



Monthly Highlights

No. 7 / 2023

During January–April 2023, 12 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups.

In the EU Atlantic waters, two stocks of European pilchard are relevant to fisheries: the Northern stock and the Southern stock.

Over the 36-month observation period (May 2020 to April 2023), the weighted average first-sales price of European pilchard in Spain was 1,35 EUR/kg, 9% higher than in Portugal (1,23 EUR/kg), and 81% higher than in France (0,74 EUR/kg).

Over the past three years, Italy's household consumption of clams was more than five times higher than in Portugal. Italian consumers spent almost three times more for a kilogramme of fresh clam compared to consumers in Portugal.

In 2020 Hungary was the biggest producer of African catfish among EU countries, while common carp was the most produced fish in the country.

Between 2012 and 2021 catches and landings of pollack decreased strongly in the EU-27.

Denmark has established a new Real-Time Closure (RTC) in their waters of the Skagerrak. The closure applies from 24 May 2023 to 13 June 2023 23:59 hrs.



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1. First sales in Europe

During **January–April 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–April 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. Small pelagics were principally responsible for increases in Estonia, while in Germany increases were due to mackerel and Greenland halibut.

Decreases in value and volume: Bulgaria, France, Spain and Sweden recorded decreases in first-sales value and volume. Sweden stood out with the most significant drops in absolute terms, due to lower first sales of herring.

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

Country	January – April 2021		January – April 2022		January – April 2023		Change from January – April 2022	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Bulgaria	720	0,6	383	0,3	377	0,2	-2%	-34%
Cyprus	130	0,9	116	0,8	111	0,8	-4%	2%
Estonia	29.545	7,1	17.151	4,6	32.215	10,1	88%	118%
France	70.607	217,0	71.190	250,1	67.245	239,5	-6%	-4%
Germany	16.899	23,3	9.214	15,7	14.979	18,8	63%	20%
Italy	25.784	106,0	21.654	104,4	22.302	105,5	3%	1%
Latvia	20.811	4,3	16.485	3,5	19.747	5,1	20%	47%
Lithuania	1.286	0,6	640	0,4	132	0,4	-79%	12%
Netherlands	65.833	88,7	78.521	81,2	79.790	71,2	2%	-12%
Portugal	22.290	72,7	20.235	85,5	21.564	88,0	7%	3%
Spain	160.094	437,3	142.562	476,5	134.525	447,1	-6%	-6%
Sweden	72.787	28,0	51.677	26,6	20.304	17,0	-61%	-36%
Norway	250.405	229,8	233.851	307,8	262.727	253,2	12%	-18%
United Kingdom	119.169	176,2	106.101	201,0	126.048	212,4	19%	6%

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, flatfish, freshwater fish, groundfish, other marine fish, salmonids, small pelagics, tuna and tuna-like species.

² First sales data updated on 19.06.2023.

1.2. April 2023 compared to April 2022

Increases in value and volume: First sales increased in Bulgaria, Estonia, Latvia, the Netherlands and Portugal. The highest increase was observed in Estonia and the Netherlands. In Estonia herring and sprat were behind these increases, while in the Netherlands they were due to blue whiting and miscellaneous small pelagics.

Decreases in value and volume: First sales decreased in Cyprus, France, Italy, Lithuania, Spain, Sweden and Norway. Lithuania and Sweden presented the most significant drops. The sharp decreases in both countries were mainly due to falls in first sales of small pelagics.

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

Country	April 2021		April 2022		April 2023		Change from April 2022	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Bulgaria	540	0,3	285	0,1	294	0,131	3%	8%
Cyprus	38	0,3	34	0,2	32	0,2	-7%	-1%
Estonia	5.189	1,7	4.620	1,5	8.020	3,0	74%	99%
France	18.037	52,0	18.652	61,8	16.067	53,2	-14%	-14%
Germany	3.431	14,3	1.967	8,0	5.492	6,7	179%	-16%
Italy	6.534	28,5	6.263	32,3	5.722	28,8	-9%	-11%
Latvia	4.584	0,9	3.969	0,8	5.986	1,6	51%	94%
Lithuania	262	0,09	178	0,054	36	0,022	-80%	-60%
Netherlands	19.966	25,6	4.058	11,7	26.515	18,4	553%	57%
Portugal	8.140	21,1	5.752	21,4	6.029	22,0	5%	3%
Spain	52.330	133,0	50.349	158,5	39.315	125,4	-22%	-21%
Sweden	6.711	4,9	7.571	4,9	1.608	3,3	-79%	-33%
Norway	250.405	229,8	2.691.326	22,4	2.408.777	18,3	-10%	-18%
United Kingdom	28.856	40,2	17.764	39,4	21.327	38,7	20%	-2%

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 28 of 2023) are available via the EUMOFA website and can be accessed [here](#).

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

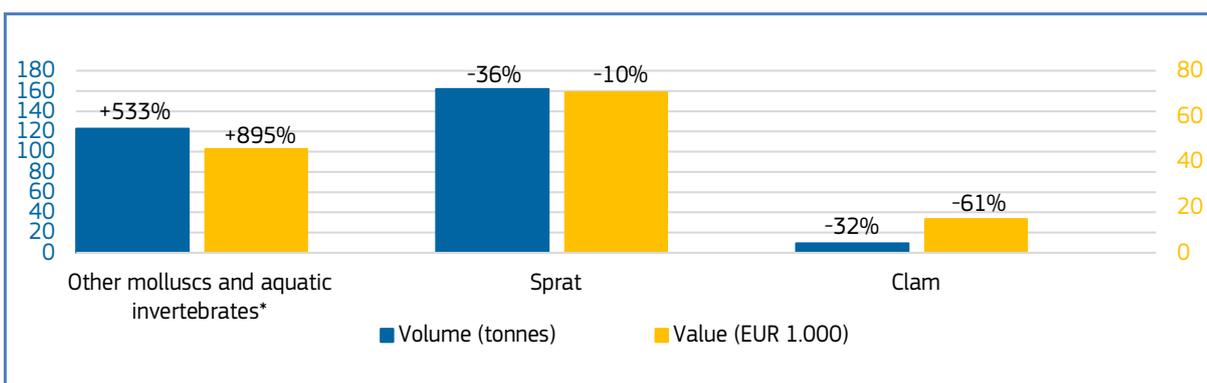
1.3. First sales in selected countries

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-Apr 2023 vs Jan-Apr 2022	EUR 0,2 million, -34%	377 tonnes, -2%	Clam, red mullet.
Apr 2023 vs Apr 2022	EUR 0,1 million, +8%	294 tonnes, +3%	Other molluscs and aquatic invertebrates, clam, sprat.

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

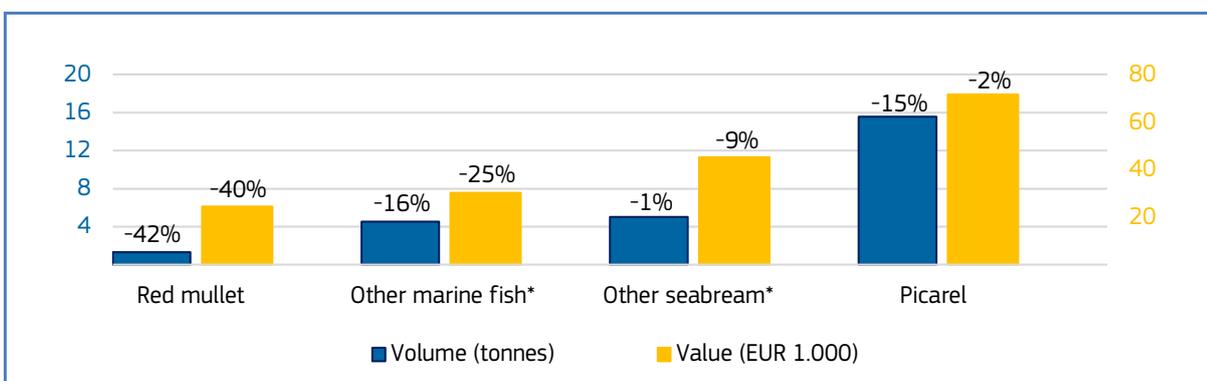


Percentages show change from the previous year. Metadata 2, Annex 3: <https://eumofa.eu/supply-balance-and-other-methodologies>

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

 Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2023 vs Jan-Apr 2022	EUR 0,8 million, +2%	111 tonnes, -4%	Value: squid, other seabream*, swordfish. Volume: picarel, red mullet, gilthead seabream.
Apr 2023 vs Apr 2022	EUR 0,2 million, -1%	32 tonnes, -7%	Red mullet, other marine fish*, other seabream*, picarel.

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



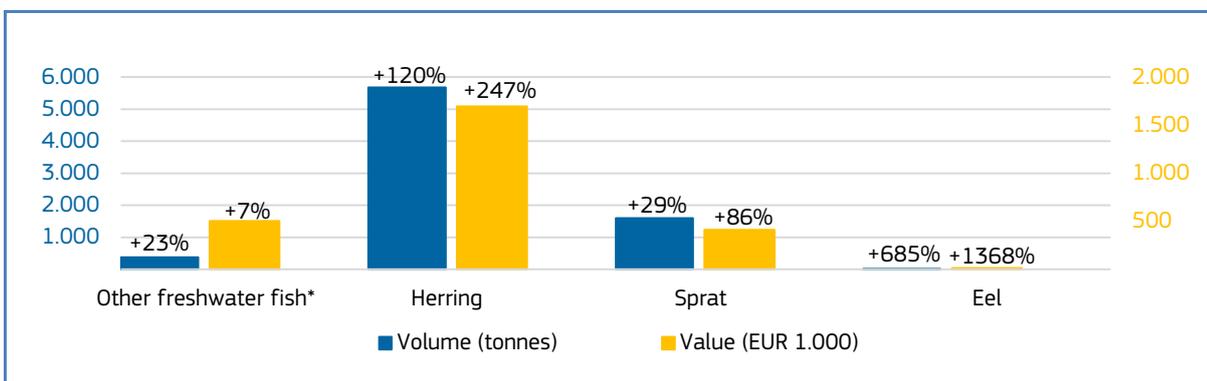
Percentages show change from the previous year. *EUMOFA aggregation for species.

³ First-sales data updated on 13.6. 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-Apr 2023 vs Jan-Apr 2022	EUR 10,1 million, +118%	32.215 tonnes, +88%	Herring, sprat, other freshwater fish*.	<p>First sales of herring increased significantly in April 2023 compared to April 2022, when higher market demand was observed. To satisfy the growing demand, suppliers shifted their usual supply to an earlier period in the year. A rise in prices had already been observed since August 2022. It was ascertained that sales in April 2023 were 20% higher compared to herring catches of the entire Estonian fleet. This might also be explained by foreign supplies of herring to the market. It is also possible that available resources, mild weather conditions, and capacity of suppliers enabled the provision of higher quantities of herring to the market at a higher rate.</p> <p>First sales of eel increased significantly in April 2023 compared to April 2022. Supply to the market depends on weather conditions and available fishing capacity. Given the small volume supplied to the market, it also creates a high percentage discrepancy. In April 2023, it is possible that available resources, mild weather conditions, and capacity of suppliers made possible higher quantities of eel to the market at a higher rate than in April 2022. The difference is about 1,3 tonnes.</p>
Apr 2023 vs Apr 2022	EUR 3,0 million, +99%	8.020 tonnes, +74%	Other freshwater fish*, herring, sprat, eel.	

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

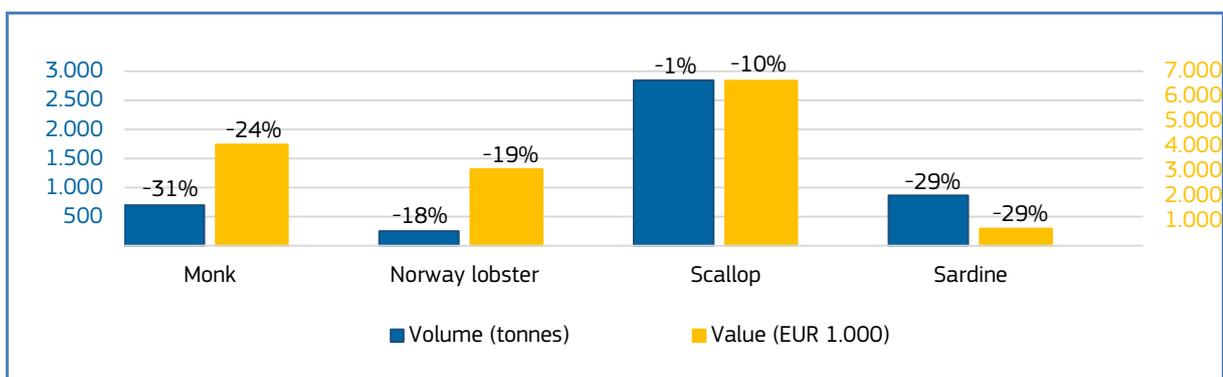


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2023 vs Jan-Apr 2022	EUR 239,5 million, -4%	67.245 tonnes, -6%	Eel, hake, whiting,, seaweed and other algae.
Apr 2023 vs Apr 2022	EUR 53,2 million, -14%	16.067 tonnes, -14%	Monk, Norway lobster, scallop, sardine.

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

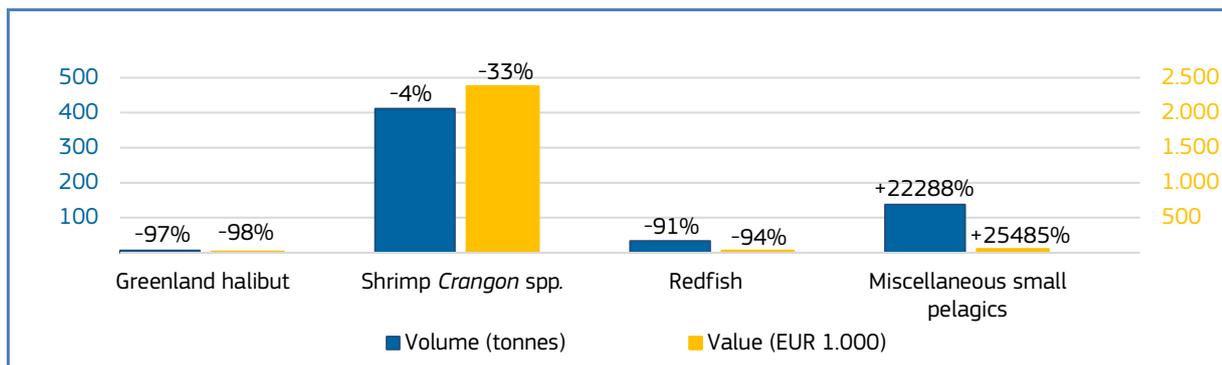


Percentages show change from the previous year.

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

 Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Apr 2023 vs Jan-Apr 2022	EUR 18,8 million, +20%	14.979 tonnes, +63%	Mackerel, blue whiting, Greenland halibut, cod.	A considerable increase in miscellaneous small pelagics was registered in April 2023 compared to April 2022 in terms of value and volume, both in the North and Baltic Sea. Production in the North Sea jumped from 615 kg in April 2022 to around 138 tonnes in April 2023, of which 132 tonnes were greater argentine. In the Baltic Sea, the main miscellaneous small pelagic species behind the increases in April 2023 was greater argentine with almost 96% of total sales of the group. First sales of Greenland halibut were lower in April 2023 compared to April 2022. The species is usually targeted on fishing trips lasting several weeks between June and December in the coastal waters of Western Greenland. In this regard, and in the context of rather good stock status, landings recorded in April 2022 appear to be the exception due to earlier start of the fishing season compared to 2023.
Apr 2023 vs Apr 2022	EUR 6,7 million, -16%	5.492 tonnes, +179%	Value: Greenland halibut, shrimp <i>Crangon</i> spp., redfish. Volume: blue whiting, miscellaneous small pelagics, cod.	

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

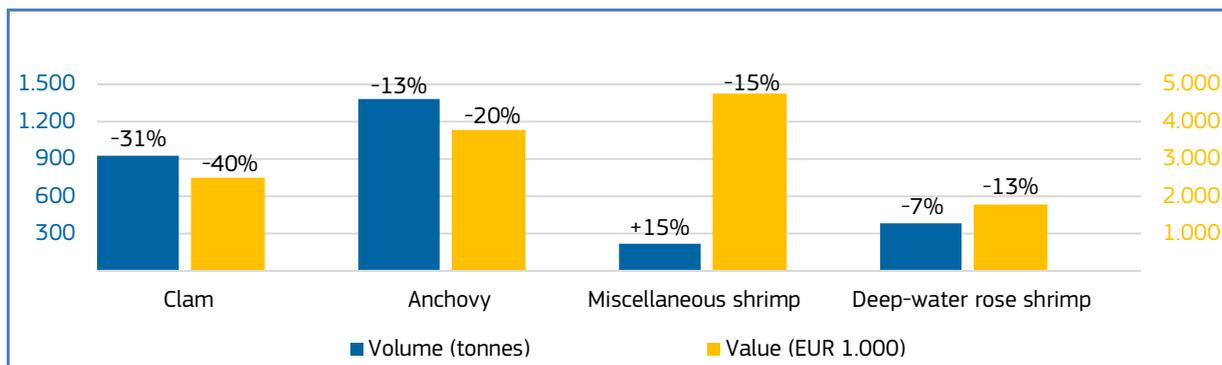


Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2023 vs Jan-Apr 2022	EUR 105,5 million, +1%	22.302 tonnes, +3%	Warmwater shrimps, cuttlefish, octopus, hake.
Apr 2023 vs Apr 2022	EUR 28,8 million, -11%	5.722 tonnes, -9%	Clam, anchovy, miscellaneous shrimp, deep-water rose shrimp.

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

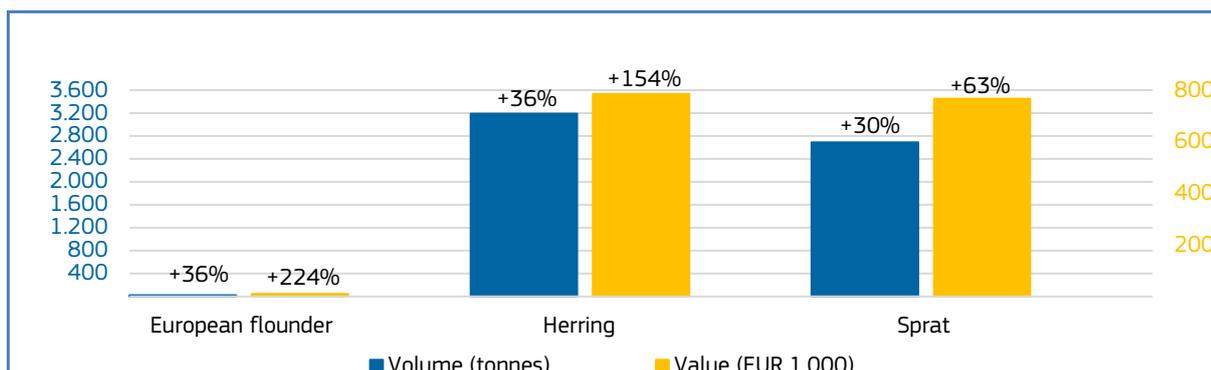


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2023 vs Jan-Apr 2022	EUR 5,1 million, +47%	19.747 tonnes, +20%	Herring, sprat, other marine fish*, European flounder.
Apr 2023 vs Apr 2022	EUR 1,6 million, +94%	5.986 tonnes, +51%	European flounder, herring, sprat.

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

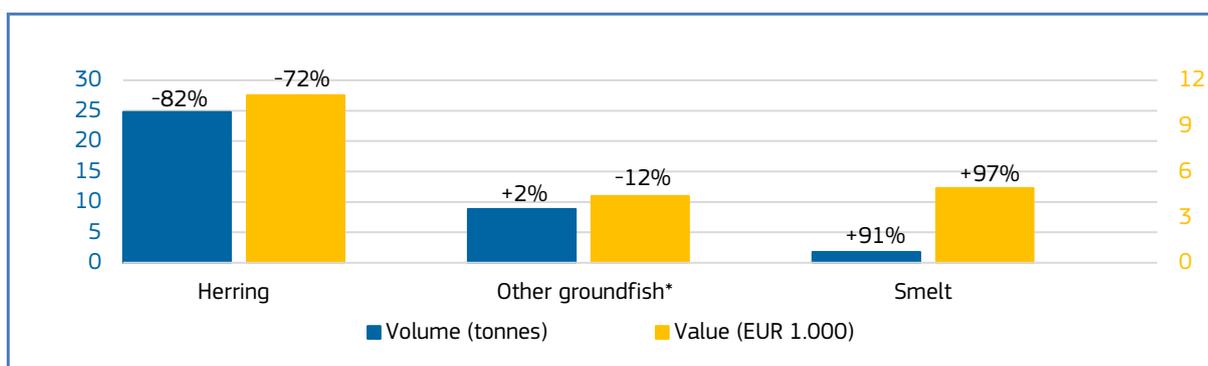


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Apr 2023 vs Jan-Apr 2022	EUR 0,4 million, +12%	132 tonnes, -79%	Value: Smelt, turbot, miscellaneous small pelagics. Volume: Herring, sprat, pike-perch.
Apr 2023 vs Apr 2022	EUR 0,022 million, -60%	36 tonnes, -80%	Herring, other groundfish*, smelt.

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



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

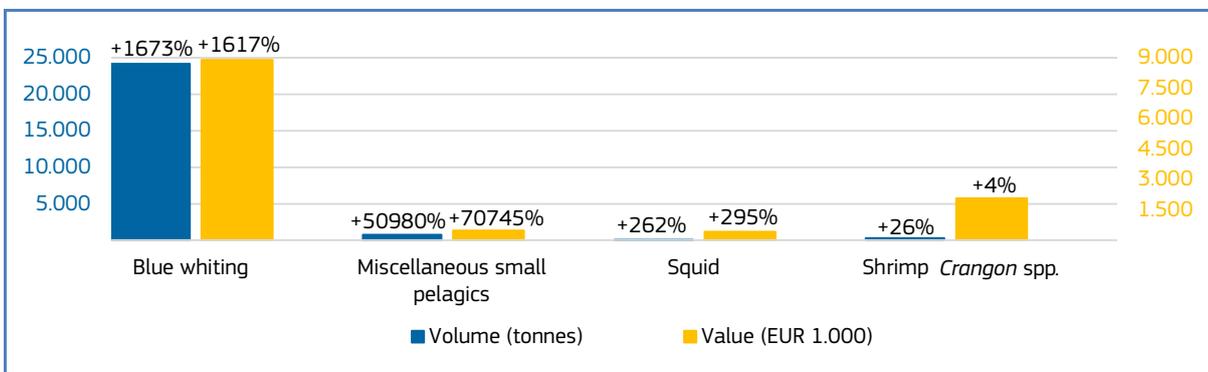
Table 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS**

 the Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Apr 2023 vs Jan-Apr 2022	EUR 71,2 million, -12%	79.790 tonnes, +2%	Value: Atlantic horse mackerel, common sole, herring. Volume: blue whiting, sardine, miscellaneous small pelagics.	In April 2023 there was a substantial increase in blue whiting compared to April 2022 in terms of value and volume. This can be explained by the high fluctuation in this fishery and the good status of the stock, with, among other things, lower fishing pressure below and healthy spawning-stock ⁴ . In fact, in November 2022, ICES updated its recommendation to increase the whole TAC to
Apr 2023 vs Apr 2022	EUR 18,4 million, +57%	26.515 tonnes, +553%	Blue whiting, miscellaneous small pelagics, squid, shrimp <i>Crangon</i> spp.	

