European Commission

Monthly Highlights

No. 11 / 2020

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

In this issue

According to data collected by EUMOFA from 12 EU Member States, in September 2020 European pilchard and European sprat together accounted for 19% of the total first-sales value of the "Small pelagics" commodity group.

The price of frozen mackerel imported to the EU from the Faroe Islands increased in 2020 (up to October), while volume went down slightly. Price ranged from 1,00 to 2,00 EUR/kg.

In 2019, Portuguese consumers spent an average of 7,89 EUR for a kilogram of scabbardfish. A total of 2.273 tonnes of this fish species was consumed in the country in the same year.

The EU exported 16.329 tonnes of fisheries and aquaculture products to Brazil in 2019. The main species exported was cod, which covered 42% of total exports in volume.

Global production of megrim amounted to 18.329 tonnes in 2018, almost exclusively caught by the EU fleet (98% of world catch volume).

In November, the European Union, the Faroe Islands, Norway, Iceland, Greenland, the Russian Federation, and the United Kingdom reached an agreement on the 2021 management measures for blue whiting and Atlanto-Scandian herring in the North East Atlantic.

Read the latest EUMOFA publications on Recirculating Aquaculture Systems (RAS) and Blue Bioeconomy here.
The latest edition of the EU Fish Market 2020 is available here.

Contents

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

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1. First sales in Europe

During **January–September 2020**, 12 EU Member States (MS), Norway, and the United Kingdom reported first-sales data for 10 commodity groups[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-September 2020 compared to the same period in 2019

Increases in value and volume: Estonia and Lithuania were the only surveyed countries that recorded an increase in both first-sales value and volume. In Estonia it was mainly due to a higher supply of pike-perch, while in Lithuania it was due to higher supply of herring and sprat.

Decreases in value and volume: Belgium, Denmark, France, Italy, the Netherlands, Poland, Portugal, and Sweden all recorded decreases in value and volume. Poland stood out with the most significant decline in value due to a lower supply of highly-valued cod, while volume fell primarily due to sprat and herring. These negative trends were the result of restricted fishing opportunities in the Baltic Sea for 2020 laid down by Council Regulation (EU) 2019/1838[3].

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

	January – September 2018		January – September 2019		January – September 2020		Change from January – September 2019	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Belgium	10.163	43,78	10.045	42,94	8.934	41,65	-11%	-3%
Denmark	189.474	255,50	172.944	237,40	139.069	188,73	-20%	-20%
Estonia	32.563	7,87	38.877	8,63	39.476	11,07	2%	28%
France	141.554	470,67	134.042	454,85	114.658	384,49	-14%	-15%
Italy	71.399	264,60	71.425	278,79	62.425	235,90	-13%	-15%
Latvia	27.704	5,21	39.063	6,49	32.208	6,46	-18%	0%
Lithuania	1.218	0,95	721	0,58	1.378	0,62	91%	7%
Netherlands	278.735	415,93	197.728	296,56	179.081	264,39	-9%	-11%
Norway	2.274.323	1.795,35	2.099.609	1.889,26	2.208.764	1.776,18	5%	-6%
Poland	71.032	22,26	112.424	32,65	61.980	14,99	-45%	-54%
Portugal	93.588	197,48	97.383	211,75	77.381	177,05	-21%	-16%
Spain	373.566	1.028,69	376.346	1.066,55	385.690	1.046,51	2%	-2%
Sweden	168.144	78,54	141.021	69,40	94.211	57,83	-33%	-17%
UK	184.013	335,41	209.361	438,10	210.432	346,78	1%	-21%

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 and other molluscs and aquatic invertebrates, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, salmonids, small pelagics, tuna and tuna-like species, and other marine fish.
[2] First sales data updated on 16.11.2020.
[3] COUNCIL REGULATION (EU) 2019/1838 https://eur-lex.europa.eu/eli/reg/2019/1838/oj#ntc2-L_2019281EN.01000901-E0002

1.2. September 2020 compared to September 2019

Increases in value and volume: First sales increased in Denmark, Estonia, Latvia, Lithuania, Poland, Spain, and Sweden. Higher sales of herring were behind the sharp increases in Estonia, Latvia, Lithuania, Poland, and Sweden. This trend was due to Council Regulation (EU) 2019/1838, namely the expiry of a restriction within the regulation for cod fishing in subdivisions 25 and 26 in the Baltic Sea, which was in force from 1 May to 31 August. This expiry meant it was possible to conduct fishing activities targeting other species such as herring or sprat as of September.

Decreases in value and volume: First sales fell in Belgium, the Netherlands, Norway, Portugal, and the United Kingdom. The most significant decreases were observed in the Netherlands due to lower sales of herring.

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

	September 2018		September 2019		September 2020		Change from September 2019	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Belgium	1.110	4,48	1.263	4,98	1.134	4,88	-10%	-2%
Denmark	29.625	31,22	21.921	30,49	25.646	31,87	17%	5%
Estonia	1.454	0,44	3.878	0,93	5314	1,73	37%	85%
France	14.669	50,05	14.121	46,94	14.194	46,54	1%	-1%
Italy	8.296	23,96	8.544	26,94	8.328	28,58	-3%	6%
Latvia	2.318	0,40	3.893	0,62	4.975	1,08	28%	73%
Lithuania	31	0,03	8	0,01	271	0,09	3322%	582%
Netherlands	40.523	60,71	31.945	44,03	13.010	26,23	-59%	-40%
Norway	151.757	144,83	164.848	164,18	142.601	98,65	-13%	-40%
Poland	1.831	0,85	1.978	0,71	4.967	1,83	151%	157%
Portugal	18.358	26,30	17.029	25,48	14.181	23,96	-17%	-6%
Spain	36.932	100,13	36.356	100,64	41.229	103,74	13%	3%
Sweden	14.134	9,42	4.788	5,48	8.581	7,30	79%	33%
UK	18.889	36,75	31.122	52,66	30.399	44,26	-2%	-16%

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.*

The most recent weekly first-sales data **(up to week 50 of 2020)** are available via the EUMOFA website, and can be accessed **here**.

The most recent monthly first-sales data **for October 2020** are available via the EUMOFA website, and can be accessed **here**.

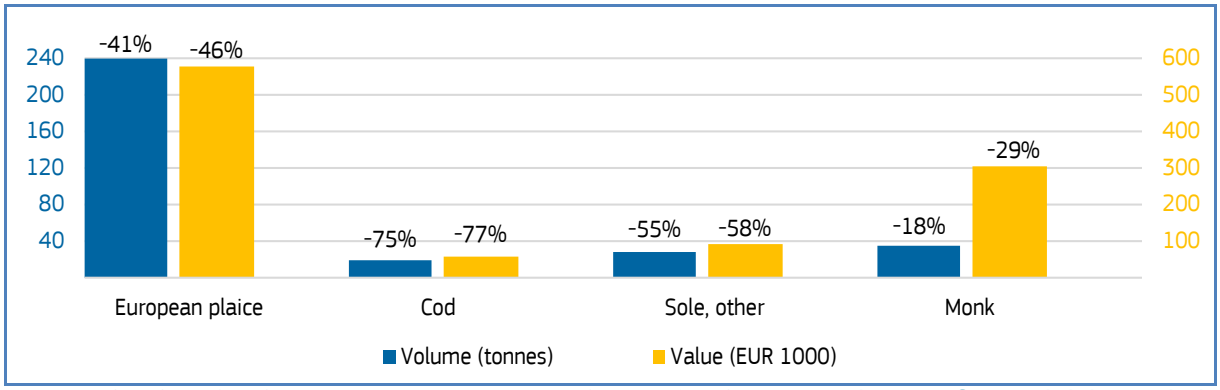
1.3. First sales in selected countries

First sales data analysed in this section are extracted from EUMOFA[4].

Table 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES[5] IN BELGIUM**

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2020 vs Jan-Sep 2019	EUR 41,7 million, -3%	8.934 tonnes, -11%	European plaice, turbot, other sole* (i.e. other than common sole), shrimp *Crangon* spp.
Sep 2020 vs Sep 2019	EUR 4,9 million, -2%	1.134 tonnes, -10%	European plaice, cod, other sole*, monk.

Figure 1. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM, SEPTEMBER 2020**

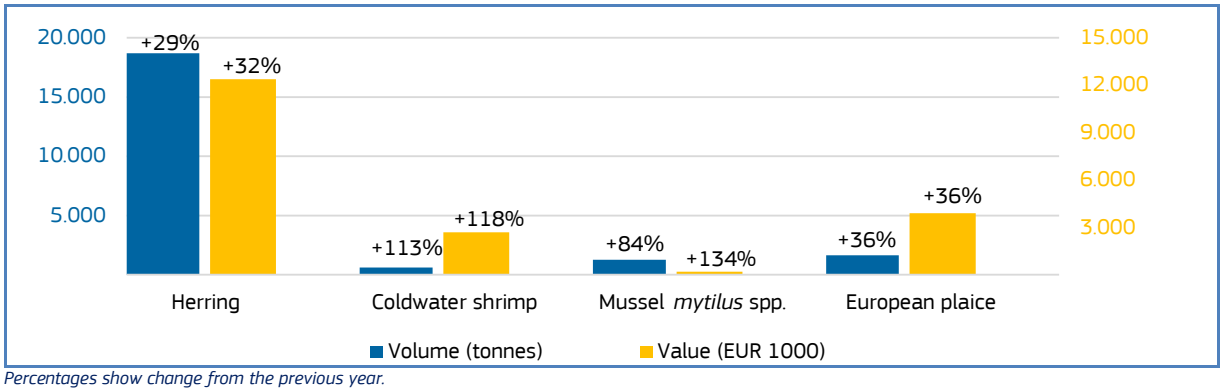


*Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies).*

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2020 vs Jan-Sep 2019	EUR 188,7 million, -20%	139.069 tonnes, -20%	Norway lobster, cod, saithe, herring, monk, mussel *Mytilus* spp., clam.
Sep 2020 vs Sep 2019	EUR 31,9 million, +5%	25.646 tonnes, +17%	Herring, coldwater shrimp, mussel *Mytilus* spp., European plaice.

Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, SEPTEMBER 2020**



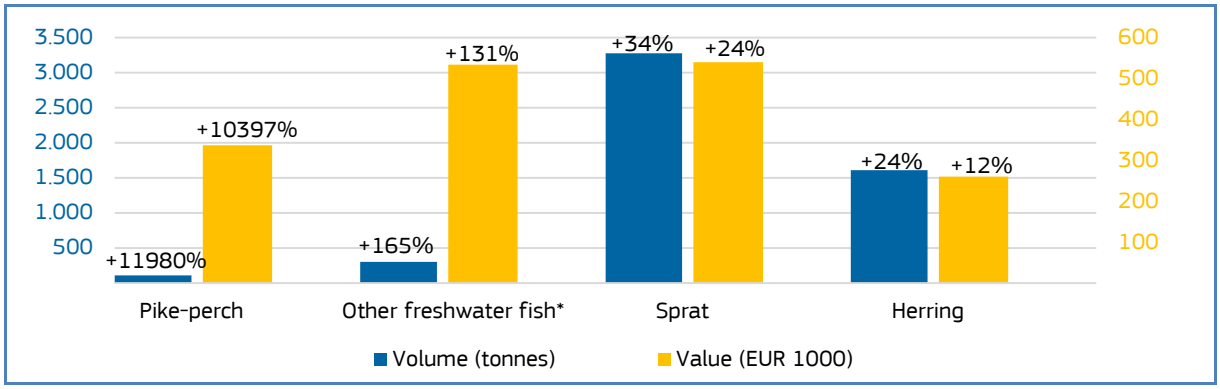
Percentages show change from the previous year.

[4] First-sales data updated on 16.11.2020.
[5] Data on fisheries and aquaculture products harmonised in EUMOFA allow comparisons along the different supply chain stages in EUMOFA.

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2020 vs Jan-Sep 2019	EUR 11,1 million, +28%	39.476 tonnes, +2%	Pike-perch, smelt, other freshwater fish*, herring.
Sep 2020 vs Sep 2019	EUR 1,7 million, +85%	5.314 tonnes, +37%	Pike-perch, other freshwater fish*, sprat, herring.

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, SEPTEMBER 2020**

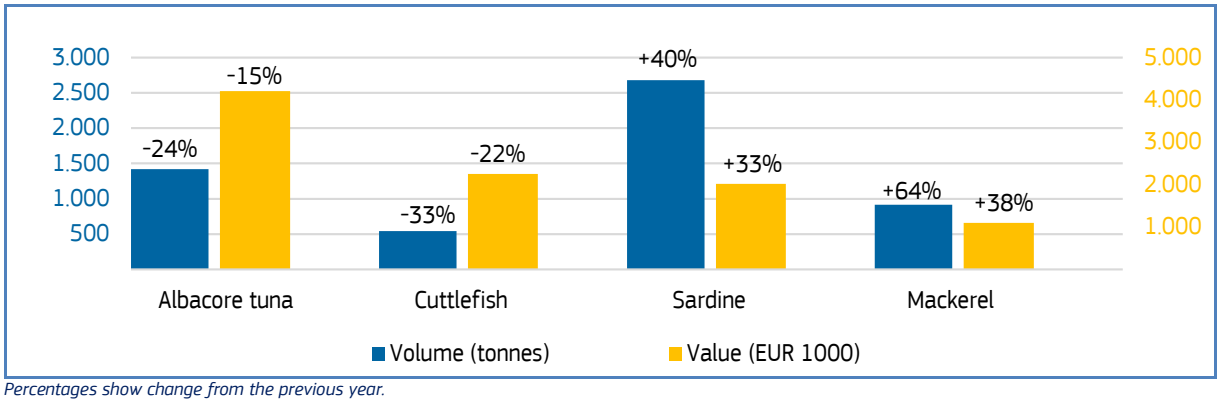


*Percentages show change from the previous year). *EUMOFA aggregation for species (Metadata 2, Annex 3: **http://eumofa.eu/supply-balance-and-other-methodologies**).*

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-Sep 2020 vs Jan-Sep 2019	EUR 384,5 million, -15%	114.658 tonnes, -14%	Monk, hake, squid, John dory, ling, anchovy.	During the last fishing season, fishing vessels only caught small anchovies which are not well-valued on the market; at the same time, the market for **sardine** was very attractive (and the fishing had been good). Thus, vessels that typically targeted both species opted to fish sardine rather than anchovy.
Sep 2020 vs Sep 2019	EUR 46,5 million, -1%	14.194 tonnes, +1%	**Value**: albacore tuna, cuttlefish. **Volume**: sardine, mackerel.	

Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, SEPTEMBER 2020**

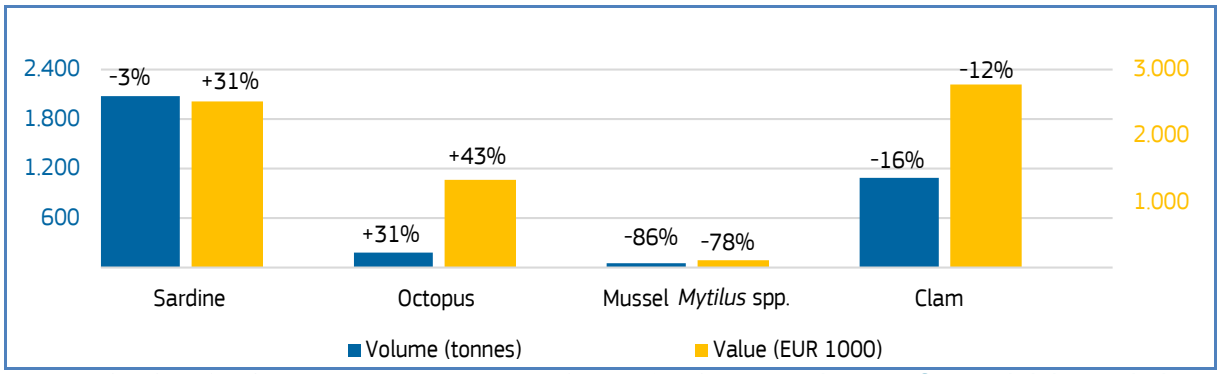


Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Sep 2020 vs Jan-Sep 2019	EUR 235,9 million, -15%	62.425 tonnes, -13%	Miscellaneous shrimps*, anchovy, clam, cuttlefish, octopus, sardine.	Due to the COVID-19 pandemic, there was a significant decrease in tourism as well as demand for fresh products from the HORECA sector. Therefore, demand for mussels has decreased, affecting first sales in both in terms of value and volume
Sep 2020 vs Sep 2019	EUR 28,6 million, +6%	8.328 tonnes, -3%	**Value**: sardine, octopus. **Volume**: mussel *Mytilus* spp., clam.	

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, SEPTEMBER 2020**

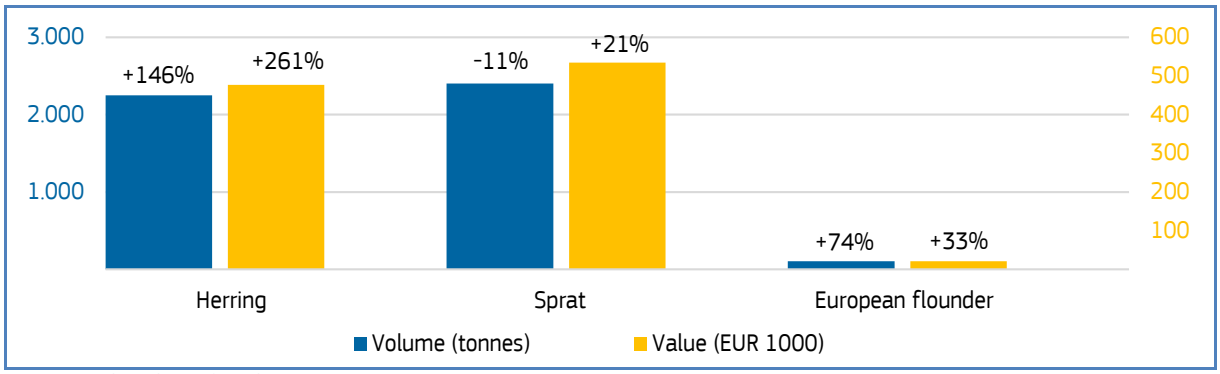


*Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies).*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2020 vs Jan-Sep 2019	EUR 6,5 million, 0%	32.208 tonnes, -18%	Sprat, smelt, European flounder, herring, cod.
Sep 2020 vs Sep 2019	EUR 1,1 million, +73%	4.975 tonnes, +28%	Herring, European flounder, sprat.

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, SEPTEMBER 2020**

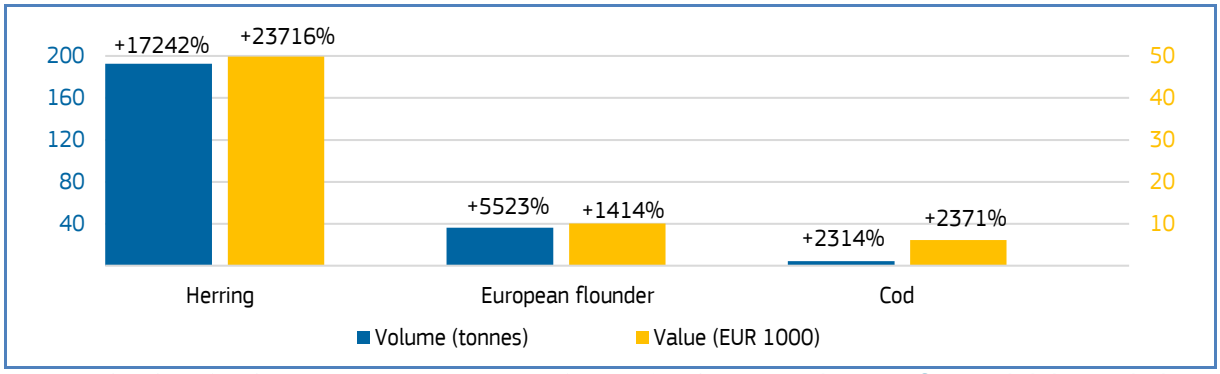


Percentages show change from the previous year.

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

Lithuania	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Sep 2020 vs Jan-Sep 2019	EUR 0,6 million, +7%	1.378 tonnes, +91%	Herring, sprat, other groundfish*, European flounder, pike-perch.	There were two main reasons behind the high increase in first sales of herring and European flounder. The first was the expiry of restrictions in fishing activities in the Baltic Sea (see Section 1.2). The second was that Latvian and Estonian fish processing companies have been expanding, and their respective owners, while investing in fish suppliers, purchased a subsidiary fish company in Lithuania. As herring catches in Lithuanian waters within the Baltic Sea are of higher quality the fishing activity focused in that area. The short trip between fishing areas and landing ports allowed Latvian and Estonian suppliers to reduce costs and increase profits while landing and selling herring in Lithuania.
Sep 2020 vs Sep 2019	EUR 0,09 million, +582%	271 tonnes, +3322%	Herring, European flounder, cod, sprat.	

