

Monthly Highlights

No. 6 / 2023

E U M O F A

European Market Observatory for
Fisheries and Aquaculture Products

In March 2023 in reporting EU MS, first sales of CG groundfish totalled EUR 46,7 million and 39.433 tonnes, representing an 8% increase in value and a 4% increase in volume compared to March 2022

Over the 36-month observation period (April 2020 – March 2023), the weighted average first-sales price of pouting in Portugal was 1,84 EUR/kg, 447% higher than that of the Netherlands (0,34 EUR/kg), and 4% above the average price in Spain (1,77 EUR/kg).

In 2020, trout was among the top 15 most consumed fishery and aquaculture products in the EU with 0,49 kg/capita consumption. This was a 3% increase compared to 2019.

In Denmark the average price of trout showed an upward trend, with a 17% increase over the last three years.

Consumption of FAPs in Japan is declining, whilst global consumption and trade are on the increase.

Between 2012 and 2021 global catches of European anchovy species have been stable despite fluctuations.

Assisted by the EU-funded Aquaculture Remote Classroom (ARC), Ireland's Seafood Development Agency Bord (BIM) is organising mobile classroom tours in small towns around the country.



Contents



First sales in Europe

Haddock (France, the Netherlands, Sweden) and pouting (the Netherlands, Portugal, Spain)



Extra-EU imports

Weekly average EU import prices of selected products from selected countries of origin



Consumption

Trout in Denmark, Germany, France, the Netherlands, and Poland



Case studies

Fisheries and aquaculture in Japan
Anchovy in the EU



Global highlights



Macroeconomic context

Marine fuel, consumer prices and exchange rates



Find all data, information, and more at:

www.eumofa.eu

@EU_MARE #EUMOFA

1. First sales in Europe

During **January–March 2023**, 12 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups¹. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section “*First sales in Europe*” are extracted from EUMOFA².

1.1. January–March 2023 compared to the same period in 2022

Increases in value and volume: Estonia, Germany, Italy, Latvia, Portugal, Spain and the United Kingdom recorded an increase in both first-sales value and volume. Highest increases were observed in Estonia and Germany. Herring and sprat were principally responsible for increases in Estonia, while in Germany they were due to mackerel and European flounder.

Decreases in value and volume: Bulgaria, France, the Netherlands, and Sweden recorded decreases in first-sales value and volume. Bulgaria and Sweden stood out with the most significant drops in absolute terms. These were due to lower first-sales of clam and red mullet in Bulgaria, and sprat and mackerel in Sweden.

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

Country	January – March 2021		January – March 2022		January – March 2023		Change from January – March 2022	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Bulgaria	179	0,3	99	0,2	83	0,1	-16%	-59%
Cyprus	92	0,6	82	0,5	79	0,6	-3%	3%
Estonia	24.356	5,4	12.531	3,1	24.195	7,1	93%	126%
France	52.569	165,1	52.538	188,4	51.144	186,1	-3%	-1%
Germany	13.468	9,0	7.247	7,7	9.487	12,2	31%	58%
Italy	19.250	77,5	15.391	72,1	16.580	76,7	8%	6%
Latvia	16.227	3,4	12.516	2,7	13.762	3,6	10%	33%
Lithuania	1.025	0,5	462	0,3	96	0,4	-79%	23%
Netherlands	45.868	63,1	74.463	69,4	53.275	52,8	-28%	-24%
Portugal	14.150	51,6	14.483	64,1	15.535	66,0	7%	3%
Spain	107.764	304,4	92.213	318,0	95.210	321,7	3%	1%
Sweden	66.075	23,1	28.484	16,0	18.695	13,7	-34%	-14%
Norway	957.548	835,9	914.425	1035,2	1.035.454	999,2	13%	-3%
United Kingdom	90.313	136,0	88.337	161,7	97.473	168,7	10%	4%

Possible discrepancies in % changes are due to rounding.

* Volumes are reported in net weight for EU Member States, and in live weight equivalent (LWE) for Norway. Prices are reported in EUR/kg (without VAT). For Norway, prices are reported in EUR/kg of live weight.

¹ Bivalves, other molluscs and aquatic invertebrates, cephalopods, crustaceans, groundfish, freshwater fish, groundfish, salmonids, groundfish, tuna and tuna-like species, and other marine fish.

² First sales data updated on 13.05.2023.

1.2. March 2023 compared to March 2022

Increases in value and volume: First sales increased in Bulgaria, Estonia, Italy, Portugal, Spain, and Sweden. The highest increase was observed in Estonia and Sweden. In Estonia other freshwater fish and smelt were behind the sharp increases, while in Sweden it was sprat and herring.

Decreases in value and volume: First sales decreased in Cyprus, France, Lithuania and the Netherlands. Lithuania, where the most significant drops were observed, saw decreases due to smelt, herring and cod.

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

Country	March 2021		March 2022		March 2023		Change from March 2022	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Bulgaria	126	0,2	31	0,1	78	0,070	152%	23%
Cyprus	44	0,3	39	0,2	33	0,2	-16%	-9%
Estonia	7.384	1,5	102	0,2	9.889	2,9	9.588%	1.242%
France	20.585	58,4	20.281	65,4	17.349	57,3	-14%	-12%
Germany	4.842	3,7	710	2,6	1.735	1,9	144%	-26%
Italy	7.586	31,5	5.374	26,3	6.642	30,9	24%	18%
Latvia	6.843	1,4	6.220	1,3	5.492	1,5	-12%	14%
Lithuania	299	0,19	209	0,155	11	0,023	-95%	-85%
Netherlands	19.010	26,7	29.768	21,3	27.209	20,1	-9%	-6%
Portugal	6.350	23,0	4.360	20,0	5.991	24,9	37%	25%
Spain	57.501	134,4	40.585	122,4	46.398	131,4	14%	7%
Sweden	21.569	8,5	2.804	4,0	15.986	8,2	470%	104%
Norway	370.545	306,0	373.275	451,2	469.827	429,3	26%	-5%
United Kingdom	25.762	41,3	26.484	46,0	26.977	40,6	2%	-12%

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.*

The most recent weekly first-sales data (**up to week 23 of 2023**) are available via the EUMOFA website and can be accessed [here](#).

The most recent monthly first-sales data **for April 2023** are available via the EUMOFA website and can be accessed [here](#).

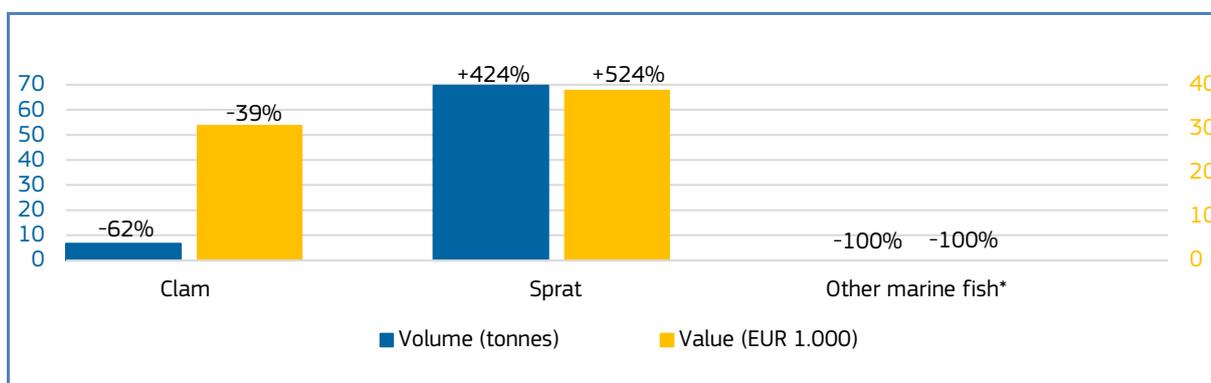
1.3. First sales in selected countries

First sales data analysed in this section are extracted from EUMOFA³.

Table 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA**

 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2023 vs Jan-Mar 2022	EUR 0,1 million, -59%	83 tonnes, -16%	Clam, red mullet.
Mar 2023 vs Mar 2022	EUR 0,070 million, +23%	78 tonnes, +152%	Clam, sprat.

Figure 1. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA, MARCH 2023**

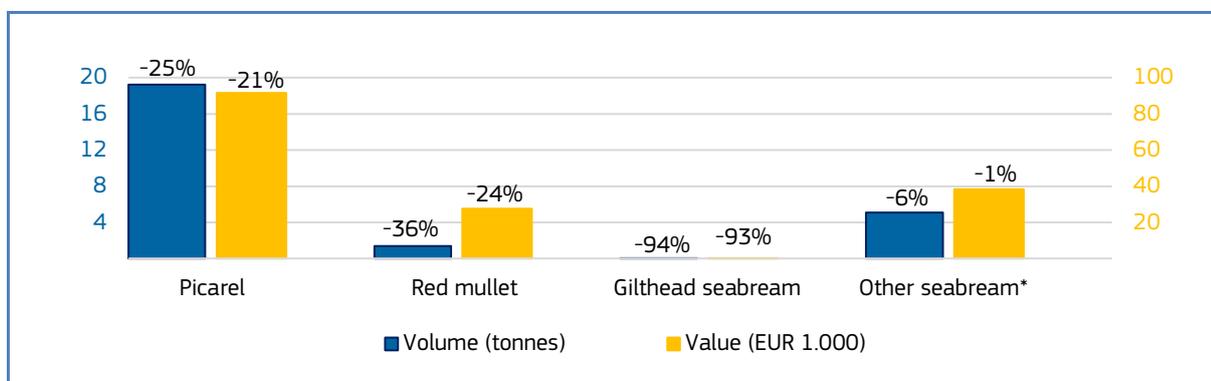


Percentages show change from the previous year. Metadata 2, Annex 3: <https://eumofa.eu/supply-balance-and-other-methodologies>

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

 Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2023 vs Jan-Mar 2022	EUR 0,6 million, +3%	79 tonnes, -3%	Value: other seabream*, squid, cuttlefish. Volume: picarel, red mullet, gilthead seabream.
Mar 2023 vs Mar 2022	EUR 0,2 million, -9%	33 tonnes, -16%	Picarel, red mullet, gilthead seabream, other seabream*.

Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS, MARCH 2023**



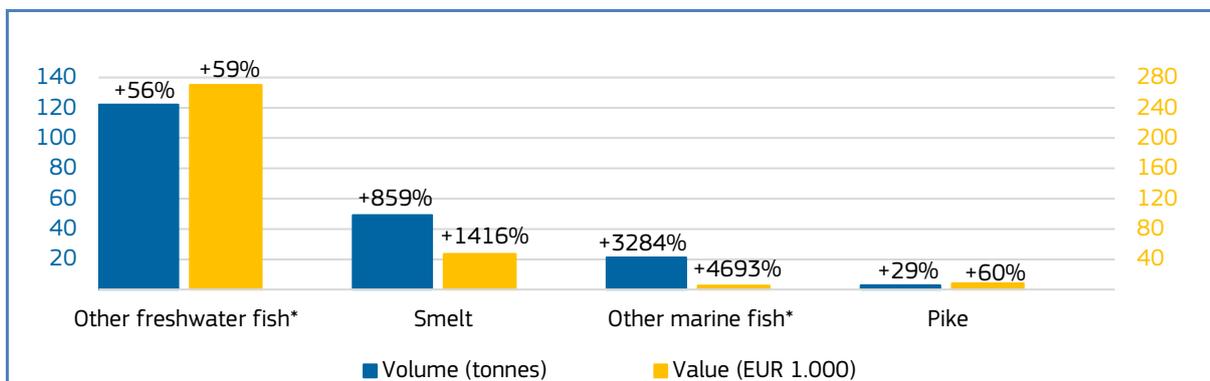
Percentages show change from the previous year. *EUMOFA aggregation for species.

³ First-sales data updated on 13.5.2023.

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

 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Mar 2023 vs Jan-Mar 2022	EUR 7,1 million, +126%	24.195 tonnes, +93%	Herring, sprat, other freshwater fish*	Total first-sales value and volume in March 2023 were significantly higher compared to March 2022. This is because in March 2022 there were no sales of sprat and herring , thus affecting calculations for discrepancies between March 2023 and 2022. However, in March 2023 sales of sprat (EUR 0,95 million, 3.728 tonnes) and herring (EUR 1,62 million, 5.953 tonnes) from the Estonian fleet were significant compared to the lack of sales in March 2022 Smelt recorded higher first sales in March 2023 compared to March 2022 due to available resources, mild weather conditions and capacity of suppliers, enabling provision of more smelt to the market than in March 2022. In Estonia the fishery of smelt is seasonal and occurs mostly in coastal areas of the Gulf of Riga. Fisheries of that species are dependent on ice cover of the fishing areas and other weather conditions.
Mar 2023 vs Mar 2022	EUR 2,9 million, +1242%	9.889 tonnes, -9588%	Other freshwater fish*, smelt, other marine fish*, pike.	

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, MARCH 2023**

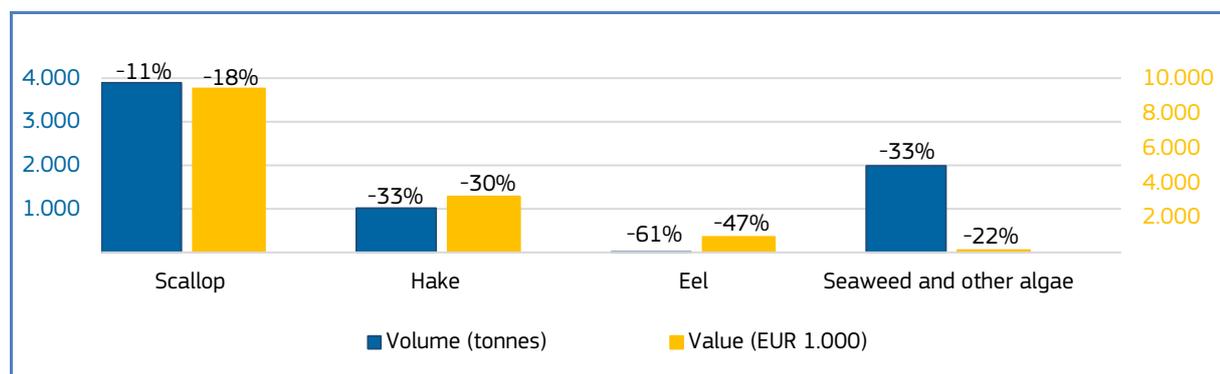


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2023 vs Jan-Mar 2022	EUR 186,1 million, -1%	51.144 tonnes, -3%	Eel, hake, whiting., seaweed and other algae.
Mar 2023 vs Mar 2022	EUR 57,3 million, -12%	17.349 tonnes, -14%	Scallop, hake, eel, seaweed and other algae.

Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, MARCH 2023**

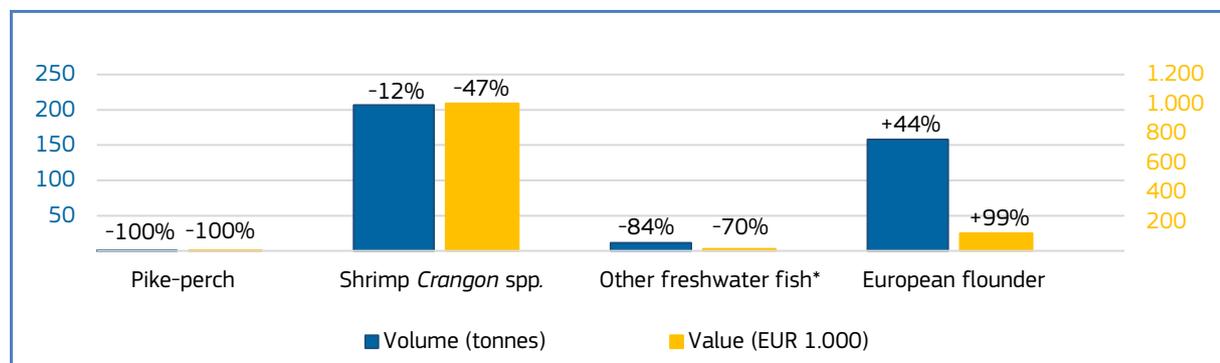


Percentages show change from the previous year.

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

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2023 vs Jan-Mar 2022	EUR 12,2 million, +58%	9.487 tonnes, +31%	Mackerel, European flounder, European plaice, shrimp <i>Crangon</i> spp.
Mar 2023 vs Mar 2022	EUR 1,9 million, -26%	1.735 tonnes, +144%	Value: shrimp <i>Crangon</i> spp., saithe, pike-perch. Volume: shrimp <i>Crangon</i> spp., European flounder, European plaice.

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY, MARCH 2023**



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

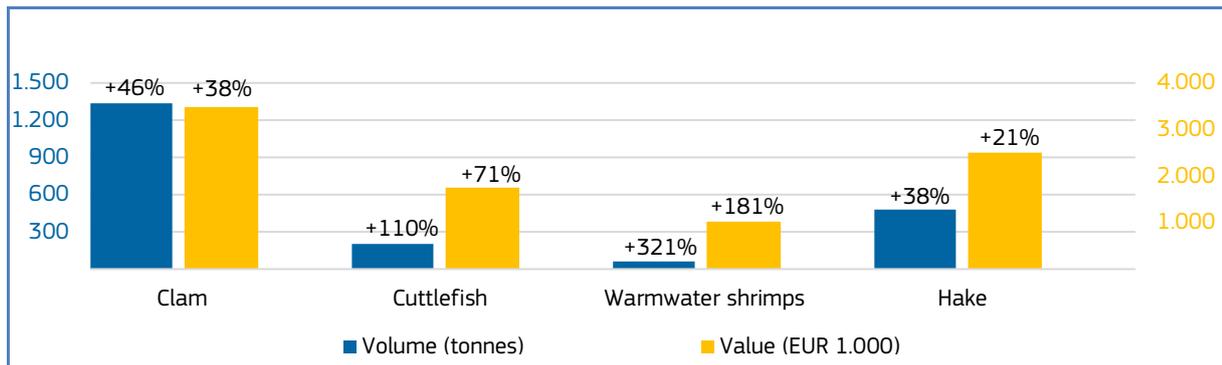
Table 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY**

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Mar 2023 vs Jan-Mar 2022	EUR 76,7 million, +6%	16.580 tonnes, +8%	Warmwater shrimps, cuttlefish, octopus, clam, hake.	In March 2023 compared to March 2022, cuttlefish recorded a strong increase in first sales value and volume. In Italy the highest landings of cuttlefish came from the Northern Adriatic Sea ⁴ . In this area, high fishing pressure is generally exerted on spawning adults, taking advantage of spawning migrations to coastal areas, mainly during spring. Such migrations
Mar 2023 vs Mar 2022	EUR 30,9 million, +18%	6.642 tonnes, +24%	Clam, cuttlefish, warmwater shrimps, hake.	

⁴ <https://stecf.jrc.ec.europa.eu/dd/fdi/explore-data>

start in March and produce a high and localised abundance of individuals, easily targeted by small scale fishing vessels using traps⁵. It is possible that after many fishing seasons with low yields due to overexploitation of the resource⁶, the start of coastal migrations in 2023 was characterised by bigger and more abundant specimens, giving higher numbers both in terms of value and volume.

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, MARCH 2023**

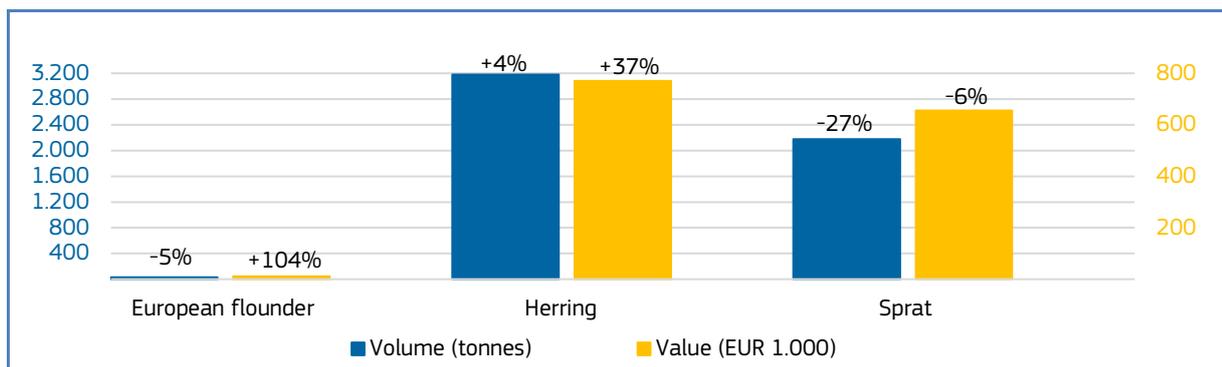


Percentages show change from the previous year.

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2023 vs Jan-Mar 2022	EUR 3,6 million, +33%	13.762 tonnes, +10%	Herring, sprat, other marine fish*, smelt, herring.
Mar 2023 vs Mar 2022	EUR 1,5 million, +14%	5.492 tonnes, -12%	Value: European flounder, herring, other marine fish*. Volume: sprat, other marine fish*, smelt.

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, MARCH 2023**



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

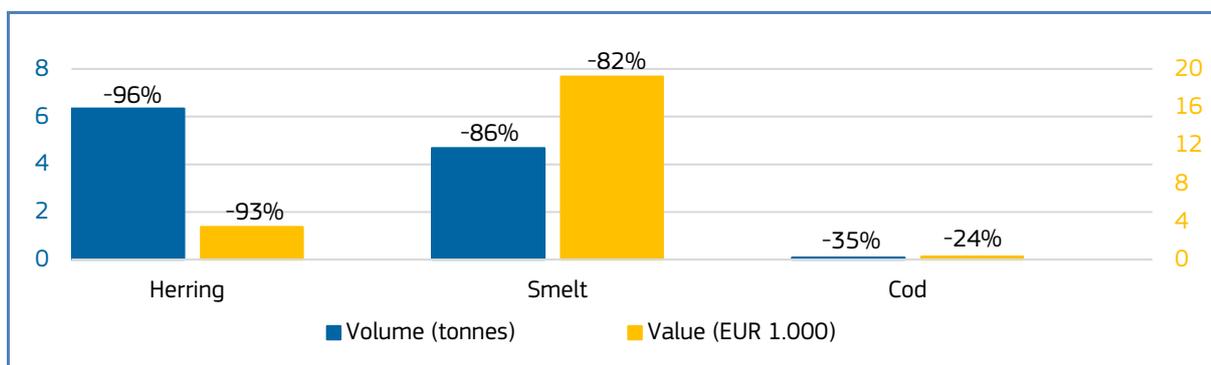
⁵ Belcari P, Sartor P, Sanchez P, Demestre M, Tsangridis A, et al. (2002) Exploitation patterns of the cuttlefish, *Sepia officinalis* (Sepioidea: Sepiidae) in the Mediterranean Sea. *B Mar Sci* 71: 187–196.

⁶ https://gfcmsitestorage.blob.core.windows.net/website/5.Data/SAFs/DemersalSpecies/2021/SAF_CTC_17_RefY2021.pdf

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

 Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species	Notes
Jan-Mar 2023 vs Jan-Mar 2022	EUR 0,4 million, +23%	96 tonnes, -79%	Value: Smelt, other freshwater fish*. Volume: Herring, pike-perch, cod.	First sales of smelt were lower in March 2023 compared to March 2022. In Lithuania smelt is only fished in coastal areas of the Baltic Sea. The smelt fishery is seasonal and concentrated during November to March. Smelt is very popular for local use. In the winter, when smelt are spawning, the stock comes closer to coastal areas. Water temperature and wind direction are the determining factors for fishing smelt. In March 2023, the wind direction and other conditions were not favourable for smelt coming to coastal areas. Fishing effort was thus reduced as it was not profitable and supply to the market decreased. Increased energy prices and insufficient supply of smelt to the market led to a 34% increase in price in March 2023 compared to March 2022.
Mar 2023 vs Mar 2022	EUR 0,023 million, -85%	11 tonnes, -95%	Smelt, herring, cod.	

Figure 8. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, MARCH 2023

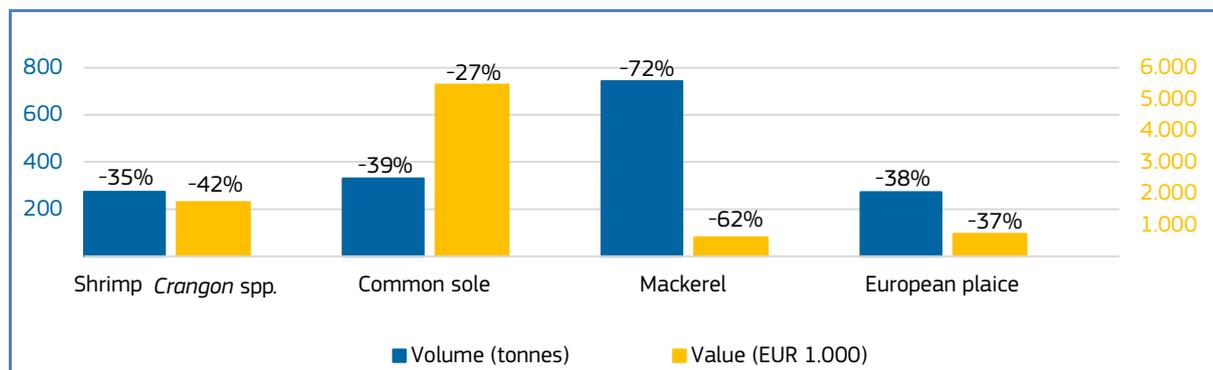


Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 11. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS

 the Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2023 vs Jan-Mar 2022	EUR 52,8 million, -24%	53.275 tonnes, -28%	Atlantic horse mackerel, common sole, herring, blue whiting.
Mar 2023 vs Mar 2022	EUR 20,1 million, -6%	27.209 tonnes, -9%	Shrimp <i>Cangron</i> spp., common sole, mackerel, European plaice.

Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, MARCH 2023**



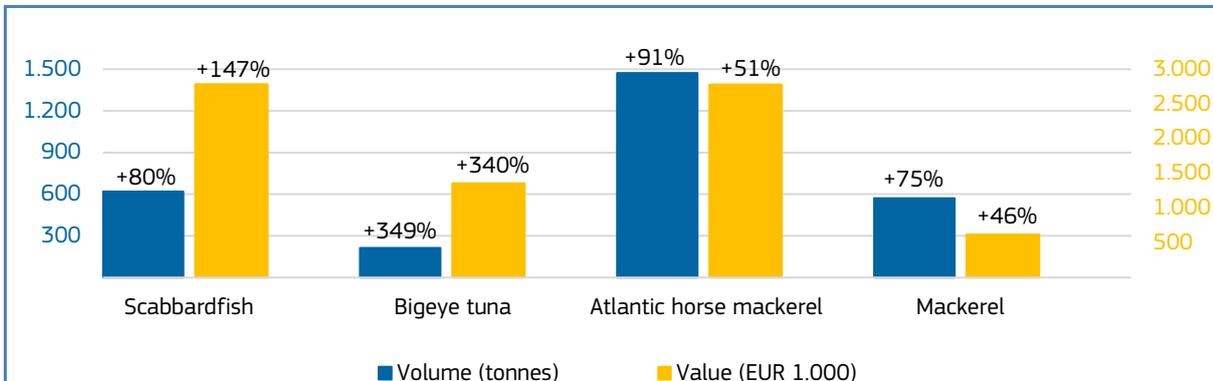
Percentages show change from the previous year.

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

 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Mar 2023 vs Jan-Mar 2022	EUR 66 million, +3%	15.535 tonnes, +7%	Scabbardfish, Atlantic horse mackerel, bigeye tuna, mackerel.	In March 2023 compared to March 2022, scabbardfish recorded significant increases in first sales value and volume. This species is very specific to the Portuguese island Madeira. Demand from the tourist islands has increased (linked to the increase in tourism). This has influenced the unit price, causing an upward trend in scabbardfish first sales value and pull effect on the volume of catches.
Mar 2023 vs Mar 2022	EUR 24,9 million, +25%	5.991 tonnes, +37%	Scabbardfish, bigeye tuna, Atlantic horse mackerel, mackerel.	Increase in first sales of bigeye tuna could be explained by a healthy stock ⁷ and an earlier start to the fishing season which usually starts in April. This context is aligned with the stock assessment published in 2022 (ICCAT, 2022). In this document, it was agreed that, if the stock is in a good status, the allocation criteria eliminate various exemptions in the catch limit provisions and increasing the TAC in 2023.

⁷ <https://correiodosacores.pt/NewsDetail/ArtMID/383/ArticleID/44542/Governo-fixa-novos-limites-por-embarca231227o-224-pesca-de-atum-patudo-no-mar-dos-A231ores>

Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, MARCH 2023**

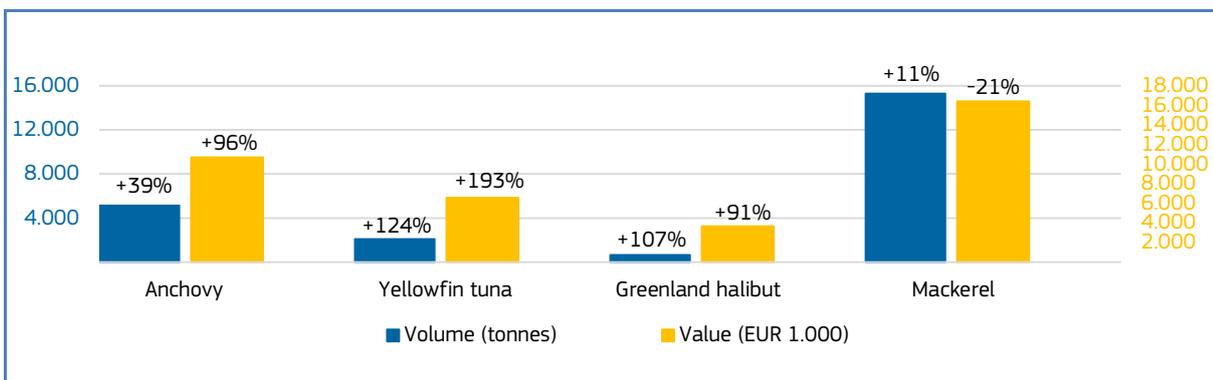


Percentages show change from the previous year.

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

 Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Mar 2023 vs Jan-Mar 2022	EUR 321,7 million, +1%	95.210 tonnes, +3%	Yellowfin tuna, anchovy, cod, mackerel.	First sales of yellowfin tuna recorded high increases in March 2023 compared to March 2022. The volume reported is aligned with previous months in past years (2021 and 2020). The atypical quantity fished in the months being compared explains the abrupt differences. The value of this product also increased as the volume of catches. However, the current increase in operating costs (mainly fuel) and inflation are reflected in the prices. This unit price increase thus directly affects the total amount of tuna sold.
Mar 2023 vs Mar 2022	EUR 131,4 million +7%	46.398 tonnes, +14%	Anchovy, yellowfin tuna, Greenland halibut, mackerel.	

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, MARCH 2023**

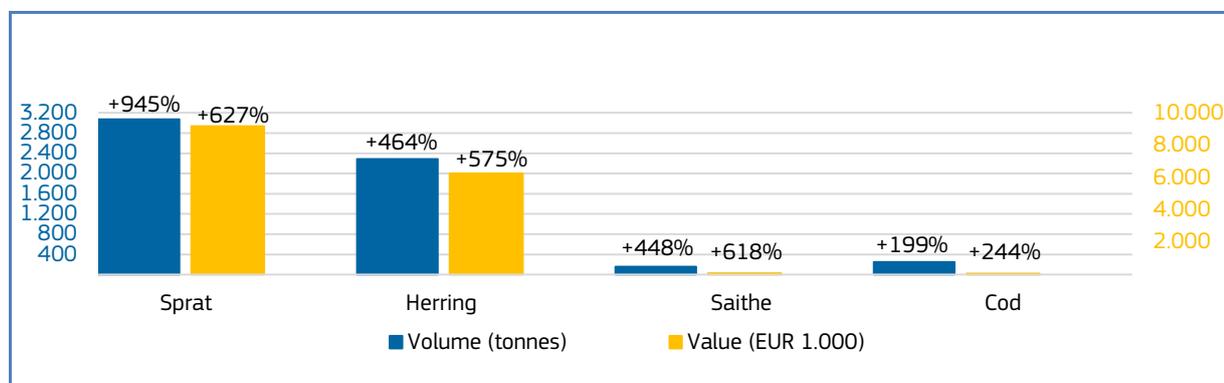


Percentages show change from the previous year.

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

 Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Mar 2023 vs Jan-Mar 2022	EUR 13,7 million, -14%	18.695 tonnes, -34%	Sprat, mackerel, other marine fish*, cold-water shrimps.	In March 2023 compared to March 2022, total first sales value and volume increased significantly, due mainly to higher sales of cod, haddock, saithe, herring, and supplies of sprat. It was noticed that supplies of cod, herring and sprat were quite low in February 2023 compared to March 2023. and that caused higher demand, but also rises in fish average prices. Weather conditions, fishing capacity and resources enabled an increase in fishing effort, increasing supply to the market in March 2023. One of the reasons for a significant increase in sales of sprat in March 2023 compared to March 2022 might be market demand in Sweden, due to low supply in January and February 2023. In March 2022, only 12% of the sprat landed by the Swedish fleet was sold in Sweden, whereas in March 2023, sales exceeded landings by the Swedish fleet by 17%. It might thus be assumed that there were some supplies of sprat from a foreign fleet.
Mar 2023 vs Mar 2022	EUR 8,2 million, +104%	15.986 tonnes, +470%	Sprat, herring, saithe, cod.	

Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, MARCH 2023**

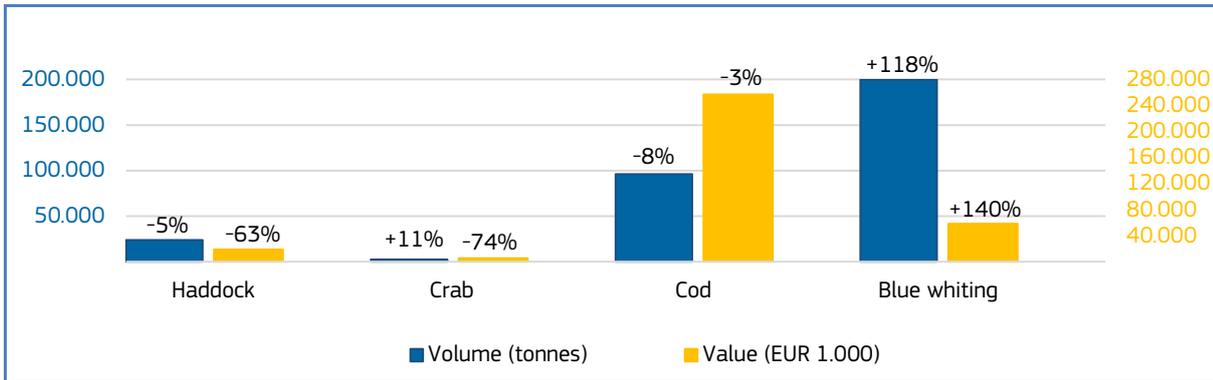


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2023 vs Jan-Mar 2022	EUR 999,2 million, -3%	1.035.454 tonnes, +13%	Value: cod, crab, haddock, mackerel. Volume: blue whiting, saithe, seaweed and other algae*.
Mar 2023 vs Mar 2022	EUR 429,3 million, -5%	469.827 tonnes, +26%	Value: Haddock, crab, cod. Volume: blue whiting, other crustaceans*, cold-water shrimps.

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, MARCH 2023**

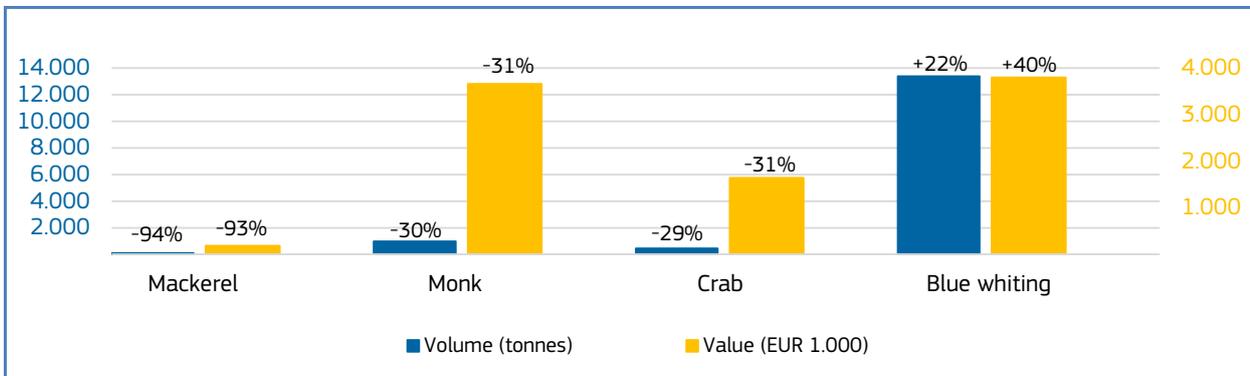


Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 16. **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
Jan-Mar 2023 vs Jan-Mar 2022	EUR 168,7 million, +4%	97.473 tonnes, +10%	Norway lobster, mackerel, cod, haddock.
Mar 2023 vs Mar 2022	EUR 40,6 million, -12%	26.977 tonnes, +2%	Value: mackerel, monk, crab. Volume: blue whiting, haddock, whiting, cod.

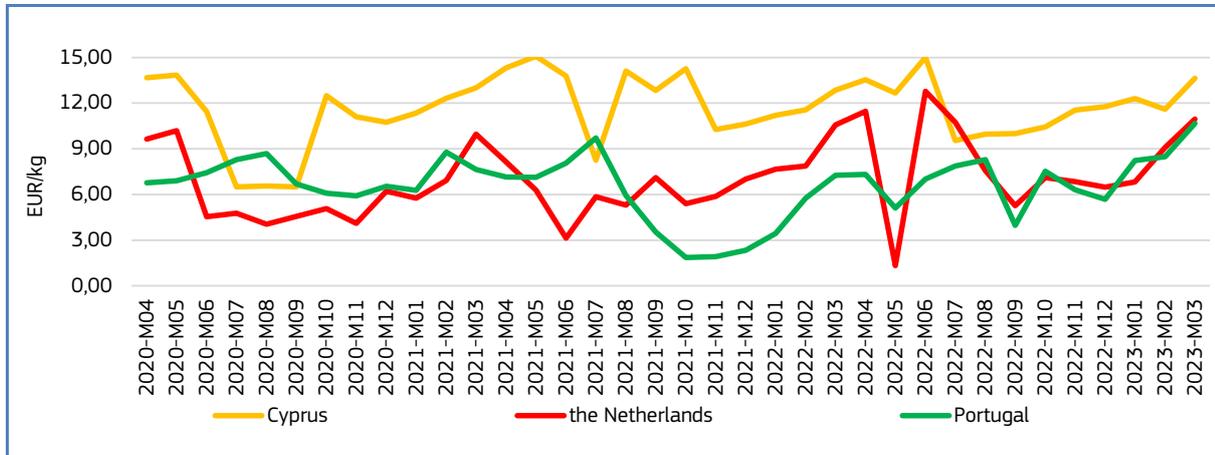
Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, MARCH 2023**



Percentages show change from the previous year.

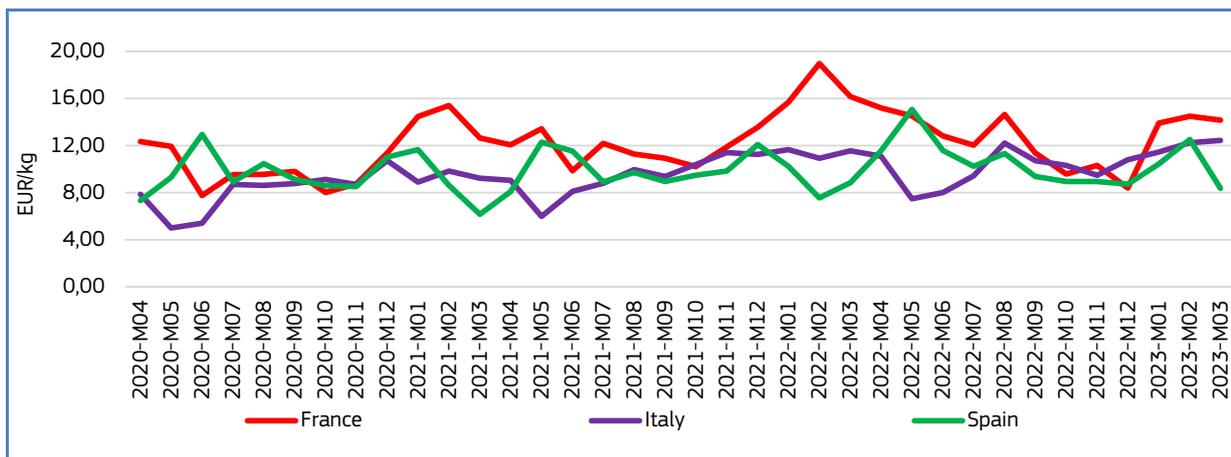
1.4. Comparison of first sales prices of selected species in selected countries⁸

Figure 15. **FIRST SALES PRICES OF SQUID IN CYPRUS, THE NETHERLANDS AND PORTUGAL**



EU first sales of **squid** occur in several countries including **Cyprus**, as well as **the Netherlands** and **Portugal**. In March 2023, the average first-sales prices of squid were 13,63 EUR/kg in Cyprus (up by 18% from the previous month and up by 6% from the previous year); 10,96 EUR/kg in the Netherlands (up from February 2023 by 21% and up from March 2022 by 4%); and 10,67 EUR/kg in Portugal (up from both the previous month and year by 26% and 47% respectively). In March 2023, supply increased in Cyprus (+3%) and the Netherlands (+293%) and decreased in Portugal (-69%) relative to the previous year. Supply is seasonal in the three countries analysed, with volume peaking in similar periods of the year: between November and March in Cyprus, between October and February in the Netherlands and between September and December in Portugal. Between November 2022 and March 2023, first-sale volume increased greatly in the Netherlands, reaching the maximum volume of 173 tonnes in February 2023. Between months 04/2020 to 03/2023, prices fluctuated highly in the three markets analysed, reaching the maximum value of 15,07 EUR/kg in Cyprus in May 2021. In the period analysed in the Netherlands, prices ranged between 1,32 EUR/kg (05/2022) and 12,77 (06/2022). Prices increased in Portugal, reaching the highest value of 10,67 in March 2023, but experiencing a big fall in price between September 2021 and January 2022 due probably to the high supply recorded.

Figure 16. **FIRST SALES PRICES OF BLUEFIN TUNA IN FRANCE, ITALY, AND SPAIN**

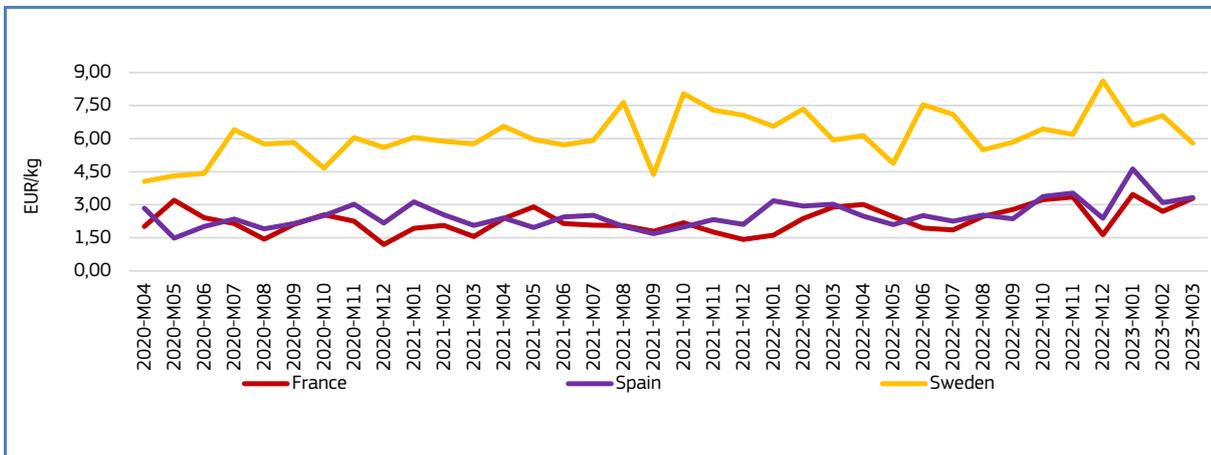


EU first sales of **bluefin tuna** occur predominantly in **France**, **Italy** and **Spain**. In March 2023, the average first-sales prices of bluefin tuna were: 14,16 EUR/kg in France (down by 2% from the previous month and down by 12% from March 2022); 12,44 EUR/kg in Italy (up by 2% from previous month and up by 8% from March 2022) and 8,38 EUR/kg in Spain (down from both the previous month and year by 33 and 5% respectively). In March 2023, supply increased in France (+120%) and Spain (+70%) and decreased in Italy (-18%), relative to the previous year. Supply is highly seasonal, and peaks occur in similar periods in the three countries analysed. Supply peaks mainly in July and August in France, and in May and June in Italy and

⁸ First sales data updated on 17.5.2023.

Spain. Between the months 04/2020 to 03/2023, prices increased in the three markets analysed, showing seasonal peaks in February, and reaching the highest value of 18,97 EUR/kg in February 2022. Prices showed a progressive increase in Italy with seasonal drops in prices in May and June due to the high supply. Prices highly fluctuated in Spain and showed peaks in prices with high supply in May and June.

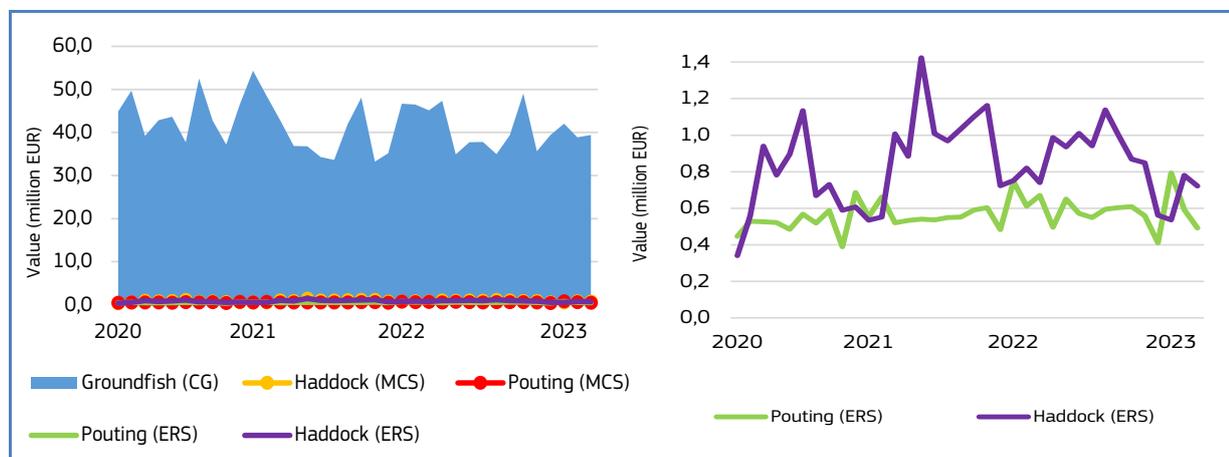
Figure 17. **FIRST SALES PRICES OF WITCH FLOUNDER IN FRANCE, ITALY AND SPAIN.**



EU first sales of **witch flounder** occur in several countries as well as in **France, Spain** and **Sweden**. In March 2023, the average first-sales prices of witch flounder were 3,29 EUR/kg in France (up from the previous month by 22% and up from the previous year by 14%); 3,33 EUR/kg in Spain (up from both the previous month by 8% and from March 2022 by 10%); and 5,79 EUR/kg in Sweden (down by 18% from February 2023, and by 2% from March 2022). In March 2023, supply increased in Spain (+42%), and Sweden (+9%) and decreased in France (-47%), relative to the previous year. In France supply peaks in December, February and March, in Spain volumes peak in May, September and December and in Sweden volumes seems to peak between January and April. Between the months 04/2020 to 03/2023, prices increased in the three markets analysed showing slight fluctuations in France between 1,20 EUR/Kg and 3,47 EUR/kg and in Spain between 1,48 EUR/Kg and 4,62 EUR/Kg. In Sweden prices increased reaching the maximum value of 8,62 in December 2022.

1.5. Commodity group of the month: groundfish⁹

Figure 18. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES¹⁰, APRIL 2020 – MARCH 2023**



In March 2023, the “groundfish” commodity group (CG¹¹) recorded the 6th highest value and the 7th highest first-sales volume out of the 10 CGs in the countries monitored by EUMOFA¹². In the reporting countries covered by the EUMOFA database, first sales of “groundfish” totalled a value of EUR 46,7 million and a volume of 39.433 tonnes, representing an 8% increase in value and a 4% increase in volume compared to March 2022. In the past 36 months, the highest first-sales value of groundfish was registered in February 2021 at EUR 54,4 million.

The groundfish commodity group includes 14 main commercial species (MCS): Alaska pollock, blue whiting, cod, grenadier, haddock, hake, ling, pollack, pouting, redfish, saithe, toothfish, whiting, and the grouping of other groundfish species¹³. At the Electronic Recording and Reporting System (ERS) level, haddock (2%) and pouting (1%) together accounted for 3% of the total first-sales value for “groundfish” recorded in March 2023.

1.6. Focus on haddock



Source: © Scandinavian
Fishing Year Book

Haddock (*Melanogrammus aeglefinus*) is a member of the family Gadidae. Adults are mostly found at 80-200 m over rock, sand, gravel or shells, usually at temperatures between 4° and 10 °C. Haddock mainly feeds on small bottom-living organisms including crustaceans, molluscs, echinoderms, worms and fishes (sand lance, capelin, silver hake, American eel, herring and argentine). It is a batch spawner undertaking extensive migrations in the Barents Sea and Iceland.¹⁴ Haddock is mostly found in the Northeast Atlantic, from the Bay of Biscay to

Spitzbergen, in the Barents Sea to Novaya Zemlya, around Iceland, and rarely present off southern Greenland. In the Northwest Atlantic it inhabits Cape May, New Jersey to the Strait of Belle Isle. Minimum conservation reference sizes are 30 cm in the North Sea, 30 cm in the whole area of North and Southwestern waters as well as in the Northeast Atlantic Fisheries Commission (NEAFC) area¹⁵. It is subject to EU TAC regulations¹⁶.

