



COVID-19

Overview on the fishery and aquaculture sector

Bulletin collection *May-September 2021*

In 2021, EUMOFA has released several monitoring reports with the aim to provide an overview on the fishery and aquaculture sector during the COVID-19 pandemic. The data and analyses provided within these reports are accurate to EUMOFA experts' best knowledge, however they do not aim to give complete coverage of the market, therefore it is recommended to use them as a mere indication of the ongoing trends at the time. This document provides an overview of what has happened in the European sea basins, highlighting the main factors that might have had an impact on the fisheries and aquaculture sector. Moreover, an appendix is provided which includes 15 annexes: each report contains weekly first-sale data for 15 products at place of sale level and weekly extra-EU imports data for 10 fresh products and 4 frozen tuna products.

Contents

Market developments of the EU fishery and aquaculture sector – May 2021	1
Overview on COVID-19 response measures taken	1
Weather.....	3
Fishing or market closures and openings	4
Total Allowable Catches uptake	5
Other highlights.....	6
Marine gasoil prices in May 2021.....	9
Annex.....	10
Market developments of the EU fishery and aquaculture sector – June 2021	13
Overview on COVID-19 response measures taken	13
Weather.....	15
Fishing or market closures and openings	16
Total Allowable Catches uptake	18
Other highlights.....	19
Marine gasoil prices in June 2021.....	22
Annex.....	23
Market developments of the EU fishery and aquaculture sector – July 2021	26
Overview on COVID-19 response measures taken	26
Weather.....	28
Fishing or market closures and openings	29
Total Allowable Catches uptake	30
Other highlights.....	31
Marine gasoil prices in July 2021	34
Annex.....	35
Market developments of the EU fishery and aquaculture sector – August 2021	39
Overview on COVID-19 response measures taken	39
Weather.....	41
Fishing or market closures and openings	42
Total Allowable Catches uptake	43
Other highlights.....	44
Marine gasoil prices in August 2021.....	47
Annex.....	48

Market developments of the EU fishery and aquaculture sector – September 2021	51
Overview on COVID-19 response measures taken	51
Weather.....	53
Fishing or market closures and openings	54
Total Allowable Catches uptake	55
Other highlights.....	56
Marine gasoil prices in September 2021	59
Annex.....	60
Appendix	63

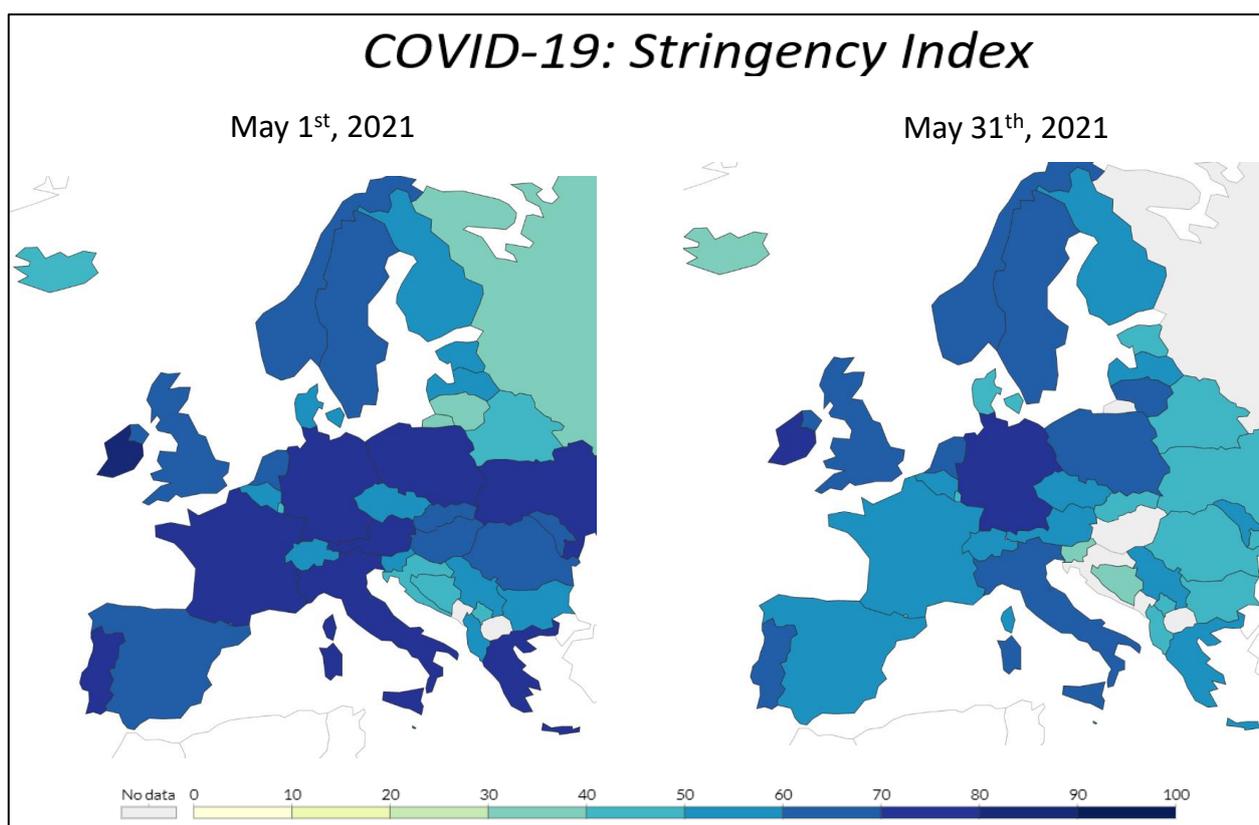
Market developments of the EU fishery and aquaculture sector – May 2021



Overview on COVID-19 response measures taken

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

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



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

According to the Stringency Index, most of the EU Member States have lightened the measures adopted to face the COVID-19 pandemic spread. Measures remained stable in some countries of Western and Central Europe (Belgium, Germany, Luxembourg, Switzerland and Czech Republic) and of Northern Europe (Sweden, Finland and Latvia).

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



Weather

The weather conditions in May 2021 appeared to be mainly similar to those recorded in the same month of the previous year in the Baltic Sea, Bay of Biscay and Iberian coast, and the Mediterranean Sea. Thus, as for the comparison, they do not seem to have had a major impact on the fishery activities. However, the adverse weather conditions in May 2021, also compared to the same month in 2020, affected the fishery activities in the Celtic and North Sea.

Figure 2 Weather conditions in May 2021 compared to May 2020

Sea basin	Impact: low, medium, high	Comments
Baltic Sea		The weather conditions were appropriate for fishing and similar to those recorded in the same period of 2020.
Bay of Biscay and Iberian coast		The weather was characterized by mutable conditions, similar to those recorded in the past year.
Celtic Sea		The weather was worse compared to last year. It was stormy (beginning of the month) and highly windy (around the third week of the month).
Mediterranean Sea		The weather was similar compared to the same month of 2020.
North Sea		The weather was worse compared to the last year. Particularly adverse weather conditions were registered on the French coast.



Fishing or market closures and openings

Baltic Sea

“Council Regulation (EU) No 2020/1579 of 29 October 2020 fixing for 2021 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Baltic Sea and amending Regulation (EU) 2020/123 as regards certain fishing opportunities in other waters” provides that “It shall be prohibited to fish with any type of fishing gear in subdivisions 25 and 26 from 1 May to 31 August (...), and in subdivision 24 from 15 May to 15 August.”² An exemption from the prohibition applies to EU fishing vessels of less than 12 meters in length that fish in waters less depth than 20 meters.

Black Sea

Romania confirmed the indefinitely ban on fishing and marketing of sturgeons, one of the most endangered fish worldwide. In the EU, the North-Western Black Sea is one of the few regions where naturally-reproducing sturgeon populations can still be found.³

Celtic Sea

No seasonal closures or closures due to the restrictions caused by COVID-19 were registered in the sea basin.

North Sea

The EU and the United Kingdom concluded the negotiations on an agreement in principle setting out catch limits for jointly managed fish stocks for 2021. The agreement establishes the total allowable catches for 75 shared fish stocks for 2021, as well as for some deep-sea stocks for 2021 and 2022. It provides also clarity on access limits for non-quota species⁴.