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, SEPTEMBER 2020**

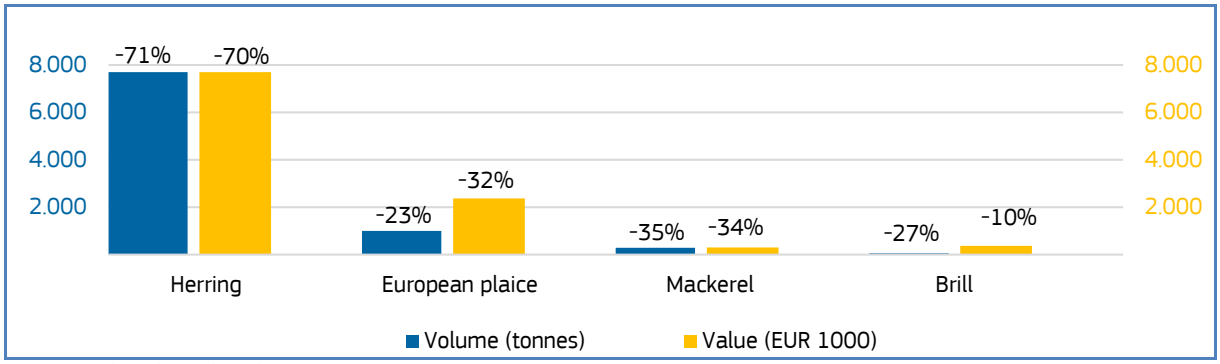


*Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: **http://eumofa.eu/supply-balance-and-other-methodologies**).*

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	Notes
Jan-Sep 2020 vs Jan-Sep 2019	EUR 264,4 million, -11%	179.081 tonnes, -9%	Atlantic horse mackerel, common sole, blue whiting, European plaice, Norway lobster.	Considering the first nine months of 2019 and 2020, it should be noted that the cumulative production of herring remains rather stable, with 56.900 tons in 2019 vs. 55.700 tons in 2020 (-2% from 2019. Lower sales observed in September 2020 can be seen as compensating the higher production levels in the first eight months of the year. In general, changes in Dutch pelagic production levels are mostly due to strategic behaviours as large vessels are able to move between stocks, including those in African and South Pacific waters.
Sep 2020 vs Sep 2019	EUR 26,2 million, -40%	13.010 tonnes, -59%	Herring, European plaice, mackerel, brill.	

Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, SEPTEMBER 2020**

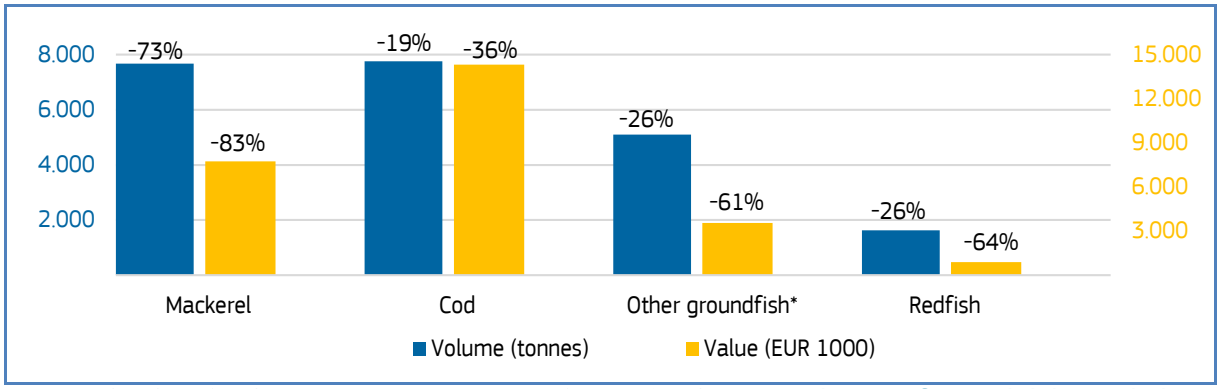


Percentages show change from the previous year.

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2020 vs Jan-Sep 2019	EUR 1.776,2 million, -6%	2.208.764 tonnes, +5%	**Value:** cod, coldwater shrimp, haddock. **Volume:** other groundfish*, mackerel, blue whiting.
Sep 2020 vs Sep 2019	EUR 98,7 million -40%	142.601 tonnes, -13%	Mackerel, cod, other groundfish*, redfish, other crustaceans.

Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, SEPTEMBER 2020**

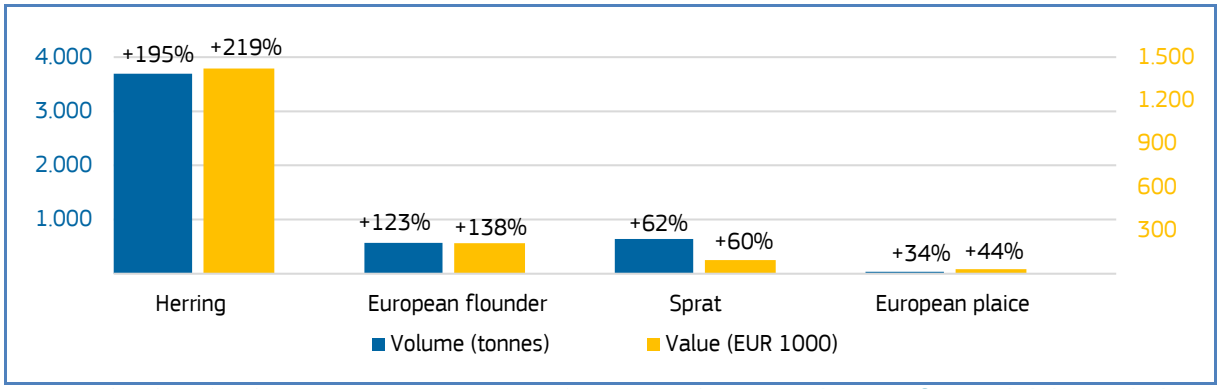


*Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: **http://eumofa.eu/supply-balance-and-other-methodologies**).*

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

Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Sep 2020 vs Jan-Sep 2019	EUR 15 million, -54%	61.980 tonnes, -45%	Cod, herring, sprat, European flounder.	The reasonable weather conditions in September 2020 and the existing resources in fishing capacity (expiration of the fisheries restriction set by the Council Regulation (EU) 2019/1838 are behind the high increase in first sales for herring.
Sep 2020 vs Sep 2019	EUR 1,8 million, +157%	4.967 tonnes, +151%	Herring, European flounder, sprat, European plaice.	

Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, SEPTEMBER 2020**

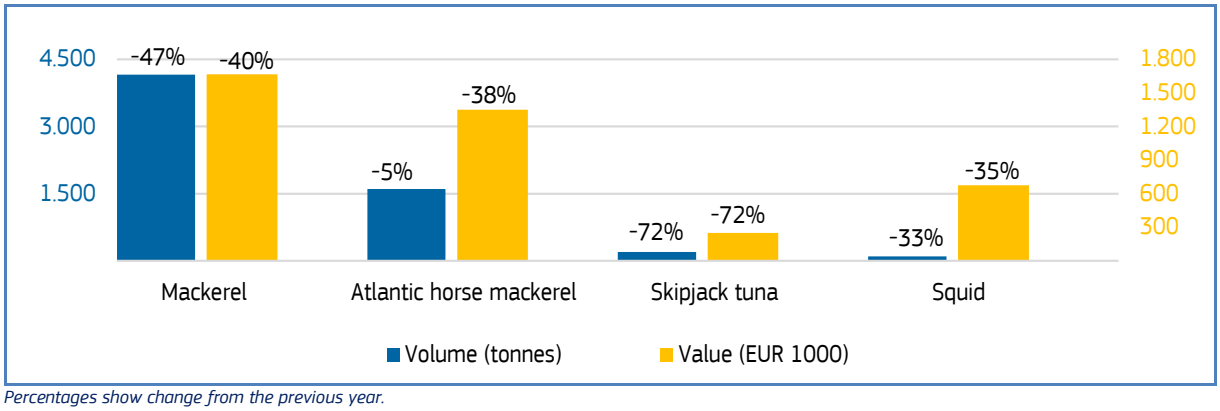


*Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: **http://eumofa.eu/supply-balance-and-other-methodologies**).*

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2020 vs Jan-Sep 2019	EUR 177 million, -16%	77.381 tonnes, -21%	Anchovy, mackerel, octopus, Atlantic horse mackerel.
Sep 2020 vs Sep 2019	EUR 24 million -6%	14.181 tonnes, -17%	Mackerel, Atlantic horse mackerel, skipjack tuna, squid.

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, SEPTEMBER 2020**



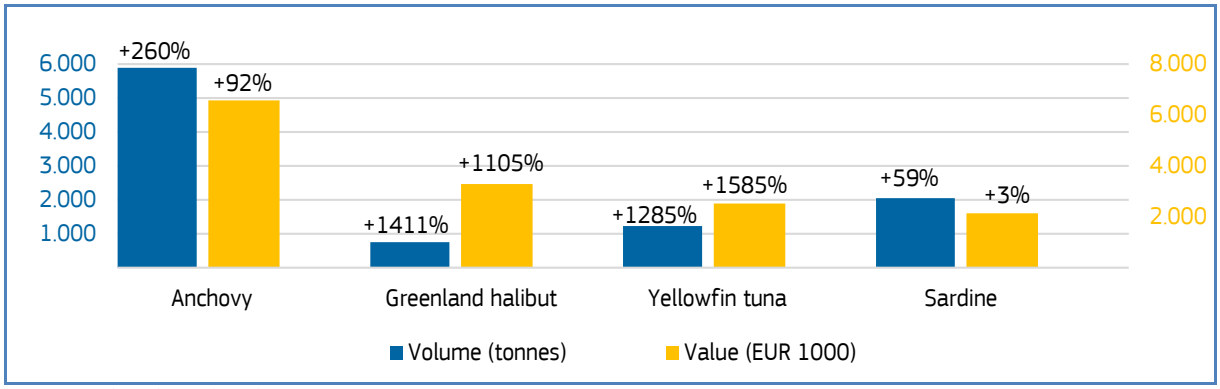
Percentages show change from the previous year.

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

Spain	First-sales value / trend in %	First-sales volume / trend %	Main contributing species	Notes
Jan-Sep 2020 vs Jan-Sep 2019	EUR 1.046,5 million, -2%	385.690 tonnes, +2%	**Value:** hake, octopus, clam. **Volume**: squid, mackerel, yellowfin tuna.	The good biological status of anchovy (abundance well above the biomass limit) is behind the significant increase in catches, and so in first-sales volume[6]. As a side effect, the size of the fish caught was smaller, affecting its market value.
Sep 2020 vs Sep 2019	EUR 103,7 million +3%	41.229 tonnes, +13%	Anchovy, Greenland halibut, yellowfish tuna, sardine.	

[6] https://www.azti.es/en/proyectos/bioman-y-juvena/

Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, SEPTEMBER 2020**

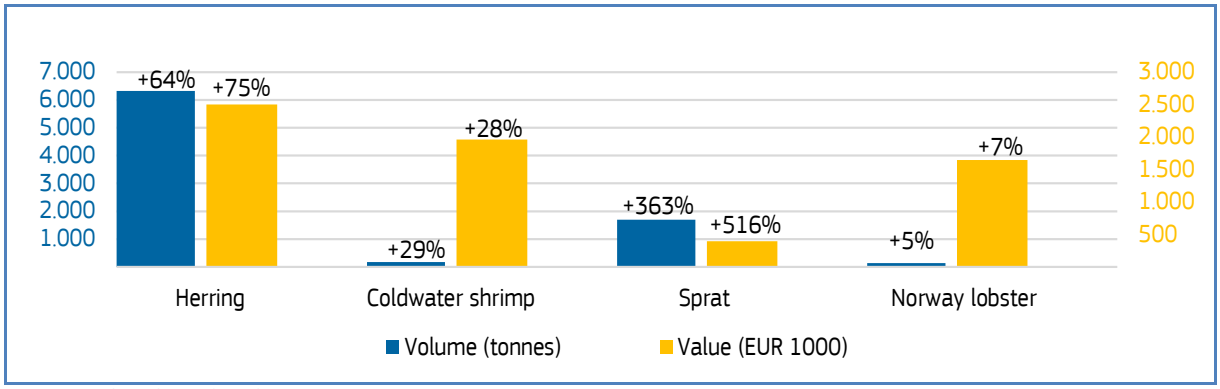


Percentages show change from the previous year.

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

Sweden	First-sales value / trend in %	First-sales volume / trend %	Main contributing species	Notes
Jan-Sep 2020 vs Jan-Sep 2019	EUR 57,8 million, -17%	94.211 tonnes, -33%	Herring, sprat, cod, Norway lobster.	The reasonable weather conditions in September 2020, the existing resources in fishing capacity and Total Allowable Catches (including the expiration of restrictions laid down by the Council Regulation (EU) 2019/1838) satisfied the market demand for both herring and sprat, which in September 2020 was higher than in September 2019.
Sep 2020 vs Sep 2019	EUR 7,3 million +33%	8.581tonnes, +79%	Herring, coldwater shrimp, Norway lobster, sprat.	

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, SEPTEMBER 2020**

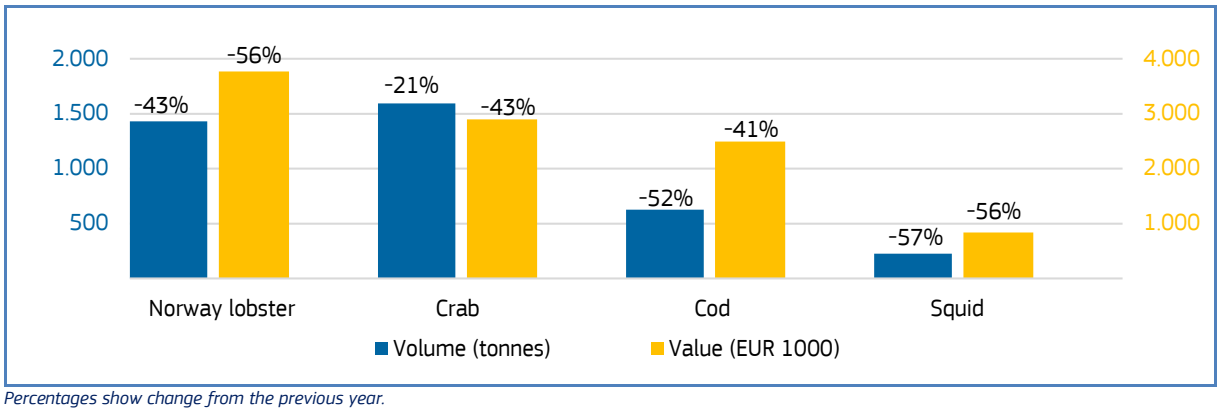


Percentages show change from the previous year.

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

the United Kingdom	First-sales value / trend %	First-sales Volume / trend %	Main contributing species
Jan-Sep 2020 vs Jan-Sep 2019	EUR 346,8 million, -21%	210.432 tonnes, +1%	**Value:** Norway lobster, crab, cod. **Volume:** mackerel, blue whiting, clam.
Sep 2020 vs Sep 2019	EUR 44,3 million, -16%	30.399 tonnes, -2%	Norway lobster, crab, cod, squid.

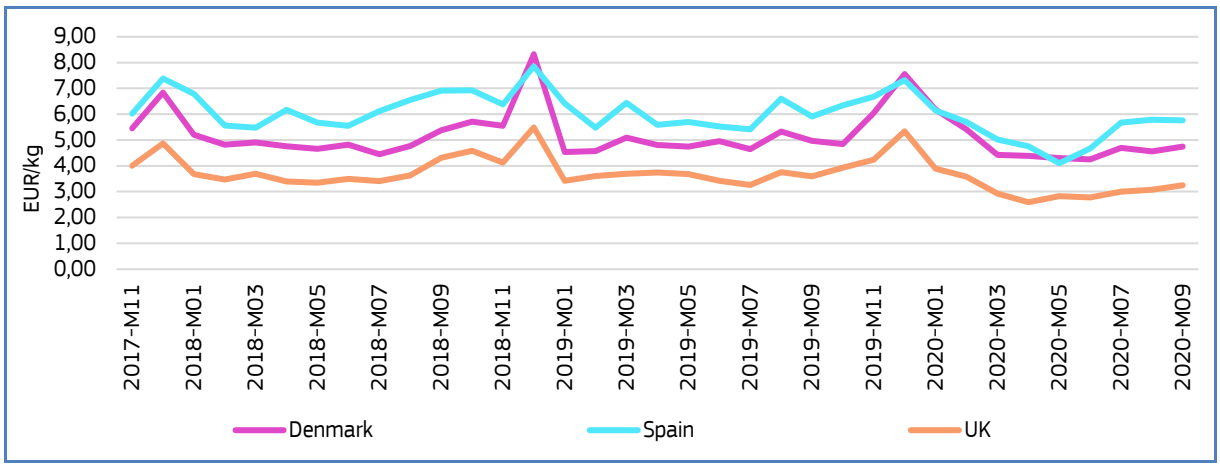
Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, SEPTEMBER 2020**



Percentages show change from the previous year.

1.4. Comparison of first-sales prices of selected species in selected countries[7]

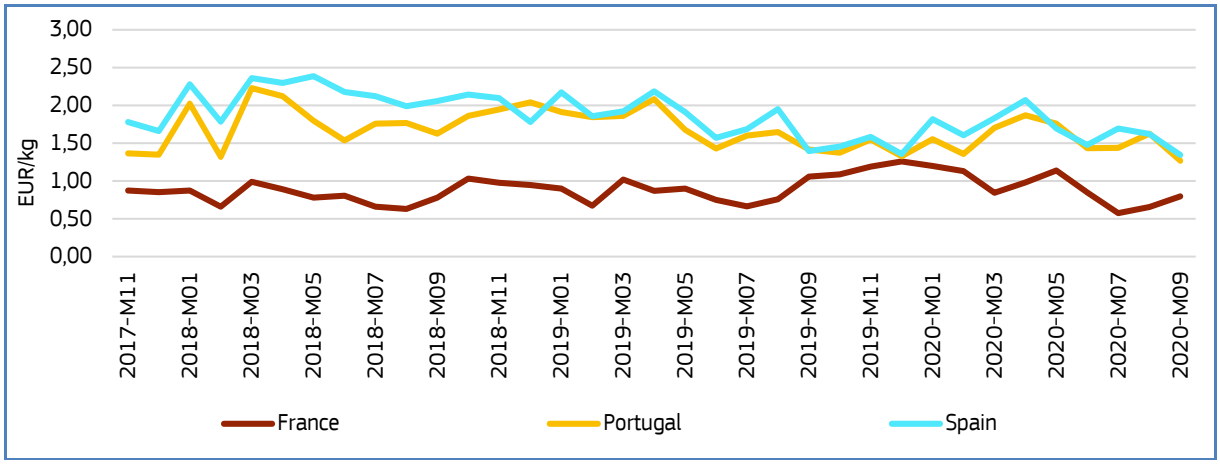
Figure 15. **FIRST-SALES PRICES OF MONK IN DENMARK, SPAIN AND THE UK**



Denmark, **Spain** and the **United Kingdom** are among the main EU countries in terms of first sales of **monk**. Average prices in September 2020 (the most recent available data) were 4,74 EUR/kg in Denmark (up by 4% from the previous month and down by 5% from the previous year), and 5,76 EUR/kg in Spain (unchanged from August 2020 and down by 2% from September 2019). In the UK, the average price was 3,25 EUR/kg (6% up from August 2020 and 10% down from September 2019). In September 2020, first-sales volume decreased by 4% in both Denmark and Spain, and by 8% in the UK, relative to the previous year. Monk fisheries are seasonal, with different peaks for each of the three countries. Over the 36-month period, prices decreased in all three markets, most notably in the UK. During the same period, supply fell in Denmark and Spain, and increased slightly in the UK.

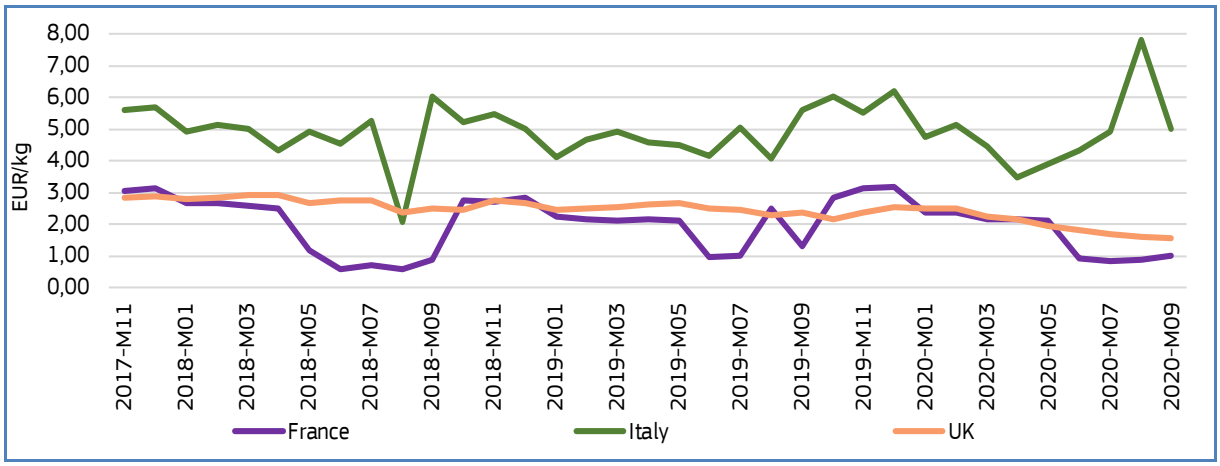
[7] First sales data updated on 25.11.2020.

Figure 16. **FIRST-SALES PRICES OF POUTING IN FRANCE, PORTUGAL AND SPAIN**



EU first sales of **pouting** occur in multiple countries, including **France**, **Portugal**, and **Spain**. In September 2020, the average first-sales prices of pouting were: 0,80 EUR/kg in France (up by 22% from the previous month, and down by 24% from the previous year); 1,27 EUR/kg in Portugal (down from both the previous month and year by 22% and 10%, respectively); and 1,35 EUR/kg in Spain (17% lower than August 2020, and 4% lower than September 2019). In September 2020, supply decreased in Portugal (–3%), and increased in France (+23%) and Spain (+5%) relative to September 2019. Over the past 36 months, pouting prices have increased in France, and decreased in Portugal and Spain. Over the same period, supply increased in Spain, and decreased in France and Portugal. First-sales volume is seasonal, with similar peaks (January-February and September-October) seen in all three countries.

