

Monthly Highlights

No. 2 / 2021

EUMOPA

European Market Observatory for
Fisheries and Aquaculture Products

In this issue

According to data collected by EUMOPA from 13 EU Member States, in November 2020 striped venus and whelk together accounted for 12% of the total first-sales value of the “Bivalves and other molluscs and aquatic invertebrates” commodity group.

From 2018 to 2020, the price of live, fresh, or chilled mussels imported in the EU from Norway fluctuated from 2,04 to 7,09 EUR/kg. In 2020, both price and volume exhibited a downward trend.

Over the last four years, German consumers spent the most for a kilogram of fresh cod, (18,00 EUR/kg on average) compared to France (16,80 EUR/kg) and the Netherlands (16,30 EUR/kg).

In 2019, the EU imports of fisheries and aquaculture products from South Africa accounted for over EUR 295 million and 80.597 tonnes. Hake, squid, and fishmeal constitute the bulk share of EU imports.

The largest market for horse mackerel exported by the EU is Egypt. In 2019, exports to the country reached 54.000 tonnes, worth EUR 51 million, accounting for 50% of total export volume and 47% of value.

In January 2021, the EU and Greenland concluded negotiations for a new four-year Sustainable Fisheries Partnership Agreement (SFPA), which is the third most important agreement in place for the EU in financial terms.



As of 2021, the Monthly Highlights include **Bulgaria** among surveyed countries.

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1. First sales in Europe

During **January–November 2020**, 13 EU Member States (MS), Norway, and the United Kingdom reported first-sales data for 10 commodity groups¹. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section “*First sales in Europe*” are extracted from EUMOFA².

1.1. January–November 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 Lithuania, the increase was sharp due to a higher supply of herring and sprat.

Decreases in value and volume: Belgium, Bulgaria, Denmark, France, Italy, the Netherlands, Poland, and Sweden all recorded decreases in value and volume. Bulgaria stood out with the most significant decline, which was due to a lower supply of sprat, while decreases in Poland and Sweden were primarily caused by a decline in herring and sprat sales.

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

Country	January - November 2018		January - November 2019		January - November 2020		Change from January - November 2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	13.012	55,11	12.424	53,08	11.316	50,54	-9%	-5%
Bulgaria	2.995	2,07	4.784	2,60	2.514	1,65	-47%	-37%
Denmark	257.916	345,54	241.078	324,96	197.141	256,07	-18%	-21%
Estonia	43.595	11,06	55.849	12,30	58.112	14,97	4%	22%
France	175.649	582,60	165.187	556,81	144.839	480,41	-12%	-14%
Italy	87.736	318,89	87.784	338,11	76.751	288,90	-13%	-15%
Latvia	44.534	8,03	48.264	8,15	44.259	9,08	-8%	11%
Lithuania	1.603	1,17	854	0,64	2.168	0,85	154%	33%
Netherlands	329.168	507,48	225.971	353,96	213.727	325,23	-5%	-8%
Norway	2.875.300	2.401,60	2.701.648	2.480,04	2.810.598	2.356,05	4%	-5%
Poland	102.865	32,66	89.974	25,87	73.850	18,55	-18%	-28%
Portugal	112.064	236,87	122.445	249,25	97.267	214,74	-21%	-14%
Spain	461.246	1.265,37	448.372	1.281,93	459.983	1.249,13	3%	-3%
Sweden	202.443	95,06	170.712	86,78	116.835	69,47	-32%	-20%
UK	249.735	478,24	268.890	561,89	281.386	457,35	5%	-19%

Possible discrepancies in % changes are due to rounding.

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

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 16.1.2021.

1.2. November 2020 compared to November 2019

Increases in value and volume: First sales increased in France, Latvia, Lithuania, the Netherlands, and Spain. Higher sales of herring were behind the sharp increases in Latvia, Lithuania, and the Netherlands, while sardine sales were behind increases in Spain.

Decreases in value and volume: First sales fell in Denmark, Estonia, Norway, and Poland. The most significant decrease in absolute terms were observed in Norway and Poland, due to lower first-sales value and volume of herring. A lower supply of mackerel led to a sharp decrease in first sales in Denmark.