Haddock is caught by yarns, hooks and lines, draws and rushes, trawls and by vods¹⁷. For human consumption haddock is sold fresh, chilled as fillets, frozen, smoked and canned, but is also utilised for fish meal and animal feeds. It can be consumed steamed, fried, broiled, boiled, microwaved and baked¹⁸.

⁹ First sales data updated on 17.5.2023.

¹⁰ Norway and the UK excluded from the analyses.

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

¹² More data on commodity groups can be found in Table 1.2 of the Annex.

¹³ Greater argentine accounts for the highest first-sales value and volume within the miscellaneous groundfish category.

¹⁴ <https://www.fishbase.se/summary/melanogrammus-aeglefinus.html>

¹⁵ Regulation (EU) 2019/1241: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R1241&rid=4>

¹⁶ Council Regulation (EU) 2020/123: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32020R0123&from=EN>

¹⁷ Regulation (EU) 2019/1241 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R1241&rid=4>

¹⁸ <https://www.fishbase.se/summary/melanogrammus-aeglefinus.html>

We have covered **Haddock** in the following *Monthly Highlights*:

First sales: MH 2/2018 (Denmark, France, the United Kingdom), MH 5/2016 (the United Kingdom), MH 8/2015 (Norway), MH 4/2014 (Sweden), MH April/2013 (the United Kingdom); MH October/2013 (Denmark)

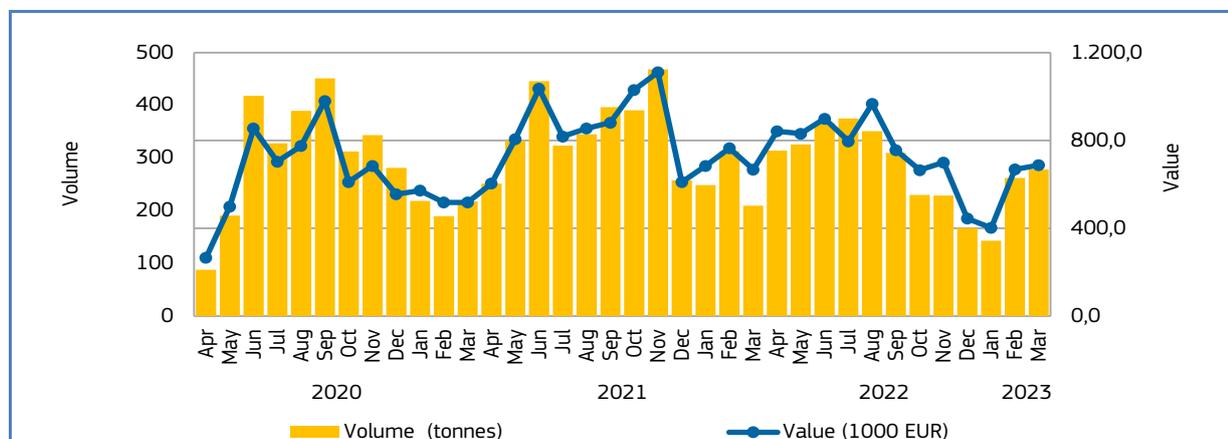
Topic of the month: Haddock in the UK (MH May/2013, MH 6/2015), Haddock in the EU (MH 7/2017).

Selected countries

Table 17. **COMPARISON OF HADDOCK FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "GROUND FISH" IN SELECTED COUNTRIES**

Haddock		Changes in haddock first sales Jan-Mar 2023 (%)		Contribution of haddock to total "groundfish" first sales in March 2023 (%)	Principal places of sale Jan-Mar 2023 in terms of first-sales value
		Compared to Jan-Mar 2022	Compared to Jan-Mar 2021		
France	Value	-17%	+9%	6%	Saint Quay Portrieux, Guilvinec, Erquy.
	Volume	-11%	+9%	6%	
the Netherlands	Value	-18%	+6%	0,05%	Urk, IJmuiden/Velsen, Lauwersoog.
	Volume	-9%	+60%	0,03%	
Sweden	Value	+213%	+1102%	18%	Göteborg, Smögen.
	Volume	+224%	+1182%	26%	

Figure 19. **HADDOCK: FIRST SALES IN FRANCE, APRIL 2020 - MARCH 2023**



Over the past 36 months in **France**, the highest first-sales of haddock were in November 2021 when 468 tonnes were sold for EUR 1,1 million. The main fishing season occurs when the sea temperature tends to be higher, from May to September. In warmer periods of the year haddock migrates to inshore waters, while during winter it moves to deeper waters¹⁹.

¹⁹ DFO Atlantic Fisheries Stock Status Report 96/68E <https://waves-vagues.dfo-mpo.gc.ca/Library/40637499.pdf>

Figure 20. **FIRST SALES: COMPOSITION OF “GROUND FISH” (ERS LEVEL) IN FRANCE IN VALUE AND VOLUME, MARCH 2023**

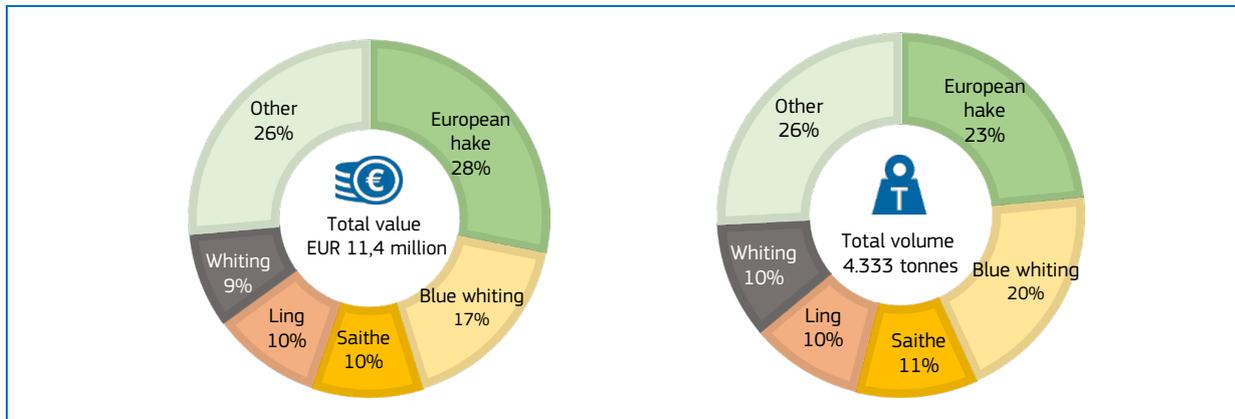
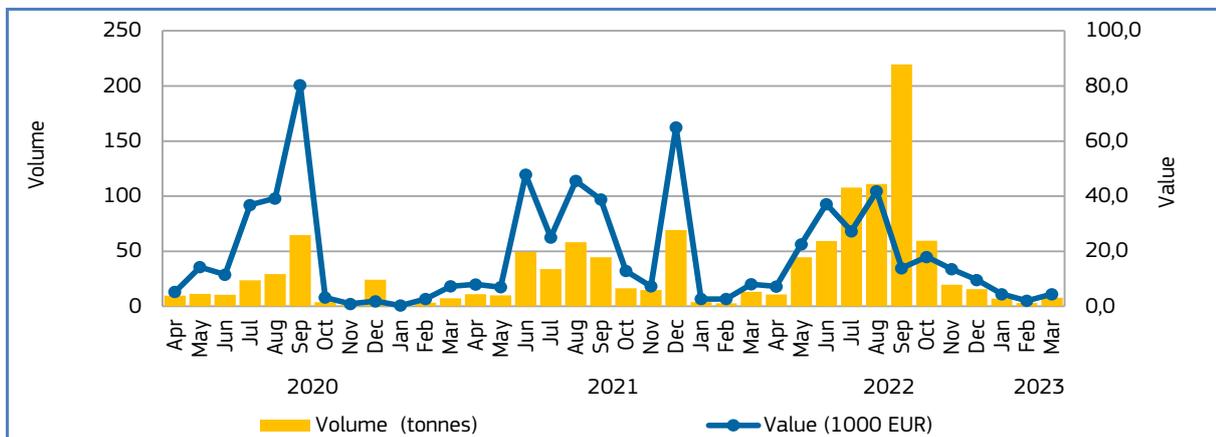


Figure 21. **HADDOCK: FIRST SALES IN THE NETHERLANDS, APRIL 2020 - MARCH 2023**



Over the past 36 months in **the Netherlands**, the highest first-sales of haddock were in 2022, peaking in September 2022 when 220 tonnes were sold for EUR 14,000. The haddock fishery is the most intense during warmer months, while in winter supply is limited due to less favourable weather conditions and migratory patterns of the species.

Figure 22. **FIRST SALES: COMPOSITION OF “GROUND FISH” (ERS LEVEL) IN THE NETHERLANDS IN VALUE AND VOLUME, MARCH 2023**

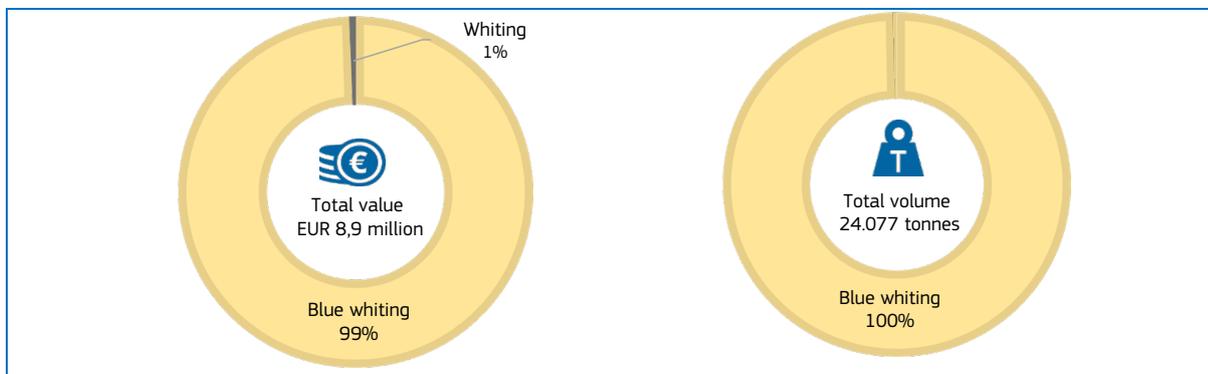
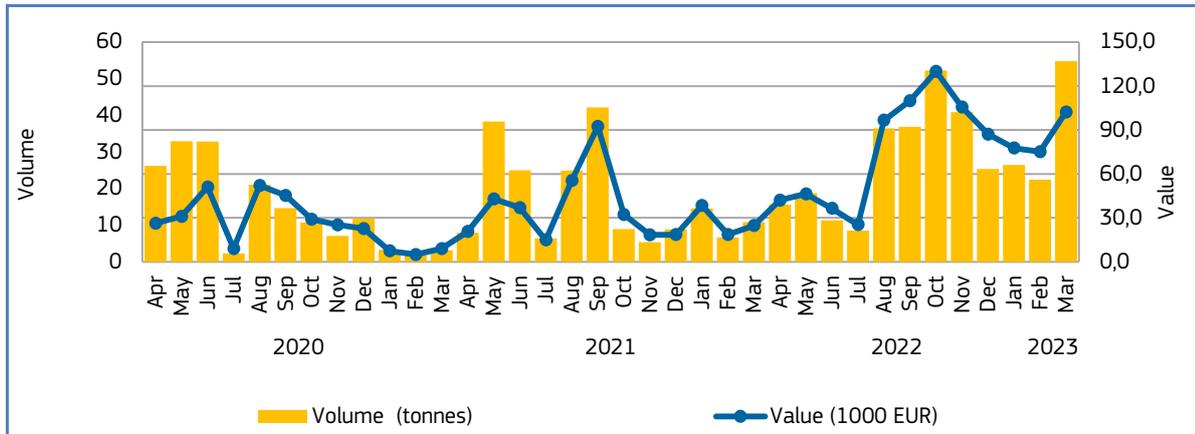
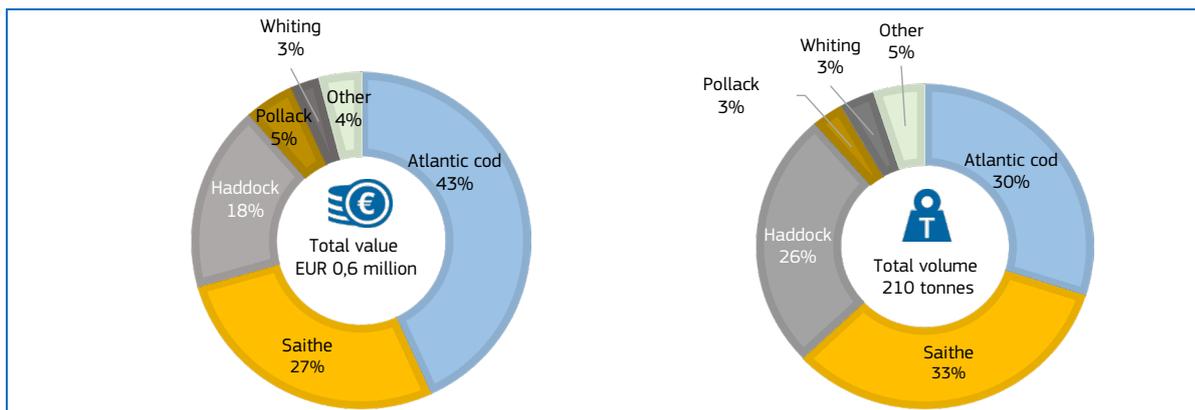


Figure 23. **HADDOCK: FIRST SALES IN SWEDEN, APRIL 2020 - MARCH 2023**



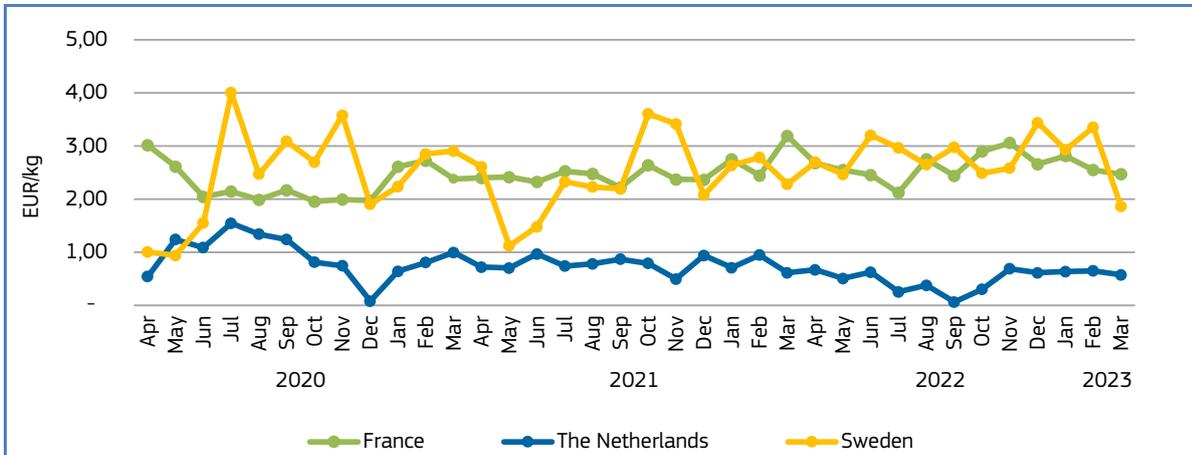
Over the past 36 months in **Portugal**, first sales of haddock have shown fluctuations in total volume, and were the lowest among the countries surveyed. The highest first-sales volume of haddock occurred in March 2023 when 55 tonnes were sold for EUR 102.000. As in other countries surveyed, lower first-sales were recorded in colder months each year, with the exception of March 2023.

Figure 24. **FIRST SALES: COMPOSITION OF “GROUND FISH” (ERS LEVEL) IN SWEDEN IN VALUE AND VOLUME, MARCH 2023**



Price trend

Figure 25. **HADDOCK: FIRST-SALES PRICES IN SELECTED COUNTRIES, APRIL 2020 - MARCH 2023**



Over the 36-month observation period (April 2020 to March 2023), the weighted average first-sales price of haddock in **France** was 2,42 EUR/kg, 5% higher than in **Sweden** (2,32 EUR/kg), and 324% higher than in **the Netherlands** (0,57 EUR/kg).

In **France** in March 2023, the average first-sales price of haddock (2,47 EUR/kg) decreased by 23% compared with March 2022 and increased by 4% compared with March 2021. Over the past 36 months, the average price ranged from 1,96 EUR/kg for 312 tonnes in October 2020 to 3,19 EUR/kg for 209 tonnes in March 2022.

In **the Netherlands** in March 2023, the average first-sales price of haddock (0,57 EUR/kg) decreased by 7% compared to the same month of 2022 and by 42% from March 2021. During the period observed, the lowest average price (0,06 EUR/kg for 220 tonnes) was in September 2022, while the highest average price (1,55 EUR/kg for 24 tonnes) was recorded in July 2020.

In **Sweden** in March 2023, the average first-sales price of haddock (1,87 EUR/kg) decreased by 18% from March 2022 and by 36% from March 2021. During the observed period, the average price ranged from 0,94 EUR/kg for 33 tonnes in May 2020 to 4,01 EUR/kg for 2,2 tonnes in July 2022.

1.7. Focus on pouting



Source: *Les poissons*
Gervais, H.

Pouting (*Trisopterus luscus*) is a member of the Gadidae family. It is a gregarious fish. Immature individuals often occur in large schools. It lives at a depth range of 30-100 m, mostly on the outer shelf, but moves inshore to depths of 50 m or less for spawning. Pouting mainly feeds on benthic crustaceans as well as on small fish, molluscs and polychaetes²⁰. *Trisopterus luscus* may be confused with *Trisopterus minutus* (poor cod) or with *Melanogrammus aeglefinus* (haddock). However, poor cod has a plain colour and narrower body while haddock is differently coloured and has a shorter chin barbel²¹. Pouting inhabits the Northeast Atlantic: from Norway to Morocco including the British Isles and offshore islands and the Skagerrak and can also be found in the western Mediterranean.

Pouting is mostly caught as bycatch by trawlers, and has recently also been used as food fish. Previously it was rare to see pouting for sale, but now it is possible to buy both pouting fillets and whole pouting as a cheaper and more sustainable alternative to premium white fish such as haddock and cod. Pouting is also processed as fishmeal or used to bait crab and lobster pots. They are commonly used as a ‘filler fish’ in cheap fish commodities such as fish pies, fish fingers and other frozen fish products²².

Selected countries

Table 18. COMPARISON OF POUTING FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF “GROUND FISH” IN SELECTED COUNTRIES

Pouting		Changes in pouting first sales Jan-Mar 2023 (%)		Contribution of pouting to total “groundfish” first sales in March 2023 (%)	Principal places of sales in Jan-Mar 2023 in terms of first-sales value
		Compared to Jan-Mar 2022	Compared to Jan-Mar 2021		
the Netherlands	Value	+5%	+140%	0,05%	Vlissingen, Scheveningen, IJmuiden/Velsen
	Volume	-48%	+23%	0,04%	
Portugal	Value	-9%	-12%	16%	Matosinhos, Aveiro, Peniche.
	Volume	-25%	-39%	11%	
Spain	Value	-17%	-24%	0,5%	Ondárroa, Santa Eugenia Ribeira, Pasajes.
	Volume	-24%	-32%	0,6%	

Figure 26. POUTING: FIRST SALES IN THE NETHERLANDS, APRIL 2020 - MARCH 2023



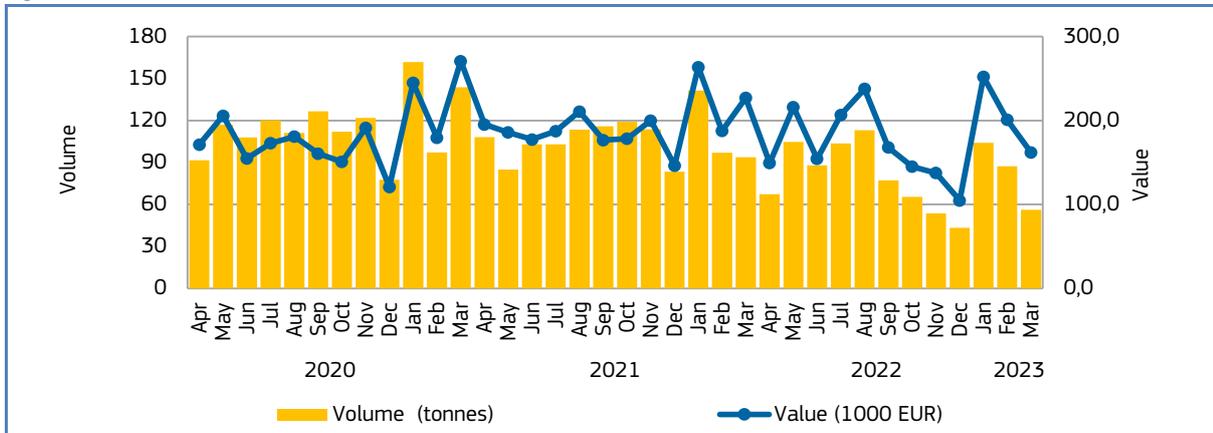
²⁰ <https://www.fishbase.se/summary/Trisopterus-luscus.html>

²¹ <https://www.marlin.ac.uk/species/detail/1876>

²² <https://britishseafishing.co.uk/pouting/>

In **the Netherlands**, over the observed 36-month period, the highest first sales volume of pouting occurred in December 2021 when 35 tonnes were sold. Lower sales were observed in summer each year, when they ranged from about 2 to 4 tonnes.

Figure 27. **POUTING: FIRST SALES IN PORTUGAL, APRIL 2020 - MARCH 2023**



In **Portugal** over the past 36 months, first sales volume was highest in January 2021 with 162 tonnes sold for EUR 245.000. In general, lower supply is recorded in colder months when weather conditions are usually not favourable for fishing activity. The lowest supply in the observed period occurred in December 2022 when 43 tonnes were sold.

