European Commission

Monthly Highlights

No. 9 / 2022

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

In this issue

In July 2022, 10 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups (CG). Out of the 10 CGs in the countries monitored by EUMOFA, the "salmonids" commodity group recorded the 9th highest value and volume.

Over the 36-month observation period (August 2019 to July 2022), the weighted average first-sales price of sea trout in Lithuania was 7,84 EUR/kg, 28% higher than in France (6,11 EUR/kg), and 171% higher than in Portugal (2,89 EUR/kg).

In the period January-July 2022 the retail price of shrimp Crangon spp. was 18% higher in the Netherlands than in the same period in 2021.

In 2020 global production of monks amounted to 91.000 tonnes, which is the lowest production volume of the decade and a 17% reduction compared to the peak year 2017.

Global oyster production in 2020 was mainly from aquaculture (98% in 2020). Total production amounted to approx. 6,4 million tonnes, which was 39% more than in 2011.

In line with the ambition to protect nature and restore biodiversity, the Commission has taken steps to close 87 sensitive zones to all bottom gears in the EU waters of the North-East Atlantic.

Contents

Find all data, information, and more at:
www.eumofa.eu

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1. First sales in Europe

From **January–July 2022**, 10 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups (CG)[1]. First-sales data are based on sales notes and data collected from auction markets. First sales data analysed in the section *"First sales in Europe"* are extracted from EUMOFA[2].

1.1. January-July 2022 compared to the same period in 2021

Increases in value and volume: France and Portugal recorded an increase in both first sales value and volume. Increases in volume and value in France were mainly due to octopus and scallop, while in Portugal they were due to octopus and squid.

Decreases in value and volume: Bulgaria, Cyprus, Estonia, Latvia and Lithuania recorded decreases in first sales. Bulgaria, Cyprus and Lithuania stood out with the most significant drop in absolute terms. In Bulgaria it was due to lower first sales of clam and sprat. In Cyprus mainly albacore tuna and seabreams, apart from gilthead seabream, added to the decrease. In Lithuania it was due to herring and smelt, both in volume and value.

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

	January – July 2020		January – July 2021		January – July 2022		Change from January – July 2021	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Bulgaria	1.521	0,7	2.748	1,6	1.600	1,0	-42%	-40%
Cyprus	598	2,1	533	2,3	305	1,6	-43%	-30%
Estonia	35.848	9,4	39.651	10,5	38.558	10,1	-3%	-4%
France	141.564	335,2	155.004	383,3	165.318	429,8	7%	12%
Italy	50.186	186,2	52.247	214,6	45.624	215,3	-13%	0%
Latvia	24.066	4,8	27.427	5,9	22.410	4,8	-18%	-18%
Lithuania	1.109	0,5	1.473	0,8	745	0,5	-49%	-42%
Netherlands	141.878	204,6	103.819	156,5	117.942	136,3	14%	-13%
Portugal	50.347	127,5	57.834	149,4	58.278	174,7	1%	17%
Spain	308.508	841,9	301.372	872,6	270.439	920,3	-10%	5%
Norway	1.923.865	1583,4	1.780.231	1531,7	1.742.774	1890,0	-2%	23%
United Kingdom	153.783	296,3	174.808	313,8	156.941	341,6	-10%	9%

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, salmonids, groundfish, salmonids, small pelagics, tuna and tuna-like species, and other marine fish.
[2] First-sales data updated on 24.9.2022.

1.2. July 2022 compared to July 2021

Increases in value and volume: First sales increased in Latvia and France both in value and volume. Herring and sprat were mainly responsible for the boost in Latvia, while cod and scallop were behind the increase in France.

Decreases in value and volume: First sales decreased in Bulgaria, Cyprus, Estonia, Latvia, Lithuania, the Netherlands, Spain and the United Kingdom. Most significant decreases were observed in Bulgaria and Cyprus, explained by sprat and clam in Bulgaria, and by albacore tuna and swordfish in Cyprus.

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

	July 2020		July 2021		July 2022		Change from July 2021	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Bulgaria	491	0,2	744	0,4	174	0,1	-77%	-61%
Cyprus	287	0,7	240	0,7	104	0,4	-57%	-42%
Estonia	217	0,4	274	0,5	230	0,5	-16%	-3%
France	31.383	55,8	27.806	58,4	31.256	60,0	12%	3%
Italy	10.681	38,5	8.958	36,2	8.620	38,1	-4%	5%
Latvia	1.404	0,2	972	0,2	1.601	0,3	65%	63%
Lithuania	5	0,001	4	0,002	2	0,003	-41%	0%
Netherlands	25.581	37,8	11.786	20,7	11.385	20,4	-3%	-2%
Portugal	12.589	25,9	15.902	29,1	14.657	31,2	-8%	7%
Spain	54.448	161,8	54.030	167,8	39.619	137,6	-27%	-18%
Norway	130.756	114,6	126.505	126,1	103.946	126,5	-18%	0%
United Kingdom	23.269	46,4	20.979	54,2	19.048	52,0	-9%	-4%

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 43 of 2022)** are available via the EUMOFA website, and can be accessed **here**.

The most recent monthly first-sales data **for September 2022** are available via the EUMOFA website and can be accessed **here**.

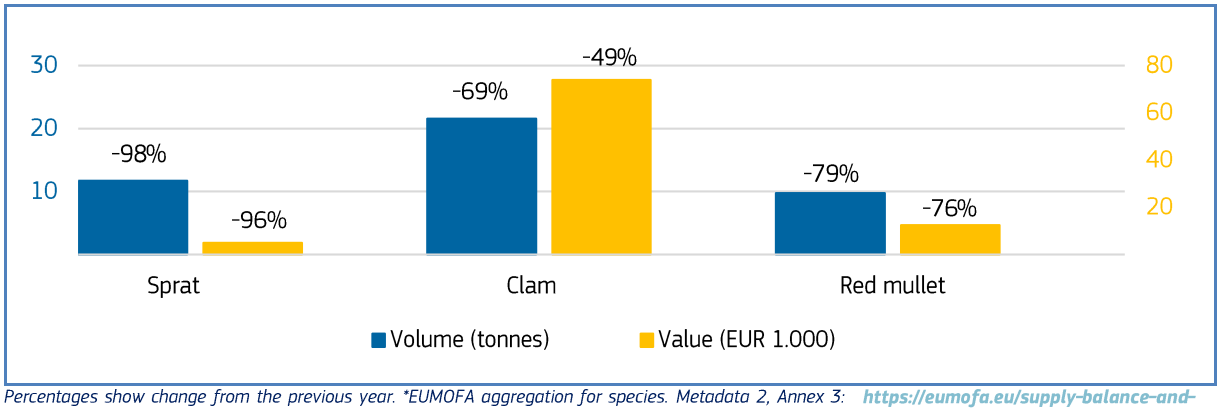
1.3. First sales in selected countries

First sales data analysed in this section are extracted from EUMOFA[3].

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2022 vs Jan-Jul 2021	EUR 1 million, -40%	1.600 tonnes, -42%	Clam, sprat, red mullet, other molluscs and aquatic invertebrates*.
Jul 2022 vs Jul 2021	EUR 0,1 million, -61%	174 tonnes, -77%	Sprat, clam, red mullet.

Figure 1. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA, JULY 2022**



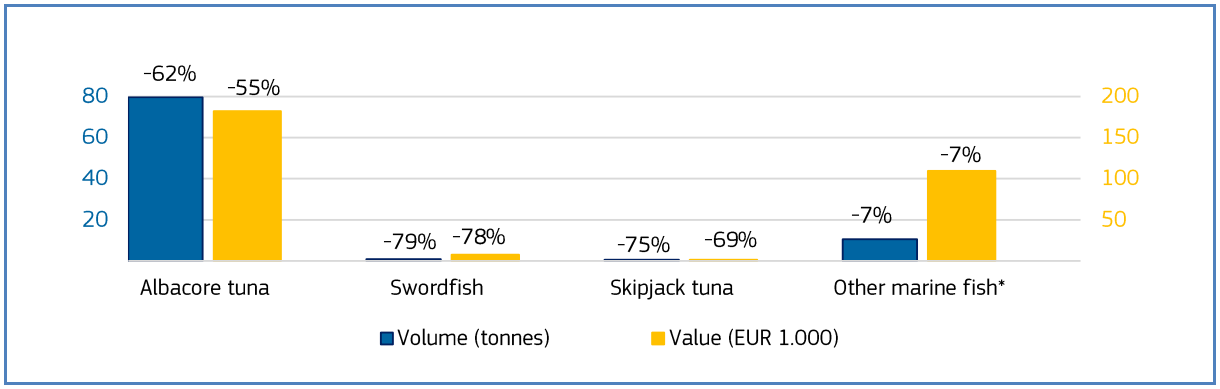
*Percentages show change from the previous year. *EUMOFA aggregation for species. Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies*

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Jul 2022 vs Jan-Jul 2021	EUR 1,6 million, -30%	305 tonnes, -43%	Albacore tuna, other seabream* (other than gilthead seabream), swordfish, other marine fish*.	In July 2022 significant first-sales decreases were recorded for **swordfish** and **albacore tuna** compared to July 2021. In July swordfish did not constitute a target stock for the Cyprus fleet using surface longline for large pelagic stocks. In this period swordfish was only an accessory stock landed during the albacore fishing season, usually carried out from June to August - September. Two hypotheses can be put forward to justify the reduction observed in landing value and volume from July 2021 to July 2022: 1) 2022 is the first year of quota implementation for Mediterranean Albacore fisheries, so the fleet exploiting albacore in Cyprus probably experienced some delay in its activity due to the quota allocation process; 2) in July, 2022 the albacore stock was not so abundant and the fleet exerted a lower fishing effort than in the same month in 2021.
Jul 2022 vs Jul 2021	EUR 0,4 million, -42%	104 tonnes, -57%	Albacore tuna, swordfish, skipjack tuna, other marine fish*.	

[3] First-sales data updated on 26.9.2022.

Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS, JULY 2022**

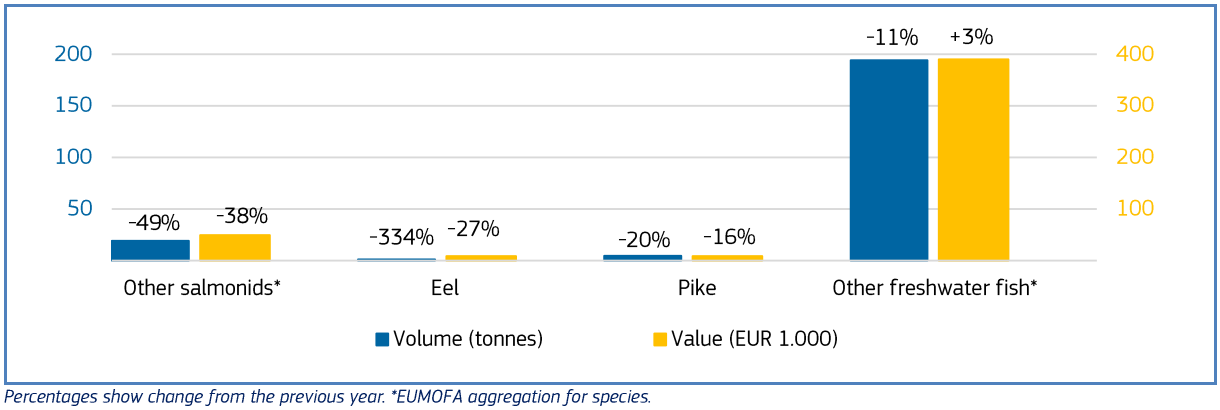


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2022 vs Jan-Jul 2021	EUR 10,1 million, -4%	38.558 tonnes, -3%	Herring, smelt, pike-perch.
Jul 2022 vs Jul 2021	EUR 0,5 million, -3%	230 tonnes, -16%	Other salmonids*, eel, pike, other freshwater fish*.

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, JULY 2022**

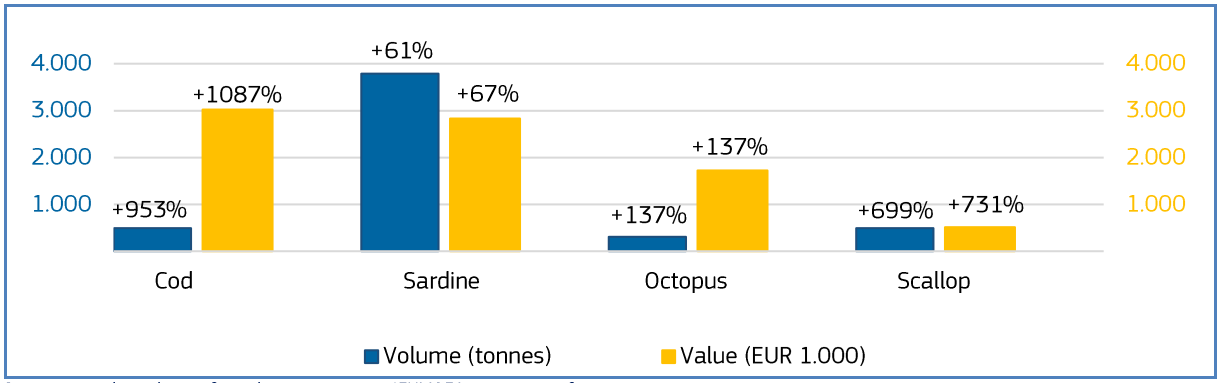


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Jul 2022 vs Jan-Jul 2021	EUR 429,8 million, +12%	165.318 tonnes, +7%	Octopus, scallop, hake, Seaweed and other algae*.	In July 2022 **cod** first sales registered a remarkable increase compared to July 2021 in terms of volume (from 9 tonnes to 465 tonnes, +5059%) and value (+4334%). The change observed between July 2021 and July 2022 looks likely to be a 'compensation'/'catch-up' of the change observed between June 2021 and June 2022, when the respective cod catches were 474 tonnes (of which 468 tonnes were landed in Saint-Malo, i.e., around 99 % of the French production) and 10 tonnes.
Jul 2022 vs Jul 2021	EUR 60,0 million, +3%	31.256 tonnes, 12%	Cod, scallop, octopus, sardine.	

Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, JULY 2022**

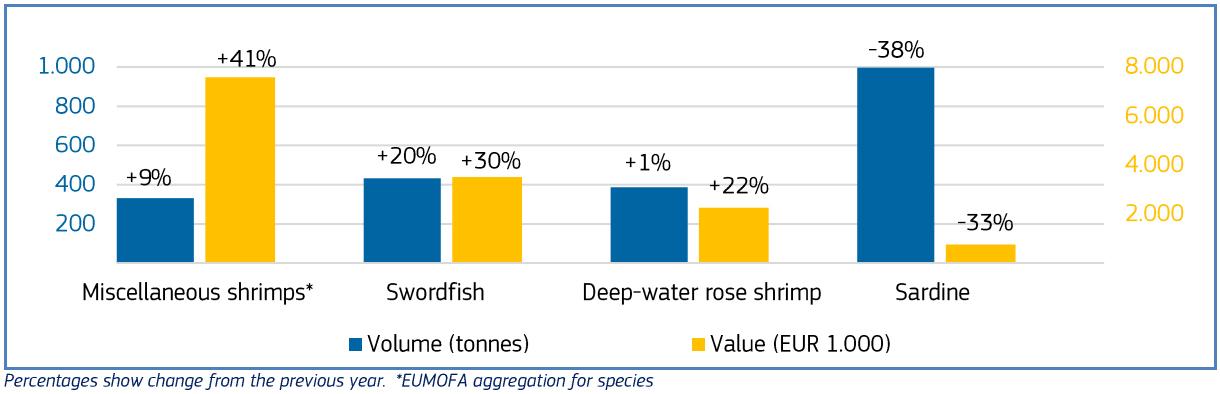


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2022 vs Jan-Jul 2021	EUR 215,3 million, 0%	45.624 tonnes, -13%	**Value**: Miscellaneous shrimps*, clam, hake. **Volume**: Clam, sardine, octopus.
Jul 2022 vs Jul 2021	EUR 38,1 million, +5%	8.620 tonnes, -4%	**Value**: Miscellaneous shrimps*, swordfish, deep-water rose shrimp. **Volume**: sardine.

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, JULY 2022**



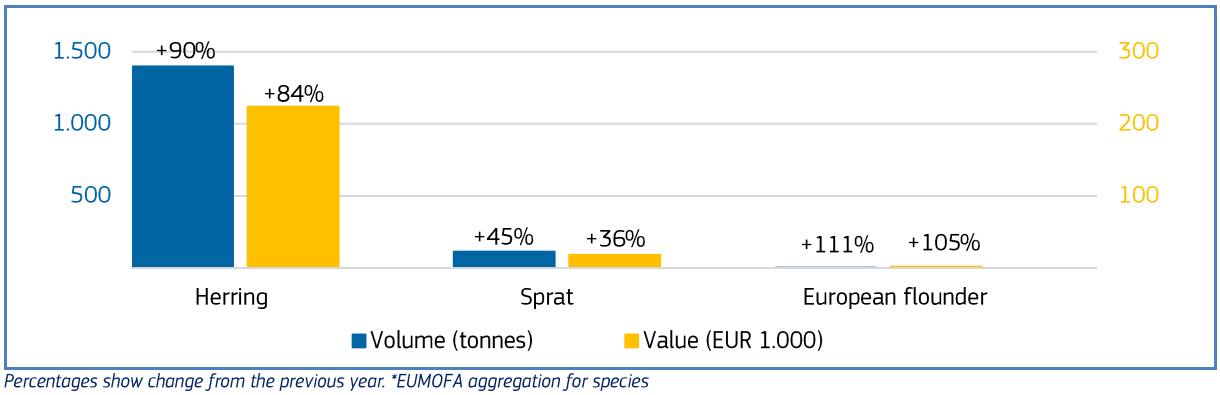
*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Jul 2022 vs Jan-Jul 2021	EUR 4,8 million, -18%	22.410 tonnes, -18%	Herring, other freshwater fish*, smelt.	One of the reasons behind the increase in herring sales is the approx. 20% increase in the total allowable catches in the specific area of the Baltic Sea: the Gulf of Riga. The suppliers in July 2020, 2021 and 2022 operated only there. When comparing the sales of 2020, 2021 and 2022 it looks like the high increase in volume and value is only noticeable between July 2021 and 2022. Sales in July 2020 and 2022 are similar, so it could be concluded that sale volumes in 2021 were unusually low. The price in the
Jul 2022 vs Jul 2021	EUR 0,3 million, +63%	1.601 tonnes, +65%	Herring, sprat, European flounder.	

				3-year period is quite similar and shows that market demand was satisfied. It might be considered that available resources, favourable weather conditions and capacity of suppliers made it possible to provide the market with a higher quantity of herring.

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, JULY 2022**

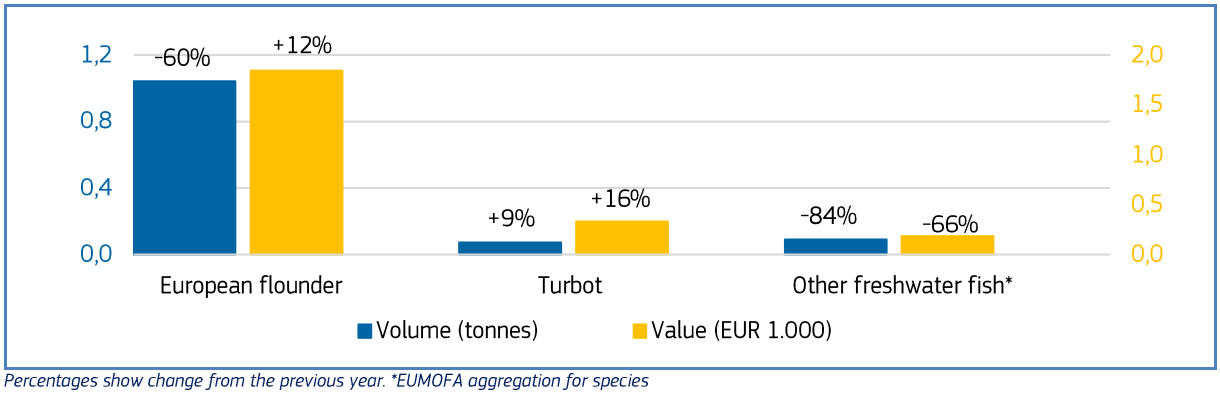


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Jul 2022 vs Jan-Jul 2021	EUR 0,5 million, -42%	745 tonnes, -49%	Herring, smelt, other groundfish*, sprat.
Jul 2022 vs Jul 2021	EUR 2,7 thousand 0%	2 tonnes, -41%	Turbot, European flounder, other freshwater fish*.

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, JULY 2022**

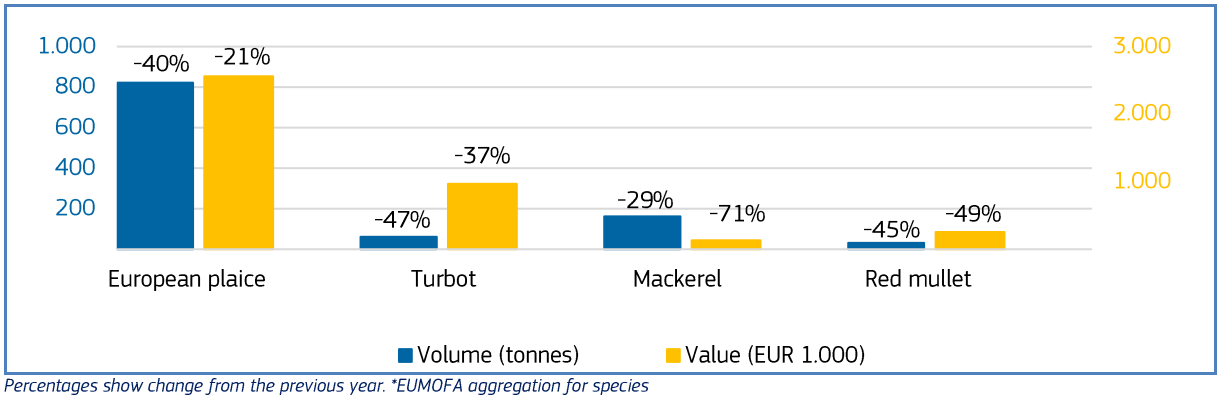


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2022 vs Jan-Jul 2021	EUR 136,3 million, -13%	117.942 tonnes, +14%	**Value**: Blue whiting, mackerel, European plaice. **Volume**: Herring, miscellaneous small pelagics*, Atlantic horse mackerel.
Jul 2022 vs Jul 2021	EUR 20,4 million, -2%	11.385 tonnes, -3%	European plaice, turbot, mackerel, red mullet, gurnard.

Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, JULY 2022**



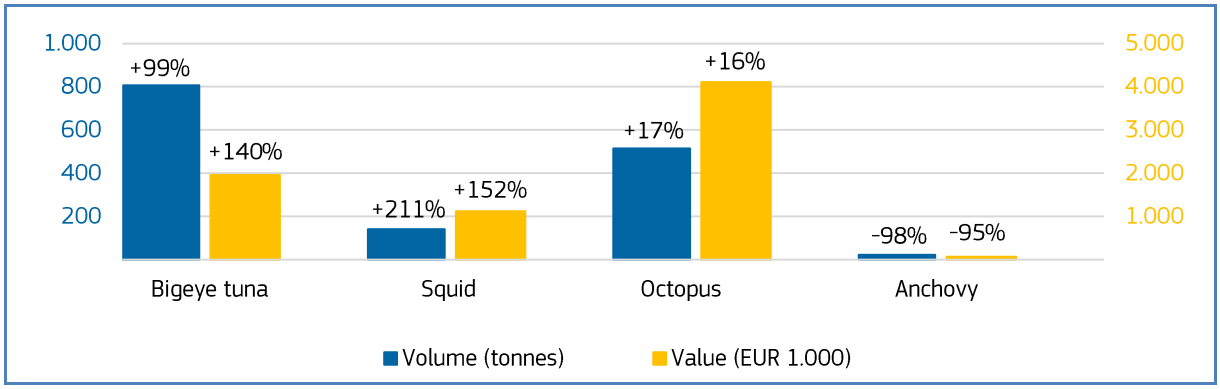
*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Portugal	**First-sales value / trend %**	**First-sales volume / trend %**	**Main contributing species**	**Notes**
Jan-Jul 2022 vs Jan-Jul 2021	EUR 174,7 million, +17%	58.278 tonnes, +1%	Octopus, squid, Atlantic horse mackerel, bigeye tuna.	in July 2022 anchovy recorded a decrease compared to July 2021 in terms of volume (-98%) and value (-95%). The catches reported by Portugal seem to indicate a decrease in the stock biomass. These boom-and-bust episodes are normal for small pelagic stocks such as anchovy, sardine, mackerel, etc. The reference dates for comparison (July 2022 vs. July 2021) show the highest records of the whole time series. The data thus points to an abrupt decrease. On the other hand, the data should be understood in the context of the advice and management system for the anchovy in this area. Firstly, the stock advice for this species is divided into 2 stocks[4]. For the western stock the scientific advice recommended an increase in catches of approx. 80%. However, the recommendation for the southern stock was a decrease of 74%. It should be noted that the assessment methods used for those two stocks are different. Secondly, the fisheries management system allows for exchange of quotas across stocks. The catches reported indicate a mismatch between the advice and fishing behaviour and would need to be followed up.
Jul 2022 vs Jul 2021	EUR 31,2 million +7%	14.657 tonnes, -8%	**Value**: Bigeye tuna, squid, octopus. **Volume**: Anchovy, Atlantic horse mackerel, sardine.	

[4] ICES. 2022. Anchovy (*Engraulis encrasicolus*) in Division 9.a (Atlantic Iberian waters). In Report of the ICES Advisory Committee, 2022. ICES Advice 2022, ane.27.9a. https://doi.org/10.17895/ices.advice.19447751

Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, JULY 2022**

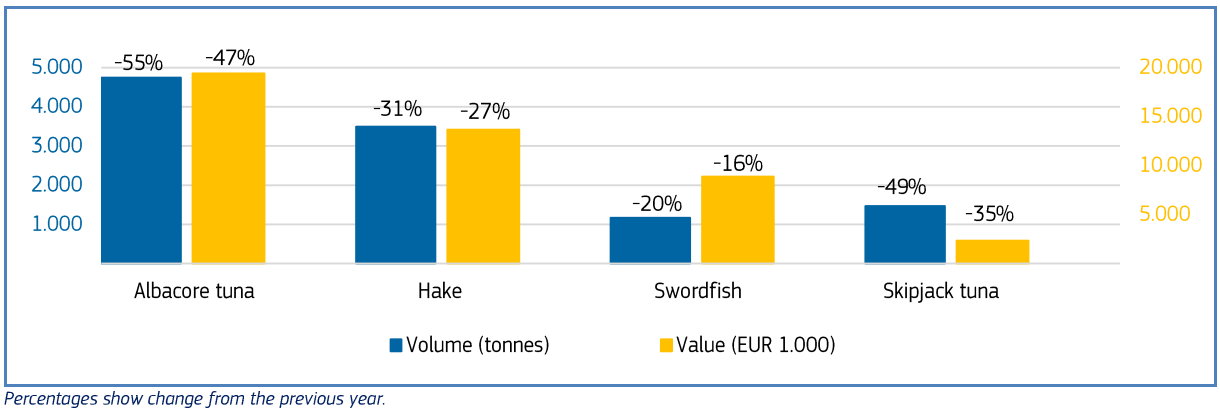


Percentages show change from the previous year.

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2022 vs Jan-Jul 2021	EUR 920,3 million, +5%	270.439 tonnes, -10%	**Value**: Swordfish, yellowfish tuna, mackerel. **Volume**: Albacore tuna, anchovy, Atlantic horse mackerel.
Jul 2022 vs Jul 2021	EUR 137,6 million -18%	39.619 tonnes, -27%	Albacore tuna, hake, swordfish, skipjack tuna.

Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, JULY 2022**

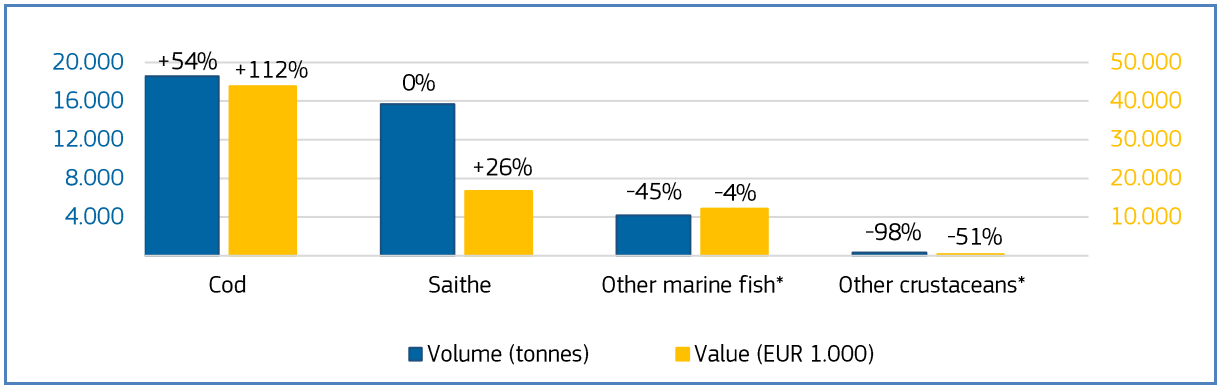


Percentages show change from the previous year.

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2022 vs Jan-Jul 2021	EUR 1,9 billion, +23%	1.743 million tonnes, -2%	**Value:** Cod, saithe, haddock. **Volume:** Other groundfish*, blue whiting, mackerel.
Jul 2022 vs Jul 2021	EUR 126,5 million 0%	103.946 tonnes, -18%	**Value**: Cod, saith, other marine fish*. **Volume**: Other crustaceans*; herring, seaweed and other algae*.

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, JULY 2022**

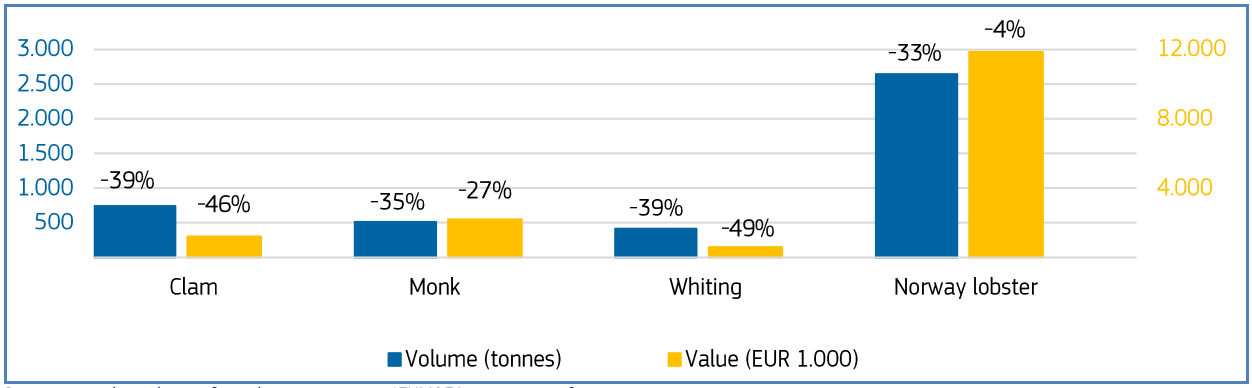


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 14. **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-Jul 2022 vs Jan-Jul 2021	EUR 341,6 million, +9%	156.941 tonnes, -10%	**Value**: Mackerel, monk, common sole. **Volume**: Blue whiting, Norway lobster, other molluscs and aquatic invertebrates*.
Jul 2022 vs Jul 2021	EUR 52,0 million, -4%	19.048 tonnes, -9%	Clam, monk, whiting, Norway lobster.

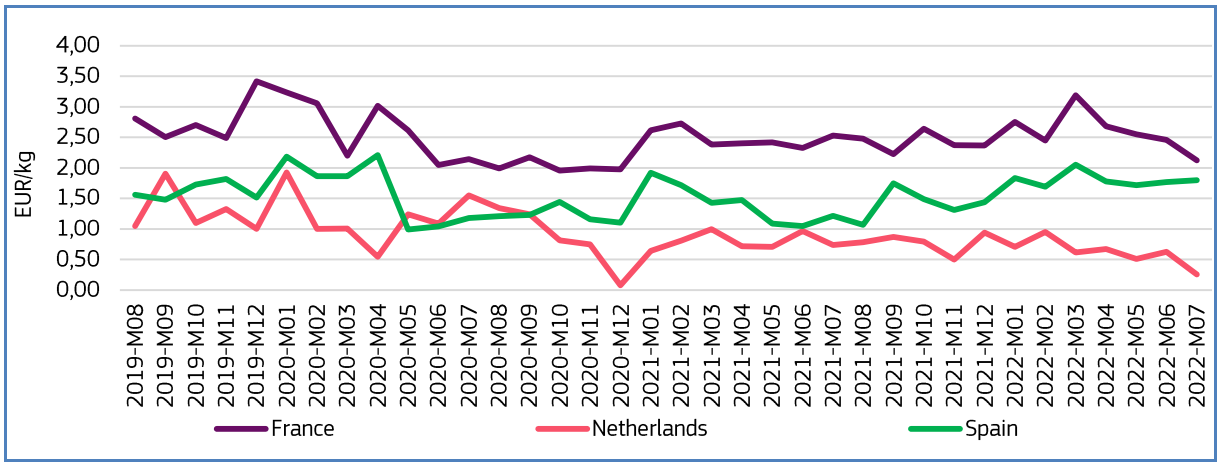
Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, JULY 2022**



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

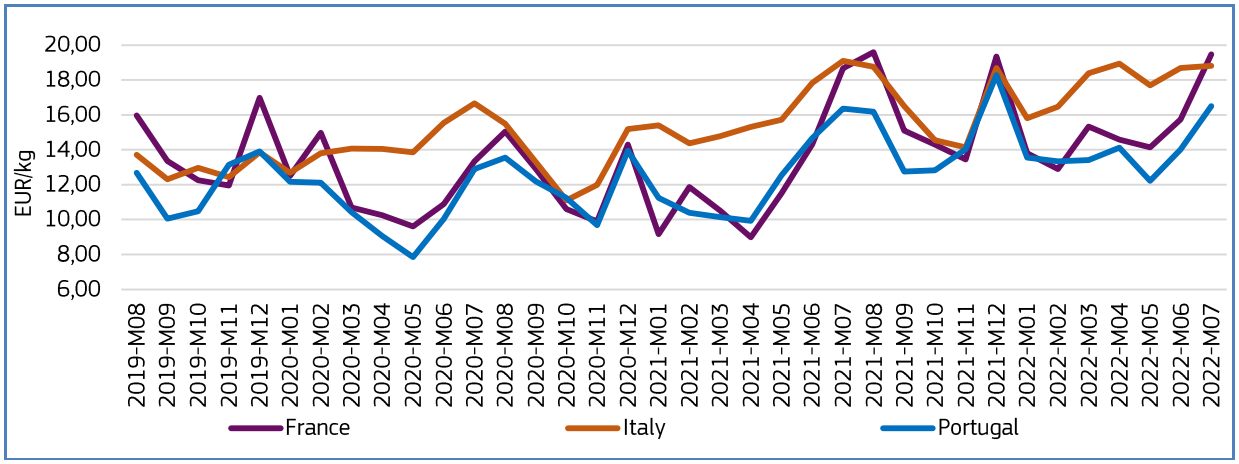
1.4. Comparison of first sales prices of selected species in selected countries[5]

Figure 13. **FIRST-SALES PRICES OF HADDOCK IN FRANCE, THE NETHERLANDS, AND SPAIN**



EU first sales of **haddock** occur in several countries, including **France**, the **Netherlands** and **Spain**. In July 2022, the average first-sales prices of haddock were 2,12 EUR/kg in France (down by 14% in June 2022 and by 16% in July 2021); 0,25 EUR/kg in the Netherlands (down by 59% from the previous month, and by 66% from the previous year); and 1,80 EUR/kg in Spain (up by 2% from June 2022 and by 48% from July 2021). In July 2022, supply increased in all three markets compared to the previous year: France (+16%), the Netherlands (+217%), and Spain (+52%). Supply is seasonal, with peaks between May and November in France; and from June/July to September in the Netherlands. Volumes sold in Spain do not seem to exhibit a clear seasonality. Over the past 36 months, haddock prices showed a stable trend in all surveyed countries. At the same time, supply went up in France and the Netherlands, and decreased in Spain.

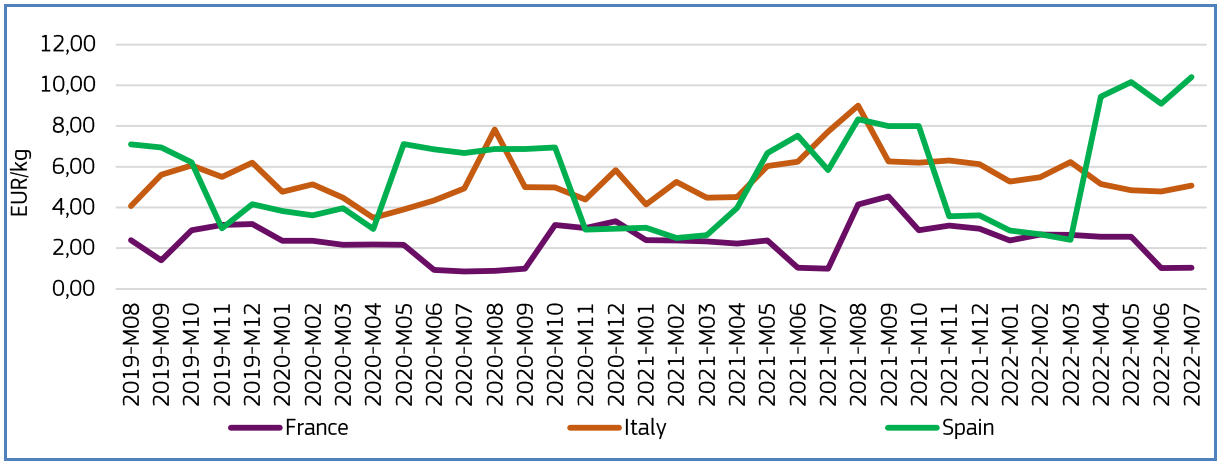
Figure 14. **FIRST-SALES PRICES OF JOHN DORY IN FRANCE, ITALY, AND PORTUGAL**



EU first sales of **John dory** occur predominantly in **France**, as well as **Italy** and **Portugal**. In July 2022, the average first-sales prices of John dory were: 19,47 EUR/kg in France (up by 24% from the previous month and up by 4% from the previous year); 18,82 EUR/kg in Italy (up by 1% from June 2022 , and down by 1% from July 2021); and 16,50 EUR/kg in Portugal (up by 18%, and 1% from both the previous month and the previous year respectively). In July 2022, supply decreased in France (–10%), and Italy (–16%), and increased slightly in Spain (+1%) compared to the previous year. Supply is seasonal, with peaks between May/June and October in France. In Italy supply seemed to peak in the period from March/April to July. Volumes sold in Portugal peaked from July to August/September. In all three markets, over the 36-month period observed, John dory prices showed a slightly upward trend. At the same time, volumes went up in all surveyed countries.

[5] First sales data updated on 26.09.2022.

Figure 15. **FIRST-SALES PRICES OF SCALLOP IN FRANCE, ITALY, AND SPAIN**

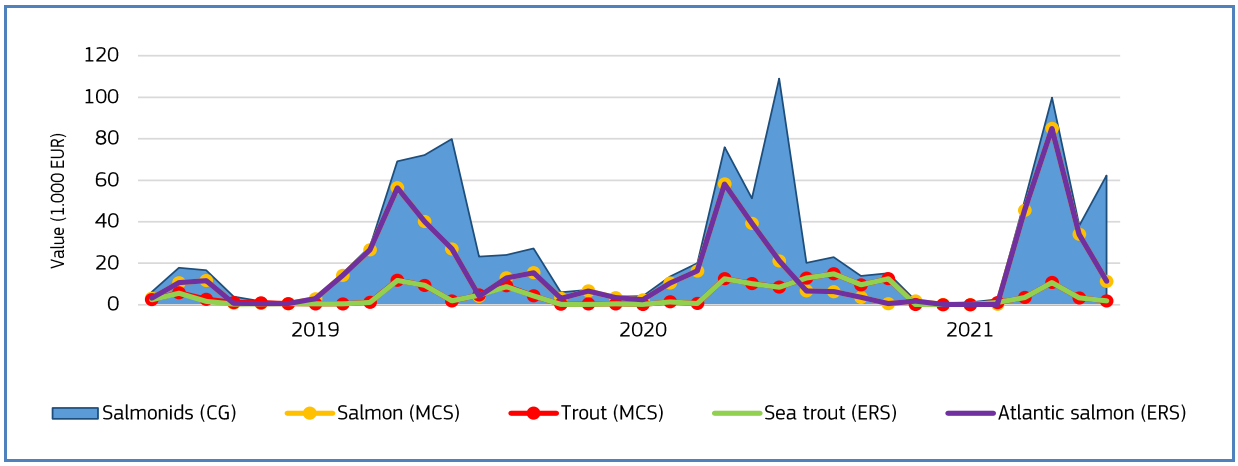


EU first sales of **scallop**[6] occur in multiple countries, including **France**, **Italy** and **Spain**. In July 2022, the average first-sales prices of scallop were 1,04 EUR/kg in France (up by 1%, and 4% from both the previous month and year, respectively); 5,07 EUR/kg in Italy (up by 6% from the previous month, and down by 34% from the previous year); and 10,40 EUR/kg in Spain (up by 14% from June 2022 and up by 78% from July 2021). In July 2022, supply decreased in Spain (–62%), and increased in both France and Italy (+699% and +14%, respectively), compared to the previous year. Volumes sold in France peaked from October to April/May when is the main fishing campaign of scallop in Normandy. In Italy supply seemed to peak from April/May to July, and additionally from September/October to November/December. Volumes sold in Spain peaked from November to February. Over the past three years, prices showed a stable trend in all surveyed countries, while at the same time supply went up in all three markets.

[6] In France and Spain MCS scallop inlcudes mainly great Atlantic scallop, and queen scallop, in Italy great Mediterranean scallop.

1.5. Commodity group of the month: salmonids[7]

Figure 16. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES[8], AUGUST 2019 – JULY 2022**



In July 2022, out of the 10 CGs in the countries monitored by EUMOFA[9] the "**salmonids**" commodity group (CG[10]) recorded the 10th highest value and volume. In the reporting countries covered by the EUMOFA database, first sales of "salmonids" in July 2022 totalled a value of EUR 111.000 and a volume of 28 tonnes, representing a 5% decrease in value and a 60% decrease in volume compared to July 2021. In the past 36 months, the highest first-sales value of salmonids was registered at EUR 109.000 in July 2021.

Salmonids includes three main commercial species (MCS): salmon, trout, and other salmonids*[11].

At the Electronic Recording and Reporting System (ERS) level, Atlantic salmon (18%) and sea trout (3%) together accounted for 21% of the total first-sales value for "salmonids" recorded in July 2022.

[7] First-sales data updated on 16.9.2022.
[8] Norway and the UK excluded from the analyses.
[9] More data on commodity groups can be found in Table 1.2 of the Annex.
[10] Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies
[11] EUMOFA aggregation for species (Metadata 2, Annex 3: *http://eumofa.eu/supply-balance-and-other-methodologies*

1.6. Focus on Atlantic salmon

Atlantic salmon (*Salmo salar*) is an anadromous species belonging to the Salmonidae family. Atlantic salmon occupies a depth range of 0-210 m but is usually found between 10 and 23 m. Juvenile salmon remain in freshwater for 1 to 6 years, then migrate to coastal marine waters or even to open oceans where they spend 1 to 4 years before returning to freshwater for spawning. Adults inhabit cooler waters with strong to moderate flow. Most Atlantic salmon populations depend mostly or exclusively on stocking due to degradation of environmental conditions. Fishing pressure on wild stocks has decreased due to intensive farming. Farmed salmon escape in large numbers, move to rivers and hybridize with wild stocks.[12]

Atlantic salmon has a wide area of distribution: it is found in the North Atlantic Ocean in temperate and arctic zones in the northern hemisphere, in the western Atlantic from northern Quebec, Canada, to Connecticut and New York, USA, while in the eastern Atlantic in the basins of the White Sea and Barents Sea, through north-eastern Europe to the Baltic Sea and North Sea basins, including Iceland. Landlocked stocks are present in North America. The species was introduced to New Zealand, Chile, southern Argentina as well as Australia.