⁴ ICES Advice 2022 – whb.27.1-91214 – <https://doi.org/10.17895/ices.advice.21493974>

				<p>1.359.629 tonnes. Moreover, monthly catches of most small pelagic species can fluctuate a lot. While the fishing season usually takes place between February and June, with a peak in April-May. Catches started very strong this year, with around 58.000 tonnes landed by the Dutch fleet over the first four months of 2023, as opposed to around 42.000 tonnes in the same period 2022 (+36%).</p> <p>In April 2023, a considerable increase in miscellaneous small pelagics was registered compared to April 2022 in terms of value and volume. This is possibly due to increasing production of greater argentine from 1,5 tonnes in April 2022 to 767 tonnes in April 2023. Moreover, in February 2022 as part of the yearly consultation with the UK under Article 498 of the Trade and Cooperation Agreement (TCA)⁵, it was decided to increase the EU TAC of greater silver smelt from 3.730 tonnes to around 11.620 tonnes (+212%). In the Netherlands, greater silver smelt (or greater argentine, <i>Argentina silus</i>) is often caught as unavoidable by-catch in the blue whiting fishery by the large freezer trawlers.</p> <p>Total first sales value and volume of squid in April 2023 were significantly higher compared to April 2022. This evolution can be explained mostly by natural factors. Natural cycles of cephalopods are highly heterogeneous, and abundance can vary strongly from year to year. Squid is also a short-life species. After a decrease in the population of squid observed over the last two years, it is now increasing, especially in the Eastern Channel and the South of the North Sea, where the stock is considered in a rather good state.</p>
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Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, APRIL 2023**



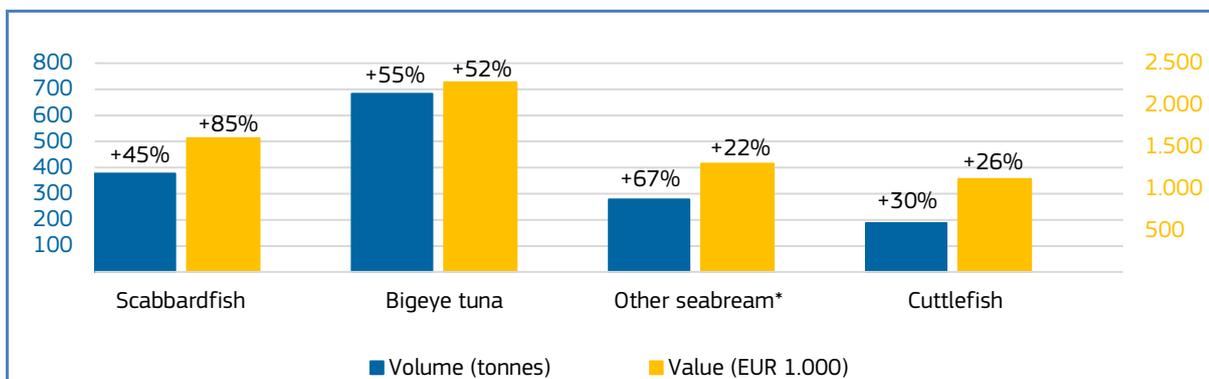
Percentages show change from the previous year.

⁵ COM(2022) 54 final. amending Regulation (EU) 2022/109 fixing for 2022 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in Union waters and for Union fishing vessels in certain non-Union waters. Available at : <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52022PC0054&from=EN>

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

 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2023 vs Jan-Apr 2022	EUR 88 million, +3%	21.564 tonnes, +7%	Scabbardfish, bigeye tuna, Atlantic horse mackerel, mackerel.
Apr 2023 vs Apr 2022	EUR 22,0 million, +3%	6.029 tonnes, +5%	Scabbardfish, bigeye tuna, other seabream*, cuttlefish.

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

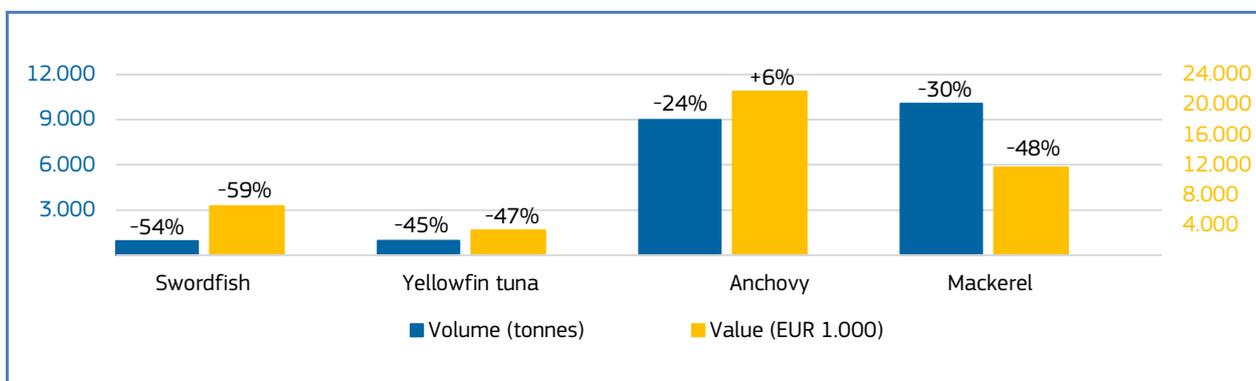


Percentages show change from the previous year. *EUMOFA aggregation for species

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

 Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2023 vs Jan-Apr 2022	EUR 447,1 million, -6%	135.525 tonnes, -6%	Swordfish, mackerel, octopus, Atlantic horse mackerel.
Apr 2023 vs Apr 2022	EUR 125,4 million, -21%	39.315 tonnes, -22%	Swordfish, yellowfin tuna, anchovy, mackerel.

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

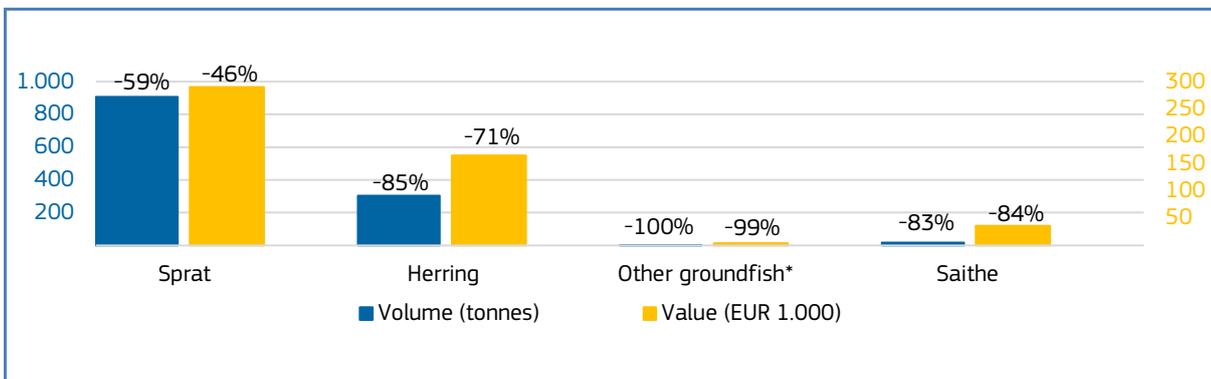


Percentages show change from the previous year.

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

 Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2023 vs Jan-Apr 2022	EUR 17,0 million, -36%	20.304 tonnes, -61%	Sprat, herring, cold-water shrimps, mackerel.
Apr 2023 vs Apr 2022	EUR 3,3 million, -33%	1.608 tonnes, -79%	Sprat, herring, other goundfish*, saithe.

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

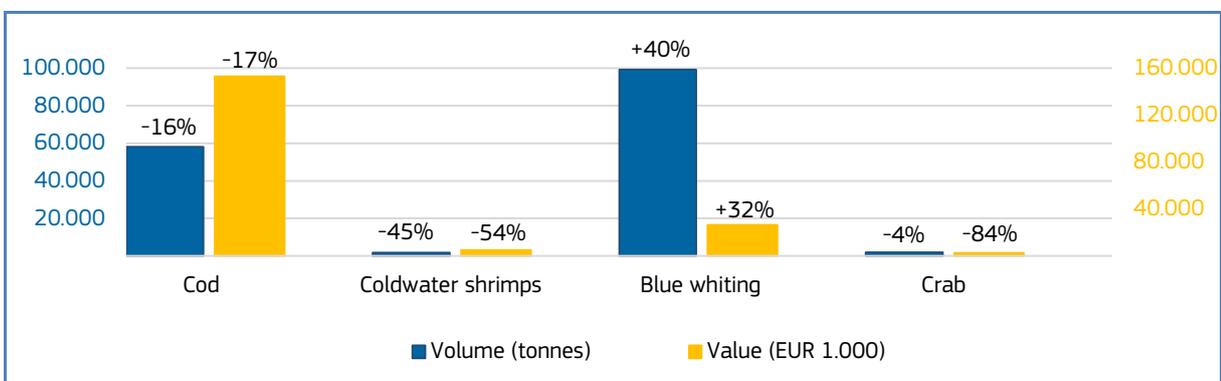


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2023 vs Jan-Apr 2022	EUR 1.292,5 million, -4%	1.300.167 tonnes, +13%	Value: cod, crab, haddock. Volume: blue whiting, haddock, other crustaceans*.
Apr 2023 vs Apr 2022	EUR 253,2 million, -18%	262.727 tonnes, +12%	Value: cod, coldwater shrimps, crab. Volume: blue whiting, seaweed and other algae, saithe.

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

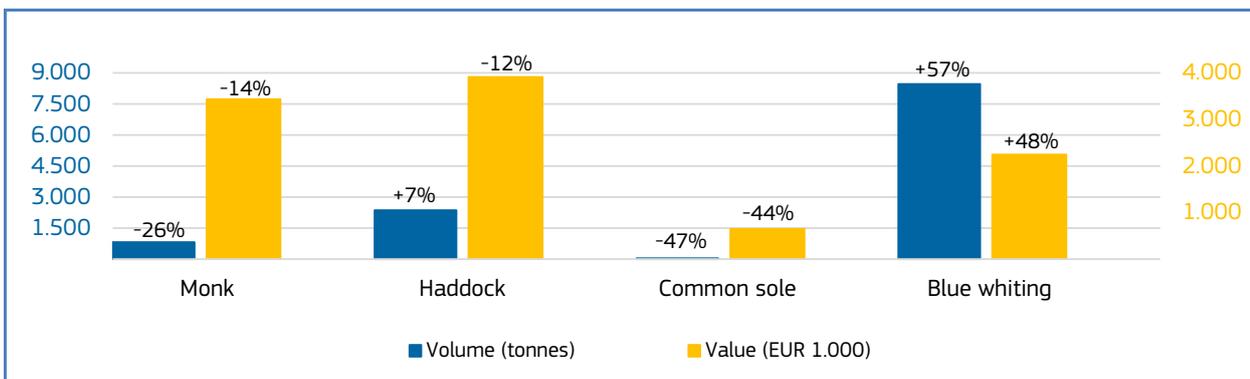


Percentages show change from the previous year. *EUMOFA aggregation for species.

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-Apr 2023 vs Jan-Apr 2022	EUR 212,4 million, +6%	126.048 tonnes, +19%	Norway lobster, blue whiting, cod, mackerel.
Apr 2023 vs Apr 2022	EUR 38,7 million, -2%	21.327 tonnes, +20%	Value: monk, haddock, common sole. Volume: blue whiting, cod, other molluscs and aquatic invertebrates*.

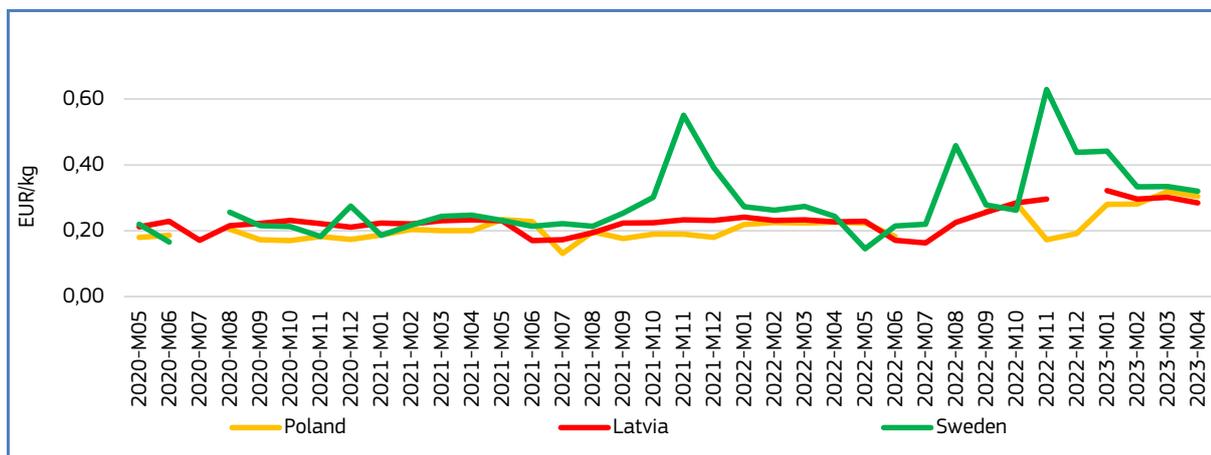
Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, APRIL 2023**



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

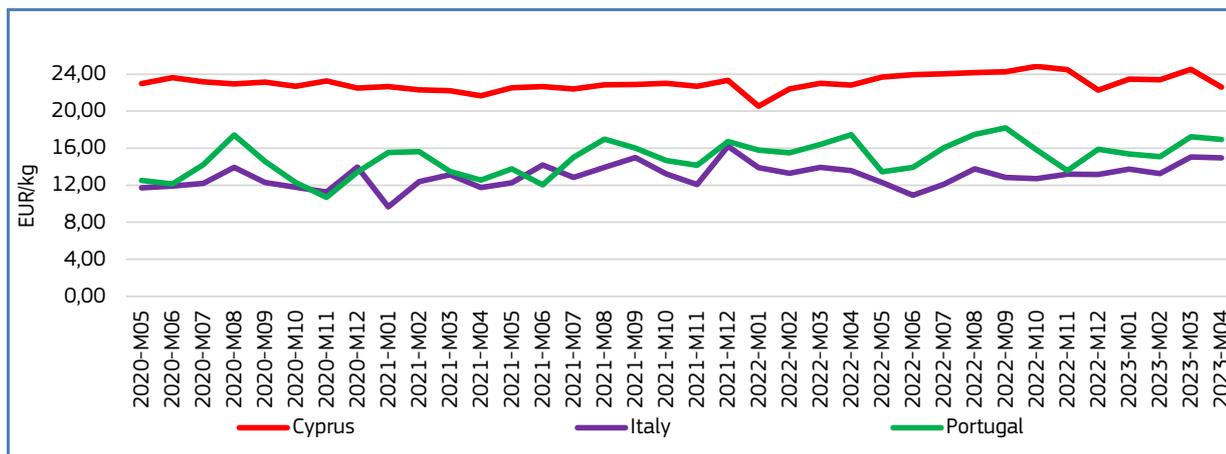
1.4. Comparison of first sales prices of selected species in selected countries⁶

Figure 15. **FIRST SALES PRICES OF EUROPEAN SPRAT IN POLAND, LATVIA, AND SWEDEN**



EU first sales of **European sprat** occur in several countries such as **Poland, Latvia** and **Sweden**. In April 2023, the average first-sales prices of European sprat were: 0,30 EUR/kg in Poland (down by 5% from the previous month and up by 34% from April 2022); 0,28 EUR/kg in Latvia (down by 5% from previous month and up by 25% from April 2022) and 0,32 EUR/kg in Sweden (down by 4% from the previous month and up by 31% from the previous year). In April 2023, supply increased in Latvia (+30%) while it decreased in Poland (-86%) and in Sweden (-59%) relative to the previous year. Supply fluctuates greatly in the three countries analysed. In Poland volumes in February, March and April 2023 decreased strongly compared to the same period in 2022 and 2021, the interval when the maximum levels of supply for this species were registered. In Latvia supply has been consistent over the time analysed with peaks occurring most often in March-April and October-November. In Sweden supply fluctuated greatly and has been decreasing over the period analysed, reaching the maximum volume of 16.542 tonnes in January 2022. Between months 05/2020 to 04/2023, prices increased in the three markets analysed, showing strong seasonal peaks in Sweden in November and December.

Figure 16. **FIRST SALES PRICES OF RED PORGY IN CYPRUS, ITALY AND PORTUGAL**

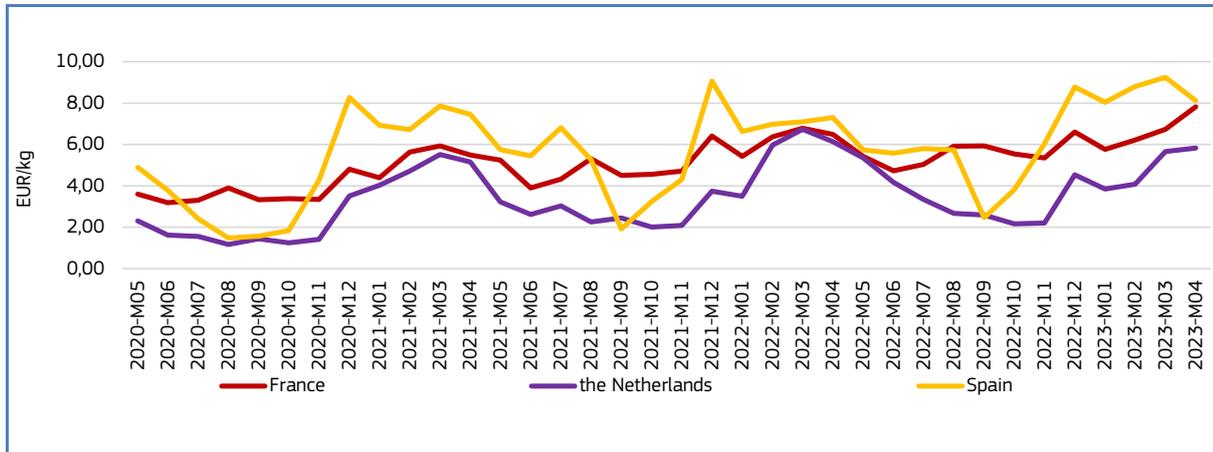


EU first sales of **red porgy** occur in several countries including **Cyprus, Italy** and **Portugal**. In April 2023, the average first-sales prices of red porgy were 22,59 EUR/kg in Cyprus (down by 8% from the previous month and by 1% from the previous year), 14,96 EUR/kg in Italy (down from March 2023 by 1% and up from April 2022 by 10%), and 16,94 EUR/kg in Portugal (down from both the previous month and year by 2% and 3% respectively). In April 2023, supply relative to the previous year increased in the three markets: +5% in Cyprus, in +30% Italy, and +59% in Portugal. In the three countries analysed, volume seems to peak in similar periods of the year: specifically, between May-July and October- November in Cyprus, between June-August and October-November in Italy and between May-July and October-November in Portugal.

⁶ First sales data updated on 13.6.2023.

Between months 05/2020 to 04/2023, prices fluctuated greatly in Italy and Portugal where prices ranged between 9,64 EUR/kg and 16,19 EUR/kg and 10,69 EUR/kg and 18,19 EUR/kg respectively. However, prices in Cyprus were quite stable, reaching the highest price of 24,85 EUR/kg in October 2022.

Figure 17. **FIRST SALES PRICES OF EDIBLE CRAB IN FRANCE, THE NETHERLANDS AND SPAIN.**

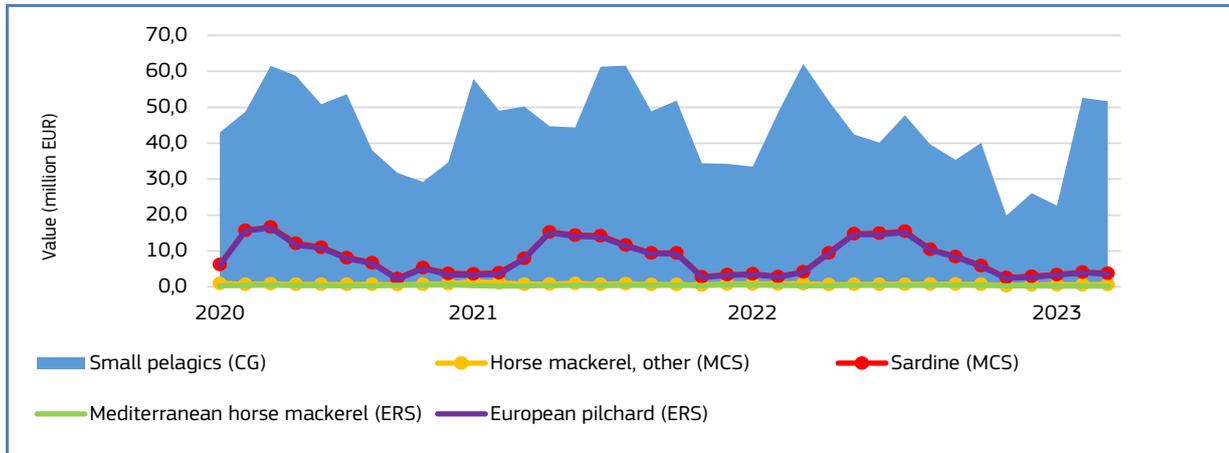


EU first sales of **edible crab** occur in several countries as well as in **France, the Netherlands** and **Spain**. In April 2023, the average first-sales prices of edible crab were 7,82 EUR/kg in France (up from the previous month by 16% and up from the previous year by 21%), 5,82 EUR/kg in the Netherlands (up from the previous month by 3% and down from April 2022 by 5%), and 8,12 EUR/kg in Spain (down by 12% from March 2023 and up by 11% from April 2022). In April 2023, supply increased in Spain (+37%) and decreased in France (-55%) and the Netherlands (-70%) relative to the previous year. Supply shows seasonal behaviour with peaks occurring most often in July and August in France. August and October-November in the Netherlands and May-June and November-December in Spain. Between months 05/2020 to 04/2023, prices increased in the three markets analysed showing strong fluctuations. Prices in Spain show seasonal drops in September, while in the Netherlands seasonal peaks occur in March. In France prices have been increasing constantly, reaching the maximum value of 7,82 EUR/kg in April 2023. The increasing price could be explained by the significant decrease in catches given concerns about the status of the stock due to decreasing abundance around British Islands. The decline could be linked to increasing water temperature or disease, but more research and data are needed at this stage.⁷

⁷ <https://www.eumofa.eu/documents/20178/540461/MH+4+2023+EN.pdf/00988033-b4d5-5815-90ae-6c670125ca50?t=1682515933952>

1.5. Commodity group of the month: small pelagics⁸

Figure 18. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES⁹, MAY 2020 - APRIL 2023**



In April 2023, the “**small pelagics**” commodity group (CG¹⁰) recorded the highest first-sales value and volume out of the 10 CGs in the countries monitored by EUMOFA¹¹. In the reporting countries covered by the EUMOFA database, first sales of “small pelagics” totalled a value of EUR 51,7 million and a volume of 43.664 tonnes, representing a 17% decrease in value and 12% decrease in volume compared to April 2022. In the past 36 months, the highest first-sales value of small pelagics was registered in April 2022 at EUR 62 million.