Figure 17. **FIRST-SALES PRICES OF SCALLOP IN FRANCE, ITALY AND THE UK**

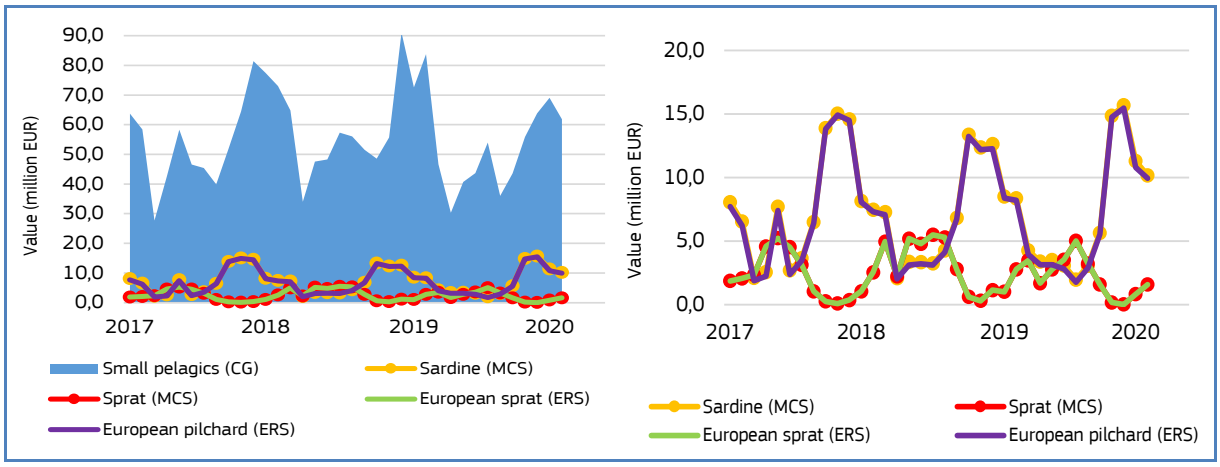


In Europe, first sales of **scallop** (MCS) occur predominantly in **France**, as well as in **Italy** and the **United Kingdom**. In September 2020, the average first-sales prices of scallop were: 1,00 EUR/kg in France (up by 13% from August 2020 and down by 23% from September 2019); 5,00 EUR/kg in Italy (down from both the previous month and year by 36% and 11%, respectively); 1,55 EUR/kg in the UK (4% lower than August 2020, and 35% lower than September 2019). In France and the UK scallop (MCS) represents mainly great Atlantic scallop and to a lesser extent queen scallop. In Italy, supply is predominately made of great Mediterranean scallop, whose price is much higher. In September 2020, supply increased in all three countries compared to September 2019: in France by 199%, Italy by 25%, and the UK by 74%. Over the past 36-month period, prices were stable in Italy (despite some significant monthly fluctuations) and decreased in France and the UK. Over the past three years, supply decreased slightly in France, and was stable in Italy and the UK. Supply is seasonal, with different peaks across the three countries: December in France (fishery closure from 15 May-30 September[8]), May–June in Italy, and October-November in the UK.

[8] https://www.legifrance.gouv.fr/loda/id/JORFTEXT000000787260/2020-10-17/

1.5. Commodity group of the month: small pelagics[9]

Figure 18. **FIRST-SALES COMPARISON AT CG LEVEL, MCS LEVEL, AND ERS LEVEL FOR REPORTING MEMBER STATES COUNTRIES[10], OCTOBER 2017 - SEPTEMBER 2020**



The "**small pelagics**" commodity group (CG[11]) showed the highest first sales (in both value and volume terms) out of the 10 CGs recorded in September 2020[12]. First sales reached a value of EUR 61,9 million and a volume of 84.352 tonnes, representing decreases of 15% and 7%, respectively, from September 2019. In the past 36 months, the highest first-sales value of small pelagics was registered at EUR 91,1 million (August 2019).

The small pelagics commodity group includes eight main commercial species (MCS): anchovy, herring, Atlantic horse mackerel, other horse mackerel, mackerel, miscellaneous small pelagics, pilchard/sardine, and sprat.

At Electronic Recording and Reporting System (ERS) level, European pilchard (16%) and European sprat (3%) together accounted for 19% of the total small pelagics' first-sales value recorded in September 2020.

1.6. Focus on European pilchard

European pilchard, commonly known as pilchard or sardine (*Sardina pilchardus*), is the most commonly distributed small pelagics fish species in European waters. It is a fast-growing migratory pelagic species typically found at depths of 25–55 m during the day, and 10–35 m at night. It has high fecundity, can reach lengths of 25 cm and lives between 10–12 years on average. The species feeds mainly on plankton and crustaceans. European pilchard is found in the Northeast Atlantic from Norway and Scotland to Senegal, and is also found in the Mediterranean and the Black Sea. The species breeds at the age of 1-2 years. Depending on sea basin topography and temperature, breeding may occur in inshore areas at depths of 20-25m, or as far out as 100km from the shore[13].

European pilchard is caught mostly by purse seiners and pelagic trawlers, as well as by small-scale vessels. In the EU Atlantic waters, two stocks are relevant to fisheries management: the Northern stock (ICES Subareas VII and VIIIa, b, d) fished mainly by France, Spain, the Netherlands, and the UK, and the Southern stock (ICES Subarea VIIIc and Division IXa) fished by purse seiners from Croatia, Italy, Spain and Portugal. The species is commercially important for fisheries and processing industries (canning) of the above-mentioned countries[14]. So far, pilchard stocks have not been subject to TACs and quotas. Management measures for the Northern stock include technical measures and limits on purse seine licensing in French waters. Management measures for the Southern stock include technical measures and limits on fishing effort and catches (closure periods and

[9] First sales data updated on 16.11.2020.
[10] Norway and the UK excluded from the analyses.
[11] Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies
[12] More data on commodity groups can be found in Table 1.2 of the Annex.
[13] http://www.fao.org/fishery/species/2910/en
[14] http://www.fao.org/fishery/species/2910/en

maximum volume of landings). In the EU, the minimum size is 11 cm or 55 specimens per kg. Pilchard is caught year-round, with peaks in summer[15].

On the market, pilchard is mostly found fresh and canned, as well as frozen. It is also sold dried, salted, and smoked.

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

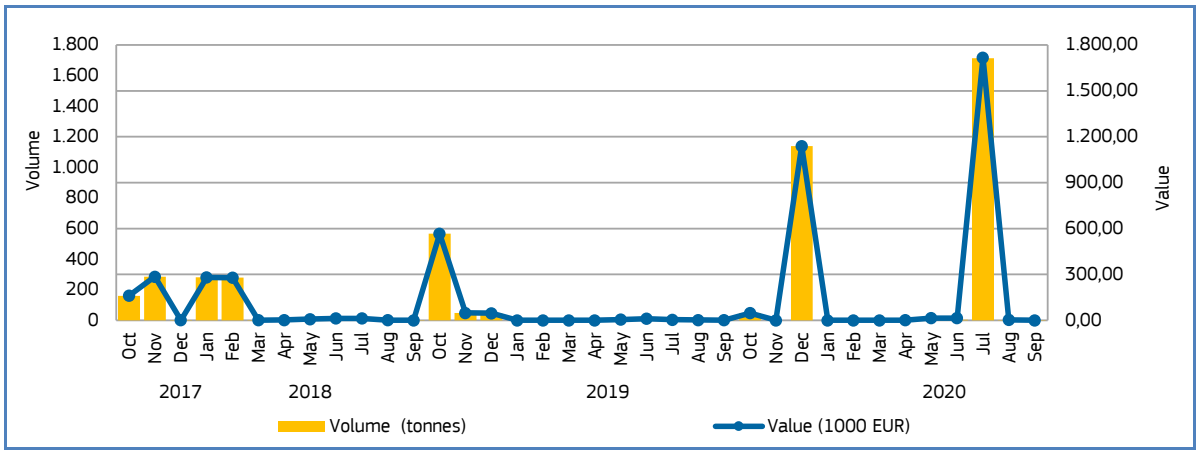
First sales: MH 9/2018 (France, Italy, the United Kingdom), MH 8/2017 (France, Greece, Italy), MH 3/2016 (Greece), MH 5/2015 (Portugal), MH February/2013 (Portugal), MH July/2013 (Greece).
Topic of the month: MH 6/2016 "Sardine market in the EU".
Consumption: MH 4/2020 (France, Portugal, Spain), MH 1/2018 (France, Portugal, Spain), MH 1/2016 (Portugal, Spain, the United Kingdom), MH 3/2015 (Greece, Portugal, Spain, the United Kingdom).

Selected countries

Table 17. **COMPARISON OF EUROPEAN PILCHARD FIRST-SALES PRICES, MAIN PLACES OF SALE AND CONTRIBUTION TO OVERALL SALES OF SMALL PELAGICS IN THE NETHERLANDS, PORTUGAL, AND SPAIN.**

European pilchard		Changes in first sales Jan-Sep 2020 (%)		Contribution of European pilchard to total small pelagics first sales in September 2020 (%)	Principal places of sale Jan-Sep 2020 in terms of first-sales value
		Compared to Jan-Sep 2019	Compared to Jan-Sep 2018		
Netherlands	**Value**	+7450%	+193%	0,004%	Scheveningen, IJmuiden/Velsen, Urk, Vlissingen.
	Volume	+14180%	+196%	0,001%	
Portugal	**Value**	+19%	-3%	38%	Peniche, Sesimbra, Matosinhos.
	Volume	+57%	+44%	26%	
Spain	**Value**	-13%	-12%	12%	Isla Cristina, A Coruña, Barbate de Franco.
	Volume	+8%	+7%	9%	

Figure 19. **EUROPEAN PILCHARD: FIRST SALES IN THE NETHERLANDS, OCTOBER 2017–SEPTEMBER 2020**



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

Over the past 36 months, the highest first sales of European pilchard in **the Netherlands** occurred in December 2019 and July 2020. Considering the low volume of pilchard caught by the Dutch fleet, strong fluctuations in first-sales value and volume occurred regularly in the observed period.

Figure 20. **FIRST SALES: COMPOSITION OF SMALL PELAGICS (ERS LEVEL) IN THE NETHERLANDS IN VALUE AND VOLUME, SEPTEMBER 2020**

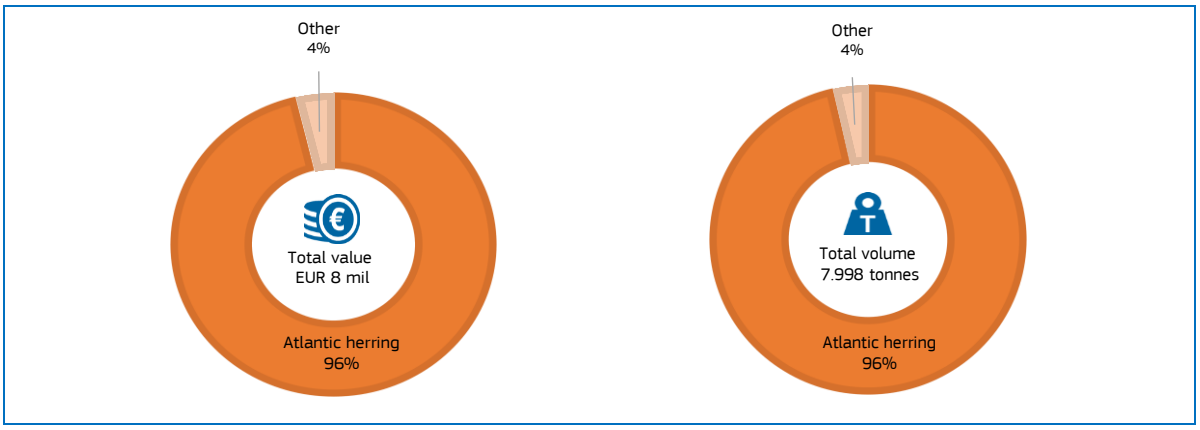
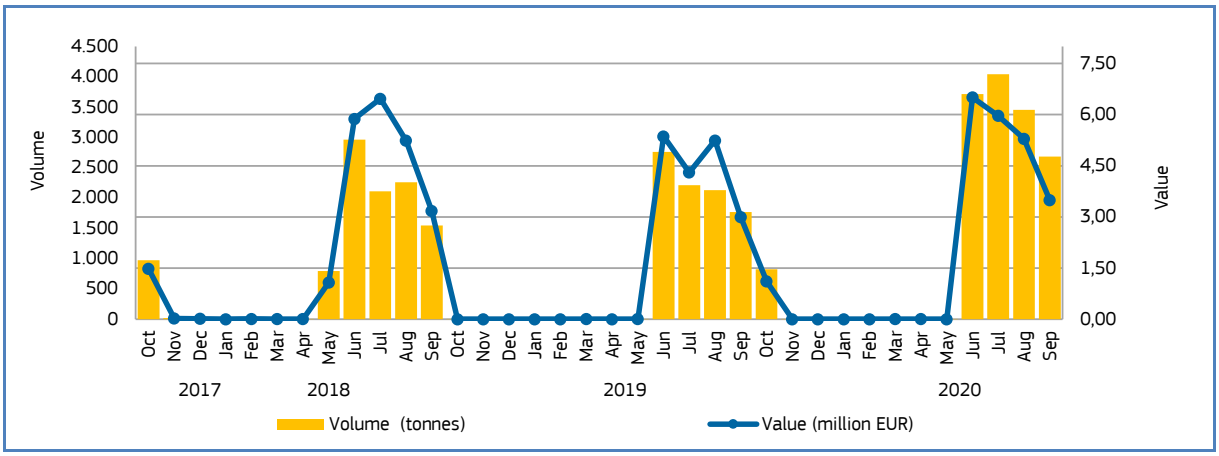


Figure 21. **EUROPEAN PILCHARD: FIRST SALES IN PORTUGAL, OCTOBER 2017–SEPTEMBER 2020**



Over the past 36 months, the highest first sales of European pilchard in Portugal occurred in the second semester of each year. The good biological status of pilchard stocks led to higher catches in 2020 compared with 2019 and 2018. The Portuguese purse seine fishery primarily targets pilchard, but in recent years has also targeted chub mackerel and horse mackerel, due to lower fishing opportunities for pilchard.

Figure 22. **FIRST SALES: COMPOSITION OF SMALL PELAGICS (ERS LEVEL) IN PORTUGAL IN VALUE AND VOLUME, SEPTEMBER 2020**

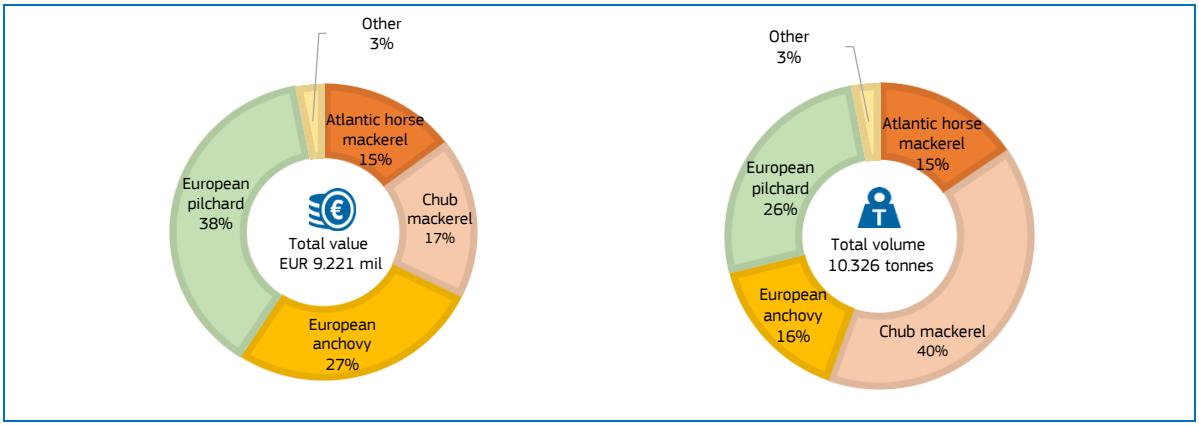
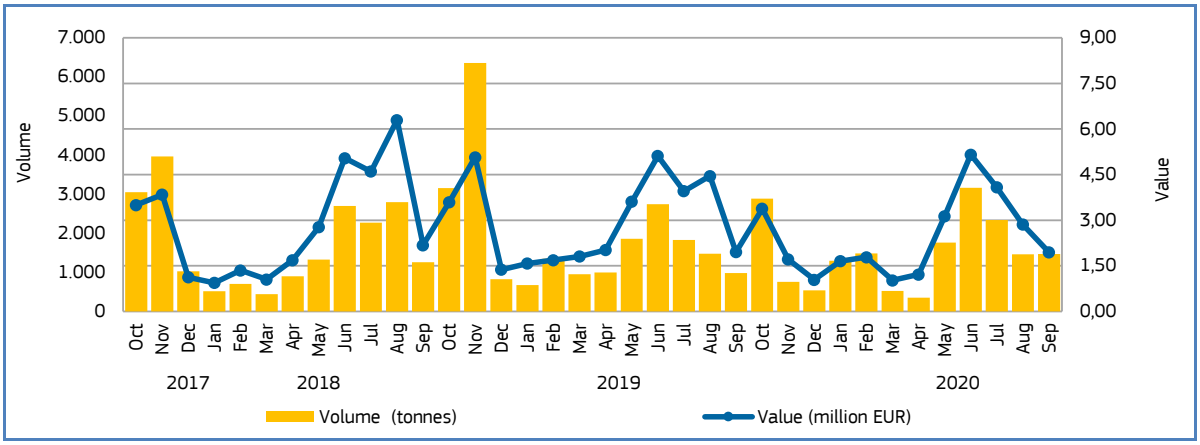
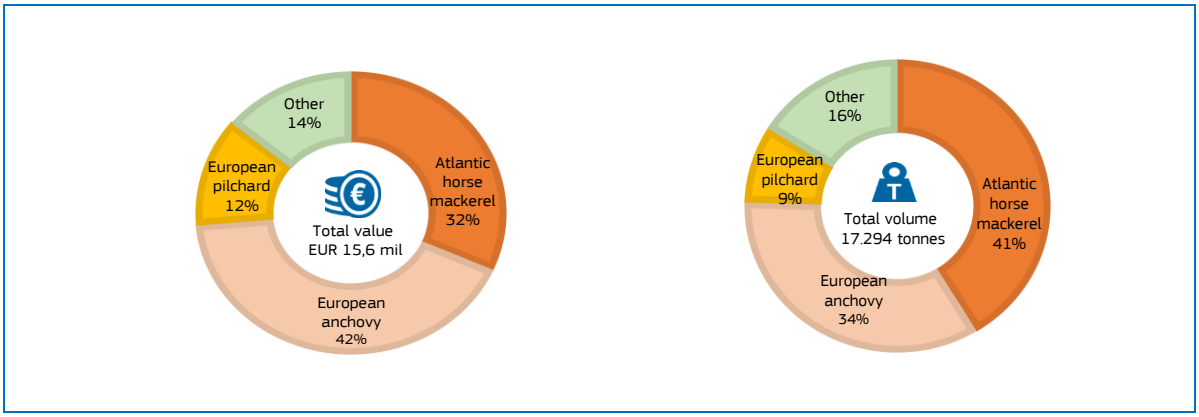


Figure 23. **EUROPEAN PILCHARD: FIRST SALES IN SPAIN, OCTOBER 2017–SEPTEMBER 2020**



In **Spain** over the past 36 months, the highest first sales of European pilchard occurred from March to September every year. The Spanish purse seine fleet targets pilchard mainly in spring and autumn. The majority of European pilchard landings are made by purse seiners. The remainder is taken as by-catch in the bottom trawl fishery and in local small-scale fisheries[16].

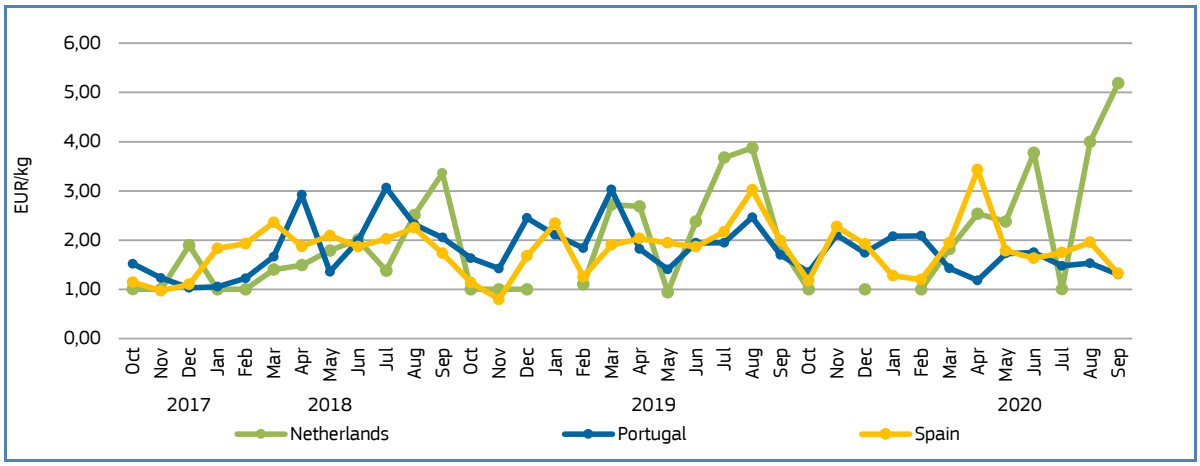
Figure 24. **FIRST SALES: COMPOSITION OF SMALL PELAGICS (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, SEPTEMBER 2020**



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

Price trend

Figure 25. **EUROPEAN PILCHARD: FIRST-SALES PRICES IN SELECTED COUNTRIES, OCTOBER 2017–SEPTEMBER 2020**



Over the 36-month observation period (October 2017 to September 2020), the average first-sales price of European pilchard in **the Netherlands** was 1,99 EUR/kg, 11% higher than in **Portugal** and **Spain** (both 1,80 EUR/kg).