In Annex VIII of Regulation (EU) 2019/1241 the minimum conservation reference size for *Salmo salar* for the Baltic Sea is specified as 60 cm in Subdivisions 22-30 and 32, while in Subdivision 31 it is 50 cm. Directed fishing for salmon is prohibited from 1 June to 15 September each year in waters of Subdivisions 22-31, and from 15 June to 30 September in Subdivision 32.[13]

Commercial fishing in rivers used to be economically very important, but in most countries it has given way to the much more profitable recreational angling and sport fishing for salmon, the economic value of which can be up to 30 times higher. Atlantic salmon is marketed fresh, dried or salted, smoked and frozen, while it can be eaten steamed, fried, broiled, microwaved and baked.

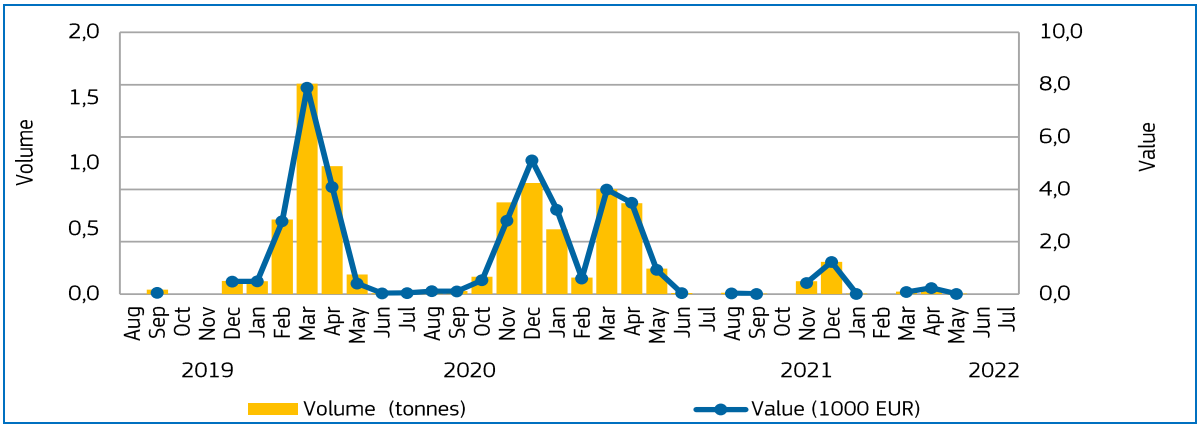
Selected countries

Table 15. **COMPARISON OF ATLANTIC SALMON FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "SALMONIDS" IN SELECTED COUNTRIES**

Atlantic salmon		Changes in Atlantic salmon first sales Jan-Jul 2022 (%)		Contribution of Atlantic salmon to total "salmonids" first sales in July 2022 (%)	Principal places of sale in Jan-Jul 2022 in terms of first-sales value
		Compared to Jan-Jul 2021	Compared to Jan-Jul 2020		
Latvia	**Value**	-97%	-98%	0%.	Liepaja, Jurmalciems, Pavilosta
	Volume	-97%	-98%	0%	
Lithuania	**Value**	-98%	-96%	0%	Klaipėda, Nida.
	Volume	-99%	-97%	0%	
Portugal	**Value**	-17%	-57%	0,1%	Aveiro, Viana do Castelo.
	Volume	-15%	-58%	0,3%	

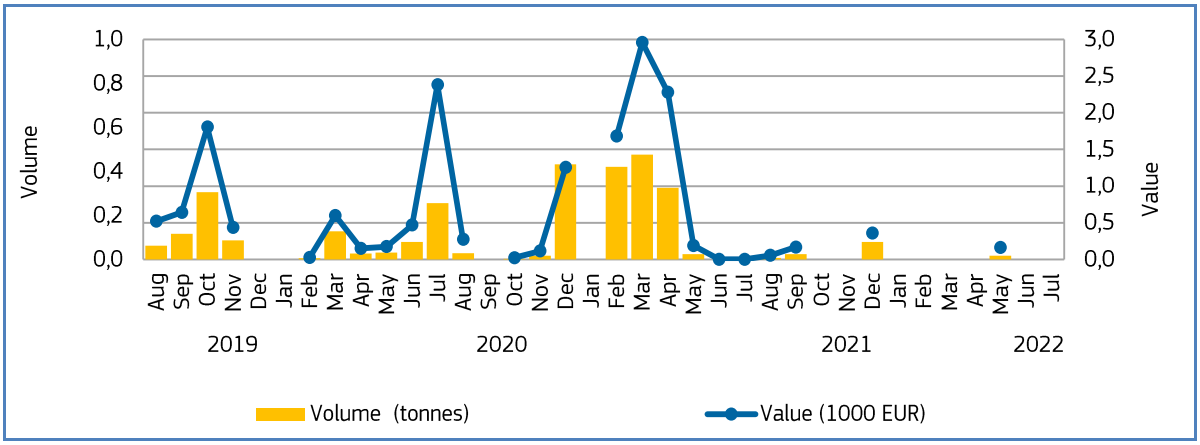
[12] https://www.fishbase.se/summary/salmo-salar.html
[13] Regulation (EU) 2019/1241: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32019R1241&qid=1663680146525

Figure 17. **ATLANTIC SALMON: FIRST SALES IN LATVIA, AUGUST 2019 – JULY 2022**



Over the past 36 months, the highest first-sales value of Atlantic salmon in **Latvia** was in March 2020, when 1,6 tonnes were sold for approximately EUR 8.000. In general, first sales fluctuate depending on availability of quota and EU related management measures[14] as well as national restrictions. As regards sales of species from Commodity group "salmonids" sold in July 2022, there were 8 kg of European whitefish.

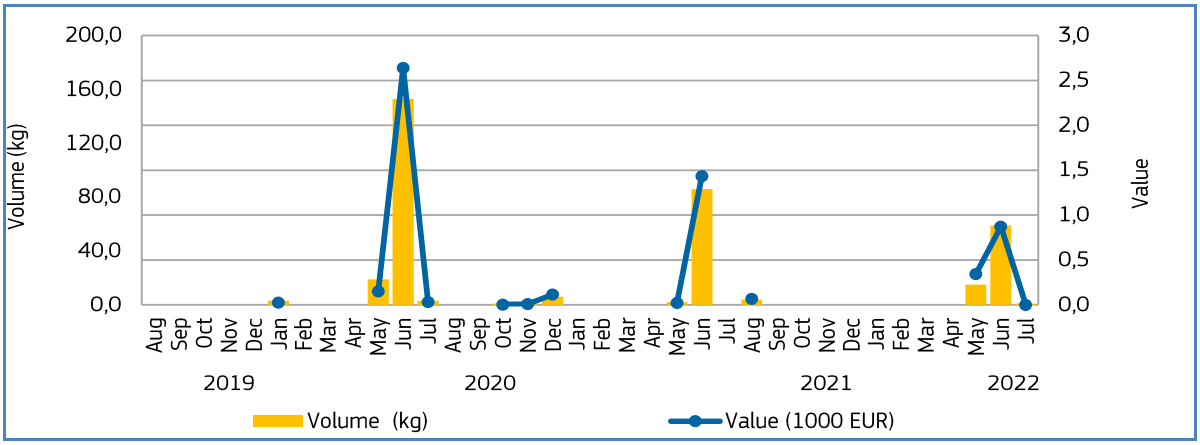
Figure 18. **ATLANTIC SALMON: FIRST SALES IN LITHUANIA, AUGUST 2019 – JULY 2022**



In July 2022, there were no first sales of salmonids in **Lithuania**. Over the past 36 months**,** the highest first-sales value and volume of Atlantic salmon in Lithuania were in March 2021, when 477 kg were sold for approximately EUR 3.000. The Atlantic salmon fishery has no major economic importance in terms of value. In 2022, the Atlantic salmon quota is set exclusively for by-catches, while directed fisheries are not permitted except during May 1 to August 31 as stated in Council Regulation (EU) 2021/1888[15].

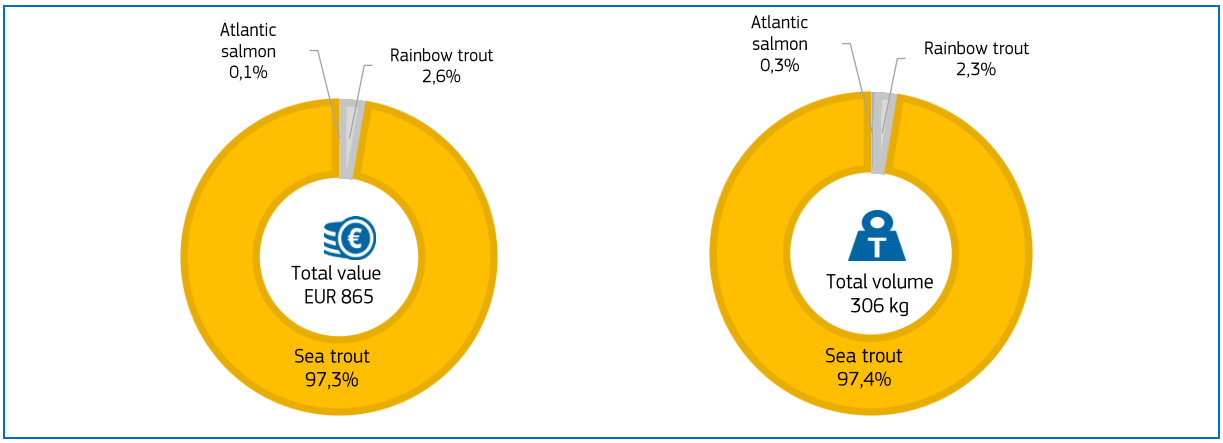
[14] COUNCIL REGULATION (EU) 2021/1888 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32021R1888
[15] Council Regulation (EU) 2021/1888 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32021R1888

Figure 19. **ATLANTIC SALMON: FIRST SALES IN PORTUGAL, AUGUST 2019 – JULY 2022**



In **Portugal**, salmon occurs in the rivers of the northernmost region (Minho): in the Lima River, to the south and in the Minho to the north. There are no targeted commercial fisheries for salmon in Portuguese waters. All catches of wild salmon by professional fisherman are as by-catch using gillnetters for lamprey and shad[16]. Over the past 36 months, the highest first-sales value of Atlantic salmon in Portugal was in June 2020, when 153 kg were sold for approx. EUR 2.600. In general, first sales in Portugal are low, usually in May and June, but also in other months in minor quantities. Overall, first sales of Atlantic salmon in Portugal are the lowest among the surveyed countries.

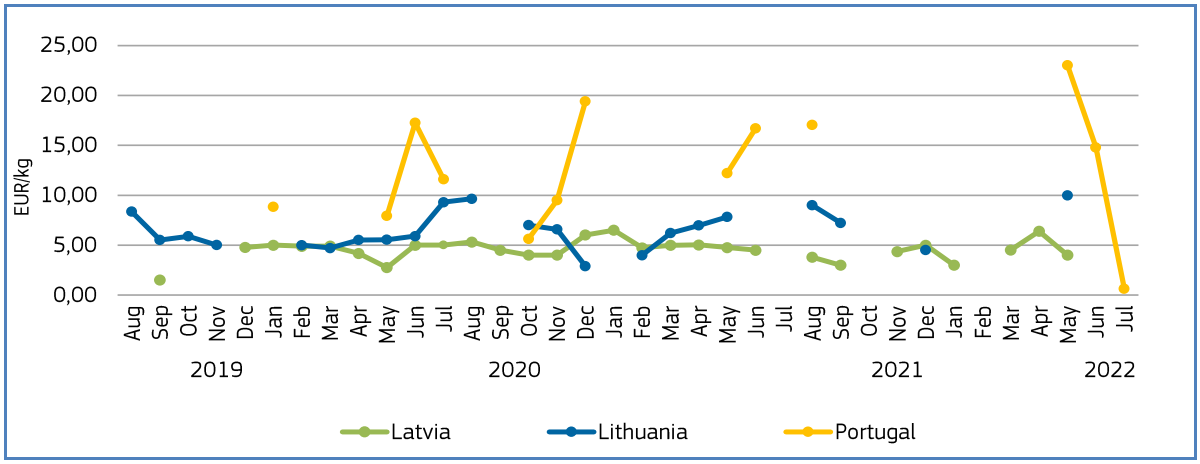
Figure 20. **FIRST SALES: COMPOSITION OF "SALMONIDS" (ERS LEVEL) IN PORTUGAL IN VALUE AND VOLUME, JULY 2022**



[16] https://nasco.int/wp-content/uploads/2021/11/IP1906rev2_Revised-Implementation-Plan_EU-Portugal.pdf

Price trends

Figure 21. **ATLANTIC SALMON: FIRST-SALES PRICES IN SELECTED COUNTRIES, AUGUST 2019 – JULY 2022**



Over the 36-month observation period (August 2019 to July 2022), the weighted average first-sales price of Atlantic salmon in **Portugal** was 16,24 EUR/kg, 187% higher than in **Lithuania,** (5,66 EUR/kg) and 232% higher than **Latvia** (4,89 EUR/kg).

In **Latvia,** in July 2022 there were no first sales of Atlantic salmon. Over the past 36 months, the average price ranged from 1,53 EUR/kg for 34 kg in September 2019, to 6,51 EUR/kg for 496 kg in January 2021.

In **Lithuania,** in July 2022 there were no first sales of Atlantic salmon. Over the past 36 months, the average price ranged from 2,89 EUR/kg for 432 kg in December 2020, to 10,00 EUR/kg for 16 kg in May 2022.

In July 2022 in **Portugal,** there was a lack of representative quantity of first sales value and volume for the analyses[17]. During the observed 36-month period, the highest reached average price was recorded in May 2022 when 15 kg were sold for 23,02 EUR/kg.

EUMOFA also covered **Atlantic salmon** in the following *Monthly Highlights*:
First sales: MH 9 2021 (Denmark, Poland, Sweden), MH 5 2019 (Denmark, Poland, Sweden).

[17] In July 2022 there was 1 kg of first sales volume valued at 0,63 EUR/kg.

1.7. Focus on sea trout

Sea trout (*Salmo trutta*) is an anadromous species from the Salmonidae family. The species is found in streams, ponds, rivers and lakes. Individuals spend 1 to 5 years in fresh water and 6 months to 5 years in salt water. Spawning normally takes place more than once. They prefer cold, well-oxygenated upland waters (although their tolerance limits are lower than those of rainbow trout) and favour large streams in the mountainous areas with adequate cover in the form of submerged rocks, undercut banks and overhanging vegetation. Juveniles feed mainly on aquatic and terrestrial insects, while adults feed on molluscs, crustaceans and small fish.[18]

Sea trout can be found both in Europe and Asia: in the Atlantic, North, White and Baltic Sea basins, from Spain to Chosha Bay in Russia. They are also found in Iceland and the northernmost rivers of Great Britain and Scandinavia. They are native in the upper Danube and Volga drainages. The species is widely introduced, though several countries have reported adverse ecological impacts after introduction[19].

Annex VIII of EU Regulation 2019/1241 lays down minimum a conservation reference size of 40 cm for *Salmo trutta* in geographical area subdivisions 22-25 and 29-32, while in subdivisions 26, 27 and 28 it is 50 cm. The same fishing restrictions apply to both sea trout and Atlantic salmon.[20]

Sea trout is marketed fresh and smoked, while it can be consumed fried, broiled, boiled, microwaved and baked.

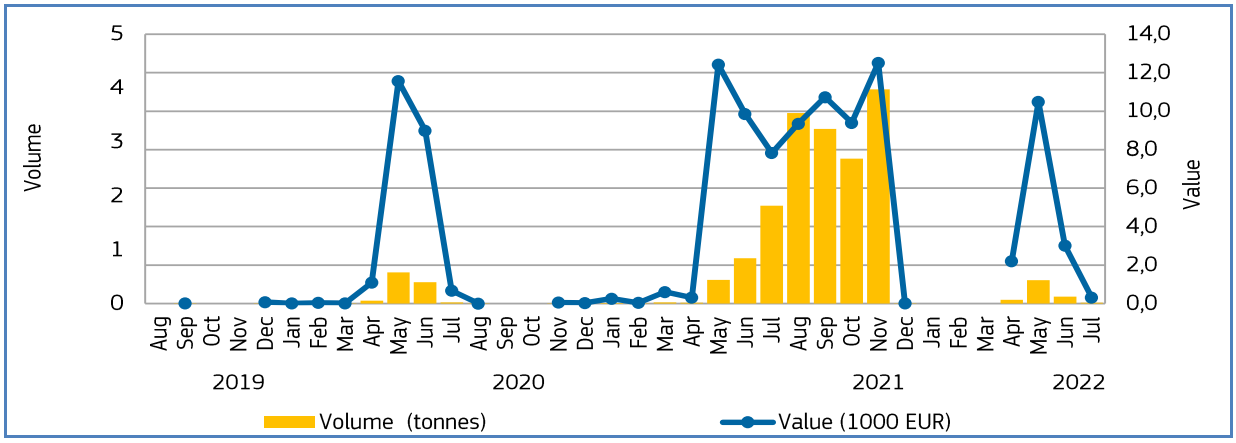
Selected countries

Table 16. **COMPARISON OF SEA TROUT FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "SALMONIDS" IN SELECTED COUNTRIES**

Sea trout		Changes in sea trout first sales Jan-Jul 2022 (%)		Contribution of sea trout to total "salmonids" first sales in July 2022 (%)	Principal places of sale in Jan-Jul 2022 in terms of first-sales value
		Compared to Jan-Jul 2021	Compared to Jan-Jul 2020		
France	**Value**	-49%	-28%	5%	St Jean-de-Luz, Guilvinec, Brest.
	Volume	-79%	-39%	12%	
Lithuania	**Value**	-94%	-92%	0%	Nida, Palanga.
	Volume	-85%	-80%	0%	
Portugal	**Value**	-99%	+61%	97,3%	Viana do Castelo, Póvoa de Varzim.
	Volume	+189%	+46%	97,4%	

[18] https://www.fishbase.se/summary/Salmo-trutta.html
[19] https://www.fishbase.se/summary/Salmo-trutta.html
[20] Regulation (EU) 2019/1241: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32019R1241&qid=1663683751857

Figure 22. **SEA TROUT: FIRST SALES IN FRANCE, AUGUST 2019 – JULY 2022**



In **France**, over the observed 36-month period (August 2019-July 2022), the highest first-sales volume of sea trout were in November 2021, where about 4 tonnes were sold for EUR 12,500. Apart from June to November 2021, there were no important first sales in the observed period. The high sales observed in 2021 mostly correspond to farmed sea trout imported from the UK and sold in auctions.

Figure 23. **SALES: COMPOSITION OF "SALMONIDS" (ERS LEVEL) IN FRANCE IN VALUE AND VOLUME, JULY 2022**

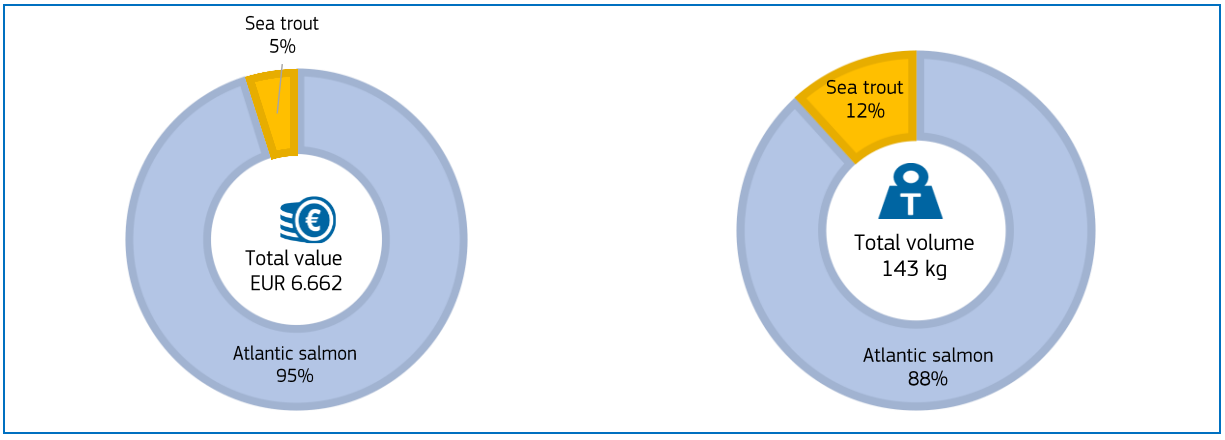
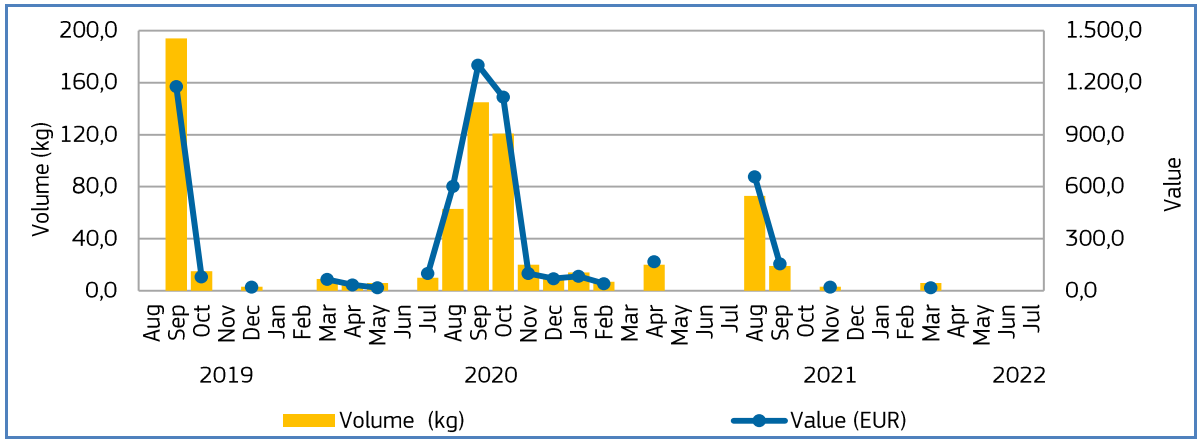


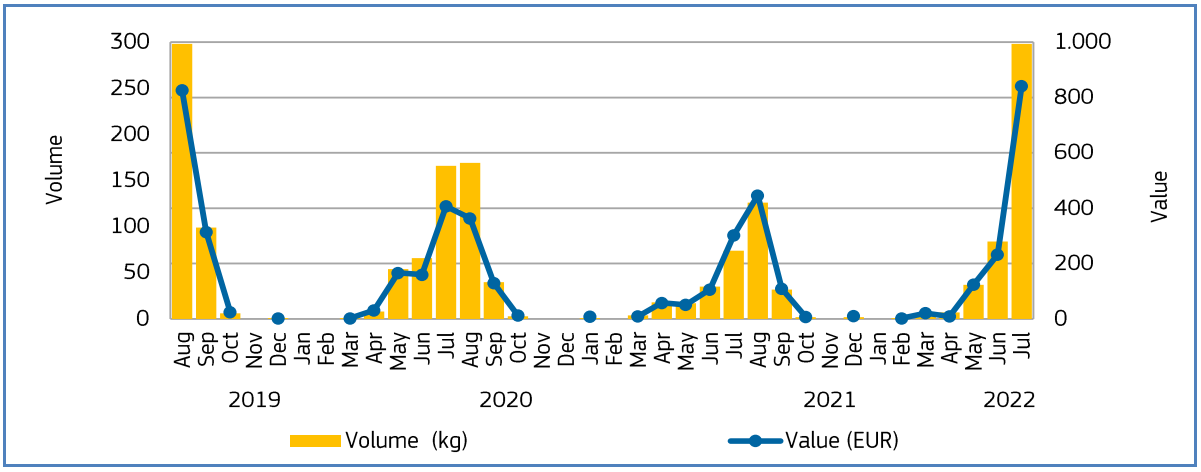
Figure 24. **SEA TROUT: FIRST SALES IN LITHUANIA, AUGUST 2019 – JULY 2022**



In July 2022, there were no first sales of salmonids in Lithuania.