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

Country	November 2018		November 2019		November 2020		Change from November 2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.446	5,76	1.144	5,37	1.153	4,27	1%	-21%
Bulgaria	343	0,25	312	0,25	308	0,31	-1%	25%
Denmark	38.109	46,48	31.237	38,11	21.036	23,96	-33%	-37%
Estonia	6.023	1,89	8.621	1,70	7.663	1,61	-11%	-6%
France	15.915	52,82	14.284	47,08	15.393	48,92	8%	4%
Italy	7.912	28,22	6.962	27,73	7.272	26,61	4%	-4%
Latvia	8.492	1,43	4.139	0,75	5.168	1,05	25%	40%
Lithuania	271	0,12	124	0,05	369	0,11	196%	113%
Netherlands	19.984	39,11	4.534	19,75	11.217	22,78	147%	15%
Norway	298.573	253,73	296.127	248,43	218.055	189,01	-26%	-24%
Poland	9.209	2,99	5.452	1,63	916	0,24	-83%	-85%
Portugal	6.498	16,85	9.634	15,27	8.089	17,26	-16%	13%
Spain	42.138	115,93	27.854	98,93	39.010	106,80	40%	8%
Sweden	20.466	8,53	14.805	6,86	14.905	6,16	1%	-10%
UK	38.348	77,30	25.630	54,15	28.854	46,30	13%	-14%

Possible discrepancies in % changes are due to rounding.

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

The most recent weekly first-sales data (**up to week 7 of 2021**) are available via the EUMOFA website, and can be accessed [here](#).

The most recent monthly first-sales data **for December 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 EUMOFA³.

Table 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES⁴ IN BELGIUM**


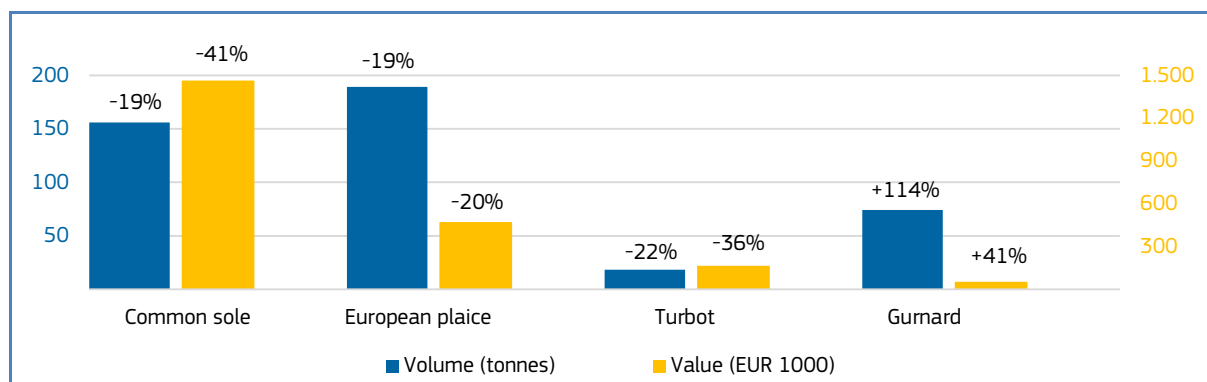

 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2020 vs Jan-Nov 2019	EUR 50,5 million, -5%	11.316 tonnes, -9%	European plaice, turbot, other sole* (i.e. other than common sole), shrimp <i>Crangon</i> spp., cod.
Nov 2020 vs Nov 2019	EUR 4,3 million, -21%	1.153 tonnes, +1%	Value: Common sole, European plaice, turbot. Volume: gurnard, cod, other sole*.

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



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

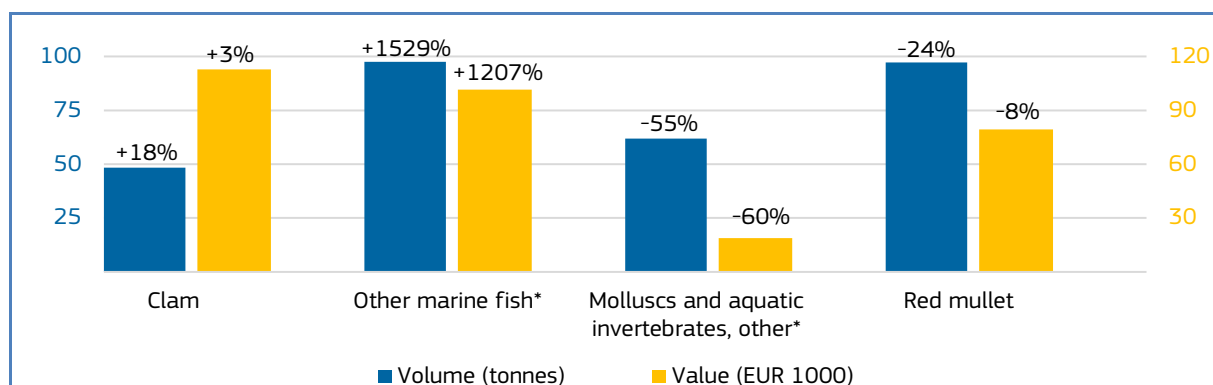
Table 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA**

 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2020 vs Jan-Nov 2019	EUR 1,6 million, -37%	2.514 tonnes, -47%	Molluscs and aquatic invertebrates (other)*, sprat, clam.
Nov 2020 vs Nov 2019	EUR 0,3 million, +25%	308 tonnes, -1%	Value: clam, other marine fish*. Volume: molluscs and aquatic invertebrates (other)*, red mullet.