In **the Netherlands** in September 2020, the average first-sales price of European pilchard (5,19 EUR/kg) increased by 176% from September 2019 and by 54% compared with September 2018. During the past 36 months, average price ranged from 0,94 EUR/kg for 5.000 kg in May 2019, to 5,19 EUR/kg for 61 kg in September 2020.

In **Portugal** in September 2020, the average first-sales price of European pilchard (1,30 EUR/kg) decreased by 23% compared to September 2019, and by 37% from September 2018. During the observed period, the lowest average price of 1,03 EUR/kg was seen in December 2017, when volume was roughly 13 tonnes, while the highest average price was recorded in July 2018 at 3,07 EUR/kg for 2109 tonnes.

In **Spain** in September 2020, the average first-sales price of European pilchard (1,32 EUR/kg) decreased by 34% compared to September 2019 and by 24% from September 2018. During the observed period, the lowest average price (0,80 EUR/kg for approximately 6.358 tonnes) was seen in November 2018, while the highest average price was recorded in April 2020 at 3,43 EUR/kg, for 354 tonnes.

1.7. Focus on European sprat

European sprat (*Sprattus sprattus*) is a pelagic marine species found in inshore schools. It is a short-lived species with a tolerance of low-salinity waters, and feeds on zooplankton. Sprat migrates to spawning grounds in spring and summer and moves to the water surface at night. Some spawning may take place throughout the year, near the coast or up to 100 km from the shore[17]. Sprat is distributed in the Northeast Atlantic (from the North Sea and Baltic Sea, south to North Africa) and in the Mediterranean and Black Seas[18].

The species is important in the North Sea and Baltic Sea fisheries and it presents an important food source for cod – meaning that the condition of sprat stocks has a high impact on cod stocks. Catches are made by pelagic trawlers using small-meshed nets. The sprat stock in the Baltic Sea is longer-lived than the North Sea stock. Sprat is subject to total allowable catches (TACs), which are shared among 12 Member States (in the North and Baltic seas). Total allowable

[17] http://www.fao.org/fishery/species/2102/en
[18] https://mare.istc.cnr.it/fisheriesv2/species_en?sn=34462

catches for sprat in waters of ICES Subarea 4 (the North Sea) and in ICES Division 3a (Skagerrak and Kattegatt) were set at 207.807 tonnes for the period from 1 July 2020 to 30 June 2021[19].

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

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

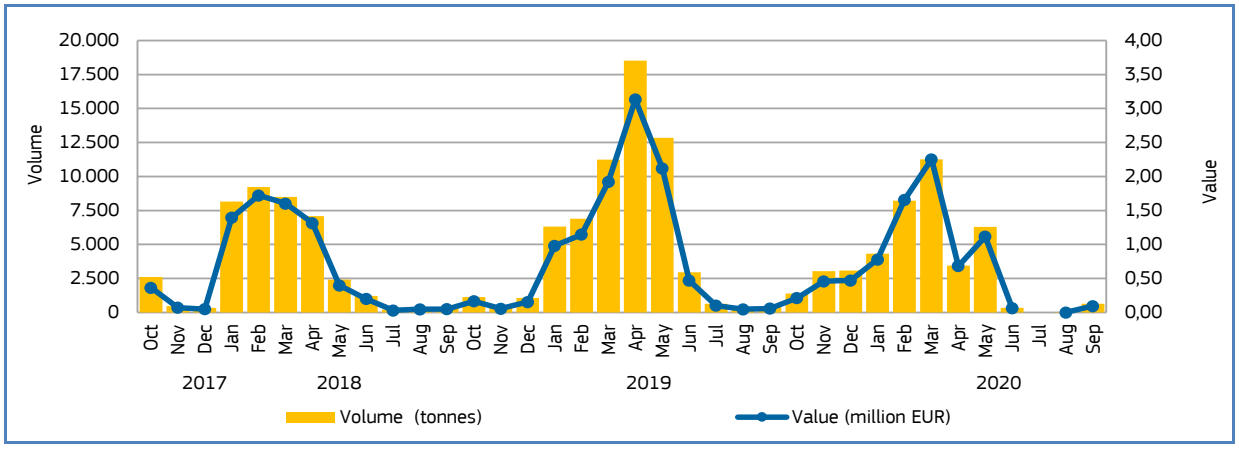
First sales: MH 9/2018 (Estonia, Latvia, Sweden), MH 4/2017 (Estonia, Latvia, Sweden), MH 5/2016 (Latvia), MH 5/2015 (Latvia); MH 3/2015 (Sweden), MH 5/2014 (Latvia) MH February/2013 (Sweden).

Selected countries

Table 18. **COMPARISON OF EUROPEAN SPRAT FIRST-SALES PRICES, MAIN PLACES OF SALES AND CONTRIBUTION TO OVERALL SALES OF SMALL PELAGICS IN POLAND, THE NETHERLANDS AND SWEDEN**

European sprat		Changes in first sales Jan-Sep 2020 (%)		Contribution of European sprat to total small pelagics first sales in September 2020 (%)	Principal places of sales in Jan-Sep 2020 in terms of first-sales value
		Compared to Jan-Sep 2019	Compared to Jan-Sep 2018		
Poland	**Value**	-33%	-2%	6%	Hel, Kolobrzeg, Wladyslawowo.
	Volume	-43%	-8%	15%	
Netherlands	**Value**	+51%	+27304%	0% (no sales recorded)	IJmuiden/Velsen, Scheveningen, Vlissingen.
	Volume	+51%	+27303%	0% (no sales recorded)	
Sweden	**Value**	-39%	-28%	13%	N/A (unspecified)
	Volume	-44%	-36%	21%	

Figure 26. **EUROPEAN SPRAT: FIRST SALES IN POLAND, OCTOBER 2017-SEPTEMBER 2020**



In **Poland**, first sales fluctuated over the past 36 months, with the highest sales occurred in July 2020. Sprat catches are typically seasonal and are mainly concentrated in the first half of the year, when Baltic fleets target sprat for human consumption.[20] Most sprat is fished by pelagic trawlers exceeding 24 m in length.

[19] Council Regulation (EU) 2020/900 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32020R0900
[20] http://www.europarl.europa.eu/RegData/etudes/note/join/2011/460040/IPOL-PECH_NT(2011)460040_EN.pdf

Figure 27. **FIRST SALES: COMPARISON OF SMALL PELAGICS (ERS LEVEL) IN POLAND IN VALUE AND VOLUME, SEPTEMBER 2020**

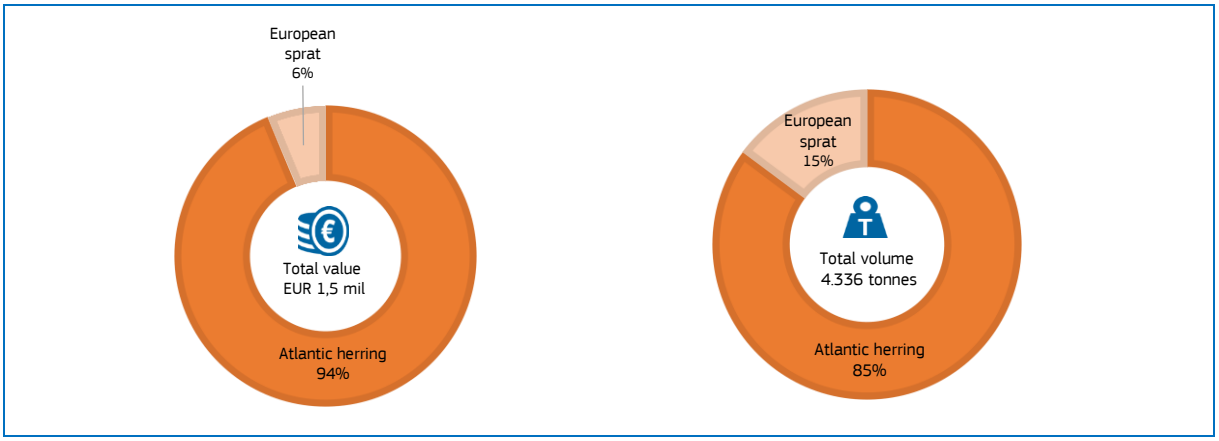
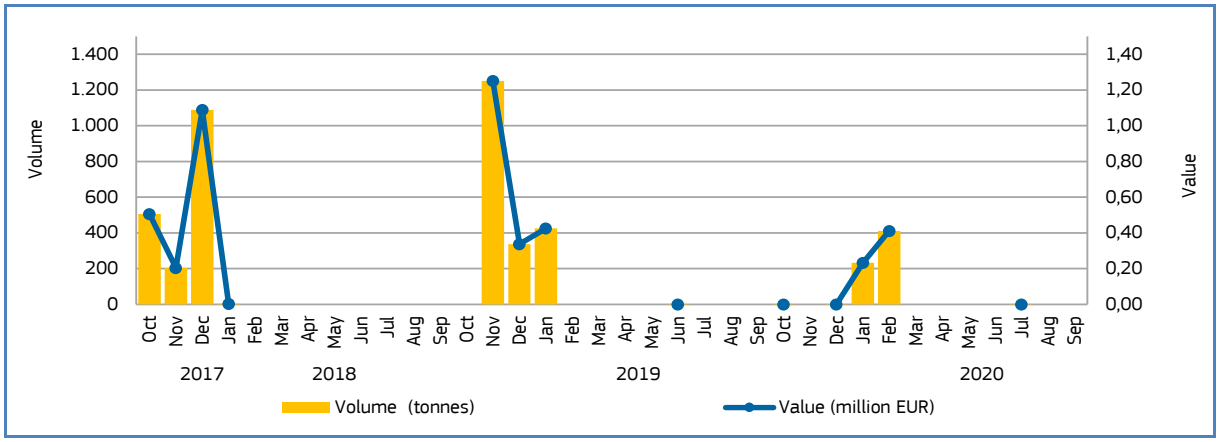
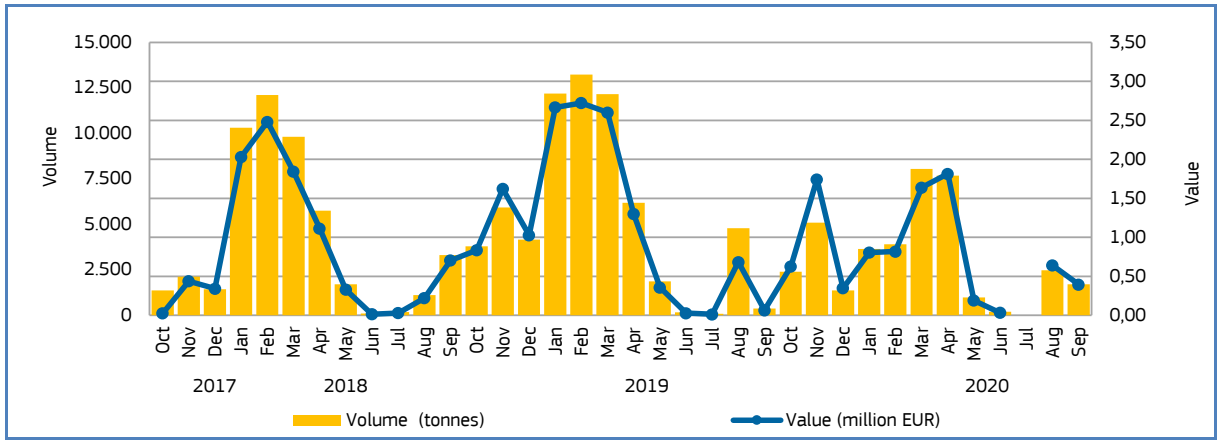


Figure 28. **EUROPEAN SPRAT: FIRST SALES IN THE NETHERLANDS, OCTOBER 2017–SEPTEMBER 2020**



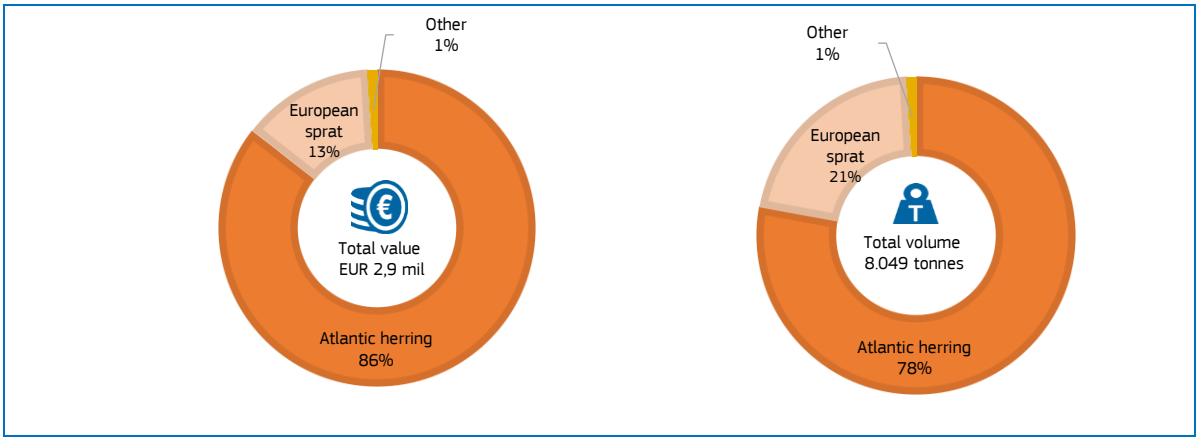
In **the Netherlands**, commercial fishing of European sprat fluctuates throughout the year, with the highest first sales typically occurring during autumn and winter, when the fishery is at its peak.

Figure 29. **EUROPEAN SPRAT: FIRST SALES IN SWEDEN, OCTOBER 2017–SEPTEMBER 2020**



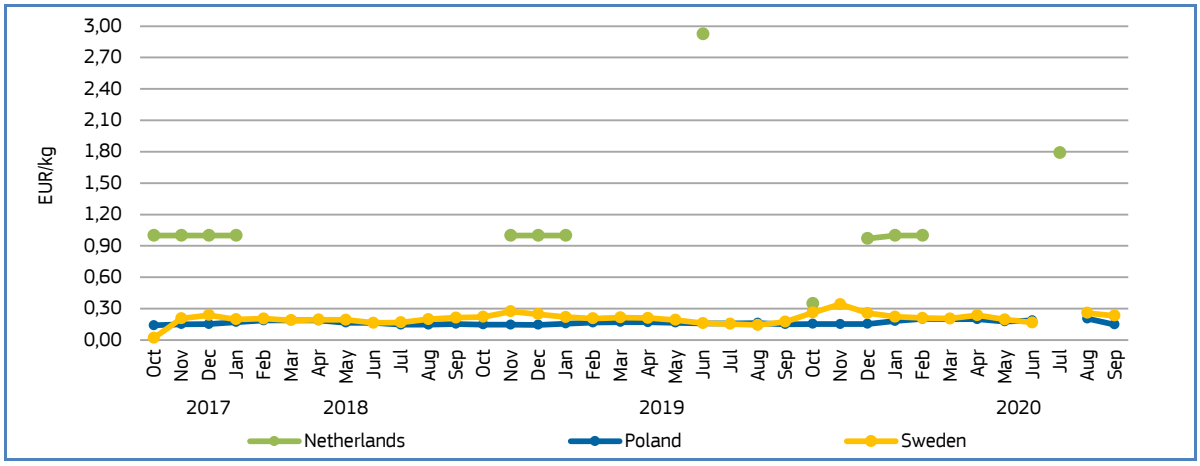
In **Sweden**, September-November see the highest first-sales volumes of European sprat. Sprat caught by the Swedish fishing fleet is mainly used for production of fishmeal and fish oil. Most Swedish landings of sprat from the Baltic are made by pelagic trawlers[21].

Figure 30. **FIRST SALES: COMPARISON OF SMALL PELAGICS (ERS LEVEL) IN SWEDEN IN VALUE AND VOLUME, SEPTEMBER 2020**



Price trend

Figure 31. **EUROPEAN SPRAT: FIRST-SALES PRICE IN SELECTED COUNTRIES, OCTOBER 2017–SEPTEMBER 2020**



Over the 36-month observation period (October 2017–September 2020), the average first-sales price of European sprat in the **Netherlands** was 1,16 EUR/kg, 598% higher than in **Poland** (0,17 EUR/kg) and 464% higher than in **Sweden** (0,20 EUR/kg). The reason behind such a high average first-sales price in the Netherlands is that the Netherlands showed a lower volume compared with two other surveyed countries.

In **Poland** in September 2020, the average first-sales price of European sprat (0,15 EUR/kg) decreased by 1% relative to September 2019 and by 4% relative to September 2018. Over the 36-month period, the average price varied from 0,14 EUR/kg for 2.604 tonnes in October 2017 to 0,20 EUR/kg for 2 tonnes in August 2020.

In **the Netherlands** in September 2020, there were no recorded first sales of European sprat. Over the observed 36-month period, the average price was at around 1,00 EUR/kg. The lowest average price was registered in October 2019 at 0,35 EUR/kg for 688 kg. It must be noted that there were a few fluctuations in average price trend, as the price spiked to its highest at 2,93 EUR/kg for 8 kg in June 2019 and 1,79 EUR/kg for 6 kg in July 2020. Such spikes were triggered by low volume.

[21] http://www.europarl.europa.eu/RegData/etudes/note/join/2011/460040/IPOL-PECH_NT(2011)460040_EN.pdf

In **Sweden**, in September 2020 the average first-sales price of European sprat was 0,23 EUR/kg, 33% higher than in September 2019, and 9% more than in the same month of 2018. The lowest price in the past 36 months was registered in October 2017, at 0,02 EUR/kg for 1.369 tonnes. The highest price (0,34 EUR/kg for 5.098 tonnes) was observed in November 2019.

2. Extra-EU imports

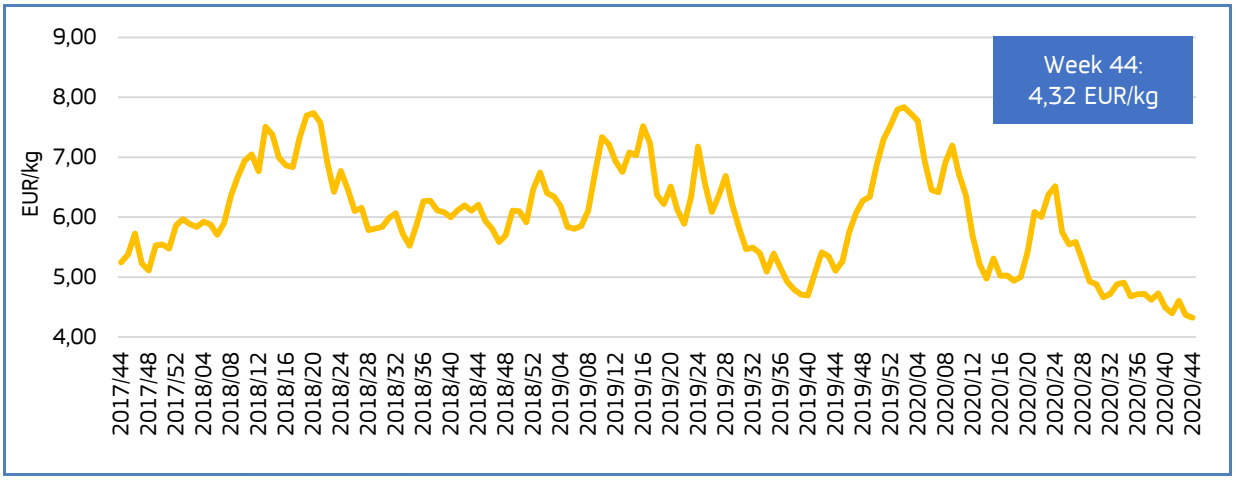
*Every month, the weekly extra-EU import prices (average values per week, in EUR per kg) are examined for nine different species. The three most relevant species in terms of value and volume remain consistent, and are examined every month: fresh whole Atlantic salmon from Norway, frozen Alaska pollock 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, which this month is small pelagics. The featured commodity species this month are: prepared or preserved sardines, in olive oil, from Morocco, frozen mackerel from the Faroe Islands, and frozen herring (other meat) from Norway. The remaining three species examined each month are randomly selected and, this month, include frozen fillets of redfish from Iceland, live, fresh, or chilled clams, cockles, and ark shells from Tunisia, and prepared or preserved crab from Vietnam.*

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

Extra-EU Imports		Week 44/2020	Preceding 4-week average	Week 44/2019	Notes
Fresh whole Atlantic salmon imported from Norway (*Salmo salar*, CN code 03021440)	**Price (EUR/kg)**	4,32	4,47 (–3%)	5,11 (–15%)	Lower prices in October 2020 than the same month in previous years. Downward trend in 2020 (most notably since June), due to a combination of increased export volume and reduced demand in the restaurant sector.
	Volume (tonnes)	15.579	17.323 (–10%)	14.417 (+8%)	Higher volumes in October 2020 than the same month in previous years. Upward trend from 2017 to 2020.
Frozen Alaska pollock fillets imported from China (*Theragra chalcogramma*, CN code 03047500)	**Price (EUR/kg)**	2,58	2,56 (+1%)	2,69 (–4%)	Upward trend in 2020, but consistent fall in price since week 26 of 2020.
	Volume (tonnes)	1.894	2.598 (–27%)	3.455 (–45%)	Fluctuations in supply. Lower volumes in October 2020 than the same month in previous years. Downward trend from 2017 to 2020.
Frozen tropical shrimp imported from Ecuador (genus *Penaeus*, CN code 03061792)	**Price (EUR/kg)**	4,74	4,69 (+1%)	5,91 (–20%)	Downward trend from 2017 to 2020. Average price in October 2020 substantially lower than October 2018 and 2019.
	Volume (tonnes)	2.293	3.334 (–31%)	2.278 (+1%)	Fluctuations in supply. Upward trend from 2017 to 2020. Volumes in October 2020 almost doubled compared with the same month in 2018 and 2019.