In the 36-month observation period in **Lithuania**, first sales volume was highest in September 2019, when 194 kg tonnes were sold for approx. EUR 1.200. In general, first sales were reported during late summer. Apart from 6 kg reported in March, there were no more first sales of sea trout in 2022 due to the EU ban on direct fishing for sea trout beyond four nautical miles in Baltic Sea subdivisions 22-32 from 1 January to 31 December 2022[21].

Figure 25. **SEA TROUT: FIRST SALES IN PORTUGAL, AUGUST 2019 – JULY 2022**

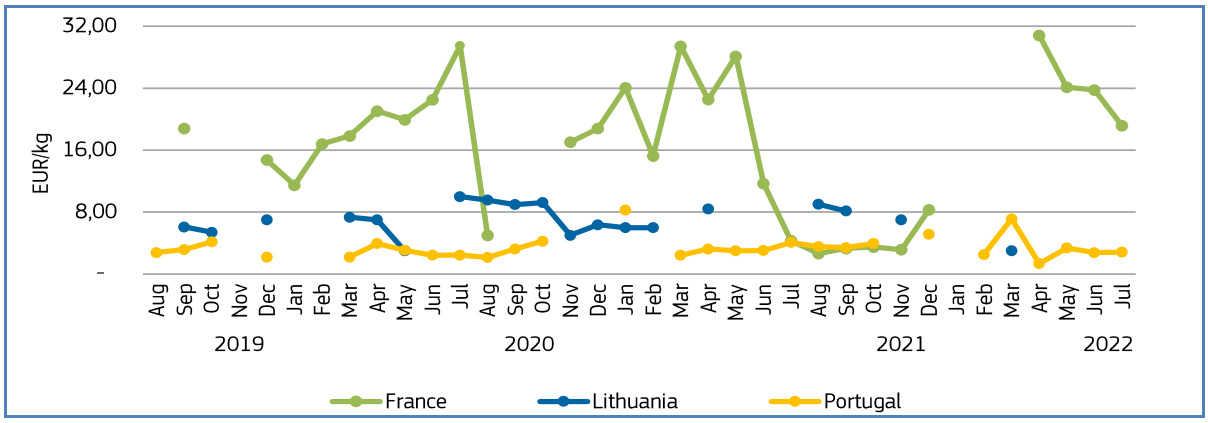


Over the past 36 months in **Portugal**, the highest first sales were recorded in summer. In the observed period volume ranged from 1 kg in December 2019 to 298 kg in August 2019 and July 2022. There were minor or zero sales from October to March in each observed year.

[21] Council Regulation (EU) 2021/1888 (Article 10) https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32021R1888

Price trend

Figure 26. **SEA TROUT: FIRST-SALES PRICES IN SELECTED COUNTRIES, AUGUST 2019 – JULY 2022**



Over the 36-month observation period (August 2019 to July 2022), the weighted average first-sales price of sea trout in **Lithuania** was 7,84 EUR/kg, 28% higher than in **France,** (6,11 EUR/kg) and 171% higher than in **Portugal** (2,89 EUR/kg).

In **France** in July 2022, the average first-sales price of sea trout (19,15 EUR/kg) increased by 345% compared to July 2021 and decreased by 35% compared to July 2020. The lowest average price was recorded in August 2021 at 2,64 EUR/kg for 3,5 tonnes, while the highest average price of 30,81 EUR/kg for 0,1 tonnes was recorded in April 2022.

In **Lithuania** in July 2022, there were no first sales of sea trout. The lowest price in the past 36 months was recorded in May 2020 and March 2022 at 3,00 EUR/kg for as little as 6 kg. The highest price (10,00 EUR/kg for 10 kg) was recorded in July 2020.

In July 2022 in **Portugal**, the average first-sales price of sea trout was 2,82 EUR/kg, 31% lower than July 2021 and 15% higher than July 2020. The lowest average price was recorded in April 2022 at 1,36 EUR/kg for 7 kg. The highest average price of 8,28 EUR/kg for 1 kg was recorded in January 2021.

EUMOFA also covered **sea trout** in the following *Monthly Highlights*:
First sales: MH 9 2020 (Denmark, Estonia, Poland), MH 5 2019 (Denmark, France, Poland).

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 "salmonids", and the featured species are frozen Pacific salmon from the United States, fresh or chilled fillets of Pacific, Atlantic, and Danube salmon from Norway, and smoked trout from Turkey. The three randomly selected species this month are fresh or chilled coalfish from Norway, frozen tilapia from China, and frozen fillets of cod from Iceland.

Data analysed in the section "Extra-EU imports" are extracted from EUMOFA, collected from the European Commission[22].

Table 17. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THE THREE MOST IMPORTED FISHERIES AND AQUACULTURE PRODUCTS INTO THE EU**

Extra-EU Imports		Week 35/2022	Preceding 4-week average	Week 35/2021	Notes
Fresh whole **Atlantic salmon** imported from **Norway** (*Salmo salar*, CN code 03021400)	**Price (EUR/kg)**	6,38	6,80 (–6%)	5,15 (+24%)	Since week one of 2022 prices showed a stable trend, as they had done over the past three years. Prices ranged from 4,32 EUR/kg (week 44 of 2020) to 11,43 EUR/kg (week 16 of 2022), the highest observed in the past three years.
	Volume (tonnes)	19.564	15.307 (+28%)	17.001 (+15%)	Volumes ranged from 5.672 tonnes (week 15 of 2022) to 19.564 tonnes (week 35 of 2022) and had a downward trend over the past three years. Since week one of 2022 weekly volumes showed an upward trend.
Frozen **Alaska pollock** fillets imported from **China** (*Theragra chalcogramma*, CN code 03047500)	**Price (EUR/kg)**	3,85	3,75 (+3%)	2,68 (+44%)	Over the past three years, including 2022, weekly prices showed a stable trend. Prices ranged from 2,26 EUR/kg (week 52 of 2020) to 3,85 EUR/kg (week 35 of 2022).
	Volume (tonnes)	2.616	2.828 (–7%)	3.120 (–16%)	Weekly volumes fluctuated from 345 tonnes (week 52 of 2019) to 5.433 tonnes (week one of 2020) and showed a downward trend over the past three years. Since the beginning of 2022 volumes showed an upward trend.
Frozen **tropical shrimp** imported from **Ecuador** (genus *Penaeus*, CN code 03061792)	**Price (EUR/kg)**	6,58	6,08 (8%)	5,96 (+11%)	Weekly prices were stable in 2022 and remained stable over the past three years. Prices ranged from 4,27 EUR/kg (week 38 of 2020) to 6,58 EUR/kg (week 35 of 2022).
	Volume (tonnes)	1.649	2.662 (–38%)	1.963 (–16%)	Volumes showed an upward trend in 2022, consistent with the trend over the past three years. Weekly volumes fluctuated from 713 tonnes (week six of 2020) to 4.925 tonnes (week 33 of 2021).

[22] Last update: 21.09.2022

Figure 27. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY, 2019 – 2022**

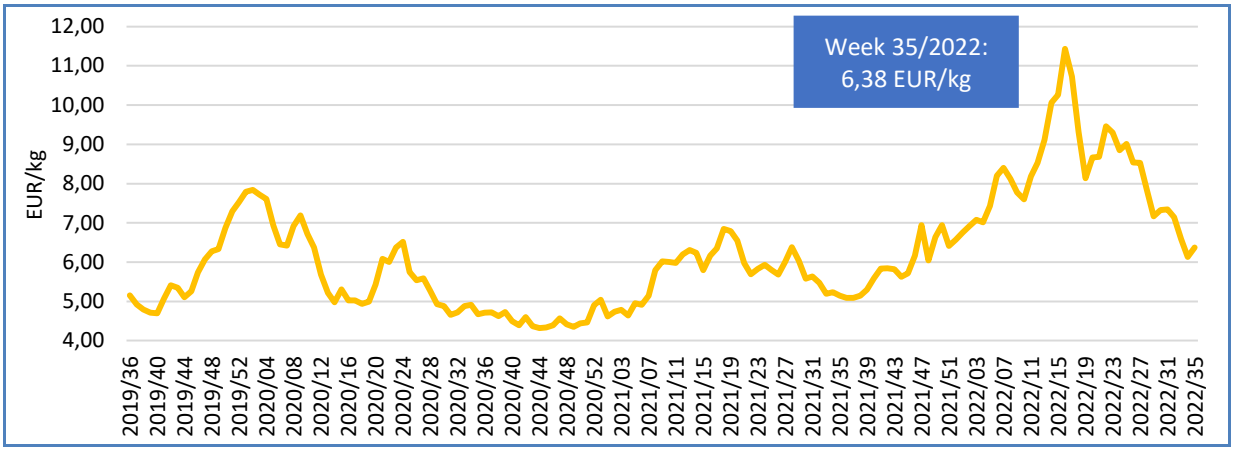


Figure 28. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2019 – 2022**

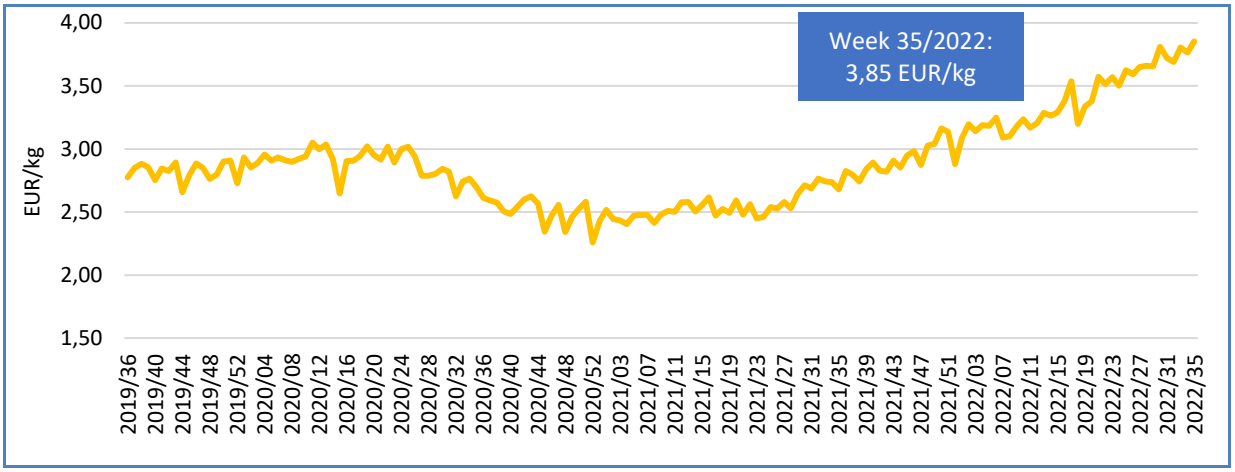


Figure 29. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2019 – 2022**

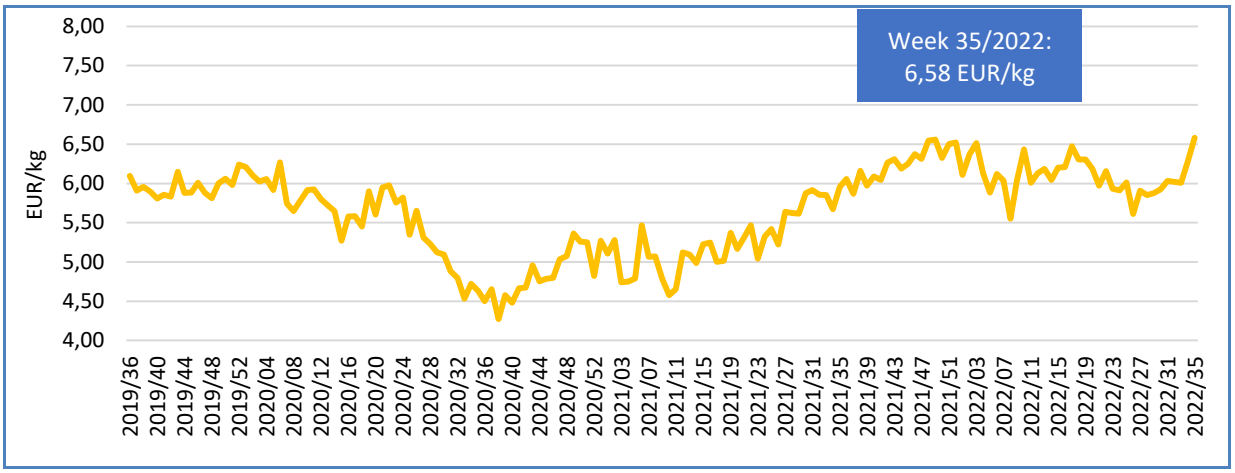


Table 18. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 35/2022	Preceding 4-week average	Week 35/2021	Notes
Frozen **Pacific salmon** (excl. sockeye salmon "red salmon") imported from the **United States** (CN code 03031200)	**Price (EUR/kg)**	4,63	6,87* (–33%)	10,44 (–56%)	Prices followed a stable trend over the past three years. Prices fluctuated from 2,14 EUR/kg (week 18 of 2021) to 21,70 EUR/kg (week 37 of 2021). 76% of the weekly prices were less than 6,00 EUR/kg.
	Volume (tonnes)	22	2* (+1.134%)	23 (–5%)	Volumes followed a downward trend over the past three years, with high fluctuations in supply from 0,023 tonnes (week 16 of 2021) to 347 tonnes (week 44 of 2019). 64% of the weekly supply was less than 100 tonnes.
Fresh or chilled fillets of **Pacific**, **Atlantic**, and **Danube salmon** imported from **Norway** (*Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou, Oncorhynchus rhodurus, Salmo salar, Hucho hucho*, CN code 03044100)	**Price (EUR/kg)**	9,67	10,06 (–4%)	8,12 (+19%)	A stable trend from 2019 to 2022. Prices fluctuated from 6,76 EUR/kg (week 45 of 2020) to 13,33 EUR/kg (week 18 of 2022). 56% of the weekly prices were between 8,00 and 9,00 EUR/kg.
	Volume (tonnes)	1.197	1.115 (+7%)	996 (+20%)	High fluctuations in supply from 2019 to 2022, varying from 406 tonnes (week 52 of 2020) to 1.599 tonnes (week 12 of 2021). Overall upward trend. 57% of the weekly volumes were less than 1.000 tonnes.
Smoked **trout**, incl. fillets (excl. offal) imported from **Turkey** (*Salmo trutta, Oncorhynchus mykiss, Oncorhynchus clarki, Oncorhynchus aguabonita, Oncorhynchus gilae, Oncorhynchus apache, Oncorhynchus chrysogaster*, CN code 03054300)	**Price (EUR/kg)**	8,85	8,89 (-0,4%)	7,98 (+11%)	A stable trend over the past three years. Prices ranged from 7,00 EUR/kg (week one of 2020) to 9,23 EUR/kg (week 34 of 2022). 78% of the weekly prices were less than 8,00 EUR/kg.
	Volume (tonnes)	54	68 (–21%)	77 (–30%)	A downward trend over the past three years. Fluctuations in supply from 29 tonnes (week 15 of 2022) to 127 tonnes (week 50 of 2020). 89% of the weekly volumes were less than 100 tonnes.

**Data refers to week 31 of 2022. There is no data for weeks 32,33, and 34*

Figure 30. **IMPORT PRICE OF FROZEN PACIFIC SALMON FROM THE UNITED STATES, 2019 – 2022**

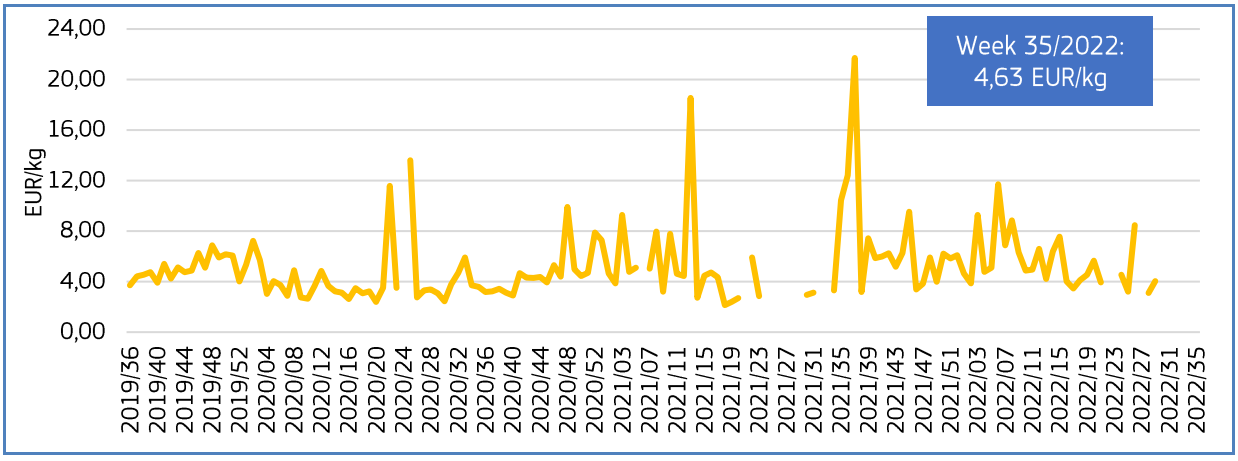


Figure 31. **IMPORT PRICE OF FRESH OR CHILLED FILLETS OF PACIFIC, ATLANTIC AND DANUBE SALMON FROM NORWAY, 2019 - 2022**

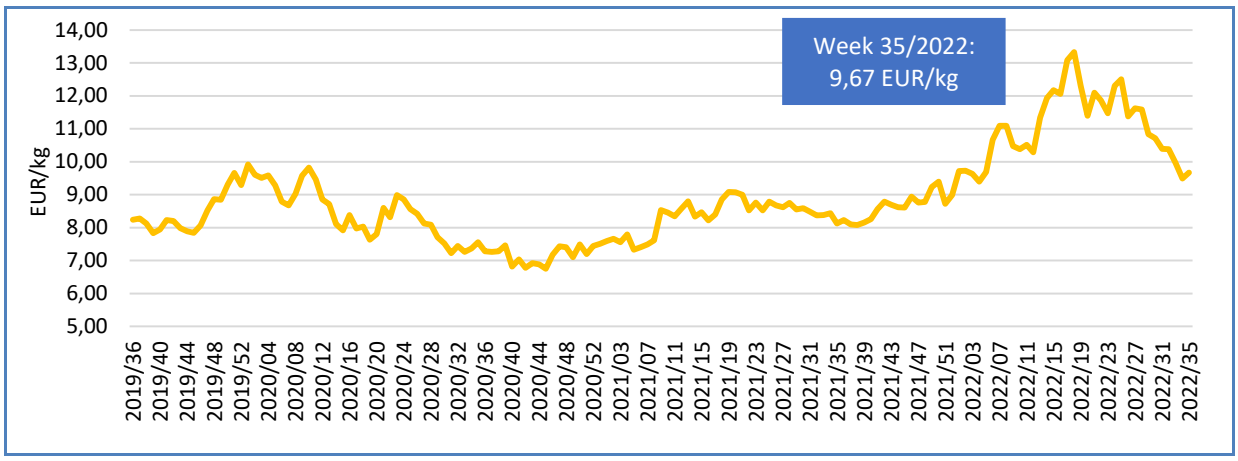
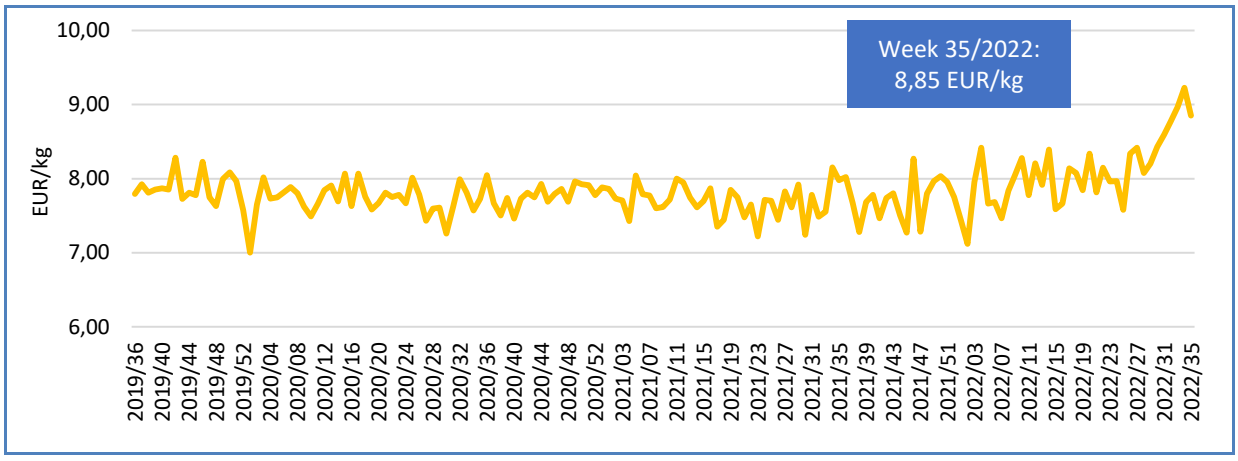


Figure 32. **IMPORT PRICE OF SMOKED TROUT FROM TURKEY, 2019 - 2022**



Volume of frozen **Pacific salmon** from the **United States** exhibited a downward trend since week 1 2022. Price remained stable ranging from 3,09 to 11,70 EUR/kg, with weekly supply from 0,02 to 1.011 tonnes.