Figure 28. **FIRST SALES: COMPOSITION OF "GROUND FISH" (ERS LEVEL) IN PORTUGAL IN VALUE AND VOLUME, MARCH 2023**

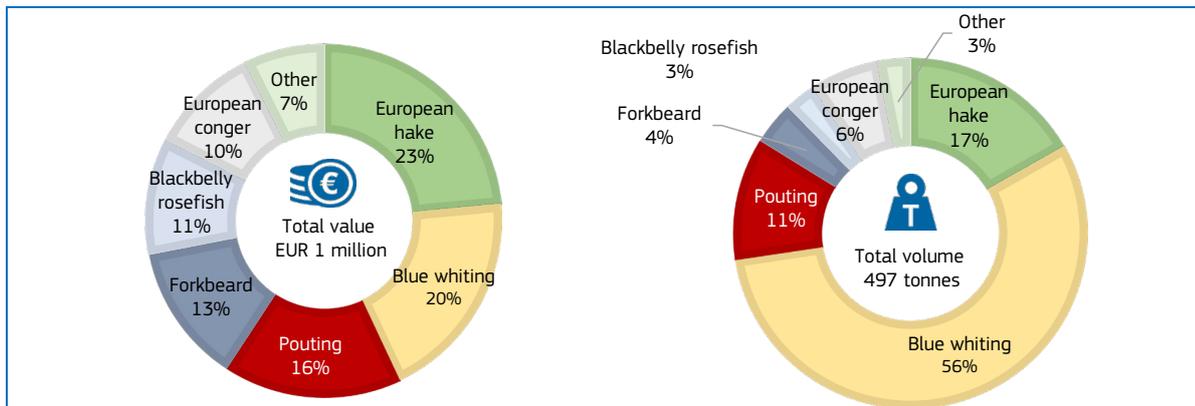
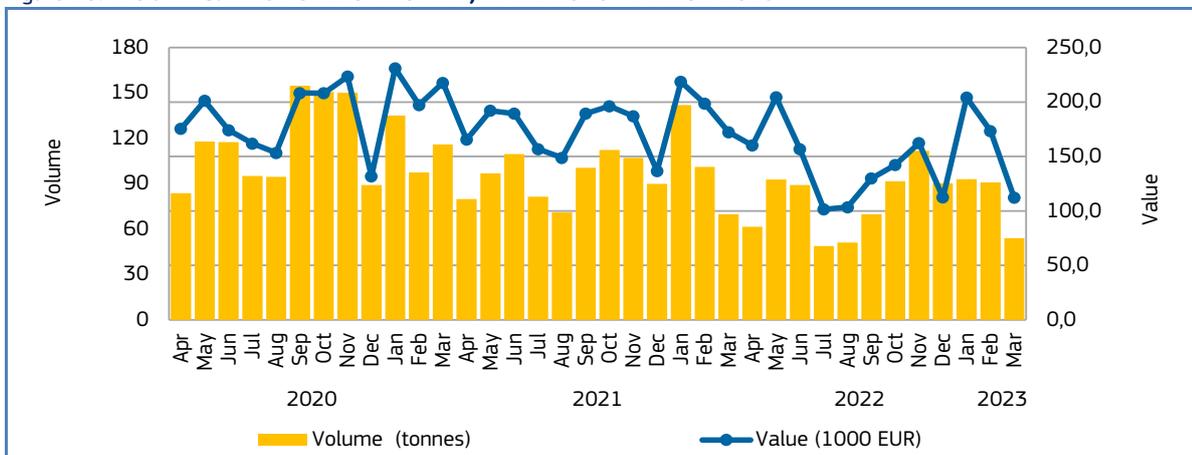
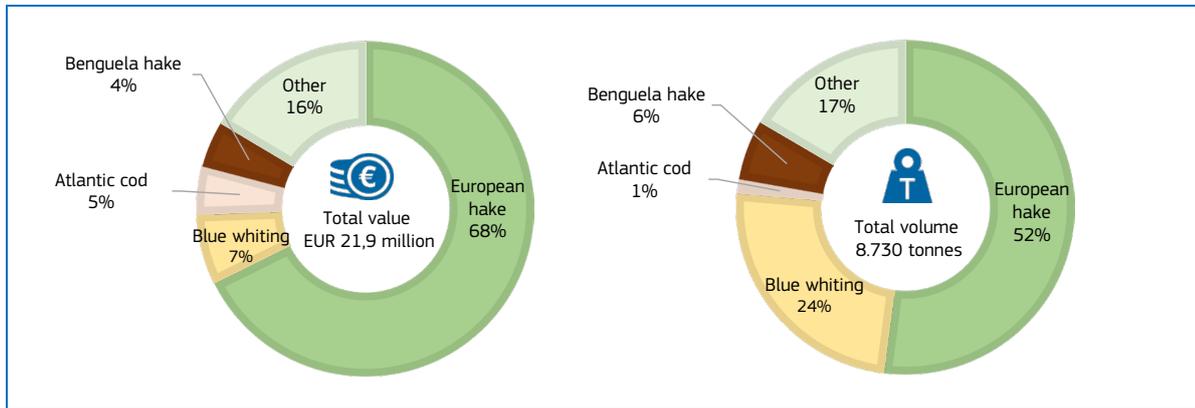


Figure 29. **POUTING: FIRST SALES IN SPAIN, APRIL 2020 - MARCH 2023**



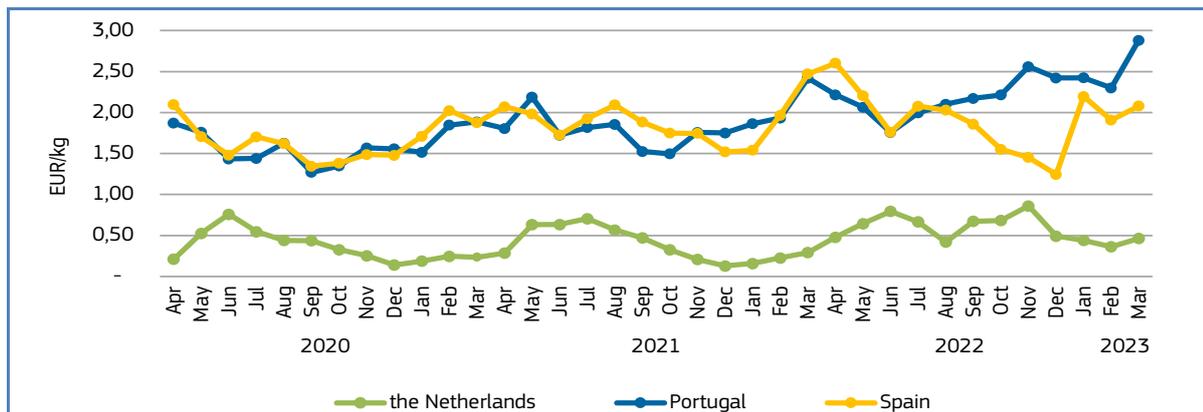
In **Spain** over the past 36 months, the highest first sales were registered September and October 2020, when 155 and 151 tonnes were sold for about EUR 208.000. The lowest first sales occurred in summer, amounting to 49 and 51 tonnes in July and August 2022.

Figure 30. **FIRST SALES: COMPOSITION OF “GROUND FISH” (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, MARCH 2023**



Price trend

Figure 31. **POUTING: FIRST-SALES PRICES IN SELECTED COUNTRIES, APRIL 2020 - MARCH 2023**



Over the 36-month observation period (April 2020 – March 2023), the weighted average first-sales price of pouting in **Portugal** was 1,84 EUR/kg, 447% higher than that of the **Netherlands** (0,34 EUR/kg), and 4% above the average price in **Spain** (1,77 EUR/kg).

In **the Netherlands** in March 2023, the average first-sales price of pouting (0,46 EUR/kg) increased by 59% compared to March 2022 and by 98% compared to March 2021. The lowest average price was recorded in December 2021 at 0,13 EUR/kg for 35 tonnes, while the highest average price of 0,86 EUR/kg for 6 tonnes was recorded in November 2022.

In **Portugal** in March 2023, the average first-sales price of pouting was 2,88 EUR/kg, 19% and 53% higher than in March 2022 and 2021 respectively. The lowest price in the past 36 months was recorded in September 2020, at 1,27 EUR/kg for 127 tonnes. The highest price (2,88 EUR/kg for 56 tonnes) was recorded in March 2023.

In **Spain** in March 2023, the average first-sales price of pouting was 2,08 EUR/kg. That was 16% less than the first sales price in March 2022 and 11% higher than in March 2021. The lowest average price was recorded in December 2022, at 1,25 EUR/kg for 90 tonnes. The highest average price at 2,60 EUR/kg for 62 tonnes was recorded in April 2022.

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 “groundfish”²³.

Data analysed in the section “Extra-EU imports” are extracted from EUMOFA, as collected from the European Commission²⁴.

Table 19. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THE THREE MOST RELEVANT FISHERIES AND AQUACULTURE PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 15/2023	Preceding 4-week average	Week 15/2022	Notes
Fresh whole Atlantic salmon imported from Norway (<i>Salmo salar</i> , CN code 03021400)	Price (EUR/kg)	10,21	9,82 (+4%)	10,26 (0%)	From week 01/2023 to week 15/2023 prices showed an increasing trend, as well as in the past three years. Prices ranged between 11,28 EUR/kg (week 16/2022) and 4,32 EUR/kg (week 44/2020)
	Volume (tonnes)	10.633	9.402 (+13%)	5.672 (+87%)	Volumes showed high fluctuation with values ranging between 5.672 tonnes (week 15 of 2022) and 19.497 tonnes (week 35 of 2022). Supply showed a clear seasonality with peaks occurring most often in weeks 35/37, 40/42 and 49/50. Lowest peak seemed to occur in weeks 13/15 and 51/52.
Frozen Alaska pollock fillets imported from China (<i>Theragra chalcogramma</i> , CN code 03047500)	Price (EUR/kg)	3,65	3,68 (-1%)	3,29 (+11%)	Between week 01/2023 and week 15/2023 prices showed some fluctuations and a slight decrease. However, prices have been quite stable after the price drop between week 45/2022 and week 01/2023. Overall, in the period analysed prices showed an increasing trend ranging between 1,84 EUR/kg (week 48/2022) and 4,03 EUR/kg (week 41/2022).
	Volume (tonnes)	2.337	2.368 (-1%)	2.050 (+14%)	Weekly volumes over the last three years ranged from 843 tonnes (week 17/2022) to 6.758 tonnes (week 48/2022). Supply shows fluctuations but does not seem to follow a clear seasonality.
Frozen tropical shrimp imported from Ecuador (genus <i>Penaeus</i> , CN code 03061792)	Price (EUR/kg)	5,47	5,56 (-2%)	6,20 (-12%)	In the period analysed weekly prices increased slightly and fluctuated between 4,27 EUR/kg (week 38 of 2020) to 7,19 EUR/kg (week 41 of 2022). Prices also increased between week 1/2023 and week 15/2023.
	Volume (tonnes)	2.012	1.827 (+10%)	4.654 (-57%)	In the period analysed volumes showed high fluctuations, with minimum tonnes of 891 (week 09/2023) and maximum 4.925 tonnes (week 33/2021). Peaks in supply seemed to occur most often between weeks 10/11, 14/16, 31/33 and 45/46.

²³ The featured species of the commodity group of the month are fresh or chilled Cape from Namibia, fresh or chilled haddock from Norway and frozen meat, whether or not minced, of Alaska from United States. The three randomly selected species this month are frozen yellowfin tunas from Seychelles, frozen fillets of Cape hake from Namibia and frozen fillets of blue grenadier from New Zealand.

²⁴ Last update: 15.5.2023

Figure 32. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY, 2020 - 2023**

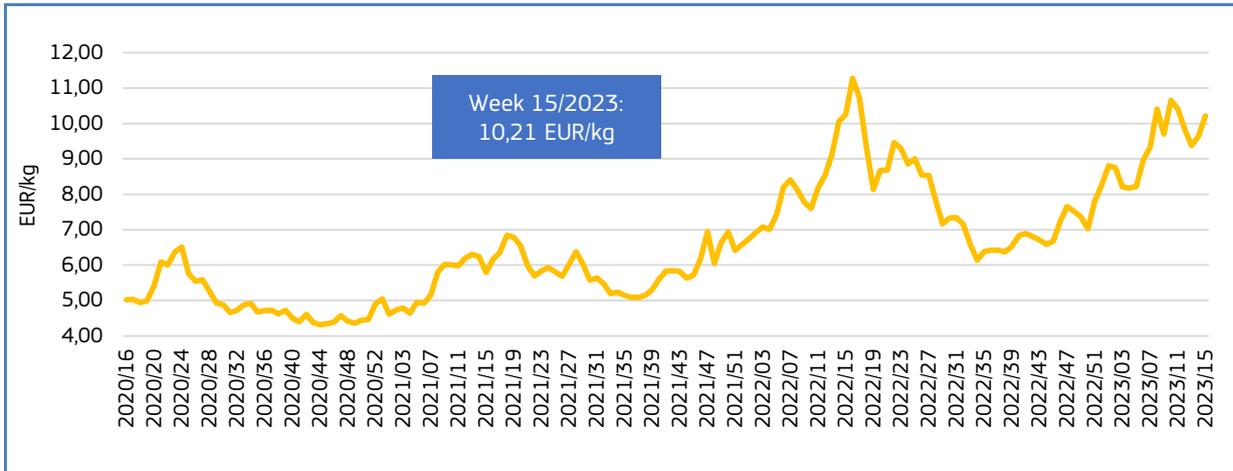


Figure 33. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2020 - 2023**

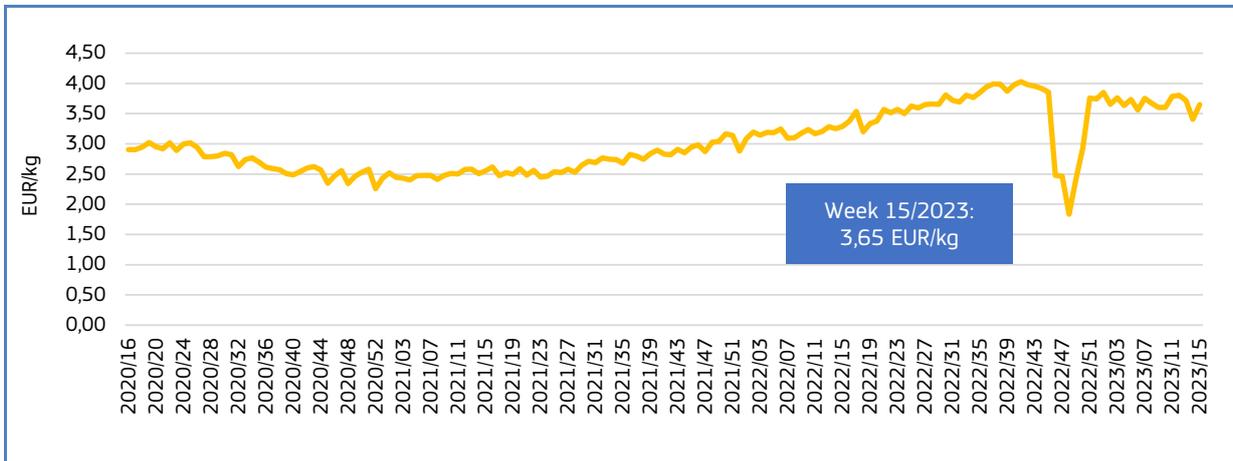


Figure 34. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2020 - 2023**

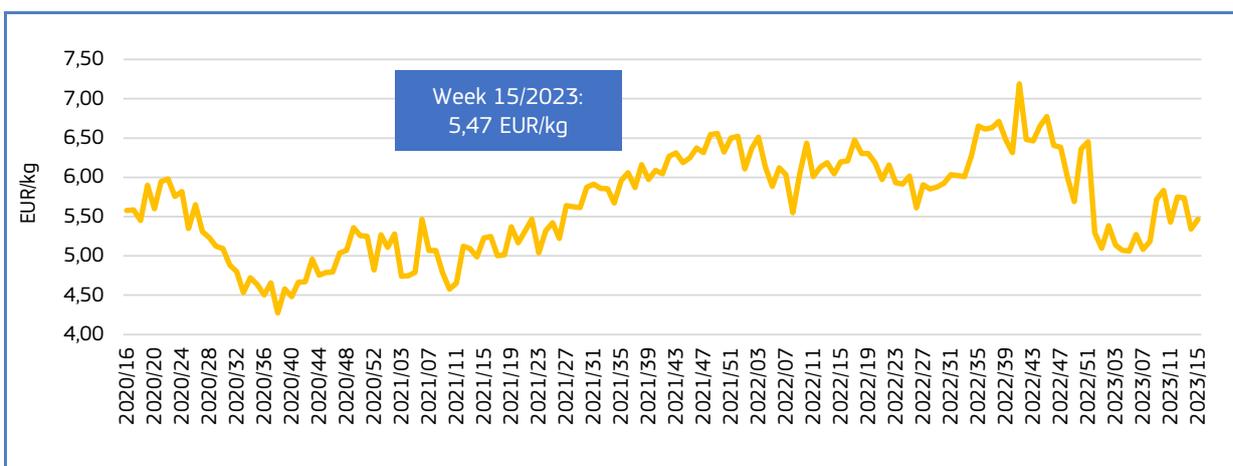


Table 20. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 15/2023	Preceding 4-week average	Week 15/2022	Notes
Fresh or chilled Cape hake "shallow-water hake" and deepwater hake "deepwater Cape hake" "from Namibia (<i>Merluccius capensis</i> , <i>Merluccius paradoxus</i> , CN code 03025411)	Price (EUR/kg)	6,87	6,74 (+2%)	5,74 (+20%)	Between week 16/2020 and week 15/2023 prices fluctuated showing a slight increasing trend. Prices ranged from 5,05 EUR/kg (week 04/2021) to 7,11 EUR/kg (week 09/2022). 50% of the weekly prices were between 6,00 EUR/kg and 7,00 EUR/kg.
	Volume (tonnes)	62	55 (+13%)	24 (+162%)	Supply seems to peak most often between weeks 02/03, 14/16 and 49/51. Volumes showed high fluctuations ranging from 3 tonnes (week 20/ 2020) to 106 tonnes (week 49/2022). 58% of the weekly supply was less than 40 tonnes.
Fresh or chilled haddock from Norway (<i>Melanogrammus aeglefinus</i> , CN code 03025200)	Price (EUR/kg)	2,52	2,27 (+11%)	2,42 (+4%)	Between week 16/2020 and week 15/2023 prices showed an increasing trend. Prices fluctuated from 1,13 EUR/kg (week 23/2021) to 3,70 EUR/kg (week 06/2023). 40% of the weekly prices were between 1,50 EUR/kg and 2,00 EUR/kg.
	Volume (tonnes)	62	166 (-63%)	31 (+97%)	Highest peaks seem to occur most often in weeks 10, 19/23, 31/33 and the highest peaks were registered in 2020. Volumes show high fluctuations, and the trend has been decreasing over the period analysed. Supply ranged from 5 tonnes (week 51/2021) to 864 tonnes (week 21/2020). 42% of the weekly volumes were less than 100 tonnes.
Frozen meat, whether or not minced, of Alaska pollack (excl. fillets and surimi) from United States (<i>Theragra chalcogramma</i> , CN code 03049490)	Price (EUR/kg)	2,59	2,61 (-1%)*	2,38 (+9%)	Prices showed an upward trend ranging between 1,41 EUR/kg (week 34/2021) and 2,95 EUR/kg (week 46 of 2022). 45% of the weekly prices were between 2,00 and 2,50 EUR/kg.
	Volume (tonnes)	63	21 (+203%)*	44 (+43%)	Very high fluctuations in supply from 0,022 tonnes (week 28 of 2021) to 665 tonnes (week 02 of 2021). In the period analysed a decreasing trend in supply was observed. Supply showed strong fluctuations but did not seem to follow a clear seasonality. 40% of the weekly supply was higher than 80 tonnes.

*Data refers to week 11/14 of 2023

Figure 35. **IMPORT PRICE OF FRESH OR CHILLED CAPE HAKE FROM NAMIBIA, 2020 - 2023**

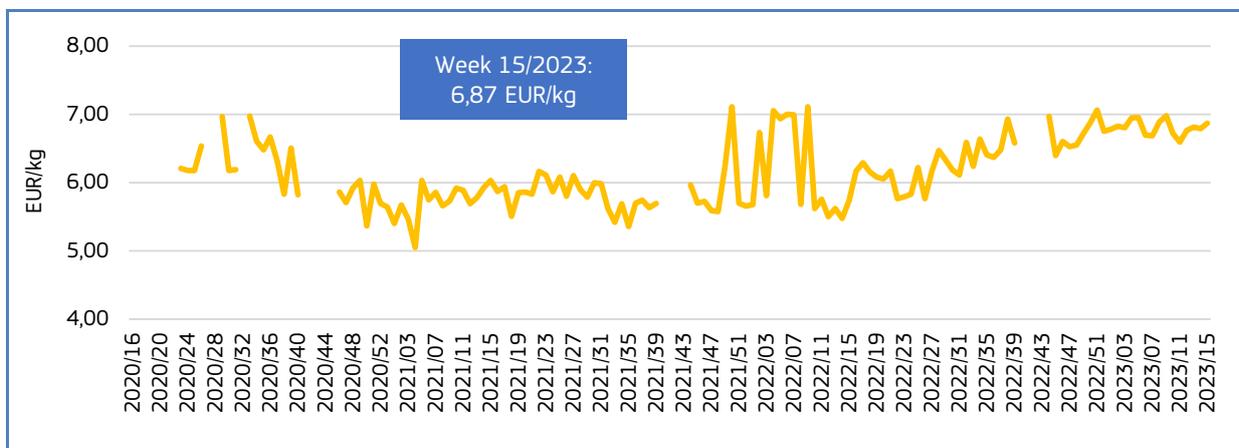


Figure 36. **IMPORT PRICE OF FRESH OR CHILLED HADDOCK FROM NORWAY, 2020 - 2023**

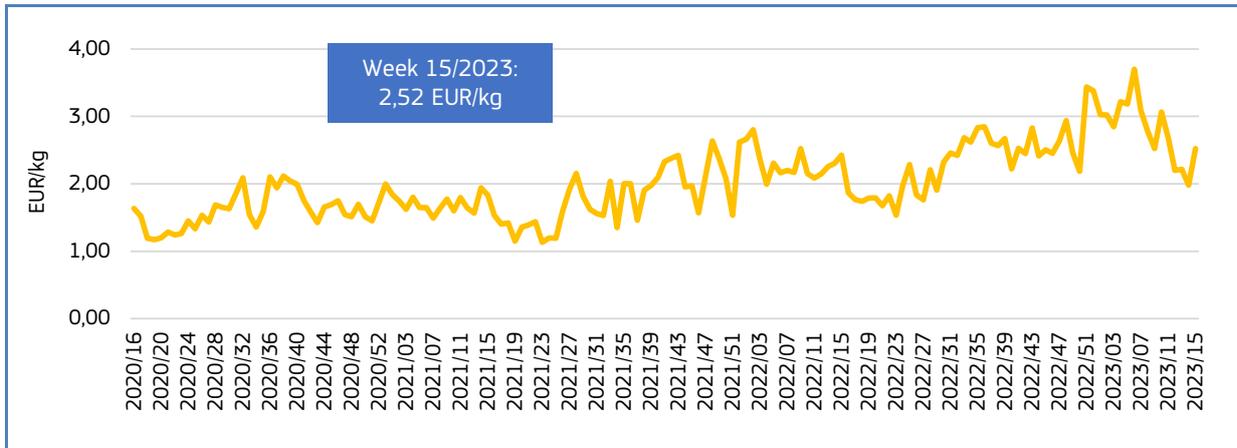
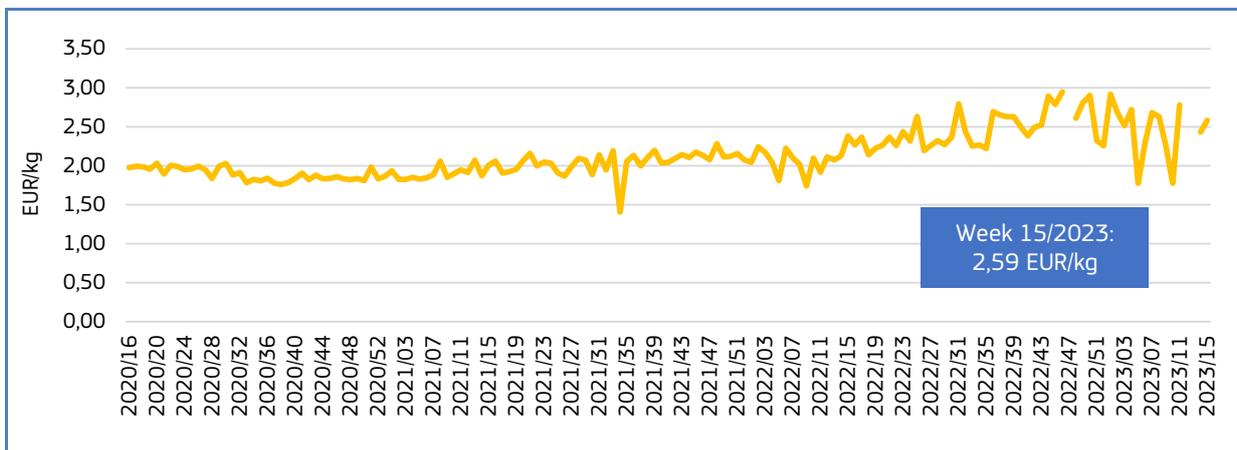


Figure 37. **IMPORT PRICE OF FROZEN ALASKA POLLACK FROM UNITED STATES, 2020 - 2023**



Between week 01/2023 and week 15/2023, the price of fresh or chilled **Cape hake** from **Namibia** showed a slight upward trend. Price ranged from 6,59 to 6,98 EUR/kg, and volume fluctuated greatly between 39 to 92 tonnes.

Between week 01/2023 and week 15/2023, the price of fresh or chilled **haddock** from **Norway** decreased. Price ranged from 1,98 to 3,70 EUR/kg, and supply strongly fluctuated between 41 kg and 246 tonnes.

In 2023, price of frozen **Alaska pollack** from **United States** showed a downward trend. Price ranged from 1,77 to 2,92 EUR/kg, and volume fluctuated strongly between 6 to 118 tonnes.