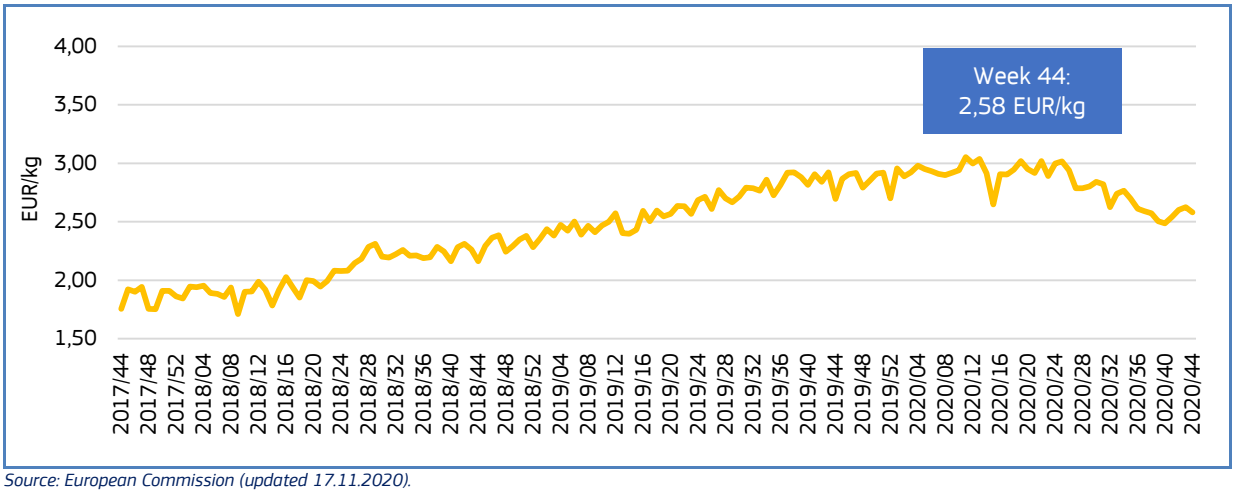
Source: European Commission (updated 17.11.2020).

Figure 32. **IMPORT PRICE OF FRESH WHOLE ATLANTIC SALMON FROM NORWAY**



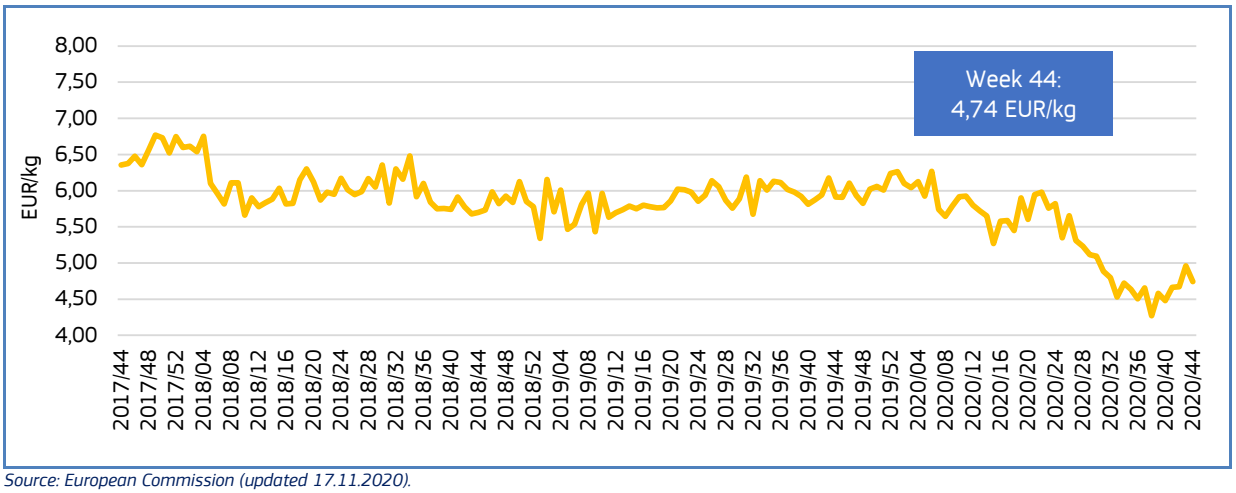
Source: European Commission (updated 17.11.2020).

Figure 33. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA**



Source: European Commission (updated 17.11.2020).

Figure 34. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR**



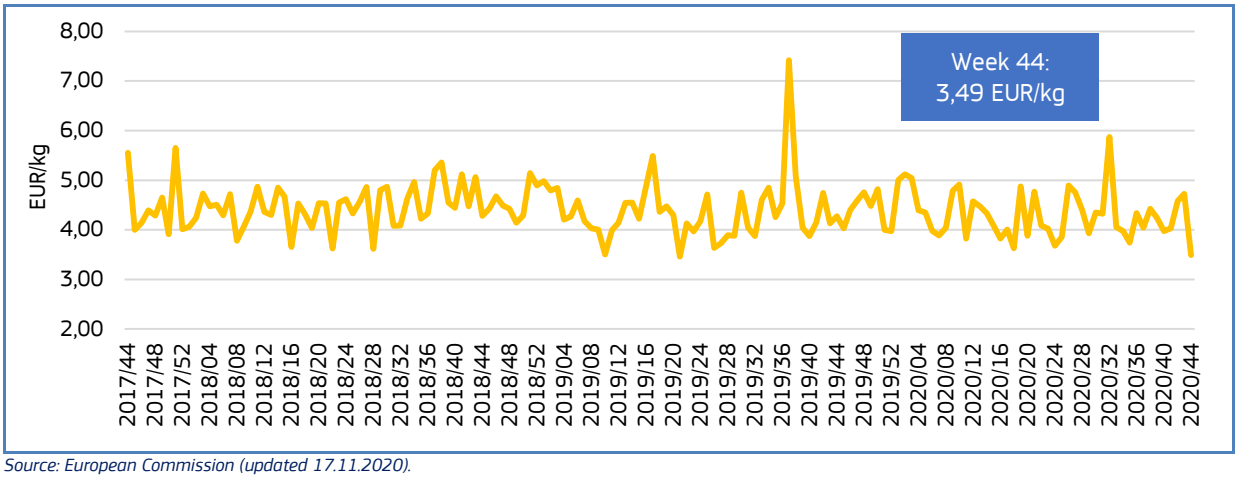
Source: European Commission (updated 17.11.2020).

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

Extra-EU Imports		Week 44/2020	Preceding 4-week average	Week 44/2019	Notes
Prepared or preserved sardines, in olive oil, from Morocco (CN code 16041311)	**Price (EUR/kg)**	3,49	4,33 (–19%)	4,28 (–18%)	Slight downward trend from 2017 to 2020. Price spike not correlated with decrease in supply.
	Volume (tonnes)	257	81 (+217%)	247 (+4%)	High fluctuations in supply, from 16 to 360 tonnes. Stable trend between 2017 and 2020.
Frozen mackerel from the Faroe Islands (*Scomber scombrus* or *Scomber japonicus*, CN code 03035410)	**Price (EUR/kg)**	1,64	1,66 (–1%)	1,61 (+2%)	Upward trend from 2017 to 2020. Price spikes due to significant drop of supply.
	Volume (tonnes)	289	489 (–41%)	459 (–37%)	High fluctuations in supply, from 0,06 to 2.407 tonnes. Downward trend from 2017to 2020.
Frozen herring (other meat) from Norway (*Clupea harengus, Clupea pallasii*, CN code 03049923)	**Price (EUR/kg)**	1,47	1,30 (+14%)	1,24 (+19%)	Upward trend from 2017to 2020.
	Volume (tonnes)	1.390	1.078 (+29%)	372 (+274%)	High fluctuations in supply, from 20 to 4.892 tonnes. Downward trend from 2017 to 2020.

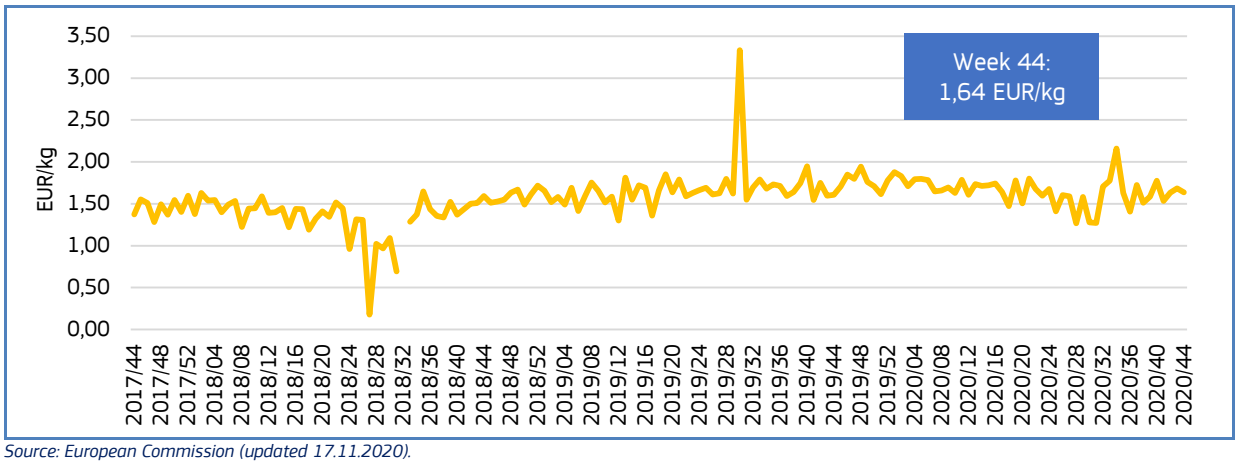
Source: European Commission (updated 17.11.2020).

Figure 35. **IMPORT PRICE OF PREPARED OR PRESERVED SARDINES, IN OLIVE OIL, FROM MOROCCO**



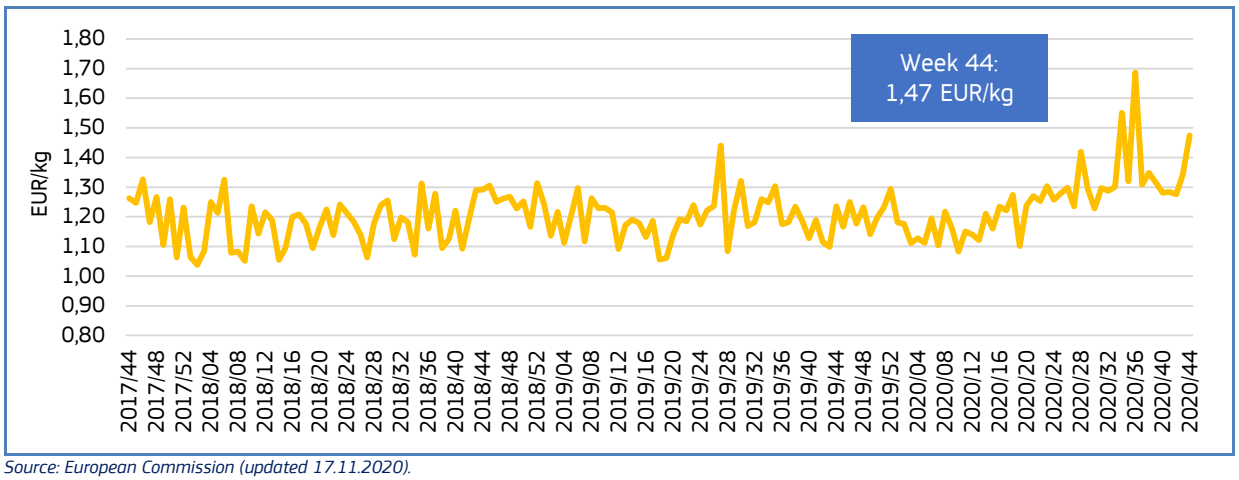
Source: European Commission (updated 17.11.2020).

Figure 36. **IMPORT PRICE OF FROZEN MACKEREL FROM THE FAROE ISLANDS**



Source: European Commission (updated 17.11.2020).

Figure 37. **IMPORT PRICE OF FROZEN HERRING (OTHER MEAT) FROM NORWAY**



Source: European Commission (updated 17.11.2020).

Since week 1 of 2020 the price of prepared or preserved sardines, in olive oil, from Morocco has declined slightly, while volume exhibited a stable trend.

The price of frozen mackerel from the Faroe Islands increased in 2020, while volume decreased slightly. Price ranged from 1,00 to 2,00 EUR/kg.

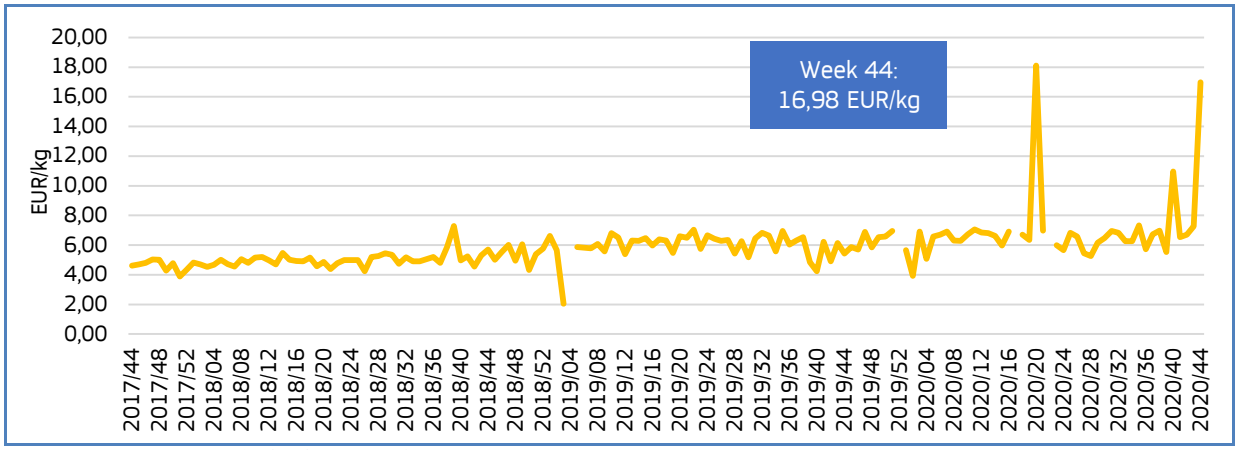
The price of frozen herring (other meat) from Norway fluctuated from 1,04 to 1,69 EUR/kg. In 2020, it exhibited an upward trend. At the same time, supply decreased.

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

Extra-EU Imports		Week 44/2020	Preceding 4-week average	Week 44/2019	Notes
Frozen fillets of redfish from Iceland (*Sebastes marinus*, CN code 03048921)	**Price (EUR/kg)**	16,98	7,86 (+116%)	5,43 (+212%)	Upward trend from 2017 to 2020. Price spike due to significant drop in supply.
	Volume (tonnes)	0,04	21 (–100%)	43 (–100%)	High fluctuations in supply, from 0,04 to 163 tonnes. Downward trend from 2017 to 2020.
Live, fresh, or chilled clams, cockles, and ark shells from Tunisia (CN code 03077100)	**Price (EUR/kg)**	*6,00	n/a	**12,95 (–54%)	Sporadic data (e.g. data is available for 22 weeks in 2019, and 13 weeks in 2020); weekly fluctuations.
	Volume (tonnes)	*2,3	n/a	1,7 (+39%)	Sporadic data (e.g. data is available for 22 weeks in 2019, and 13 weeks in 2020); high fluctuations in supply.
Prepared or preserved crab from Vietnam (CN code 16051000)	**Price (EUR/kg)**	6,12	***9,45 (–35%)	10,52 (–42%)	Slight downward trend in 2017-2020.
	Volume (tonnes)	25	***38 (–35%)	35 (–30%)	Slight upward trend in 2017-2020.

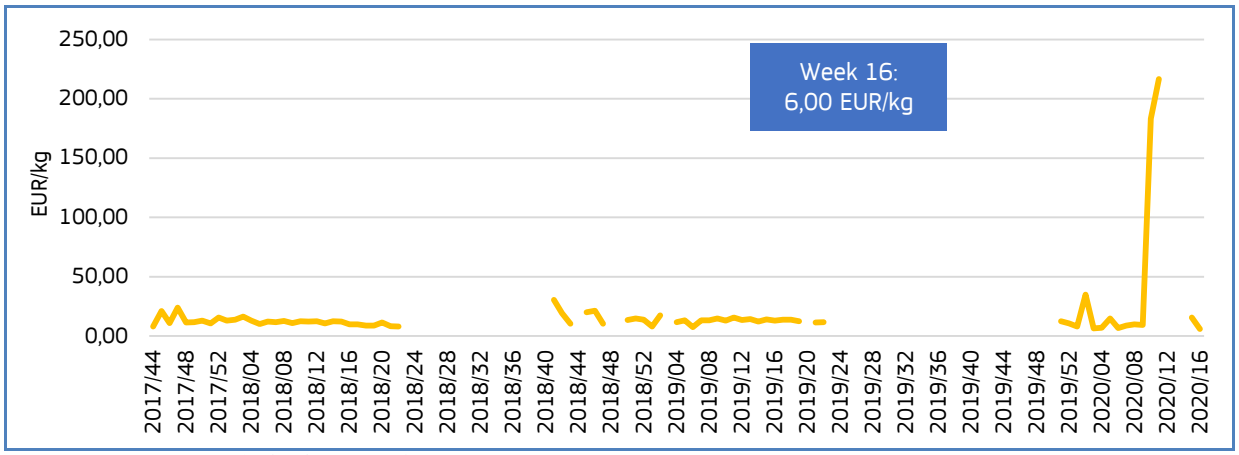
Source: European Commission (updated 17.11.2020).
**Data refers to week 16 of 2020 (the most recent available); ** week 16/2019; ***average of week 40 and 43.*

Figure 38. **IMPORT PRICE OF FROZEN FILLETS OF REDFISH FROM ICELAND**



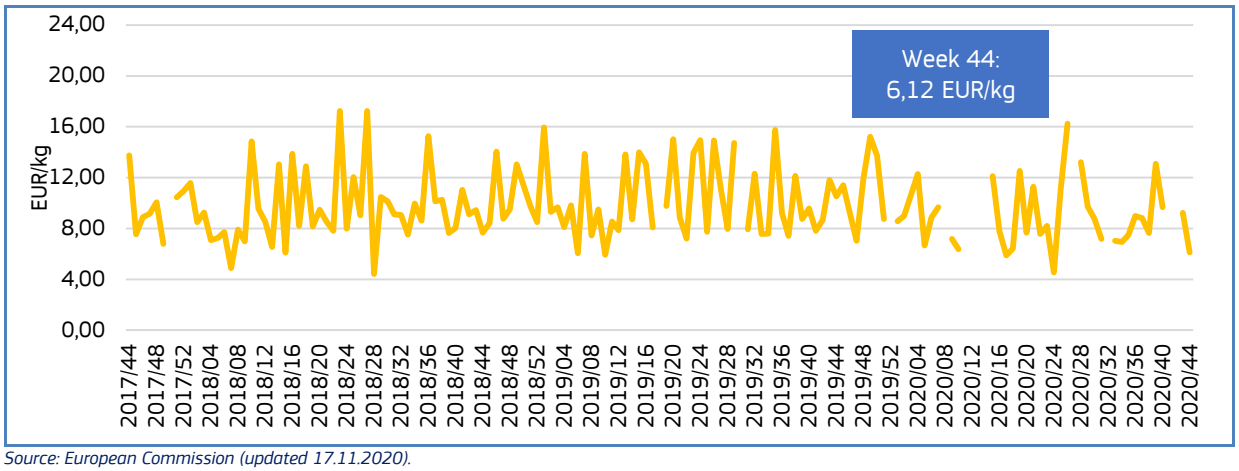
Source: European Commission (updated 17.11.2020).

Figure 39. **IMPORT PRICE OF LIVE, FRESH, OR CHILLED CLAMS, COCKLES, AND ARK SHELLS FROM TUNISIA**



Source: European Commission (updated 17.11.2020).

Figure 40. **IMPORT PRICE OF PREPARED OR PRESERVED CRAB FROM VIETNAM**



Source: European Commission (updated 17.11.2020).

Since the beginning of 2020, the price of frozen fillets of redfish from Iceland has increased, while volume has decreased.

Price and volume for clams, cockles, and ark shells imported from Tunisia are scarce and exhibit high weekly fluctuations, from 5,87 to 216,67 EUR/kg; and 0,0003 to 11 tonnes, respectively. Price does not correlate with volume.

The price of prepared or preserved crab from Vietnam fluctuated from 4,41 to 17,25 EUR/kg. In 2020, it exhibited a slight downward trend. At the same time, supply remained stable.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In September 2020 relative to September 2019, household consumption of fresh fisheries and aquaculture products increased in both volume and value in all Member States analysed, except Ireland. In the latter, both volume and value experienced a decline.

The drop seen in Ireland was mainly due to reduced consumption of salmon and mackerel (-13% and -12%, respectively).

The consumption increase registered in Germany was due mainly to a rise in consumption of herring and cod (+118% and +24%, respectively). Herring was also the primary driver of increased consumption in Sweden, together with salmon (+31% and 74%).