Since the beginning of the year, price of fresh or chilled fillets of **Pacific**, **Atlantic** and **Danube salmon** from **Norway** had a stable trend. At the same time, volume showed a downward trend. Price ranged from 9,39 to 13,33 EUR/kg, and supply from 658 to 1.369 tonnes.

Since week 1 2022 price of smoked trout from Turkey showed a stable trend, while at the same time weekly supply went up. Price ranged from 7,12 to 9,23 EUR/kg, and volume from 29 to 115 tonnes.

Table 19. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF EU IMPORTS OF THREE OTHER FISHERIES AND AQUACULTURE PRODUCTS RELEVANT TO THE EU MARKET**

Extra-EU Imports		Week 35/2022	Preceding 4-week average	Week 35/2021	Notes
Fresh or chilled **coalfish** imported from **Norway** (*Pollachius virens*, CN code 03025300)	**Price (EUR/kg)**	2,42	2,20 (+10%)	1,65 (+47%)	A stable trend from 2019 to 2022. Prices fluctuated from 0,92 EUR/kg (week 34 of 2020) to 2,60 EUR/kg (week 32 of 2022). 82% of the weekly prices were between 1,00 EUR/kg and 2,00 EUR/kg.
	Volume (tonnes)	315	334 (–6%)	356 (–11%)	High fluctuations in supply, varying from 7 tonnes (week 52 of 2020) to 870 tonnes (week one of 2022). Overall downward trend. 64% of the weekly supply was higher than 300 tonnes.
Frozen **tilapia** imported from **China** (*Oreochromis* spp., CN code 03032300)	**Price (EUR/kg)**	2,85*	2,80** (+2%)	2,00*** (0%)	Stable trend over the past three years. Price fluctuations, varying from 1,17 EUR/kg (week 47 of 2020) to 2,95 EUR/kg (week 24 of 2022). 70% of the weekly prices were less than 2,00 EUR/kg.
	Volume (tonnes)	82*	87** (-6%)	97*** (-15%)	An upward trend over the past three years. Fluctuations in supply from 16 tonnes (week 13 of 2020) to 525 tonnes (week six of 2022). 81% of the weekly supply was higher than 100 tonnes.
Frozen fillets of **cod** imported from **Iceland** (*Gadus morhua, Gadus ogac*, CN code 03047190)	**Price (EUR/kg)**	7,08	7,20 (–2%)	5,81 (+22%)	A stable trend from 2019 to 2022. Prices ranged from 4,25 EUR/kg (week 32 of 2022) to 10,00 EUR/kg (week 34 of 2022). 87% of the weekly prices were less than 7,00 EUR/kg.
	Volume (tonnes)	102	63 (+63%)	273 (–63%)	From 2019 to 2022 weekly supply fluctuated from 29 tonnes (week 32 of 2022) to 1.021 tonnes (week 10 of 2020). Overall downward trend. 61% of the weekly volumes were between 200 and 500 tonnes.

Data refers to week 34 of 2022 (the most recent available). **Data refers to weeks 30 to 32 of 2022.*Data refers to week 34 of 2021.*

Figure 33. **IMPORT PRICE OF FRESH OR CHILLED COALFISH FROM NORWAY, 2019 – 2022**

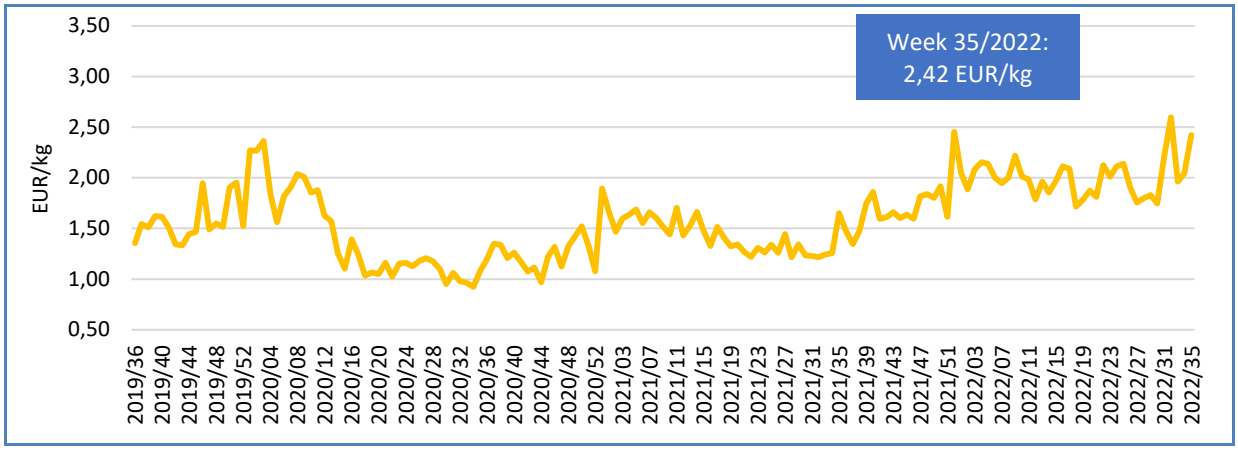


Figure 34. **IMPORT PRICE OF FROZEN TILAPIA FROM CHINA, 2019 - 2022**

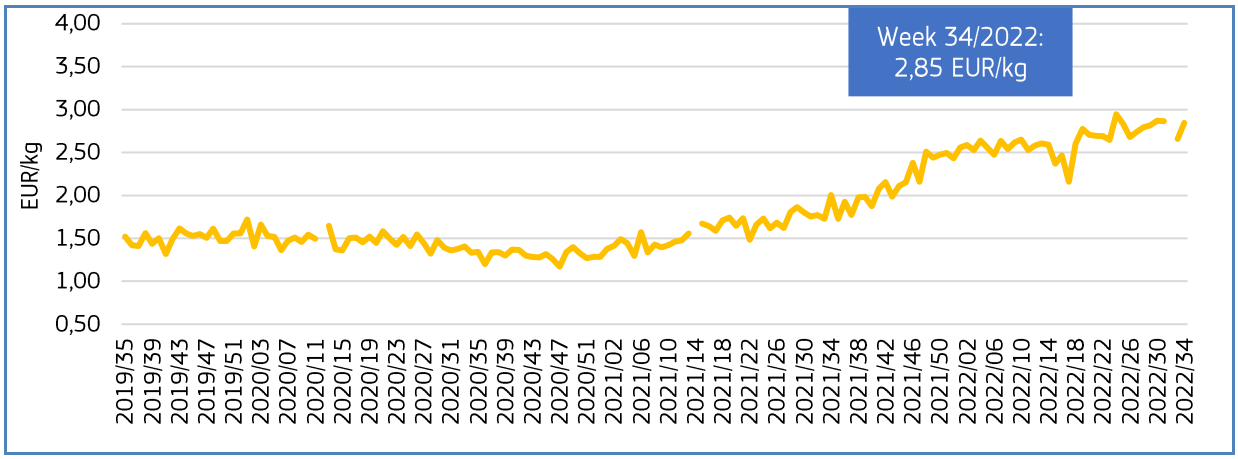
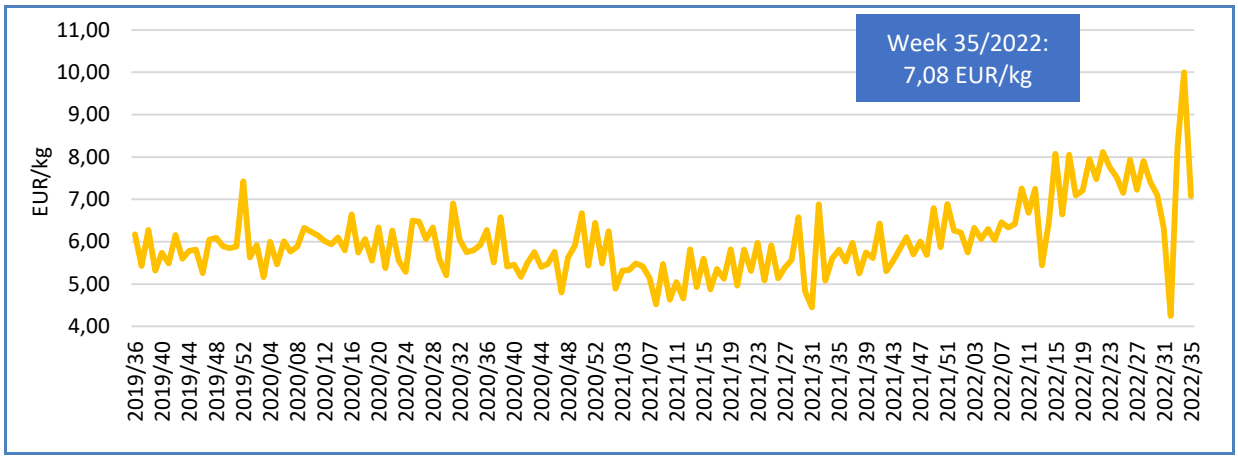


Figure 35. **IMPORT PRICE OF FROZEN FILLETS OF COD FROM ICELAND, 2019 - 2022**



In 2022, the price of fresh or chilled **coalfish** from **Norway** showed a stable trend, while weekly supply went down. Price ranged from 1,72 to 2,60 EUR/kg and volumes from 89 to 870 tonnes.

The price of frozen **tilapia** from **China** had a stable trend in 2022. At the same time, weekly volumes went down. Prices ranged from 2,00 to 2,95 EUR/kg and volume from 42 to 525 tonnes.

Since the beginning of the year, the price of frozen fillets of **cod** from **Iceland** had a stable trend. At the same time weekly supply went down. The price ranged from 4,25 to 10,00 EUR/kg and supply from 29 to 745 tonnes.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[23].

In July 2022 compared to July 2021, household consumption of fresh fisheries and aquaculture products decreased in volume in most Member States analysed, except for Hungary where it increased slightly by 1% and in Denmark where it remained the same. A similar decrease was also observed in value. Only in Hungary did it increase by 17% and in Ireland by 2%, while in Denmark it remained unchanged.

Highest falls in household consumption were observed in Sweden, where herring (volume -68%, value -72%) and salmonids (volume -61%, value -46%) were the main contributors to the observed decrease.

Table 20. **JULY OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)**

Country	Per capita consumption 2019* (live weight equivalent, LWE) kg/capita/year	July 2020		July 2021		June 2021		July 2022		Change from July 2021 to July 2022	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	42,56	1.102	18,62	961	17,63	935	18,40	962	17,62	0%	0%
Germany	13,08	6.505	96,61	6.333	93,83	3.898	68,52	3.997	69,19	-37%	-26%
Hungary	6,28	301	1,97	237	1,50	243	1,80	240	1,76	+1%	+17%
Ireland	25,50	1.082	15,59	893	13,77	1.090	18,08	840	14,02	-6%	+2%
Italy	31,21	23.537	242,78	22.047	238,10	24.493	281,36	20.763	226,82	-6%	-5%
Netherlands	20,60	3.424	48,36	3.266	47,00	3.242	61,89	2.713	46,37	-17%	-1%
Poland	13,11	3.032	20,77	2.734	19,33	2.520	18,90	2.344	18,43	-14%	-5%
Portugal	59,91	7.137	42,71	6.893	45,91	5.395	37,65	5.396	38,58	-22%	-16%
Spain	46,02	51.083	400,13	46.648	392,20	37.522	338,71	39.721	358,04	-15%	-9%
Sweden	25,16	778	10,06	795	10,76	740	10,38	442	7,74	-44%	-28%

**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/20178/477018/EN_The+EU+fish+market_2021.pdf/*

Over the past three years, the average household consumption of fresh fisheries and aquaculture products in July in both volume and value has been below the annual average in most Member States analysed, apart from Portugal where it was above average (6% and 3%). In the Netherlands, only volume increased above the annual average level (2%).

The most recent weekly consumption data (up to **week 43 of 2022**) are available on the EUMOFA website and can be accessed **here**.

[23] Last update: 20.09.2022

3.2. Shrimp *Crangon* spp.

Habitat: *Crangon* spp. are part of the crustacean family Crangonidae, also known as brown or common shrimp. *Crangon* spp. live near the seabed in shallow estuarine waters or near the coast of marine or slightly brackish waters.[24]
Catch area: : Atlantic coast of Morocco, Black Sea, Mediterranean Sea, Baltic Sea, Atlantic coast of Europe from the White Sea to Portugal.[25]
Production areas in the EU: Belgium, the Netherlands, Germany, Denmark.
Production method: Caught.
Presentation: Whole, peeled.
Preservation: Fresh, frozen.
Ways of preparation: Boiled, grilled.

3.2.1. Overview of household consumption in the Netherlands

The per capita consumption of fish and seafood products of the Netherlands is below the EU average. In 2019, the Netherlands registered 20,60 kg consumption, 14% lower than the EU average of 23,97 kg. See more on EU per capita consumption in Table 20.

During the period January 2019–December 2021, retail prices of shrimp *Crangon* spp. fluctuated around 31,38 EUR/kg in the Netherlands, where a sharp increase in prices was registered between January-July 2022, when the average price of the period reached 39,11 EUR/kg. The retail price of *Crangon* spp. in the period January-July 2022 was 18% higher in the Netherlands than in the same period in 2021. Consumed volume in the period August 2019–July 2022 was 1.739 tonnes. Consumed volume in 2022 from January to July was 207 tonnes, which is 33% lower than the same period in 2021. The high season for shrimp consumption in the Netherlands is in December.

We have covered **shrimp *Crangon* spp.** in previous *Monthly Highlights*:

First Sales: Belgium 4/2022, 2/2019, 10/2017, Denmark 10/2017, 7/2016, France 4/2022, 2/2019, 10/2017, the Netherlands 4/2022, 2/2019, UK 10/2017.

Consumption: the Netherlands 10/2019, 6/2017

Extra-EU imports: Intra-EU Export 11/2016

Topic of the month: Brown shrimp in the EU 10/2020, Brown shrimp in the Netherlands 11-12/2013

[24] https://www.eumofa.eu/documents/20178/327062/MH10+2019+EN..pdf/
[25] https://www.fao.org/fishery/en/aqspecies/3435

Figure 36. **PRICES OF SHRIMP CRANGON SPP. PURCHASED BY DUTCH HOUSEHOLDS**

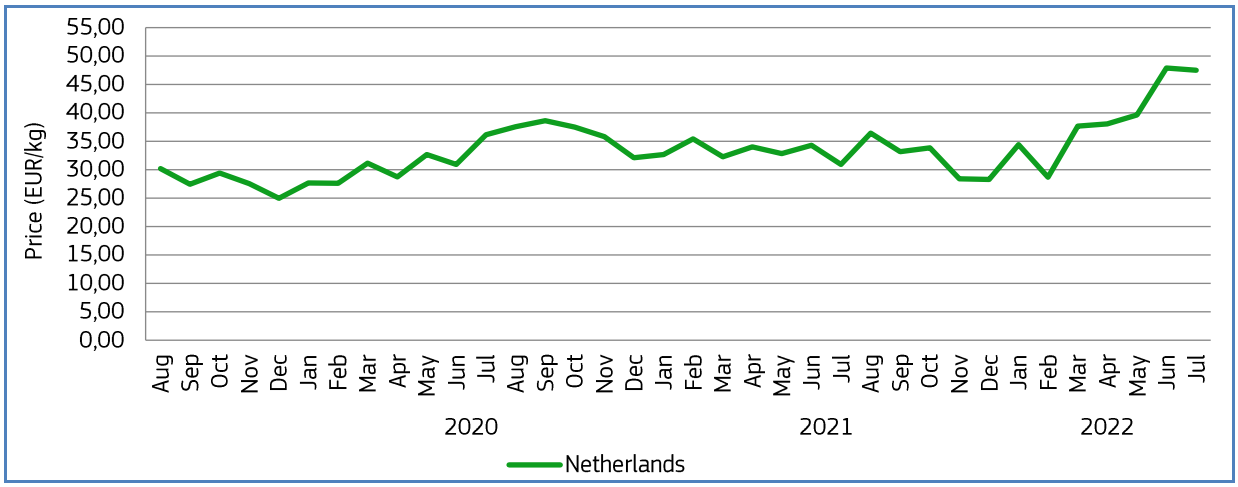
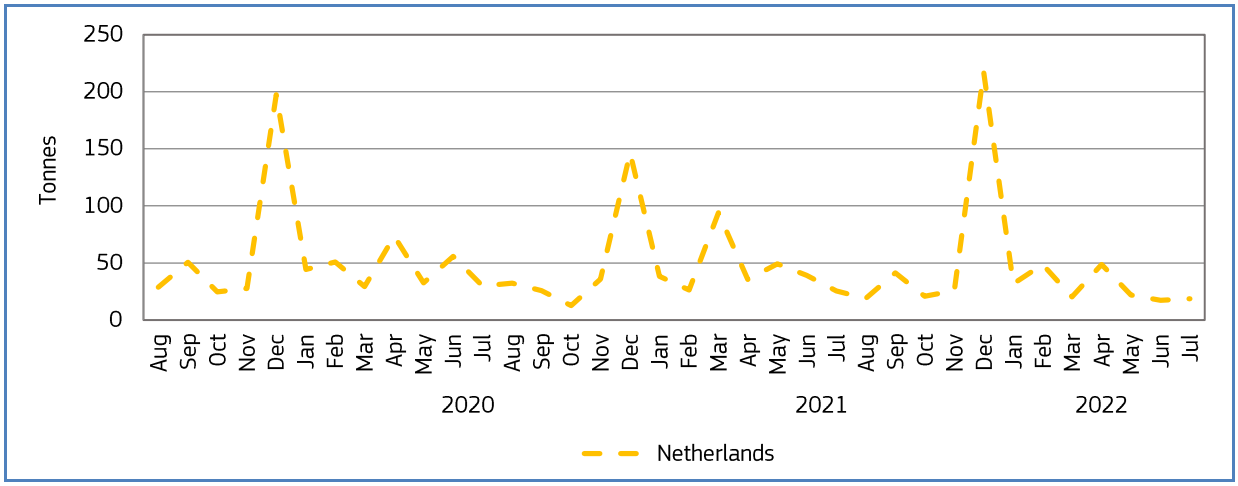


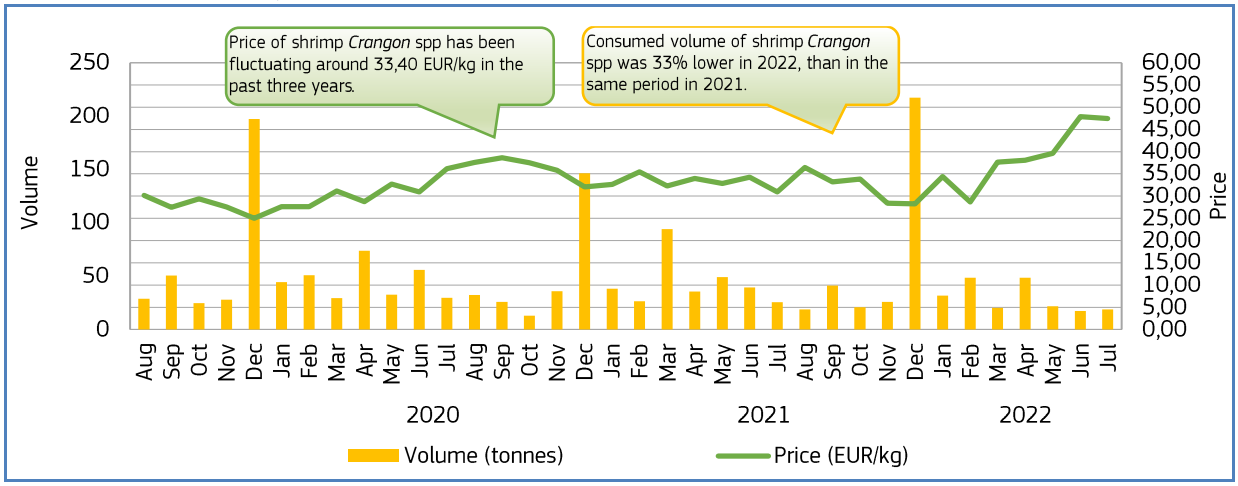
Figure 37. **HOUSEHOLD PURCHASES OF SHRIMP CRANGON SPP. IN THE NETHERLANDS**



3.2.2. Household consumption trends in the Netherlands

Long-term trend (August 2019 to July 2022): Upward trend in price and fluctuating volumes.
Yearly average price: 28,39 EUR/kg (2019), 33,04 EUR/kg (2020), 32,71 EUR/kg (2021).
Yearly consumption: 596 tonnes (2019), 570 tonnes (2020), 632 tonnes (2021).
Short-term trend (January to July 2022): Upward trend in price and downward trend in volume.
Price: 39,11 EUR/kg.
Consumption: 207 tonnes.

Figure 38. **RETAIL PRICE AND VOLUME OF SHRIMP CRANGON SPP. PURCHASED BY HOUSEHOLDS IN THE NETHERLANDS, AUGUST 2019 – JULY 2022**



4. Case study: Monks in the EU

In the period 2016-2020, average annual landings of monks in the EU were around 39.000 tonnes with an average value of 196 million EUR. Both fresh and frozen monk products are imported into the EU. Frozen products are mainly supplied by China, Namibia, South Africa and the UK, while fresh products are predominately imported from the UK and Norway. Spain, Portugal, and Italy import most of the frozen monk products, while France, Spain and Denmark import most of the fresh monk products. Monk stocks have been subject to overexploitation in the past, but the introduction of management plans and TACs, in addition to biomass monitoring and a decline in fishing effort, has ensured that EU monk stocks can be harvested sustainably.