The “small pelagics” commodity group includes seven Main Commercial Species (MCS): anchovy, herring, Atlantic horse mackerel, mackerel, sardine, sprat and miscellaneous small pelagics¹².

At the Electronic Recording and Reporting System (ERS) level, European pilchard (7%) and Mediterranean horse mackerel (1%) together accounted for 8% of the total first-sales value for “small pelagics” recorded in April 2023.

1.6. Focus on European pilchard



European pilchard, commonly known as pilchard or sardine (*Sardina pilchardus*), is the most distributed small pelagic fish species in European waters. It is a fast-growing migratory pelagic species typically found at depths of 25–55 m during the day, and 10–35 m at night. It has high fecundity, can reach lengths of 25 cm and lives between 10–12 years on average. The species feeds mainly on plankton and crustaceans. European pilchard is found in the Northeast Atlantic, the Mediterranean and the Black Sea. The species breeds at the age of 1-2 years. Depending on sea basin topography and temperature, breeding may occur in inshore areas at depths of 20–25m, or as far out as 100km from the shore¹³. European pilchard is caught mostly by purse seiners and pelagic trawlers, as well as by small-scale vessels. In the EU Atlantic waters, two stocks are relevant to fisheries management: the Northern stock (ICES Subareas VII and VIIIa, b, d) fished mainly by France, Spain, the Netherlands and the UK, and the Southern stock (ICES Subarea VIIIc and Division IXa) fished by purse seiners from Croatia, Italy, Spain and Portugal. The species is commercially important for fisheries and processing industries (canning)¹⁴. Management measures for the Northern stock include technical measures and limits on purse seine licensing in French waters. Management measures for the Southern stock include technical measures and limits on fishing effort and catches (closure periods and maximum volume of landings). In the EU, the minimum size is 11 cm or 55 specimens per kg. Pilchard is caught year-round, with peaks in summer¹⁵.

⁸ First sales data updated on 17.5.2023.

⁹ Norway and the UK excluded from the analyses.

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

¹¹ More data on commodity groups can be found in Table 1.2 of the Annex.

¹² Greater argentine accounts for the highest first-sales value and volume within the miscellaneous small pelagics category.

¹³ <http://www.fao.org/fishery/species/2910/en>

¹⁴ <http://www.fao.org/fishery/species/2910/en>

¹⁵ Council Regulation (EC) No 1967/2006 <https://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1481546248599&uri=CELEX:32006R1967>

We have covered **European pilchard** in the following *Monthly Highlights*:

First sales: MH 11/2020 (the Netherlands, Portugal, Spain), MH 9/2018 (France, Italy, the United Kingdom), MH 8/2017 (France, Greece, Italy), MH 3/2016 (Greece), MH 5/2015 (Portugal), MH February/2013 (Portugal), MH July/2013 (Greece).

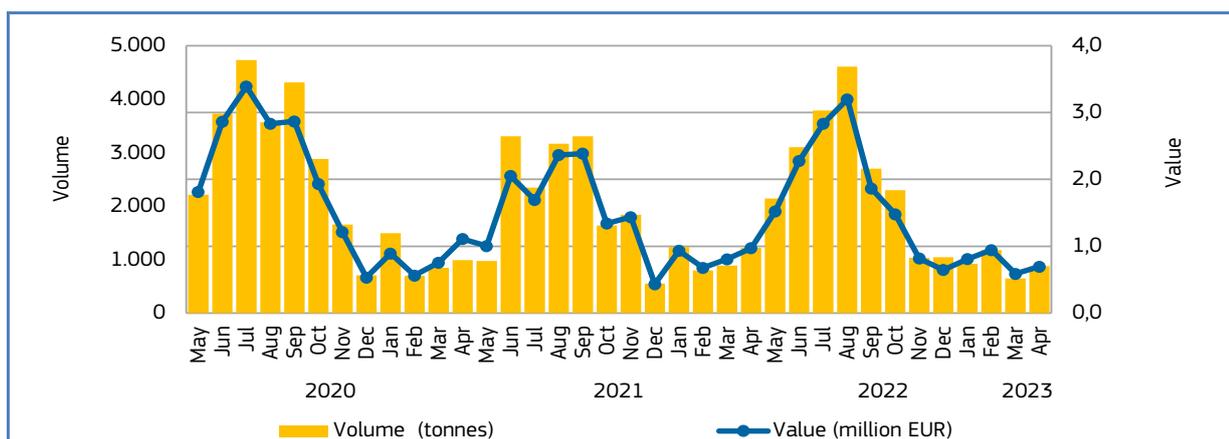
Topic of the month: MH 6/2016 “Sardine market in the EU”, MH 5/2021 “Species profile about sardine and sardine-type products”

Selected countries

Table 17. **COMPARISON OF EUROPEAN PILCHARD FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "SMALL PELAGICS" IN SELECTED COUNTRIES**

European pilchard		Changes in European pilchard first sales Jan-Apr 2023 (%)		Contribution of European pilchard to total “small pelagics” first sales in April 2023 (%)	Principal places of sale Jan-Apr 2023 in terms of first-sales value
		Compared to Jan-Apr 2022	Compared to Jan-Apr 2021		
France	Value	-10%	-9%	42%	Douarnenez, St Jean-de-Luz, Boulogne-sur-Mer.
	Volume	-13%	-10%	59%	
Portugal	Value	+453%	+1113%	0,05%	Matosinhos, Sesimbra, Aveiro.
	Volume	+294%	+1099%	0,03%	
Spain	Value	+6%	+24%	18%	Pasajes, Ondárroa, Isla Cristina.
	Volume	+25%	+52%	26%	

Figure 19. **EUROPEAN PILCHARD: FIRST SALES IN FRANCE, MAY 2020 - APRIL 2023**



The Northern stock (ICES Sub-areas VII and VIII a, b, d) of sardine is fished by the French fleet¹⁶. Over the past 36 months in **France**, the highest first-sales of European pilchard were in July 2020 when 4.732 tonnes were sold for EUR 3,4 million. The main fishing season occurs during the warmer period of year, in principle from May to September.

¹⁶ [https://www.europarl.europa.eu/RegData/etudes/STUD/2015/563412/IPOL_STU\(2015\)563412_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2015/563412/IPOL_STU(2015)563412_EN.pdf)

Figure 20. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN FRANCE IN VALUE AND VOLUME, APRIL 2023**

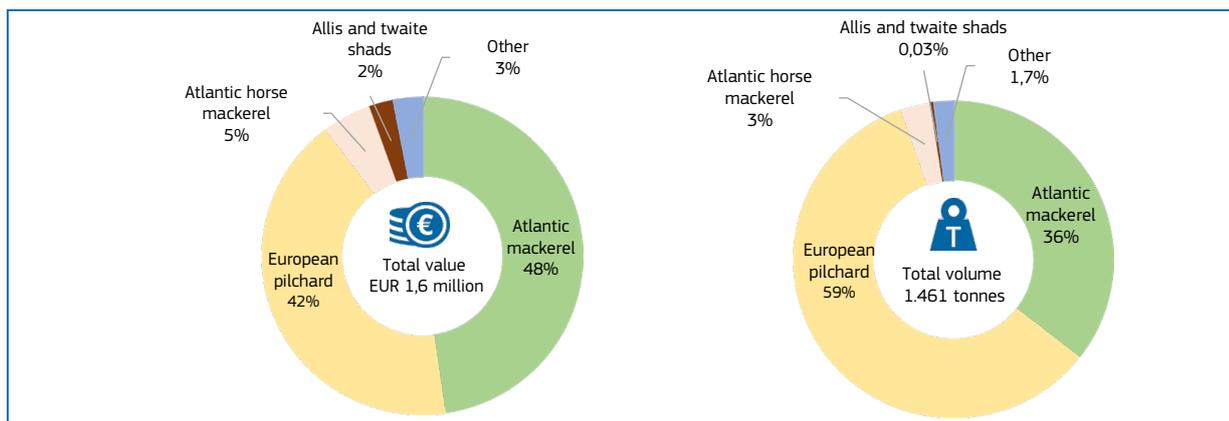
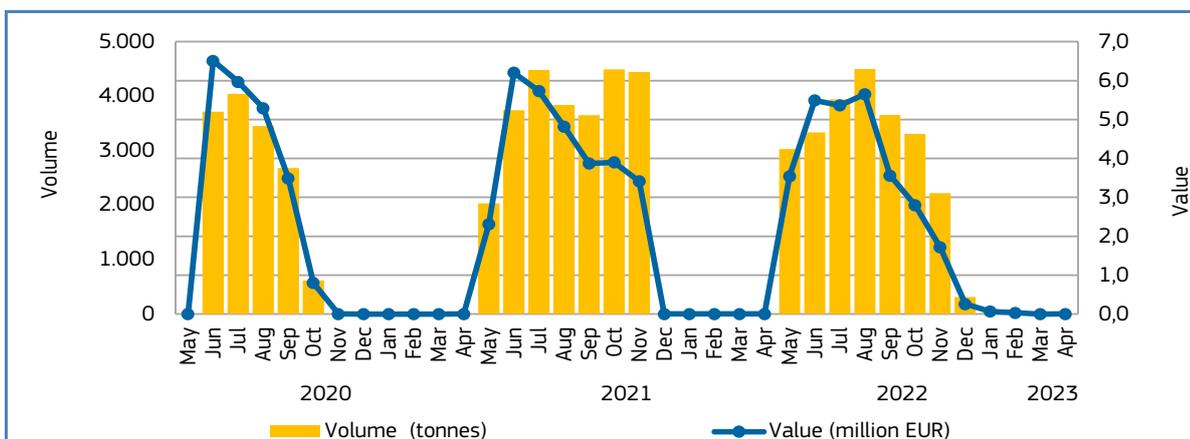
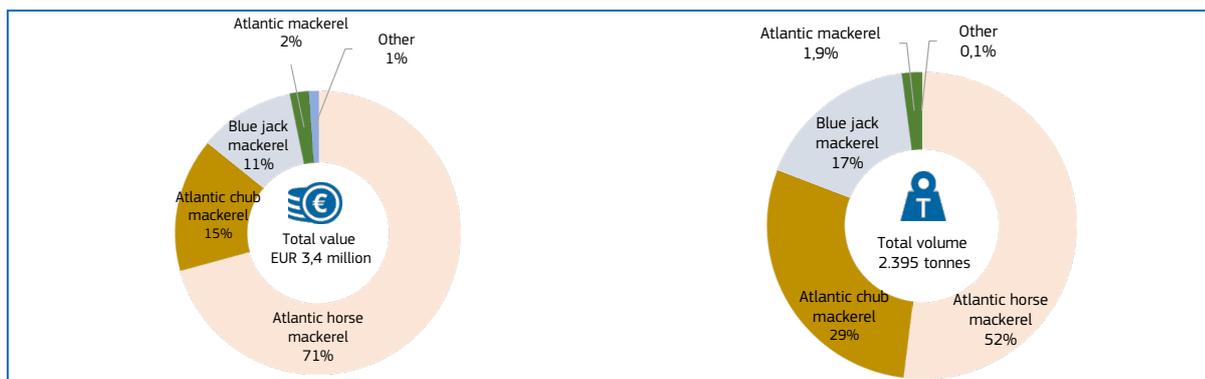


Figure 21. **EUROPEAN PILCHARD: FIRST SALES IN THE PORTUGAL, MAY 2020 - APRIL 2023**



The Portuguese fishing fleet targets the Southern pilchard stock¹⁷. Over the past 36 months in **Portugal**, the highest first-sales value was in June 2020 with EUR 6,5 million for 3,715 tonnes, and first-sales volume was in August 2022 with 4,496 tonnes for EUR 5,7 million. The European pilchard purse-seine fishery in Portugal lasts mainly from May to November and is subject to a management plan¹⁸. Most catches are taken off the northern coast by purse seines, while the remainder is taken as by-catch in the pelagic trawl fishery.

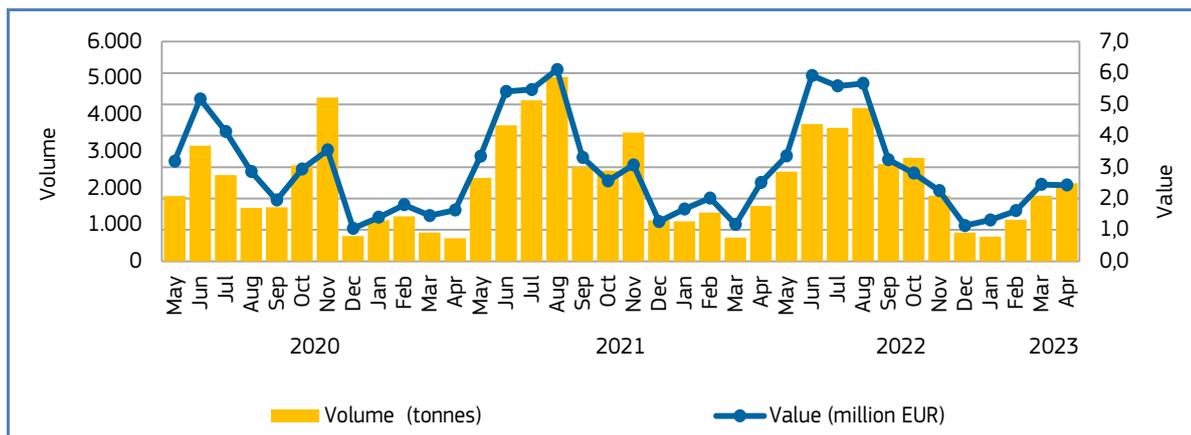
Figure 22. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN PORTUGAL IN VALUE AND VOLUME, APRIL 2023**



¹⁷ [https://www.europarl.europa.eu/RegData/etudes/STUD/2015/563412/IPOL_STU\(2015\)563412_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2015/563412/IPOL_STU(2015)563412_EN.pdf)

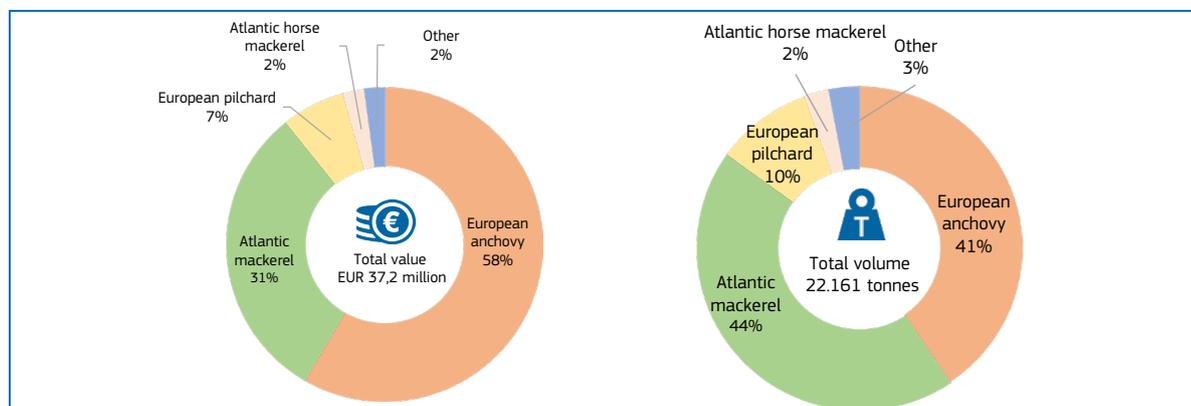
¹⁸ <https://www.dgrm.mm.gov.pt/en/web/guest/peixes>

Figure 23. **EUROPEAN PILCHARD: FIRST SALES IN SPAIN, MAY 2020 - APRIL 2023**



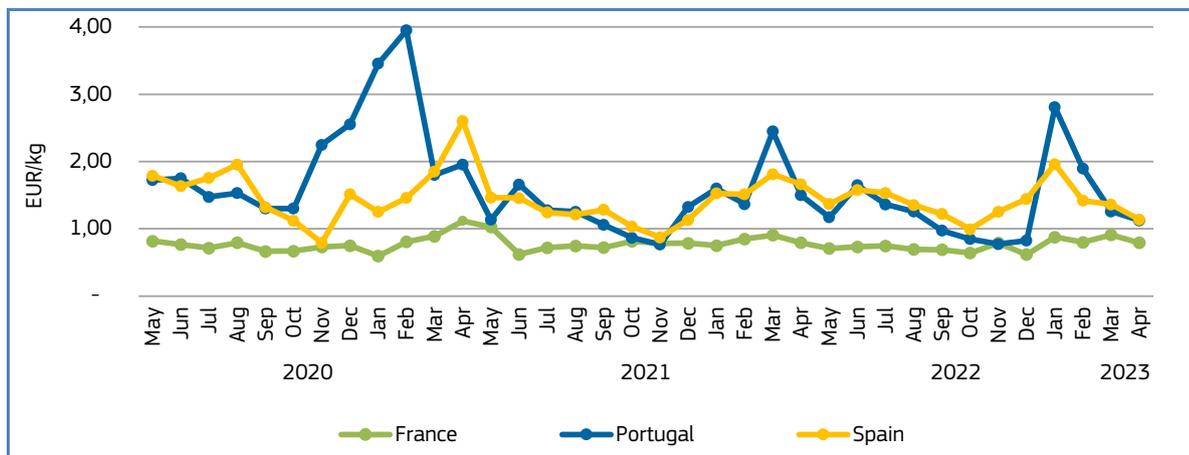
Over the past 36 months in **Spain**, the highest first-sales volume of European pilchard occurred in August 2021 when 5.032 tonnes were sold for EUR 6,1 million. The main European pilchard fishing season occurs in the summer with the purse seine fleet.

Figure 24. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, APRIL 2023**



Price trend

Figure 25. **EUROPEAN PILCHARD: FIRST-SALES PRICES IN SELECTED COUNTRIES, MAY 2020 - APRIL 2023**



Over the 36-month observation period (May 2020 to April 2023), the weighted average first-sales price of European pilchard in **Spain** was 1,35 EUR/kg, 9% higher than in **Portugal** (1,23 EUR/kg), and 81% higher than in **France** (0,74 EUR/kg).

In **France** in April 2023, the average first-sales price of European pilchard (0,79 EUR/kg) remained the same compared to April 2022, while it decreased by 29% compared with April 2021. Over the past 36 months, the average price ranged from 0,60 EUR/kg for 1.495 tonnes in January 2021 to 1,12 EUR/kg for 994 tonnes in April 2021.

In **Portugal** in April 2023, the average first-sales price of European pilchard (1,13 EUR/kg) decreased by 25% compared to the same month of 2022 and by 42% from April 2021. During the period observed, the lowest average price (0,77 EUR/kg for 4.444 tonnes) was in September 2021, while the highest average price (3,95 EUR/kg for 317 kg) was recorded in February 2021.

In **Spain** in April 2023, the average first-sales price of European pilchard (1,14 EUR/kg) decreased by 31% from April 2022 and by 56% from April 2021. During the period observed, the average price ranged from 0,79 EUR/kg for 4.471 tonnes in November 2020 to 2,60 EUR/kg for 626 tonnes in April 2021.

1.7. Focus on Mediterranean horse mackerel



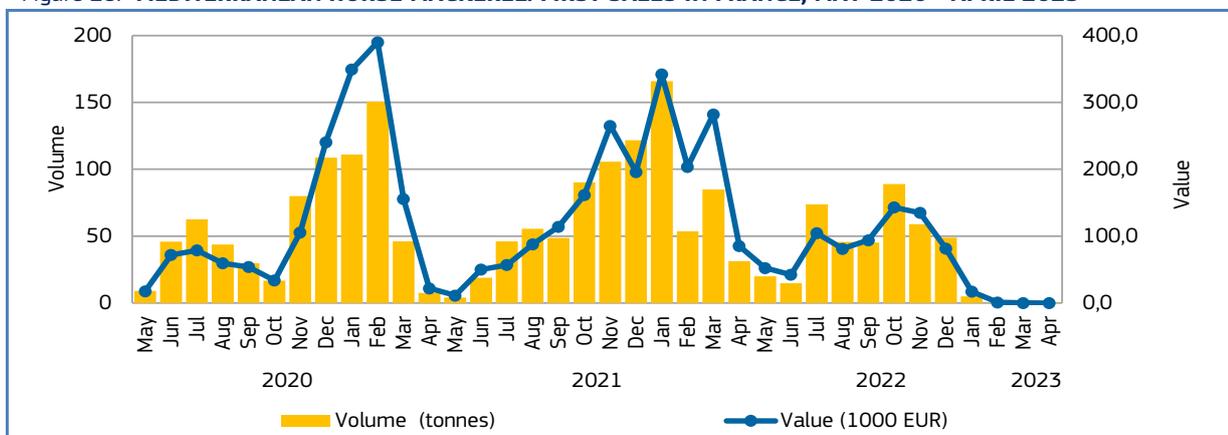
Mediterranean horse mackerel (*Trachurus mediterraneus*) is a member of the Carangidae family and is an important fishing resource in the Mediterranean Sea. It is usually found at a depth range of 5 -250 metres but can also reach 500 metres. Adults are usually found near the bottom, at times also in surface waters.¹⁹ It is a fast-growing species that migrates in large schools. The reproductive season is between May and August, with pelagic eggs, and sexual maturity is reached at two years of age around 16 cm in length for both males and females²⁰. It is a semi-pelagic carnivorous fish which feeds on other fishes especially sardines, anchovies, etc. and small crustaceans.²¹ It is distributed throughout the Mediterranean, Marmara and Black Seas, and along the eastern Atlantic coast from Morocco to the English Channel.²² Mediterranean horse mackerel is targeted by a small number of fleets, and is caught by bottom trawl, purse-seine and other artisanal gears. The management of the species is under a combined Total Allowable Catch (TAC) with other species: southern horse mackerel and blue jack mackerel. In addition to TACs, the fishery is managed by an EU minimum landing size of 15 cm²³. For human consumption it is sold fresh, smoked, canned and frozen.

