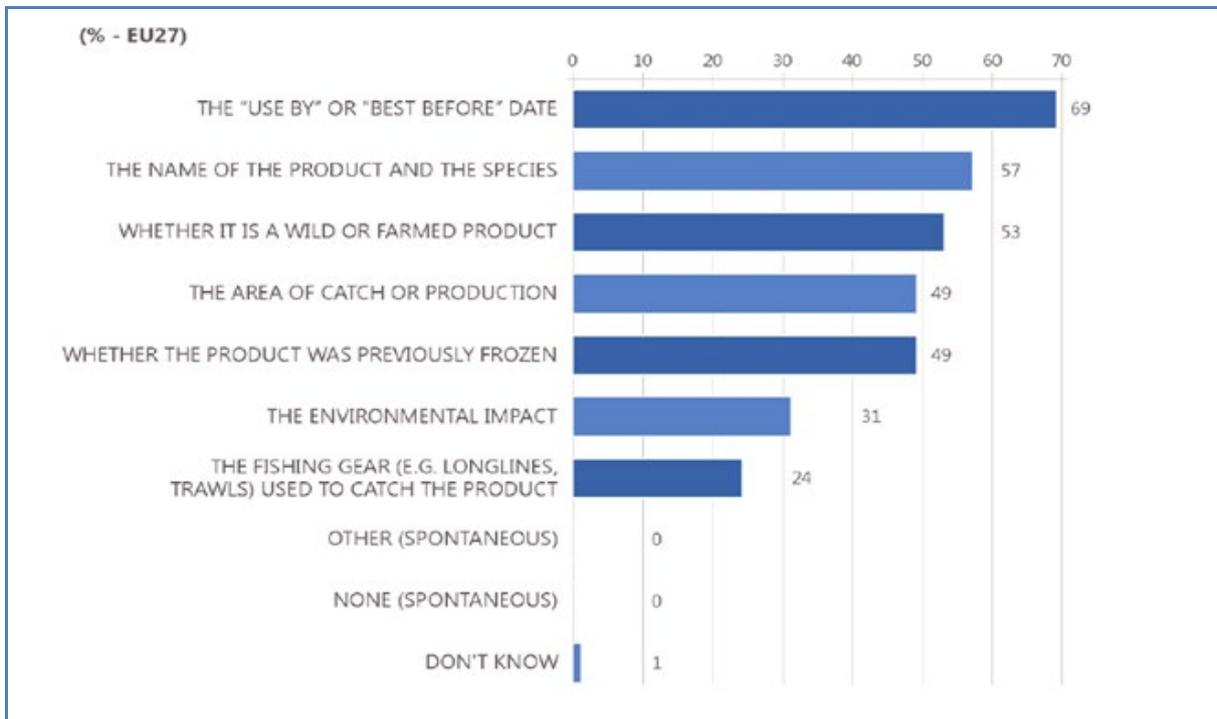
Regarding preferences towards production methods, almost a third of respondents eating and/or buying fishery and aquaculture products at least several times a year prefer wild products (32%, -3 pp.) or have no preference regarding wild or farmed products (30%, -2 pp.), while 7% (-2 pp.) prefer farmed products. However, the proportion of respondents who hold a strong preference for either wild or farmed products has decreased in most Member States. At the same time, consumers are now more likely to say that it depends on the type of product, or that they do not know if the products they buy or eat are wild or farmed. In addition, respondents who prefer wild products are more likely than those who prefer farmed products to mention the product's appearance (62% compared with 50%) and the origin of the product (62% compared with 48%) as important aspects when buying fishery and aquaculture products.

## 5.4 Consumer preferences towards information accompanying fishery and aquaculture products

The survey also investigated what consumers think about the information accompanying fishery and aquaculture products. It appeared that almost 70% of those who eat and/or buy fishery and aquaculture products at least several times a year consider that the "use by" or "best before" date should be mentioned on the label of fresh, frozen, smoked, and dried fishery products, far ahead of any other information. The majority of respondents also mention the name of the product and the species (57%), and whether it is a wild or farmed product (53%).