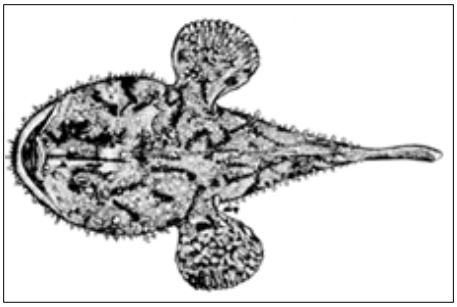
4.1 Biology, resource and exploitation

Biology

Monks, also known as goosefish, anglerfish, frogfish, or sea-devils, are fish in the genus *Lophius* of the family Lophiidae, which consists of seven known species: American angler (*Lophius americanus*), black-bellied angler (*Lophius budegassa*), blackfin goosefish (*Lophius gastrophysus*), yellow goosefish (*Lophius litulon*), white-bellied angler (*Lophius piscatorus*), shortspine African angler (*Lophius vaillanti*), and devil anglerfish (*Lophius vomerinus*)[26]. Six of the species occur along both coasts of the Atlantic Ocean, but only two on them *L. budegassa* and *L. piscatorus* are widely distributed in Europe and are of the greatest commercial interest. These monk species overlap in distribution and range from the southwestern Barents Sea to the Strait of Gibraltar, including the Mediterranean and Black Seas, and along the coasts of Greenland and Iceland[26,28]. The seventh monk species, *L. litulon*, occurs in the northwest Pacific.

Source: Fariña A. C., et al.

Monks are bathydemersal[27] fish occurring from the sublittoral zone to depths of around 1.000 metres[28]. They lie camouflaged on the mud, sand or gravel substrate, waiting for their prey to swim close enough for capture by their large mouths. Invertebrates, such as crustaceans and cephalopods, are an important part of their diet as juveniles, whereas large juveniles and adults mainly eat a variety of pelagic and benthic fish. As opportunistic sedentary feeders, their diets vary with season and abundance of prey species[29].


Source: FAO

Monks have a dorsoventrally flattened morphology, with a wide and cavernous mouth armed with long, pointed teeth. The teeth incline inwards and can be temporarily depressed to ease the passage of prey items, while still preventing escape[30]. Other characteristics include thin skin with no scales and a modified dorsal fin ray (illicium) with a fleshy esca at the end, used to attract prey.

Spawning occurs during spring and takes place at depths between 1.000-1.800 metres (*L. piscatorus*). Eggs spawn in sheets up to 15 m long and 60-90 cm wide. Eggs and larvae are pelagic, while juveniles and adults lead a benthic lifestyle. Females are generally larger than males for all species of monk, with lengths ranging from 110-170 cm for females and 70-130 cm for males. They also generally live longer than males, reaching ages of up to 25 years, while males do not normally live beyond 21 years.

[26] Farina, A. C., et al. (2008), "*Lophius* in the world: a synthesis on the common features and life strategies", *ICES Jour. Mar. Sci.* 65.7.
[27] Living and feeding on the bottom below 200 m.
[28] Ofstad, L. H., et al. (2022), "Horizontal and vertical migration of anglerfish *Lophius piscatorus* in relation to hydrography in Faroese waters", *Front. Mar. Sci.* 9:823066.
[29] Nederaas, K., (2020), www.hi.no/resources/klimastatus-pa-bestander/20211213_Anglerfish_narrative.pdf .
[30] Pethon P., (2019), "Aschehoughs store fiskebok", *Aschehough* 1st edition, ISBN 9788203392191.

Resource, exploitation and management in the EU

In the Atlantic, Mediterranean and Black Sea monks are exploited by commercial fisheries and caught as bycatch in fisheries targeting other demersal species. Monks are mainly caught by bottom trawl (beam and otter) and gillnet, but longline and trammel nets are also used[31]. Catches of monks in European Atlantic waters are regulated by multiannual plans[32] (MAPs). There are three management areas, each regulated by one or several total allowable catches[33] (TACs):

- **Area 1**: North Sea, Rockall and west of Scotland, Skagerrak and Kattegat (ICES subareas 4 and 6, division 3a)[34]
- **Area 2**: Cantabrian Sea and Atlantic Iberian waters (ICES divisions 8.c and 9.a)[35]
- **Area 3**: Celtic Seas and Bay of Biscay (ICES subarea 7, divisions 8.a-b and 8.d)

Management of catches and assessment of stocks is complicated as the two European species (white- and black-bellied angler) are subject to a combined species TAC. This prevents effective monitoring of exploitation rates for each of the species and could lead to overfishing of either species[36]. According to ICES Advice, monk stocks in area 1 and 2 are considered healthy, with good recruitment levels and harvests below maximum sustainable yield[37] (MSY). Most monks caught by the European fleet are fished in these areas, specifically in subarea 7 and divisions 8.a-b, 8.d, and 8.e[38]. There is little historical data available on stock size, recruitment and harvest rate in Area 1, but there are indications that stock size has decreased since 2017 and harvest rate has increased since 2015 according to ICES[39]. TACs regulating the area do not match the stock unit and is lacking for subarea 4 and division 3.a, which means there is a chance for overexploitation of one or both species.

4.2 Fisheries

Monks are not suited as aquaculture species - all production comes from fisheries. Historically, they were caught as bycatch in other demersal fisheries, but overexploitation of species such as cod and halibut also led to overfishing of monks[40]. In recent years, management plans and TACs for monks have been developed, based on new understanding of population dynamics, as a measure to prevent overexploitation.

Catches

In 2020 global production of monks amounted to 91.000 tonnes, which is the lowest production volume of the decade with a 17% reduction compared to the peak year 2017 (Table 21). EU member states contributed with 38% of global production, with France, Spain, and Ireland being the leading producers (19%, 7%, and 3% respectively). Leading producers globally were the UK, South Korea, USA and South Africa, producing 20%, 15%, 9% and 8% respectively.

Over the past decade, monk production in EU Member States has remained stable but increased in several countries outside the EU (UK, USA, and South Korea). EU member states contributed with 41% of total monk production over the past decade, during this period the UK, France and South Korea were the leading producers globally (17%, 22%, and 14% respectively).

Table 21. **TOTAL WORLD CATCHES OF MONKS (volume in tonnes)**

Country	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
UK	15.124	13.336	13.563	15.841	18.163	20.485	20.332	18.610	17.652	17.910
France	19.774	20.610	23.399	22.855	23.138	24.374	24.033	21.651	19.060	17.405
South Korea	15.808	12.090	11.686	12.903	11.888	13.838	15.335	13.448	18.458	13.448

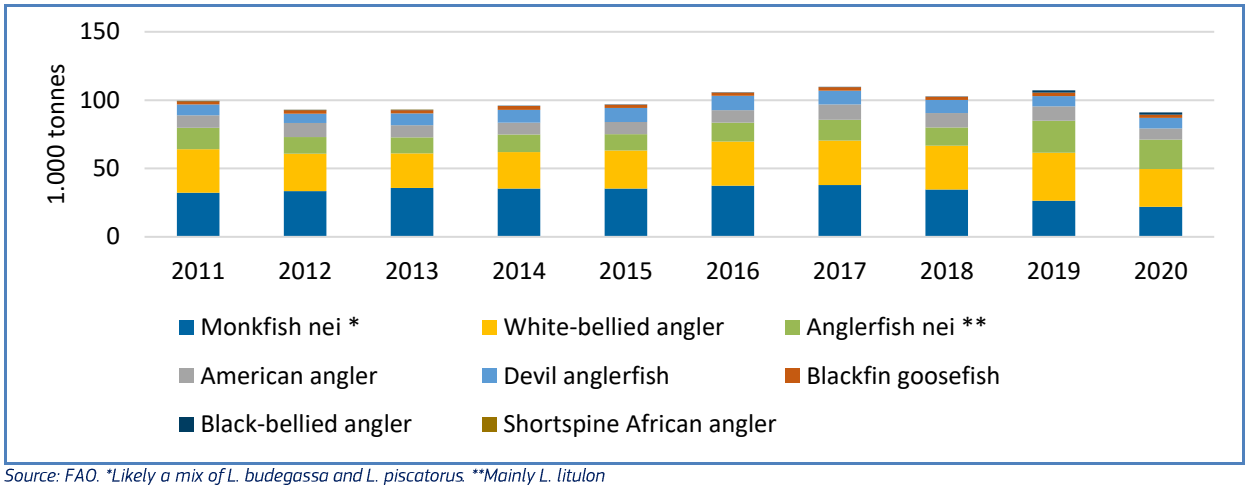
[31] Marine conservation society, (2022), *White monkfish/black-bellied monkfish*, Good Fish Guide, www.mcsuk.org/goodfishguide/species/white-monkfish/
[32] Tool for fisheries management that helps to ensure the sustainable exploitation of fish stocks.
[33] Tool used to establish maximum fishing limits during a certain timeframe for each one of the species controlled by management plans.
[34] Stock assessments in this management area are performed by the working group for the Celtic Seas ecoregion (WGCSE).
[35] ICES, (2022), ICES Advice 2022, *ICES Advice Publications*, Collection, www.doi.org/10.17895/ices.pub.c.5796935.v38
[36] ICES, (2022), ICES Advice 2022, ICES Advice Publications, Collection, www.doi.org/10.17895/ices.pub.c.5796935.v38
[37] The largest annual harvest that a fish stock can produce in the long term.
[38] The Council of the European Union, (2022), Official Journal of the European Union, Council regulation (EU) 2022/515, www.eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2022.104.01.0001.01.ENG
[39] ICES, (2019), Anglerfish (*Lophius budegassa, Lophius piscatorus*) in subareas 4 and 6 and division 3.a. *Report of the ICES Advisory Committee*, ICES Advice 2019, anf.27.3a46. www.doi.org/10.17895/ices.advice.4778
[40] Environmental Defense fund. www.seafood.edf.org/monkfish

USA	8.689	9.758	8.597	8.456	8.623	9.034	10.881	10.414	10.458	8.108
South Africa	7.792	6.766	6.721	6.084	6.668	7.543	8.142	7.319	6.454	6.972
Spain	6.617	6.680	7.274	7.749	7.583	7.782	7.856	7.301	7.419	6.650
Norway	5.693	4.375	3.676	2.319	1.446	2.118	2.480	3.369	4.251	3.398
Ireland	3.794	3.854	3.745	3.935	3.818	4.414	4.216	4.184	4.856	2.941
Brazil	2.412	2.625	2.265	2.735	2.460	2.460	2.460	2.460	2.460	2.460
Denmark	1.378	1.429	1.344	1.444	1.667	2.479	3.093	2.799	2.894	1.997
Others	12.327	11.213	10.593	11.463	11.485	11.256	11.009	11.132	13.203	9.709
Total	**99.408**	**92.736**	**92.863**	**95.784**	**96.939**	**105.783**	**109.837**	**102.687**	**107.165**	**90.998**

Source: FAO.

In the past decade France, the UK and Spain were the main producers of white- and black-bellied angler in the northeast Atlantic, and provided 22%, 17%, and 7% respectively of global production (Table 21). Fisheries in the Mediterranean and Black Sea provided 3% of global production, with Italy, Spain and Greece being the main producers. South Korean fisheries were the main producers of yellow goosefish in the northwest Pacific, which accounted for 14% of global production the past decade. American angler is mainly caught by fisheries from the USA in the northwest Atlantic, while South Africa is the main producer of shortspine African angler in the southeast Atlantic. In the past decade these fisheries contributed with 9% and 7% of global production, respectively.

Figure 39. **TOTAL WORLD CATCHES OF MONKS (volume in 1.000 tonnes)**



*Source: FAO. *Likely a mix of L. budegassa and L. piscatorus. **Mainly L. litulon*

Landings in the EU

Landings of monks in the EU amounted to 37.000 tonnes at a value of 185 million EUR in 2020, an 8% decrease in volume and a 14% decrease in value since 2019. Landing volumes by EU Member States have increased gradually in the past decade, with three countries France, Ireland and Spain accounting for approximately 85% of landing volume and 80% of value. In France and Spain, nearly all monks are landed whole/gutted and live/fresh. About 7% of monks landed in Spain are frozen. Monks in Ireland are also to a large degree (>60%) landed as whole/gutted and live/fresh, whilst more than 35% are landed as "unspecified".

Table 22. **LANDINGS OF MONKS IN THE EU (volume in tonnes, value in EUR 1.000)**

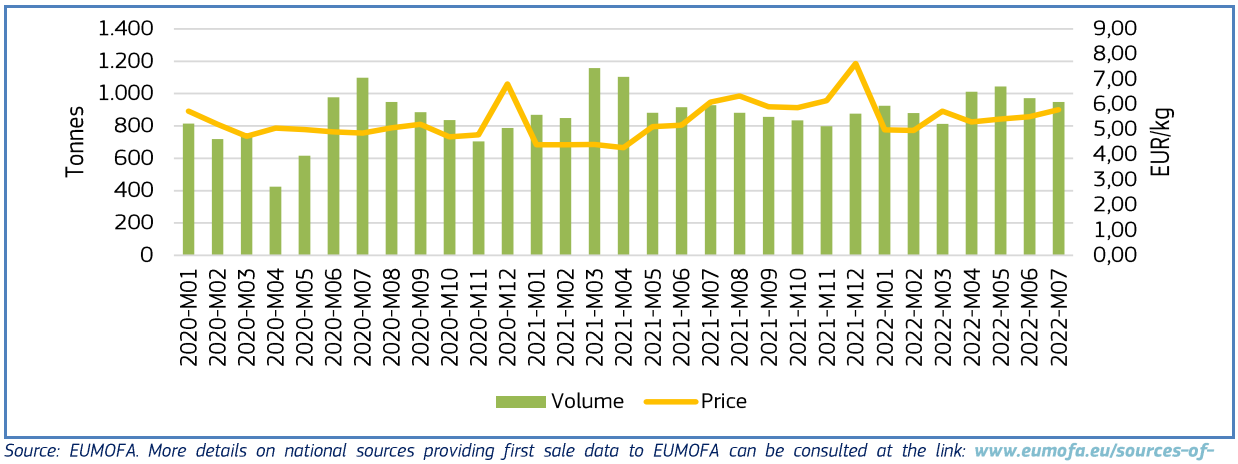
	2016		2017		2018		2019		2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Ireland	11.541	38.645	10.416	25.554	11.474	41.517	12.142	50.184	12.109	47.463
Spain	7.886	44.675	7.178	41.334	11.515	72.742	11.243	69.801	10.581	58.672
France	14.241	73.414	13.463	68.133	12.314	67.424	10.633	59.507	9.816	51.109
Denmark	2.137	10.848	2.687	13.425	2.695	14.247	2.628	13.599	1.847	8.873
Italy	1.270	10.673	1.677	11.811	1.591	11.486	1.471	9.772	919	6.444
Greece	433	2.102	489	2.115	657	2.453	844	3.500	731	2.713
Portugal	522	2.794	546	3.208	342	2.264	309	2.071	606	3.675
Belgium	425	4.398	510	5.287	335	3.800	346	3.580	408	3.650
Netherlands	136	620	169	739	170	738	368	1.408	289	1.016
Croatia	72	453	68	448	76	463	93	578	110	672
Others	32	240	120	564	47	294	61	376	47	265
Total	**38.695**	**188.862**	**37.323**	**172.616**	**41.215**	**217.428**	**40.138**	**214.377**	**37.463**	**184.552**

Source: Eurostat

4.3 First sales in the EU

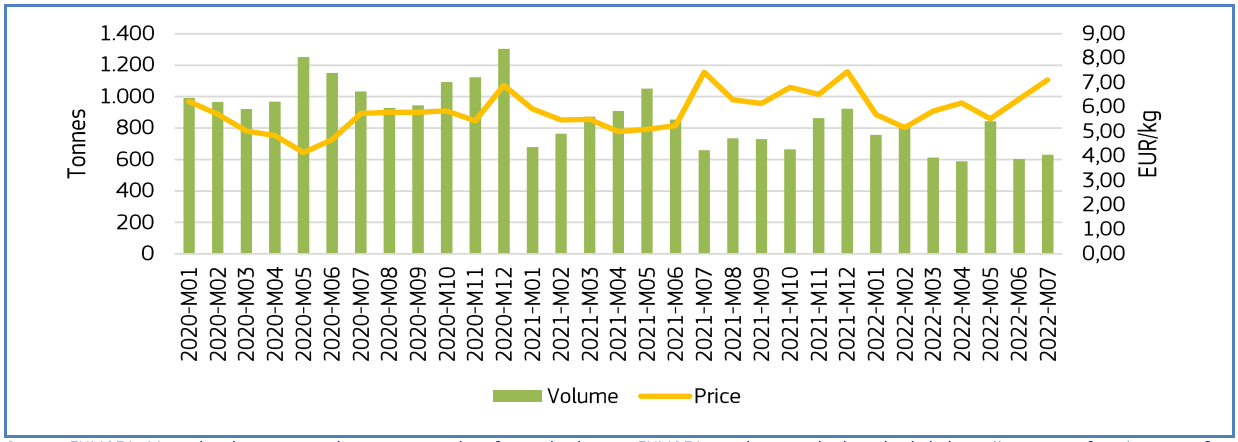
In 2021, monthly first sales of monks in reporting Member States amounted to 24.000 tonnes at a value of 137 million EUR and an average price of 5,75 EUR/kg. Most first sales were in France (46%) and Spain (40%), followed by Denmark (7%). Monks are usually sold fresh in all reporting Member States (98% in 2021), whereas Spain sells some frozen cuts and whole/gutted monks (5% in 2021).

Figure 40. **MONTHLY FIRST SALES OF MONKS IN FRANCE (volume in tonnes, price in EUR/kg)**



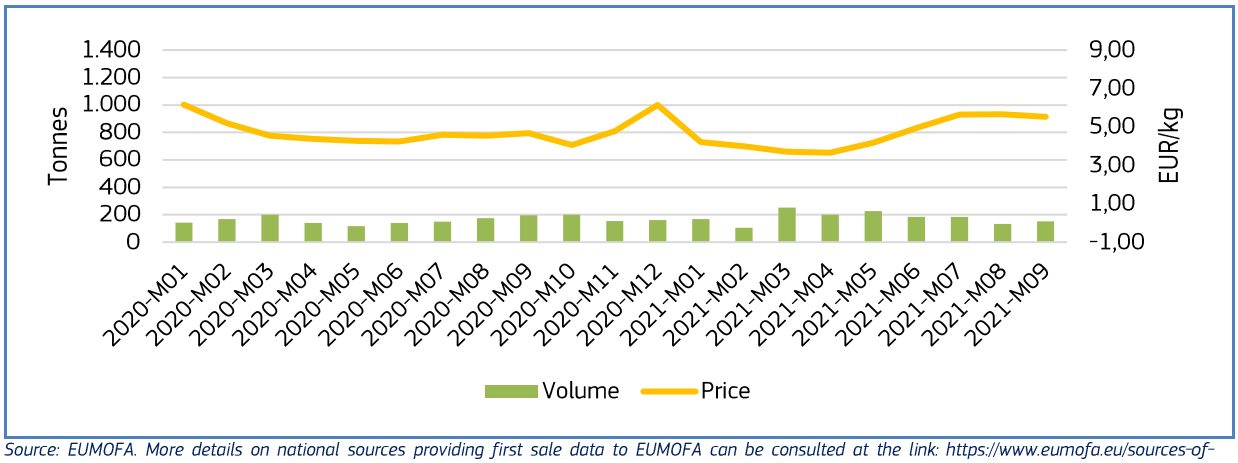
Source: EUMOFA. More details on national sources providing first sale data to EUMOFA can be consulted at the link: www.eumofa.eu/sources-of-data#firstSaleTab

Figure 41. **MONTHLY FIRST SALES OF MONKS IN SPAIN (volume in tonnes, price in EUR/kg)**



Source: EUMOFA. More details on national sources providing first sale data to EUMOFA can be consulted at the link: https://www.eumofa.eu/sources-of-data#firstSaleTab.

Figure 42. **MONTHLY FIRST SALES OF MONKS IN DENMARK (volume in tonnes, price in EUR/kg)**



Source: EUMOFA. More details on national sources providing first sale data to EUMOFA can be consulted at the link: https://www.eumofa.eu/sources-of-data#firstSaleTab.

Since 2017, the average monthly first sales price of monk has remained stable, ranging from 5,33 EUR/kg in 2020 to 5,88 EUR/kg in 2018. Prices show a seasonality, with price peaks in December (from 6,81 to 8,19 EUR/kg) when product volumes are usually lowest. Prices seldom drop below 5,00 EUR/kg, although prices down to 4,48 EUR/kg have been recorded during spring/summer when monk fisheries are most active. However, EU fisheries deliver a stable supply of monks throughout the year. In the period 2017-2021 first sales volumes rarely dropped below 2000 tonnes per month. Volumes have declined steadily since 2017 and first sales volumes post 2021 have remained below 2000 tonnes per month, except during peak harvest months (March-June 2021, May 2022).

4.4 EU Trade

Monks are considered a valuable commodity. However, production volumes are too low to make a great impact on the global economy. Although monks can be identified in the EU's trade statistics, many third countries trade the species under the generic description "other demersal species". Thus, trade of monks cannot be accurately identified for certain third countries, such as South Africa, China and the USA. Historically, the EU has had a trade deficit for monk products and in 2021 the deficit amounted to 127,5 million EUR (Figure 45). In 2021 about 17.000 tonnes of monks were exported intra-EU at a value of 122 million EUR. Of the total value, 74% came from fresh whole monk products, 21% from frozen whole monk

products and frozen fillet, and 5% from other cuts. France, Denmark and Spain were the main monk suppliers to other EU countries, whilst Spain, Italy and Germany were the main destinations.

Extra-EU export

In 2021 EU Member States exported around 450 tonnes of monks at a value of about 3,5 million EUR. (Table 23).

Table 23. **EXTRA-EU EXPORT OF MONKS BY MS (volume in tonnes, value in 1.000 EUR)**

	2018		2019		2020		2021		YTD 2022*	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Ireland	799	3.161	789	3.777	574	2.548	108	634	125	594
Spain	132	1.095	222	1.746	221	1.742	129	964	74	302
Denmark	29	241	116	1.059	126	656	99	612	56	373
Netherlands	89	950	64	691	31	383	51	697	28	375
Germany	20	131	18	123	26	136	24	174	35	26
Others	68	678	87	728	65	639	46	479	26	263
Total	**1.136**	**6.254**	**1.297**	**8.125**	**1.043**	**6.104**	**456**	**3.560**	**344**	**1.933**

*Source: Eurostat-Comext. *Up to and including June.*

Compared to the previous year, export volume and value decreased by 56% and 42%, respectively in 2021. Since 2018, Ireland has been the largest exporter of monks (mainly to the UK), accounting for 56% of export volume and 41% of export value of total EU export. Post Brexit, a marked decline in exports from Ireland to the UK was evident in 2021 (down 81% from 2020) and so far in 2022 is below average volumes seen during the same time period in previous years[41]. Since 2018 Spain and Denmark have accounted for 18% and 10% of total export volume and 23% and 11% of total export value. Over 90% of monk exports were of whole/gutted presentation and most (75%) of the fish was exported live/fresh. Since 2018 the UK has received 71% of all monk exports from EU Member States, most of which was reported as live/fresh exports from Ireland (73%).