Selected countries

Table 18. COMPARISON OF MEDITERRANEAN HORSE MACKEREL FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF “SMALL PELAGICS” IN SELECTED COUNTRIES

Mediterranean horse mackerel		Changes in Mediterranean horse mackerel first sales Jan-Apr 2023 (%)		Contribution of Mediterranean horse mackerel to total “small pelagics” first sales in April 2023 (%)	Principal places of sales in Jan-Apr 2023 in terms of first-sales value
		Compared to Jan-Apr 2022	Compared to Jan-Apr 2021		
France	Value	-98%	-98%	0,05%	St Jean-de-Luz, Saint-Gilles-Croix-de-Vie, Les Sables-d’Olonne.
	Volume	-98%	-98%	0,04%	
Italy	Value	+14%	-8%	16%	Pescara, Porto Santo Stefano, Fiumicino.
	Volume	+17%	-12%	11%	
Spain	Value	-14%	+28%	0,6%	Almería, San Carlos de la Rápita, Benicarló.
	Volume	-32%	-19%	0,5%	

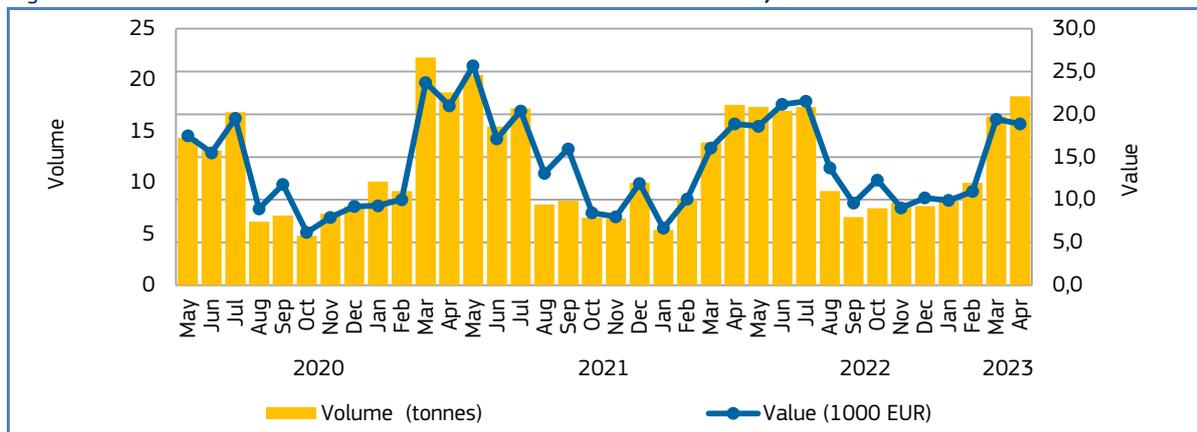
Figure 26. MEDITERRANEAN HORSE MACKEREL: FIRST SALES IN FRANCE, MAY 2020 - APRIL 2023



¹⁹ <https://www.fishbase.se/summary/trachurus-mediterraneus>
²⁰ <https://academic.oup.com/icesjms/article/54/2/267/620555?login=false>
²¹ <https://www.fishbase.se/summary/trachurus-mediterraneus>
²² <https://academic.oup.com/icesjms/article/61/5/774/865729>
²³ <https://www.mcsuk.org/goodfishguide/ratings/wild-capture/1008/>

In **France**, over the observed 36-month period, the highest first-sales value of Mediterranean horse mackerel was recorded in February 2021 at EUR 390.000, while the highest first-sales volume occurred in January 2022 when 166 tonnes were sold. With the exception of 2023, first sales were the highest in winter.

Figure 27. **MEDITERRANEAN HORSE MACKEREL: FIRST SALES IN ITALY, MAY 2020 - APRIL 2023**



In **Italy** over the past 36 months, first-sales value was the highest in May 2021 with EUR 26.000 for 21 tonnes sold. The highest first-sales volume was recorded in spring 2021 peaking in March when 22 tonnes were sold for EUR 24.000. In general, first sales are the highest in spring and summer when sardine and anchovy fishery is the most intense. Mediterranean horse mackerel is a by-catch species.

Figure 28. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN ITALY IN VALUE AND VOLUME, APRIL 2023**

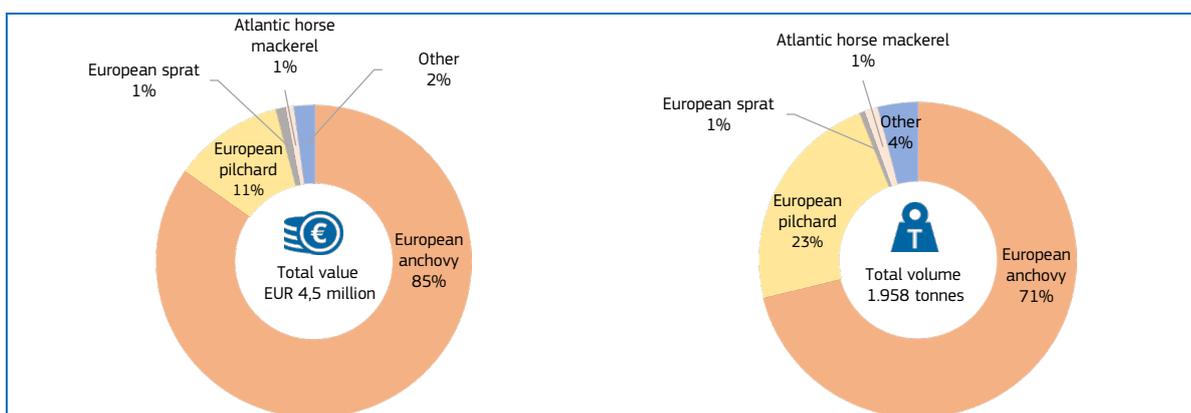
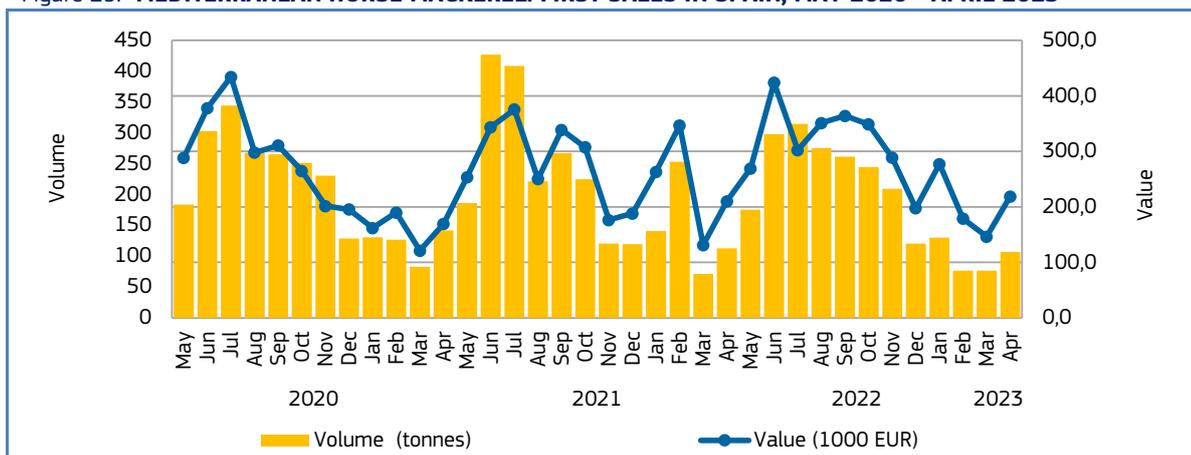


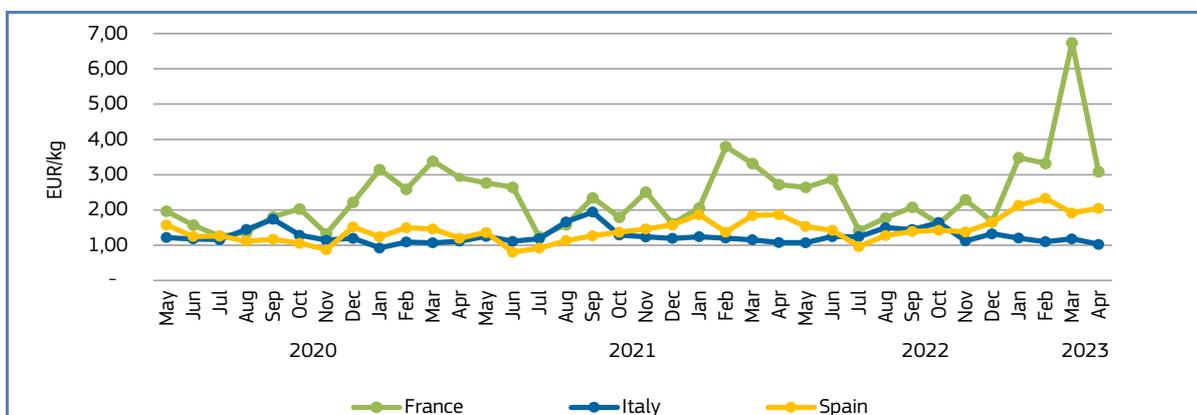
Figure 29. **MEDITERRANEAN HORSE MACKEREL: FIRST SALES IN SPAIN, MAY 2020 - APRIL 2023**



In **Spain** over the past 36 months, the highest first-sales value of Mediterranean horse mackerel was recorded in July 2020, when 344 tonnes were sold for EUR 434.000. The highest first-sales volume was in June 2021 when 427 tonnes were sold for almost EUR 344.000. Generally, sales were highest during the summer, mainly in June and July in each observed year.

Price trend

Figure 30. **MEDITERRANEAN HORSE MACKEREL: FIRST-SALES PRICES IN SELECTED COUNTRIES, MAY 2020 - APRIL 2023**



Over the 36-month observation period (May 2020 – April 2023), the weighted average first-sales price of Mediterranean horse mackerel in **France** was 2,16 EUR/kg, 78% higher than that of **Italy** (1,21 EUR/kg), and 65% above the average price in **Spain** (1,31 EUR/kg).

In **France** in April 2023, the average first-sales price of Mediterranean horse mackerel (3,08 EUR/kg) increased by 13% compared to April 2022 and by 6% compared to April 2021. The lowest average price was recorded in July 2021 at 1,23 EUR/kg for 46 tonnes, while the highest average price of 6,74 EUR/kg for 28 kg was recorded in March 2023.

In **Italy** in April 2023, the average first-sales price of Mediterranean horse mackerel was 1,03 EUR/kg, 4% and 8% down from April 2022 and 2021 respectively. The lowest price in the past 36 months was recorded in January 2021, at 0,92 EUR/kg for 10 tonnes. The highest price (1,94 EUR/kg for 8 tonnes) was recorded in September 2021.

In **Spain** in April 2023, the average first-sales price of Mediterranean horse mackerel was 2,05 EUR/kg. That was 10% more than the first sales price in April 2022 and 71% higher than in April 2021. The lowest average price was recorded in June 2021 at 0,81 EUR/kg for 427 tonnes. The highest average price at 2,33 EUR/kg for 77 tonnes was recorded in February 2023.

2. Extra-EU imports

The weekly extra-EU import prices (weighted average values per week, in EUR per kg) for nine different species are examined every month. The three most relevant species in terms of value and volume remain consistent: fresh whole Atlantic salmon from Norway, frozen Alaska pollock fillets from China, and frozen tropical shrimp (*Penaeus* spp.) from Ecuador. The other six species change each month; three are chosen from the commodity group of the month, and three are randomly selected. The commodity group for this month is “small pelagics”²⁴.

Data analysed in the section “Extra-EU imports” are extracted from EUMOFA, as collected from the European Commission²⁵.

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 19/2023	Preceding 4-week average	Week 19/2022	Notes
Fresh whole Atlantic salmon imported from Norway (<i>Salmo salar</i> , CN code 03021400)	Price (EUR/kg)	9,03	9,54 (-5%)	8,13 (+11%)	From weeks 01/2023 to 19/2023 prices have been fluctuating and shown an increasing trend, as well as the past three years. Price ranged between 11,28 EUR/kg (week 16/2022) and 4,32 EUR/kg (week 44/2020)
	Volume (tonnes)	6.546	10.200 (-36%)	12.297 (-47%)	Volumes show strong fluctuation with values ranging between 5.672 tonnes (week 15/2022) and 19.497 tonnes (week 35/2022). Supply shows a clear seasonality with peaks occurring most often in weeks 35/37, 40/42 and 49/50. Lowest peak seems to occur in weeks 13/15, 19 and 51/52.
Frozen Alaska pollock fillets imported from China (<i>Theragra chalcogramma</i> , CN code 03047500)	Price (EUR/kg)	3,44	3,50 (-2%)	3,34 (+3%)	Between weeks 01/2023 and 19/2023 prices showed some fluctuations and have been stabilising after the price drop at the end of 2022. Prices reached the minimum price of 1,84 in week 48/2022 after reaching their maximum value of 4,03 EUR/kg in week 41/2022.
	Volume (tonnes)	1.668	2.240 (-26%)	1.826 (-9%)	Weekly volumes over the last three years ranged between 843 tonnes (week 17 of 2022) to 6.758 tonnes (week 48 of 2022). Supply shows strong 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)	5,94	5,22 (+8%)	6,31 (-6%)	From week 01 and week 19 of 2023 prices fluctuated and showed an increasing trend, as well as for the past three years. Prices fluctuated strongly between 4,27 EUR/kg (week 38 of 2020) to 7,19 EUR/kg (week 41 of 2022).
	Volume (tonnes)	1.415	2.132 (-34%)	3.392 (-58%)	In the period analysed volumes showed high fluctuations, with minimum 891 tonnes (week 09/2023) and maximum 4.925 tonnes (week 33/2021). Peaks in supply seem to occur most often between weeks 10/11, 14/17, 31/33 and 45/46.

²⁴ The featured species of the commodity group of the month are frozen fillets of herring from Norway, frozen sardines from Morocco and frozen mackerel from the Faroe Islands. The three randomly selected species this month are prepared or preserved skipjack from Ecuador, frozen southern hake from Chile and frozen fillets of redfish from Iceland.

²⁵ Last update: 14.6.2023

Figure 31. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY, 2020 - 2023**

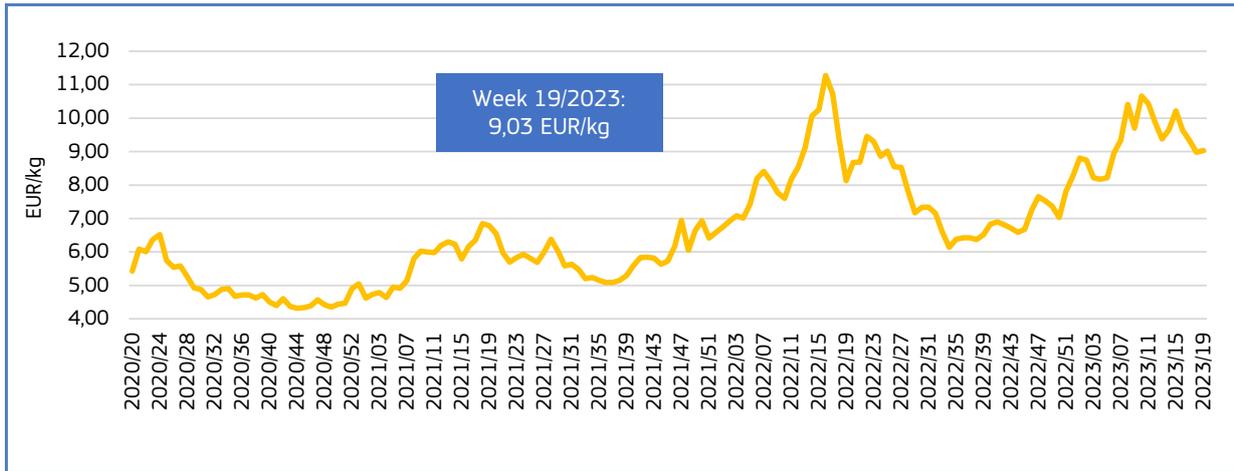


Figure 32. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2020 - 2023**

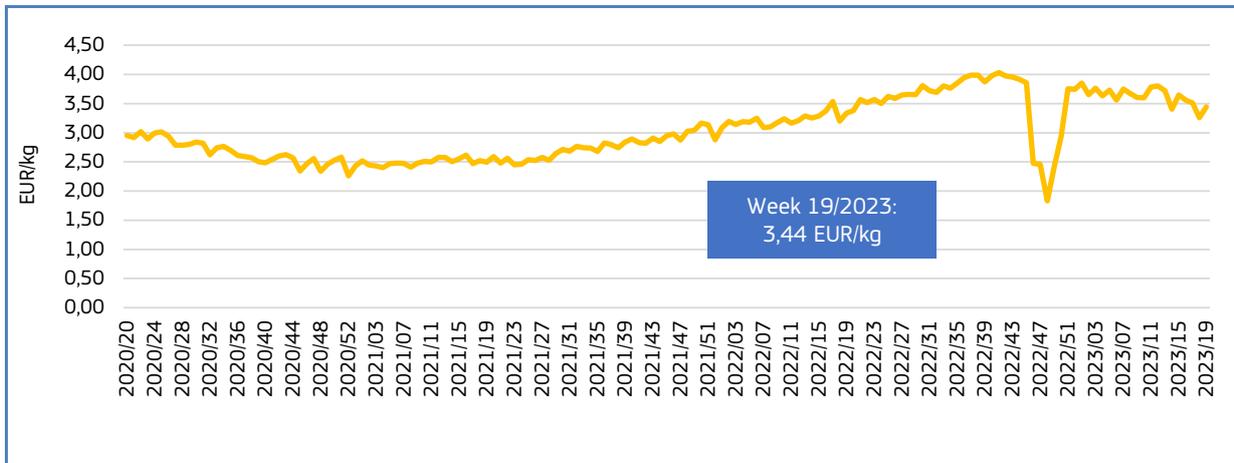


Figure 33. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2020 - 2023**

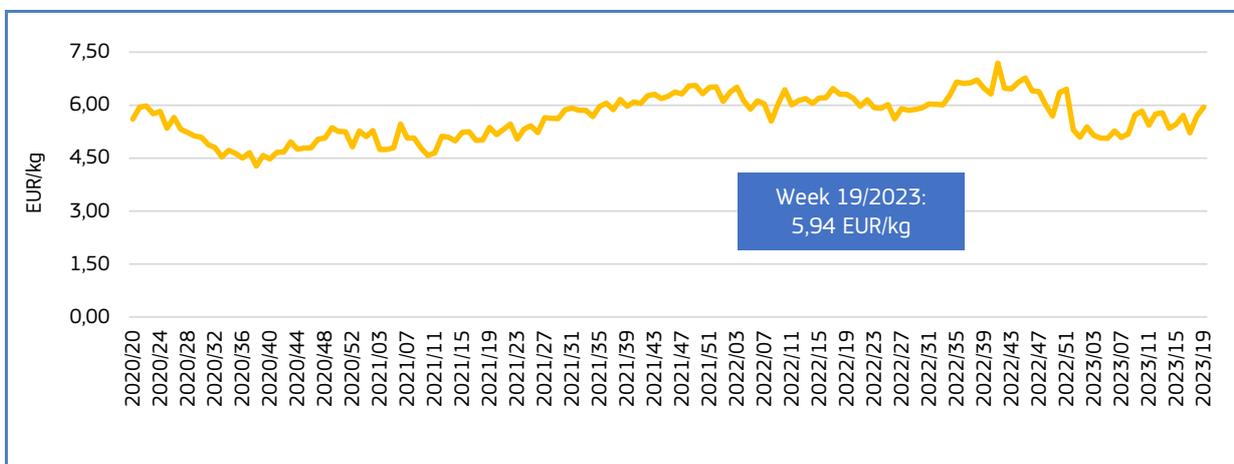


Table 20. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports	Week 19/2023	Preceding 4-week average	Week 19/2022	Notes	
Frozen fillets of herring from Norway (<i>Clupea harengus</i> , <i>Clupea pallasii</i> CN code 03048600)	Price (EUR/kg)	1,76	1,71 (+3%)	1,67 (+5%)	Between weeks 20/2020 and 19/2023 prices showed a steady increasing trend with peaks in prices between weeks 34 and 39. Prices ranged from 1,31 EUR/kg (week 21 of 2020) to 2,22 EUR/kg (week 39 of 2022). 71% of the weekly prices were between 1,50 EUR/kg and 1,75 EUR/kg.
	Volume (tonnes)	258	568 (-54%)	305 (-15%)	Supply seems to peak most often between weeks 04/05, 47/48 and 50. Volumes show high fluctuations ranging from 165 tonnes (week 25/2021) to 3.849 tonnes (week 10/2023). 45% of the weekly supply was less than 600 tonnes.
Frozen sardines from Morocco (<i>Sardina pilchardus</i> , CN code 03035310)	Price (EUR/kg)	0,80	0,81 (-1%)	0,99 (-19%)	Between week 20/2020 and week 19/2023 prices showed a slight increasing trend. Prices fluctuated slightly between 0,64 EUR/kg (week 51/2022) to 1,39 EUR/kg (week 28/2022). 50% of the weekly prices were between than 0,60 EUR/kg and 0,80 EUR/kg.
	Volume (tonnes)	776	522 (+49%)	502 (+55%)	Supply is seasonal and the highest peaks seem to occur most often between weeks 35 and 40, with the highest peak registered in week 39 of 2020. Volumes show high fluctuations ranging between 54 tonnes (week 51 of 2022) to 4.080 tonnes (week 39 of 2020). 49% of the weekly volumes were less than 700 tonnes.
Frozen mackerel from the Faroe Islands (<i>Scomber scombrus</i> , <i>Scomber japonicus</i> , CN code 03035410)	Price (EUR/kg)	1,84	1,94 (-5%)	1,86 (-1%)	Prices showed an upward trend in the period analysed ranging between 1,06 (week 34/2021), corresponding with the highest peak in supply, and 3,11 EUR/kg (week 05 of 2023). 77% of the weekly prices were between 1,50 and 2,00 EUR/kg.
	Volume (tonnes)	252	249 (+1%)	480 (-48%)	Very high fluctuations in supply from 18 tonnes (week 34 of 2020) to 4.442 tonnes (week 34 of 2021). Supply shows fluctuations and isolated high peaks but does not seem to follow a clear seasonality. 49% of the weekly supply were higher than 300 tonnes.