Around three-quarters of respondents considered that the date of catch or production should be mentioned on the label for all fishery and aquaculture products, a long way ahead of environmental information (44%), which nonetheless has gained five percentage points since 2018. On this aspect, slightly more than half of the respondents cited the environmental impact in Sweden (51%), ahead of Portugal (47%), and Ireland, Belgium, and Luxembourg (44% each). In contrast, only 9% did so in Bulgaria, 11% in Latvia, and 14% in Croatia.

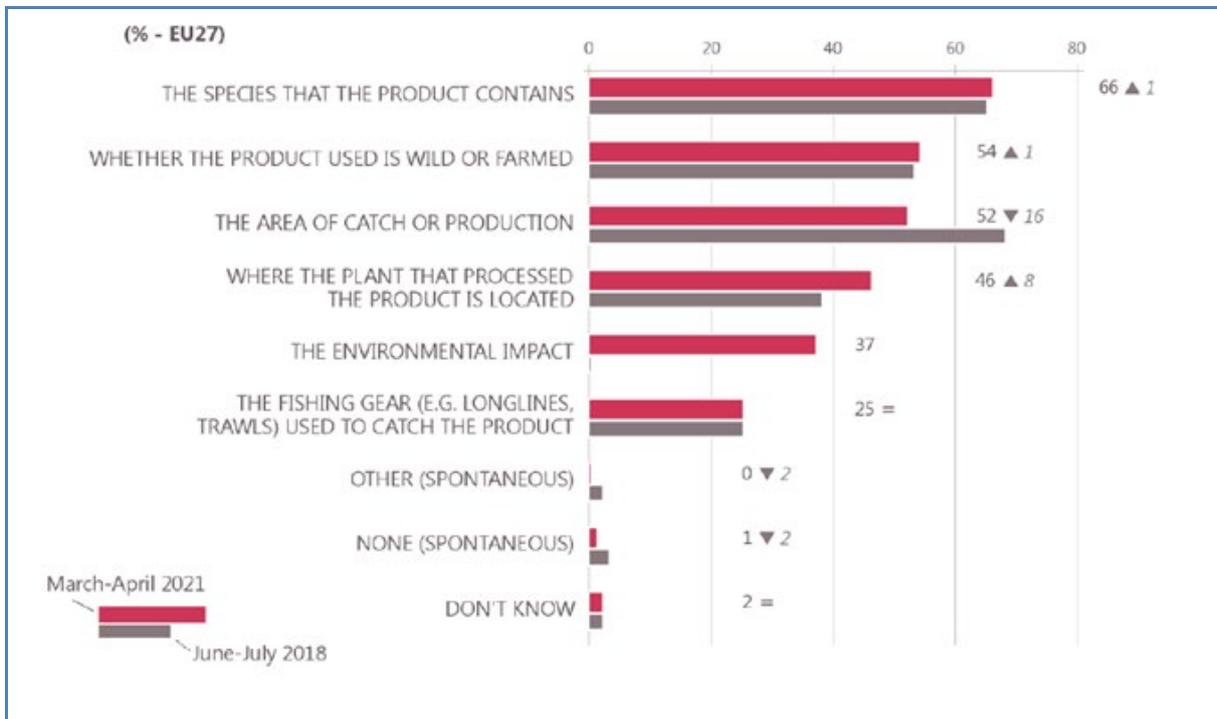
Figure 55. **MOST IMPORTANT INFORMATION THAT SHOULD BE MENTIONED ON THE LABEL OF FRESH, FROZEN, SMOKED AND DRIED FISHERY PRODUCTS**



Source: Eurobarometer data.

Concerning canned or prepared products, two-thirds of respondents think that the species contained in the product should be mentioned on the label, ahead of whether the product used is wild or farmed (54%), and the area of catch or production (52%). Moreover, there has been a 16-pp. decrease in respondents saying that the area of catch or production should be mentioned on the label of these products and an 8-pp. increase for indicating the location of the processing plant.