Table 21. **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 15/2023	Preceding 4-week average	Week 15/2022	Notes
Frozen yellowfin tunas (excl. for industrial manufacture of products of 1604) from Seychelles (<i>Thunnus albacares</i> , CN code 03034290)	Price (EUR/kg)	2,65	2,30 (+15%)*	3,28 (-19%)	Between week 16/2020 and week 15/2023 prices showed an increasing trend. Prices fluctuated from 1,33 EUR/kg (week 07/2021) to 3,87 EUR/kg (week 19/2022). 57% of the weekly prices were between 2,00 EUR/kg and 3,00 EUR/kg.
	Volume (tonnes)	78	203 (-61%)*	1.155 (-93%)	
Frozen fillets of Cape hake "shallow-water hake" and deepwater hake "deepwater Cape hake" "from Namibia (<i>Merluccius capensis</i> , <i>Merluccius paradoxus</i> CN code 03047411)	Price (EUR/kg)	5,19	4,86 (+7%)	4,20 (+24%)	In the period analysed prices followed an upward trend ranging between 3,71 EUR/kg (week 46/2021) and 6,15 EUR/kg (week 05 of 2023). 45% of the weekly prices were between 4,50 and 5,00 EUR/kg.
	Volume (tonnes)	857	1.026 (-16%)	1.307 (-34%)	
Frozen fillets of blue grenadier from New Zealand (<i>Macruronus novaezelandiae</i> , CN code 03061210)	Price (EUR/kg)	4,86	5,08 (-4%)	3,71 (+31%)	Prices showed a decreasing trend from week 16/2020 to week 20/2021 reaching the minimum price of 2,88 EUR/Kg followed by an increasing trend to the maximum price of 6,61 in week 47/2022. 51% of the weekly prices were between 3,00 and 4,00 EUR/kg.
	Volume (tonnes)	56	185 (-70%)	125 (-55%)	

*Data refers to week 11/12/13 of 2023

Figure 38. **IMPORT PRICE OF FROZEN YELLOWFIN TUNAS FROM SEYCHELLES, 2020 - 2023**

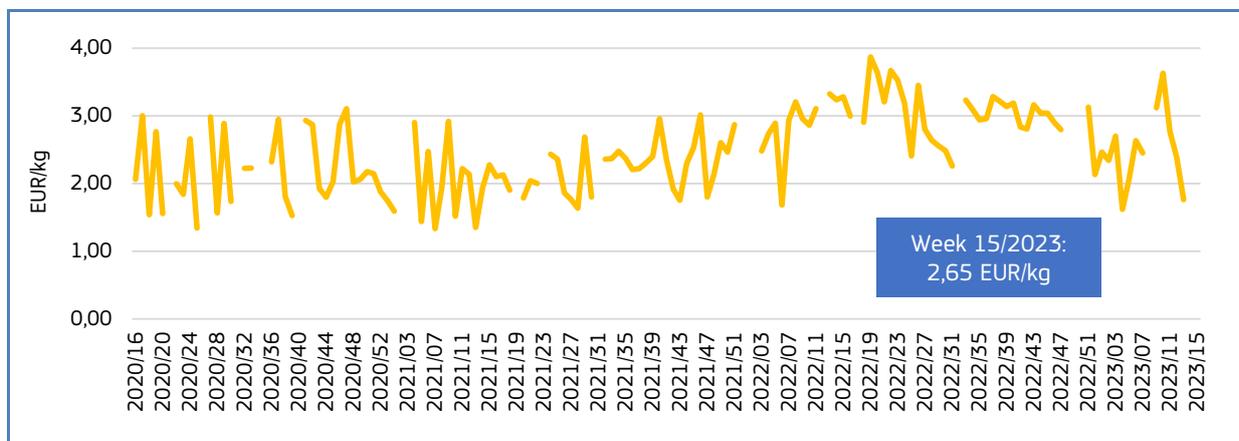


Figure 39. **IMPORT PRICE OF FROZEN FILLETS OF CAPE HAKE FROM NAMIBIA, 2020 - 2023**

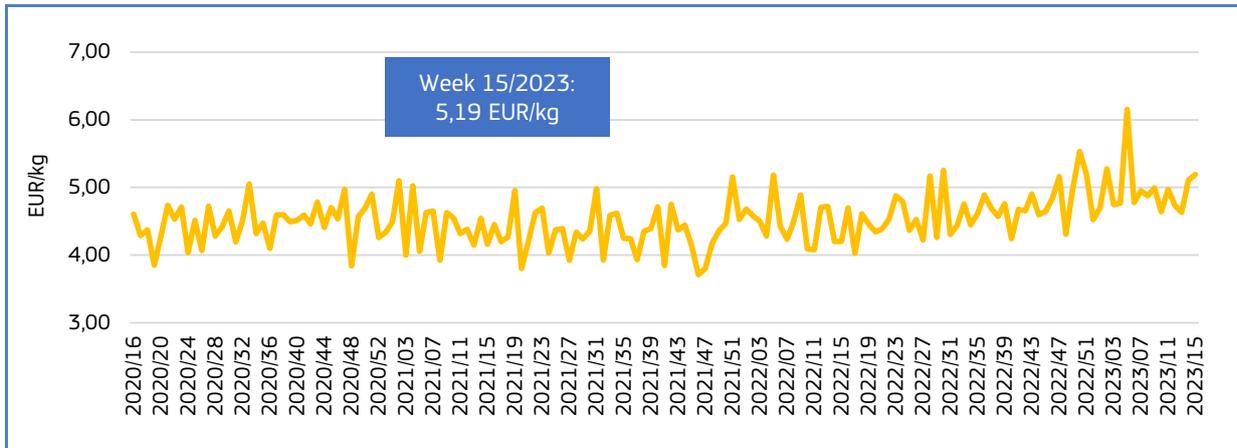
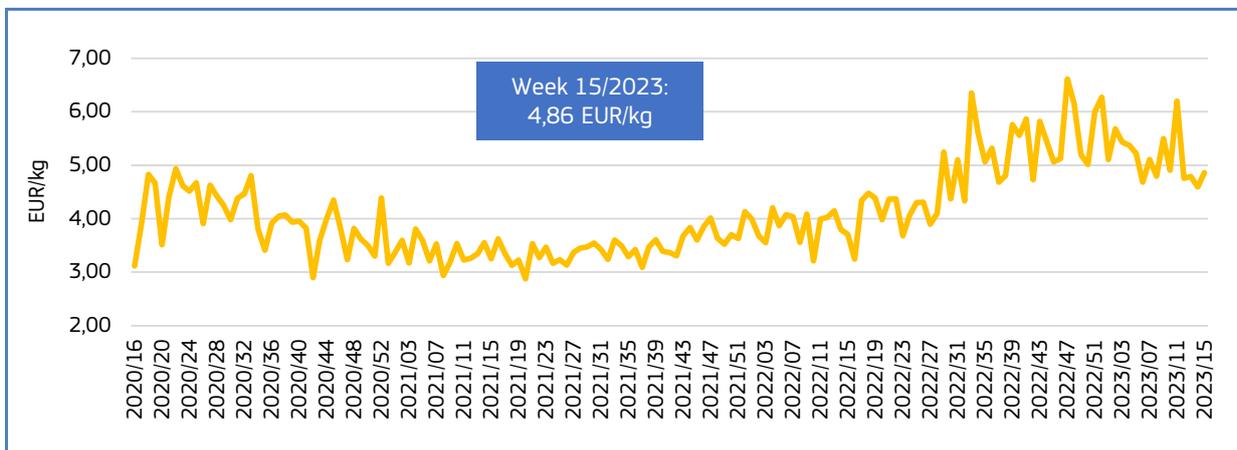


Figure 40. **IMPORT PRICE OF FROZEN FILLETS OF BLUE GRENADEER FROM NEW ZEALAND, 2020 - 2023**



Since the beginning of the year, price of frozen **yellowfin tuna** from **Seychelles** has been increasing, fluctuating between 1,62 to 3,63 EUR/kg. At the same time, volume fluctuated greatly from 0,064 to 317 tonnes.

Price of frozen fillets of **Cape hake** from **Namibia** showed an increasing trend between week 01/2023 and 15/2023. Price ranged from 4,63 to 6,15 EUR/kg while weekly supply fluctuated greatly from 56 to 1.850 tonnes.

In 2023, price of frozen fillets of **blue grenadier** from **New Zealand** showed a downward trend. Price ranged from 4,59 to 6,20 EUR/kg and supply fluctuated greatly from 40 to 419 tonnes.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

Data analysed in the section “Consumption” are extracted from EUMOFA, as collected from Europanel²⁵.

In March 2023 compared with March 2022, household consumption of fresh fisheries and aquaculture products decreased in Denmark, Germany, Hungary and Portugal in both volume and value, while in Ireland and Sweden an increase was observed in both parameters. In France and Spain values only increased, while consumed volumes remained the same.

Hake (49% of volume and 68% of value) and saithe (22% of volume and 38% of value) were the main species responsible for the increase in Ireland, while in Sweden these were mainly herring (249% of volume and 231% of value) and other salmonids (70% of volume and 116% of value). The highest decrease was detected in Denmark due to a lower consumption of cod (65% of volume and 64% of value), mackerel (62% of volume and 48% of value) and other halibut species (64% of volume and 59% of value).

Table 22. **MARCH OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)**

Country	Per capita consumption 2020* (live weight equivalent, LWE) kg/capita/year	March 2021		March 2022		February 2023		March 2023		Change from March 2022 to March 2023	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	35,17	1.380	25,33	1.042	18,31	630	12,06	635	12,91	-39%	-29%
France	32,56	20.934	254,70	15.708	207,35	14.102	195,80	15.710	214,84	0%	4%
Germany	12,81	9.670	143,32	6.005	98,46	5.426	89,96	5.201	93,90	-13%	-5%
Hungary	6,50	511	2,84	267	2,06	262	2,11	245	2,00	-8%	-3%
Ireland	21,22	1.488	22,32	1.204	18,64	1.008	16,45	1.343	21,71	12%	16%
Italy	29,99	30.638	333,08	27.793	317,56	18.920	230,79	23.471	294,88	-16%	-7%
Netherlands	20,70	3.860	67,70	2.837	50,61	2.306	46,18	2.612	53,66	-8%	6%
Poland	13,33	4.731	31,49	4.186	29,46	3.495	28,03	4.005	33,98	-4%	15%
Portugal	57,67	7.097	48,21	5.071	37,96	4.439	34,68	4.686	35,72	-8%	-6%
Spain	44,21	55.606	474,56	43.517	388,34	38.326	372,73	43.501	415,03	0%	7%
Sweden	23,99	1.179	14,78	457	6,65	362	5,90	483	8,10	6%	22%

*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/20178/521182/EFM2022_EN.pdf

Over the past three years, the average household consumption of fresh fisheries and aquaculture products in March has been above the annual average in both volume and value in Germany, Ireland, Italy, the Netherlands, Poland and Spain. In Hungary, Portugal and Sweden both volume and value were below the annual average.

The most recent weekly consumption data (up to **week 22 of 2023**) are available on the EUMOFA website and can be accessed [here](#).

²⁵ Last update: 23.05.2023.

3.2. Fresh trout²⁶

Habitat: Rainbow trout is a species cultured in many countries and is often hatched and stocked into rivers and lakes, especially to attract recreational fishers²⁷. Sea trout is a migratory fish with a life history and spawning behaviour similar to that of Atlantic salmon. Sea trout prefers cold, well-oxygenated waters and their tolerance limits are lower than those of rainbow trout²⁸.

Catch area: Sea trout inhabits both Europe and Asia: it is present at the shores of the Atlantic, in the North, White and Baltic Sea basins. It is also found in Iceland and the northernmost rivers of Great Britain and Scandinavia. The species has been widely introduced, though several countries reported adverse ecological impact after its introduction²⁹. Most rainbow trout consumed in the EU is from aquaculture production³⁰.

Production method: Mostly farmed, but also caught.

Aquaculture production areas: most of the EU MS, but mainly France, Italy, and Denmark³¹.

Main consumers in the EU: Germany, France, Italy, Spain, Poland and Finland.

Presentation: Whole (200-300 g), fillets³².

Preservation: Fresh, frozen, smoked.

Means of preparation: Baked, fried.



3.2.1. Overview of household consumption in Denmark, Germany, France, the Netherlands and Poland

The per capita apparent consumption of fish and seafood products in Denmark and France is above the EU average, while it is below average in Germany, the Netherlands and Poland. In 2020, Denmark registered the third highest consumption within the EU with 35,17 kg, followed by France with 32,56 kg. Consumption in Germany was 12,81 kg, 45% lower than the EU average of 23,28 kg. The per capita apparent consumption of fish and seafood products in the Netherlands was 20,70 kg, while in Poland it was 36% lower, 13,33 kg. See more on EU per capita consumption in Table 22.

In 2020, trout was among the top 15 most consumed fishery and aquaculture products in the EU with 0,49 kg/capita consumption. This was a 3% increase compared to 2019. 98,39% of consumption came from aquaculture, while 1,63% was caught wild. Between 2011 and 2020 the EU managed to maintain a good level of self-sufficiency for trout, but in 2020 the level was one of the lowest with a fall to 86% due to increased supply from abroad (mainly from Norway and Türkiye). With a volume of 4.590 tonnes trout was also the third most produced commodity of organic seafood production in the EU in 2020, after mussels (41.936 tonnes) and salmon (12.870 tonnes).

We have covered **trout** in previous *Monthly Highlights*:

First Sales: Denmark 9/2020, 5/2019; Estonia 9/2020; France 9/2022, 5/2019; Lithuania 9/2022; Poland 9/2020, 5/2019; Portugal 9/2022.

Consumption: Belgium 8/2016; Denmark 8/2016; Estonia 10/2015, 4/2015, Aug/Sep 2013; Finland 10/2015, 4/2015, Aug/Sep 2013; France 8/2019, 8/2016, 10/2015, 4/2015, Aug/Sep 2013; Germany 8/2016; Italy 10/2015, 4/2015; the Netherlands 8/2016; Poland 8/2019, Sweden Aug/Sep 2013; the UK 8/2019, 8/2016, 4/2015.

Extra-EU Imports: Norway 1/2023, 9/2020, 5/2019; Türkiye 9/2022, 9/2021, 8/2019, 11/2018.

Topic of the month: Farmed trout in the EU 6/2014.

²⁶ Two types of trout that can usually be found on the European market: rainbow trout (*Oncorhynchus mykiss*) and sea trout (*Salmo trutta*).

²⁷ <https://www.fishbase.se/summary/oncorhynchus-mykiss.html>

²⁸ <https://www.fishbase.se/summary/Salmo-trutta.html>

²⁹ <https://www.fishbase.se/summary/Salmo-trutta.html>

³⁰ https://www.eumofa.eu/documents/20178/474612/PTAT+Portion+trout+in+PL+DE+IT_EN.pdf

³¹ https://www.eumofa.eu/documents/20178/474612/PTAT+Portion+trout+in+PL+DE+IT_EN.pdf

³² <https://www.eumofa.eu/documents/20178/247624/MH+8+2019+EN.pdf>

Figure 41. **PRICES OF FRESH TROUT PURCHASED BY DANISH, GERMAN, FRENCH, DUTCH AND POLISH HOUSEHOLDS**

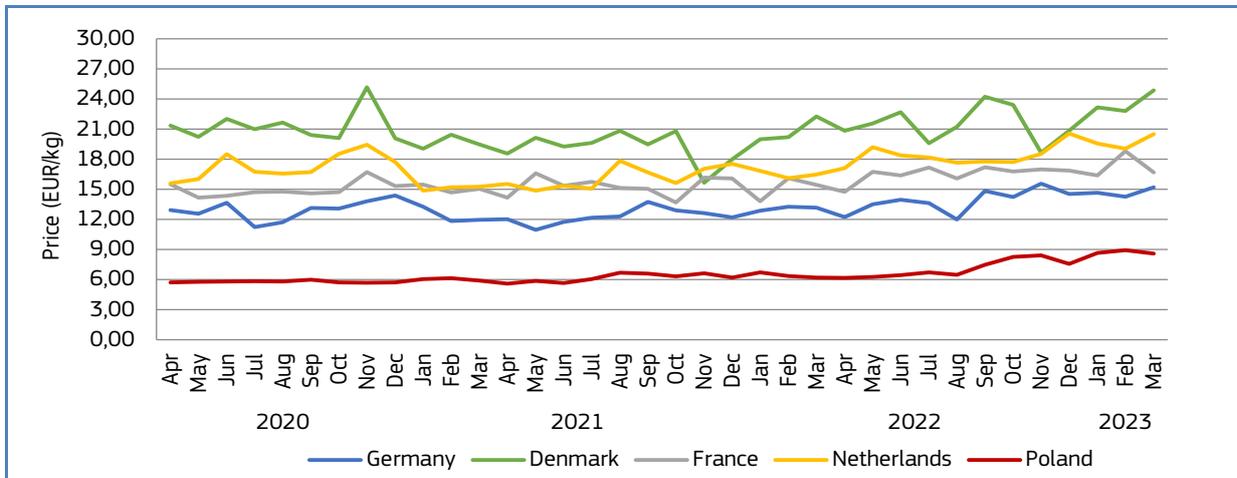
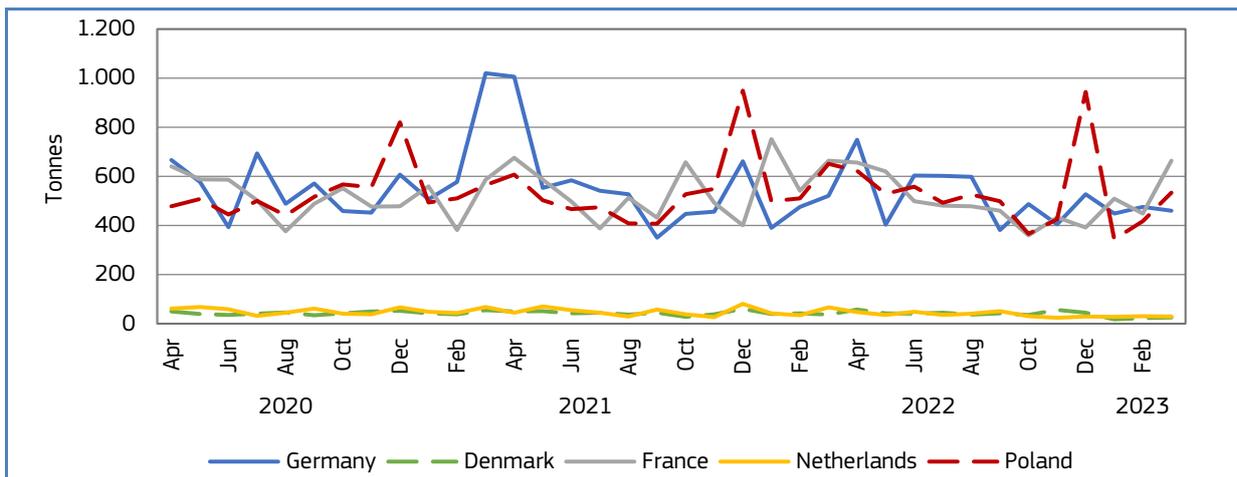


Figure 42. **HOUSEHOLD PURCHASES OF FRESH TROUT IN DENMARK, GERMANY, FRANCE, THE NETHERLANDS AND POLAND**



3.2.2. Household consumption trends in Denmark

Long-term trend (April 2020 to March 2023): Varying slightly in volume and price.

Yearly average price: 21,06 EUR/kg (2020), 19,27 EUR/kg (2021), 21,29 EUR/kg (2022).

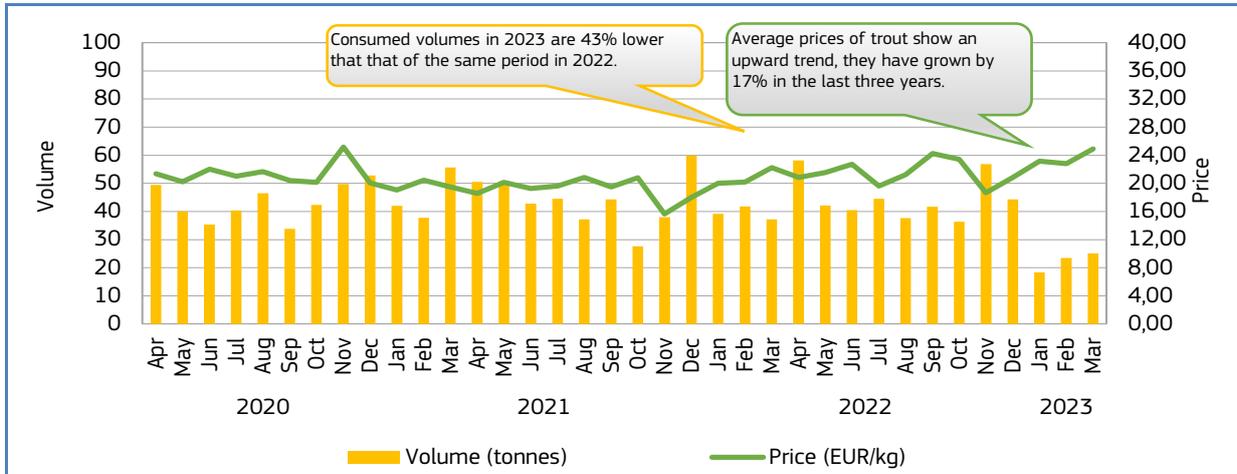
Yearly consumption: 498 tonnes (2020), 531 tonnes (2021), 520 tonnes (2022).

Short-term trend (January to March 2023): Upward trend in volume with fluctuating prices.

Price: 23,62 EUR/kg.

Consumption: 67 tonnes.

Figure 43. **RETAIL PRICE AND VOLUME OF FRESH TROUT PURCHASED BY HOUSEHOLDS IN DENMARK APRIL 2020 – MARCH 2023**



3.2.3. Household consumption trends in Germany

Long-term trend (April 2020 to March 2023): Upward trend in price and downward trend in volume.

Yearly average price: 12,87 EUR/kg (2020), 12,31 EUR/kg (2021), 13,65 EUR/kg (2022).

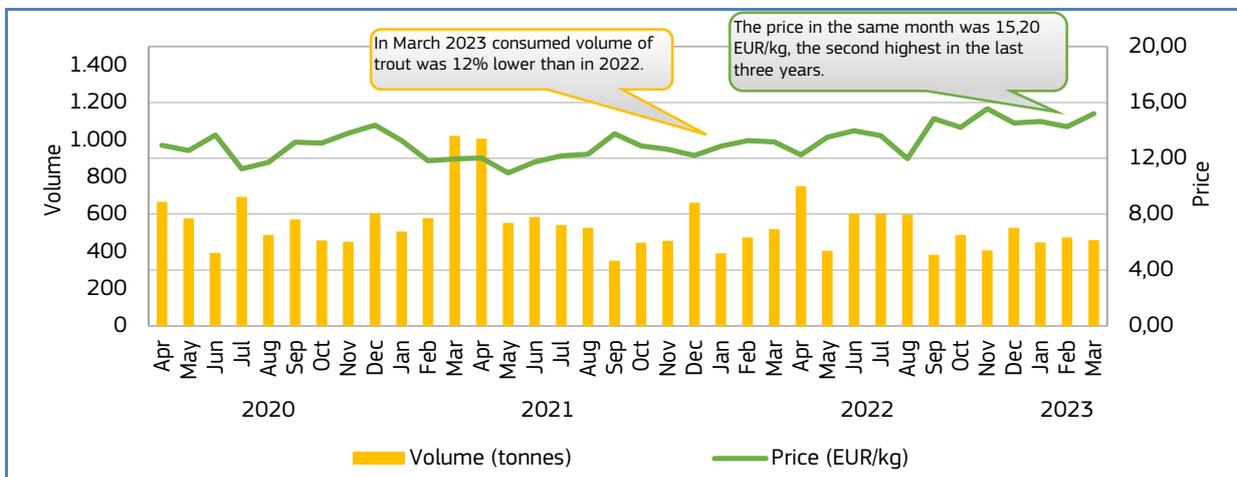
Yearly consumption: 6.241 tonnes (2020), 7.235 tonnes (2021), 6.146 tonnes (2022).

Short-term trend (January to March 2023): Fluctuating prices and volumes.

Price: 14,70 EUR/kg.

Consumption: 1.385 tonnes.

Figure 44. **RETAIL PRICE AND VOLUME OF FRESH TROUT PURCHASED BY HOUSEHOLDS IN GERMANY APRIL 2020 – MARCH 2023**



3.2.4. Household consumption trends in France

Long-term trend (April 2020 to March 2023): Upward trend in price and varying volumes.

Yearly average price: 14,87 EUR/kg (2020), 15,26 EUR/kg (2021), 16,19 EUR/kg (2022).

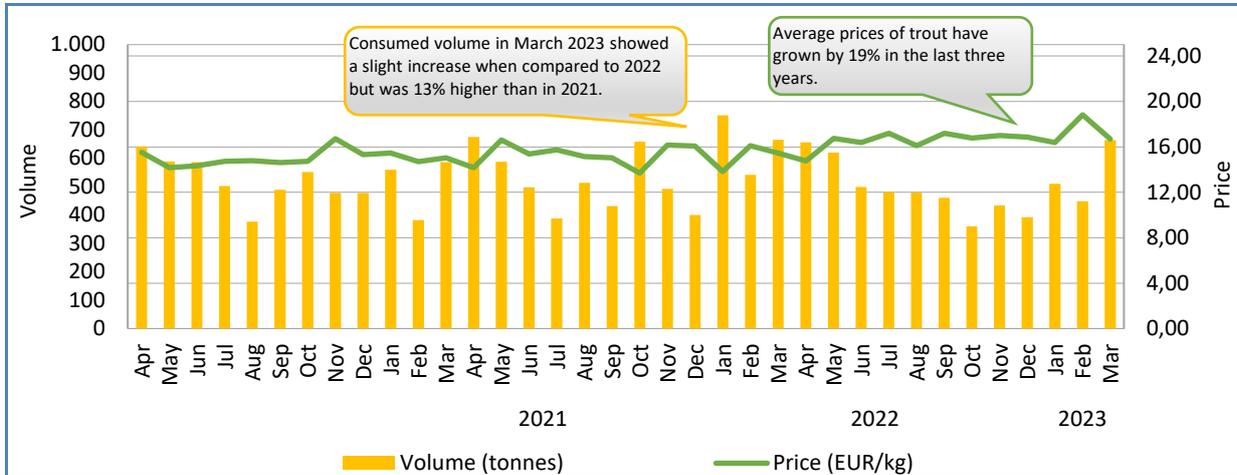
Yearly consumption: 6.228 tonnes (2020), 6.170 tonnes (2021), 6.337 tonnes (2022).

Short-term trend (January to March 2023): Fluctuating volumes and prices.

Price: 17,29 EUR/kg.

Consumption: 1.622 tonnes.

Figure 45. **RETAIL PRICE AND VOLUME OF FRESH TROUT PURCHASED BY HOUSEHOLDS IN FRANCE APRIL 2020 – MARCH 2023**



3.2.5. Household consumption trends in the Netherlands

Long-term trend (April 2020 to March 2023): Upward trend in price and downward trend in volume.