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

Country	Per capita consumption 2018* (live weight equivalent, LWE) kg/capita/year	September 2018		September 2019		August 2020		September 2020		Change from September 2019 to September 2020	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	39,83	983	15,07	1.012	15,61	1.137	18,51	1.218	18,84	20%	21%
France	33,52	17.755	187,48	16.773	184,73	15.067	168,66	18.012	202,41	7%	10%
Germany	14,50	3.964	55,72	4.108	57,63	4.307	67,63	5.120	75,10	25%	30%
Hungary	6,12	242	1,28	328	1,72	312	1,58	332	2,04	1%	19%
Ireland	23,13	1.185	17,10	1.104	16,70	998	14,60	1.049	15,28	5%	9%
Italy	31,02	30.615	305,64	30.052	301,50	23.371	234,99	30.223	310,76	1%	3%
Netherlands	20,90	3.757	49,52	3.665	52,25	3.043	45,18	4.242	60,76	16%	16%
Poland	13,02	3.510	21,22	3.071	19,78	2.678	19,08	3.118	21,36	2%	8%
Portugal	60,92	4.197	27,89	5.921	38,74	5.621	36,91	6.744	42,69	14%	10%
Spain	46,01	47.469	357,06	46.973	368,98	45.828	364,34	53.285	417,49	13%	13%
Sweden	26,61	620	8,25	764	9,88	1.211	15,76	1.165	13,30	52%	35%

Source: EUMOFA, based on Europanel (updated 15.11.2020).
**Data on per capita consumption of all fish and seafood products for all EU Member States can be found at:*
https://www.eumofa.eu/documents/20178/415635/EN_The+EU+fish+market_2020.pdf/

Over the past three years, the September average household consumption of fresh fisheries and aquaculture products has been below the annual average in both volume and value terms in France, Hungary, Poland, and Spain. In Denmark and Germany, the September average in value was also lower than the yearly average household consumption. In the rest of the Member States analysed, the September household consumption in value was above the annual average.

The most recent weekly consumption data (up to week 50 of 2020) are available on the EUMOFA website and can be accessed **here**.

3.2. Fresh scabbardfish

Habitat: A benthopelagic species living on sandy and muddy bottoms[22].
Catch area: The coastal areas of mainly Portugal, but also along the coast of northern Spain and France, and west and north of the British Isles[23].
Catching countries in the EU: Portugal, France, Spain, and Italy.
Production method: Caught. Traditionally caught by line gears in Portuguese waters and by trawlers in France.
Main consumers in the EU: Portugal, France.
Presentation: Mostly fillets.
Preservation: Fresh, frozen.
Means of preparation: Grilled, steamed, fried.

3.2.1. Overview of household consumption in Portugal

Portugal is among the EU Member States with the highest per capita apparent consumption[24] of fisheries and aquaculture products. In 2018, the country's per capita apparent consumption increased slightly by 1% and reached 60,92 kg. This was more than twice the EU average (24,36 kg). However, Portuguese apparent consumption was 29% less than that of Malta[25], the Member State with the highest per capita apparent consumption (85,95 kg).

See more on per capita apparent consumption in the EU in Table 22.

Since 2017, Portuguese consumers spent on average EUR 7,84 for a kilogram of fresh scabbardfish. The average consumed volumes purchased by households were 145 tonnes per month.

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

First Sales: Portugal 11/2016.

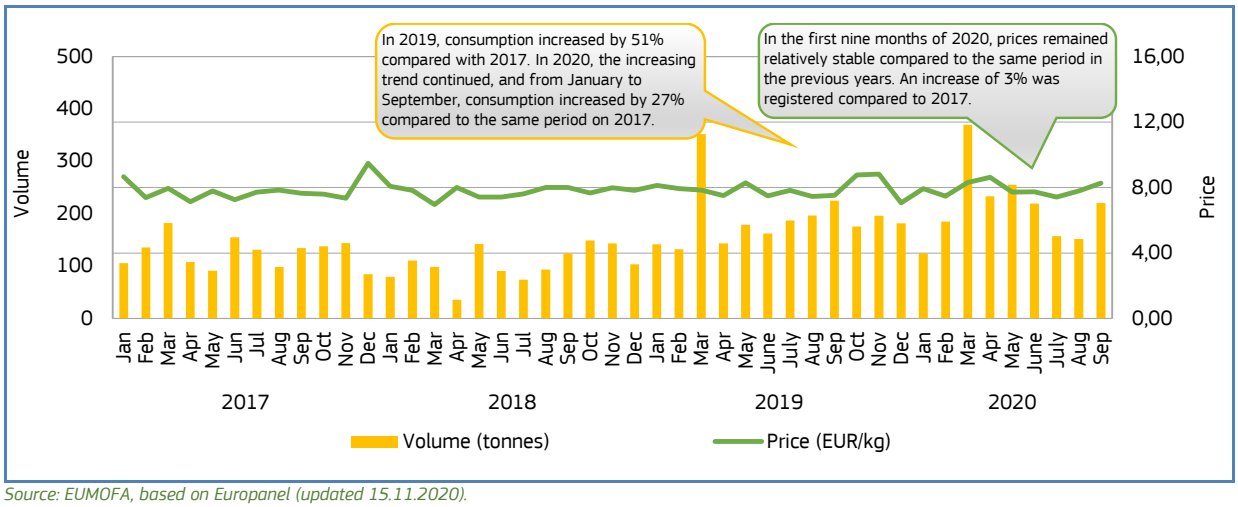
Consumption: Portugal 2/2017.

[22] https://www.eumofa.eu/documents/20178/96604/Monthly+Highlights+-+No.+2-2017.pdf
[23] Ibidem.
[24] "Apparent consumption" is calculated by using the supply balance sheet that provides an estimate of the supply of fisheries and aquaculture products available for human consumption at EU level. The calculation of the supply balance sheet is based on the equation: *Apparent consumption = [(total catches – industrial catches) + aquaculture + imports] – exports.* Catches targeted for fishmeal (industrial catches) are excluded. Non-food use products are also excluded from imports and exports. It is worth underlining that the methodologies for estimating apparent consumption at EU and Member State levels are different, the first based on data and estimates as described in the Methodological background, the latter also requiring the adjustment of abnormal trends due to the higher impact of stock changes.
[25] The high per capita apparent consumption in Malta could be due to higher consumption of fisheries and aquaculture products during the tourist season.

3.2.2. Household consumption trends in Portugal

Long-term trend (January 2017 to September 2020): Upward trend in both price and volume.
Yearly average price: 7,82 EUR/kg (2017), 7,74 EUR/kg (2018), 7,89 EUR/kg (2019).
Yearly consumption: 1.509 tonnes (2017), 1.245 tonnes (2018), 2.273 tonnes (2019).
Short-term trend (January 2020 to September 2020): Seasonal decrease in volume and relatively stable in value.
Average price: 7,92 EUR/kg.
Average consumption: 1.917 tonnes.

Figure 41. **RETAIL PRICE AND VOLUME OF FRESH SCABBARDFISH PURCHASED BY HOUSEHOLDS IN PORTUGAL**



Source: EUMOFA, based on Europanel (updated 15.11.2020).

4. Case study – Fisheries and aquaculture in Brazil

4.1 Introduction

Brazil, officially the Federative Republic of Brazil, is the largest country in South America, with a land area of 8.515.770 square kilometres[26]. It has a coastline of 7.491 kilometres[27] in length, which borders the Atlantic Ocean from the north east to the south east[28] of the country. The capital of Brazil is Brasília, while São Paulo is the most populous city. The total population stands at around 211.049.527[29].

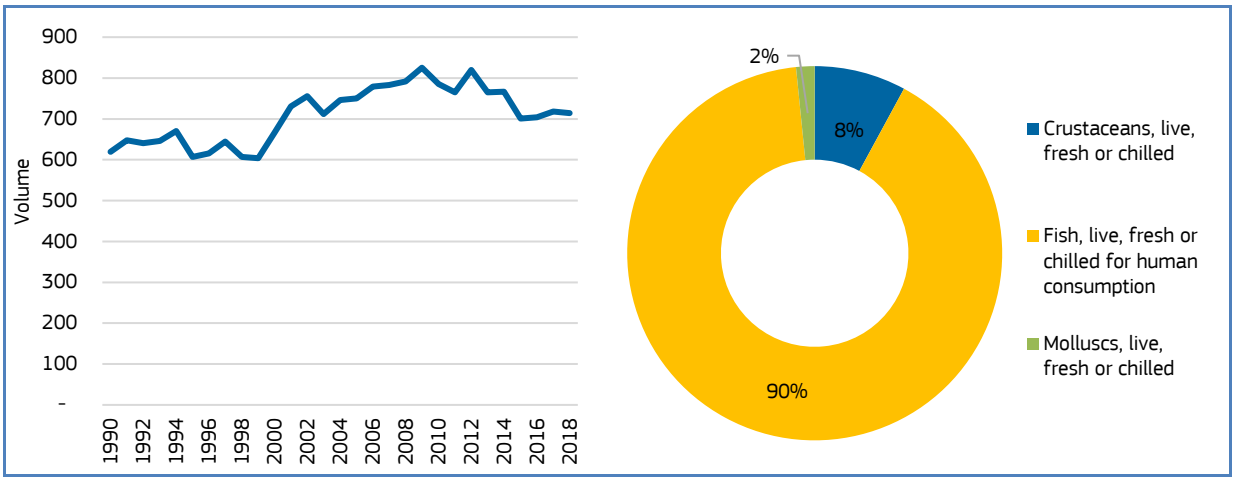
Brazil's fisheries and aquaculture sector directly or indirectly provides employment for an estimated 3,5 million people[30]. Artisanal fisheries represent more than 60% of total fish landings and account for 90% of employment in the catch sector[31].

More than 30% of fisheries production comes from inland freshwater fisheries, whilst marine production accounts for the remaining 70%. Marine catch is highly diverse in terms of species, ranging from tropical fish species found in the north to colder fish species in the south. Brazilian marine fish resources are currently heavily exploited, but there is huge potential for development of the aquaculture sector[32]. At present, Brazil is the second largest aquaculture producer in the Latin American and Caribbean region after Chile. It also is the largest importer of fish in the Latin American region[33].

4.2. Fisheries

In 2018, the FAO reported wild catches of 714.290 tonnes for Brazil, consisting of 151 species of fish, 11 species of crustaceans and 6 species of molluscs.

Figure 42. **TOTAL CATCHES OF THE BRAZILIAN FLEET (LEFT, volume in 1.000 tonnes) AND CATCHES IN 2018 BY FAO COMMODITY GROUP (RIGHT)**



Source: FAO.

[26] https://data.worldbank.org/indicator/AG.SRF.TOTL.K2?locations=BR
[27] https://www.cia.gov/library/publications/the-world-factbook/geos/br.html
[28] https://www.lonelyplanet.com/maps/south-america/brazil/
[29] https://data.worldbank.org/indicator/SP.POP.TOTL?locations=BR
[30] https://seafood-tip.com/sourcing-intelligence/countries/brazil/
[31] http://www.fao.org/fishery/facp/BRA/en
[32] See more in the "Aquaculture" section below.
[33] http://www.fao.org/fishery/facp/BRA/en

According to the latest estimates (2017), there are 1.083.778 full-time fishers in Brazil[34]. The fishing fleet is estimated to contain 108.346 vessels, 30% without a motor and mostly under 12 metres in length. More than 60% of total marine landings can be traced to the artisanal fleet, which consists of roughly 60.000 vessels mainly operating in the northern regions. Industrial vessels operate mainly in the south.

Brazilian sardinella and whitemouth croaker are the main species caught by the Brazilian fleet, although together they accounted for only 13% of total catches in 2018. Catches of Brazilian sardinella reached a peak in 2013, when they alone covered 13% of total catches, while in 2018 the species' share dropped to 6%.

Brazil has a strategic proximity to the migratory routes of the main stocks of tuna in the South Atlantic Ocean[35] and was one of the founding members of the International Commission for the Conservation of Atlantic Tunas (ICCAT). Of the tuna caught, skipjack tuna covers by far the largest share, although in 2014 its catches dropped to 25.000 tonnes from the peak of 33.000 tonnes achieved the previous year. Conversely, yellowfin tuna catches registered a noteworthy growth from 2016 to 2017, increasing from 2.500 tonnes to 18.000 tonnes. Still, in 2018 total catches of tuna species represented only 6,3% of the total, with an increase of only 0,8% since 1990.

Table 23. **MAIN SPECIES IN BRAZIL'S FISHERIES (volume in 1.000 tonnes)**

Species	2010	2011	2012	2013	2014	2015	2016	2017	2018
Brazilian sardinella	62	75	96	98	52	46	46	46	46
Whitemouth croaker	43	40	44	38	46	41	42	40	40
Sea catfishes nei	31	29	32	27	33	30	30	30	30
Marine fishes nei	41	38	43	35	33	29	29	29	29
Prochilods nei	28	27	27	27	27	26	26	26	26
Laulao catfish	25	23	23	24	23	22	22	22	22
Acoupa weakfish	21	19	21	18	22	20	20	21	21
Skipjack tuna	21	31	31	33	25	18	18	20	20
Other	513	483	504	465	507	469	471	484	481
Total*	**785**	**765**	**820**	**765**	**767**	**701**	**704**	**718**	**714**

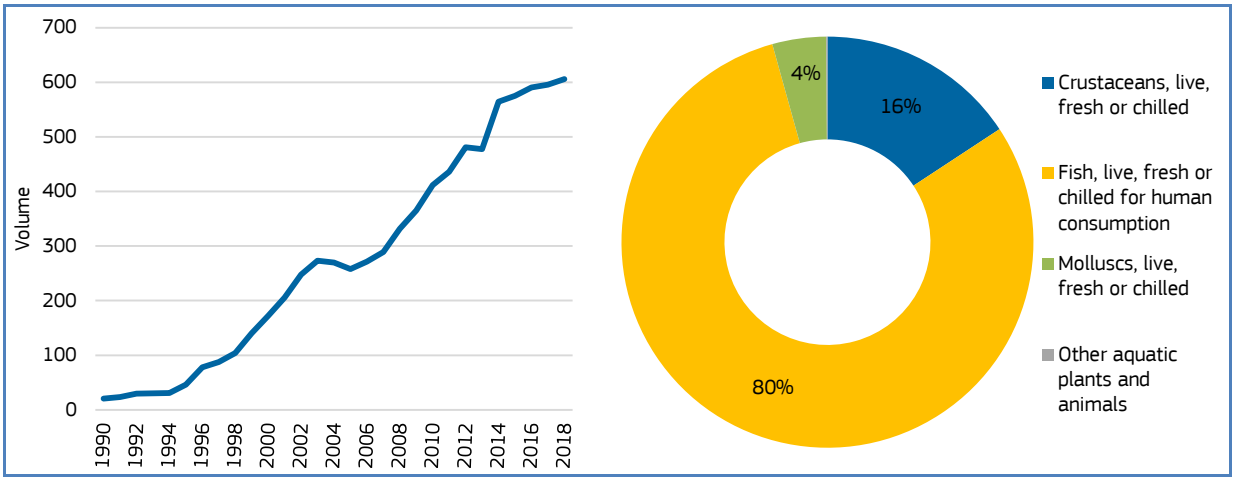
** The total is the rounded sum of actual values.*
Source: FAO.

4.3. Aquaculture

Brazil's history of aquaculture began in the early twentieth century, with a total production of 30.000 tonnes at the beginning of the 1990s[36]. Although shrimp farming can be traced to the 1980s, the introduction of *Penaeus vannamei* in 1995 led to a rapid growth in the industry[37]. The aquaculture production of shrimps generates around 3,5 jobs per hectare, higher than irrigated fruit culture, providing unskilled workers with employment[38]. It is estimated that 50.000 people are currently employed on shrimp farms[39]. About 90% of Brazil's mussel production is conducted by artisanal fishermen who began their production as a side endeavour until its profitability exceeded that of fishing. However, there is no official information reporting the number of people working in mussel aquaculture[40]. Since 2010, there has been a 47% increase in terms of farmed volume.

[34] http://www.fao.org/fishery/facp/BRA/en
[35] https://www.scielo.br/scielo.php?script=sci_arttext&pid=S0034-73292019000200201#:~:text=ICCAT%20is%20responsible%20for%20the,in%20the%20past%20ten%20years.
[36] http://www.fao.org/fishery/countrysector/naso_brazil/en
[37] Ibidem.
[38] http://www.fao.org/fishery/facp/BRA/en
[39] Ibidem.
[40] Ibidem.

Figure 43. **AQUACULTURE PRODUCTION IN BRAZIL (LEFT, volume in 1.000 tonnes) AND AQUACULTURE PRODUCTION IN 2018 BY FAO COMMODITY GROUP (RIGHT)**



Source: FAO.

In 2018, Nile tilapia production was 104% higher than in 2010, and accounted for 52,3% of total aquaculture production in terms of volume. The three main freshwater species farmed (Nile tilapia, cachama and tambacu (hybrid)) covered 75% of total production. In terms of value, Nile tilapia accounted for 36% of the total, while whiteleg shrimp, the second-most valuable farmed species, contributed to 30% of the total value. It is worth noting that Brazil is the fourth largest producer of tilapia in the world[41].

Table 24. **MAIN SPECIES IN BRAZIL'S AQUACULTURE PRODUCTION (volumes in tonnes, values in 1.000 EUR)**

Species	2013		2014		2015		2016		2017		2018	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Nile tilapia*	169	356	200	408	219	356	241	387	290	509	317	486
Cachama	89	222	140	320	136	261	137	251	105	227	103	197
Whiteleg shrimp	65	355	65	337	70	271	60	291	60	408	62	407
Tambacu, hybrid	47	106	32	85	30	64	37	77	36	75	35	64
Cyprinids nei	19	47	21	51	21	40	20	40	19	41	18	38
Freshwater siluroids nei	16	59	20	79	18	59	16	48	16	50	14	40
Other	73	178	86	250	81	169	80	157	70	151	57	114
Total**	**478**	**1.322**	**564**	**1.530**	**575**	**1.220**	**591**	**1.251**	**596**	**1.461**	**606**	**1.346**

Source: FAO.
**Classified as "Tilapia nei" until 2016.*
*** The total is the rounded sum of actual values.*

4.4. Trade

Total export from Brazil

Fishmeal dominates Brazil's fisheries and aquaculture product (FAP) exports: in 2019 it represented 27% of total FAP export volume and it is the principal contributor to the 83% total increase in FAP exports recorded since 2015. On the other hand, skipjack tuna exports, which is the second most exported species (5% of total exports) dropped by 51% in 2019 compared with 2015. About 73% of tuna is exported as frozen, with skipjack and yellowfin tuna being the main tuna species sent abroad. 92% of swordfish is exported as live/fresh, and the rest as frozen.

[41] https://www.peixebr.com.br/anuario-2020/

Table 25. **EXPORT FROM BRAZIL BY MAIN COMMERCIAL SPECIES[42] (volume in 1.000 tonnes, value in million EUR)**

Main Commercial Species	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Fishmeal	3	2	9	6	8	5	12	10	19	16
Tuna, skipjack	7	12	6	9	6	11	4	6	3	4
Rock lobster and sea crawfish	2	59	2	54	3	64	2	61	3	83
Tuna, yellowfin	0	2	1	3	2	5	2	7	3	8
Swordfish	1	5	1	7	1	7	2	8	2	8
Tuna, bigeye	1	4	1	5	1	5	1	7	1	7
Fish oil	0	0	0	0	1	1	2	2	1	1
Ray	1	4	1	3	1	2	1	3	1	4
Other	23	112	28	132	29	123	30	133	37	164
Total*	**39**	**200**	**50**	**221**	**51**	**223**	**57**	**237**	**71**	**295**

Source: EUMOFA elaboration of IHS Markit data (Global Trade Atlas).
** The total is the rounded sum of actual values.*

Since 2000, the USA has been the main destination country for Brazil's FAP exports, although export volume has decreased by 11,4 % over the past 20 years. Spain and Argentina used to be the main export destinations (18.7% and 9% of total exports in 2000, respectively), but from 2000 to 2019 exports to these two countries reduced by 98,2% and 71,2% (in terms of volume), respectively. The large reduction in exports to Spain from 2017 onwards is explained by the EU ban on imports of seafood from Brazil destined for human consumption (see section on EU imports from Brazil below). Today, China and Ecuador are the second and third most significant export destinations, destinations in terms of volume, covering 14,1% and 5,1% of Brazil's total FAP exports. In terms of value, the USA covers 48% of Brazil's FAP exports, while China and Taiwan cover 12% and 5% respectively. Data collected so far for 2020 show that this trend is set to continue.

Table 26. **EXPORTS FROM BRAZIL BY DESTINATION COUNTRY (volume in 1.000 tonnes, value in million EUR)**

Trade Partner	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
United States	10	92	13	90	13	95	18	121	21	142
China	2	8	2	8	2	9	5	21	10	36
Ecuador	0	0	0	0	0	0	4	6	4	5
Taiwan	0	5	1	8	3	11	5	16	3	15
Chile	0	0	2	1	2	2	5	6	3	6
Bangladesh	2	1	5	3	2	2	1	1	3	3
Other	25	94	27	110	30	105	20	67	26	89
Total*	**39**	**200**	**50**	**221**	**51**	**223**	**57**	**237**	**71**	**295**

Source: EUMOFA elaboration of IHS Markit data (Global Trade Atlas).
** The total is the rounded sum of actual values.*

[42] EUMOFA aggregation for species (Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies).

Total imports in Brazil

Brazil is the main importing country of fisheries and aquaculture products in the Latin American region. In 2018, 28,3% of all imported seafood was salmon, mostly from Chile. Miscellaneous small pelagics, principally sardines[43], account for 23% of import volume, but only 5% of value. In terms of value, salmon covers 46% of total imports, while cod accounts for 10%. Most imported seafood is frozen, although salmon is mostly imported as fresh or live, and cod is predominantly imported as salted.