Extra-EU import

In 2021, EU Member States imported 23.000 tonnes monks at a value of 131 million EUR (Table 24), which corresponds to a 13% increase in volume and a 14% increase in value since 2020. Spain was the main importer of monks to the EU, accounting for 28% of total import volume and 31% of import value since 2018. Around 50% of their imports came from the UK as whole/gutted monk, of which 60% were imported as live/fresh monk and about 40% frozen. Other major suppliers to Spain were Namibia, China, Morocco and South Africa, where most imports were of frozen monk, except for imports from Morocco, which were live/fresh.

France, Portugal and Italy were other major importers of monks to the EU, accounting for 16%, 14%, and 14% of import volume and 22%, 17%, and 9% of import value, respectively. More than 80% of imports to France came from the UK, mainly as whole/gutted monk that was live/fresh. France also imported frozen monk fillets from USA, South Africa and China, which made up approx. 6% of their imports. Nearly all monk imports to Portugal were frozen (whole/gutted) and supplied by China, South Africa and Namibia. Italy imported mainly frozen monk (>70 %) from South Africa, Namibia and China, but also imported live/fresh monk from the UK (about 25% of imports).

Table 24. **EXTRA-EU IMPORT OF MONKS BY MS (volume in tonnes, value in 1.000 EUR)**

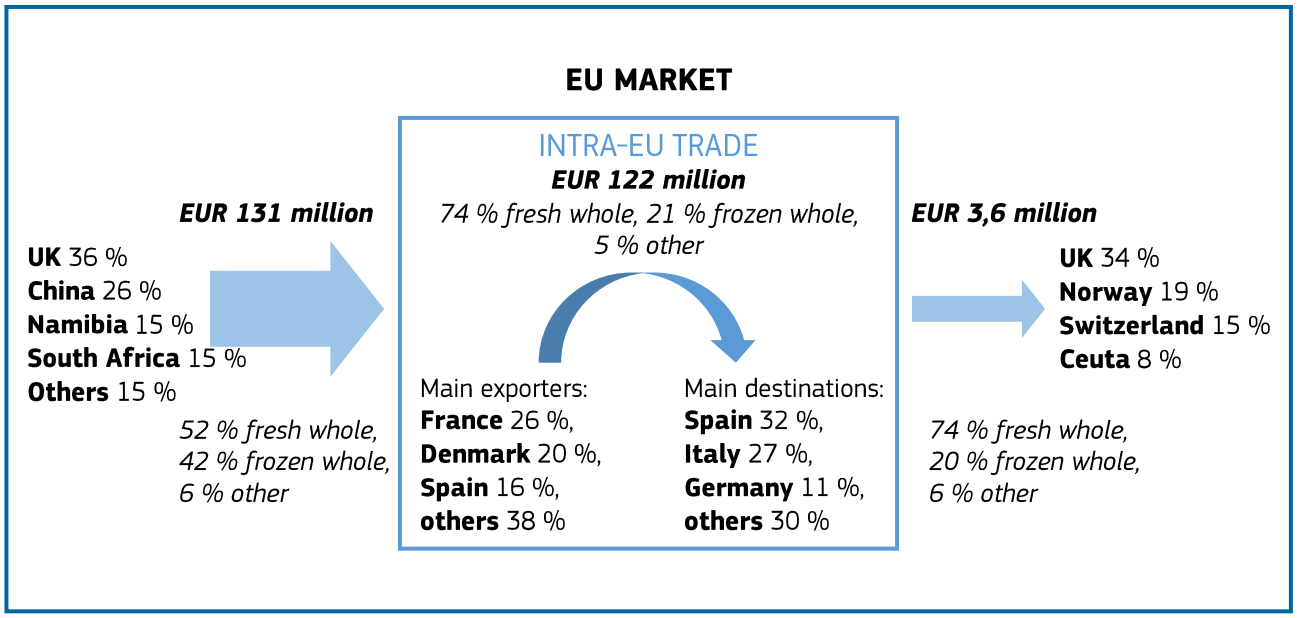
	2018		2019		2020		2021		2022	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Spain	6.037	39.928	6.206	41.193	7.321	45.633	5.555	35.175	2.818	18.000
France	3.056	23.051	2.450	19.297	2.668	18.008	5.084	43.924	2.527	23.472
Portugal	3.036	10.918	3.836	15.173	2.518	9.342	3.010	9.172	1.887	6.122

[41] Up to and including June 2022.

Italy	3.464	27.435	3.648	28.253	2.646	19.206	2.213	13.273	1.704	10.368
Belgium	2.005	5.094	1.960	6.189	1.511	4.424	1.682	4.047	1.103	3.536
Others	3.908	22.272	3.881	23.578	3.386	18.133	5.126	24.970	2.348	11.926
Total	**21.506**	**128.697**	**21.981**	**133.683**	**20.050**	**114.747**	**22.669**	**130.562**	**12.386**	**73.423**

Source: Eurostat-Comext.

Figure 43. **MONKS EU-TRADE MARKET IN 2021, IN VALUE**



Source: Eurostat-Comext.

4.5 Marketing and consumption

Monk meat is much appreciated for its firmness, meaty texture and because it is boneless, unlike meat from many other fish[42]. Fillets are cut from the tail (whole body, minus the head) and cheeks and the flavour compares to that of langoustine. Monk cheek fillets are cut out from under the eyes and are considered a delicacy with texture resembling scallops. It is a valuable species that is mainly sold fresh or frozen, with little processing of the meat involved. Monk fillets are prepared in a multitude of ways: pan fried, barbecued, poached, steamed, stewed or roasted.

The liver of monks is considered a winter delicacy in Japan, served in a traditional dish called Ankimo[43]. In this dish, the monk liver is cleaned and soaked in milk, then rinsed and brined in a marinade infused with sake and mirin. Before serving, the liver is rolled in a cylinder and steamed, then served sliced with grated daikon, sliced scallions, and ponzu sauce. In recent years it has also become a popular sushi dish in Japan and the USA. In France it is usually sold canned.

In EU Member States, monks are mainly consumed in Spain and France. Consumption of monks in Spain has shown a negative trend since 2013[44]. In 2019, Spanish households consumed 0,3 kg monk per person, which is the lowest per capita consumption registered in the period 2013-2019. FranceAgriMer reported that in 2019 the per capita consumption of monk in French households was 0,4 kg [45].

[42] Fresh fish daily www.freshfishdaily.co.uk/everything-you-need-to-know-about-monkfish
[43] Taste atlas. https://www.tasteatlas.com/ankimo
[44] Statista www.statista.com/statistics/775837/consumption-per-capita-from-snuff-in-spain
[45] FranceAgriMer
www.franceagrimer.fr/fam/content/download/65441/document/CC%20p%C3%AAche%20aqua%20ANG%20web.pdf?version=1

5. Case study: Summary of the oyster price structure analysis

This case study summarises an extensive analysis conducted by EUMOFA of the EU market for oysters and the price transmission of fresh oysters, with specific focus on France, Ireland and the Netherlands. France is the largest market for oysters in the EU. It is both the main producer and consumer. French production is mostly absorbed by the domestic market which is also supplemented by imports, mainly from Ireland, the Netherlands and the United Kingdom. The Irish market is small, even though the country is the second largest producer in the EU. The Netherlands also is a small market for oysters. Production in both countries is thus export oriented.

5.1. Oysters: global supply

Global oyster production is mainly from aquaculture (98% in 2020). In 2020 total production amounted to approx. 6,4 million tonnes, which was 39% more than in 2011. China is the largest producer globally, providing 85% of the total volumes of oyster production. The EU-27 was the world's fifth largest producer (2% of total volumes). In 2020, the main oyster species produced worldwide were the cupped oysters nei (86% of production), followed by the pacific cupped oyster (10%) and the American cupped oyster (3%).

Table 25. **TOTAL WORLD PRODUCTION OF OYSTERS (volume in 1.000 tonnes)**

Country	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
China	3.580	3.784	4.038	4.159	4.381	4.660	4.879	5.140	5.226	5.425
Rep. of Korea	306	303	253	303	287	283	330	340	357	326
USA	176	195	198	189	191	192	193	205	226	183
Japan	166	161	164	184	164	159	174	177	162	159
EU-27	97	93	92	91	81	93	101	110	105	98
Others	246	178	190	205	207	219	257	204	179	185
Total	**4.571**	**4.715**	**4.935**	**5.131**	**5.311**	**5.607**	**5.935**	**6.176**	**6.255**	**6.376**

SOURCE: FAO.

5.2. The EU market for oysters

EU production

In 2020 EU oyster production amounted to almost 97.900 tonnes. Between 2011 and 2020 EU production was relatively stable (+1%) but decreased by 7% from 2019 to 2020.

France is the main producer in the EU, accounting for 82,5% of EU production in 2020. The same year, Ireland was the second largest producer providing almost 10% of EU production. The other main producers were Portugal and the Netherlands, providing 3,7% and 2,4% respectively of EU production. French production has been stable over the period studied (2011-2020), except for a sharp decrease in 2015 due to significant mortalities, whereas from 2011 to 2020 Irish and Dutch production decreased by 16% and 11% respectively. Over the same period, Portuguese production increased significantly from less than 1.000 tonnes to over 3.600 tonnes.

In the EU, oysters come from aquaculture production. Fishery activities produce only anecdotal volumes, estimated at approx. 350 tonnes, mainly in Denmark which produced 53% of EU oyster fishery production in 2020.

Table 26. **EU PRODUCTION OF OYSTERS BY MAIN PRODUCING MS (volume in tonnes)**

EU MS	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
FR	79.338	80.609	77.699	75.262	64.986	77.681	84.976	92.122	85.964	80.796
IE	11.280	7.560	8.851	9.777	9.700	8.192	10.409	10.369	10.716	9.475
PT	943	819	869	1.107	1.060	1.000	1.246	3.474	4.047	3.632
NL	2 680	2.540	2.959	3.264	3.151	3.688	2.617	2.714	2.557	2.374
ES	1.868	1.361	1.060	1.072	1.154	1.448	1.300	1.156	1.404	1.097
IT	42	47	53	147	145	145	145	80	100	226
DK	804	296	142	83	137	145	150	307	296	181
Other	137	183	413	612	719	528	335	252	219	106
EU-27	**97.092**	**93.416**	**92.045**	**91.324**	**81.052**	**92.827**	**101.178**	**110.474**	**105.303**	**97.887**

SOURCE: FAO.

Import-export

In 2021, **extra-EU imports** amounted to 2.270 tonnes (product weight) at a value of EUR 7,7 million. The main share of extra-EU imports consists of live-fresh oysters (85% of extra-EU imports in value and 95% in volume). A large share of EU imports comes from the United Kingdom (84% of the extra-EU imports value). France is the main importer. In 2021, France alone imported 85% of the extra-EU imports in value terms. Between 2012 and 2021 EU imports from third countries increased in both volume and value. Volumes grew by 80% while their total value grew by 36% in nominal terms (20% in real terms[46]).

In 2021, **extra-EU exports** of oysters amounted to 7.455 tonnes at a value of EUR 62,1 million. This consisted almost exclusively of live-fresh oysters (96% of extra-EU exports in value and 94% in volume). France was the main exporter, exporting 75% of the EU exports to third countries in value terms. Ireland, the Netherlands and Denmark were the other largest EU exporters. The main destinations were China (33% of EU exports in value in 2021), Hong Kong (22%), and Switzerland (13%). Between 2012 and 2021, total EU exports of oysters increased by 193% in volume and 212% in value in nominal terms (176% in real terms).

In terms of **intra-EU trade**, France is the main EU oyster exporter, at a value of over EUR 66,5 million for 10.035 tonnes in 2021. France was followed by Spain, Ireland and the Netherlands, with oyster exports exceeding EUR 17 million for each in 2021. France and Italy are the main destinations for intra-EU exports. Spain is the largest exporter of smoked oysters (7.428 tonnes at EUR 31,5 million), while the other EU MS export almost exclusively live oysters.

EU supply and apparent consumption

In 2020, the **total EU oyster supply** (production + imports) amounted to 97.063 tonnes live weight equivalent (LWE)[47], with 98% of the total supply coming from EU internal production (95.318 tonnes, LWE). Imports represented 1.745 tonnes (LWE), which was only 2% of the EU supply. With regards to exports, these were estimated at 5.575 tonnes (LWE), i.e., 6% of the EU supply. **Apparent consumption** at EU-27 level (production + imports – exports) was thus estimated at 91.488 tonnes LWE.

[46] Values in real terms are calculated by using the GDP deflator (base=2015).
[47] Production data provided in this section are from FAO Fish Stat, except for Ireland for which production from EUROSTAT has been used. For Ireland, FAO Fish Stat provides the whole production, including a production share which is traded between farmers as half-grown oysters for on-growing, while EUROSTAT provides the production for human consumption.

France was the largest MS in terms of apparent consumption in 2020 (almost 76.000 tonnes, LWE). The French per capita consumption is 1,13 kg per year[48]. Other MS with significant apparent consumption in 2020 included Italy, Ireland, Portugal, Belgium, the Netherlands and Spain (with an apparent consumption above 1.000 tonnes LWE for each MS).

5.3. The French market

Production, trade and supply

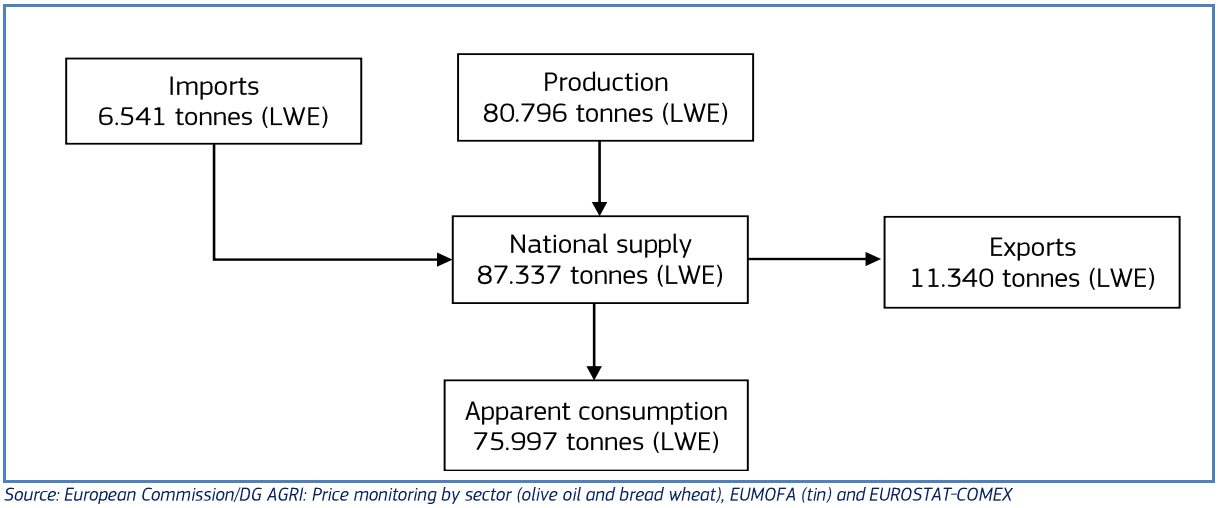
France is the largest EU oyster producer. In 2020, it provided 83% of EU oyster production, almost exclusively from aquaculture. According to national statistics[49], French oyster production amounted to 80.783 tonnes at a sales value (at ex-farm stage) of EUR 357 million, with an average ex-farm price of 4,40 EUR in 2020. The main producing area is "Charente-Maritime" with 35.646 tonnes in 2020, followed by Brittany (10.514 tonnes in northern part and 9.158 tonnes in southern part) and "Normandy – North Sea" with 9.736 tonnes.

In 2021, total oyster **imports** to France reached 9.540 tonnes (product weight) and EUR 42,4 million. Oysters were mainly imported live-fresh (99% of the import value). Ireland was the main supplier to the French market (Ireland supplied 78% of the French imports value in 2021), followed by the UK (15%) and Portugal (5%).

The same year, oyster **exports** from France reached 15.377 tonnes and EUR 112,8 million in 2021. This comprised almost exclusively live, fresh or chilled oysters (99% of French oyster exports, EUR 111,8 million). In 2021, main destinations were Italy (25% of French oysters export value), China (15%), Netherlands (9%) and Hong-Kong (8%).

In 2020, the total oyster **supply** in France amounted to 87.337 tonnes live weight equivalent (LWE), of which 93% was produced in France (aquaculture + fishery) and 7% came from imports. During the same year, 13% of this supply was exported and 87% supplied the national market (75.997 tonnes LWE).

Figure 44. **SUPPLY BALANCE FOR OYSTER IN FRANCE (2020, tonnes, LWE)**



Source: European Commission/DG AGRI: Price monitoring by sector (olive oil and bread wheat), EUMOFA (tin) and EUROSTAT-COMEX

[48] Per capita apparent consumption is estimated based on the total population (2020) provided by EUROSTAT.
[49] Source: Enquête Aquaculture, Agreste

Market, consumption and prices

French production is mostly absorbed by the domestic market which is also supplemented by imports, mainly from Ireland, the Netherlands and the United Kingdom. In 2020 the at-home consumption of oysters was 22.925 tonnes at a total value of EUR 161 million[50]. The French market is characterised by a high level of segmentation with different schemes being used: geographical indications, quality labels (Label Rouge) and organic scheme.

The consumption of oysters is highly seasonal. It is below 2.500 tonnes per month from January to November and approx. 8.000-10.000 tonnes in December. Oysters are traditionally consumed at Christmas and New Year's Eve. Large-scale retail and outdoor markets are the main channels for household consumption, accounting for about 80% the sales volume in both 2019 and 2020.

Prices provided in Table 26 are for the two species reared in France. The Pacific cupped oyster is the main species produced and consumed in France (over 98% of oyster aquaculture production). Between 2011 and 2020 ex-farm prices decreased by 9% for Pacific cupped oyster and by 34% for European flat oyster (which corresponds to a 20% and 41% decrease in real terms). In 2020, the Pacific cupped oyster was sold at 4,41 EUR/kg, while the European flat oyster was sold at 5,27 EUR/kg, but in smaller volumes. At regional level, the ex-farm price ranges from 3,70 EUR/kg (Normandy-North Sea) to 4,90 EUR/kg (Arcachon-Aquitaine).

Table 27. **NOMINAL EX-FARM PRICES OF OYSTERS IN FRANCE (2011-2020, EUR/kg)**

Species	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Pacific cupped oyster	4,86	4,90	4,97	4,55	5,15	5,06	4,93	4,06	4,61	4,41
European flat oyster	7,94	7,74	6,73	6,34	7,60	8,88	7,73	7,99	6,04	5,27

SOURCE: based on Eurostat.

The main drivers of oyster prices are size (higher prices for larger oysters) and quality (segmented in geographical indications, production methods and quality labels). At retail stage, the average purchase price was 7,00 EUR/kg, confirming the decreasing trend observed since the peak reached in 2014 (8,00 EUR/kg). However, the range of retail prices is high because of the high segmentation level of the oyster value chain in France (size, quality).

Table 28. **NOMINAL RETAIL PRICES OF OYSTERS IN FRANCE (2011-2020, EUR/kg)**

Species	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Average price (EUR/kg)	7,20	7,80	7,60	8,00	7,40	7,30	7,30	7,30	7,10	7,00

SOURCE: based on Eurostat.

5.4. The Irish market

Production, trade and supply

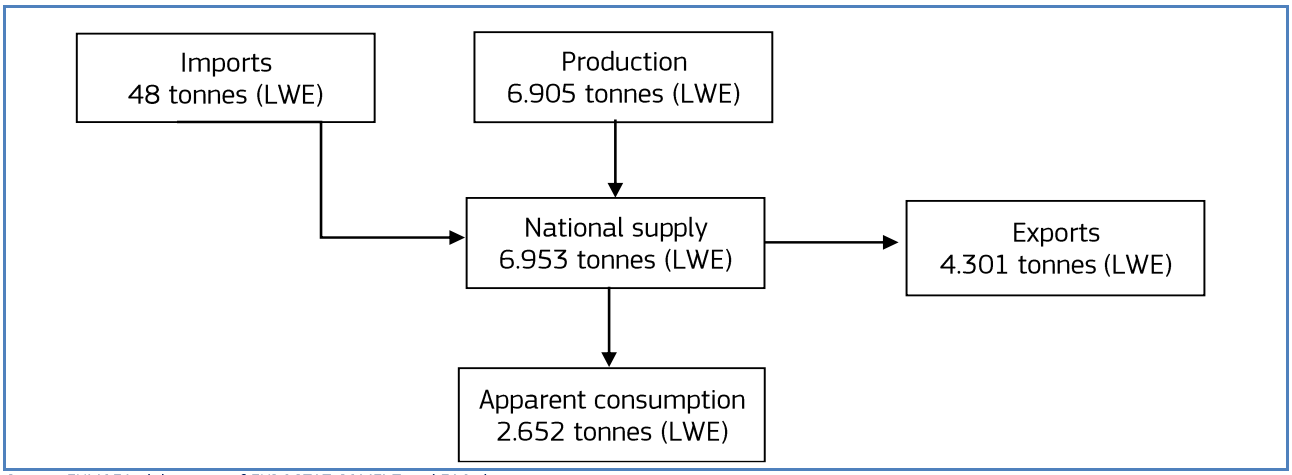
Oyster production in Ireland amounted to 9.475 tonnes in 2020 (97% of pacific oyster). Production is widespread along the coast with concentrated production in the south-east and the north-west regions. One of the main features of the oyster supply chain in Ireland is that it is **export-oriented**. Irish oysters are exported almost exclusively live or fresh (99% of export value in 2021). The market for Irish oysters is mainly the EU, mostly France with 76% of Irish export volumes in 2021 (4.712 tonnes at a value of EUR 24,4 million).