Figure 34. **IMPORT PRICE OF FROZEN FILLETS OF HERRING FROM NORWAY, 2020 - 2023**

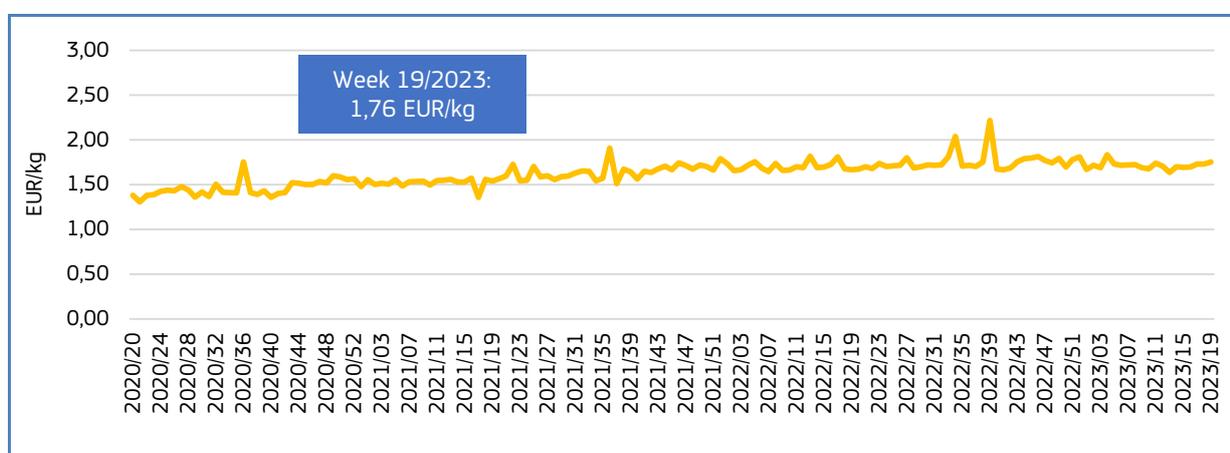


Figure 35. **IMPORT PRICE OF FROZEN SARDINES FROM MOROCCO, 2020 - 2023**

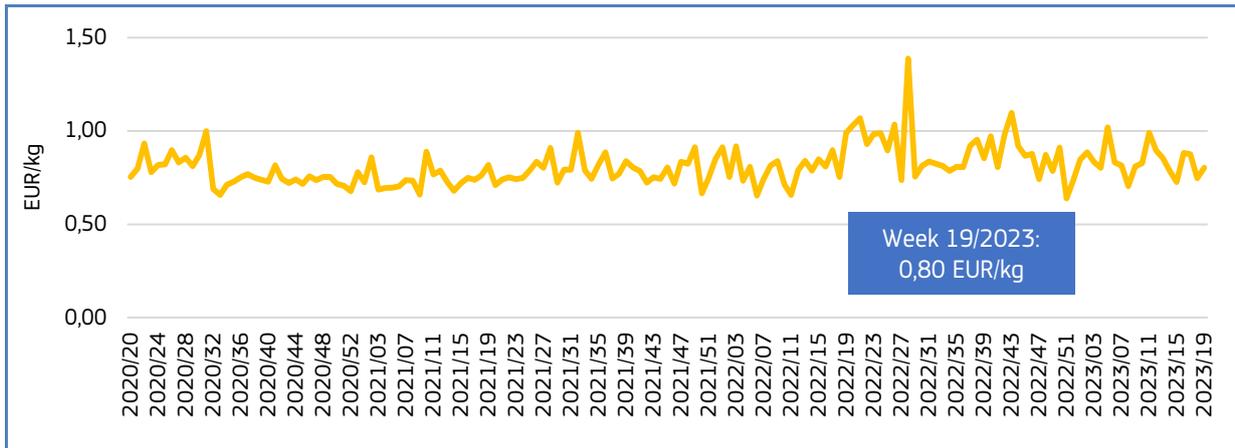
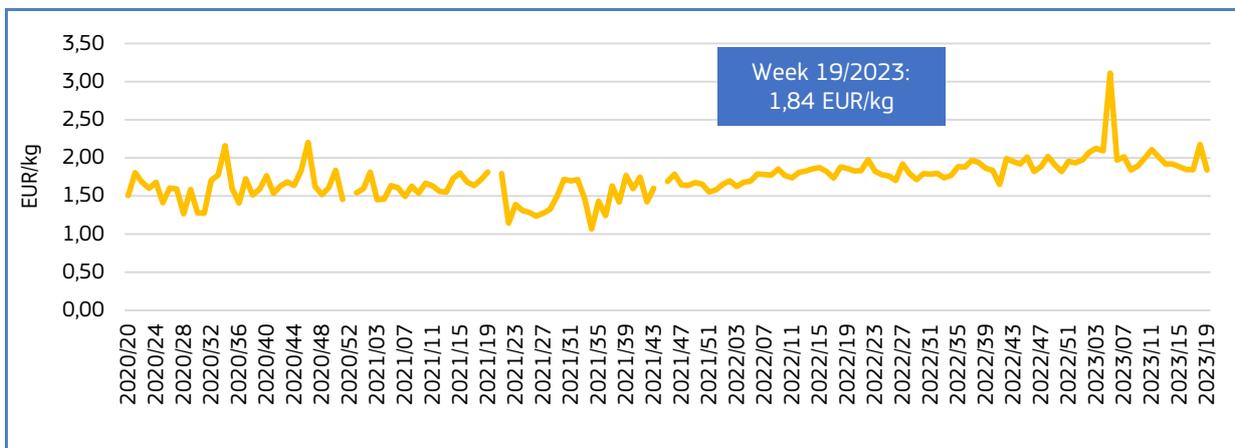


Figure 36. **IMPORT PRICE OF FROZEN MACKEREL FROM THE FAROE ISLANDS, 2020 - 2023**



Between week 01/2023 and week 19/2023, the price of frozen fillets of **herring** from **Norway** showed a slight upward trend. Price ranged from 1,64 to 1,83 EUR/kg, and volume highly fluctuated between 258 to 3.849 tonnes.

Between week 01 and week 19 of 2023, the price of frozen **sardines** from **Morocco** decreased. Price ranged from 0,70 to 1,02 EUR/kg, and supply strongly fluctuated between 121 kg and 776 tonnes.

In the first 19 weeks of 2023, the price of frozen **mackerel** from **the Faroe Islands** showed a downward trend as well as supply. Price ranged from 1,84 to 3,11 EUR/kg, and volume strongly fluctuated between 180 to 566 tonnes.

Table 21. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF EU IMPORTS OF THREE OTHER FISHERIES AND AQUACULTURE PRODUCTS RELEVANT TO THE EU APRKET**

Extra-EU Imports	Week 19/2023	Preceding 4-week average	Week 19/2022	Notes	
Prepared or preserved skipjack , whole or in pieces, in vegetable oil (excl. minced) from Ecuador (CN code 16041421)	Price (EUR/kg)	4,36	4,83 (-10%)	4,36 (0%)	Between weeks 20/2020 and 19/2023 prices showed strong fluctuations reaching the minimum value of 3,36 EUR/kg in week 07/2021, followed by an increasing trend until the maximum value of 5,68 EUR/kg in week 30/2022. Prices then decreased until the latest week analysed (19/2023). 43% of the weekly prices were between 3,50 EUR/kg and 4,00 EUR/kg.
	Volume (tonnes)	384	884 (-57%)	981 (-61%)	Supply fluctuated greatly ranging from 147 tonnes (week 07/2021) to 1.690 tonnes (week 23/ 2022). In 2022 the highest peaks were registered. 68% of the weekly supply was more than 600 tonnes
Frozen southern hake from Chile (<i>Merluccius australis</i> , CN code 03036613)	Price (EUR/kg)	7,78*	4,56 (+70%) **	6,01 (+30%) ***	In the period analysed prices fluctuated strongly between 3,48 EUR/kg (week 11/2022) and 7,78 EUR/kg (week 18/2023). 56% of the weekly prices were between 4,00 and 5,00 EUR/kg.
	Volume (tonnes)	85*	37 (+132%) **	78 (+9%) ***	Volumes showed high fluctuations ranging from 0,587 tonnes (week 46/2022) to 828 tonnes (week 44/2021). Supply shows strong fluctuations with the highest peaks occurring most often in weeks 38, and between weeks 41 and 44. 51% of the weekly supply was below 50 tonnes.
Frozen fillets of redfish from Iceland (<i>Sebastes marinus</i> , CN code 03048921)	Price (EUR/kg)	8,40	7,61 (+10%)	6,56 (+28%)	Between weeks 20/2020 and 19/2023 prices showed strong fluctuations ranging from 1,98 EUR/kg (week 01/2021) to 10,97 EUR/kg (week 40/2020). 89% of the weekly prices were below 8,00 EUR/kg.
	Volume (tonnes)	8	20 (-58%)	59 (-86%)	Highest peaks is supply seem to occur most often in week 8, 21 and between weeks 34 and 40. The highest peaks were registered in 2021. Volumes showed high fluctuations ranging from 0,060 tonnes (week 40/2020) to 103 tonnes (week 25/2021). 60% of the weekly supply was less than 30 tonnes

* Data refers to week 18/2023, the most recent data available. ** Data refers to weeks 14/16/17 of 2023. *** Data refers to week 18/2022.

Figure 37. **IMPORT PRICE OF PREPARED OR PRESERVED SKIPJACK FROM ECUADOR, 2020 - 2023**

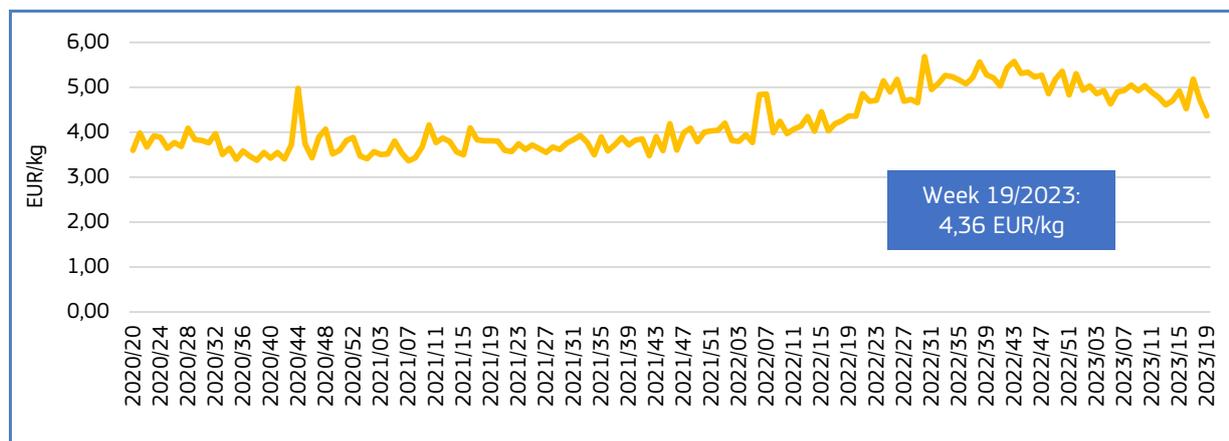


Figure 38. **IMPORT PRICE OF FROZEN SOUTHERN HAKE FROM CHILE, 2020 - 2023**

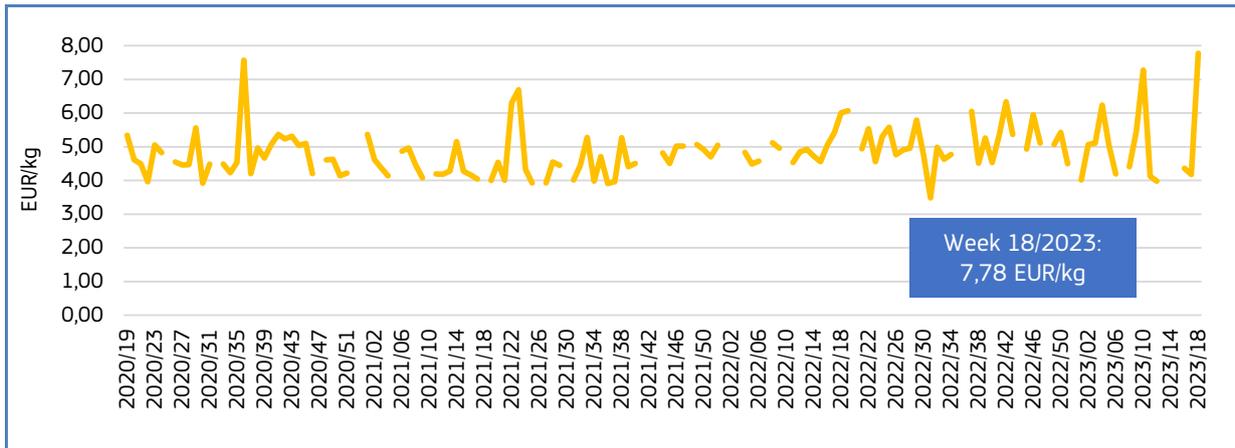
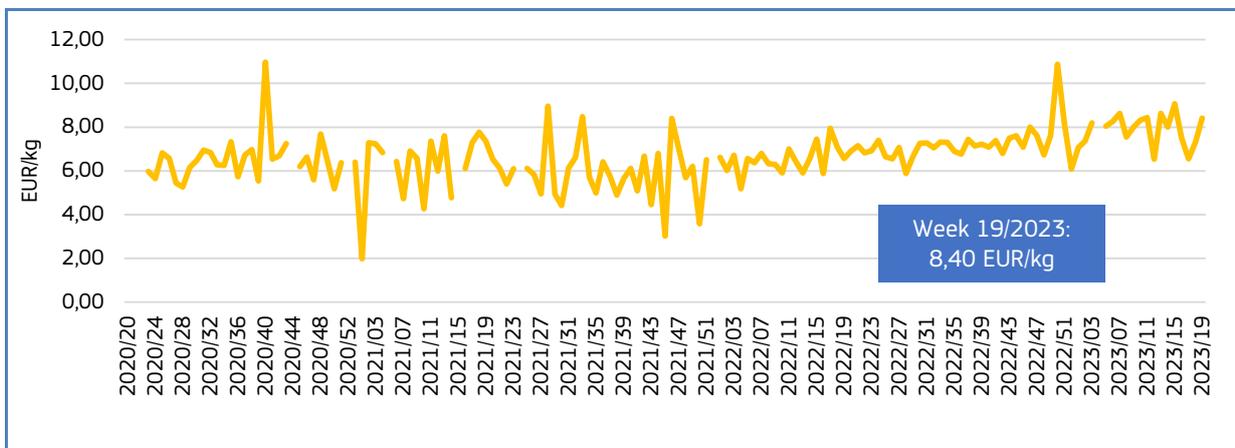


Figure 39. **IMPORT PRICE OF FROZEN FILLETS OF REDFISH FROM ICELAND, 2020 - 2023**



Since the beginning of the year, the price of prepared or preserved **skipjack** from **Ecuador** has been falling, fluctuating between 4,36 EUR/kg to 5,18 EUR/kg. At the same time, volume fluctuated greatly from 384 tonnes to 1.222 tonnes.

The price of frozen **hake** from **Chile** showed an increasing trend between weeks 01/2023 and 19/2023. The price ranged from 3,98 EUR/kg to 7,78 EUR/kg while weekly supply fluctuated greatly from 5 tonnes to 497 tonnes.

In 2023, the price of frozen fillets of **redfish** from **Iceland** has been increasing, fluctuating between 6,54 EUR/kg to 9,07 EUR/kg. At the same time, volume fluctuated greatly from 3 tonnes to 41 tonnes.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

Data analysed in the section “Consumption” are extracted from EUMOFA, as collected from Europanel²⁶.

In April 2023 compared with April 2022, household consumption of fresh fisheries and aquaculture products decreased in France, Germany, Hungary, Italy, the Netherlands, Portugal and Sweden in both volume and value, while in Poland and Spain volume decreased and value increased. In Ireland only volume decreased, while consumed value remained the same.

The main species responsible for the increase in value in Spain were hake (11% of volume and 19% of value) and gilthead seabream (8% of volume and 20% of value). In Poland changes were due to salmonids (-3% of volume and 27% of value) and mackerel (0% of volume and 6% of value). The highest decreases were detected in Sweden and Hungary. In Sweden the decrease was due to a lower consumption of salmon (-55% of volume and -39% of value), and flatfish (-57% of volume and -65% of value). In Hungary there were decreases of miscellaneous aquatic products (-44% of volume and -11% of value).

Table 22. **APRIL 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	April 2021		April 2022		March 2023		April 2023		Change from April 2022 to April 2023	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
France	32,56	20.906	259,35	15.974	213,44	15.710	214,84	15.043	205,77	6%	4%
Germany	12,81	7.529	116,61	6.048	100,03	5.196	93,86	5.133	97,52	15%	3%
Hungary	6,50	344	1,81	305	1,86	245	2,00	170	1,66	44%	11%
Ireland	21,22	1.201	18,13	1.056	16,90	1.343	21,71	960	16,97	9%	0%
Italy	29,99	25.332	269,07	21.346	241,86	23.471	294,88	18.090	222,57	15%	8%
Netherlands	20,70	2.689	46,81	2.494	49,92	2.612	53,66	2.224	48,05	11%	4%
Poland	13,33	3.937	27,29	3.563	27,10	4.005	33,98	3.397	31,94	5%	18%
Portugal	57,67	6.626	44,16	5.234	38,69	4.686	35,72	3.583	28,82	32%	25%
Spain	44,21	52.520	461,94	39.082	351,41	43.501	415,03	38.886	370,83	1%	6%
Sweden	23,99	910	11,78	802	11,40	483	8,10	467	8,11	42%	29%

*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 April has been above the annual average in both volume and value in Germany and Ireland. In Hungary, Italy, the Netherlands, Portugal, Spain and Sweden both volume and value were below the annual average. In France and Poland value was above the annual average whilst volume was below.

The most recent weekly consumption data (up to **week 26 of 2023**) are available on the EUMOFA website and can be accessed [here](#).

²⁶ Last update: 23.06.2023.

3.2. Clams

Habitat: Clams are shellfish that can be found in both freshwater and marine habitats. They spend most of their lives in shallow waters partially buried in the sand of the ocean floor²⁷.

Catch area: Mediterranean Sea (the coast of Spain and Italy); North-East Atlantic Ocean (the coast of the United Kingdom, France, Spain and Portugal)²⁸.

Production method: Caught and farmed.

Producing countries in the EU: Italy, France, Ireland, the Netherlands.

Main consumers in the EU: Italy, France, Spain, Portugal.

Presentation: Shelled or unshelled.

Preservation: Live, fresh, chilled, frozen, natural or pickled, frozen in sauces, canned, as salads and ready meals.

Means of preparation: Mostly cooked, baked stuffed; served with pasta (in Italy).



3.2.1. Overview of household consumption in Italy and Portugal

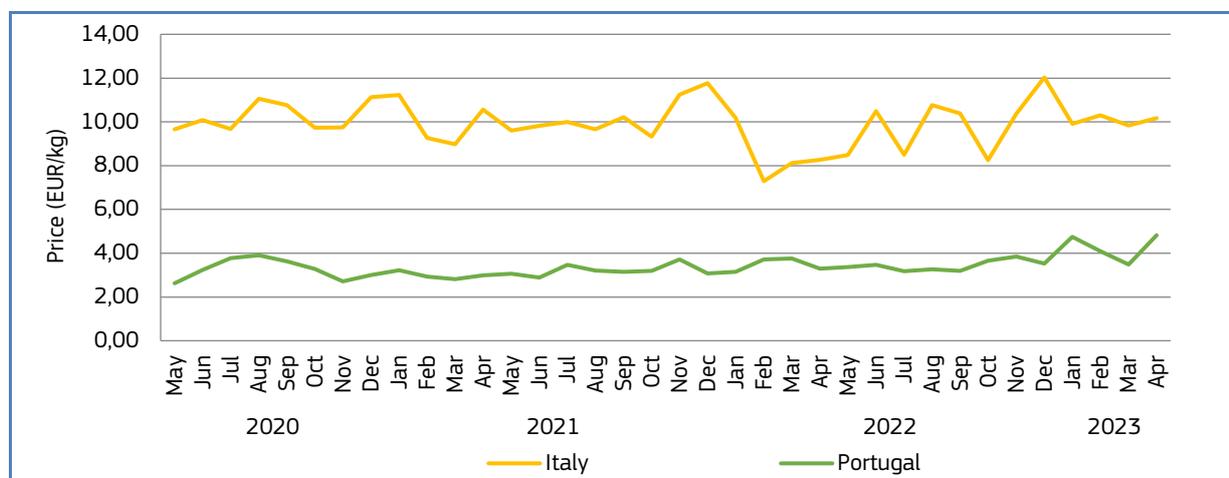
The per capita apparent consumption of fish and seafood products in Italy and Portugal is above the EU average of 23,28 kg. In 2020, Portugal registered the highest consumption within the EU with 57,67 kg, while Italy was in 5th position, after Spain, Denmark and France, with 29,99 kg 29% more than the EU average consumption. However, Italy's consumption still remains 47% lower than per capita consumption in Portugal. See more on EU per capita consumption in Table 22.

Over the past three years, Italy's household consumption of fresh clam was on average 990 tonnes, more than five times higher than that in Portugal with 190 tonnes. Italian consumers also spent almost three times more for a kg of fresh clam: 9,91 EUR/kg on average, compared to consumers in Portugal, who spend on average 3,40 EUR/kg. In April 2023 the price for a kg of clam was 23% higher in Italy, and 47% higher in Portugal compared to the same period last year.

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

Consumption: Italy MH 6 2020, MH 3 2018, MH 10 2016; Portugal MH 6 2020, MH 3 2018, MH 10 2016.

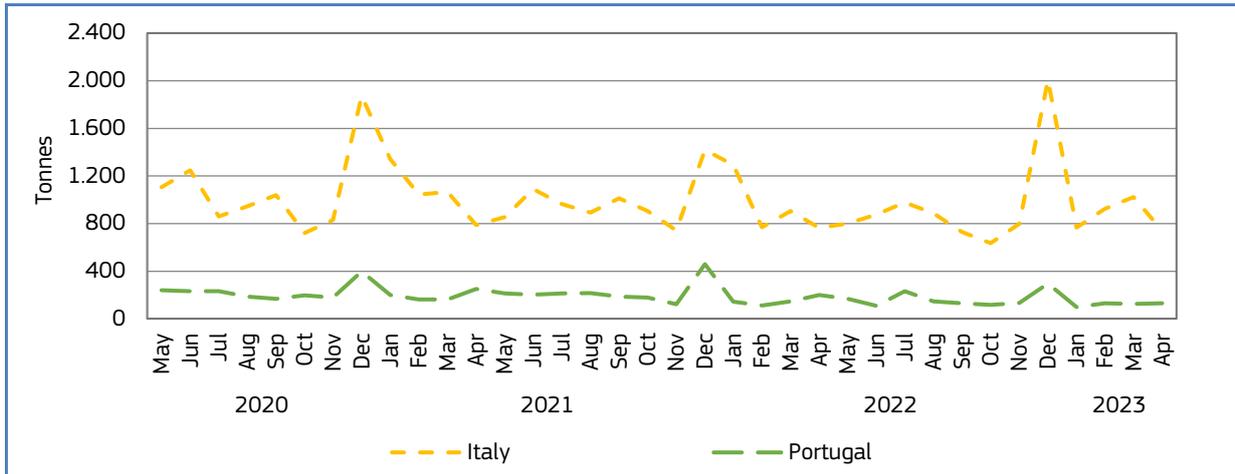
Figure 40. **PRICES OF CLAMS PURCHASED BY ITALIAN AND PORTUGUESE HOUSEHOLDS**



²⁷ <https://www.britannica.com/animal/clam>

²⁸ <https://www.eumofa.eu/documents/20178/114144/MH+3+2018.pdf>

Figure 41. **HOUSEHOLD PURCHASES OF CLAMS IN ITALY AND PORTUGAL**



3.2.2. Household consumption trends in Italy

Long-term trend (May 2020 to April 2023): Fluctuating volume and price with seasonal peaks in December.

Yearly average price: 9,70 EUR/kg (2020), 10,14 EUR/kg (2021), 9,43 EUR/kg (2022).