Figure 56. **MOST IMPORTANT INFORMATION THAT SHOULD BE MENTIONED ON THE LABEL OF FRESH, FROZEN, SMOKED AND DRIED FISHERY PRODUCTS**



Source: Eurobarometer data.

## 6. Global highlights

**EU / Fisheries / Atlantic:** In London, in October, delegations of the European Union, the Faroe Islands, Greenland, Iceland, Norway, the Russian Federation, and the United Kingdom reached an agreement on management measures for mackerel, blue whiting, and Atlanto-Scandian herring in the Northeast Atlantic for 2022. All three stocks have a total allowable catch (TAC) for 2022 set according to the scientific advice provided by the International Council for Exploration of the Sea (ICES<sup>40</sup>).

**Data / Fisheries / EMFF:** A new website for Regional Coordination Groups (RCGs), funded with support from the European Maritime and Fisheries Fund, is available online. It offers information about the work of the RCGs, including details of their meetings, reports, and decisions. RCGs are the main hub for the regional coordination and cooperation of the different regions contributing to the fisheries Data Collection Framework. RCGs were set up to help develop and implement the methodology, quality assurance, and quality control procedures for collecting and processing data used to produce scientific advice<sup>41</sup>.

**GFCM / Mediterranean Sea:** The General Fisheries Commission for the Mediterranean (GFCM) has adopted its new 2030 Strategy for the Mediterranean and Black Seas at the end of the 44th annual session on 6 November 2021. An agreement was also reached on an ambitious package of measures translating strategy into concrete actions. The recommendations include important measures to improve fisheries management and control in the Adriatic and Black Seas, to better protect sensitive species and habitats, and to consolidate the monitoring and control framework, including combatting illegal, unreported, and unregulated (IUU) activities in both the Mediterranean and Black Seas. The European Union and the MS were granted a Compliance Award, recognising their commitment to observing and implementing all GFCM decisions and data submission requirements<sup>42</sup>.

**EU / COVID-19 / Food Security:** Following the COVID-19 crisis, the European Commission adopted a contingency plan that acknowledges the overall resilience of the EU food supply chain, identifies existing shortcomings, and puts forward actions to improve preparedness at EU level. To follow this, the Commission will establish a European Food Security Crisis preparedness and response Mechanism (EFSCM), a group of food supply chain experts coordinated by the Commission to exchange data and practices, and strengthen coordination. The EFSCM will rely on a group of experts, made up of representatives from Member States and some non-EU countries alongside actors from all stages of the supply chain, and a set of rules of procedure governing its functioning. The group will meet periodically, and it will focus on specific activities and a set of actions to be completed between mid-2022 and 2024<sup>43</sup>.

**EU / Fleet / Report:** The 2021 Annual Economic Report on the EU Fishing Fleet confirms that in 2019, the fleet maintained overall profitability with a landed value of €6.3 billion, gross profits of €1.2 billion and net profits of €597 million in 2019. The good performance was the result of high average fish prices and the improved status of some important fish stocks. The report projects similar profitability levels for 2020, despite the effects of the COVID-19 pandemic on the fleet and fish markets. Due to the rise in fuel prices, a reduction in profits is expected for 2021, but the EU fleet is forecast to end 2021 with positive margins overall. Sustainable fishing practices are helping to mitigate some of the impacts of the rising fuel prices<sup>44</sup>.

**UK / Processing / Seafood:** According to the newly released report entitled “UK fisheries statistics”, there were 348 fish-processing sites in the UK in 2020. In 2019, fish processing businesses had a turnover of around EUR 3,8 billion<sup>45</sup>.