Oyster **imports** to Ireland are marginal. In 2021, less than 50 tonnes were imported to Ireland at a value of around 470.000 EUR. Imports since 2020 have been particularly low due to the COVID-19 pandemic. In 2021, the main suppliers were the Republic of Korea (56% of the import value) and the United Kingdom (31%).

[50] Source: FranceAgriMer based on Kantar Worldpanel

In 2020, the Irish oyster **supply** reached 6.953 tonnes (LWE), mainly from national production. The Irish oyster market is export oriented (62% of the national supply). National consumption is relatively small and estimated at 2.652 tonnes in 2020, i.e., 38% of the Irish supply. In 2020, the oyster apparent consumption in Ireland was higher than usual levels (it is estimated at 1.704 tonnes, i.e., 21% of the Irish supply in 2019), because of the COVID-19 pandemic and resulting lower exports (due to border closures and sanitary measures in main export markets).

Figure 45. **SUPPLY BALANCE FOR OYSTER IN IRELAND (2020, tonnes, LWE)**



Source: EUMOFA elaboration of EUROSTAT-COMEXT and FAO data.

Market prices

For many years, France has been the only export market for Irish oysters which were sold in bulk to the French wholesale market. However, based on trade data and interviews with stakeholders, a few years ago Irish producers started to diversify their markets with increased volumes exported to mainland China and Hong Kong. The Irish oyster sector started to invest in packaging and branding, focusing on the superior quality of Irish oysters in order to produce a luxury product sought by the Asian market. Another important factor in the Irish oyster market is the size of the oysters. Before being put on the market, oysters are graded according to the clients' requirements. In Ireland, grading is done by size. The smallest grade corresponds to half-grown oysters sold to other producers. The French market still prefers the intermediate size class, while the largest sizes (with some exceptions) generally go to Asia.

The average ex-farm price was estimated at 4,11 EUR/kg in 2020 based on Eurostat data (-6% compared to 2019). Between 2016 and 2019, the average ex-farm price remained relatively stable at around 4,36 EUR/kg.

Table 29. **NOMINAL EX-FARM PRICES OF OYSTERS IN IRELAND (2016-2020)**

Species	2016	2017	2018	2019	2020
Price (EUR/kg)	4,34	4,34	4,39	4,36	4,11

SOURCE: based on Eurostat.

The main drivers of oyster prices are the ploidy (triploid are sold at higher price than diploid oysters), size (higher prices for larger oysters) and production area (leading in different flesh yield).

Over the last five years average export prices of live oysters have increased by 22% from 4,76 EUR/kg in 2016 to 5,81 EUR/kg in 2020 (in nominal terms). Even though 2020 was a particular year (with the strong impact of the COVID-19 pandemic on the Irish shellfish sector), the increasing trend was confirmed by producers during interviews and explained by increasingly targeting valuable markets, particularly China.

Table 30. **EXPORT PRICES (nominal price in EUR/kg) AND VOLUME (in tonnes) FOR LIVE OYSTERS IN IRELAND (2017-2021)**

Species	2017	2018	2019	2020	2021
Export price	4,98	5,40	5,49	5,81	5,68
Export volume	7.661	7.664	6.492	4.266	6.150

SOURCE: based on Eurostat.

5.5. The Dutch market

Production, trade and supply

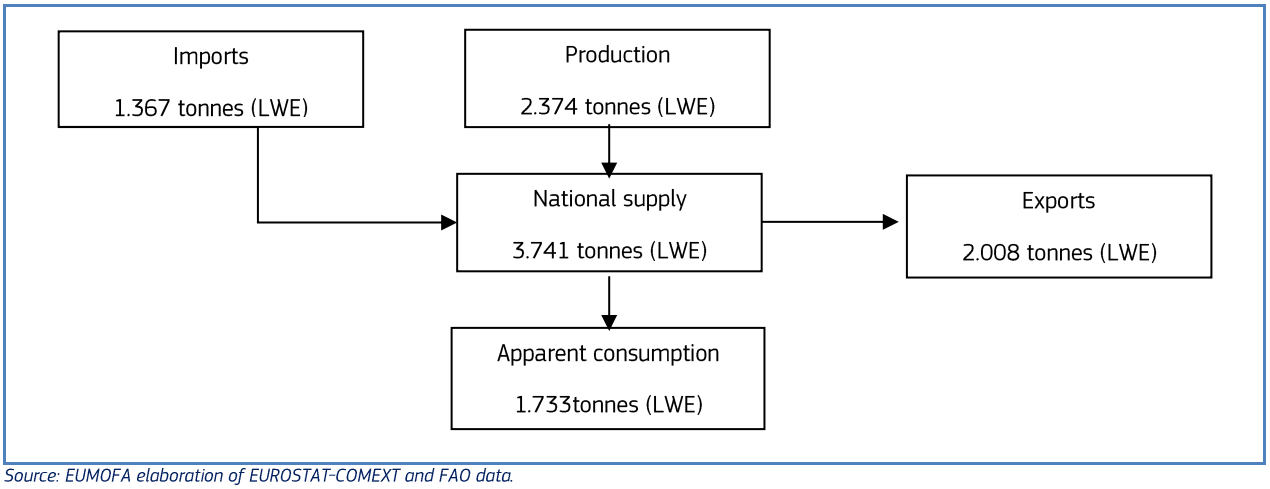
In 2020 oyster production in the Netherlands was estimated at 2.374 tonnes with almost 100% of production from aquaculture (of which 80% are Pacific oysters). Between 2011 and 2020, Dutch oyster production decreased by 11% (12% for aquaculture).

In 2021 Dutch oyster **imports** reached 1.567 tonnes at almost EUR 14,1 million. These comprised mainly live, fresh or chilled oysters (98% of the imports value). The main suppliers to the Dutch market were France (72% of the value of the Dutch imports, at EUR 10,1 million) and Ireland (20%, EUR 2,8 million).

The same year, Dutch oyster **exports** reached 2.984 tonnes at a value of over EUR 21 million, which comprised mainly live, fresh or chilled oysters (94% of the exported value). Main destinations in 2021 were Belgium (40% of the Dutch exports in value; EUR 7,9 million), followed by Germany (17%; EUR 3,3 million) and Italy (12%; EUR 2,3 million).

In 2020, the total supply of oysters in the Netherlands came to 3.741 tonnes LWE, 63% from national production (aquaculture + fisheries) and 37% from imports. From this supply, 46% was sold on the national market while around 54% was exported, mainly within the EU. In 2020, the oyster apparent consumption in the Netherlands was higher than other years as a result of lower exports from the Netherlands to other countries due to the COVID-19 pandemic. Dutch consumption of oysters is normally low.

Figure 46. **SUPPLY BALANCE FOR OYSTERS IN THE NETHERLANDS (2020, TONNES, LWE)**



Source: EUMOFA elaboration of EUROSTAT-COMEXT and FAO data.

Market, consumption and prices

According to the stakeholders interviewed, Dutch consumption of oysters is low. Main sales channels on the domestic market are retailers and restaurants. However, demand is increasing while production is falling. To manage this situation, the Wageningen Research Institute has a research programme (2020-2023) to improve the production yield of oysters.

According to EUROSTAT, ex-farm prices were very variable over the period 2011 and 2020 (between 1,28 EUR/kg and 7,62 EUR/kg). From the same source, ex-farm price (on-bottom oyster) was about 3,71 EUR/kg in 2020. Prices provided by producers during interviews were around 1,80 EUR/kg on average during the last 5 years.

Table 31. **NOMINAL EX-FARM PRICES OF OYSTERS IN THE NETHERLANDS (2011-2020)**

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Average price (EUR/kg)	1,45	1,3	1,28	2,38	4,84	4,68	7,62	5,39	2,65	3,71

SOURCE: based on Eurostat.

According to EUROSTAT-COMEXT data, the price of imported oysters increased significantly between 2012 and 2021 (by +260% in real terms) and was around 9,00 EUR/kg in 2021. However, producers interviewed consider that prices observed in the market are lower than those provided by official statistics, which they estimate to be around 2,50 EUR/kg on average during the same period. The increase of import prices could be caused by several factors, including an increase in the share of imports of packed oysters.

Between 2012 and 2021 export prices increased significantly from 2,54 EUR/kg and 7,34 EUR/kg in nominal terms (+156% in real terms). Based on interviews, the price of oysters exported to Belgium (which is the main destination of Dutch exports) is around 3,10 EUR/kg (4,65 EUR/basket of 12 oysters).

Table 32. **IMPORT AND EXPORT PRICES OF OYSTERS IN THE NERTHERLANDS (2011-2020, EUR/kg)**

Species	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Import prices	2,23	2,64	4,40	4,53	7,39	8,35	7,61	8,82	9,03	9,07
Export prices	2,54	4,22	5,06	5,27	6,38	5,66	4,28	4,67	6,86	7,34

SOURCE: based on Eurostat.

5.6. Price transmission in the supply chain

France is the biggest market for oysters in the EU. It is both a major producer and consumer. Production is significant and there is a market segmentation for higher quality thanks to the use of quality schemes (i.e., Label Rouge and the PGI). There are also common practices among producers to sort the products based on size and quality.

The **Irish market** is small, even though the country is the second largest producer in the EU. Production is export-oriented with the EU being the main market, whereas Asian markets generate the highest prices. A significant share of the Irish production is exported without being sorted or packed (i.e., bulk).

The Netherlands is also a small market for oysters with low national consumption. However, there is significant activity around processing and packing, as both national and imported products in bulk are processed and packed before being exported.

The price transmission analysis covered the following products:

- France: oyster under PGI sold in supermarkets.
- Ireland: 1) high quality special oysters produced in Ireland and exported in bulk to France; 2) high quality special oysters produced in Ireland and exported packed to China.
- The Netherlands: oysters sold in restaurants.

The ex-farm prices (or import price in the Netherlands) range from 1,80 EUR/kg to 5,50 EUR/kg, depending on size and quality. Ex-farm prices provided in this case study for Ireland are higher than in the other countries, because according to

producers, they are prices for special high-quality oysters that could be sold up for to 6,00 EUR/kg at ex-farm stage. The retail price (excl. VAT) of oysters varies from 6,58 EUR/kg in France to 19,32 EUR/kg in the Netherlands. The prices of Irish oysters in the export market show significant differences based on the destination: Irish packed oysters are sold at 9,50 EUR/kg on the French market (ex-packer stage) and at 11,50 EUR/kg on the Chinese market (ex-wholesaler stage).

Table 33. **SYNTHESIS OF THE PRICE STRUCTURE ANALYSIS IN FRANCE AND THE NETHERLANDS (EUR/kg, nominal value)**

MS	**France**	**Netherlands**	
Product	**Produced in FR**	**Produced in NL**	**Imported from FR**
Sales channel	**Supermarket**	**Restaurants**	**Restaurants**
Year	**2021**		
Raw material: ex-farm or import price	3,50	1,80	2,50
Wholesale costs and margins	1,44	6,86	8,15
Wholesale price	5,48	8,66	10,65
Retail costs and margin	1,10	6,26	8,67
Retail price excl. VAT	6,58	14,92	19,32
Retail price incl. VAT	6,94	16,20	21,00

Source: EUMOFA

Table 34. **SYNTHESIS OF THE PRICE STRUCTURE ANALYSIS IN IRELAND (EUR/kg, nominal value)**

MS	**Ireland**	
Product	**Produced in IE**	**Produced in IE**
Sales channel	**Exported to France**	**Exported to Shanghai**
Year	**2021**	**2019**
Raw material: ex-farm	5,50	3,85
Intermediate margin	0,30	-
International transport	0,22	4,00
Costs (purification, cleaning, packing) and margins	1,72	3,15
Sale price at destination market (ex-packer / wholesaler)	9,50	11,50

Source: EUMOFA

6. Global highlights

EU / Deep-sea fishing: On 15 September 2022, the European Commission adopted an **implementing act** closing 87 areas to all bottom fishing gears. This represents 17% of the area between 400-800 metres depth of EU waters of the North-East Atlantic and 1.16% of the EU waters of the North-East Atlantic[51]. Based on the Deep-sea Access Regulation and on the advice from the scientists of the International Council for the Exploration of the Sea (ICES), the new regulation protects 57 vulnerable deep-sea ecosystems while generating the least disruption possible to fishing activities. The total area of the closures represents 16.419 km^2 reserved for the protection of vulnerable marine ecosystems. The closures concern vessels equipped with bottom gears, meaning bottom trawls, dredges, bottom-set gill nets, bottom-set longlines, pots and traps. The implementing act will enter into force 20 days after publication in the Official Journal of the European Union[52].

High Seas / Biodiversity: Organized between 15 and 26 August in New York, the 5th Intergovernmental Conference negotiating the UN High Seas Biodiversity Treaty suspended its session with significant progress made in almost all chapters, bringing the international community closer to protect the ocean, tackle environmental degradation, fight climate change, prevent biodiversity loss, and establish large-scale marine protected areas. The EU, leading a High Ambition Coalition of 50 countries, worked with all geographical groups and countries, leading the negotiations to bridge the remaining divides on all essential elements of the future Treaty. As a result, the process for establishing and managing marine protected areas in the high seas was clarified, requirements for environmental impact assessments for future activities in the high seas were elaborated, and modalities for developing capacities on ocean management were laid down. Progress was also made on the institutional framework of the agreement. The High Seas treaty will be instrumental in achieving the goal of protecting at least 30% of the world's oceans[53].

EU / Baltic Sea / Fishery: On 23 August 2022 the European Commission adopted a proposal for fishing opportunities for 2023 for the Baltic Sea. Based on the proposal, EU Member States will determine the maximum quantities of the most important commercial fish species that can be caught in the sea basin. The Commission proposed to increase fishing opportunities for central herring and plaice, maintain current levels for salmon and levels of by-catch of western and eastern cod and western herring, and decrease fishing opportunities for the four remaining stocks covered by the proposal, in order to improve sustainability and allow them to recover. Over the past decade, EU fishers, industry and public authorities have made major efforts to rebuild fish stocks in the Baltic Sea. However, commercial stocks of western and eastern cod, western herring, and the many salmon stocks in both the southern Baltic Sea and the rivers of the southern Baltic EU Member States are under severe environmental pressure from habitat loss, due to the degradation of the living environment[54].

UK / Fishery: The Government launched a consultation to gather evidence on the impact of flyseining in English waters to support sustainable fishing and reduce pressure on fish stocks. Flyseining is a fishing method targeting demersal species which live on or near the sea bed, many of which are non-quota stocks, thus their fishing is not limited. Measures under consideration include restricting the number of vessels with flyseining gear, the power of their engines and placing limits on the fishing gear. The consultation complements work to develop a Fisheries Management Plan for demersal non-quota species in the Channel, and will also look at longer term management approaches for a number of the species targeted by larger flyseine vessels[55].

[51] Deep-sea fisheries (europa.eu)
[52] https://oceans-and-fisheries.ec.europa.eu/news/fisheries-end-bottom-fishing-protected-deep-sea-ecosystems-eu-waters-2022-09-15_en
[53] https://oceans-and-fisheries.ec.europa.eu/news/decisive-progress-high-seas-biodiversity-treaty-2022-08-27_en
[54] https://ec.europa.eu/commission/presscorner/detail/en/ip_22_5064
[55] https://www.gov.uk/government/news/consultation-launched-to-support-sustainable-fishing-of-non-quota-fish-stocks

7. Macroeconomic Context

7.1. Marine fuel

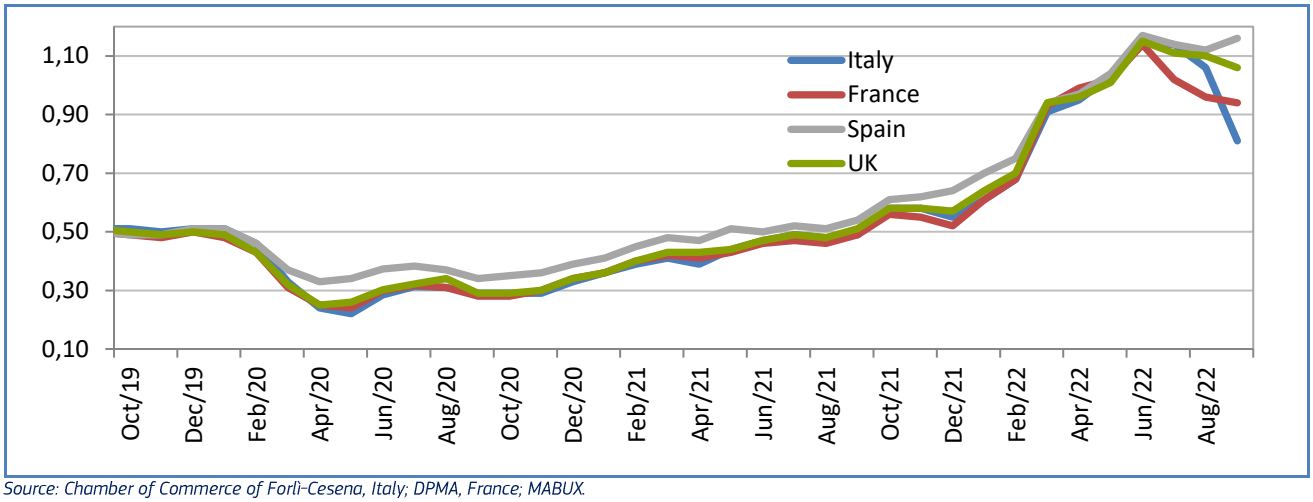
Average prices for marine fuel in **September 2022** ranged between 0,81 and 1,16 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices fell by an average of about 6,4% compared with the previous month, and they increased by an average of 95,6% compared with the same month in 2021.

Table 35. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Sep 2022	Change from Aug 2022	Change from Sep 2021
France *(ports of Lorient and Boulogne)*	0,94	-2%	92%
Italy *(ports of Ancona and Livorno)*	0,81	-24%	65%
Spain *(ports of A Coruña and Vigo)*	1,16	4%	115%
The UK *(ports of Grimsby and Aberdeen)*	1,06	-4%	108%

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

Figure 47. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

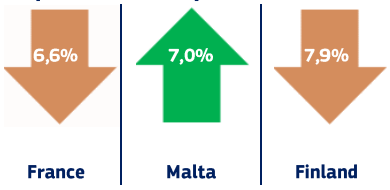


Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

7.2. Consumer prices

The EU annual inflation rate was 10,1% in August 2022, up from 9,8% in July 2022. In 2021, the rate was 3,2%.

Inflation: lowest rates in August 2022, compared with July 2022.



Inflation: highest rates in August 2022, compared with July 2022.

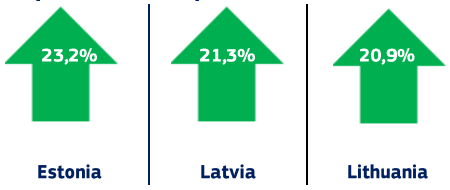


Table 36. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

	August 2020	August 2021	July 2022	August 2022	Change from July 2022	Change from August 2021
Food and non-alcoholic beverages	108,99	111,22	125,21	126,78	↑ 1,3%	↑ 14,0%
Fish and seafood	113,05	115,38	128,18	129,29	↑ 0,9%	↑ 12,1%

Source: Eurostat.

7.3. Exchange rates

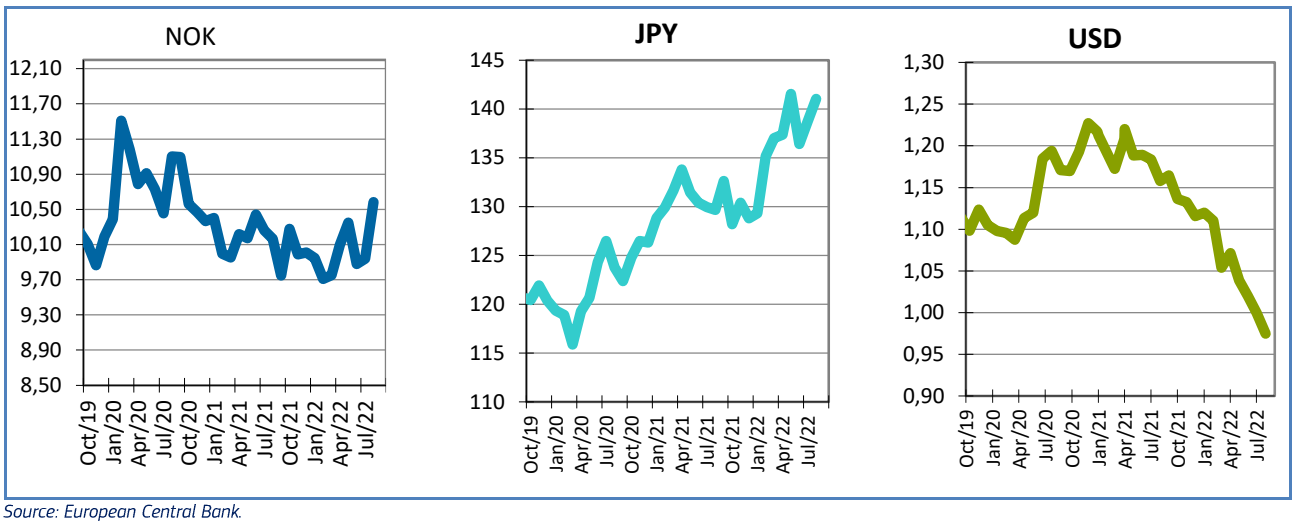
Table 37. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Sep 2020	Sep 2021	Aug 2022	Sep 2022
NOK	11,10	10,165	9,9388	10,5838
JPY	123,76	129,67	138,72	141,01
USD	1,1708	1,1579	1,0	0,9748

Source: European Central Bank.

In September 2022, compared to August, the Euro appreciated against the Norwegian krone (6,5%) and the Japanese yen (1,7%) and depreciated against the US dollar (2,5%),. In the current year, the Euro has fluctuated around 1,0264 against the US dollar. Compared with September 2021, the Euro has appreciated 4,1% against the Norwegian krone and 8,7% against the Japanese yen, and depreciated 15,8% against the US dollar.

Figure 48. **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, ICES, FishBase, NASCO

Consumption: EUROPANEL, FAO

Case studies: European Commission - DG AGRI, Eurostat, The Council of the European Union, EUROSTAT-COMEXT, FAO, Marine conservation society UK, EDF Seafood, World Bank, ICES, FranceAgriMer, Enquête Aquaculture, statista.com, TasteAtlas.com, Frontiers in marine science, Institute of marine research Norway, EUR-lex, Fresh fish daily

Global highlights: European Commission, gov.uk

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

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

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

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

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

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

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