Yearly average price: 16,91 EUR/kg (2020), 15,91 EUR/kg (2021), 17,88 EUR/kg (2022).

Yearly consumption: 629 tonnes (2020), 609 tonnes (2021), 488 tonnes (2022).

Short-term trend (January to March 2023): Slightly fluctuating volumes and prices.

Price: 19,71 EUR/kg.

Consumption: 87 tonnes.

Figure 46. **RETAIL PRICE AND VOLUME OF FRESH TROUT PURCHASED BY HOUSEHOLDS IN THE NETHERLANDS APRIL 2020 – MARCH 2023**



3.2.6. Household consumption trends in Poland

Long-term trend (April 2020 to March 2023): Upward trend in both price and volume.

Yearly average price: 5,82 EUR/kg (2020), 6,13 EUR/kg (2021), 6,91 EUR/kg (2022).

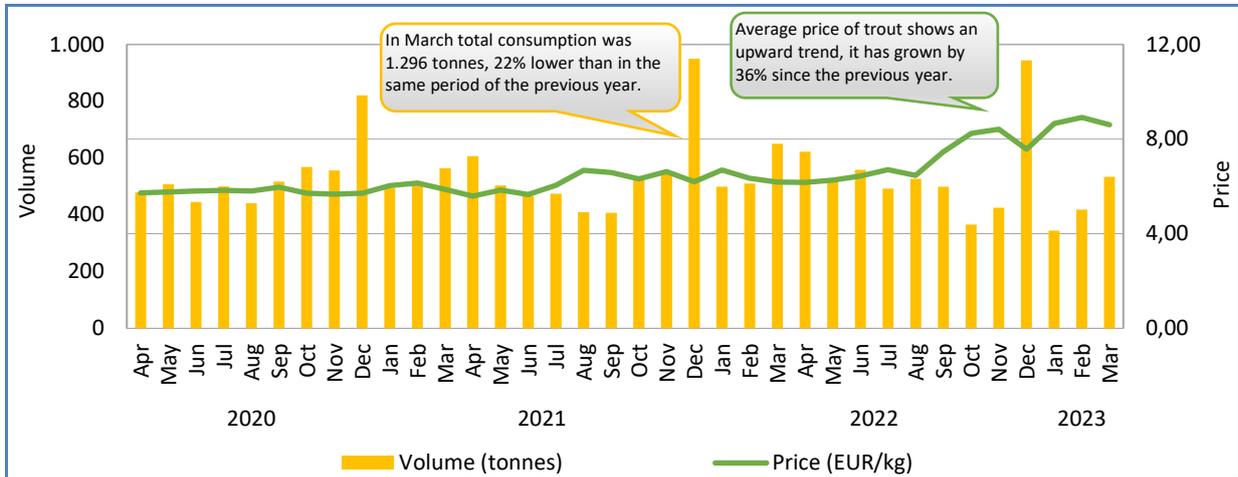
Yearly consumption: 6.242 tonnes (2020), 6.462 tonnes (2021), 6.622 tonnes (2022).

Short-term trend (January to March 2023): Upward trend in volume with a relatively stable price.

Price: 8,73 EUR/kg.

Consumption: 1.296 tonnes.

Figure 47. **RETAIL PRICE AND VOLUME OF FRESH TROUT PURCHASED BY HOUSEHOLDS IN POLAND APRIL 2020 – MARCH 2023**



4. Case study: Fisheries and aquaculture in Japan

Japan is an archipelago of 6,852 islands situated in a volcanic region known as the Pacific Ring of Fire³³. This area is characterised by a continuous sequence of underwater trenches, volcanic arcs and moving tectonic plates, accounting for over 75% of the world's active volcanoes and 90% of its earthquakes. The country's main islands are Hokkaido, Honshu, Shikoku and Kyushu, with Honshu being the largest.

Tokyo, the national capital is situated in east-central Honshu and is one of the world's most populous cities, with a population of 32,5 million people³³. Despite its land area being slightly larger than Germany and smaller than California, Japan ranks as the world's tenth most populous country, with a population of 127,3 million.



Source: CIA, the world factbook.

Having experienced significant growth in the latter half of the 20th century following the devastation of World War Two, Japan represents the world's third-largest economy³⁴. It holds a prominent position within the international community, serving as a major contributor of aid and a significant source of global capital and credit.

Japan relies heavily on the sea for its food supply, boasting one of the world's largest fish catches derived from offshore fisheries³⁵. The convergence of cold and warm ocean currents near Japan creates a thriving marine ecosystem. Whales, dolphins and an array of fish including salmon, sardines, tuna and cod populate Japanese waters. Crustaceans and molluscs such as crabs, shrimp, clams and oysters contribute to coastal resources. Trout, salmon and crayfish thrive in rivers and lakes. Carp, known as koi, are both commercially bred and appreciated for their beauty. This abundance of seafood sustains Japan's culinary traditions, economy and cultural practices.

4.1. Fisheries and aquaculture in Japan

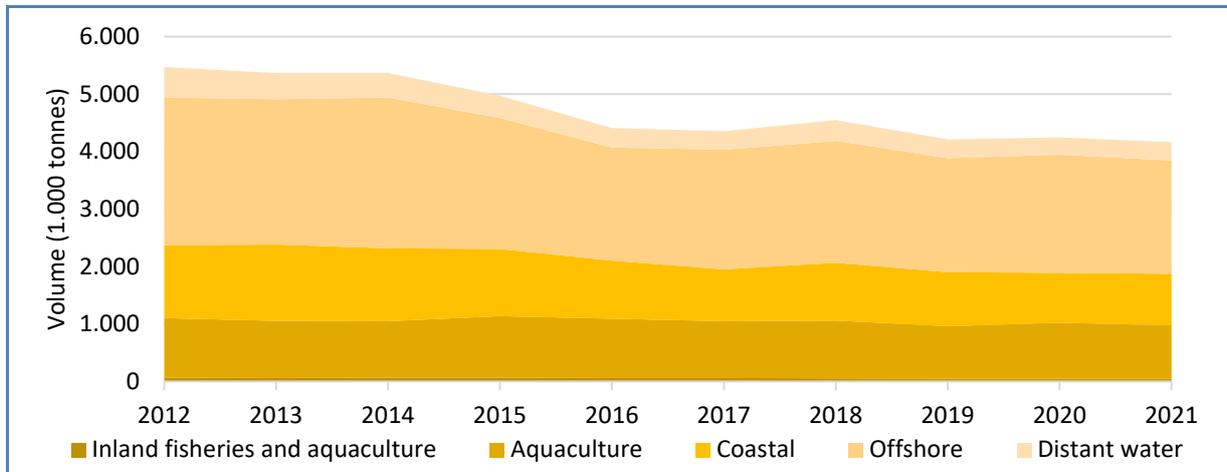
Despite its international prominence, Japan's fishing sector faces challenges. Overfishing and pollution have depleted local fisheries, particularly in the Inland Sea³⁵. The fishing workforce has declined, and an aging population further affects the industry³⁵. Consequently, domestic production has been declining for years, with imports surpassing exports.

³³ Global Sherpa, (2023). Japan – country profile, facts, news and original articles. <http://globalsherpa.org/japan/>

³⁴ BBC, (2023). Japan country profile. <https://www.bbc.com/news/world-asia-pacific-14918801>

³⁵ Jansen, M. B., et al., (2023). Japan. <https://www.britannica.com/place/Japan>

Figure 48. **CHANGES IN JAPANESE FISHERIES AND AQUACULTURE PRODUCTION VOLUME OVER THE PAST DECADE**



Source: FAO. Category shares for coastal, offshore and distant water fisheries were based on shares found in the annual reports, "Fisheries of Japan", from the Ministry of Agriculture, Forestry and Fisheries of Japan. Category shares for 2021 were based on the past three-year average.

Over the past decade, fisheries and aquaculture production in Japan has declined. In 2021, total production had decreased by 15% compared to 2012, mostly attributed to reduced fishing effort by the Japanese fishing fleet (82%) and lower production of marine aquaculture species (16%)³⁶. In 2021, the distant water fishing fleet reduced its fishing effort by 40% (215,000 tonnes) compared to 2012, while the coastal and offshore fishing fleets had reduced their effort by 29% (366,000 tonnes) and 23% (598,000 tonnes), respectively.

As for species, the decrease in volume was related to reduced catches of Pacific saury (-91%), skipjack tuna (-57%), Japanese flying squid (-81%) and Japanese anchovy (-52%)³⁶. Observing trends for these species over the past decade reveals that catches have generally been declining for all species, but Japanese anchovy and skipjack tuna were among the top ten captured species in 2021. For aquaculture, reduced production volume was mainly attributed to lower production of laver (nori, -29%), followed by Japanese amberjack (-17%) and yesso scallop (-11%). However, the production volume of these aquaculture species remained high in 2021, all being among the top five farmed species.

Fisheries production

Japan's Fisheries Act³⁷, established in 1949, provides a basic structure for Japan's fishery policy³⁸. In December 2020, an amendment to the Fisheries Act came into effect with the following three major points: introduction of Total Allowable Catch (TAC) regulations to major types of fisheries, revision of the priority order for fishing rights, and more flexibility amongst the members of Sea-area Fisheries Adjustment Committee (SFAC)³⁹ (abolishment of election system for members of SFAC).

Japanese fisheries can be divided into three main types: distant water fisheries, offshore fisheries and coastal fisheries⁴⁰. The three fishery types differ in terms of resource management and fishing techniques used. Distant water and offshore fisheries are characterised by volumes, while coastal fisheries target high valued species with ready market demand. In 2021, the value of the coastal fisheries contributed the most to the overall value of Japan's catches⁴¹.

In 2021, fisheries production in Japan amounted to 3,152,433 tonnes³⁶. Compared to 2020, this was a decrease of 3%, mainly related to decreased captures of skipjack tuna (25%) and albacore (49%), followed by Japanese anchovy (19%) and Japanese flying squid (35%).

³⁶ FAO statistics.

³⁷ FAOLEX, (2021). Japan Fisheries Act. <https://www.fao.org/faolex/results/details/en/c/LEX-FAOC001710>

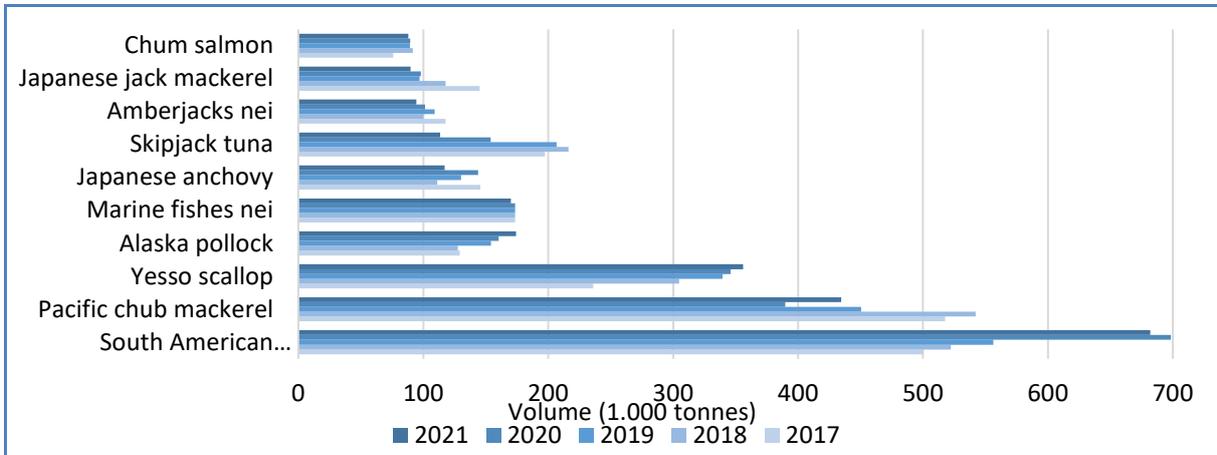
³⁸ Godo, Y., (2020). Amendment to the Fisheries Act in Japan. <https://ap.ffa.org.tw/article/2646>

³⁹ The Sea-area Fisheries Adjustment Committee (SFAC) is a Japanese government organization that manages fisheries. It coordinates fishing efforts, sets catch limits, and implements measures to ensure sustainable management and equitable distribution of fishing resources among different fishing communities and regional authorities.

⁴⁰ Schmidt, C., (2003). Fisheries and Japan: A case of multiple roles? <https://www.oecd.org/japan/2507622.pdf>

⁴¹ FAO statistics, Ministry of Agriculture, Forestry and Fisheries of Japan.

Figure 49. TOP TEN LANDED SPECIES IN JAPAN BY VOLUME



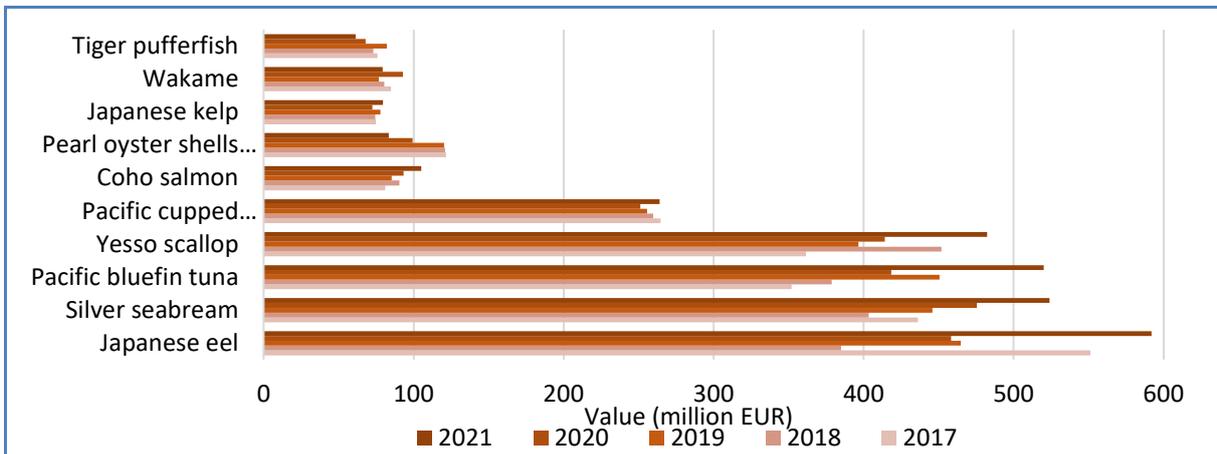
Source: FAO.

Aquaculture production

Aquaculture has a very long history in Japan, dating back to the 16th century when laver (nori) was first cultured⁴². Today, marine aquaculture is a major food production industry in Japan, with about 30 species currently cultured. The main types of marine aquaculture production are hanging culture, cage culture and seabed sowing cultivation in semi-inland sea areas.

In 2021, Japanese aquaculture production amounted to 959,680 tonnes at a value of EUR 5,2 million³⁶. Compared to 2020 this corresponded to a 4% decrease in volume and a 3% decrease in value. The decrease in value was mainly related to lower production of laver (nori), with a 16% reduction in volume and an 18% reduction in value, and of Japanese amberjack (-3%), with a 3% reduction in volume and a 6% reduction in value.

Figure 50. TOP TEN AQUACULTURE SPECIES IN JAPAN BY VALUE



Source: FAO.

⁴² Takeda, I. *The measures for sustainable marine aquaculture in Japan*. <https://www.fra.affrc.go.jp/bulletin/bull/bull29/15.pdf>

4.2. International trade

Japan is a full member of the World Trade Organization (WTO) and has actively engaged in various trade agreements and partnerships⁴³. Japan is also part of multiple Free Trade Agreements (FTAs) and Economic Partnership Agreements (EPAs) with numerous countries and regions⁴⁴. These include Singapore, Mexico, Malaysia, Chile, Thailand, Indonesia, Brunei, ASEAN, the Philippines, Switzerland, Vietnam, India, Peru, Australia, Mongolia, TPP12⁴⁵ (signed), TPP11⁴⁶, the European Union (EU), the United States (US), the United Kingdom (UK) and the Regional Comprehensive Economic Partnership (RCEP).

In 2022, Japan emerged as the third-largest importer of FAPs products globally. The United States and China hold the top two positions⁴⁷. According to the Ministry of Agriculture, Forestry and Fisheries (MAFF), FAPs accounted for 16% of Japan's overall imports in the agricultural, forestry and fisheries sector, by volume, in 2021⁴⁸. In 2022, Japan had a trade deficit for FAPs due to high domestic demand, with an import value of EUR 14,2 billion and an export value of EUR 2,6 billion⁴⁹.

Export

In 2022, Japan exported 637.004 tonnes of FAPs at a value of EUR 2,6 billion, which was a 3% increase in volume and a 22% increase in value compared to 2021⁴⁹. Scallop (30%) and other marine fish⁵⁰ (23%) made up 53% of the total value of exported FAPs, while miscellaneous small pelagics⁵¹ (21%), scallop (21%) and mackerel (20%), followed by other marine fish (13%), constituted most of the volume.

Scallop, mackerel and miscellaneous small pelagics were mainly exported frozen whole, and made up 84%, 98% and 100% of exports, respectively. Exports of other marine fish mainly comprised frozen whole unidentified⁵² fish (49%), prepared/preserved other cuts of unidentified fish (18%) and fresh whole unidentified fish (16%). However, most of the value from other marine fish came from frozen fillets of unidentified fish (29%), fresh whole unidentified fish (25%) and prepared/preserved other cuts of unidentified fish (20%).

In the first three months of 2023, Japan's export volume and value of FAPs amounted to 107.131 tonnes at a value of EUR 548 million. Compared to the same period in 2022, this was a 19% decrease in volume but a 2% increase in value. Other marine fish (30%) and scallop (24%), followed by sea cucumber (7%), made up most of the value of exports.

In 2022, most Japanese exports went to China (25%), Thailand (21%) and Vietnam (14%), while exports to China (24%), the USA (15%), Hong Kong (14%) and Taiwan (9%) accounted for most of the value. This was also the case for the first three months of 2023. Of exported FAPs from Japan, 1% of the volume and 3,5% of the value went to the EU in 2022.

⁴³ World Trade Organization, (2023). *Japan and the WTO*. https://www.wto.org/english/thewto_e/countries_e/japan_e.htm

⁴⁴ Ministry of Foreign affairs of Japan, (2022). *Free Trade Agreement (FTA) / Economic Partnership Agreement (EPA) and related initiatives*. <https://www.mofa.go.jp/policy/economy/fta/>

⁴⁵ TPP -Trans-Pacific Partnership

⁴⁶ <https://www.twai.it/journal/tnote-79/>

⁴⁷ International Trade Administration, (2022). *Japan – country commercial guide*. <https://www.trade.gov/country-commercial-guides/japan-market-overview>

⁴⁸ United States Department of Agriculture, (2023). *Seafood market update*.

https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Seafood%20Market%20Update_Osaka%20ATO_Japan_JA2023-0020.pdf

⁴⁹ Trade Data Monitor.

⁵⁰ This was an aggregation of 16 HS items, namely 030199 (unidentified live fish), 030249, 030289 (unidentified fresh fish, excl. edible offal), 030359, 030389 (unidentified frozen fish, excl. edible offal), 030449, 030459, 030489, 030499 (fresh and frozen fillets and other cuts of unidentified fish) 030539, 030549, 030554, 030559, 030569 (unidentified fish (incl. fillets) dried, salted or in brine, or smoked, excl. edible offal), 160419 (unidentified fish whole or in pieces, but not minced, prepared or preserved), and 160420 (unidentified prepared or preserved fish).

⁵¹ This was an aggregation of 3 HS items, namely 030243 (fresh or chilled sardines, sardinella, brisling or sprats), 030353 (frozen sardines, sardinella, brisling or sprats) and 160413 (sardines, sardinella, brisling or sprats, whole or in pieces, but not minced, prepared or preserved).

⁵² Unidentified fish in the main commercial species "other marine fish" are marine species not included in other commodity groups (e.g., lumpfish, Norway pout, and sandeels). Other marine fish is part of commodity group 07 (other marine fish) which includes the species gilthead seabream, seabass, monk, sharks, ray, red mullet, gurnard, scabbardfish, cusk-eel, dogfish, pickerel, John Dory, smelt, ray's bream, weever, and marine species not included in other commodity groups. For more information, please consult the "Harmonisation" page of the EUMOPA website at the link <https://www.eumopa.eu/harmonisation>

Table 23. **TOTAL EXPORTS BY MAIN COMMERCIAL SPECIES FROM JAPAN (volume in 1.000 tonnes, value in million EUR)**

MCS	2019		2020		2021		2022		2023*	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Scallop	1	68	1	47	3	81	132	775	17	134
Other marine fish**	94	472	89	394	101	503	85	604	21	163
Sea cucumber	1	203	1	168	1	139	1	153	0,1	36
Mackerel	172	180	174	182	179	179	127	147	11	13
Other products	1	13	2	11	2	13	23	115	0,4	2
Miscellaneous small pelagics***	96	66	92	65	90	59	133	88	27	20
Caviar, livers and roes	2	39	2	36	2	54	2	76	1	21
Fish oil	23	41	0,03	43	0,03	24	27	63	4	11
Sea urchin	0,2	19	0,2	24	0,3	43	0,3	57	0,1	15
Other molluscs and aquatic invertebrates****	94	466	85	335	121	545	4	49	0,4	3
Other	132	492	119	445	118	475	102	465	26	128
Total	616	2.058	565	1.750	616	2.115	637	2.590	107	548

Source: EUMOFA elaboration of figures from Trade Data Monitor.

*Up to and including March. **In 2022, the MCS other marine fish was an aggregation of 16 HS items and most of the value came from frozen fillets of unidentified fish (29%), prepared or preserved unidentified fish (19%), and live unidentified fish (12%). ***In 2022, the MCS miscellaneous small pelagics was an aggregation of 3 HS items and most of the value came from frozen sardines, sardinella, brisling or sprats (96%). ****In 2022, the MCS other molluscs and aquatic invertebrates was an aggregation of 6 HS items and most of the value came from prepared or preserved unidentified molluscs (65%).

Import

In 2022, Japan imported 2.026.862 tonnes of FAPs at a value of EUR 14,2 billion, which was a 2% decrease in volume and a 17% increase in value compared to 2021⁴⁹. Miscellaneous shrimp⁵³ (15% of value, 11% of volume), other marine fish (15% of value, 23% of volume), salmon (12% of value, 10% of volume) and miscellaneous tuna⁵⁴ (9% of value, 6% of volume) made up most of the value and volume of imported FAPs.

Imports of miscellaneous shrimp were made up of frozen whole (67%) and prepared/preserved (32%) shrimp, while salmon imports mainly were made up of frozen whole salmon (62%) and frozen fillets (18%). Imports of miscellaneous tuna comprised prepared/preserved other cuts (55%) and frozen fillets (45%). Imports of other marine fish comprised mainly frozen other cuts of unidentified⁵⁵ fish (30%), frozen whole unidentified fish (23%) and prepared/preserved other cuts of unidentified fish (23%). However, most of the value from other marine fish came from prepared/preserved other cuts of unidentified fish (26%), frozen fillets of unidentified fish (25%) and frozen other cuts of unidentified fish (24%).

In the first three months of 2023, Japan's import volume and value of FAPs amounted to 532.592 tonnes at a value of EUR 3,2 billion. Compared to the same period in 2022, this was a 16% increase in volume and a 7% increase in value. Salmon (17%), other marine fish (13%), miscellaneous shrimp (12%) and miscellaneous tuna (9%) made up most of the value of imports.

⁵³ This was an aggregation of 5 HS items, namely 030617 (frozen unidentified shrimps and prawns), 030636 (fresh or chilled unidentified shrimps and prawns), 030695 (other unidentified shrimps and prawns), 160521 (prepared or preserved shrimps and prawns, not in airtight containers) and 160529 (other prepared or preserved shrimps and prawns).

⁵⁴ This was an aggregation of 2 HS items, namely 030487 (frozen fillets of tuna of the genus Thunnus, skipjack or stripe-bellied bonito) and 160414 (tunas, skipjack and bonito, whole or in pieces, but not minced, prepared or preserved).

⁵⁵ Unidentified fish in the main commercial species "other marine fish" are marine species not included in other commodity groups (e.g., lumpfish, Norway pout, and sandeels). Other marine fish is part of commodity group 07 (other marine fish) which includes the species gilthead seabream, seabass, monk, sharks, ray, red mullet, gurnard, scabbardfish, cusk-eel, dogfish, pickerel, John Dory, smelt, ray's bream, weever, and marine species not included in other commodity groups. For more information, please consult the "Harmonisation" page of the EUMOFA website at the link <https://www.eumofa.eu/harmonisation>

In 2022, most imports came from China (18%), the USA (11%), Chile (8%), Norway (8%) and Thailand (7%), while imports from China (18%), Chile (10%), the USA (9%), Russia (8%), Vietnam (8%) and Norway (7%) accounted for most of the value. Of imported FAPs to the EU, 2,4% of the volume and 3,6% of the value came from the EU in 2022.