³ First-sales data updated on 16.12.2020.

⁴ Data on fisheries and aquaculture products harmonised in EUMOFA allow comparisons along the different supply chain stages in EUMOFA.

Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA, NOVEMBER 2020**

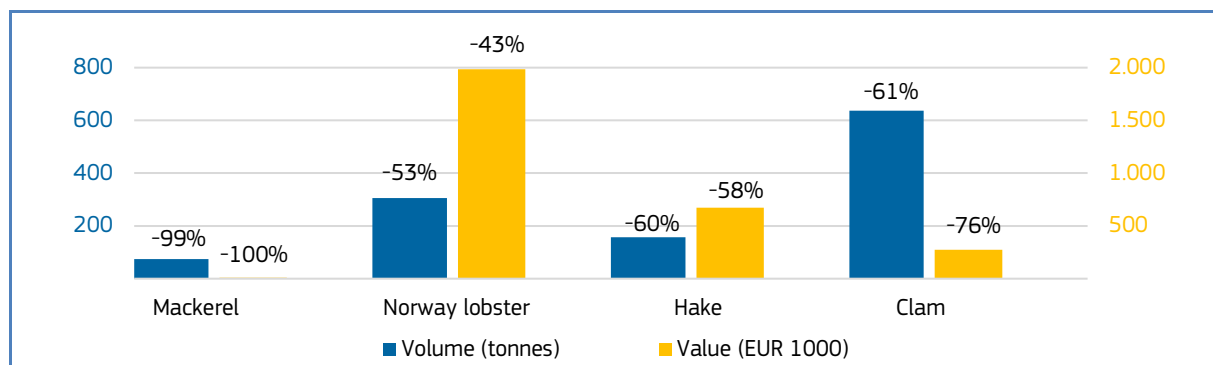


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Nov 2020 vs Jan-Nov 2019	EUR 256,1 million, -21%	197.141 tonnes, -18%	Norway lobster, cod, mackerel, saithe.	The sharp decrease in first sales of mackerel is mostly the result of a change in fishing strategies. Catches by Danish vessels largely took place in early 2020. Prices were strong but a risk of a possible Brexit deadline in June meant that only very limited quotas were left for the autumn period.
Nov 2020 vs Nov 2019	EUR 24,0 million, -37%	21.036 tonnes, -33%	Mackerel, Norway lobster, hake, clam.	

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, NOVEMBER 2020**

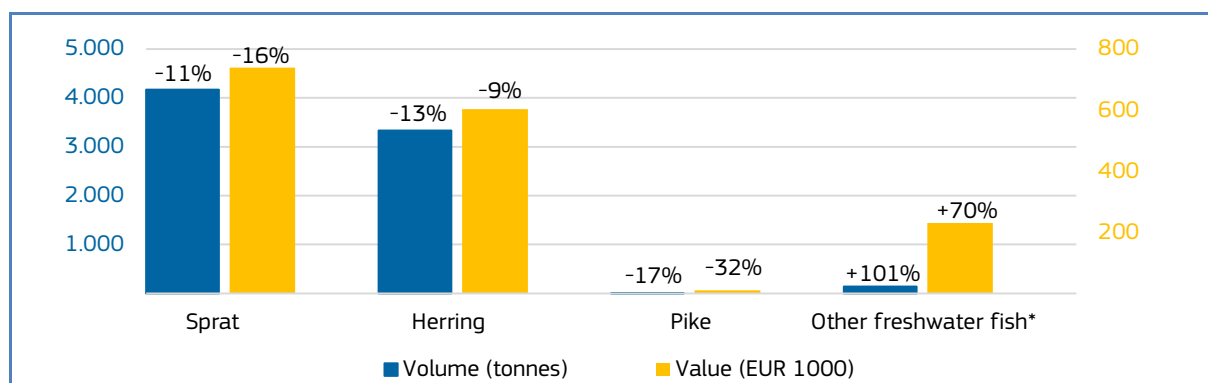


Percentages show change from the previous year.

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2020 vs Jan-Nov 2019	EUR 15,0 million, +22%	58.112 tonnes, +4%	Pike-perch, other freshwater fish*, smelt, herring.
Nov 2020 vs Nov 2019	EUR 1,6 million, -6%	7.663 tonnes, -11%	Sprat, herring, pike, other freshwater fish*.

Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, NOVEMBER 2020**

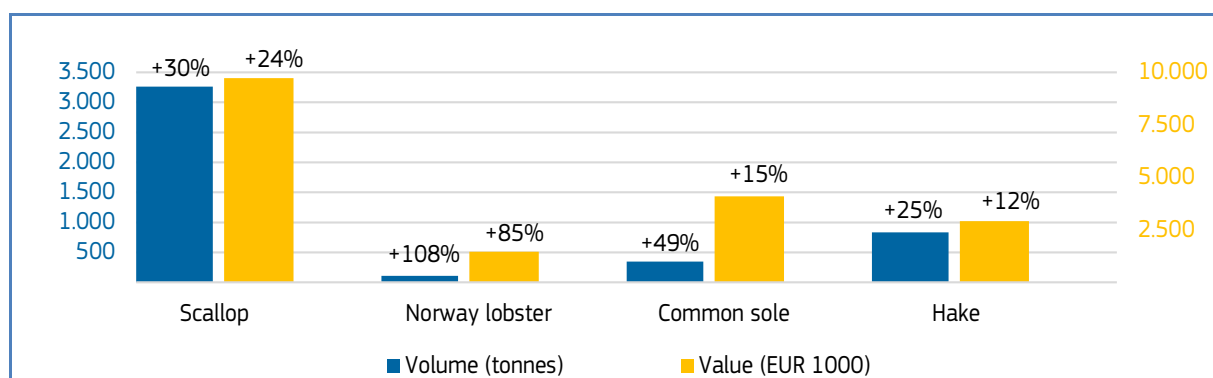


Percentages show change from the previous year. *EUMOFA aggregation for species

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2020 vs Jan-Nov 2019	EUR 480,4 million, -14%	144.839 tonnes, -12%	Monk, hake, squid, cuttlefish, anchovy, albacore tuna.
Nov 2020 vs Nov 2019	EUR 48,9 million, +4%	15.393 tonnes, +8%	Scallop, Norway lobster, common sole, hake.

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, NOVEMBER 2020**



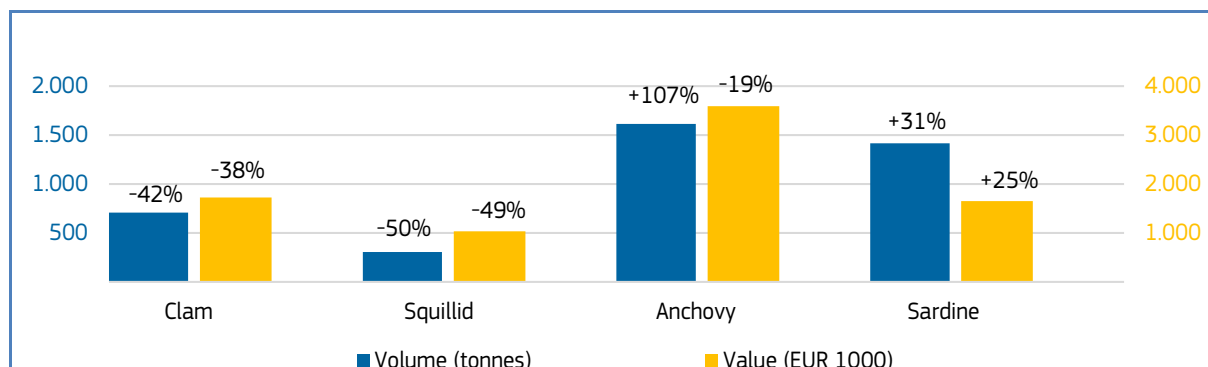
Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2020 vs Jan-Nov 2019	EUR 288,9 million, -15%	76.751 tonnes, -13%	Miscellaneous shrimps*, clam, anchovy, cuttlefish, red mullet, sardine.
Nov 2020 vs Nov 2019	EUR 26,6 million, -4%	7.272 tonnes, +4%	Value: clam, squillid. Volume: anchovy, sardine.



Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, NOVEMBER 2020**



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

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


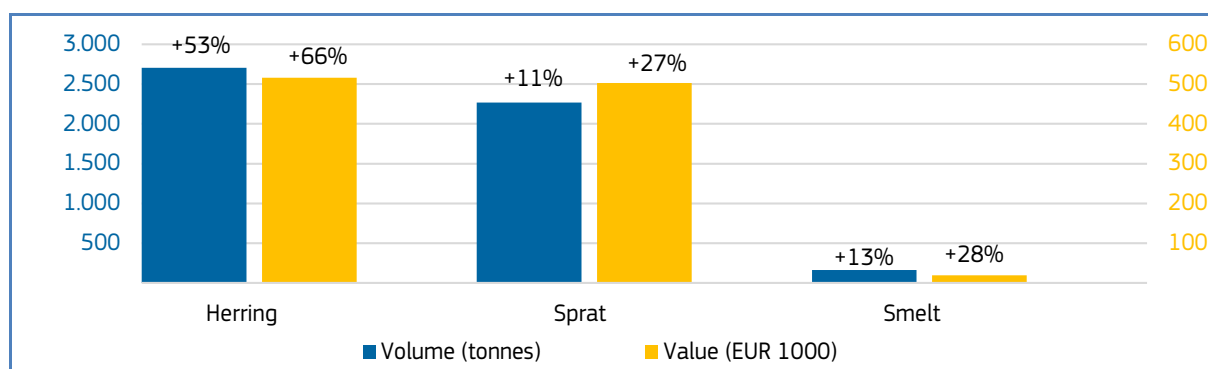
 Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2020 vs Jan-Nov 2019	EUR 9,1 million, +11%	44.259 tonnes, -8%	Value: herring, other freshwater fish*, other marine fish*, cod Volume: sprat, smelt, European flounder.
Nov 2020 vs Nov 2019	EUR 1,1 million, +40%	5.168 tonnes, +25%	Herring, sprat, smelt.

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, NOVEMBER 2020**



Percentages show change from the previous year.

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


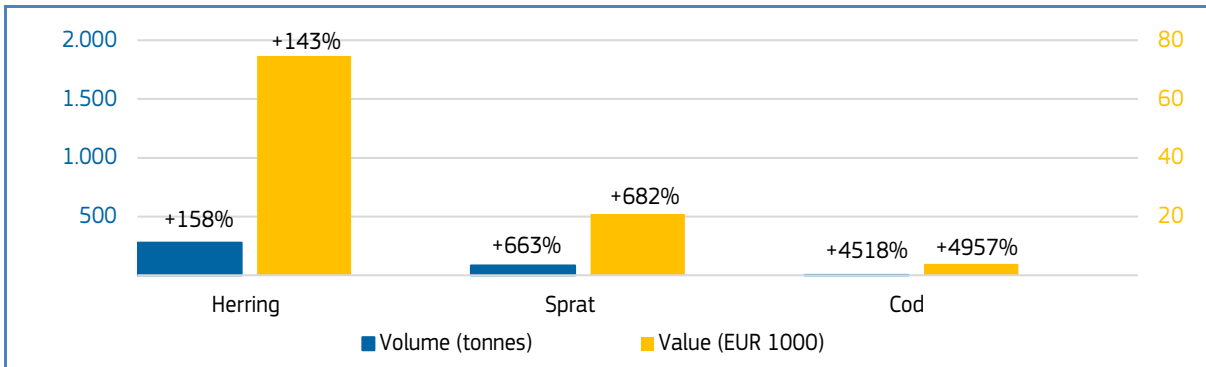
 Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species	Notes
Jan-Nov 2020 vs Jan-Nov 2019	EUR 0,9 million, +33%	2.168 tonnes, +154%	Herring, sprat, European flounder, other groundfish*, pike-perch.	The increases in first sales recorded for sprat are linked to the expansion of the Latvian and Estonian fish processing companies and changes to the transport procedure for sprat. Moreover, fishery restrictions, laid down in COUNCIL REGULATION (EU) 2019/1838 of 30th October 2019, led to many fishing activities shifting from the first half of 2020 to November.
Nov 2020 vs Nov 2019	EUR 0,1 million, +113%	369 tonnes, +196%	Herring, sprat, cod.	



Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, NOVEMBER 2020**



Percentages show change from the previous year.