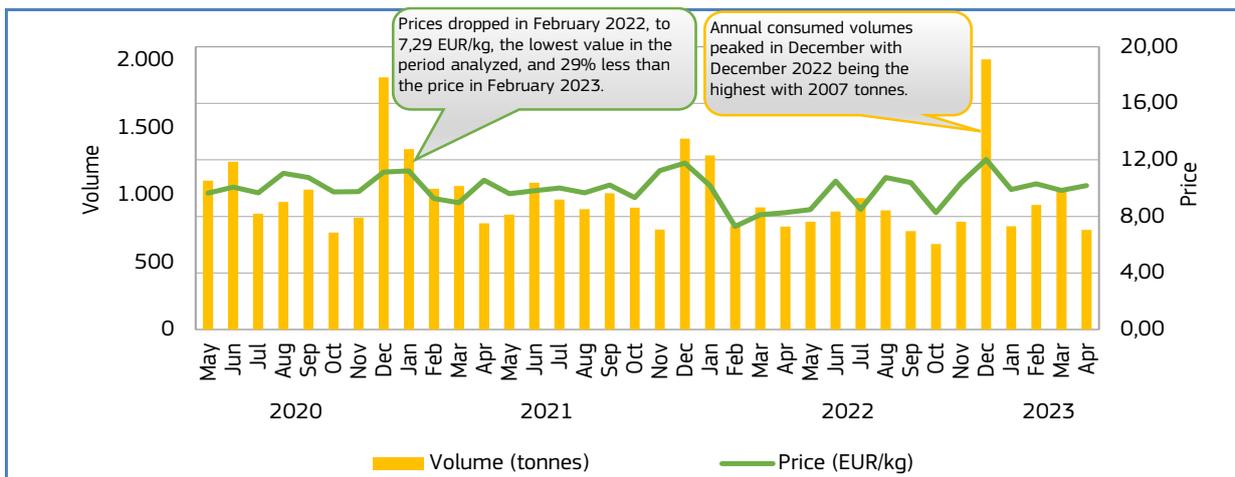
Yearly consumption: 12.454 tonnes (2020), 12.116 tonnes (2021), 11.444 tonnes (2022).

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

Price: 10,17 EUR/kg.

Consumption: 740 tonnes.

Figure 42. **RETAIL PRICE AND VOLUME OF CLAMS PURCHASED BY HOUSEHOLDS IN ITALY, MAY 2020 – APRIL 2023**



3.2.3. Household consumption trends in Portugal

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

Yearly average price: 3,20 EUR/kg (2020), 3,15 EUR/kg (2021), 3,46 EUR/kg (2022).

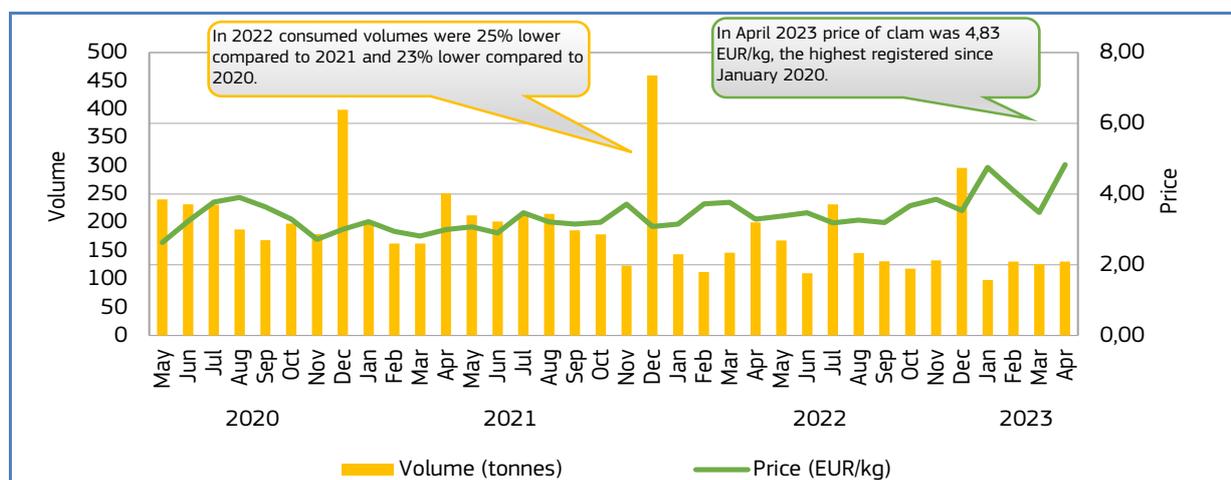
Yearly consumption: 2.515 tonnes (2020), 2.565 tonnes (2021), 1.936 tonnes (2022).

Short-term trend (January to April 2023): Fluctuating volumes and slight increase in prices.

Price: 4,83 EUR/kg.

Consumption: 131 tonnes.

Figure 43. **RETAIL PRICE AND VOLUME OF FRESH CLAMS PURCHASED BY HOUSEHOLDS IN PORTUGAL APRIL 2020 – APRIL 2023**



4. Case study: Fisheries and aquaculture in Hungary

Hungary is a landlocked country located in Central Europe. It lies approximately between latitudes 45° and 49° N and longitudes 16° and 23° E. Hungary shares a border to the north with Slovakia, to the northeast with Ukraine, to the east with Romania, to the south with Serbia and Croatia, to the southwest with Slovenia, and to the west with Austria²⁹.

As a landlocked country, Hungary does not have any marine fishery or mariculture production. Commercial inland fishery has been banned since 2016 due to its decreasing importance and the increasing interest of recreational fishers³⁰. However, selective fishing for ecological purposes and traditional ways of fishing with specific gears are still allowed³¹.



Source: CIA, the world factbook

The most extensive fish production method in Hungary is pond fish production with common carp the predominant species. The environmental and climatic conditions of Hungary favour this species. 83,2% of fish farmed for human consumption is made up of common carp, 6,8% is bighead and silver carps, 3,4% grass carp, 1,6% European catfish and the remaining 5% is made up of other species that are produced in fish pond systems³².

4.1. Aquaculture production in Hungary³³

In 2020, aquaculture production of the EU-27 was 1,1 million tonnes, of which 294.000 tonnes (22%) were produced in freshwater. The highest volumes of freshwater fish were produced in Poland (16%, 48.000 tonnes), France (14%, 41.000 tonnes) and Italy (12%, 37.000 tonnes). Hungary was the 7th largest freshwater fish producer with 18.000 tonnes of production, accounting for 6% of freshwater fish production of the EU-27.

Most produced freshwater fish species of the EU-27 in volume were salmonid species (180.300 tonnes, 61% of freshwater fish production), more specifically rainbow trout (95%). In 2020 those countries with the highest production in volume were France (36.700 tonnes), Italy (33.200 tonnes) and Denmark (32.800 tonnes). Hungary with 95 tonnes was the 20th among the EU-27 MS.

The most produced fish species of Hungary was common carp, with 72.500 tonnes in 2020, accounting for about a quarter of the total volume and value of EU freshwater fish production. Carp was the second most produced freshwater fish species in the EU. Most common carp of table size³⁴ was produced in Poland (25.500 tonnes), Czechia (17.300 tonnes) and Hungary (11.900 tonnes).

The second most produced freshwater fish in Hungary was African catfish. In 2020, African catfish production of table size³⁵ fish in the EU reached 9.600 tonnes, making up 3% of the volume and 2% of the value of total freshwater fish production. Hungary, with a production of 3.800 tonnes, was in first place in the EU, followed by the Netherlands (2.700 tonnes) and Germany (1.000 tonnes).

Even though the fishery and aquaculture sector of Hungary is rather small, a number of different supply and service sectors are built on it. A major part of recreational fishing, a number of environment and nature protection programmes and their economic and sociological productions are established on the basis of it, and the sector is trying to adjust to new challenges and customer demands. In 2021, 26.856 tonnes of fish were produced in aquaculture in Hungary, 21.184

²⁹ <https://www.cia.gov/the-world-factbook/countries/hungary/>

³⁰ Hhvtv. 74. § (8): <https://www.parlament.hu/irom40/03785/03785.pdf>

³¹ <https://halaszat.kormany.hu/>

³² http://new.magyarhal.hu/UserFiles/files/jelentesek/Feh%C3%A9r%20k%C3%B6nyv%202021_v%C3%A9gleges.pdf

³³ http://new.magyarhal.hu/UserFiles/files/jelentesek/Feh%C3%A9r%20k%C3%B6nyv%202021_v%C3%A9gleges.pdf

³⁴ Table fish is produced for human consumption with a preferred size for customers. Table size carp in Hungary is 2-3 kg.

³⁵ Table size African catfish is 1-1,5 kg.

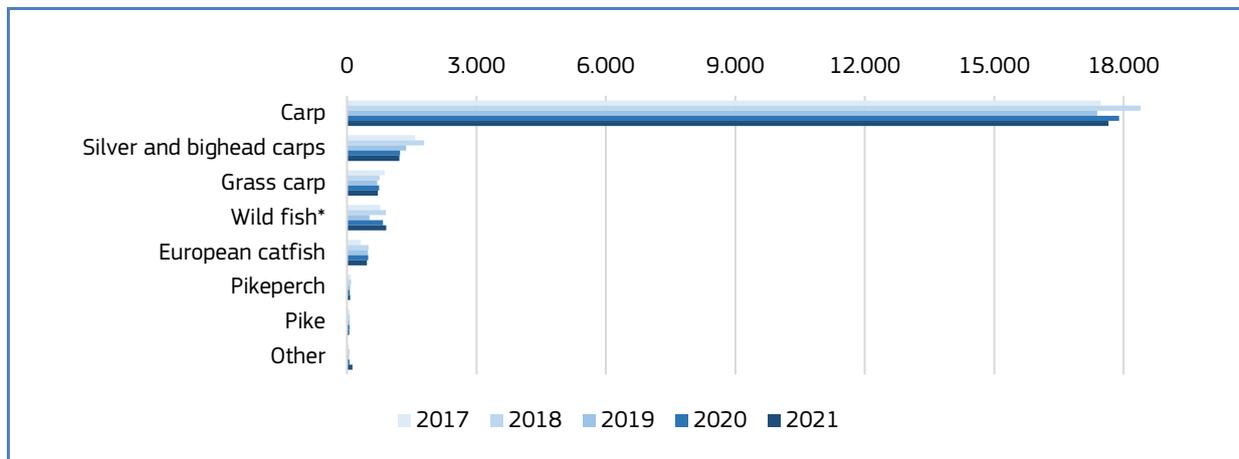
tonnes of which were produced in pond culture at a value of 53,34 million EUR, and 5.672 tonnes in intensive culture systems at a value of 15,36 million EUR.

In 2021, the most produced fish species of Hungary was carp, which made up 66% of total fish production and 83% of pond fish production. In value terms it accounted for 66% of the total value of fish production and 85% of the value of pond fish production.

Table fish production in 2021 made up 51 million EUR (15,9% increase from 2020), while the gross added value was 22,9 million EUR (15,6% increase from 2020). The production value of the fishery sector of Hungary has been growing continuously during the last few years. In 2021 it reached almost 2% of the animal production sector, and made up 0,6% of agriculture production, similar to previous years. In 2021, the total amount of table fish was 17.956 tonnes (67% of total production), which was 3% lower than in the previous year. Most of it was produced in pond culture (76%), while 24% was produced in intensive culture systems. Generally, the amount of aquaculture production remained at the same level as 2020, whilst production in intensive systems shows an increasing trend, and pond production is fluctuating slightly. From 2020 to 2021 pond fish production increased by 1%, while the increase was 7% in intensive systems.

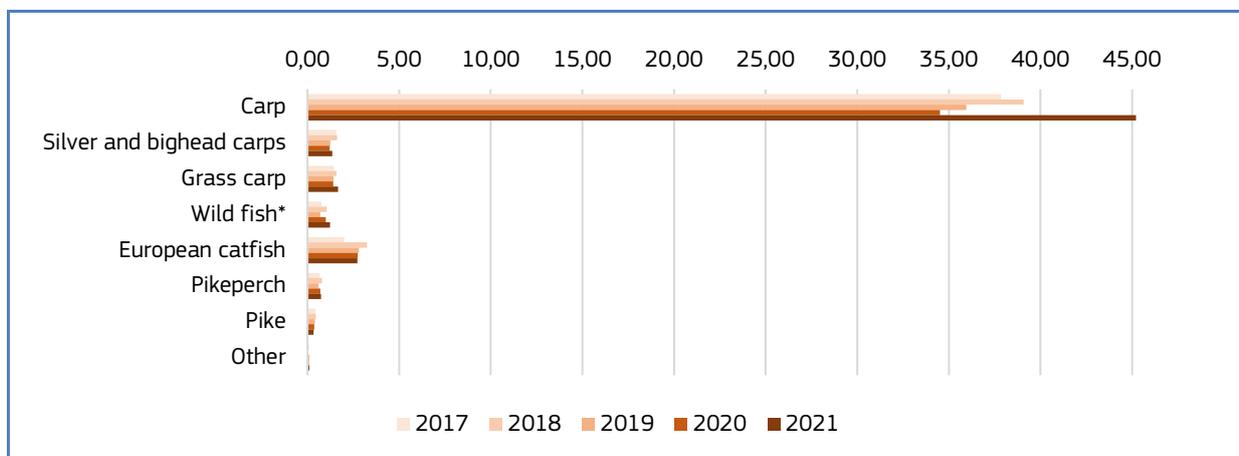
The size of the sector is small when compared to other agriculture sectors, and it has been using approximately the same size of pond farming area and producing the same volume of fish for years.

Figure 44. **MOST IMPORTANT FISH SPECIES PRODUCED IN POND SYSTEMS IN HUNGARY BY VOLUME (in tonnes)**



*Wild fish are fish that are not stocked into a pond but naturally appear there, e.g. when the pond is filled with water.
Source: AKI Institute of Agricultural Economics, 2023

Figure 45. **MOST IMPORTANT FISH SPECIES PRODUCED IN POND SYSTEMS IN HUNGARY BY VALUE (in million EUR)**



*Wild fish are fish that are not stocked into a pond but naturally appear there, e.g. when the pond is filled with water.
Source: AKI Institute of Agricultural Economics, 2023

The most important fish to be produced in intensive culture systems in Hungary was African catfish. . In 2021 it made up 93% of intensive fish production (85,0% of value) and 20% of total fish production (19% of total value of fish production). This was a 9% increase in volume and a 12% in value compared to 2020.

Figure 46. **MOST IMPORTANT FISH SPECIES PRODUCED IN INTENSIVE SYSTEMS IN HUNGARY BY VOLUME (in tonnes)**

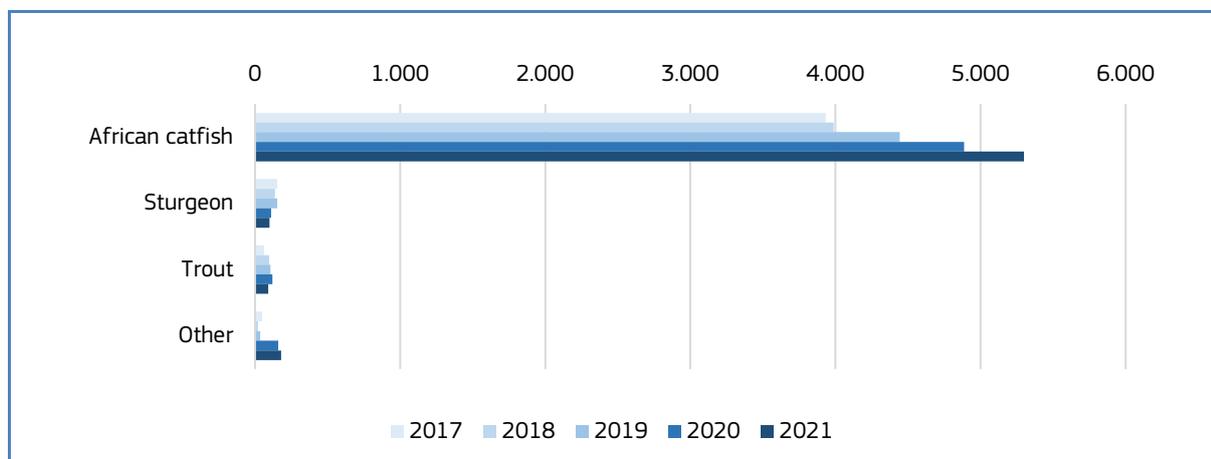
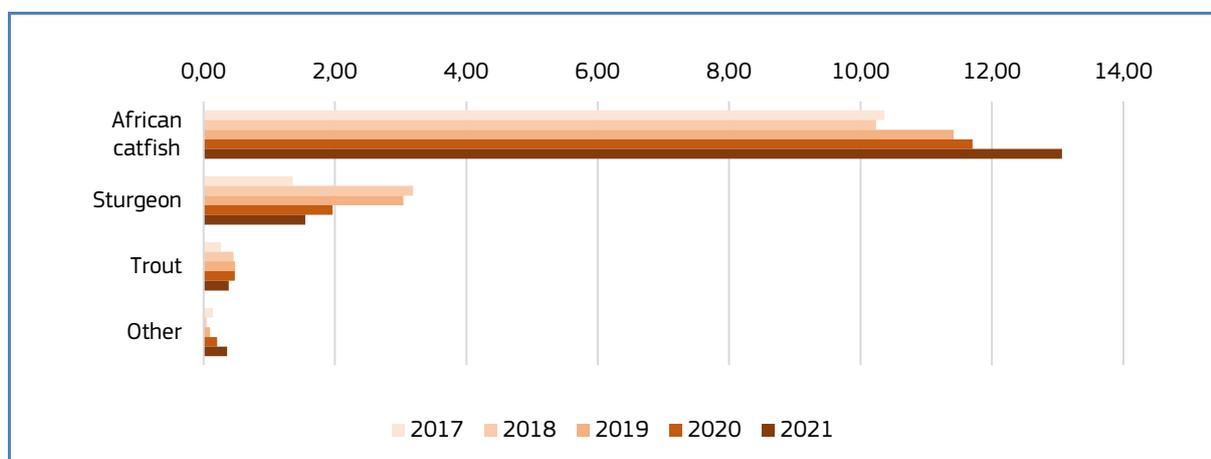


Figure 47. **MOST IMPORTANT FISH SPECIES PRODUCED IN INTENSIVE SYSTEMS IN HUNGARY BY VALUE (in million EUR)**



Source: AKI Institute of Agricultural Economics, 2023

4.2. International trade

Hungary is a net importer of seafood products, in both volume and value, except for live fish.³⁶ In 2022, the export volume of live fish was 3.799 tonnes at a value of 10,6 million EUR, which was a 17,4% decrease in volume and a 1,9% increase in value compared to 2021. The volume of imports in 2022 was 256 tonnes (a 31,2% decrease compared to the previous year) at a value of 0,92 million EUR (a 23,3% decrease compared to 2021).

³⁶ Live fish in case of Hungary includes live carp; live fish (excl. ornamental fish, trout [*Salmo trutta*, *Oncorhynchus mykiss*, *Oncorhynchus clarki*, *Oncorhynchus aguabonita*, *Oncorhynchus gilae*, *Oncorhynchus apache* and *Oncorhynchus chrysogaster*], eels [*Anguilla* spp.], carp [*Cyprinus* spp., *Carassius* spp., *Ctenopharyngodon idellus*, *Hypophthalmichthys* spp., *Cirrhinus* spp., *Mylopharyngodon piceus*, *Catla catla*, *Labeo* spp., *Osteochilus hasselti*, *Leptobarbus hoeveni*, *Megalobrama* spp.], Atlantic and Pacific bluefin tuna [*Thunnus thynnus*, *Thunnus orientalis*] and southern bluefin tuna [*Thunnus maccoyii*]); and live ornamental freshwater fish.

In 2022 the export ratio of fish and fish products to the value of the agriculture and food industry was 0,2%, while the ratio of imports was 1,4%. Compared to 2021, no changes were observed in the ratio of export value, while the ratio of import value decreased by 0,6%.

Export

In 2022 the export value of fish products from Hungary was 23 million EUR with a volume of 5.499 tonnes. Compared to 2021, this was a 9% decrease in volume and a 20% increase in value. Compared to 2017, when both export volume and value were highest, this was a 41% decrease in terms of volume and a 25% decrease in terms of value.

In 2022 live fish accounted for 78,3% of the export volume and 67% of the export value from Hungary to partner countries (69,1% of the total volume of exports with a value of 46,2%). Of this 57,3% comprised carp, prepared or preserved fish, caviar and caviar substitutes prepared from fish eggs (9,1% of volume with 15,9% of value), and crustaceans, molluscs and other aquatic invertebrates, prepared or preserved (0,1% volume with 4,0% of value).

In 2022 89% of export volumes and 86% of the total value of exports from Hungary went to the EU. Most exports from Hungary went to Romania (44%), Croatia (10%), and Poland (7%).

Live fish is the most important export product of the Hungarian fish sector. The export value of this category has been the highest in the last years and it is the only export group where Hungary is among net exporters. The volume of live fish in 2021 was 4.629 tonnes, which was 1.362 tonnes less than in 2020. The volume of imported live fish was 372 tonnes, 12% less than in 2020. An important share of exports was carp (2.265 tonnes) while in previous years the volume of other live fish was also significant. In 2021 it was 449 tonnes, only 5% more than in 2020. Species mentioned under "other live fish" are grass carp, silver and bighead carps, European catfish and breams.

In 2022 the main international market of Hungary was Romania receiving 57% (2.164 tonnes) of exported live fish. Croatia, Poland and Slovakia also received smaller amounts.

Table 23. **TOTAL EXPORTS FROM HUNGARY TO MAIN PARTNER COUNTRIES IN VALUE AND VOLUME (value in million EUR, volume in 1.000 tonnes)**

Country	2017		2018		2019		2020		2021		2022	
	Volume	Value										
Austria	426	1,51	548	1,80	231	1,13	347	1,22	218	1,12	406	2,58
Croatia	330	0,82	213	0,60	454	1,10	791	1,64	321	1,20	537	2,11
Czechia	1.014	2,09	382	0,76	65	0,07	94	0,13	35	0,07	51	0,21
France	645	4,76	788	4,89	155	1,25	54	0,64	46	0,60	40	0,78
Germany	1.082	2,87	992	2,92	614	1,98	622	1,69	338	1,85	202	1,16
Italy	315	0,65	335	0,75	140	0,28	209	0,42	131	0,31	101	0,28
Poland	1.071	2,61	776	2,73	155	0,21	137	0,17	410	0,82	392	1,02
Romania	2.737	9,36	2.710	8,85	2.816	6,49	3.603	6,85	3.365	7,47	2.421	7,17
Slovakia	554	1,42	760	1,89	364	1,31	421	1,12	502	1,87	443	2,35
Serbia	303	0,62	64	0,14	402	0,82	192	0,56	83	0,48	314	1,57
Other	879	3,95	1.024	4,08	738	3,42	568	2,73	612	3,45	592	3,81
Total	9.355	30,68	8.593	29,41	6.135	18,07	7.039	17,18	6.062	19,24	5.499	23,05

Source: AKI Institute of Agricultural Economics, 2023

Import

In 2022, Hungary imported 30.231 tonnes of fishery and aquaculture products at a value of EUR 140 million. Compared to 2021, the volume of imports was relatively stable with a 19% increase in value. Compared to 2018, when Hungary had the highest volume of imports, this was a decrease of 6% in volume while value still increased by 24%.