Table 27. **IMPORTS IN BRAZIL BY MAIN COMMERCIAL SPECIES (volume in 1.000 tonnes)**

Main Commercial Species	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Salmon	97	445	83	490	85	538	87	488	97	534
Miscellaneous small pelagics	19	14	73	53	93	66	90	70	77	63
Hake	26	72	25	62	35	91	31	79	33	92
Freshwater catfish	31	51	34	47	43	85	28	71	22	57
Cod	20	130	17	106	18	123	15	114	13	117
Alaska pollock	35	68	20	35	20	43	16	36	10	29
Other	115	320	111	288	117	315	101	302	90	272
Total*	**341**	**1.099**	**364**	**1.080**	**411**	**1.260**	**367**	**1.161**	**343**	**1.164**

Source: EUMOFA elaboration of IHS Markit data (Global Trade Atlas)
** The total is the rounded sum of actual values.*

EU imports from Brazil

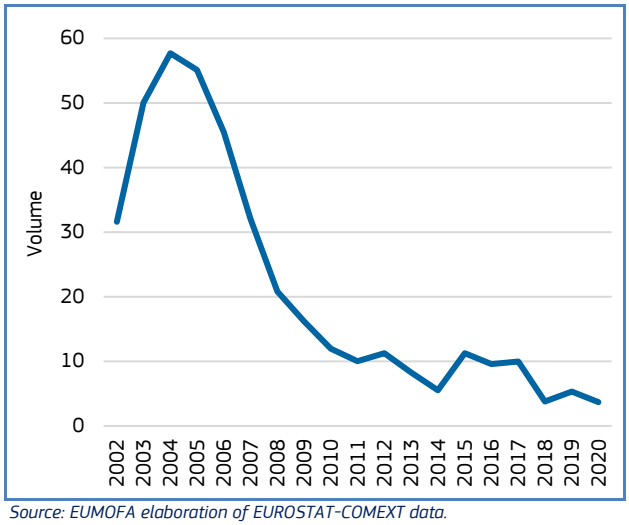
Today, the European Union has a ban on imports of fishery products intended for human consumption from Brazil. This decision began as a self-imposed temporary ban by Brazil from the 3rd of January 2018 on exports of seafood to the EU, following a lack of clarity regarding sanitary inspection checks on factory vessels and the landing of raw material into ports and processing plants. There was also uncertainty concerning the failure to distinguish between wild caught and farmed fish[44]. As the issues were not satisfactorily resolved, the EU imposed the import ban on 11th of July 2018[45]. There is currently no official end date for this restriction.

[43] Norwegian Seafood Council, 2019, The Brazilian Bacalhau Consumer.
[44] Ibidem.
[45] https://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1531832169197&uri=CELEX:32018R0981

EU FAP imports from Brazil have historically been relatively low. EU imports from Brazil are now principally other non-food use products, primarily seaweeds and other algae[46], which in 2019 accounted for 67%, of import volume, but only 10%, of value. Other products (extracts and juices of meat, fish, crustaceans, molluscs and other aquatic invertebrates) [47] accounted for 87% of value. This is the result of the ban on imports of products for human consumption as mentioned above.

In 2018, skipjack tuna was the main species imported by the EU from Brazil destined for human consumption, but this was only for the first few months in 2018 and by 2019 the EU was not importing any tuna from Brazil. This suggests some delay between the establishment of the EU import ban and its implementation. Looking away from the recent import ban, this followed a downward trend of EU imports from Brazil since a peak in 2004, when a total of 57.700 tonnes of FAP was recorded.

Figure 44. **EU IMPORTS OF SEAFOOD FROM BRAZIL (volume in 1.000 tonnes)**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

Table 28. **EU FAP IMPORTS FROM BRAZIL (volume in tonnes, value in 1.000 EUR)**

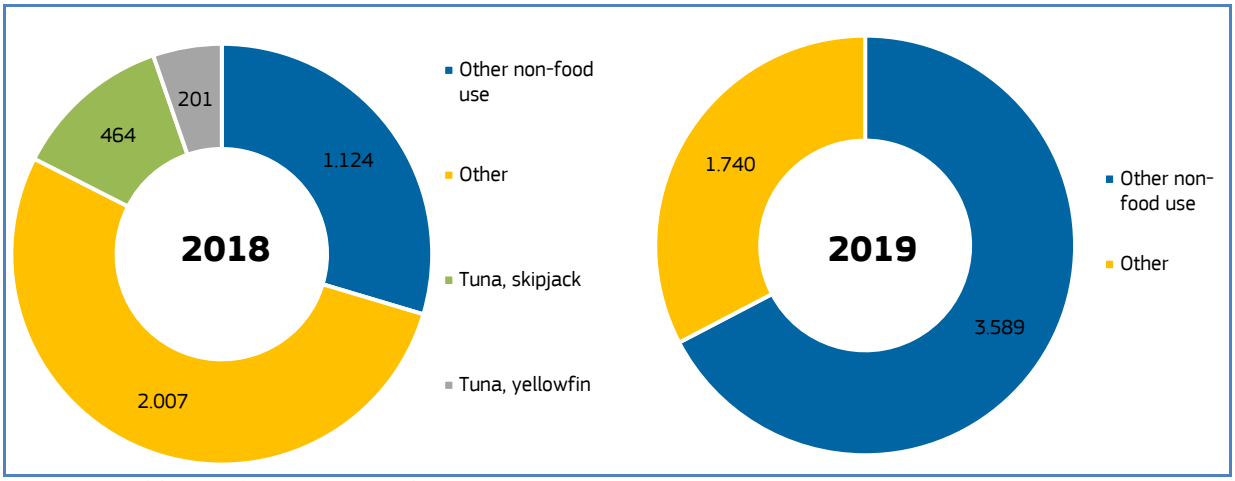
	2015		2016		2017		2018		2019	
Main Commercial Species	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Other products	1.828	22.677	1.663	20.326	1.597	19.761	1.568	20.308	1.643	22.689
Other non-food use	497	1.782	819	2.013	1.566	2.669	1.124	1.973	3.589	2.635
Tuna, skipjack	6.711	12.871	3.234	5.107	3.830	7.083	464	927	0	0
Tuna, yellowfin	232	486	201	522	710	1.672	201	498	0	0
Monk	468	2.789	914	5.265	604	3.605	96	550	0	0
Swordfish	257	1.906	265	1.762	282	1.919	40	245	0	0
Other	1.247	10.644	2.458	19.272	1.384	10.289	303	1.662	97	638
Total	**11.240**	**53.155**	**9.554**	**54.267**	**9.972**	**46.999**	**3.795**	**26.163**	**5.329**	**25.962**

Source: EUMOFA elaboration of EUROSTAT-COMEXT data.
** The total is the rounded sum of actual values.*

As shown in Table 28, EU imports of main commercial species originating from Brazil plummeted in 2018-2019 compared with previous years. However, despite the ban on exports of seafood products for human consumption to the EU, the total import volume is slightly higher in 2019 than in 2018. This can be attributed to a 127% growth in EU imports of products classified as "other non-food use", mainly seaweeds and other algae[48].

[46] Product number 12122900.
[47] Product number 16030080.
[48] Product number 12122900.

Figure 45. **EU FAP IMPORTS FROM BRAZIL IN 2018 (LEFT) AND 2019 (RIGHT) BY MAIN COMMERCIAL SPECIES (volume in tonnes)**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

The EU predominantly imports FAP as prepared or preserved, frozen and unspecified.

Table 29. **IMPORTS BY PRESERVATION STATE (volume in tonnes, value in 1.000 EUR)**

	2015		2016		2017		2018		2019	
Preservation	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Prepared/Preserved	1.829	22.683	1.663	20.327	1.570	19.694	1.569	20.310	1.664	22.775
Frozen	8.694	27.166	6.826	30.102	6.440	22.674	1.098	3.827	73	494
Unspecified	466	354	787	619	1.756	1.772	1.093	567	3.553	1.013
Live/Fresh	250	2.952	279	3.219	207	2.859	35	1.459	40	1.679
Total*	**11.240**	**53.155**	**9.554**	**54.267**	**9.972**	**46.999**	**3.795**	**26.163**	**5.329**	**25.962**

Source: EUMOFA elaboration of EUROSTAT-COMEXT data.
** The total is the rounded sum of actual values.*

EU export to Brazil

Brazil is part of the EU-Mercosur trade agreement, alongside Argentina, Paraguay, and Uruguay. The EU is Mercosur's second largest trade partner in goods after China, and Mercosur is the 11th largest trade partner in goods for the EU[49]. The Mercosur and EU trade agreement was announced on the 28th of June 2019, but details are still being negotiated. Currently, fisheries exports from Mercosur members face tariffs ranging from 8%-15%, but these are set to gradually be reduced to zero over a seven-year period[50].

The main species exported from the EU to Brazil is cod, which in 2019 covered 42% of total exports in volume and 71% of total exports in value. Cod is mainly exported as frozen or dried (61% and 30%), while sardines are mostly exported as frozen (97%).

[49] https://ec.europa.eu/trade/policy/countries-and-regions/regions/mercosur/
[50] https://en.mercopress.com/2019/07/03/hake-squid-and-scallops-will-access-eu-free-of-tariffs-as-soon-as-deal-with-mercosur-becomes-effective

Table 30. **EU EXPORTS TO BRAZIL (volume in tonnes, value in 1.000 EUR)**

Main Commercial Species	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Cod	6.655	49.678	6.727	47.137	7.901	59.589	6.660	54.614	6.898	61.054
Sardine	193	616	3.105	2.186	4.549	3.432	108	351	1.910	1.509
Saithe (Coalfish)	300	1.484	102	423	440	2.187	423	1.845	598	2.595
Fishmeal	0	2	40	59	12	34	181	308	291	494
Octopus	221	1.646	138	911	470	3.909	362	3.483	228	2.111
Alaska pollock	1	4	1	4	117	430	249	925	191	783
Other	6.223	14.086	6.967	15.826	8.127	18.179	8.333	22.775	6.214	17.626
Total*	**13.594**	**67.518**	**17.080**	**66.545**	**21.616**	**87.762**	**16.316**	**84.302**	**16.329**	**86.170**

Source: EUMOFA elaboration of EUROSTAT-COMEXT data.
** The total is the rounded sum of actual values.*

4.5. Consumption

Yearly per capita consumption of seafood in Brazil was around 10,5 kg in 2018, much lower than the world average of 20,2 kg[51]. Although Brazilians value seafood's health benefits and good taste, it is still a relatively expensive source of protein[52] and the percentage of household income spent on fresh fish is low compared to other sources of protein[53]. Consumption of fish also varies depending on the region. Southern parts of Brazil are major meat production regions and have a strong meat culture[54]. In these areas, fewer individuals see fish as "extremely important" compared to other areas[55]. It is estimated that per capita consumption of fish is three times higher in the Amazon basin compared to larger cities[56]. An estimated 1/3 of current seafood consumption is of farmed fish from Brazil, while the rest is imported or saltwater catch[57].

Consumption of fish has been steadily increasing over recent years due to intensive promotion campaigns. Sardines and tilapia are reported to be the most regularly consumed fish, followed by prawn/shrimp and salmon[58]. The last five years have seen an increase in seafood consumption of 4,1% per capita[59]. Although the growth rate of seafood consumption is positive each year, growth was at its lowest in 2015 and 2016, during the worst years of Brazil's economic crisis[60].

[51] Ibidem.
[52] Ibidem.
[53] https://www.ibge.gov.br/en/statistics/social/health/25610-pof-2017-2018-pof-en.html?=&t=resultados
[54] Norwegian Seafood Council, 2019, The Brazilian Bacalhau Consumer.
[55] Ibidem.
[56] https://seafood-tip.com/sourcing-intelligence/countries/brazil/#:~:text=In%20coastal%20areas%20and%20in,at%20about%2012kg%20in%202014.
[57] https://www.peixebr.com.br/anuario-2020/ page 112.
[58] Norwegian Seafood Council, 2019, The Brazilian Bacalhau Consumer.
[59] Ibidem.
[60] Ibidem.

5. Case study – Megrim in the EU

Megrim (*Lepidorhombus whiffiagonis*) is a species of flatfish caught by the EU fleet, mostly by French, Spanish, and Irish trawlers as well as by the fleet of the United Kingdom, in the Celtic Sea and Bay of Biscay. In 2018, megrim landings reached 16.103 tonnes in the EU for a total value of EUR 59 million, with Spain being the main landing country. The majority of EU trade flows of megrim products concern intra-EU trade. These partly consist of EU vessels landing in other EU countries (especially Spain), which are recorded as exports within Eurostat COMEXT. Spain is by far the biggest market for megrim in the EU, and demand from the Spanish market appears to be the main driver of first-sales prices among major producing countries throughout the year.

5.1. Biology resource and exploitation

Biology

Megrim (*Lepidorhombus whiffiagonis*) is a deep-sea flatfish, commonly found at depths of 200-300 m, over muddy or sandy seabeds. It is rarely found in waters shallower than 50 m, but has been found at depths of over 1.000 m. Megrim is distributed in deep waters all around the British Isles, with its range extending from Scandinavian and Icelandic waters to the coastline of northern Africa and into the Mediterranean. It is believed that megrim migrates to the west of the British Isles to spawn, as well as to separate spawning grounds in the Mediterranean. They feed on small fishes living on or near the seabed, along with crustaceans and molluscs[61]. Megrim can grow to a length of around 60 cm, although commonly grow to 35-45 cm, and live for a maximum of 14-15 years[62]. A second species of megrim, the four-spot megrim (*Lepidorhombus boscii*), is very similar to *L. whiffiagonis* but can be distinguished by spots at the rear of the fins. In commercial catches, the two species of megrim are often classed together as a single species.

Resource, exploitation, and management in the EU

Megrim is both a targeted species and a valuable bycatch species in the mixed demersal trawl fishery, particularly in the Celtic Sea and the Bay of Biscay. It is mainly caught as a targeted species together with hake, anglerfish, Norway lobster and others, and as bycatch in fisheries for demersal species such as cod and haddock.

In terms of management, megrim catches are limited by a combined TAC for both *Lepidorhombus boscii* and *Lepidorhombus whiffiagonis*. In the Celtic Sea, West of Ireland, and Bay of Biscay, stocks are in a very healthy state, with fishing pressures falling within sustainable limits for the first time, and population sizes at record levels[63]. Beyond TACs, the megrim fishery is managed by an EU Minimum Conservation Reference Size of 20 cm (25 cm in Skagerrak/Kattegat)[64].

5.2. Production

Catches

Global production of megrim amounted to 18.329 tonnes in 2018, almost exclusively caught by the EU fleet (98% of global catch volume). The leading producers were by far France (28%), UK (27%), Spain (23%) and Ireland (16%). The only extra-EU producers were Iceland, Norway and Albania. Most producing countries reported catches of *Lepidorhombus*

[61] https://britishseafishing.co.uk/megrim/
[62] https://www.mcsuk.org/goodfishguide/fish/99
[63] http://ices.dk/sites/pub/Publication%20Reports/Advice/2019/2019/meg.27.7b-k8abd.pdf, http://www.ices.dk/sites/pub/Publication%20Reports/Advice/2019/2019/ldb.27.8c9a.pdf, http://www.ices.dk/sites/pub/Publication%20Reports/Advice/2020/2020/lez.27.6b.pdf
[64] https://mare.istc.cnr.it/fisheriesv2/species_en?sn=20233#ecl-accordion-header-conserv-meas

whiffiagonis alone, except for the UK, Spain, Germany and Portugal, which reported catches of both *Lepidorhombus boscii* and *Lepidorhombus whiffiagonis*, and/or a category of megrim where species is unspecified.

Between 2009 and 2018, total catches of megrim experienced a 5% increase, mostly attributable to a growth in French and Irish catches (+54% and +36%, respectively), which can be linked to the evolution of TAC and quotas for megrim. On the other hand, long-term decreasing trends were reported by Spain (-35%), and Portugal (-49%), whilst UK catches remained stable.

Table 31. **TOTAL WORLD CATCHES OF MEGRIM[65] (volume in tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
France	3.267	3.749	3.441	3.620	4.691	4.468	5.286	5.496	5.348	5.047
United Kingdom	4.961	4.854	4.602	4.464	5.286	4.993	4.777	4.936	4.645	4.975
Spain	6.522	5.639	5.543	5.013	6.100	4.864	4.655	4.580	4.662	4.246
Ireland	2.167	2.719	2.533	3.448	3.439	2.896	3.009	3.281	3.206	2.947
Iceland	-	252	320	409	375	327	479	460	440	369
Belgium	212	278	338	613	539	189	246	304	361	353
Greece	-	-	-	-	-	-	59	57	98	123
Others	306	207	205	204	239	247	235	251	285	269
Total	**17.435**	**17.698**	**16.982**	**17.771**	**20.669**	**17.984**	**18.746**	**19.365**	**19.045**	**18.329**

Source: FAO.

Landings in the EU

In 2018, landings of megrim in the EU amounted to 16.103 tonnes for a total value of EUR 59 million. Spain was the most important landing country, accounting for 36% of landing volume and 44% of landing value. Other major landing countries were the UK (22% of landing volume), France (17%) and Ireland (13%). Differences between volumes of catches and landings for each of the major EU fishing countries can be explained by significant shares of megrim catches being landed in another member state, such as UK and French vessels landing in Spanish ports.

Over the 2009-2018 period, megrim landings experienced a 14% decrease in volume, mainly due to landings in Spain plummeting between 2012 and 2014 and landings in Ireland falling sharply between 2017 and 2018. Value in real terms fell by 10% from 2009[66].

[65] Includes catches reported under megrim, four-spot megrim and megrims nei.
[66] Values are deflated by using the GDP deflator (base=2015).

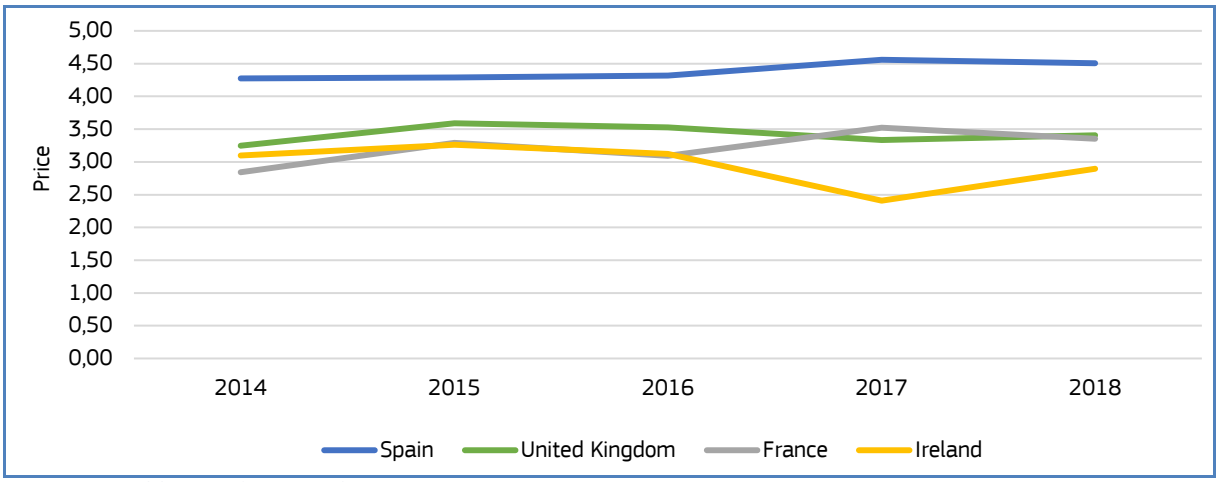
Table 32. **LANDINGS OF MEGRIM IN THE EU (volume in tonnes)** [67]

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Spain	8.296	8.098	7.313	8.038	6.374	4.888	4.793	4.718	4.690	5.818
United Kingdom	4.319	3.918	3.531	3.666	4.411	3.455	3.304	3.544	3.431	3.849
France	1.550	1.695	2.719	2.833	2.995	2.796	3.378	3.520	3.227	3.026
Ireland	4.108	4.724	4.364	5.141	3.321	3.998	5.107	6.522	5.826	2.712
Belgium	200	254	318	576	502	162	233	282	339	309
Greece							59	57	99	123
Denmark	33	26	30	37	53	45	47	66	87	101
Others	114	106	123	65	97	146	148	110	139	165
Totals	**18.619**	**18.821**	**18.399**	**20.357**	**17.753**	**15.491**	**17.069**	**18.819**	**17.837**	**16.103**

Source: EUROSTAT.

Analysis of the average annual landing prices in the main landing countries between 2014-2018 shows two different situations. Trends in Spain and France seem linked, with a slight increase in average annual prices between 2016 and 2017 and a slight decrease between 2017 and 2018. Conversely, average annual prices in the UK and Ireland fell from 2016 to 2017 and rose in 2018. The relationship between price and volume appears obvious - when volume increases, price decreases. For the whole period, despite higher volumes sold, prices were higher in Spain (over 4,00 EUR/kg) than in the other main producing countries (2,50-3,50 EUR/kg). The main reason is that Spain is the main consumption market for megrim so prices are higher where demand is high.

Figure 46. **MEGRIM: AVERAGE ANNUAL PRICES AT LANDING STAGE IN MAIN PRODUCING COUNTRIES (EUR/kg)**



Source: EUMOFA elaboration of EUROSTAT data.

Marketing and consumption

Most EU catches of megrim are consumed in Spain, where the species is appreciated for its low-fat, white flesh. Megrim is marketed as fresh whole fish or fresh fillets, and also as frozen fillets. The species is not well-known or widely consumed in the other producing countries, although in recent years there have been several initiatives to promote the fish to

[67] Totals do not correspond exactly to actual sums because of roundings.

consumers. For example, when megrim is sold to UK consumers it is often given an alternative name in an effort to make the species more appealing. " Megrim sole" and "Cornish sole" are two of the most common alternative names[68].