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

³ See the website of the Life project “Sustainable protection of lower Danube sturgeons by preventing and counteracting poaching and illegal wildlife trade” at <https://danube-sturgeons.org/the-project/> and <https://www.agerpres.ro/agerpres/2021/03/05/ministrul-mediului-pescuitul-sturionilor-interzis-pe-o-perioada-nedeterminata--672903>

⁴ More information on the agreement is available on Europa: https://ec.europa.eu/commission/presscorner/detail/en/statement_21_2828

Total Allowable Catches uptake

The following table reports the Total Allowable Catches (TAC) uptake per sea basin and for selected species consumed and/or utilized up to May 2021.⁵

Figure 3 TAC uptake

Sea basin	Species	TAC - Adapted quotas (Kg)	Total catches up to May 2021 (Kg)	Quota consumed up to May 2021
Baltic sea	Cod	6.550	1.442,73	22%
	European plaice	21.067	2.642,79	13%
	Herring	231.853	140.396,48	61%
	Norway lobster	12.382,44	2.311,97	19%
Bay of biscay and Iberian coast	Common sole	3.399	1.743,97	51%
	Hake	33.573	14.260,89	42%
	Norway lobster	4.360,40	1.551,54	36%
Black sea	Sprat (=Brisling)	11.475	1.223,38	11%
	Turbot	150	70,87	47%
Celtic sea	Common sole	3.741,14	1.322	35%
	Haddock	13.346	3.352,94	25%
	Monk	24.279,40	10.514,66	43%
	Norway lobster	13.684	3.187,68	23%
Mediterranean sea	Bluefin tuna	22.103,27	9.975,42	45%
	Swordfish	6.560,43	376,90	6%
North sea	Cod	13.288	2.261,72	17%
	Common sole	11.391	3.557,44	31%
	European plaice	100.231	10.142,94	10%
	Norway lobster	6.669	610,37	9%

⁵ Data provided by FIDES (Fisheries Data Exchange System).



Other highlights

Bay of Biscay and Iberian coast

According to the weekly first sales data available⁶, the top species in this sea basin in terms of value in May 2021, were the following.

Figure 4 Top species in terms of value in selected locations in the Bay of Biscay and Iberian coast in May 2021 (weeks 18-21)

Weekly first sales		Time frame: W18-21			
Volume (KG)	2019	2020	2021		Trend
Hake	2.536.155,50	2.681.079,19	2.182.573,85		
Lobster, Norway	306.497,30	257.932,70	359.174,20		
Monk	998.762,80	1.093.071,01	724.879,40		
Octopus	428.564,91	458.574,30	342.811,93		
Sardine	42.655,22	209.710,80	1.737.331,36		
Value (EUR)	2019	2020	2021		Trend
Hake	7.230.970,12	4.648.170,51	5.095.481,05		
Lobster, Norway	2.103.472,65	1.998.690,13	2.668.885,01		
Monk	3.323.421,98	2.618.329,37	2.227.916,70		
Octopus	1.840.334,82	1.772.489,17	1.785.870,18		
Sardine	123.369,17	465.552,31	1.978.041,41		
Price (EUR/kg)	2019	2020	2021		Trend
Hake	2,85	1,73	2,33		
Lobster, Norway	6,86	7,75	7,43		
Monk	3,33	2,40	3,07		
Octopus	4,29	3,87	5,21		
Sardine	2,89	2,22	1,14		

⁶ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France, Portugal and Spain. Thus, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 3 refer to, please see Annex below in this document.

Black sea

The following table reports monthly first sales data for May in Bulgaria⁷. It appears that volumes of clam and sprat in 2021 recovered from the drop reported in the same month of 2020.

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

Monthly first sales		Time frame: May			
Volume (KG)	2019	2020	2021	Trend	
Clam	21.839,00	1.760,00	76.563,00		
Sprat (=Brisling)	341.458,70	85.664,00	325.698,80		
Value (EUR)	2019	2020	2021	Trend	
Clam	63.062,79	6.299,21	176.030,37		
Sprat (=Brisling)	107.759,33	15.394,52	119.690,51		
Price (EUR/kg)	2019	2020	2021	Trend	
Clam	2,89	3,58	2,30		
Sprat (=Brisling)	0,32	0,18	0,37		

Further to the publication of the annual scientific advice for 2022 EU fishing limits for the Baltic Sea by the International Council for the Exploration of the Sea (ICES), a group of non-governmental organisations calls on the Commission to follow the scientific advice and implement radical measures. They include to propose Baltic fishing limits for 2022 that do not exceed scientific advice, as well as to implement an ecosystem-based approach to fisheries management in line with the objectives of the Common Fisheries Policy, and consider setting Baltic TACs at lower levels⁸.

⁷ The most recent monthly first sales data for April 2021 are available via the EUMOFA website and can be accessed [here](#).

⁸ For more information, visit: https://ccb.se/2021/05/eu-must-respond-to-baltic-sea-ecosystem-and-fisheries-crash-with-urgent-radical-measures/?utm_source=rss&utm_medium=rss&utm_campaign=eu-must-respond-to-baltic-sea-ecosystem-and-fisheries-crash-with-urgent-radical-measures

Mediterranean Sea

According to the weekly first sales data available⁹, the top species in this sea basin in terms of value in May 2021, were the following.

Figure 6 Top species in terms of value in selected locations in the Mediterranean Sea in May 2021 (weeks 18-21)

Weekly first sales		Time frame: W18-21			
Volume (KG)	2019	2020	2021	Trend	
Mackerel	116,10	1.260,60	1.073,70		
Sardine	139.750,00	34.341,81	27.567,31		
Swordfish	7.012,00	16.053,00	31.271,00		
Shrimp, miscellaneous	30.000,85	27.936,99	25.301,71		
Value (EUR)	2019	2020	2021	Trend	
Mackerel	446,74	5.421,52	7.466,30		
Sardine	52.247,81	37.709,26	25.082,25		
Swordfish	62.098,88	117.815,67	278.269,50		
Shrimp, miscellaneous	955.346,59	672.591,18	826.286,56		
Price (EUR)	2019	2020	2021	Trend	
Mackerel	3,85	4,30	6,95		
Sardine	0,37	1,10	0,91		
Swordfish	8,86	7,34	8,90		
Shrimp, miscellaneous	31,84	24,08	32,66		

The EU Commission approved EUR 500 million Greek support scheme under the State aid Temporary Framework¹⁰ to support food service companies affected by the coronavirus outbreak. The scheme, co-financed by the European Regional Development Fund (ERDF), is also directed to operators active in the fishery and aquaculture sector.

In Italy, the Decree Law n. 73 of 25 May 2021 (Urgent measures related to the COVID-19 emergency, for businesses, work, young people, health and territorial services¹¹), provided with a one-off allowance of EUR 950 in favor of self-employed professional fishers, including members of cooperatives.

⁹ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France and Spain. Therefore, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 4 refer to, please see Annex below in this document.

¹⁰ For more details, please visit https://ec.europa.eu/commission/presscorner/detail/en/IP_21_2444

¹¹ This and more Italian support schemes are available at <https://temi.camera.it/leg18/temi/agricoltura-e-pesca-nel-decreto-legge-n-18-2020-sostegno-economico-emergenza-covid-19.html>

North Sea

In the Greater North Sea¹², at the end of April 2021, several demonstrations were organised by French fishermen to contest the slow issuing of licenses by the UK government (in order to be allowed to fish in the 6-12 UK nm zone¹³). At the beginning of May, protest by French fishers at Jersey's main port ended, following talks aimed at resolving the dispute.¹⁴ As stated above, on 2 June, the EU and the United Kingdom concluded the negotiations on an agreement in principle for 2021 concerning fisheries in UK waters.

Marine gasoil prices in May 2021

Price of gasoil¹⁵ in the monitored sea basins showed increases between April and May 2021.

Figure 7 Marine gasoil prices

Sea basin	2021				April-May %
	March	April	May		
Baltic Sea	0,41 €	0,40 €	0,42 €	↑	5%
Bay of Biscay and Iberia	0,45 €	0,44 €	0,45 €	↑	4%
Celtic Sea	0,41 €	0,41 €	0,43 €	↑	5%
Mediterranean Sea	0,41 €	0,41 €	0,43 €	↑	6%
North Sea	0,39 €	0,39 €	0,41 €	↑	5%

¹² According to ICES, the Greater North Sea ecoregion includes the North Sea, English Channel, Skagerrak, and Kattegat. See details at: https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2018/2018/GreaterNorthSeaEcoregion_EcosystemOverview.pdf

¹³ "nm" stands for nautical miles.