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


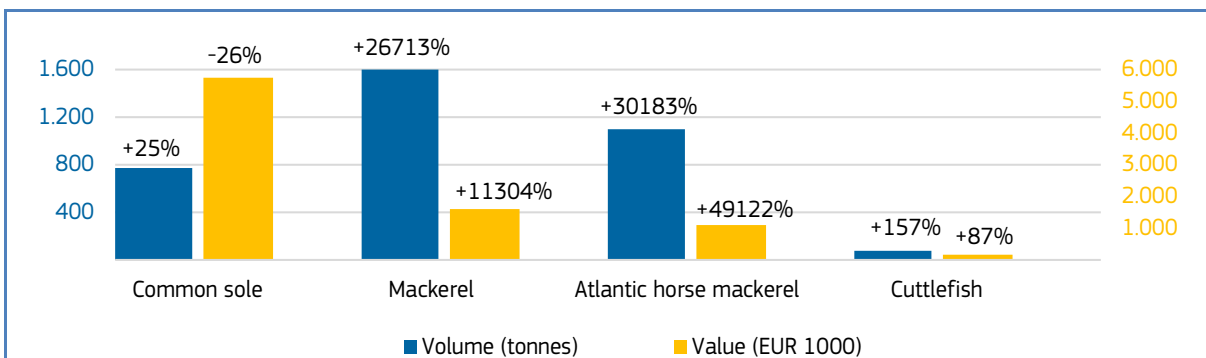
 The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Nov 2020 vs Jan-Nov 2019	EUR 325,2 million, -8%	213.727 tonnes, -5%	Blue whiting, common sole, Atlantic horse mackerel, European plaice.	Dutch mackerel production increased from 6 tonnes in November 2019 to 1.600 tonnes in November 2020 (+26713%). Atlantic horse mackerel stocks strongly fluctuated across the different years too. While the production of these two species often strongly fluctuates, usually due to the opportunistic strategies of large pelagic vessels, these trends are mostly due to statistical artefacts as if one compare 2020 data with 2018 data, fluctuation is not as big as that between 2019 and 2020.
Nov 2020 vs Nov 2019	EUR 22,8 million, +15%	11.217 tonnes, +147%	Common sole, mackerel, Atlantic horse mackerel, cuttlefish.	

Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, NOVEMBER 2020**



Percentages show change from the previous year.



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


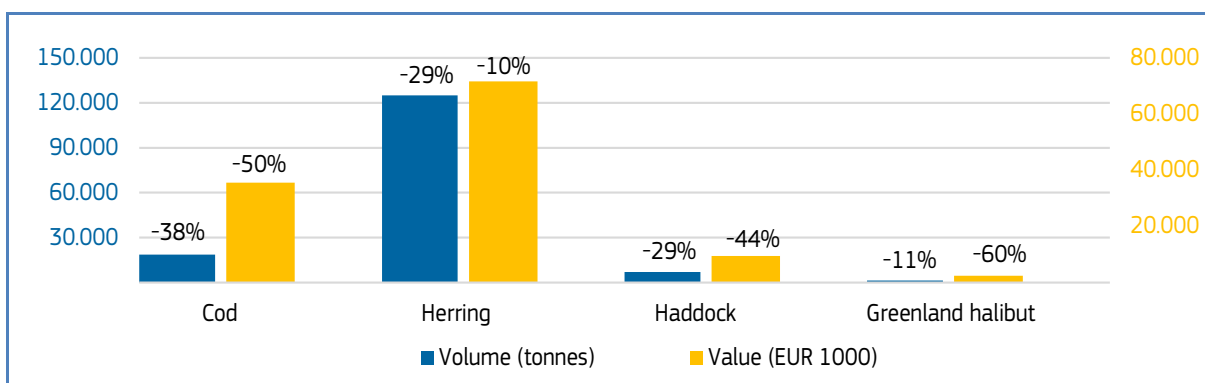
 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2020 vs Jan-Nov 2019	EUR 2.356 million, -5%	2.810.598 tonnes, +4%	Value: cod, haddock, coldwater shrimp. Volume: other groundfish*, mackerel, blue whiting.
Nov 2020 vs Nov 2019	EUR 189,0 million -24%	218.055 tonnes, -26%	Cod, herring, haddock, Greenland halibut.

Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, NOVEMBER 2020**



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

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


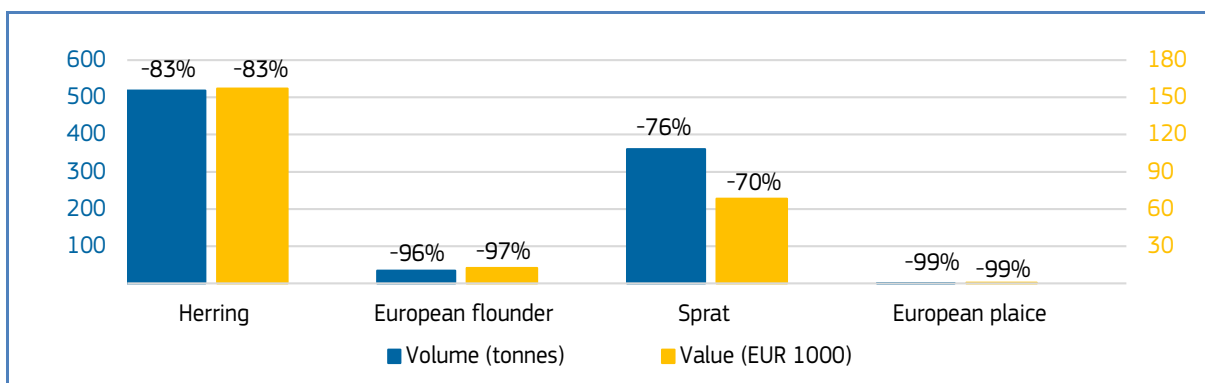
 Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2020 vs Jan-Nov 2019	EUR 18,6 million, -28%	73.850 tonnes, -18%	Cod, European flounder, herring, sprat.
Nov 2020 vs Nov 2019	EUR 0,2 million -85%	916 tonnes, -83%	Herring, European flounder, sprat, European plaice.