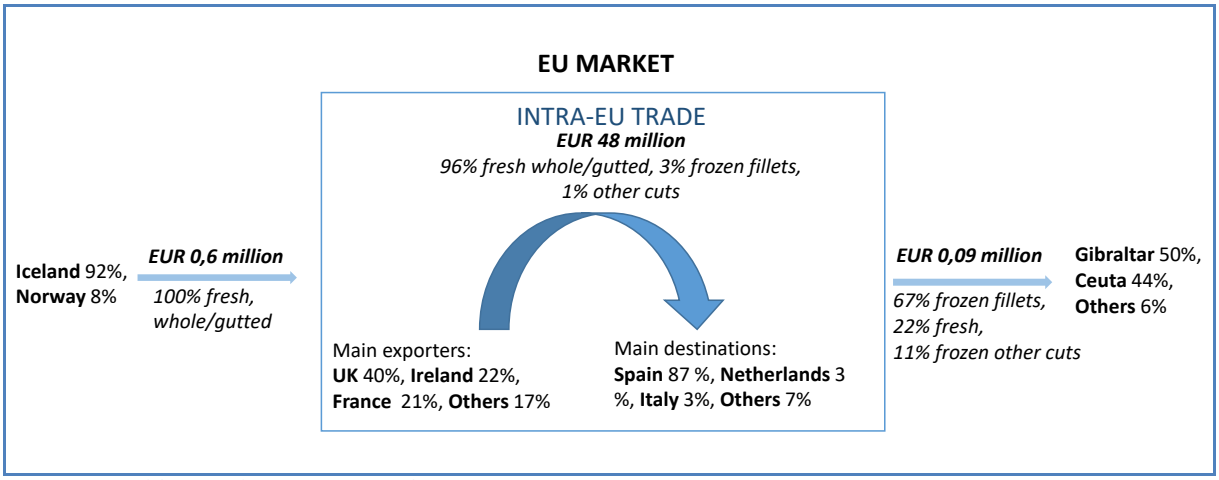
5.3. International trade

In the Combined Nomenclature (CN) used in the EU-import-export data, megrim is classified as whole, fresh/chilled, frozen fillets or frozen other cuts[69]. Overall, EU trade flows with third countries are very low for megrim products compared to intra-EU trade flows.

In 2019, the EU experienced a trade deficit for megrim products amounting to EUR 0,5 million. Most of this deficit was attributable to imports of fresh/chilled whole megrim from Iceland. In 2019, extra-EU imports reached 163 tonnes for a value of almost EUR 0,6 million, of which 92% was from Iceland in terms of value. Extra-EU exports of megrim products are very limited (91.030 EUR for 10 tonnes in 2019), and are dominated by frozen fillets almost exclusively destined for Gibraltar and Ceuta, territories with close links to the Spanish market.

In 2019, intra-EU exports reached a value of EUR 48 million for 10.212 tonnes. Of the total value, 96% was attributable to fresh whole products, whilst a significant portion of these flows corresponded to EU vessels landing in another member state. The UK, and to a lesser extent Ireland and France, were by far the biggest megrim suppliers to other EU countries, whilst Spain was the main destination.

Figure 47. **THE MEGRIM EU-TRADE MARKET IN 2019, IN VALUE**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

5.4. First sales in the EU

The monthly data regarding first sales in major producing EU countries does not show a clear common seasonality of the megrim fishery. Whilst higher volumes are sold in spring and summer in the UK and Spain, the trend seems to be the opposite in France, where higher volumes are reportedly sold in the first quarter of the year. However, there can be variations from one year to the next.

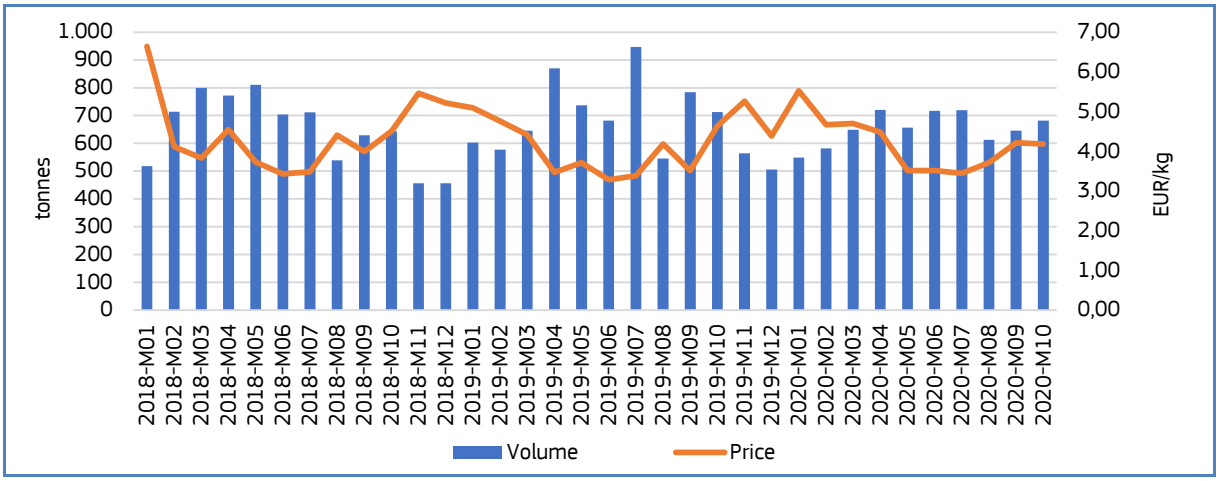
Throughout the year, monthly first-sales volumes in Spain fluctuated between 400 and 1.000 tonnes, whilst they were lower in France (between 150 and 300 tonnes) and in the UK (between 100 and 400 tonnes). In 2019, the port of Vigo was the most significant place of sale for megrim in Spain, accounting for almost 70% of the nation's total first-sales volume. Other key ports were A Coruña (8%) and Ondárroa (6%). In France, the main place of sale was Le Guilvinec, accounting for 47%

[68] https://britishseafishing.co.uk/megrim/
[69] 03022910: Megrim (*Lepidorhombus* spp.), excluding edible fish offal of subheadings 0302 91 to 0302 99, fresh or chilled; 03048350: Megrim (*Lepidorhombus* spp.), fillets, frozen; 03049955: Megrim (*Lepidorhombus* spp.), other meat (whether or not minced), frozen.

of total first-sales volume in 2019. Other key ports were Lorient (13%) and Loctudy (12%). In the UK, the main places of sale for megrim were Lerwick (19% of total volume), Kinlochbervie (17%), Scrabster and Peterhead (15% each).

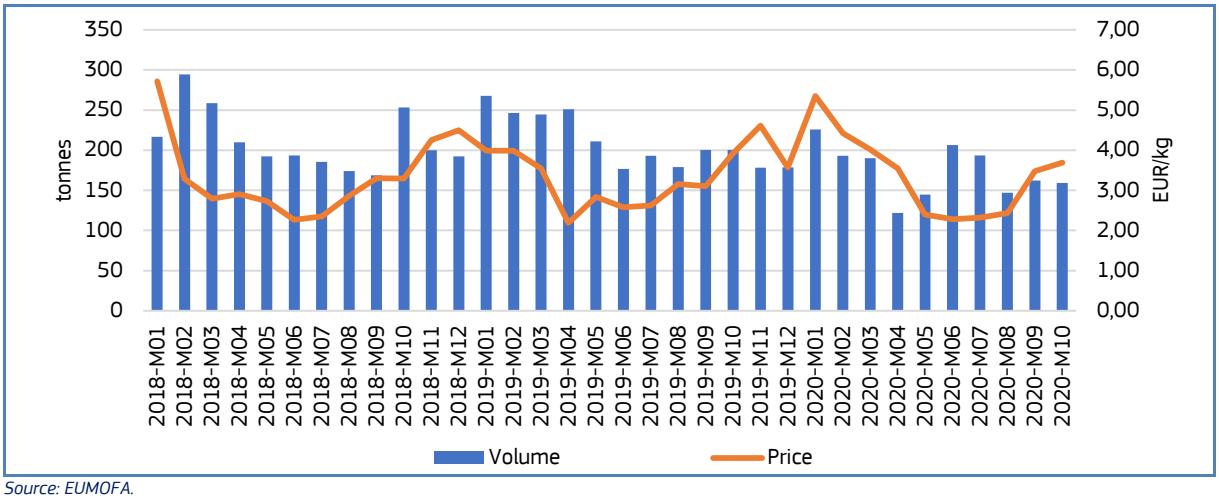
The variation in landed volumes leads to significant price fluctuations, from 2,20 EUR/kg to almost 5,70 EUR/kg over the January 2018 to October 2020 period. In Spain and the UK, prices fall when first-sales volume increases from spring to autumn, and prices increase sharply at the end of the fishing season. This pattern is less clear in French first-sales data – whilst prices follow the same fluctuations as those observed in Spain and the UK, the seasonality of volume is different. Overall, first-sales prices clearly follow the same trend in the three countries, demonstrating a connected megrim market, with the Spanish market being the biggest consumption market and thus driving the evolution of prices.

Figure 48. **FIRST SALES: MEGRIM IN SPAIN (volume in tonnes, price in EUR/kg)**



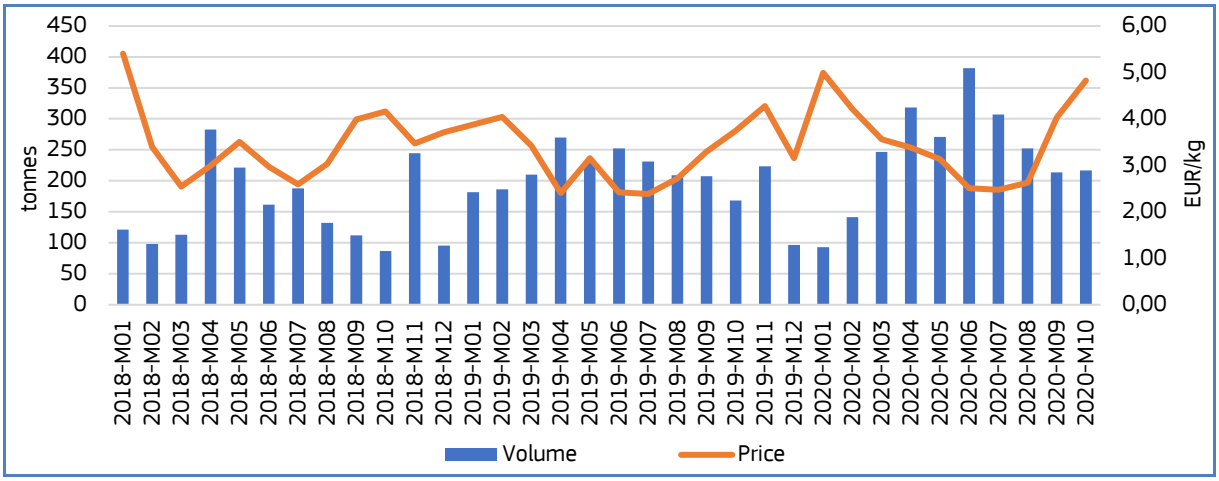
Source: EUMOFA.

Figure 49. **FIRST SALES: MEGRIM IN FRANCE (volume in tonnes, price in EUR/kg)**



Source: EUMOFA.

Figure 50. **FIRST SALES: MEGRIM IN THE UK (volume in tonnes, price in EUR/kg)**



Source: EUMOFA.

6. Global highlights

EU / Sustainable fisheries: In the recently published "Report on the establishment of a Union framework for the collection, management and use of data in the fisheries sector and support for scientific advice regarding the common fisheries policy", the European Commission assesses the implementation and functioning of the data collection framework (DCF) (Regulation (EU) 2017/1004). The report concludes that the DCF provides the appropriate structure, tools, and flexibility for data collection in the fisheries and aquaculture sectors. The coming years need to focus on continued cooperation with EU countries and on solidifying the implementation of the regulation at the regional level[70].

GFCM / Fisheries management: The high-level virtual meeting on the future strategy for the Mediterranean and Black Sea took place in early November, under the umbrella of the FAO General Fisheries Commission for the Mediterranean (GFCM). Participants reconfirmed the political commitments under the MedFish4Ever and Sofia Declarations, and launched a process defining a new common strategy for ensuring the sustainability of fisheries and aquaculture in the Mediterranean and Black Seas. The countries reaffirmed their commitment to reinforce their efforts on key priorities and to work together towards ensuring the sustainability of fisheries and aquaculture. The GFCM will continue to work on the future strategy for 2021-2025[71].

North East Atlantic / Fisheries opportunities: In early November, delegations of the European Union, the Faroe Islands, Norway, Iceland, Greenland, the Russian Federation, and the United Kingdom reached an agreement on management measures for blue whiting and Atlanto-Scandian herring in the North East Atlantic for 2021. Both stocks have a total allowable catch (TAC) set in line with recommended scientific advice. The delegations also held a first round of consultations on 2021 management measures for mackerel and on 2021 monitoring, control, and surveillance (MCS) measures for pelagic stocks[72].

IOTC / RFMO: A regional fisheries management organisation (RFMO) - the Indian Ocean Tuna Commission (IOTC) - met for its 24th Session between the 2nd and 6th November 2020. The meeting was held by video-conference and with a reduced agenda, mainly focusing mainly on budgetary and administrative issues. Notwithstanding the constraints of the format, the IOTC was able to agree upon the EU's proposal, and to schedule a Special Session of IOTC in March 2021 to discuss a management plan for yellowfin tuna. The EU is strongly committed to working with all the parties of IOTC to ensure the adoption of an ambitious and effective recovery plan for yellowfin tuna stock that achieves the recommended catch reductions and covers all active fishing vessels regardless of size and area of operation, particularly vessels using large-scale drift nets[73].

EU / Senegal / Fisheries opportunities: On 11 November, the plenary session of the European Parliament approved the fishing protocol of the EU and Senegal, which gives access to the waters of the African country to vessels from Spain, France, and Portugal to mainly fish tuna as well as black hake over a period of five years. The protocol provides with tuna fishing opportunities for up to 28 freezer tuna seiners, ten pole-and-line vessels and five longliners, as well as black hake fishing opportunities for two Spanish trawlers (1.750 tonnes per year). The annual EU financial contribution is EUR 1,7 million, of which EUR 800.000 represents a payment to access Senegal's waters. The remaining EUR 900.000 will provide with sectoral support to implement Senegal's fisheries policy[74].

[70] https://ec.europa.eu/fisheries/press/commission-assesses-data-collection-framework-sustainable-fisheries_en
[71] https://ec.europa.eu/fisheries/press/gfcm-high-level-meeting-building-new-strategy-mediterranean-and-black-sea-fisheries-and_en
[72] https://ec.europa.eu/fisheries/press/north-east-atlantic-coastal-states-reach-agreement-blue-whiting-and-atlanto-scandian-herring-0_en
[73] https://ec.europa.eu/fisheries/press/iotc-agrees-dedicated-2021-session-address-yellowfin-tuna_en
[74] https://www.europarl.europa.eu/news/en/press-room/20201111IPR91303/parliament-backs-the-renewed-fisheries-partnership-with-senegal

7. Macroeconomic Context

7.1. Marine fuel

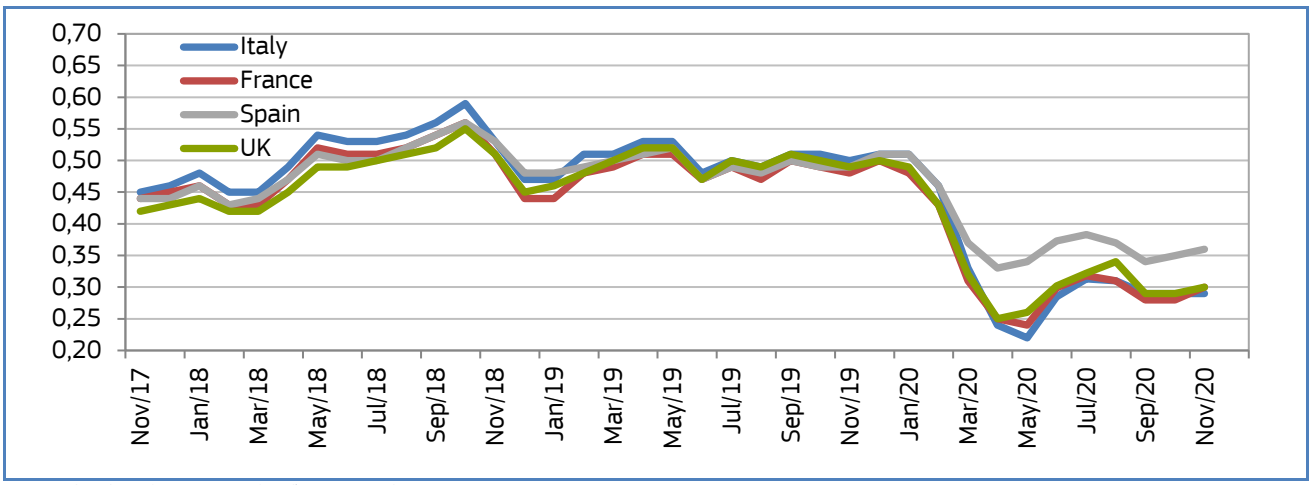
Average prices for marine fuel in **November 2020** ranged between 0,29 and 0,36 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices increased about 3% compared with the previous month, however it decreased 36% compared with the same month in 2019.

Table 33. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Nov 2020	Change from Oct 2020	Change from Nov 2019
France *(ports of Lorient and Boulogne)*	0,30	7%	-38%
Italy *(ports of Ancona and Livorno)*	0,29	0%	-42%
Spain *(ports of A Coruña and Vigo)*	0,36	3%	-27%
The UK (ports of Grimsby and Aberdeen)	0,30	3%	-39%

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

Figure 51. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**



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

7.2. Consumer prices

The EU annual inflation rate was at 0,3% in October 2020, stable compared to September. A year earlier, the rate was 1,1%.

Inflation: lowest rates in October 2020, compared with September 2020.

Inflation: highest rates October 2020, compared with September 2020.

Table 34. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

HICP	Oct 2018	Oct 2019	Sep 2020	Oct 2020	Change from Sep 2020		Change from Sep 2019	
Food and non-alcoholic beverages	104,84	106,90	108,66	109,01	↑	0,3%	↑	2,0%
Fish and seafood	109,31	110,78	112,61	112,39	↓	0,2%	↑	1,5%

Source: Eurostat.

7.3. Exchange rates

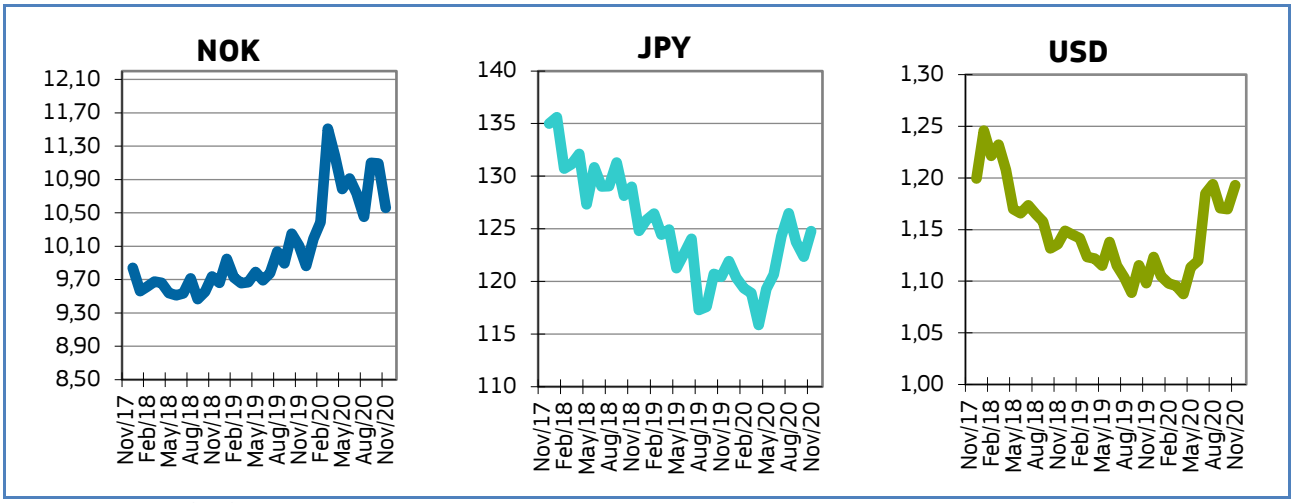
Table 35. **EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Nov 2018	Nov 2019	Oct 2020	Nov 2020
NOK	9,7400	10,1045	11,0940	10,5610
JPY	128,99	120,43	122,36	124,79
USD	1,1359	1,0982	1,1698	1,1930

Source: European Central Bank.

In November 2020, the euro depreciated against the Norwegian krone, but appreciated against the US dollar and the Japanese yen (+0,1% and +2,0%, respectively) relative to the previous month. For the past six months, the euro has fluctuated around 1,17 against the US dollar. Compared with November 2019, the euro has appreciated 3,6% against the Japanese yen, 4,5% against the Norwegian krone, and 3,6% against the US dollar.

Figure 52. **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: European Commission, Council of the European Union, European Parliament's Committee on Fisheries., FAO

Consumption: EUROPANEL.

Case studies: FAO, the World Bank, Central Intelligence Agency, Seafood Tip, SciELO Brazil, Peixe BR, Norwegian Seafood Council, EU Council, European Commission, MercoPress, Instituto Brasileiro de Geografia e Estatistica, British Sea Fishing, Marine Conservation Society, ICES, Eurostat.

Global highlights: DG Mare - European Commission, European Parliament.

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

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

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

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

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

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

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

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