¹⁴ For more information, please visit <https://www.bbc.com/news/uk-57011376>

¹⁵ Data collected from Mabux: Marine bunker exchange and aggregated on a monthly basis.

Annex

Bay of Biscay and Iberian coast

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

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

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

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

Market developments of the EU fishery and aquaculture sector - May 2021

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

MCS Sardine		
Product	Port	Year
European pilchard(=Sardine), whole	ES - Barbate de Franco	2019-2020-2021
	ES - Isla Cristina	
Sardine, whole, size 1	FR - Saint-Guérolé	2019
Sardine, whole, size 2	PT - Matosinhos	2021
	PT - Peniche	
	PT - Portimao	
	PT - Sesimbra	
Sardine, whole, size 3	PT - Matosinhos	
	PT - Olhão	
	PT - Sesimbra	

Mediterranean Sea

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

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

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

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

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

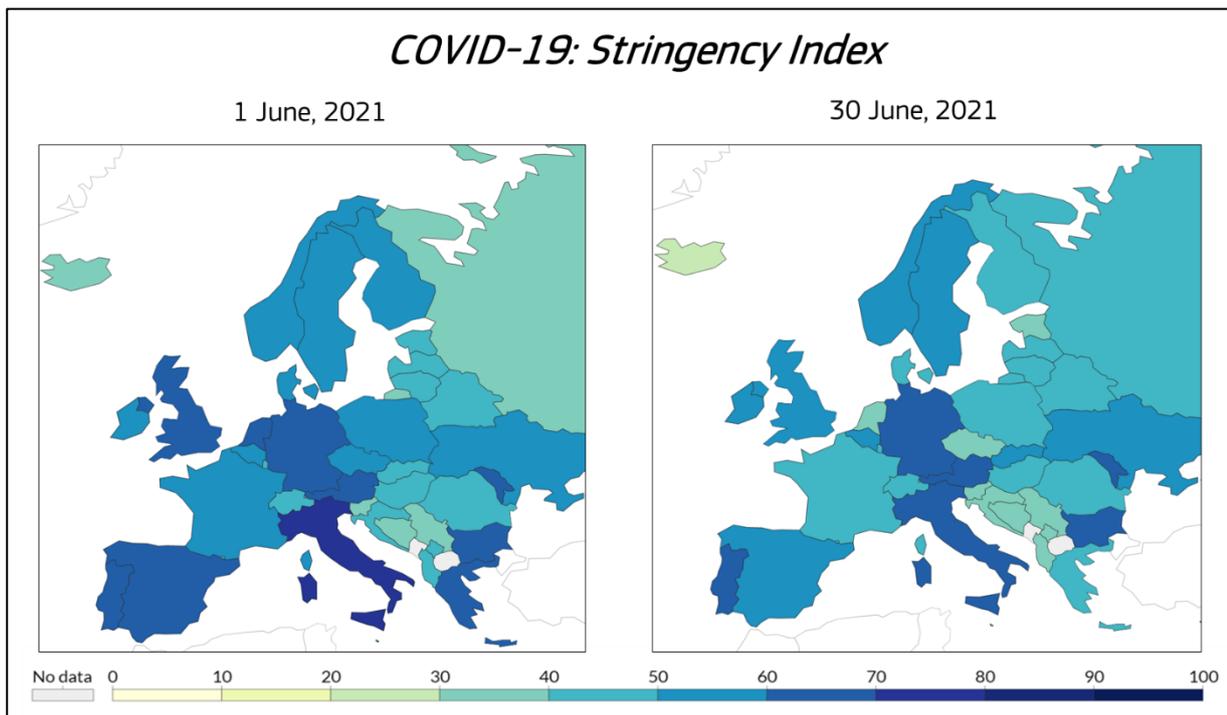
Market developments of the EU fishery and aquaculture sector – June 2021



Overview on COVID-19 response measures taken

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

Figure 8 - Response measures undertaken by countries in the European sea basins



Source: Stringency Index. Data published by: Thomas Hale, Noam Angrist, Rafael Goldszmidt, Beatriz Kira, Anna Petherick, Toby Phillips, Samuel Webster, Emily Cameron-Blake, Laura Hallas, Saptarshi Majumdar, and Helen Tatlow. (2021). "A global panel database of pandemic policies (Oxford COVID-19 Government Response Tracker)." *Nature Human Behaviour*. <https://doi.org/10.1038/s41562-021-01079-8>.¹⁶

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

¹⁶ Map available at: <https://www.bsg.ox.ac.uk/research/research-projects/oxford-covid-19-government-response-tracker>



Weather

The weather conditions in June 2021 appeared to be mainly similar to those recorded in the same month of the previous year. They do not seem to have had a major impact on the fishery activities.

Figure 9 Weather conditions in June 2021 compared with June 2020

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



Fishing or market closures and openings

Baltic Sea

As for May 2021, the “Council Regulation (EU) No 2020/1579 of 29 October 2020 fixing for 2021 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Baltic Sea and amending Regulation (EU) 2020/123 as regards certain fishing opportunities in other waters” provides that in June 2021 it shall be prohibited to fish with any type of fishing gear in subdivisions 24, 25, and 26. An exemption from the prohibition applies to EU fishing vessels of less than 12 meters in length operating in waters with depth than 20 meters¹⁷.

Black Sea

On 23 June, the European Parliament adopted a resolution on the challenges and opportunities for the fishing sector in the Black Sea.¹⁸ This underlined the need to further strengthen cooperation among the littoral Black Sea countries with a view to efficiently managing fish stocks and meeting challenges, ensuring an appropriate balance among available natural resources, environmental safety, and the maintenance of the fleet capacity of all Black Sea littoral countries. The resolution also focused on trade aspects, including the increase of awareness about local consumption and the positive effects for the local economy deriving from sustainable fishing and aquaculture, the promotion of more tailor-made approaches and policies on the small-scale fishing vessels segment, and the possibility to introduce designations of origin for Black Sea products.

Bay of Biscay and Iberian Coast

On 18 June 2021, the International Council for the Exploration of the Sea (ICES) published a new Advice on fishing opportunities, catch, and effort about the Bay of Biscay and the Iberian Coast. The Advice, which concerns Horse mackerel (*Trachurus trachurus*) in Division 9.a (Atlantic Iberian waters), stated that, when the Maximum sustainable yield approach is applied, catches in 2022 should be no more than 143.505 tonnes.¹⁹

¹⁷ Council Regulation (EU) 2020/1579 of 29 October 2020: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2020.362.01.0003.01.ENG

¹⁸ European Parliament resolution of 23 June 2021 on the challenges and opportunities for the fishing sector in the Black Sea (2019/2159(INI)): https://www.europarl.europa.eu/doceo/document/TA-9-2021-0307_EN.html

¹⁹ The ICES Advice is available at: <https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2021/2021/hom.27.9a.pdf>

Celtic Sea

Following the conclusion of negotiations between the United Kingdom and the European Union on catch limits for shared fish stocks for 2021, the Marine Management Organisation (MMO) provided an update on proposed changes to Celtic Sea Conservation technical measures. Proposed new measures concern all demersal otter trawls and seines in the Celtic Sea mixed fisheries; they are mainly aimed at further reducing unwanted catches of cod and whiting²⁰.

Mediterranean Sea

The Directorial Decree number 168451 of 13 April 2021 “Bluefin tuna fishing campaign – 2021” published in the Official Journal of the Italian Republic no. 140 of 14 June 2021 established the 2021 bluefin tuna fishing campaign. The decree provided that the total quota of 4.745.34 tonnes, definitively assigned to Italy, for the campaign fishing 2021 is divided among the fishing systems according to the following scheme: purse seine: 72,7%, longline: 13,5%, tuna trap²¹: 8,1%; recreational fishery: 0,5%; undivided share: 5,3%²².

North Sea

On 11 June 2021, the Council of the European Union approved the European Union - United Kingdom agreement on fishing opportunities for 2021 and, for deep-sea stocks, for 2021 and 2022. This agreement also set out the total allowable catches (TAC) for 75 shared fish stocks for 2021, as well as for a number of deep-sea stocks, and provided clarity on access limits for non-quota species²³.