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, NOVEMBER 2020**



Percentages show change from the previous year.

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


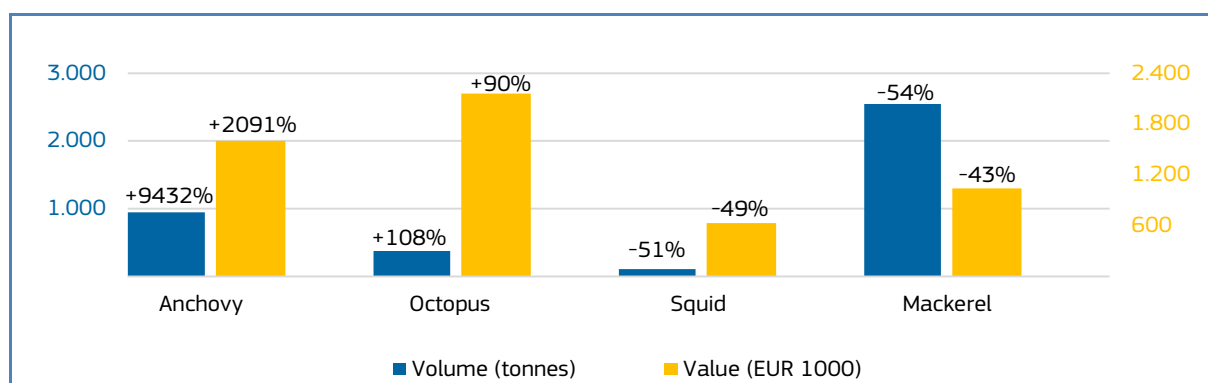
 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2020 vs Jan-Nov 2019	EUR 214,7 million, -14%	97.267 tonnes, -21%	Mackerel, anchovy, squid, Atlantic horse mackerel.
Nov 2020 vs Nov 2019	EUR 17,3 million +13%	8.089 tonnes, -16%	Anchovy, octopus, squid, mackerel.

Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, NOVEMBER 2020**



Percentages show change from the previous year.

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


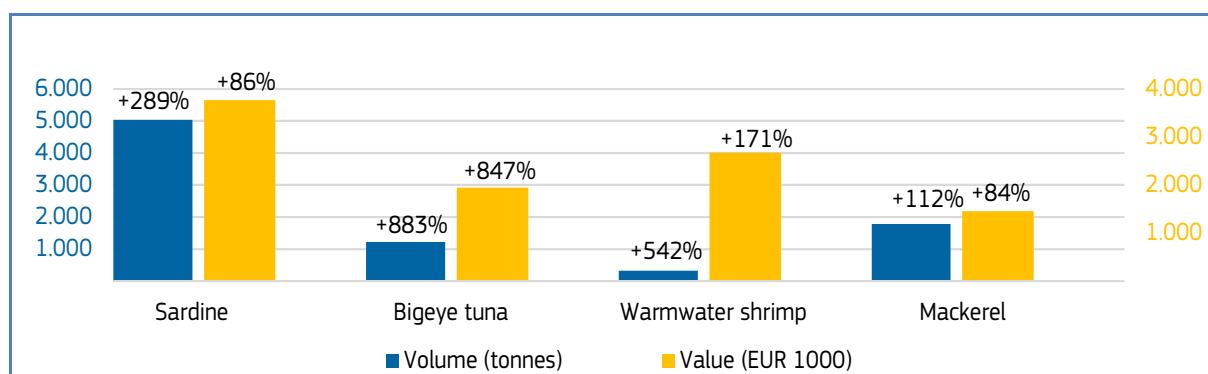
 Spain	First-sales value / trend in %	First-sales volume / trend %	Main contributing species	Notes
Jan-Nov 2020 vs Jan-Nov 2019	EUR 1.249,1 million, -3%	459.983 tonnes, +3%	Value: hake, clam, octopus. Volume: squid, sardine, mackerel.	Sardine recruitment in the Cantabrian Sea and Atlantic Iberian waters has increased significantly over the last two years. The higher recruitment in 2019 caused an upward revision of the initial catch advice ⁵ , which explains the abrupt increase in first-sales value and volume.
Nov 2020 vs Nov 2019	EUR 106,8 million +8%	39.010 tonnes, +40%	Sardine, bigeye tuna, warmwater shrimp, mackerel.	