Most imports of fishery and aquaculture products to Hungary in 2022 came from Poland (17%), Germany (15%), Slovakia (12%), Spain (11%), the Netherlands (5%) and Austria (6%). When imports from EU MS only are considered, the ratio changes to 17% from Poland, 14% from Germany, 13% from Slovakia, 12% from Spain, 6% from the Netherlands and 7% from Austria. 94% of the volume of imported FAPs arrived in Hungary from EU countries, which provided 95% of the total import value of FAPs in 2022.

In 2022, catfish "*Pangasius* spp., *Silurus* spp., *Clarias* spp., *Ictalurus* spp." (43% volume, 36% value), sardines, prepared or preserved, whole or in pieces (excl. minced sardines and sardines in olive oil) (26% volume, 29% value), prepared or preserved skipjack, whole or in pieces, in vegetable oil (excl. minced) (7% volume, 10% value), frozen Cape hake "shallow-water hake" "*Merluccius capensis*" and deepwater hake "deepwater Cape hake" "*Merluccius paradoxus*" (7% volume, 5% value), and frozen fillets of Alaska pollack "*Theragra chalcogramma*" (6% volume, 4,7% value) accounted for 89% of the volume of the extra-EU imports to Hungary, while in value it was 84%.

Table 24. **TOTAL IMPORTS FROM MAIN PARTNER COUNTRIES TO HUNGARY IN VALUE AND VOLUME (value in million EUR, volume in 1.000 tonnes)**

Country	2017		2018		2019		2020		2021		2022	
	Volume	Value										
Austria	1.008	3,98	1.011	4,08	620	3,02	1.045	2,75	2.155	5,08	1.911	6,14
China	1.013	1,96	995	2,16	683	1,74	451	1,13	206	0,47	129	0,50
Czechia	2.689	12,49	2.751	12,14	2.245	10,44	1.896	10,38	1.893	10,30	1.882	11,86
Germany	3.679	14,34	4.135	15,95	3.896	15,86	4.070	16,76	3.791	17,04	4.117	21,67
Denmark	1.208	4,82	1.011	4,65	891	3,96	673	3,05	812	3,96	813	5,62
Spain	2.758	6,73	2.685	6,99	2.957	9,68	2.998	9,45	2.999	9,67	3.252	10,34
France	545	3,95	653	4,56	631	4,26	595	3,86	593	4,07	665	4,61
Croatia	489	1,66	616	2,76	683	2,96	680	2,58	717	2,37	784	2,70
Italy	1.874	9,69	2.592	12,54	2.815	13,69	2.372	12,36	1.733	12,67	1.733	13,65
Netherland	1.672	9,25	1.544	8,30	1.342	7,23	996	5,20	1.443	7,35	1.554	9,85
Poland	5.333	15,40	5.798	17,36	5.787	19,38	5.356	18,91	4.893	17,04	4.809	18,65
Romania	380	1,37	335	0,67	598	1,12	73	0,24	338	1,82	395	2,64
Slovenia	598	1,24	743	1,61	489	1,30	643	2,98	1.018	4,22	1.075	4,47
Slovakia	3.423	4,62	3.523	5,53	3.069	5,10	3.563	5,63	3.473	6,74	3.513	9,11
Vietnam	844	1,10	702	1,24	286	0,46	541	1,02	674	1,70	363	1,16
Other	2.422	10,11	3.097	12,38	2.743	11,53	3.240	13,37	3.148	13,64	3.238	16,98
Total	29.933	102,71	32.193	112,93	29.736	111,73	29.192	109,67	29.884	118,12	30.231	139,97

Source: AKI Institute of Agricultural Economics, 2023

4.3. Consumption

In 2021 per capita fish consumption in Hungary was 6,52 kg LWE, a 2% increase compared to 2020. Based on FAO data³⁷, average global per capita consumption was 20,2 kg in 2020, meaning that per capita fish consumption in Hungary did not even reach one third of the world average. At the same time, according to EUMOFA data³⁸, apparent per capita consumption of EU-27 MS reached 23,3 kg in 2020. This highlights even further the low level of fish consumption in Hungary³⁹.

Of the fisheries products consumed in Hungary in 2021, live, fresh or chilled products accounted for 27%, frozen products 32% and preserved or canned products 41%. As for domestic consumption, imports are of high importance, as their share of the amount consumed was 78,6% in the same year. This was a 2% increase when compared to the previous year, so the population of Hungary consumed 2% more imported fish than a year earlier.⁴⁰

Hungary has four special quality species registered with Geographical Indications: “Akasztói szkiponty” (carp) is registered as Protected Designation of Origin (PDO), while “Szilvászváradai pisztráng” (brown trout) as Protected Geographical Indication (PGI), as well as “Szegedi tükörponty” (mirror carp), and “Balatoni hal” (carp and pike-perch)⁴¹.

In general, besides fish produced for human consumption in Hungary, there was still a significant need for imported fish as well, mainly for processed and ready-to-cook fish products. An important goal would be to increase the amount of domestically produced fish for human consumption. Many different programmes, such as the marketing programme of the Hungarian Fisheries Operational Programme (MAHOP) “Get it!”⁴², or the “Fish Friday” programme of the Hungarian Aquaculture and Fisheries Inter-Branch Organisation (MA-HAL), together with other events and fish cooking competitions encourage the public to consume fish. It would also be essential to develop fish processing and expand the varieties of processed products, improve product quality and traceability, and strengthen consumer confidence. Climate change increasingly affects fish production as well. Droughts of the last years had a serious negative impact on production conditions of pond farms, resulting in lower production yields in some regions, as well as less available domestically produced fish for human consumption⁴³.

³⁷ <https://www.fao.org/3/cc0461en/cc0461en.pdf>

³⁸ https://www.eumofa.eu/documents/20178/521182/EFM2022_EN.pdf/5dbc9b7d-b87c-a897-5a3f-723b369fab08?t=1669215787975

³⁹ http://new.magyarhal.hu/UserFiles/files/jelentesek/Feh%3%A9%20k%3%B6nyv%202021_v%3%A9gleges.pdf

⁴⁰ http://new.magyarhal.hu/UserFiles/files/jelentesek/Feh%3%A9%20k%3%B6nyv%202021_v%3%A9gleges.pdf

⁴¹ https://www.eumofa.eu/documents/20178/477018/EN_The+EU+fish+market_2021.pdf

⁴² <https://kajra.hu/>

⁴³ http://new.magyarhal.hu/UserFiles/files/jelentesek/Feh%3%A9%20k%3%B6nyv%202021_v%3%A9gleges.pdf

5. Case study: Pollack in the EU

Given its distribution in rocky habitats and its solitary lifestyle, there is no major industrial pollack fishery in the EU. In 2021, EU-27 catches of pollack reached 3,234 tonnes, France and Ireland being the main landing countries. However, between 2012 and 2021, pollack fisheries declined sharply in terms of catches⁴⁴ (-23%) and landings⁴⁵ (-54%) in the EU-27. In 2022, EU-27 imported 1,584 tonnes of pollack at a value of EUR 8 million, mostly fresh or chilled, from Norway and the UK.

5.1. Biology resource and exploitation

Biology

Pollack (*pollachius pollachius*) is a marine fish of the Gadidae family, like cod, whiting and haddock. It is green-brown in colour with reflections of bronze and gold. Pollack can be confused with saithe but differs in that its lateral line is darker and curved at the level of the pectoral fins. It can be found in the North-East Atlantic, from Norway and Iceland to the Bay of Biscay. This species is a fast-growing groundfish found on hard bottoms at depths of up to 200 m. It can live for up to eight years and reach 1,30 m⁴⁶. The habitat changes according to life stage. The juvenile stage lasts three years. During this stage, pollack are pelagic and live near the coast. Afterwards, the adults migrate to the open sea and are found around rocky areas at depths of 40-100 m. The reproductive period depends partly on water temperature and is during March in the Bay of Biscay, in February along the coasts of Spain, and in May in Norwegian waters, mostly at depths of 100 m.



Source: Scandinavian Fishing Yearbook

There are few fisheries directed towards pollack and it is mainly captured as bycatch in various fisheries (cod, herring, haddock, northern prawn and saithe), including small-scale fisheries in coastal waters. Pollack is also one of the species most targeted by recreational fisheries on the Atlantic coast. It can be caught with static gears such as gillnets, longlines, handlines and jiggers on rocky ground and wrecks, but also with otter trawls (even if is more complicated on rocky bottoms)⁴⁷. In 2021, the main EU fishing nations were France, Ireland and Spain.

Resource, exploitation and management in the EU

Pollack is found in the North-East Atlantic⁴⁸. It is exploited by European fleets, as well as by the United Kingdom and Norway⁴⁹. Even though pollack can be caught all year round, the highest catch period for this species is during winter. On average, over the years 2019 and 2020, 31% of catches were made by drift and/or fixed nets (more specifically static nets), 30% by demersal trawlers and/or demersal seiners (otter trawls are most commonly used), and 21% of the catches were made by vessels using hooks⁵⁰. This species is generally marketed fresh or chilled, but also frozen. Pollack is subject to fisheries management measures. It is managed by a total allowable catch (TAC). EU Regulation 2015/812 sets for this species a minimum conservation reference size (MCRS) of 30 cm⁵¹. Even though total allowable catches have been introduced in European waters, landings are well below the TACs imposed. This is particularly the case in Subarea 7⁵².

⁴⁴ Products caught by fishing vessels of the EU Member States

⁴⁵ Landings of fishery products in the ports of the European Economic Area (EEA) member countries

⁴⁶ <http://www.fao.org/fishery/species/2232/en>

⁴⁷ ICES

⁴⁸ [Pollachius pollachius \(europa.eu\)](http://pollachius.pollachius.europa.eu)

⁴⁹ ICES

⁵⁰ STECF

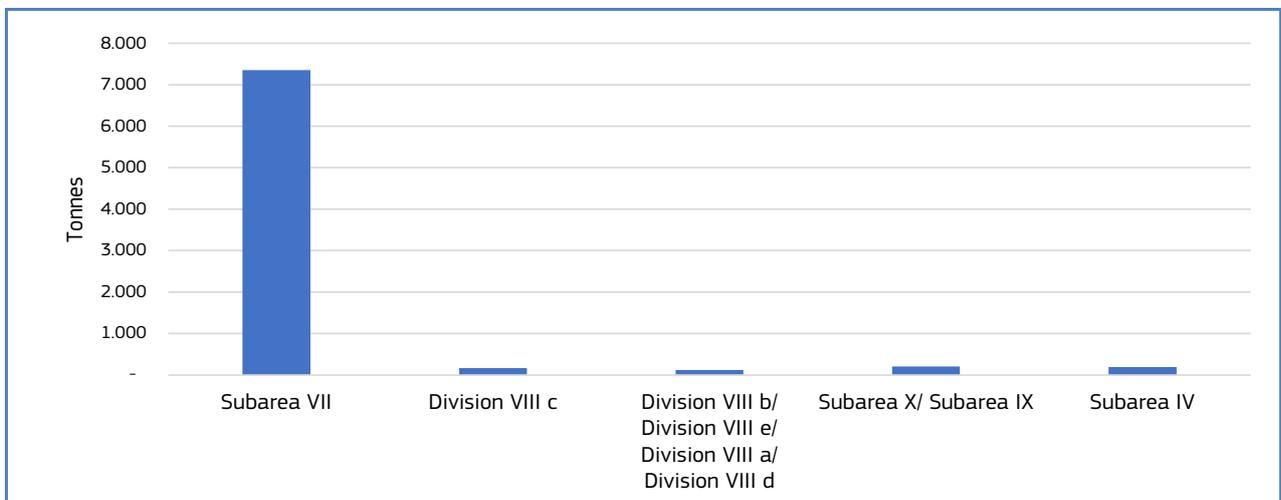
⁵¹ [Pollachius pollachius \(europa.eu\)](http://pollachius.pollachius.europa.eu)

⁵² Subarea 7 extends from the south of the Celtic Sea to the English Channel

However, no TAC has been defined for the North Sea, Skagerrak and Kattegat stock zones (i.e., Division III). In addition, regulations exist for the minimum mesh size to be used for targeted fishing for pollack in certain areas of the North-East Atlantic: 110 mm in divisions 7.d and 7.e, and 80 mm in sub-area 9 and division 8.c. In the Celtic Sea, Channel and West of Scotland area, there is no joint management plan between the EU and the UK for this shared stock⁵³.

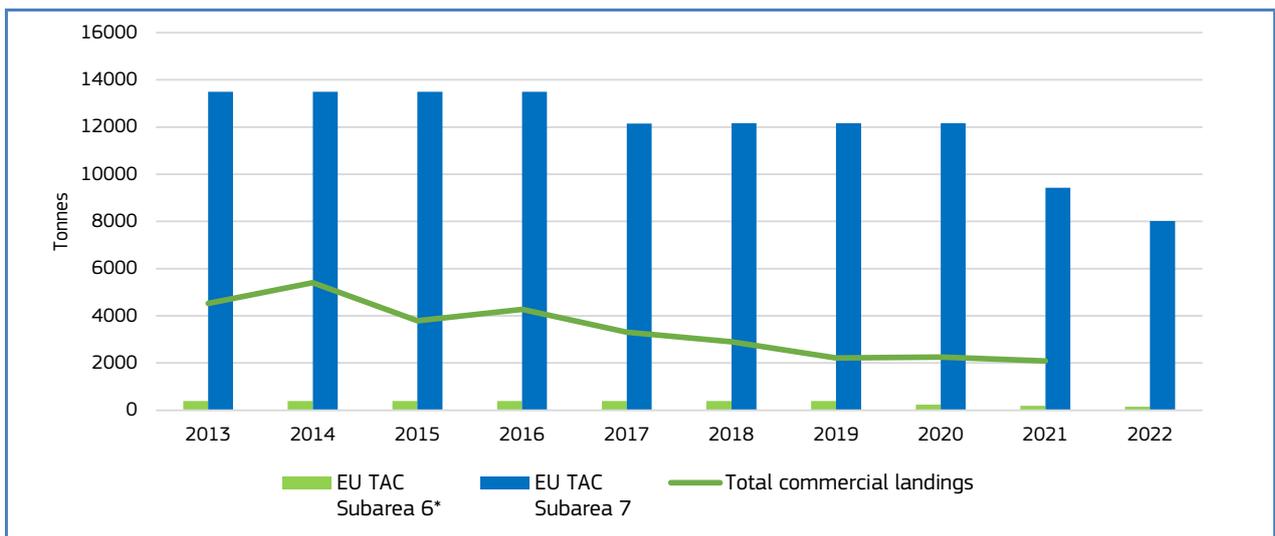
The stock in the Celtic Sea, English Channel and West of Scotland is considered restorable or as being restored, while the stocks in the Bay of Biscay, on the Iberian coast, in the North Sea, Skagerrak and Kattegat are not classified; their status is unknown, but commercial catches appear to have been fairly stable since the early 2000s⁵⁴.

Figure 48. **TOTAL ALLOWABLE CATCH OF POLLACK IN 2021**



Source: European Commission

Figure 49. **TOTAL ALLOWABLE CATCH OF POLLACK IN THE CELTIC SEAS AND THE ENGLISH CHANNEL**



Source: ICES

* Subarea 6, European Union and international waters of Division 5.b (EC until 2020; UK thereafter), and international waters of subareas 12 and 14.

⁵³ Lieu jaune | Guide des espèces (guidedesespecies.org)

⁵⁴ ICES 2021-2022

5.2. Production

Catches

In 2021 global production of pollack amounted to 6.423 tonnes. The leading producer by volume was the EU-27, accounting for 50% of the global catches, followed by Norway (30%) and the United-Kingdom (19%). The main EU countries in terms of catch volume were France (51%), Ireland (19%) and to a lesser extent Spain, Denmark and Germany, together accounting for 94% of total EU catches in 2021.

Between 2012 and 2021, global catches of pollack decreased by 23%. Production in the main countries has declined over the last ten years. Production in the EU-27, the United Kingdom and the Channel Islands decreased by 30%, 45% and 70% respectively during this period. Production increased in Norway (+32%) and the Faroe Islands (+26%).

Table 25. **TOTAL WORLD CATCHES OF POLLACK (volume in tonnes)**

Country	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	% change 2021/2012
EU	4.590	5.328	5.767	4.633	4.581	4.200	3.849	3.498	3.633	3.234	-30%
Norway	1.449	1.411	1.787	1.829	1.946	2.028	2.672	2.766	3.031	1.913	+32%
United Kingdom	2.216	2.255	2.470	2.111	2.322	1.862	1.749	1.533	1.593	1.226	-45%
Channel Islands	90	56	73	58	57	59	44	33	27	27	-70%
Faroe Islands	17	10	20	17	21	10	14	38	26	21	+26%
Isle of Man	8	7	4	3	2	0	2	1	2	2	-74%
Greenland	0	0	0	0	1	0	0	0	0	0	
Iceland	0	0	1	1	0	0	0	1	0	0	
Total	8.370	9.067	10.123	8.652	8.930	8.159	8.330	7.870	8.312	6.423	-23%

Source: FAO.

Landings in the EU

In 2021, landings of pollack in the EU-27 amounted to 2.876 tonnes. The fact that the volume of pollack caught by the EU fleet (in live weight equivalent) is much higher than the volume landed (in net weight) may be due to the fact that some fish are processed on board before landing (heading and gutting) and as well that a share of EU catches is landed in third countries, for instance the UK or Norway.

Since 2012, France has been the main landing EU country, accounting for 47% of the total EU landing volumes in 2021, followed by Ireland (22%), Denmark (16%) and Spain (12%).

From 2012 to 2021, EU-27 landings of pollack decreased (-41%). They reached their lowest level in 2021 while reaching a peak in 2014. This decreasing trend was mostly attributable to France (-53%) and Ireland (-39%), whereas landings were more stable in Denmark (+4%) and Spain (-3%).

Table 26. **LANDINGS OF POLLACK IN THE EU (volume in tonnes)**⁵⁵

Country	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
France	2.913	3.352	3.856	2.564	2.771	2.021	1.744	1.710	1.782	1.358
Ireland	1.028	1.109	979	1.114	1.149	728	780	648	626	622
Denmark	445	447	502	725	449	689	593	555	656	461
Spain	359	375	293	304	323	239	327	375	340	350
Portugal	2	3	1	18	28	38	33	57	54	54
Belgium	48	39	88	42	41	27	25	20	19	14
Netherlands	1	1	0	5	3	6	11	8	24	9
Sweden	70	63	59	31	24	15	35	13	9	6
Germany	9	4	7	21	6	49	4	2	4	2
Total	4.874	5.393	5.785	4.824	4.795	3.812	3.552	3.388	3.515	2.875

Source: Eurostat.

5.3. Pollack: first sales in the EU

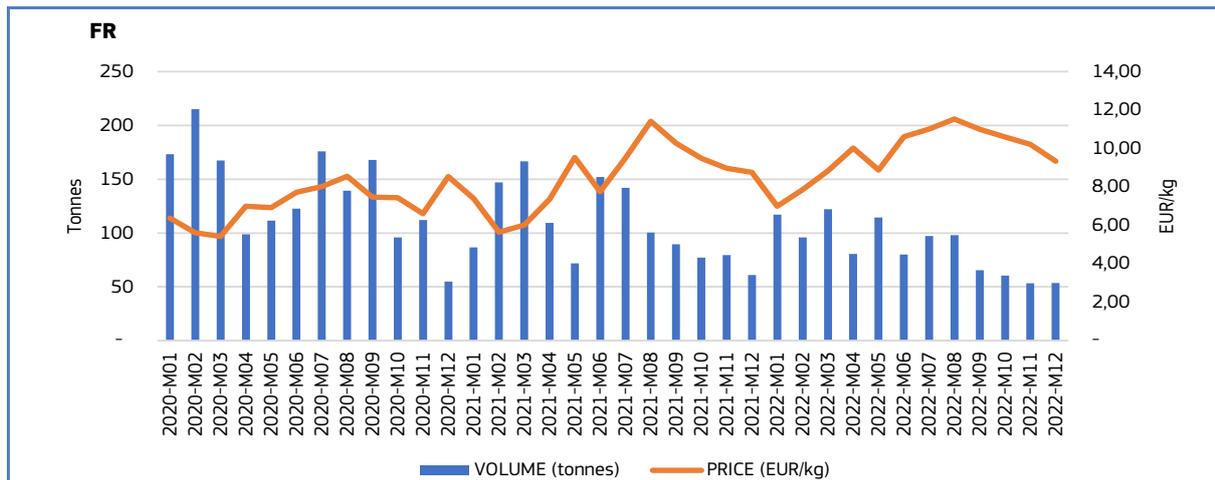
In 2022, the first sales of pollack in the Member States currently involved in data transmission to EUMOPA⁵⁶ amounted to 1.465 tonnes at a value of almost EUR 12,6 million and an average price of 8,62 EUR/kg. Among the reporting countries, France accounted for most first-sale volumes (71%), followed by Spain (21%), Sweden (4%) and Portugal (3%).

Between 2021 and 2022, total first-sale volumes decreased by 19%: they fell by 19% in France, 14% in Spain, 21% in Sweden and 12% in Portugal. At the same time, the average price increased by 13%. In all main reporting countries, first-sale data show a seasonality, with most first sales occurring during winter when peaks in sales volumes may be observed to a greater or lesser extent depending on the country. In Spain and Portugal, most first sales take place between November and January, while in Sweden, the peaks of first sales are scarcer and can take place between August and October, but also between March and May. In France, first sales of pollack vary less throughout the year, although some fluctuations can be observed. Except for Sweden, which seems to have first-sale price variations correlated with first-sale volumes (with price peaks around October), first-sale prices fluctuations in France, Spain and Portugal do not seem correlated to volumes. Prices recorded in France between January 2020 and December 2022 (8,06 EUR/kg on average) were higher than prices recorded in Spain (6,69 EUR/kg) and Sweden (4,38 EUR/kg). In 2022, the four most important places of sale for pollack in volume terms were in France with Audierne, les Sables-d'Olonne, Lorient and Concarneau. Spain, with Santa Eugenia Ribeira come only in 10th position.

⁵⁵ Totals do not correspond exactly to actual sums because of roundings.