²⁰ For more information, please visit: <https://www.gov.uk/government/news/new-fisheries-technical-measures>

²¹ For a definition of Tuna trap, please visit: https://www.europarl.europa.eu/doceo/document/P-7-2013-014163_EN.html

²² Directorial Decree number 168451 of 13 April 2021 “Bluefin tuna fishing campaign – 2021”:
<https://www.politicheagricole.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/16892>

²³ A press release about the agreement is available at: <https://www.consilium.europa.eu/en/press/press-releases/2021/06/11/council-approves-eu-uk-agreement-on-fishing-opportunities/>

Total Allowable Catches uptake

The following table reports the Total Allowable Catches (TAC) uptake per sea basin and for selected species consumed and/or utilized up to June 2021.²⁴

Figure 10 TAC uptake²⁵

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

²⁴ Data provided by FIDES (Fisheries Data Exchange System).

²⁵ Data for France, Italy and Portugal are not included in the table.



Other highlights

Bay of Biscay and Iberian coast

According to the weekly first sales data available²⁶, the top species in this sea basin in terms of value in June 2021 were the following.

Figure 11 Top species in terms of value in selected locations in the Bay of Biscay and Iberian coast in June 2021 (weeks 22-25)

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

²⁶ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France, Portugal and Spain. Thus, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 3 refer to, please see Annex below in this document.

Black sea

The following table reports monthly first sales data for June in Bulgaria²⁷. It appears that volumes of red mullet strongly increased in 2021 compared to the same month of 2020, while volumes of sprat partially recovered from the drop reported in June 2020.

Figure 12 Top species in terms of value for the month of June

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

Commitments to support small-scale fishers in the Black Sea were renewed during the high-level representatives from Mediterranean and Black Sea countries, the European Commission, FAO, the GFCM, and WWF which took place on 30 June 2021²⁸. During the meeting, it was reaffirmed the commitment to fully implement the Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea.²⁹

²⁷ The most recent monthly first sales data for April 2021 are available via the EUMOFA website and can be accessed [here](#).

²⁸ More information about the meeting is available at: <http://www.fao.org/gfcm/news/detail/en/c/1414279/>

²⁹ The Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea - RPOA-SSF is available at this link: <http://www.fao.org/gfcm/activities/fisheries/small-scale-fisheries/rpoa-ssf>

Mediterranean Sea

According to the weekly first sales data available³⁰, the top species in this sea basin in terms of value in June 2021, were the following.

Figure 13 Top species in terms of value in selected locations in the Mediterranean Sea in June 2021 (weeks 22-25)

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

North Sea

Recently, the National Federation of Fishermen's Organisations (NFFO) met the Governments All Party Parliamentary Group (APPG) to discuss fishing activities around the development of offshore renewables. There is pressure on fishermen to co-exist with the challenges of marine space, protected areas and installations of huge wind farms.³¹

Norway³² announced that it was unilaterally increasing its share of the North East Atlantic mackerel quota for 2021 from 191.843 to 298.299 tonnes, a 55% increase which was also replicated by the Faroe Islands. This has led to concern in the European and UK pelagic sector and will be challenged by the respective organisations.³³

On 4 June, Norway, Iceland, Liechtenstein, and the United Kingdom agreed in principle a new trade deal, which also concerns the introduction of cutting-edge digital provisions to limit bureaucratic issues.³⁴

³⁰ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France and Spain. Therefore, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 4 refer to, please see Annex below in this document.

³¹ For more information, visit: <https://www.nffo.org.uk/can-fisheries-co-exist-with-offshore-wind-in-the-race-to-carbon-net-zero/>

³² The press release from the Norwegian Ministry for trade, industry and fisheries is available at this link:

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

³³ For more information, visit: <https://fishingnews.co.uk/news/norway-faroe-increase-mackerel-quotas-reckless/>

³⁴ More information about the deal is available at: <https://www.gov.uk/government/news/uk-secures-new-deal-with-norway-iceland-and-liechtenstein>

From all sea basins

FAO recently released a new brief on how the COVID-19 crisis has affected the aquatic food systems, starting from the evidence experienced to date, to focus on responses to improve sector's resilience.³⁵

Marine gasoil prices in June 2021

Price of gasoil³⁶ in the monitored sea basins remained almost stable between May and June 2021; the largest changes were observed for Celtic Sea and North Sea where gasoil prices fell by 0,4%.

Figure 14 Marine gasoil prices

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

³⁵ The FAO publication "Aquatic food systems under COVID-19" is available at this link:

www.fao.org/publications/card/en/c/CB5398EN

³⁶ Data collected from Mabux: Marine bunker exchange and aggregated on a monthly basis.

Annex

Bay of Biscay and Iberian coast

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

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

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

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

Market developments of the EU fishery and aquaculture sector - June 2021

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

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

Mediterranean Sea

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

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

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

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

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

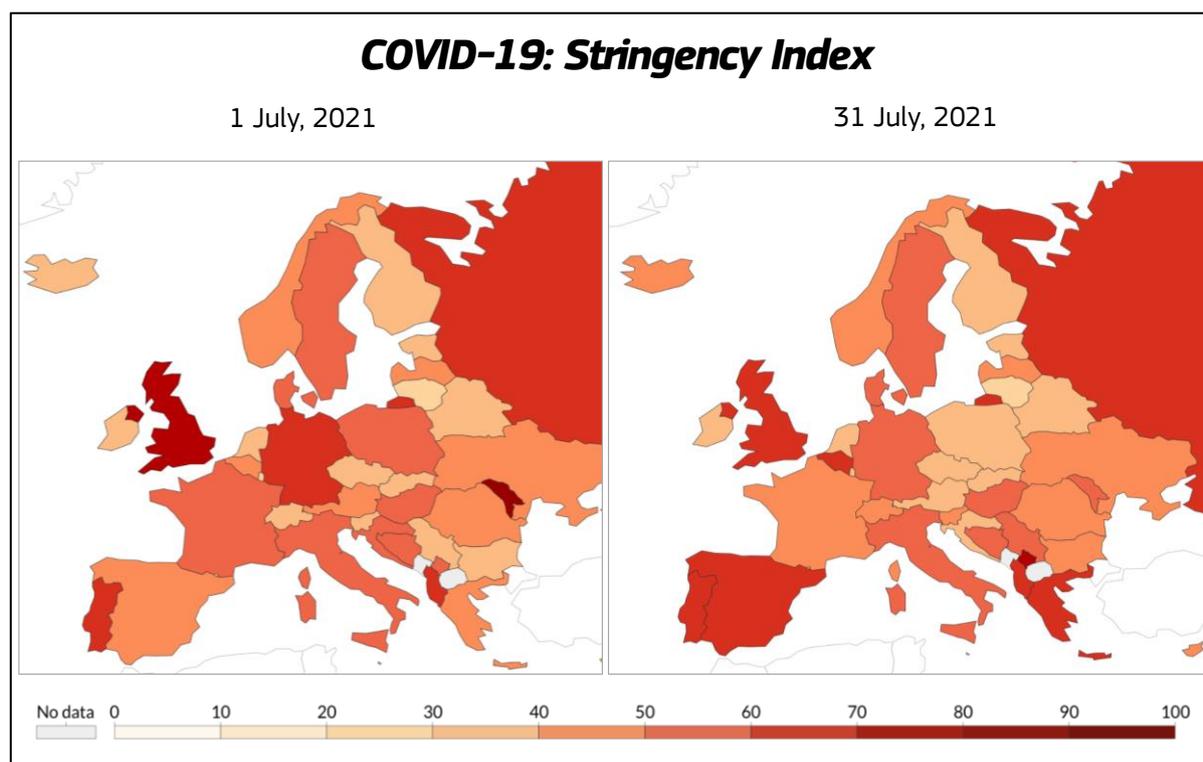
Market developments of the EU fishery and aquaculture sector – July 2021



Overview on COVID-19 response measures taken

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

Figure 15 - Response measures undertaken by countries in the European sea basins



Source: Stringency Index. Data published by: Thomas Hale, Noam Angrist, Rafael Goldszmidt, Beatriz Kira, Anna Petherick, Toby Phillips, Samuel Webster, Emily Cameron-Blake, Laura Hallas, Saptarshi Majumdar, and Helen Tatlow. (2021). "A global panel database of pandemic policies (Oxford COVID-19 Government Response Tracker)." *Nature Human Behaviour*. <https://doi.org/10.1038/s41562-021-01079-8>³⁷

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

³⁷ Map available at: <https://www.bsg.ox.ac.uk/research/research-projects/oxford-covid-19-government-response-tracker>