Table 24. **TOTAL IMPORTS BY MAIN COMMERCIAL SPECIES TO JAPAN (volume in 1.000 tonnes, value in million EUR)**

MCS	2019		2020		2021		2022		2023*	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Miscellaneous shrimp**	212	1.921	202	1.739	211	1.811	215	2.142	40	369
Other marine fish***	472	2.057	420	1.756	432	1.716	469	2.125	96	430
Salmon	211	1.543	222	1.379	221	1.472	204	1.697	67	546
Miscellaneous tuna****	117	1.048	116	964	127	1.080	126	1.232	28	302
Other cephalopods*****	157	817	150	745	153	671	168	834	31	164
Caviar, livers and roes	70	559	65	528	64	744	66	829	6	93
Crab	36	723	27	515	28	630	30	701	6	102
Eel	22	675	23	435	28	495	26	671	6	250
Octopus	43	359	45	336	34	304	43	434	10	93
Trout	42	409	40	377	34	325	37	419	6	89
Other	1.326	4.078	745	2.999	731	2.856	644	3.065	237	775
Total	2.709	14.189	2.056	11.774	2.064	12.104	2.027	14.148	533	3.212

Source: EUMOFA elaboration of figures from Trade Data Monitor.

*Up to and including March. **In 2022, the MCS miscellaneous shrimp was an aggregation of 5 HS items and most of the value came from frozen unidentified shrimps and prawns (66%) and prepared and prepared shrimps and prawns (33%). ***In 2022, the MCS other marine fish was an aggregation of 16 HS items and most of the value came from frozen fillets of unidentified fish (25%), frozen other meat of unidentified fish (24%), and unidentified fish, whole or in pieces, but not minced, prepared or preserved (22%). ****In 2022, the MCS miscellaneous tuna was an aggregation of 2 HS items and most of the value came from frozen fillets of tuna from the genus *Thunnus*, skipjack or stripe-bellied bonito (70%). *****In 2022, the MCS other cephalopods was an aggregation of 3 HS items and most of the value came from frozen cuttlefish and squid (66%) and prepared or preserved cuttlefish and squid (32%).

4.3. Trade flows in the EU

The EU-Japan Economic Partnership Agreement entered into force on 1 February 2019. It brings significant benefits for agricultural exports from the EU⁵⁶. With respect to FAPs, the most significant result of the EU-Japan EPA is the complete elimination by both sides of all import tariffs and quotas on trade of FAPs. It prioritises trade and sustainable development while supporting small and medium-sized enterprises and upholding high standards of labour, safety, environment and consumer protection.

EU exports to Japan

In 2022, the EU exported 50.102 tonnes of FAPs at a value of EUR 488 million to Japan. Compared to 2020, this was an increase of 1% in volume and 35% in value. Export of FAPs to Japan accounted for 2,2% of the volume and 6,0% of the value of total extra-EU exports of FAPs in 2022.

In terms of volume, the most important species exported to Japan from the EU in 2022 were miscellaneous tuna (17%), mackerel (14%), bluefin tuna (13%) and Atlantic horse mackerel (8%). The most valuable species exported to Japan were miscellaneous tuna (40%) and bluefin tuna (20%). Miscellaneous tuna was mainly exported as frozen fillets from Malta (66%) and Spain (34%), while mackerel was mainly exported frozen whole from Ireland (99%). Exports of fresh whole bluefin tuna mainly exited the EU in Croatia (46%), while exports of frozen whole bluefin tuna mainly exited the EU in Malta (26%). Frozen whole Atlantic horse mackerel was exported from the Netherlands (60%) and Ireland (40%).

⁵⁶ European Commission, (2023). *EU-Japan economic partnership agreement*. <https://trade.ec.europa.eu/access-to-markets/en/content/eu-japan-economic-partnership-agreement>

Table 25. **TOTAL EXPORTS FROM EU MS TO JAPAN (volume in tonnes, value in 1.000 EUR)**

Country	2019		2020		2021		2022		2023*	
	Volume	Value								
Ireland	12.377	19.189	8.139	11.107	9.681	17.896	10.383	19.184	3.275	6.200
Malta	10.925	138.268	9.032	109.003	8.491	124.084	9.934	208.546	1.169	26.034
Spain	7.091	69.146	8.322	86.135	6.597	74.659	7.602	92.205	2.290	22.004
Netherlands	7.031	16.199	8.871	16.753	7.121	13.805	4.421	9.867	1.356	2.261
Denmark	2.713	25.748	3.627	30.170	4.701	38.637	3.819	39.979	806	8.928
France	4.251	21.373	2.305	15.486	3.059	19.293	3.602	23.641	624	4.754
Croatia	2.759	30.751	3.116	33.123	3.439	30.129	3.013	39.658	2.652	45.436
Germany	2.025	12.995	3.207	15.726	1.444	8.567	2.531	16.590	94	766
Poland	906	4.533	1.050	6.304	1.038	5.492	1.395	6.621	313	1.814
Belgium	444	2.152	717	2.875	1.026	4.521	1.027	5.347	233	1.170
Other	5.010	44.546	2.411	20.251	2.897	22.955	2.374	25.963	551	4.465
Total	55.534	384.900	50.796	346.934	49.494	360.039	50.102	487.602	13.362	123.832

Source: EUMOFA elaboration of figures from Eurostat-Comext. *Up to and including March.

EU imports from Japan

In 2022, the EU imported 7.883 tonnes of FAPs at a value of EUR 110 million from Japan. Compared to 2021 this was an increase of 31% in volume and 55% in value. Import of FAPs from Japan accounted for 0,1% of the volume and 0,3% of the value of total extra-EU imports of FAPs in 2022.

In terms of volume, the most important species imported from Japan to the EU in 2022 were scallop (27%), other products⁵⁷ (18%) and other sharks⁵⁸ (13%). The most valuable species imported from Japan were scallop (50%), followed by other non-food use⁵⁹ (12%) and miscellaneous tuna (10%).

Frozen whole scallop was mainly imported through the Netherlands (83%), while soups and broths were predominantly imported through the Netherlands (37%), Germany (19%), France (16%) and Belgium (8%). Imports of frozen whole unidentified⁶⁰ sharks entered the EU through Spain (100%), while imports of frozen fillets of miscellaneous tuna mainly entered the EU through Spain (46%) and the Netherlands (34%). Live ornamental freshwater fish were mainly imported through the Netherlands (74%).

⁵⁷ The category "other products" only contained one HS item, namely 210410 (soups, broths and preparations thereof).

⁵⁸ The category "other sharks" only contained one HS item, namely 030381 (frozen dogfish and unidentified sharks).

⁵⁹ The category "other non-food use" only contained one HS item, namely 030111 (live ornamental freshwater fish).

⁶⁰ Unidentified sharks in the main commercial species "other sharks" are dogfish and shark species not included in other commodity groups (e.g., porbeagle and blue shark). Other sharks is part of commodity group 07 (other marine fish) which includes the species gilthead seabream, seabass, monk, sharks, ray, red mullet, gurnard, scabbardfish, cusk-eel, dogfish, pickerel, John Dory, smelt, ray's bream, weever, and marine species not included in other commodity groups. For more information, please consult the "Harmonisation" page of the EUMOFA website at the link <https://www.eumofa.eu/harmonisation>

Table 26. **TOTAL IMPORTS BY MCS FROM JAPAN (volume in tonnes, value in 1.000 EUR).**

Country	2019		2020		2021		2022		2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Netherlands	2.599	35.201	2.438	32.367	3.177	45.234	4.153	68.107	839	11.336
Spain	2.416	4.844	2.676	6.462	1.711	7.032	1.946	12.419	137	1.163
Germany	277	6.942	222	5.960	357	8.033	479	8.547	115	2.412
France	327	3.423	392	4.032	315	4.825	406	6.973	73	1.303
Denmark	43	753	35	678	93	1.457	285	5.082	119	2.584
Belgium	235	3.270	151	2.543	123	2.128	203	3.621	72	912
Italy	89	775	35	378	28	517	149	2.874	58	1.131
Portugal	40	403	13	107	37	208	109	857	45	464
Greece	54	829	48	851	54	943	55	982	17	292
Sweden	56	367	56	458	92	393	52	337	23	128
Other	576	6.805	102	1.040	40	511	46	486	43	126
Total	6.712	63.613	6.167	54.877	6.026	71.281	7.883	110.286	1.541	21.853

Source: EUMOFA elaboration of figures from Eurostat-Comext. *Up to and including March.

4.4. Consumption

Consumption of FAPs in Japan is declining, whilst global consumption and trade are on the increase. Domestic consumption of FAPs amounted to about 7,24 million tonnes, with a self-sufficiency rate of 56%, while per-capita consumption of edible FAPs was 23,8 kg. The per capita consumption of fish or seafood in the EU in 2019 was around 24 kg (live weight), which is slightly higher than Japanese per capita consumption.⁶¹ Factors influencing consumption include changing preferences for seafood types, such as a shift from squid and shrimp to salmon, tuna, and yellowtail, and the impact of COVID-19 on eating-out habits⁶². There is a growing emphasis on food safety and sustainability, with eco-label programmes such as the Marine Stewardship Council (MSC), Aquaculture Stewardship Council (ASC), and the domestic Marine Eco-Label (MEL) gaining importance⁶³.

⁶¹ https://oceans-and-fisheries.ec.europa.eu/facts-and-figures/facts-and-figures-common-fisheries-policy/consumption_en#:~:text=Fisheries%20and%20aquaculture%20products%20are,the%20rest%20of%20the%20world.

⁶² Japan Fisheries Agency. *Japanese seafood exports*. <https://www.jfa.maff.go.jp/j/kakou/pamp/pdf/etotal.pdf>

⁶³ Loew, C., (2021). Japan's fisheries white paper reviews 2020, sets 2021 policy priorities. <https://www.seafoodsource.com/news/supply-trade/japan-s-fisheries-white-paper-reviews-2020-sets-2021-policy-priorities>

5. Case study: European anchovy in the EU

Anchovies are the most exploited fish in the history of world fisheries, especially due to the huge catches of Peruvian anchovy (almost 6 million tonnes caught in 2021). European anchovy is the anchovy species which is the most caught and consumed in the EU. In 2021, more than 86% of the world production of European anchovy came from the Mediterranean and Black Seas⁶⁴. In 2021, EU-27 catches of European anchovies reached 104.147 tonnes, Spain and Italy being the main landing countries. Extra-EU exports go mainly to Morocco and Albania for further processing and re-import into the EU market.

5.1. Biology resource and exploitation

Biology



Source: Scandinavian Fishing Yearbook

European anchovy (*Engraulis encrasicolus*) is a member of the Engraulidae family. It is an oceanic and marine species, although in some areas it also enters lagoons, estuaries and lakes, especially when spawning.

Its geographic distribution is the Eastern Atlantic: Bergen, Norway to the Thames estuary, and South Africa, as well as around the Mediterranean, the Black and the Azov

Seas, with stray individuals in the Suez Canal and the Gulf of Suez. There have also been reports of European anchovy in Estonia⁶⁵. This species lives and moves in large shoals and can tolerate salinity thresholds ranging from 5 to 41 parts per thousand (ppt).

Shoals can be found in different areas and at different depths depending on the season. Anchovy tends to move further north and into surface waters during the summer, while retreating to lower depths during winter. The species feeds on planktonic organisms. The spawning period is from April to November, with peaks usually in the warmest months⁶⁶.

Resource, exploitation and management in the EU

European anchovy is a highly commercial species. In European waters it is mainly caught by purse seines, pelagic trawlers⁶⁷ or small-scale trawlers⁶⁸. The period of highest catches of European anchovy is from May to September. On average, over the years 2019 and 2020, 80% of catches were made with purse seines, 14% with pelagic trawls, 3% with trawls or demersal seines and 2% with gear using hooks⁶⁹.

It can be marketed fresh, dried, smoked, canned, salted or in brine and frozen. Anchovies can also be processed into oil or fishmeal for use in aquaculture feed. Since anchovies can be preserved by salting or storing in oil, they have been used for long-distance trade for many centuries.

European anchovy is managed by a total allowable catch (TAC), except for the stock in the Mediterranean Sea. Anchovy is subject to fisheries management measures, including fishery closures and total allowable catches (TACs) in the ICES Subarea 8 (Bay of Biscay)⁷⁰ and in Division 9.a (Atlantic Iberian waters)⁷¹. In the Mediterranean Sea, the anchovy fishery is managed through the General Fisheries Commission for the Mediterranean (GFCM), with regulations and recommendations binding on all members, including the EU (this includes various spatiotemporal and fishing effort measures such as maximum

⁶⁴ FAO

⁶⁵ *Engraulis encrasicolus*, European anchovy: fisheries, bait (fishbase.se)

⁶⁶ *Engraulis encrasicolus*, European anchovy: fisheries, bait (fishbase.se)

⁶⁷ STECF

⁶⁸ European Anchovy | British Sea Fishing

⁶⁹ STECF

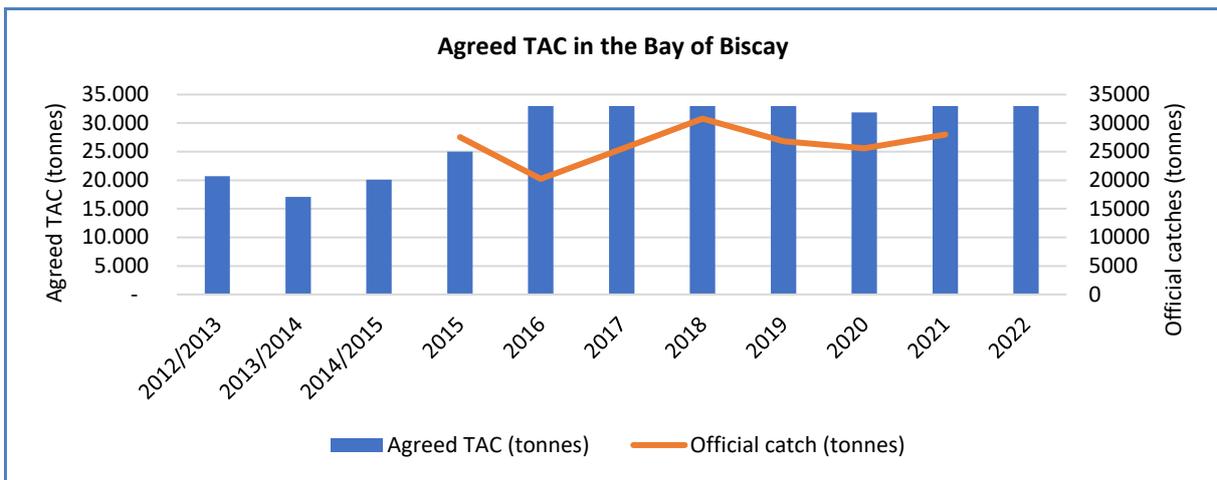
⁷⁰ Anchovy (*Engraulis encrasicolus*) in Subarea 8 (Bay of Biscay) (ICES)

⁷¹ Anchovy (*Engraulis encrasicolus*) in Division 9.a (Atlantic Iberian waters) (ICES)

number of fishing days, catch limits per vessel and fishery closures)⁷². Moreover, the European regulation⁷³ sets for this species a minimum conservation reference size (MCRS) which varies according to the fishing area⁷⁴. The MCRS can range between 9 and 12 cm. In the case of the Black Sea and the Mediterranean Sea, the MCRS must be ≥ 90 pieces/kg and ≥ 110 pieces/kg respectively.

The stock in the North-East Atlantic is considered to be in good condition, while the stock in the Aegean Sea is classified as overfished. Those in the North Sea and Mediterranean Sea are classified as degraded and overfished (except for the stock in the Gulf of Lion)⁷⁵. The European anchovy stock located in the North-East Atlantic was closed for fishing from 2005 to 2010 to protect the stock which had been severely depleted. There are also temporal or spatio-temporal closure periods depending on the fishing zones and the state of stocks.

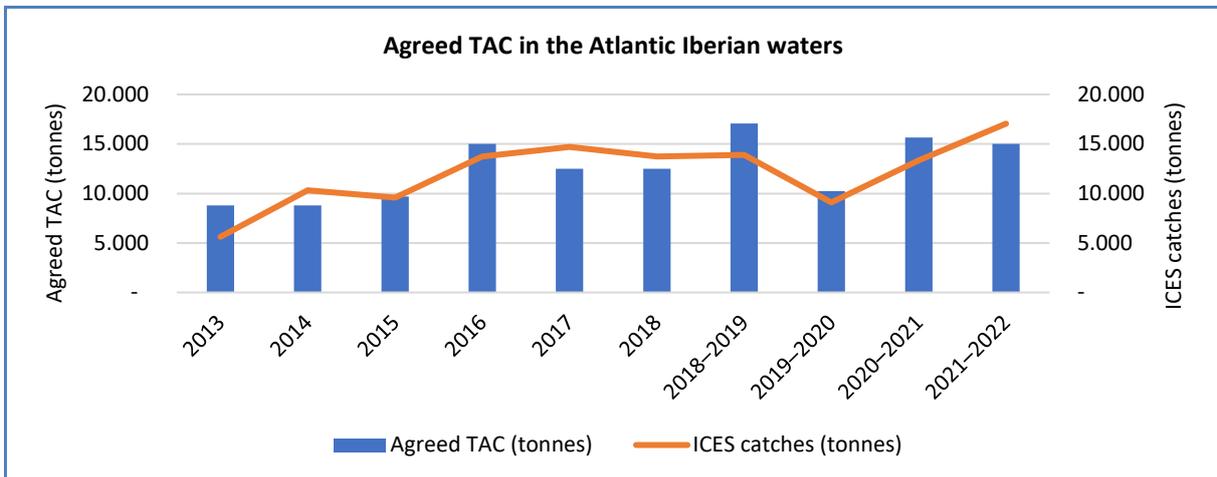
Figure 51. **TOTAL ALLOWABLE CATCH: EUROPEAN ANCHOVY, BAY OF BISCAY**



Source: ICES, 2022.

Notes: - From 2011 to 2014 the advice, TAC, and landings are valid from 1 July to 30 June the following year
 - In 2016, the initial TAC was set to 25,000 tonnes; in June 2016 it was raised to 33,000 tonnes.

Figure 52. **TOTAL ALLOWABLE CATCH: EUROPEAN ANCHOVY, ATLANTIC IBERIAN WATERS**



Source: ICES, 2022.

Notes: - Catch advice provided for the western and southern components from 1 July in the year y to 30 June in the year y+1.
 - For the year 2021-2022, catch is an estimate of the first two quarters of 2022 are provisional.

⁷² FishSource - European anchovy - Adriatic Sea

⁷³ As defined in art. 8 of Regulation (EU) 2015/812 of the European Parliament and of the Council of 20 May 2015, which amends article 47 of Regulation (EU) No 1379/2013, where minimum conservation reference sizes are established, they shall constitute minimum marketing sizes.

⁷⁴ [Engraulis engraulis \(europa.eu\)](http://engraulis.engraulis.europa.eu)

⁷⁵ [Anchois | Guide des espèces \(guidedesespecies.org\)](http://Anchois | Guide des espèces (guidedesespecies.org))

5.2. Production

Catches

In 2021 global production of European anchovy amounted to 495.073 tonnes. The leading producer by volume was Türkiye, accounting for 31% of the global catches, followed by the EU-27 (21%) and Georgia (15%). The main EU countries in terms of catch volumes were Spain (47%), Italy (23%) and to a lesser extent Croatia, Portugal and Greece, together accounting for 98% of total EU catches in 2021.

Between 2012 and 2021 global catches of European anchovy species were stable despite fluctuations. Nevertheless, Turkish production decreased by 8%, while Georgian catches soared (almost +600%).

Table 27. **TOTAL WORLD CATCHES OF EUROPEAN ANCHOVY (volume in tonnes)**

Country	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	% change 2021/2012
Türkiye	163.982	179.615	96.440	193.492	102.595	158.094	96.452	262.544	171.253	151.598	-8%
EU-27	105.248	90.569	102.782	128.165	115.423	128.382	135.279	114.663	80.408	105.047	0%
Georgia	11.007	14.500	18.000	21.500	25.921	99.293	90.043	89.813	83.025	75.284	+584%
Ghana	51.172	7.574	6.127	5.368	13.230	38.409	60.975	41.667	44.690	73.467	+44%
Morocco	50.331	35.065	17.768	24.963	26.881	17.682	22.930	19.622	50.078	48.166	-4%
Russian Federation	14.799	20.803	21.725	45.673	48.676	50.194	36.679	32.359	31.167	24.069	+63%
Egypt	2.903	3.604	3.641	3.242	2.657	3.448	4.570	4.491	4.962	4.718	+63%
Togo	5.181	8.553	6.597	8.983	11.297	10.691	10.588	10.607	4.648	3.814	-26%
Tunisia	1.233	535	1.140	3.110	2.300	3.813	5.553	2.645	2.515	2.595	+110%
Senegal	1.965	3.801	2.748	1.017	776	612	9.521	2.281	2.495	1.827	-7%
Algeria	2.265	990	2.192	3.013	1.660	3.519	3.304	10.128	4.804	1.204	-99%
Ukraine	29.885	35.371	389	1.290	2.246	2.034	773	767	1.136	356	-47%
Others	52.647	10.219	2.840	1.380	2.437	948	2.466	2.802	818	2.928	-94%
Total	492.618	411.199	282.390	441.196	356.100	517.119	479.133	594.388	481.999	495.073	0%

Source: FAO.

Landings in the EU

In 2020, landings of European anchovy species in the EU-27 amounted to 104.070 tonnes. The fact that the volume of European anchovy caught by the EU fleet is higher than the volume landed in the EU suggests that a share of EU catches could be landed in third countries, specifically in Morocco.

Since 2013, Spain has been the main landing EU Member State, accounting for 48% of the total EU landing volumes in 2021, followed by Italy (23%). Other main landing countries were Croatia (11%), Portugal (9%) and Greece (7%).

From 2012 to 2021, EU-27 landings of European anchovy remained relatively stable (+7%) despite strong fluctuations with peaks in 2015, 2017 and 2018. There was nevertheless a 54% increase in Spanish anchovy production which is likely to be related to the increase in TACs in the Bay of Biscay and in Iberian waters, whereas a 55% decrease in Italy and a 9% decrease in France were reported.

Table 28. **LANDINGS OF EUROPEAN ANCHOVY IN THE EU (volume in tonnes)**⁷⁶

COUNTRY	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Spain	26.701	36.112	42.722	49.922	46.192	50.774	59.502	47.776	48.607	49.582
Italy	42.800	29.664	31.842	37.511	37.969	39.039	36.331	31.068	23.736	23.725
Croatia	8.290	9.234	10.123	12.785	8.236	10.880	13.251	7.993	9.781	11.621
Portugal	796	391	818	2.546	6.937	9.059	8.311	9.126	5.484	9.638
Greece	9.506	8.752	9.847	13.515	11.562	13.033	13.208	15.278	11.276	7.322
Bulgaria	9	10	372	13	53	4	5	71	423	1.177
France	8.850	5.019	6.935	5.653	3.659	4.491	4.342	3.062	1.233	829
Others	471	495	149	5.095	367	137	60	58	3.060	177
Total	97.423	89.677	102.807	127.039	114.974	127.415	135.009	114.432	103.599	104.070

Source: Eurostat.

Processing

Anchovy can be consumed fresh or processed. Preserved in oil, salted or marinated are the main processed products⁷⁷. In Eurostat-Prodcom data, only prepared or preserved anchovies are listed⁷⁸. In 2021, EU production of prepared and preserved anchovies amounted to 25.484 tonnes, a 54% increase compared to ten years before. The main producers were Spain (56% of EU production), Italy (38%), Greece (3%), France (1%). Spain and Italy have recorded significant increases between 2012 and 2021, with production rising by 60% and 47% respectively. Nevertheless, Italy's production decreased by 36% between 2020 and 2021, while Spanish production increased by 30% over the same period. These trends could be related to the evolution of the supply (landings) in both countries. Over the same period (between 2012 and 2021), production was stable in Greece and increased in France (+25%).

Table 29. **EU PRODUCTION OF PREPARED OR PRESERVED ANCHOVIES (volume in tonnes)**

Country	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Spain	8.616	8.749	10.012	10.396	11.124	11.120	11.174	11.392	9.997	14.310
Italy	4.520	4.470	3.482	3.340	4.484	7.335	16.557	13.712	26.704	9.675
Greece	644	694	723	750	840	806	745	792	747	744
France	84	94	143	110	-	-	-	199	357	339
Croatia	-	49	700	329	24	33	12	4	142	294
Estonia	2	105	99	992	222	24	-	-	118	119
Portugal	-	-	-	6	15	16	-	-	3	3
Total	13.865	14.161	15.158	15.923	16.709	19.334	28.488	26.099	38.069	25.484

Source: Prodcom Eurostat

⁷⁶ Totals do not correspond exactly to actual sums because of roundings.⁷⁷ <https://www.eumofa.eu/documents/20178/111808/Price+structure+--+Anchovy+in+Italy.pdf>⁷⁸ 10202560 - Prepared or preserved anchovies, whole or in pieces (excluding minced products and prepared meals and dishes)

5.3. European anchovy: first sales in the EU

In 2022, the first sales of anchovy in reporting countries amounted to 9.645 tonnes at a value of almost EUR 19,5 million and an average price of 2,01 EUR/kg. Among the reporting countries, Spain accounted for most first-sale volumes (56%), followed by Italy (25%), Greece (13%) and Portugal (5%).