<sup>40</sup> [https://ec.europa.eu/oceans-and-fisheries/news/north-east-atlantic-coastal-states-reach-agreement-mackerel-blue-whiting-and-atlanto-0\\_en](https://ec.europa.eu/oceans-and-fisheries/news/north-east-atlantic-coastal-states-reach-agreement-mackerel-blue-whiting-and-atlanto-0_en)

<sup>41</sup> [https://ec.europa.eu/oceans-and-fisheries/news/data-collection-fisheries-goes-online-2021-10-29\\_en](https://ec.europa.eu/oceans-and-fisheries/news/data-collection-fisheries-goes-online-2021-10-29_en)

<sup>42</sup> [https://ec.europa.eu/oceans-and-fisheries/news/new-strategy-sustainable-fisheries-and-aquaculture-mediterranean-and-black-sea-2021-11-08\\_en](https://ec.europa.eu/oceans-and-fisheries/news/new-strategy-sustainable-fisheries-and-aquaculture-mediterranean-and-black-sea-2021-11-08_en)

<sup>43</sup> [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_21\\_5903](https://ec.europa.eu/commission/presscorner/detail/en/ip_21_5903)

<sup>44</sup> [https://ec.europa.eu/oceans-and-fisheries/news/eu-fleet-maintains-good-profits-overall-mainly-thanks-sustainable-fishing-practices-and-management-2021-11-18\\_en](https://ec.europa.eu/oceans-and-fisheries/news/eu-fleet-maintains-good-profits-overall-mainly-thanks-sustainable-fishing-practices-and-management-2021-11-18_en)

<sup>45</sup> <https://researchbriefings.files.parliament.uk/documents/SN02788/SN02788.pdf>

## 7. Macroeconomic Context

### 7.1. Marine fuel

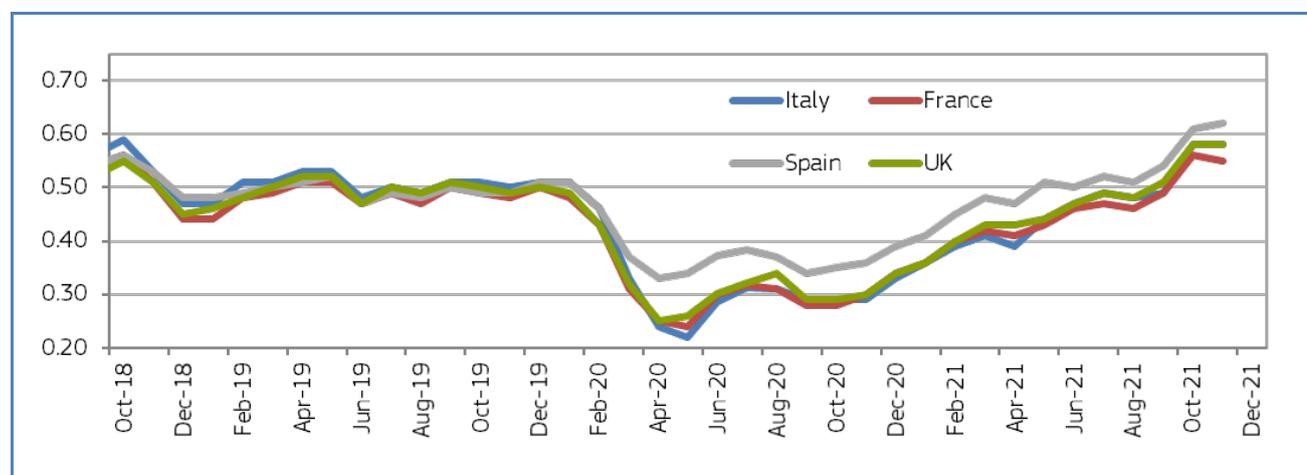
Average prices for marine fuel in **November 2021** ranged between 0,55 and 0,62 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Average prices remained the same compared with the previous month and increased by an average of 86,4% compared with the same month in 2020.

Table 31. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Nov 2021	Change from Oct 2021	Change from Nov 2020
France <i>(ports of Lorient and Boulogne)</i>	0,55	-2%	83%
Italy <i>(ports of Ancona and Livorno)</i>	0,58	0%	100%
Spain <i>(ports of A Coruña and Vigo)</i>	0,62	2%	72%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,58	0%	93%

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 4,4% in October 2021, up from 3,6% in September 2021. A year earlier, the rate was 0,3%.