Weather

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

Figure 16 - Weather conditions in July 2021 compared with July 2020

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



Fishing or market closures and openings

Baltic Sea

As for June 2021, the “Council Regulation (EU) No 2020/1579 of 29 October 2020 fixing for 2021 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Baltic Sea and amending Regulation (EU) 2020/123 as regards certain fishing opportunities in other waters” provides that in July 2021 it shall be prohibited to fish with any type of fishing gear in FAO areas 24, 25, and 26. An exemption from the prohibition applies to EU fishing vessels of less than 12 meters in length operating in waters with depth than 20 meters.³⁸

Celtic Sea

On 1 July, the International Council for the Exploration of the Sea (ICES) published an updated version of its Advice on fishing opportunities, catch and effort for 2022 for the Celtic Seas and Oceanic Northeast Atlantic ecoregions. The Advice, which concerns haddock (*Melanogrammus aeglefinus*) in Division 6.b (Rockall), stated that “when the MSY approach is applied, catches in 2022 should be no more than 5.825 tonnes”.³⁹

Mediterranean Sea and Black Sea

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

North Sea

Based on Commission Regulation (EC) No 724/2010 of 12 August 2010⁴⁰, Denmark has established a Real Time Closure (RCT) in an area of in Skagerrak from 24 June to 14 July 2021⁴¹. The area is closed for fishing except for the following gears: pelagic trawls, purse seine, driftnets and jiggers targeting herring, mackerel, and horse mackerel, pot, scallop dredges, and gillnets.

From all sea basins

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

³⁸ Council Regulation (EU) 2020/1579 of 29 October 2020: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2020.362.01.0003.01.ENG

³⁹ ICES. 2021. Haddock (*Melanogrammus aeglefinus*) in Division 6.b (Rockall). In Report of the ICES Advisory Committee, 2021. ICES Advice 2021, had.27.6b. <https://doi.org/10.17895/ices.advice.7762>.

⁴⁰ Commission Regulation (EC) no 724/2010 of 12 August 2010, available at <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2010:213:0001:0005:EN:PDF>

⁴¹ For more information, please visit: <https://fiskeristyrelsen.dk/english/fishery-control-and-enforcement/real-time-closures/#c83732>

Total Allowable Catches uptake

The following table reports the Total Allowable Catches (TAC) uptake per sea basin and for selected species consumed and/or utilized up to July 2021.⁴²

Figure 17 - TAC uptake⁴³

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

⁴² Data provided by FIDES (Fisheries Data Exchange System).

⁴³ Data for Bulgaria, Greece and Romania are not included in the table.



Other highlights

Bay of Biscay and Iberian coast

According to the weekly first sales data available⁴⁴, the top species in this sea basin in terms of value in July 2021 were the following.

Figure 18 - Top species in terms of value in selected locations in the Bay of Biscay and Iberian coast in July 2021 (weeks 26-30)

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

⁴⁴ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France, Portugal and Spain. Thus, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 3 refer to, please see Annex below in this document.

Black sea

The following table reports monthly first sales data for July in Bulgaria⁴⁵. It appears that volumes of clam and sprat strongly increased in 2021 compared with the same month of 2020, thus recovering from the drop reported in 2020, while volumes of red mullet maintained the upward trend showed in July 2020.

Figure 19 - Top species in terms of value for the month of July 2021

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

⁴⁵ The most recent monthly first sales data for July 2021 are available via the EUMOFA website and can be accessed [here](#).

Mediterranean Sea

According to the weekly first sales data available⁴⁶, the top species in this sea basin in terms of value in July 2021, were the following.

Figure 20 - Top species in terms of value in selected locations in the Mediterranean Sea in July 2021 (weeks 26-30)

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

⁴⁶ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France and Spain. Therefore, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 4 refer to, please see Annex below in this document.

Marine gasoil prices in July 2021

Price of gasoil⁴⁷ in the monitored sea basins remained stable between June and July 2021. A slight change was observed in the North Sea, where gasoil prices increased by 1%.

Figure 21 Marine gasoil prices

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

⁴⁷ Data collected from Mabux: Marine bunker exchange and aggregated on a monthly basis.

Annex

Bay of Biscay and Iberian coast

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

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

Market developments of the EU fishery and aquaculture sector - July 2021

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

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

Market developments of the EU fishery and aquaculture sector - July 2021

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

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

Mediterranean Sea

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

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

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

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

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

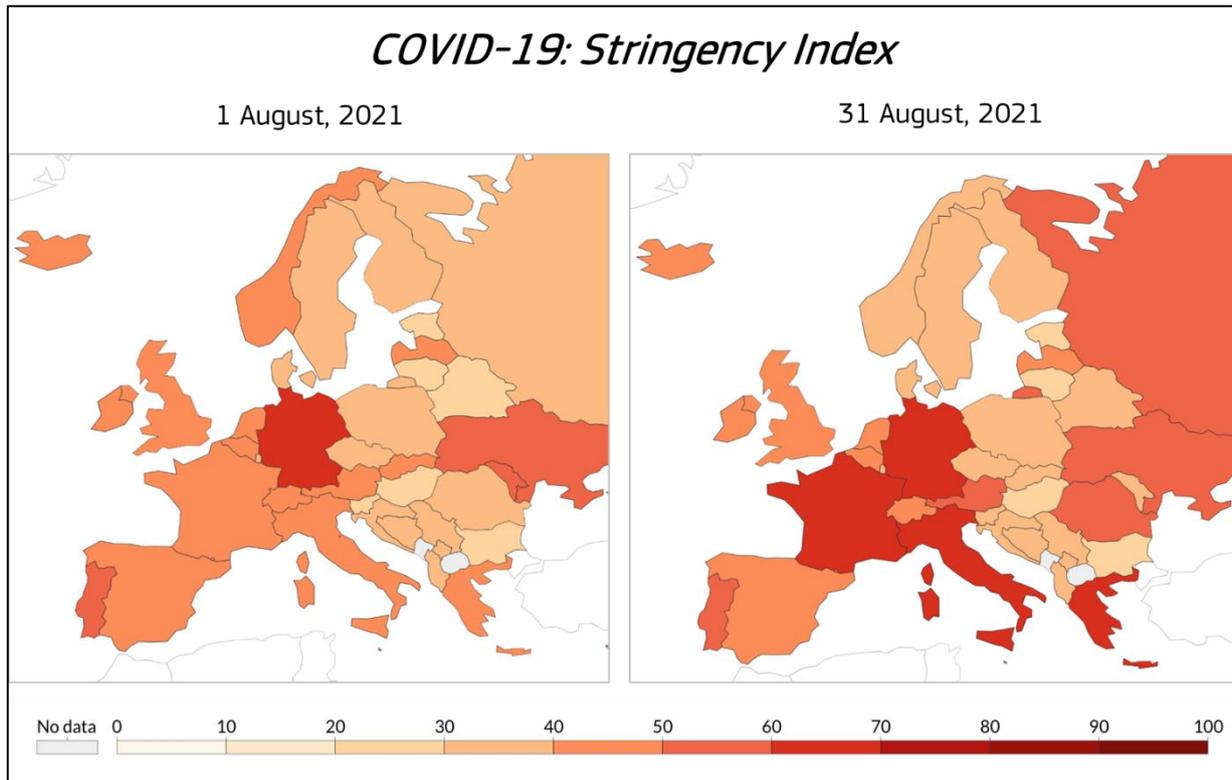
Market developments of the EU fishery and aquaculture sector – August 2021



Overview on COVID-19 response measures taken

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

Figure 22 - Response measures undertaken by countries in the European sea basins



Source: Stringency Index. Data published by: Thomas Hale, Noam Angrist, Rafael Goldszmidt, Beatriz Kira, Anna Petherick, Toby Phillips, Samuel Webster, Emily Cameron-Blake, Laura Hallas, Saptarshi Majumdar, and Helen Tatlow. (2021). "A global panel database of pandemic policies (Oxford COVID-19 Government Response Tracker)." *Nature Human Behaviour*. <https://doi.org/10.1038/s41562-021-01079-8>.⁴⁸

According to the Stringency Index, measures adopted to face the COVID-19 pandemic spread remained stable in most of the EU Member States. Measures were slightly reinforced in Austria, France, Greece, Italy, Romania, and Slovenia, while slightly lightened in Slovakia and Norway.

⁴⁸ Map available at: <https://www.bsg.ox.ac.uk/research/research-projects/covid-19-government-response-tracker>



Weather

The weather conditions in August 2021 appeared to be similar to those recorded in the same month of the previous year. They do not seem to have had a major impact on the fishery activities.