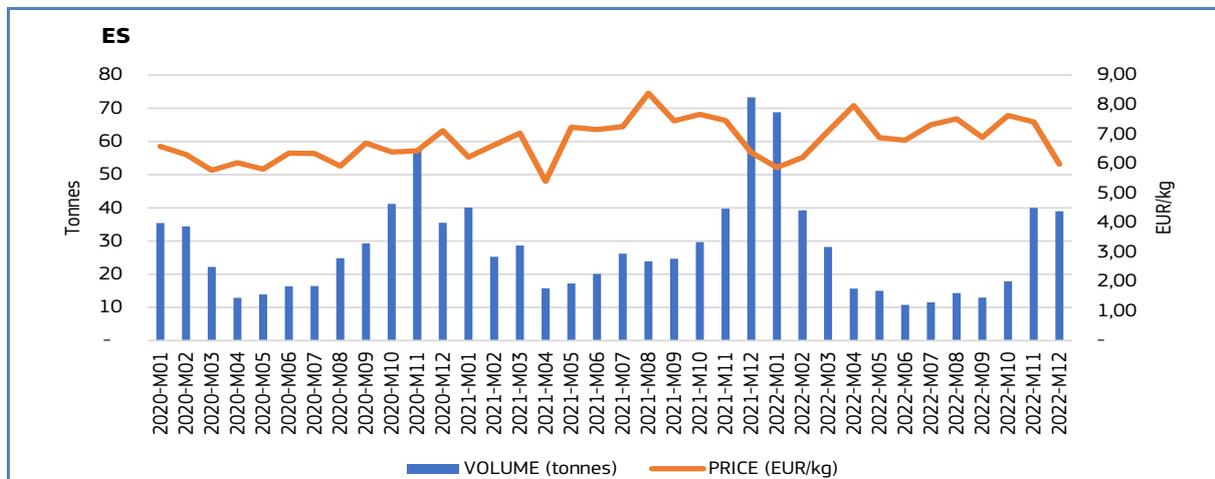
⁵⁶ Including BE, BL, CY, DK, ES, FR, DE, GR, IT, LV, LT, NL, PL, PT, ES, SE and excluding Ireland which is one of the main MS for pollack fishy-sales. For more information about the data coverage: <https://www.eumofa.eu/sources-of-data#firstSaleTab>

Figure 50. **FIRST SALES: POLLACK IN FRANCE**



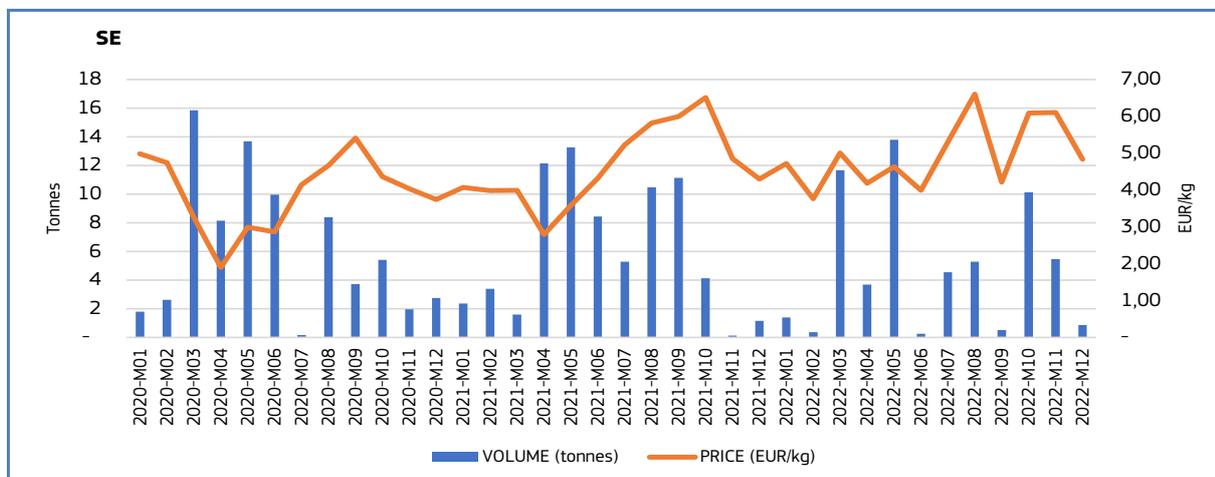
Source: EUMOFA.

Figure 51. **FIRST SALES: POLLACK IN SPAIN**



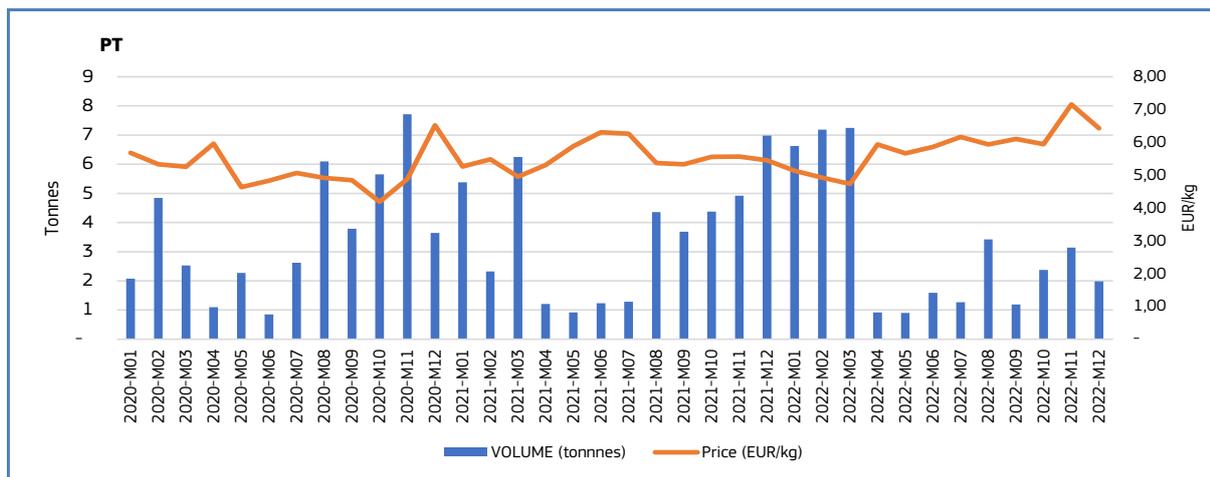
Source: EUMOFA.

Figure 52. **FIRST SALES: POLLACK IN FRANCE SWEDEN**



Source: EUMOFA.

Figure 53. **FIRST SALES: POLLACK IN PORTUGAL**



Source: EUMOFA.

5.4. International trade

EU trade flows and supply

In the combined nomenclature (CN)⁵⁷ used for registering EU import-export data, pollack is specifically reported as frozen, fresh or chilled⁵⁸.

In 2022, the EU-27 imported 1.584 tonnes of pollack at a value of EUR 8 million, mostly fresh or chilled (97% of the imports total value). The major provider of pollack to the EU market was Norway, accounting for 56% of the extra-EU import value, followed by the United Kingdom (44%). France received 43% of the pollack extra-EU imports value. France, Denmark and Sweden together accounted for 95% of extra-EU imports value.

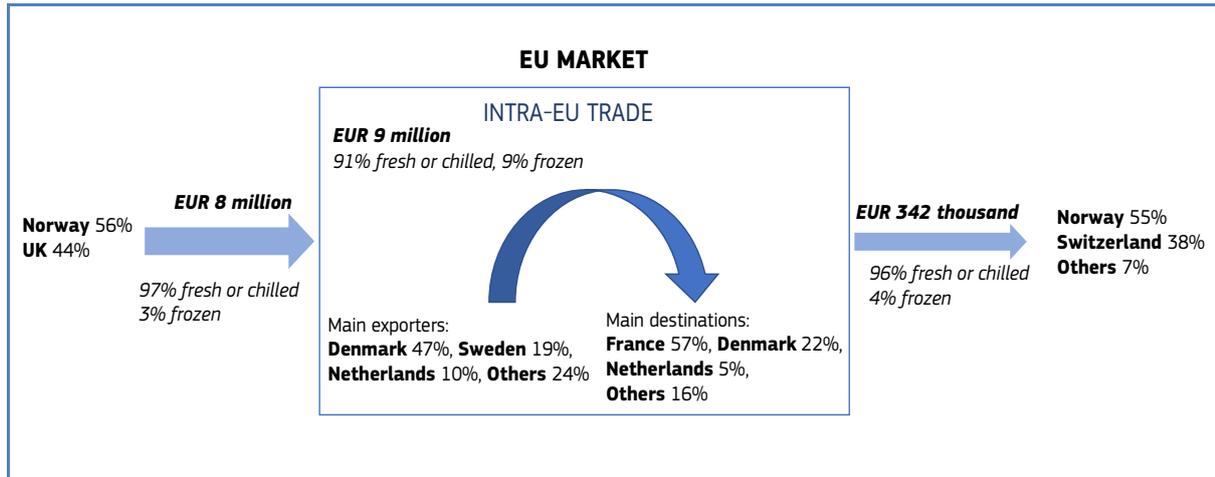
In the same year, EU exports to third countries amounted to just 58 tonnes at a value of EUR 342.000. Fresh or chilled pollack accounted for 96% of the total extra-EU export value whereas frozen pollack accounted for 4% of the total export value. The main destination in value terms was Norway, accounting for 55% of the total extra-EU export value, followed by Switzerland (38%).

In 2022, intra-EU exports amounted to 1.620 tonnes of pollack products at a value of EUR 9 million. The intra-EU trade was dominated by fresh or chilled pollack, which accounted for 91% of the trade value, followed by frozen pollack (9%). The main exporting countries within the EU were Denmark (47% of the intra-EU export value) and Sweden (19%), followed by the Netherlands (10%). France (57% of the total intra-EU export value), Denmark (22%) and the Netherlands (5%) were the main destinations for the intra-EU exports.

⁵⁷ 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.

⁵⁸ 0302 59 30 Fresh or chilled pollack "*Pollachius pollachius*"; 0303 69 50 Frozen pollack "*Pollachius pollachius*".

Figure 54. **THE POLLACK EU-TRADE MARKET IN 2022, IN VALUE**



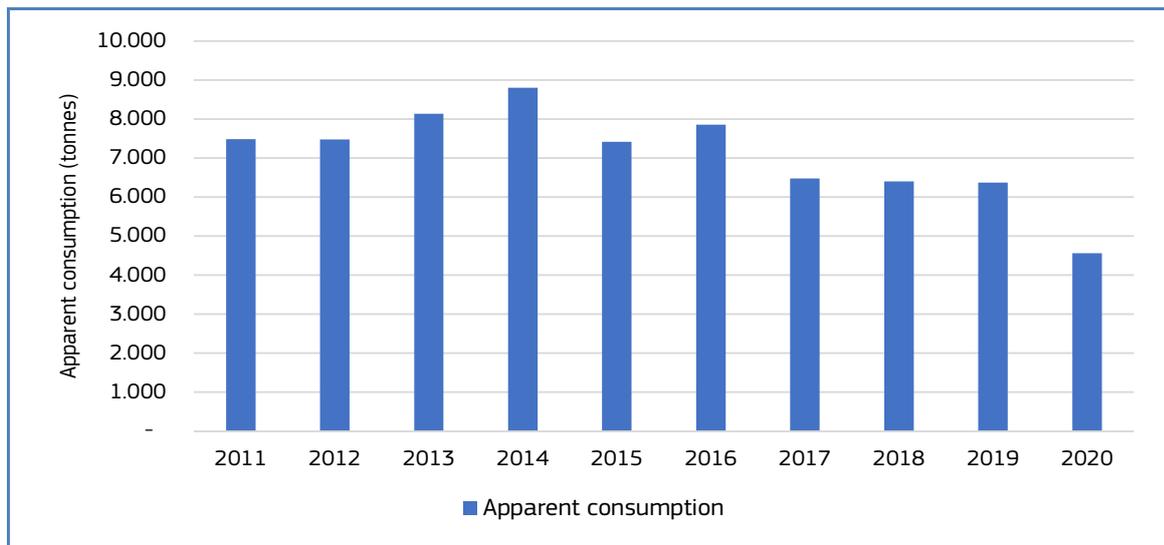
Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

5.5. Consumption

Pollack is a fish eaten mainly on the European continent. Similar in taste and texture to cod⁵⁹, pollack is mainly sold fresh in whole, steak or fillet form. This fish is known for its thin, flaky flesh⁶⁰ and is well appreciated in restaurants, especially in coastal areas where it is landed.

EU apparent consumption of pollack between 2011 and 2020 is estimated to vary between 4.000 and 9.000 tonnes. This value reached a peak in 2014, with 8.801 tonnes after a peak in EU catches. Apparent consumption was lowest in 2020, at 4.563 tonnes. From 2011 to 2020, apparent consumption of pollack decreased by 39%.

Figure 55. **THE APPARENT CONSUMPTION OF POLLACK IN THE EU-27**



Source: EUMOFA

⁵⁹ Pollack, Cornwall Good Seafood Guide

⁶⁰ Lieu jaune | Guide des espèces (guidedesespeces.org)

6. Global highlights

EU / World: On 19 June 2023, the Treaty of the High Seas was adopted by consensus and standing ovation during the United Nations meeting in New York. This Treaty is key to protecting the ocean, promoting equity and fairness, tackling environmental degradation, fighting climate change, and preventing biodiversity loss in the high seas. The Treaty will enter into force when 60 parties ratify it. The European Union has committed to support the Treaty's ratification and early implementation through the EU Global Ocean Programme of 40 million euros and has invited members of the High Ambition Coalition to do the same within their capabilities⁶¹.



EU / Fisheries / Aquaculture: On 16 June 2023, the European Commission launched the Energy Transition Partnership for fisheries and aquaculture at the high-level conference 'Joining forces for the energy transition in EU fisheries and aquaculture'. The Partnership aims to provide a central platform for all actors of the sea to share knowledge and solutions, and to coordinate efforts in order to achieve a climate-neutral sector by 2050, as set out in the Communication on the energy transition in EU fisheries and aquaculture⁶².

EU / Sustainability: The overall sustainability of the EU fisheries has improved, and fewer stocks are overfished, according to a Commission Communication 'Sustainable fishing in the EU: state of play and orientations for 2024'. At the same time, more efforts are necessary to ensure the resilience of fishing activities and continuous improvement of the fish stocks status. The Commission's Communication is based on independent scientific assessments⁶³.

EU / Bluefin tuna fishery: On 26 May 2023 the bluefin tuna fishery season started in the Mediterranean Sea, with 202 purse seiners involved. The European Fishery Control Agency (EFCA) coordinates the EU fisheries control efforts towards EU and third country flagged vessels in international waters under the ICCAT Joint Scheme of International Inspection, ensuring compliance with the international and EU legal framework in force⁶⁴.

Denmark / Fisheries / Closure: Denmark has established a new Real-Time Closure (RTC) in their waters of The Skagerrak. The closure is set for the period from 24 May 2023 to 13 June 2023 23:59 hrs⁶⁵.

Iceland / Fisheries: The total fish catch of Icelandic vessels in May was 102.000 tonnes, 11% less than in May 2022. The demersal catch was nearly 38.000 tonnes, a decrease of 24%. Of demersal species, the cod catch was about 21.000 tonnes. The pelagic catch, which was nearly all blue whiting, was just above 60.000 tonnes in May 2023, 35% less than in May 2022. In the 12-month period from June 2022 to May 2023 the overall catch was 1.346.000 tonnes which is 11% less than in the same period one year earlier⁶⁶.

UK / Sandeel / Fishery: UK fishermen will not be permitted to catch or swap any of the UK's 5.773 tonnes of North Sea sandeel quota in 2023. For the third consecutive year, the UK government has decided to not allow UK sandeel fishing for 2023 for the benefit of the wider marine ecosystem such as seabirds and marine mammals that feed on these eel-like fish. Sandeels are an important forage fish and dietary source for vulnerable seabirds, marine mammals and commercially valuable fish. Industrial fishing of sandeels is shown to have an impact on the health of these other species within the marine ecosystem⁶⁷.

⁶¹ https://oceans-and-fisheries.ec.europa.eu/news/historic-achievement-treaty-high-seas-adopted-2023-06-19_en

⁶² https://oceans-and-fisheries.ec.europa.eu/news/sustainable-fisheries-launch-energy-transition-partnership-eu-fisheries-and-aquaculture-2023-06-16_en

⁶³ https://ec.europa.eu/commission/presscorner/detail/en/IP_23_3283

⁶⁴ <https://www.efca.europa.eu/en/content/pressroom/eu-bluefin-tuna-fishing-season-mediterranean-opens-reinforced-fisheries-control>

⁶⁵ <https://www.efca.europa.eu/en/content/pressroom/new-real-time-closure-rtc-established-denmark-13>

⁶⁶ <https://www.static.is/publications/news-archive/fisheries/fish-catch-in-may-2023/>

⁶⁷ <https://thefishingdaily.com/uk-fishing-industry-news-news/no-uk-sandeel-fishing-or-swaps-for-2023-in-effort-to-protect-marine-ecosystem/>

7. Macroeconomic Context

7.1. Marine fuel

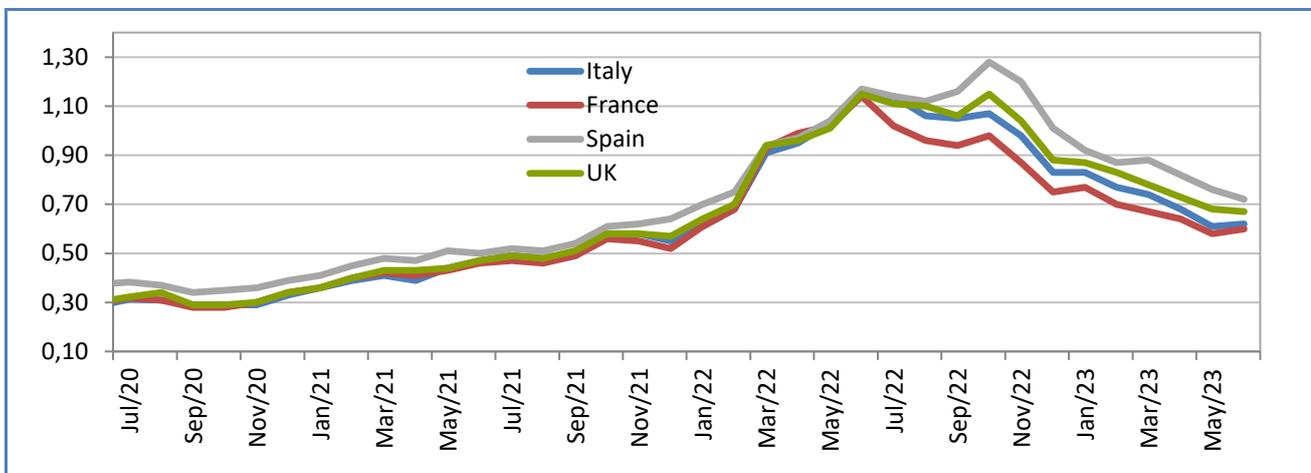
Average prices for Marine fuel in **June 2023** ranged between 0,60 and 0,72 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices decreased by an average of about 0,8% compared with the previous month, and they also decreased by an average of 43,3% compared with the same month in 2022.

Table 27. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	June 2023	Change from May 2023	Change from June 2022
France <i>(ports of Lorient and Boulogne)</i>	0,60	3%	-47%
Italy <i>(ports of Ancona and Livorno)</i>	0,62	2%	-46%
Spain <i>(ports of A Coruña and Vigo)</i>	0,72	-5%	-38%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,67	-1%	-42%

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

Figure 56. **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 7,1% in May 2023, down from 8,1% in April 2023. A year earlier, the rate was 8,8%.

Inflation: lowest rates in May 2023, compared with May 2023.



Inflation: highest rates in May 2023, compared with May 2023.



Table 28. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

	May 2021	May 2022	Apr 2023	May 2023	Change from Apr 2023		Change from May 2022	
Food and non-alcoholic beverages	111,24	122,38	140,23	140,78	↑	0,4%	↑	15,0%
Fish and seafood	114,37	125,39	138,90	138,99	↑	0,1%	↑	10,9%

Source: Eurostat.

7.3. Exchange rates

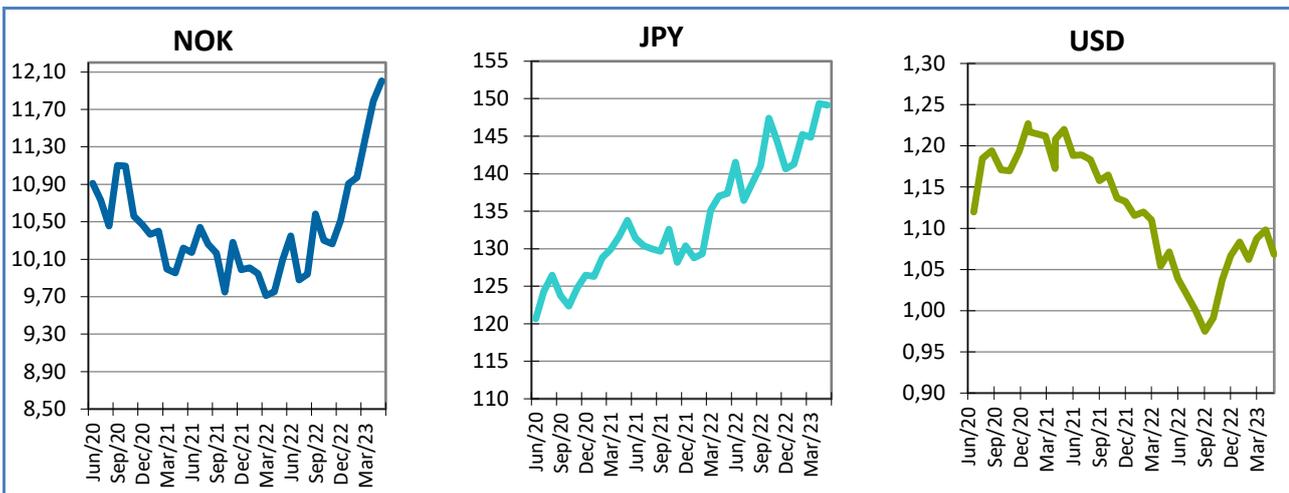
Table 29. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	May 2021	May 2022	Apr 2023	May 2023
NOK	10,2183	10,0983	11,7910	12,0045
JPY	133,79	137,36	149,35	149,13
USD	1,2201	1,0713	1,0981	1,0683

Source: European Central Bank.

In May 2023, the euro appreciated against the Norwegian krone (1,8%) and depreciated against the US dollar (2,7%), and the Japanese yen (0,1%), relative to the previous month. For the past six months, the euro has fluctuated around 1,0776 against the US dollar. Compared with May 2022, the euro has appreciated 18,9% against the Norwegian krone and 8,6% against the Japanese yen and depreciated 0,3% against the US dollar.

Figure 57. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

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

First sales: EUR-Lex, DG MARE – European Commission, EUR-Lex, ICES, FAO, Directorate-General for Natural Resources, Safety and Maritime Services, FishBase, ICES Journal of Marine Science, Marine Conservation Society.

Consumption: Britannica, DG MARE – European Commission.

Case studies: CIA the World Factbook, Magyarország Kormányának Halmazdalkodási Honlapja, MA-HAL Feher Konyv, FAO, Kapj ra.

Global highlights: European Commission DG Mare, EFCA, Statistics Iceland, The Fishing Daily.

Macroeconomic context: EUROSTAT, Chamber of Commerce of Forlì-Cesena, Italy: DPMA, France: ARVI, Spain: MABUX, European Central Bank.

The underlying first-sales data is in an annex available on the EUMOFA website. Analyses are made at aggregated (main commercial species) level and according to the EU Electronic recording and reporting system (ERS).

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

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

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

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