**Inflation: lowest rates in October 2021, compared with September 2021.**



**Inflation: highest rates in October 2021, compared with September 2021.**



Table 32. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

	Oct 2019	Oct 2020	Sep 2021	Oct 2021	Change from Sep 2021		Change from Oct 2020	
<b>Food and non-alcoholic beverages</b>	106,90	109,01	111,17	111,55	↑	0,3%	↑	2,3%
<b>Fish and seafood</b>	110,78	112,39	114,09	115,29	↑	0,3%	↑	2,6%

Source: Eurostat.

### 7.3. Exchange rates

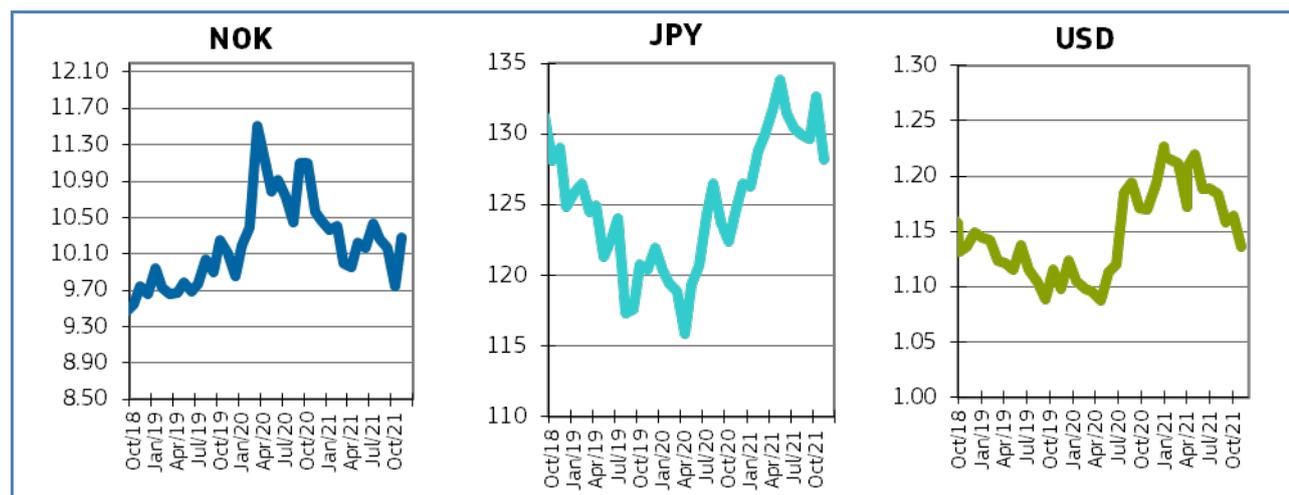
Table 33. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Nov 2019	Nov 2020	Oct 2021	Nov 2021
NOK	10,1000	10,5610	9,7495	10,2795
JPY	120,43	124,79	132,62	128,20
USD	1,0982	1,1930	1,1645	1,1363

Source: European Central Bank.

In November 2021, the euro appreciated against the Norwegian krone (5,4%) and US dollar (0,1%), and depreciated against the Japanese yen (3,3%), relative to the previous month. For the past six months, the euro has fluctuated around 1,17 against the US dollar. Compared with November 2020, the euro has appreciated 2,7% against the Japanese yen and depreciated 2,7% against the Norwegian krone and 4,8% against the US dollar.

Figure 58. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

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

**First sales:** EUR-Lex, DG MARE- European Commission **Consumption:** EUROPANEL, FAO, fishbase.org, NOAA.

**Case studies:** Eurobarometer,

**Global highlights:** DG Mare - European Commission, Department of Biological Sciences - Old Dominion University, FAO, Bureau of Fishery and Aquatic Resource of the Philippines, PSA, Eurostat, DG-Mare - European Commission, SEAFDEC, Manilla Bulletin, SunStar ILOILO, Mongabay News.

**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 an annex available on the EUMOFA website. Analyses are made at aggregated (main commercial species) level and according to the EU Electronic recording and reporting system (ERS).

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

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

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