Figure 23 - Weather conditions in August 2021 compared with August 2020

Sea basin	Impact: low, medium, high	Comments
Baltic Sea		The weather conditions were appropriate for fishing, with no extreme weather conditions registered.
Bay of Biscay and Iberian coast		The weather conditions were appropriate for fishing, and similar to those registered in past years
Celtic Sea		The weather conditions were appropriate for fishing, with no extreme weather conditions registered.
Mediterranean Sea		The weather was particularly warm in several Mediterranean countries, with surface temperatures above 50 degrees in many locations.
North Sea		The weather conditions were appropriate for fishing, with windy conditions at the beginning of the month, and a dry weather in the rest of the month.



Fishing or market closures and openings

Baltic Sea

As for July 2021, the “Council Regulation (EU) No 2020/1579 of 29 October 2020 fixing for 2021 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Baltic Sea and amending Regulation (EU) 2020/123 as regards certain fishing opportunities in other waters” provides that in August 2021 it shall be prohibited to fish with any type of fishing gear in FAO areas 24, 25, and 26. An exemption from the prohibition applies to EU fishing vessels of less than 12 meters in length operating in waters with depth exceeding 20 meters.⁴⁹

Mediterranean Sea

In most of the Adriatic Sea, the Italian bottom otter trawl (OTB), beam trawl and otter twin trawl (OTT) fleets were not active in accordance with the compulsory temporary interruption of fishing activities foreseen by the Italian Ministerial Decree n. 229107 of 18/05/21.⁵⁰

North Sea

Further to the ICES Advice on fishing opportunities, catch, and effort published on 30 June 2021⁵¹, which proposed to decrease total allowable catch (TAC) for North Sea cod by 10.3% in 2022, concerns continue to be raised by sector Associations about the impact of that proposal⁵².

All EU Member States

The Commission Regulation (EU) 2021/1376 of 13 August 2021 established a fisheries closure for redfishes in NAFO 3M area for vessels flying the flag of a Member State of the European Union, due to the exhaustion of the quota allocated for 2021.⁵³

On 26 August 2021, the European Commission adopted its proposal⁵⁴ for a “Council Regulation fixing for 2022 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Baltic Sea, and amending Regulation (EU) 2021/92 as regards certain fishing opportunities in other waters”⁵⁵. The proposed total allowable catches (TACs) are based on the scientific advice from the International Council on the Exploration of the Seas (ICES) and follow the Baltic multiannual management plan, which was adopted by the European Parliament and the Council in 2016. The proposal concerned fishing opportunities for

⁴⁹ Council Regulation (EU) 2020/1579 of 29 October 2020: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2020.362.01.0003.01.ENG

⁵⁰ More information about fishing closure is available at <https://www.politicheagricole.it/flex/cm/pages/ServeAttachment.php/L/IT/D/9%252F4%252Fd%252FD.c2bc5d8a18dbdf0a3bfb/P/BLOB%3AID%3D17050/E/pdf>

⁵¹ ICES Advice on fishing opportunities, catch, and effort about “Cod (*Gadus morhua*) in Subarea 4, Division 7.d, and Subdivision 20 (North Sea, eastern English Channel, Skagerrak)”, available at: <https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2021/2021/cod.27.47d20.pdf>

⁵² For more details, please visit: <https://fisherynation.com/archives/103706> and <https://www.shetnews.co.uk/2021/08/18/record-stocks-disprove-claims-of-overfishing-association-says/>

⁵³ Text of the proposal available at <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2021:491:FIN>

⁵⁴ European Commission, Fishing opportunities in the Baltic Sea for 2022: improving long-term sustainability of stocks (26 August 2021), available at https://ec.europa.eu/commission/presscorner/detail/en/IP_21_4202

⁵⁵ The text of the proposal for a Council Regulation is available at this link: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2021:491:FIN>

herring, sprat, plaice salmon and cod. As regards, the proposal will be updated as soon as scientific advice for western Baltic cod, western Baltic herring and salmon will be available.

Total Allowable Catches uptake

The following table reports the Total Allowable Catches (TAC) uptake per sea basin and for selected species consumed and/or utilized up to August 2021.

Figure 24 - TAC uptake

Sea basin	Species	Adapted quotas	Total catches	% consumed up to August 2021
Baltic sea	Cod	6.550	2.067	32%
	European plaice	23.390	5.639	24%
	Herring	281.439	159.921	57%
	Norway lobster	12.382	4.261	34%
Bay of biscay	Anchovy	15.005	10.489	70%
	Common sole	3.399	2.343	69%
	Hake	50.911	21.909	43%
	Norway lobster	4.360	2.856	66%
Black sea	Sprat (=Brisling)	11.475	3.204	28%
	Turbot	150	95	63%
Celtic sea	Common sole	5.110	2.161	42%
	Haddock	15.903	6.376	40%
	Monk	33.941	16.064	47%
	Norway lobster	14.098	5.838	41%
Mediterranean sea	Bluefin tuna	22.168	16.111	73%
	Swordfish	6.560	3.096	47%
North sea	Cod	9.601	3.993	42%
	Common sole	18.525	4.846	26%
	European plaice	102.128	18.336	18%
	Norway lobster	3.093	1.675	54%



Other highlights

Bay of Biscay and Iberian coast

According to the weekly first sales data available⁵⁶, the top species in this sea basin in terms of value in August 2021 were the following.

Figure 25 - Top species in terms of value in selected locations in the Bay of Biscay and Iberian coast in August 2021 (weeks 31-34)

Weekly first sales		Time frame: W31-34			
Volume (KG)	2019	2020	2021	Trend	
Hake	1.399.900	1.281.404	713.277		
Lobster, Norway	94.221	139.806	142.501		
Monk	583.318	670.065	270.949		
Octopus	271.242	160.432	209.438		
Sardine	1.994.859	2.462.420	2.797.937		
Value (EUR)	2019	2020	2021	Trend	
Hake	6.045.886	5.061.215	3.545.073		
Lobster, Norway	1.574.478	2.021.388	2.028.257		
Monk	3.457.594	3.291.303	1.655.975		
Octopus	1.762.900	1.065.482	1.755.063		
Sardine	4.929.401	3.802.622	3.273.443		
Price (EUR/kg)	2019	2020	2021	Trend	
Hake	4,32	3,95	4,97		
Lobster, Norway	16,71	14,46	14,23		
Monk	5,93	4,91	6,11		
Octopus	6,50	6,64	8,38		
Sardine	2,47	1,54	1,17		

⁵⁶ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France, Portugal and Spain. Thus, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 3 refer to, please see Annex below in this document.

Black sea

The following table reports monthly first sales data for August in Bulgaria⁵⁷. It appears that volumes of red mullet and sprat strongly increased in 2021 compared with the same month of 2020, with sprat recovering from the drop reported in 2020. On the other hand, volumes of clam remained fairly stable compared with August 2020.

Figure 26 - Top species in terms of value for the month of August 2021

Monthly first sales		Time frame: August		
Volume (KG)	2019	2020	2021	Trend
Clam	39.491	62.916	63.806	
Red mullet	20.125	17.577	68.187	
Sprat (=Brisling)	166.276	53.915	248.038	
Value (EUR)	2019	2020	2021	Trend
Clam	62.147	143.401	121.400	
Red mullet	12.088	11.336	65.778	
Sprat (=Brisling)	52.835	17.159	78.450	
Price (EUR/kg)	2019	2020	2021	Trend
Clam	1,57 €	2,28 €	1,90 €	
Red mullet	0,60 €	0,64 €	0,96 €	
Sprat (=Brisling)	0,32 €	0,32 €	0,32 €	

⁵⁷ The most recent monthly first sales data for August 2021 are available via the EUMOFA website and can be accessed [here](#).

Mediterranean Sea

According to the weekly first sales data available⁵⁸, the top species in this sea basin in terms of value in August 2021, were the following.

Figure 27 - Top species in terms of value in selected locations in the Mediterranean Sea in August 2021 (weeks 31-34)

Weekly first sales		Time frame: W31-34		
Volume (KG)	2019	2020	2021	Trend
Mackerel	1.073	1.059	512	
Sardine	160.659	69.592	333.881	
Shrimp, miscellaneous	24.129	27.004	21.118	
Swordfish	30.995	81.204	59.251	
Value (EUR)	2019	2020	2021	Trend
Mackerel	5.746	7.055	4.957	
Sardine	45.806	21.490	77.406	
Shrimp, miscellaneous	1.135.571	1.170.328	1.064.398	
Swordfish	191.601	516.593	453.483	
Price (EUR)	2019	2020	2021	Trend
Mackerel	5,36	6,66	9,69	
Sardine	0,29	0,31	0,23	
Shrimp, miscellaneous	47,06	43,34	50,40	
Swordfish	6,18	6,36	7,65	

⁵⁸ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France and Spain. Therefore, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 4 refer to, please see Annex below in this document.