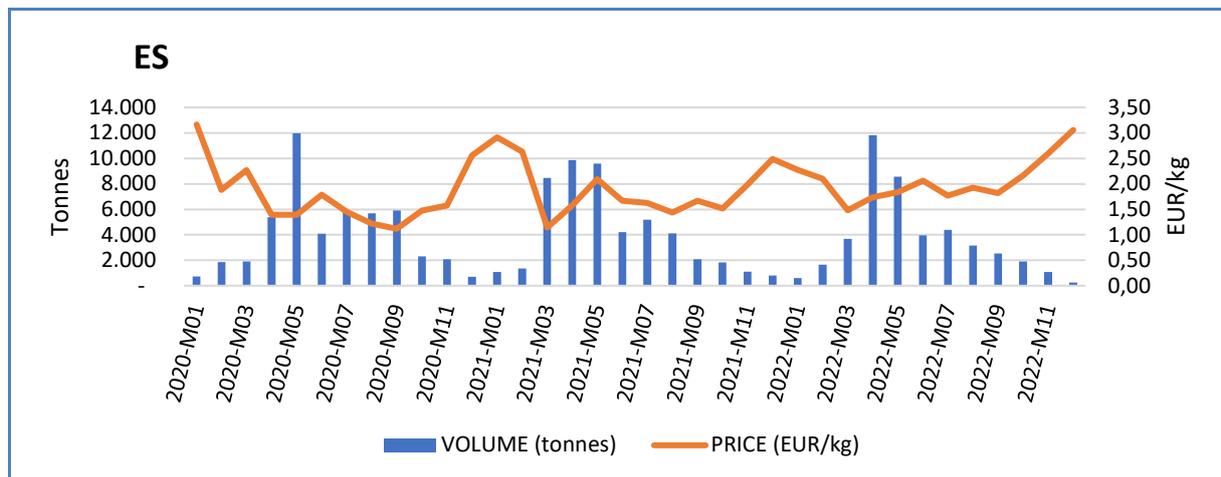
Between 2022 and 2021, first-sale volumes decreased by 12% in Spain, increased by 5% in Italy and 8% in Greece. But overall, first-sale values in volume terms across the European Union remained stable.

In all main reporting countries, first-sale data show strong seasonality, with the majority of first sales occurring between May and September, the peak fishing season being during the summer period. The variation in first sale prices always seems to be related to first sale volumes, with prices peaking each year (from November to February depending on the countries) when volumes are at their lowest levels, and low prices in summer and spring during the high-volume season.

Prices recorded in Spain between January 2020 and December 2022 (1,91 EUR/kg on average) were higher than prices recorded in Greece (1,67 EUR/kg) but lower than of Portugal (2,47 EUR/kg) and Italy (2,64 EUR/kg).

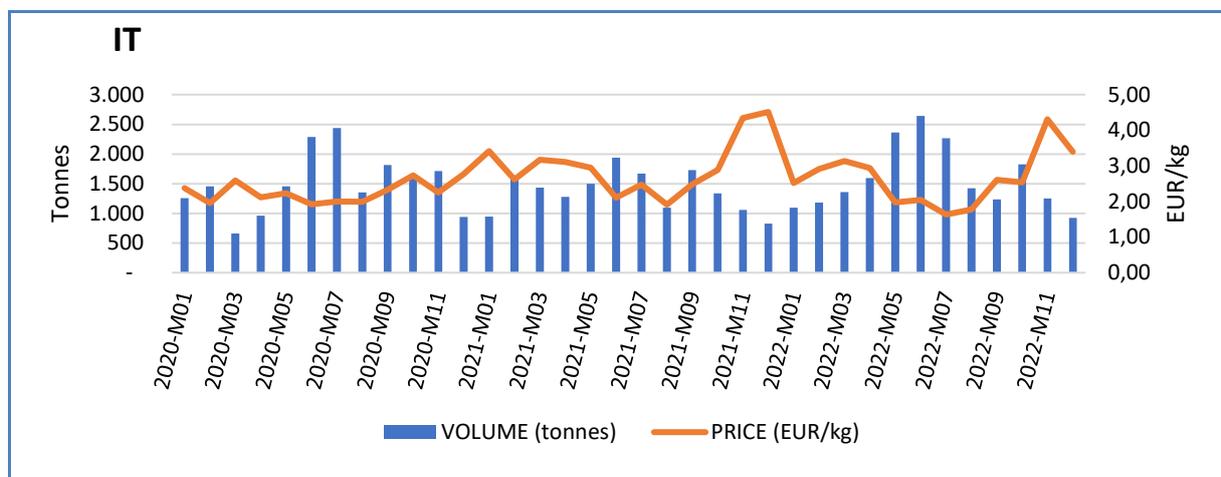
In 2022, the four most important places of sale for European anchovy in volume terms were in Spain with Santoña, Ondárroa, Laredo and Gijón. Porto Tolle, located in Italy is in fifth position. Places of sale are not available in Greek data.

Figure 53. **FIRST SALES: EUROPEAN ANCHOVY IN SPAIN**



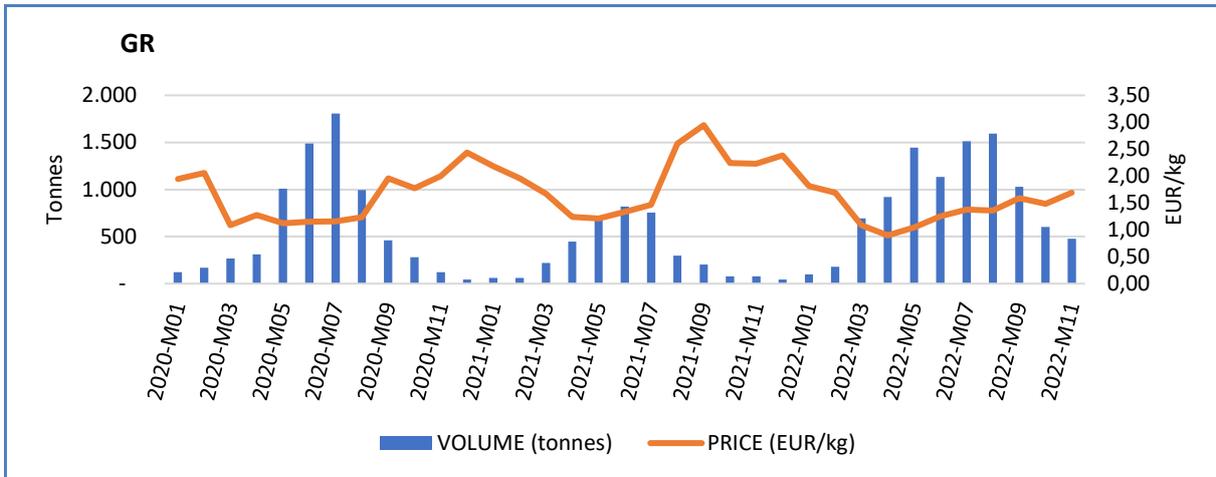
Source: EUMOFA.

Figure 54. **FIRST SALES: EUROPEAN ANCHOVY IN ITALY**



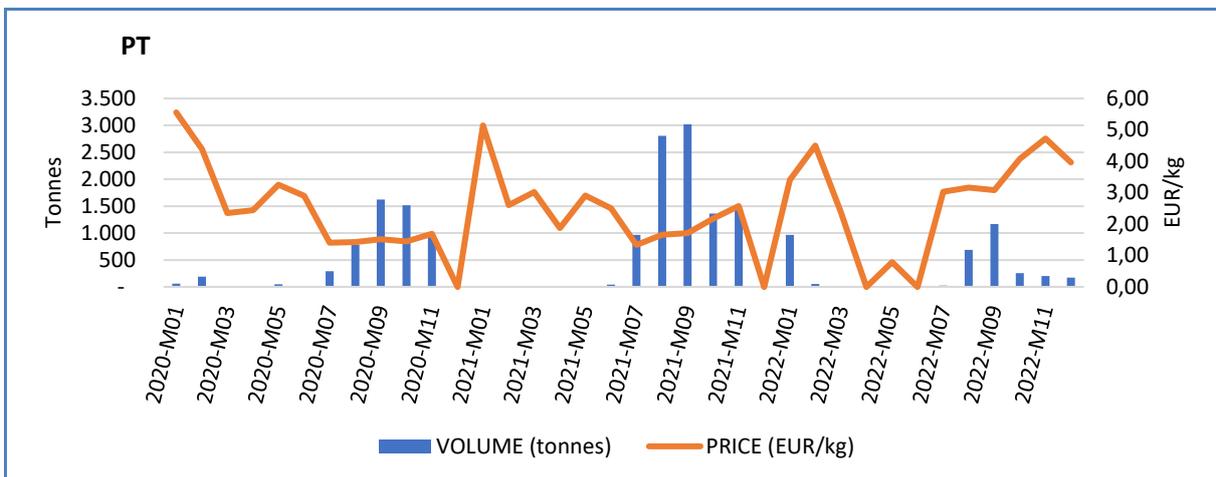
Source: EUMOFA.

Figure 55. **FIRST SALES: EUROPEAN ANCHOVY IN GREECE**



Source: EUMOFA.

Figure 56. **FIRST SALES: EUROPEAN ANCHOVY IN PORTUGAL**



Source: EUMOFA.

5.4. International trade

EU trade flows and supply

In the combined nomenclature (CN) ⁷⁹ used for registering EU import-export data, anchovy was specifically reported as fresh, prepared or preserved, salted or in brine, frozen and dried (even salted but not smoked).

In 2022, the EU-27 imported 24.956 tonnes of anchovy at a value of 186 million, mostly prepared or preserved (91% of the imports total value). The major provider of anchovy to the EU market was Morocco, accounting for 63% of the extra-EU import value, followed by Albania (14%). Spain received 42% of the anchovy extra-EU imports value. Spain, Italy and France together account for 93% of extra-EU import value.

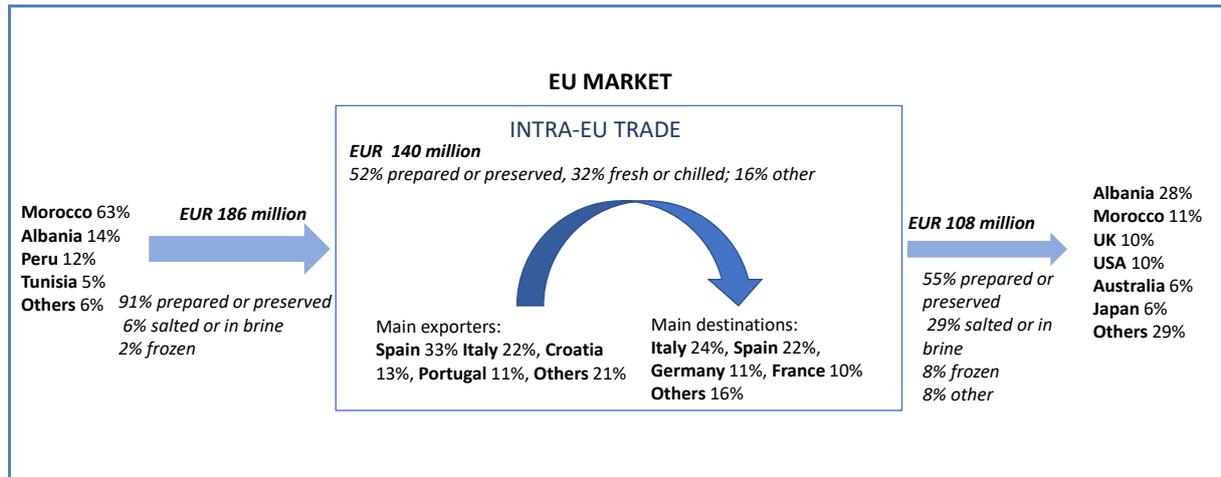
In the same year, EU exports to third countries amounted to 26.833 tonnes at a value of EUR 108 million. Prepared or preserved anchovies accounted for 55% of the total extra-EU export value whilst salted or in brine products accounted for 29% of the total export value. The main destination in value terms was Albania, accounting for 28% of the total extra-EU

⁷⁹ The Combined Nomenclature (CN) is the EU's eight-digit coding system, comprising the Harmonised System (HS) codes with further EU subdivisions. It serves the EU's common customs tariff and provides statistics for trade within the EU and between the EU and the rest of the world.

export value, followed by Morocco (11%). Most likely, most of these exports to Morocco and Albania are made in order to be processed (canning) and imported back into the EU.

In 2022, intra-EU exports amounted to 27.894 tonnes of European anchovy products at a value of EUR 140 million. The intra-EU trade was dominated by prepared or preserved anchovies, which accounted for 52% of the trade value, followed by fresh or chilled products (32%). The main exporting countries within the EU were Spain (33% of the intra-EU export value) and Italy (22%), followed by Croatia (13%) and Portugal (11%). Italy (24% of the total intra-EU export value), Spain (22%), Germany (11%) and France (10%) were the main destinations for the intra-EU exports.

Figure 57. **THE ANCHOVY EU-TRADE MARKET IN 2022, IN VALUE**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

5.5. Consumption

Although a significant share of EU landings is destined for further processing (canned in oil or salted), anchovy is also consumed fresh, especially fried or marinated in Mediterranean countries. In Italy, fresh anchovies are consumed all year round with a peak in spring and summer when the supply is the highest. According to Europanel data, household consumption of fresh anchovies in Italy reached 12.545 tonnes in 2022, a 20% decrease compared to 2021.

6. Global highlights

EU / Fishing authorization: On 10 May 2023, the European Commission launched a new [website](#) on EU Fishing Authorisations. Users can now search for data on fishing authorisations that have been granted during the last 10 years to EU vessels fishing outside EU waters and to non-EU vessels fishing in EU waters. This website boosts transparency in EU fisheries and digitalisation of EU administration by making relevant fisheries data available in real-time to the public. The shared information ensures that the operations of the EU's external fishing fleets are open and accessible to everyone. This website is an important step in implementing the EU Regulation on Sustainable Management of External Fishing Fleet (Regulation (EU) 2017/2403 of the European Parliament and of the Council of 12 December 2017) particularly on publicly accessible data⁸⁰.



EU / Biodiversity protection: The EU Mission **'Restore our Ocean and Waters by 2030'** officially launched a new 'lighthouse' in the Danube and Black Sea. It will bring together community and sectoral stakeholders in the region to find solutions to restore the health of the water system. Mission lighthouses are sites to pilot, demonstrate, develop, and deploy the Mission activities across EU seas and river basins. The main objectives of the EU Mission are to protect and restore biodiversity, cut pollution, and support a sustainable blue economy⁸¹.

GFCM / Aquaculture: Following the success of its first [training](#) for young women in aquaculture in the Mediterranean and the Black Sea, held in 2022 in Tunisia, the General Fisheries Commission for the Mediterranean (GFCM) of the Food and Agriculture Organization of the United Nations (FAO) is organising a second edition in Greece in June 2023. The training will consist of a series of theoretical sessions held by aquaculture experts from the region to build a foundation of best practices, highlight the importance of the involvement of women in the sector, share success stories, and showcase the GFCM approach for the sustainable development of aquaculture⁸².

EU / RFMO / Sustainability: The 27th annual meeting of the Indian Ocean Tuna Commission (IOTC), that took place from 8 to 12 May 2023 in Mauritius, delivered some important results for sustainable fisheries in the Indian Ocean and concluded in the adoption of 9 important conservation and management measures. Decisions include the adoption of a measure to ensure the sustainable management for the bigeye tuna, adoption of the long-standing proposal of the EU to improve the compliance process of the IOTC, adopted an important measure to protect seabirds, and cetaceans from adverse impacts of the tuna fisheries and number of other measures. For more information please [here](#)⁸³.

Ireland / Aquaculture: In many countries around the EU, small-town coastal communities are struggling to retain young people in the aquaculture sector. This is also the case on Ireland's west coast, where local oyster producers are looking for new and innovative ways to promote this culturally and historically significant industry with the younger generations and improve its public perceptions. Assisted by the EU-funded Aquaculture Remote Classroom (ARC), Ireland's Seafood Development Agency Bord (BIM) is organising mobile classroom tours in small towns around the country, delivering aquaculture education and awareness to primary schools. The ARC brings the classroom to the students in rural areas, completely free of charge to participating schools. The project focuses on strengthening the "social licence" of the aquaculture industry, improving public opinions on aquaculture, and getting public support for new aquaculture investments in local communities⁸⁴.

⁸⁰ https://oceans-and-fisheries.ec.europa.eu/news/eu-fishing-authorisations-website-launched-2023-05-10_en

⁸¹ https://oceans-and-fisheries.ec.europa.eu/news/eu-mission-restore-our-ocean-and-waters-launch-danube-black-sea-lighthouse-2023-05-03_en

⁸² <https://www.fao.org/gfcm/activities/aquaculture/consumers-and-market/marketing/trainingwomen/en/>

⁸³ https://oceans-and-fisheries.ec.europa.eu/news/fisheries-agreement-reached-sustainable-management-bigeye-tuna-indian-ocean-2023-05-16_en

⁸⁴ https://oceans-and-fisheries.ec.europa.eu/news/farming-future-aquaculture-remote-classroom-brings-aquaculture-awareness-streets-2023-05-17_en

7. Macroeconomic Context

7.1. Marine fuel

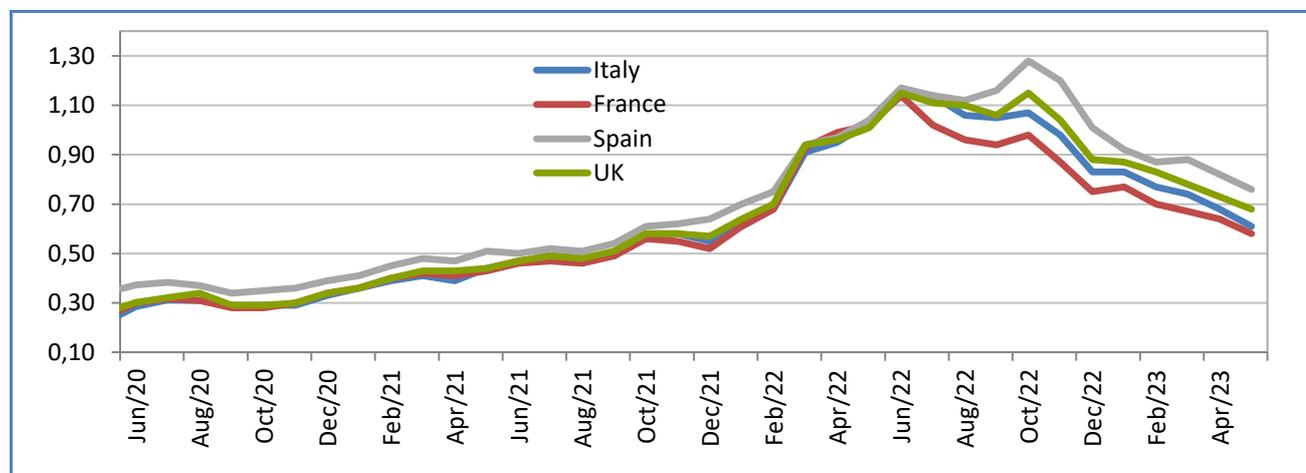
Average prices for marine fuel in **May 2023** ranged between 0,58 and 0,76 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices decreased by an average of about 8,4% compared with the previous month, and they also decreased by an average of 35,9% compared with the same month in 2022.

Table 30. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	April 2023	Change from Mar 2023	Change from Apr 2022
France <i>(ports of Lorient and Boulogne)</i>	0,58	-9%	-43%
Italy <i>(ports of Ancona and Livorno)</i>	0,61	-10%	-41%
Spain <i>(ports of A Coruña and Vigo)</i>	0,76	-7%	-27%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,68	-7%	-33%

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

Figure 58. **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 8,1% in April 2023, down from 8,3% in March 2023. A year earlier, the rate was 8,1%.

Inflation: lowest rates in April 2023, compared with March 2023.



Inflation: highest rates in April 2023, compared with March 2023.



Table 31. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

	Mar 2021	Mar 2022	Mar 2023	Mar 2023	Change from Mar 2023		Change from Mar 2022	
Food and non-alcoholic beverages	110,88	120,46	140,10	140,23	↑	0,1%	↑	16,4%
Fish and seafood	114,14	122,88	137,98	138,90	↑	0,7%	↑	13,0%

Source: Eurostat.

7.3. Exchange rates

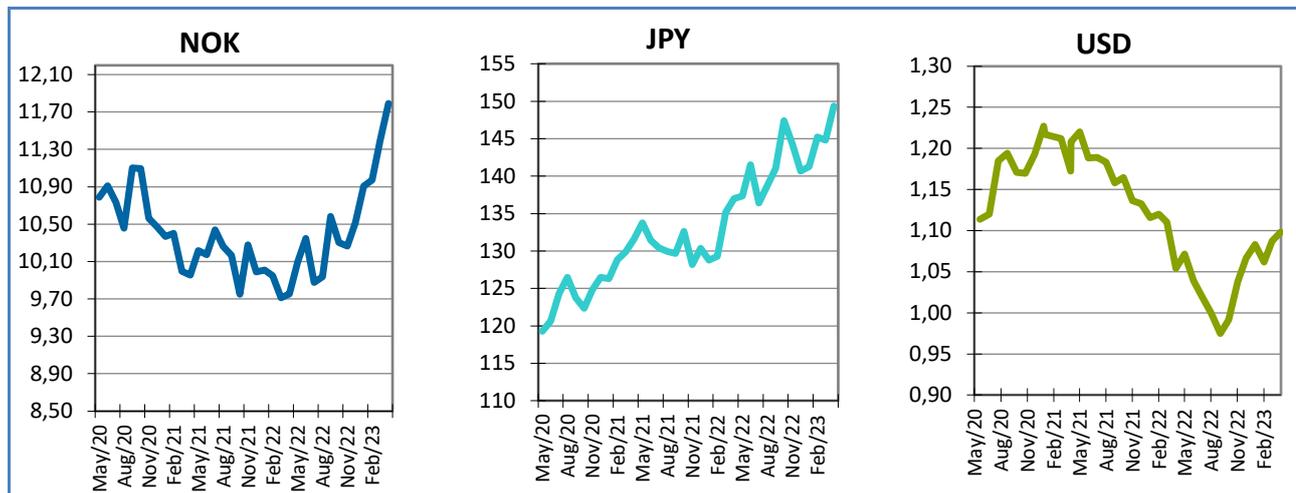
Table 32. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Apr 2021	Apr 2022	Mar 2023	Apr 2023
NOK	9,9533	9,7525	11,394	11,791
JPY	131,62	137,01	144,83	149,35
USD	1,2082	1,054	1,0875	1,0981

Source: European Central Bank.

In April 2023, the euro appreciated against the Norwegian krone (3,5%), the US dollar (1,0%), and the Japanese yen (3,1%), relative to the previous month. For the past six months, the euro has fluctuated around 1,0725 against the US dollar. Compared with April 2022, the euro has appreciated 9,0% against the Japanese yen, 20,9% against the Norwegian krone, and 4,2% against the US dollar.

Figure 59. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

Manuscript completed in June 2023

The European Commission is not liable for any consequence stemming from the reuse of this publication.

Luxembourg: Publications Office of the European Union, 2023

© European Union, 2023



The reuse policy of European Commission documents is implemented based on Commission Decision 2011/833/EU of 12 March 2011 on the reuse of Commission documents (OJ L 330, 14.12.2011, p. 39).

Except otherwise noted, the reuse of this document is authorised under a Creative Commons Attribution 4.0 International (CC-BY 4.0) licence (<https://creativecommons.org/licenses/by/4.0/>). This means that reuse is allowed provided appropriate credit is given and any changes are indicated.

For any use or reproduction of elements that are not owned by the European Union, permission may need to be sought directly from the respective rightsholders. The European Union does not own the copyright in relation to the following elements:

Images: Cover photo, pages 30, 50 © EUROFISH, page 19 © Les poissons Gervais, H., pages 15, 43 © Scandinavian Fishing Yearbook, page 35 © CIA, the world factbook.

PDF ISSN: 2314-9671 KL-AK-23-006-EN-N
ISBN: 978-92-76-98551-8 DOI: 10.2771/912742

FOR MORE INFORMATION AND COMMENTS:

Directorate-General for Maritime Affairs and Fisheries
B-1049 Brussels
E-mail: contact-us@eumofa.eu

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

First sales: EUR-Lex, DG Mare – European Commission, Fishbase, GFCM, Correio dos Açores, Bulletin of marine science, STECF, DFO Atlantic Fisheries, MarLin, British Sea Fishing.

Consumption: FishBase

Case studies: Global Sherpa, BBC, Britannica, FAO, FAOLEX, FFTC, OECD, Ministry of Agriculture, Forestry and Fisheries of Japan, FRA, WTO, Ministry of Foreign affairs of Japan, International Trade Administration, United States Department of Agriculture, Trade Data Monitor, European Commission, SeafoodSource, Japan Fisheries Agency, Fishbase, STECF, British Sea Fishing, ICES, FishSource, DG MARE, Ethic Ocean, Eurostat.

Global highlights: European Commission Oceans and Fisheries, FAO.

Macroeconomic context: EUROSTAT, Chamber of Commerce of Forlì-Ces ena, 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].

As a **market intelligence tool**, EUMOFA provides regular weekly prices, monthly market trends, and annual structural data along the supply chain.

The database is based on data provided and validated by Member States and European institutions. It is available in 24 languages.

The EUMOFA website is publicly available at the following address: www.eumofa.eu.

EUMOFA **Privacy Policy**



Publications Office
of the European Union