Marine gasoil prices in August 2021

Price of gasoil⁵⁹ in the monitored sea basins remained fairly stable between July and August 2021. A change was observed in the Celtic and North Seas, where gasoil prices decreased by 2%, respectively.

Figure 28 Marine gasoil prices

Sea basin	2021				
	June	July	August	July-August	%
Baltic Sea	0,46 €	0,46 €	0,46 €	=	0%
Bay of Biscay and Iberian	0,45 €	0,45 €	0,45 €	=	0%
Celtic Sea	0,42 €	0,42 €	0,41 €	↓	-2%
Mediterranean Sea	0,48 €	0,48 €	0,48 €	=	0%
North Sea	0,41 €	0,42 €	0,41 €	↓	-2%

⁵⁹ Data collected from Mabux: Marine bunker exchange and aggregated on a monthly basis.

Annex

Bay of Biscay and Iberian coast

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

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

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

Market developments of the EU fishery and aquaculture sector - August 2021

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

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

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

Mediterranean Sea

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

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

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

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

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

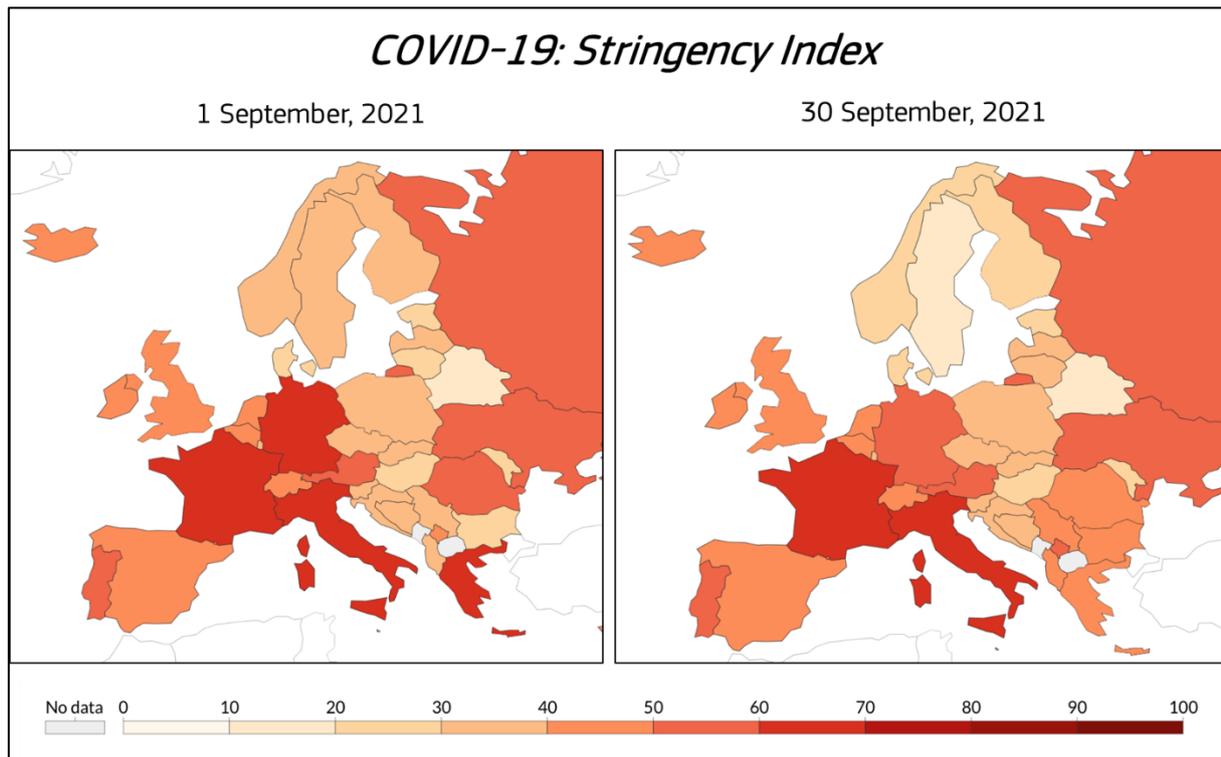
Market developments of the EU fishery and aquaculture sector – September 2021



Overview on COVID-19 response measures taken

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

Figure 29 - Response measures undertaken by countries in the European sea basins



Source: Stringency Index. Data published by: Thomas Hale, Noam Angrist, Rafael Goldszmidt, Beatriz Kira, Anna Petherick, Toby Phillips, Samuel Webster, Emily Cameron-Blake, Laura Hallas, Saptarshi Majumdar, and Helen Tatlow. (2021). "A global panel database of pandemic policies (Oxford COVID-19 Government Response Tracker)." *Nature Human Behaviour*. <https://doi.org/10.1038/s41562-021-01079-8>.⁶⁰

According to the Stringency Index, measures adopted to face the COVID-19 pandemic spread remained stable in most of the EU Member States. Measures were slightly reinforced in Greece and Lithuania, while slightly lightened in Germany, Finland, Norway, Romania, and Sweden.

⁶⁰ Map available at: <https://www.bsg.ox.ac.uk/research/research-projects/covid-19-government-response-tracker>



Weather

The weather conditions in September 2021 appeared to be similar to those recorded in the same month of the previous year. They do not seem to have had a major impact on the fishery activities.

Figure 30 - Weather conditions in September 2021 compared with September 2020

Sea basin	Impact: low, medium, high	Comments
Baltic Sea		The weather conditions were appropriate for fishing, with no extreme weather conditions registered.
Bay of Biscay and Iberian coast		The weather conditions were appropriate for fishing, and similar to those registered in past years.
Celtic Sea		The weather conditions were appropriate for fishing, with no extreme weather conditions registered.
Mediterranean Sea		The weather conditions were appropriate for fishing.
North Sea		The weather conditions were appropriate for fishing, and warmer in the first part of the month compared to those registered in past years.



Fishing or market closures and openings

Baltic Sea

A new ICES Advice on fishing opportunities, catch, and effort has been published on 15 September 2021. It concerns Atlantic salmon (*Salmo salar*) in subdivisions 22–31 (Baltic Sea, excluding the Gulf of Finland), advises “that according to the MSY approach the catch of salmon in the mixed-stock sea fisheries (both commercial and recreational) should be zero in 2022”.⁶¹

Mediterranean Sea

In most of the Ionian and south Tyrrhenian seas, the Italian bottom otter trawl (OTB), beam trawl and otter twin trawl (OTT) fleets were not active in accordance with the compulsory temporary interruption of fishing activities foreseen by the Italian Ministerial Decree n. 229107 of 18/05/21.⁶²

Black sea and Mediterranean Sea

On 17 September, the European Commission adopted a proposal for fishing opportunities for 2022 for certain fish stocks and groups of fish stocks applicable in the Mediterranean and Black Seas. This Regulation applies to Union fishing vessels exploiting several fish stocks, as detailed in article 2 of the document.⁶³

North Sea

Further to the ICES Advice on fishing opportunities, catch, and effort published on 30 June 2021⁶⁴, which proposed to decrease total allowable catch (TAC) for North Sea cod by 10.3% in 2022, discussions continue about the impact of that proposal⁶⁵.

⁶¹ ICES Advice on fishing opportunities, catch, and effort about concerns Atlantic salmon (*Salmo salar*) in subdivisions 22–31 (Baltic Sea, excluding the Gulf of Finland) is available at : <https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2021/2021/sal.27.22-31.pdf>

⁶² More information about fishing closure is available at <https://www.politicheagricole.it/flex/cm/pages/ServeAttachment.php/L/IT/D/9%252F4%252Fd%252FD.c2bc5d8a18dbdf0a3bfb/P/BLOB%3AID%3D17050/E/pdf>

⁶³ Text of the proposal available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2021:548:FIN>

⁶⁴ ICES Advice on fishing opportunities, catch, and effort about “Cod (*Gadus morhua*) in Subarea 4, Division 7.d, and Subdivision 20 (North Sea, eastern English Channel, Skagerrak)”, available at: <https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2021/2021/cod.27.47d20.pdf>

⁶⁵ For more details, please visit <https://www.openseas.org.uk/news/are-scotlands-fish-stocks-in-good-condition/> and <https://fishingnews.co.uk/features/four-reasons-to-raise-north-sea-cod-quotas/>

All EU Member States

On 23 September 2021, the European Commission has published the “Report from the Commission to the European Parliament and the Council: Implementation of the Technical Measures Regulation (Article 31 of Regulation (EU) 2019/1241)”. Building upon scientific assessments and contributions from the Scientific, Technical and Economic Committee for Fisheries (STECF) and the International Council for the Exploration of the Sea (ICES), the Regulation includes targets for technical measures to “reduce unwanted catches (especially of sensitive species); optimise exploitation patterns; contribute to improved yields; and ensure impacts of fishing on seabed habitats are in line with EU environmental”.⁶⁶

A new ICES Advice on fishing opportunities, catch, and effort has been published on 30 September 2021. It concerns Mackerel (*Scomber scombrus*) in subareas 1–8 and 14, and in Division 9.a (Northeast Atlantic and adjacent waters). The ICES Advice states that - when the MSY approach is applied - catches in 2022 should be no more than 794.920 tonnes.⁶⁷

Total Allowable Catches uptake

The following table reports the Total Allowable Catches (TAC) uptake per sea basin and for selected species consumed and/or utilized up to September 2021.

Figure 31 - TAC uptake

Sea basin	Species	Adapted quotas	Total catches	% consumed up to September 2021
Baltic sea	Cod	7.024	2.320	33%
	European plaice	26.139	6.292	24%
	Herring	300.619	172.934	58%
	Norway lobster	13.906	5.008	36%
Bay of biscay	Anchovy	15.005	11.416	76%
	Common sole	3.807	2.476	65%
	Hake	56.629	23.160	41%
	Norway lobster	4.792	2.980	62%
Black sea	Sprat (=Brisling)	11.475	3.436	30%
	Turbot	150	97	65%
Celtic sea	Common sole	5.251	2.675	51%
	Haddock	17.490	7.385	42%
	Monk	37.043	17.522	47%
	Norway lobster	15.766	6.221	39%
Mediterranean sea	Bluefin tuna	22.168	16.324	74%
	Swordfish	6.560	3.523	54%
North sea	Cod	9.287	4.387	47%
	Common sole	20.276	4.877	24%
	European plaice	109.909	19.175	17%
	Norway lobster	4.237	2.105	50%

⁶⁶ The report is available at <https://op.europa.eu/en/publication-detail/-/publication/73b768f6-1c6f-11ec-b4fe-01aa75ed71a1/language-en>

⁶⁷ ICES Advice on fishing opportunities, catch, and effort about Mackerel (*Scomber scombrus*) in subareas 1–8 and 14, and in Division 9.a is available at: <https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2021/2021/mac.27.nea.pdf>



Other highlights

Bay of Biscay and Iberian coast

According to the weekly first sales data available⁶⁸, the top species in this sea basin in terms of value in September 2021 were the following.

Figure 32 - Top species in terms of value in selected locations in the Bay of Biscay and Iberian coast in September 2021 (weeks 35-39)

Weekly first sales		Time frame: W35-39			
Volume (KG)	2019	2020	2021	Trend	
Hake	1.858.632	1.698.159	1.384.327		
Lobster, Norway	48.397	115.654	118.305		
Monk	682.004	771.099	467.441		
Octopus	248.481	166.876	272.114		
Sardine	554.394	2.369.161	3.563.808		
Value (EUR)	2019	2020	2021	Trend	
Hake	8.855.521	7.427.359	5.661.870		
Lobster, Norway	865.719	1.632.330	1.632.765		
Monk	3.813.886	4.027.227	2.750.594		
Octopus	1.701.904	1.202.633	2.301.919		
Sardine	1.039.231	3.085.907	3.604.215		
Price (EUR/kg)	2019	2020	2021	Trend	
Hake	4,76	4,37	4,09		
Lobster, Norway	17,89	14,11	13,80		
Monk	5,59	5,22	5,88		
Octopus	6,85	7,21	8,46		
Sardine	1,87	1,30	1,01		

⁶⁸ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France, Portugal and Spain. Thus, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 3 refer to, please see Annex below in this document.

Black sea

The following table reports monthly first sales data for August in Bulgaria⁶⁹. It appears that volumes of red mullet and sprat strongly increased in 2021 compared with the same month of 2020, with sprat recovering from the drop reported in 2020. On the other hand, volumes of clam remained fairly stable compared with August 2020.

Figure 33 - Top species in terms of value for the month of August 2021

Monthly first sales		Time frame: September			
Volume (KG)	2019	2020	2021	Trend	
Clam	376.154	381.712	499.764		
Red mullet	489.656	272.448	276.817		
Value (EUR)	2019	2020	2021	Trend	
Clam	1.036.703	905.555	1.120.634		
Red mullet	338.377	205.344	271.878		
Price (EUR/kg)	2019	2020	2021	Trend	
Clam	2,76 €	2,37 €	2,24 €		
Red mullet	0,69 €	0,75 €	0,98 €		

⁶⁹ The most recent monthly first sales data for August 2021 are available via the EUMOFA website and can be accessed [here](#).

Mediterranean Sea

According to the weekly first sales data available⁷⁰, the top species in this sea basin in terms of value in September 2021, were the following.

Figure 34 - Top species in terms of value in selected locations in the Mediterranean Sea in in September 2021 (weeks 31-34)

Weekly first sales		Time frame: W34-39			
Volume (KG)	2019	2020	2021	Trend	
Mackerel	17.844	72.773	106.048		
Sardine	20.278	19.512	16.180		
Shrimp, miscellaneous	45.529	58.183	35.257		
Swordfish	30.995	81.204	59.251		
Value (EUR)	2019	2020	2021	Trend	
Mackerel	10.134	6.048	2.058		
Sardine	4.836	24.556	25.717		
Shrimp, miscellaneous	866.294	827.307	783.464		
Swordfish	298.485	386.655	296.935		
Price (EUR)	2019	2020	2021	Trend	
Mackerel	0,57	0,08	0,02		
Sardine	0,24	1,26	1,59		
Shrimp, miscellaneous	19,03	14,22	22,22		
Swordfish	9,63	4,76	5,01		

⁷⁰ Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France and Spain. Therefore, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 4 refer to, please see Annex below in this document.

Marine gasoil prices in September 2021

Price of gasoil⁷¹ in the monitored sea basins remained fairly stable between August and September 2021. A change was observed in the North Sea, where gasoil prices increased by 2%.

Figure 35 Marine gasoil prices

Sea basin	2021			
	July	August	September	August-September %
Baltic Sea	0,46 €	0,46 €	0,46 € =	0%
Bay of Biscay and Iberian	0,45 €	0,45 €	0,45 € =	0%
Celtic Sea	0,42 €	0,41 €	0,41 € =	0%
Mediterranean Sea	0,48 €	0,48 €	0,48 € =	0%
North Sea	0,42 €	0,41 €	0,42 € ↑	2%

⁷¹ Data collected from Mabux: Marine bunker exchange and aggregated on a monthly basis.

Annex

Bay of Biscay and Iberian coast

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

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

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

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

Market developments of the EU fishery and aquaculture sector - September 2021

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

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

Mediterranean Sea

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

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

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

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

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

Appendix

This section gathers bi-weekly reports that contain weekly first-sale data for 15 products at place of sale level and weekly extra-EU imports data for 10 fresh products and 4 frozen tuna products. These reports aim at providing a rapid and large overview on the market evolutions of some of those species that were most likely affected by the COVID-19 pandemic. They cover the period from March 2021 to September 2021.



Week 12-2021.xlsx



Week 14-2021.xlsx



Week 16-2021.xlsx



Week 18-2021.xlsx



Week 20-2021.xlsx



Week 22-2021.xlsx



Week 24-2021.xlsx



Week 26-2021.xlsx



Week 28-2021.xlsx



Week 30-2021.xlsx



Week 34-2021.xlsx



Week 36-2021.xlsx



Week 38-2021.xlsx



Week 40-2021.xlsx



Week 42-2021.xlsx

EUM OFA

European Market Observatory for
Fisheries and Aquaculture Products



www.eumofa.eu