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, NOVEMBER 2020**



Percentages show change from the previous year.

⁵ ICES. 2020b. Request from Portugal and Spain for an updated advice for 2020 on catch opportunities for sardine (*Sardina pilchardus*) in divisions 8.c and 9.a (Cantabrian Sea and Atlantic Iberian waters). In Report of the ICES Advisory Committee, 2020. ICES Advice 2020, sr.2020.06. <https://doi.org/10.17895/ices.advice.6063>.

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


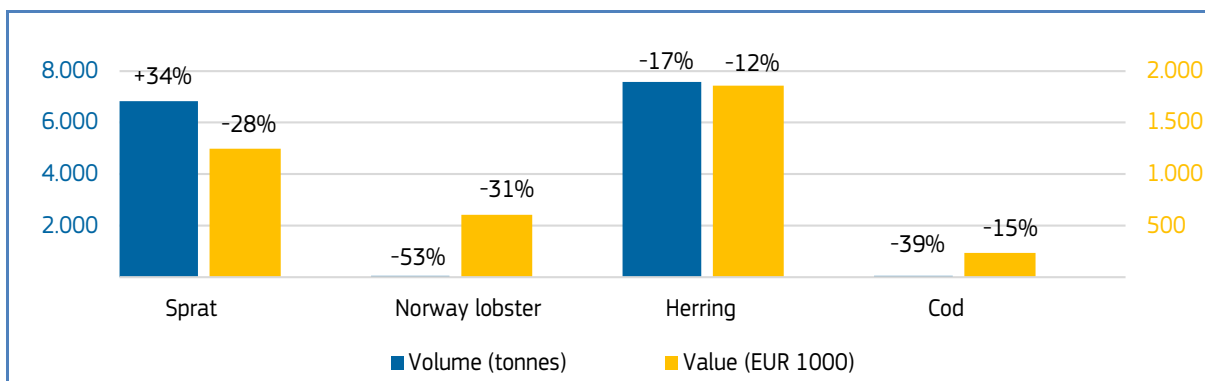
 Sweden	First-sales value / trend in %	First-sales volume / trend %	Main contributing species
Jan-Nov 2020 vs Jan-Nov 2019	EUR 69,5 million, -20%	116.835 tonnes, -32%	Herring, sprat, cod, mackerel.
Nov 2020 vs Nov 2019	EUR 6,2 million, -10%	14.905 tonnes, +1%	Value: sprat, Norway lobster, cod, herring. Volume: sprat.

Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, NOVEMBER 2020**



Percentages show change from the previous year.

Table 17. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM**


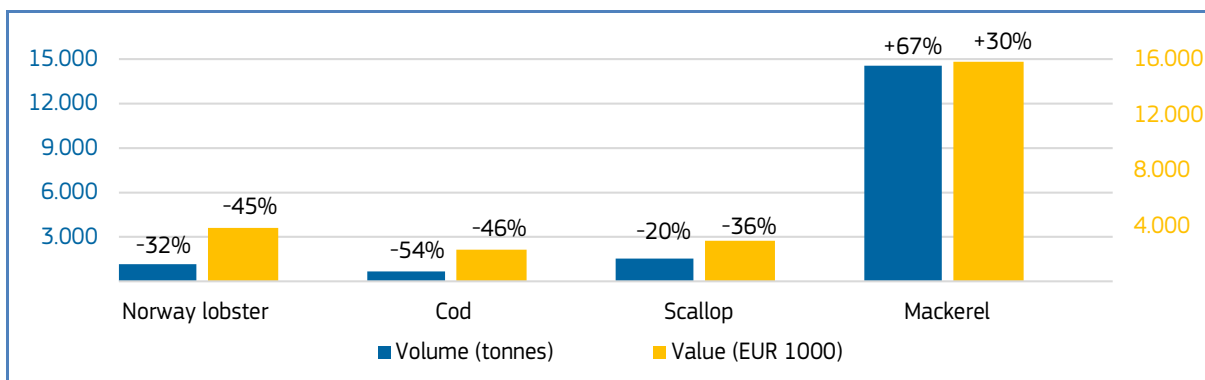
 The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2020 vs Jan-Nov 2019	EUR 457,4 million, -19%	281.386 tonnes, +5%	Value: Norway lobster, crab, cod. Volume: mackerel, blue whiting.
Nov 2020 vs Nov 2019	EUR 46,3 million, -14%	28.854 tonnes, +13%	Value: Norway lobster, cod, scallop. Volume: mackerel.

Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, NOVEMBER 2020**

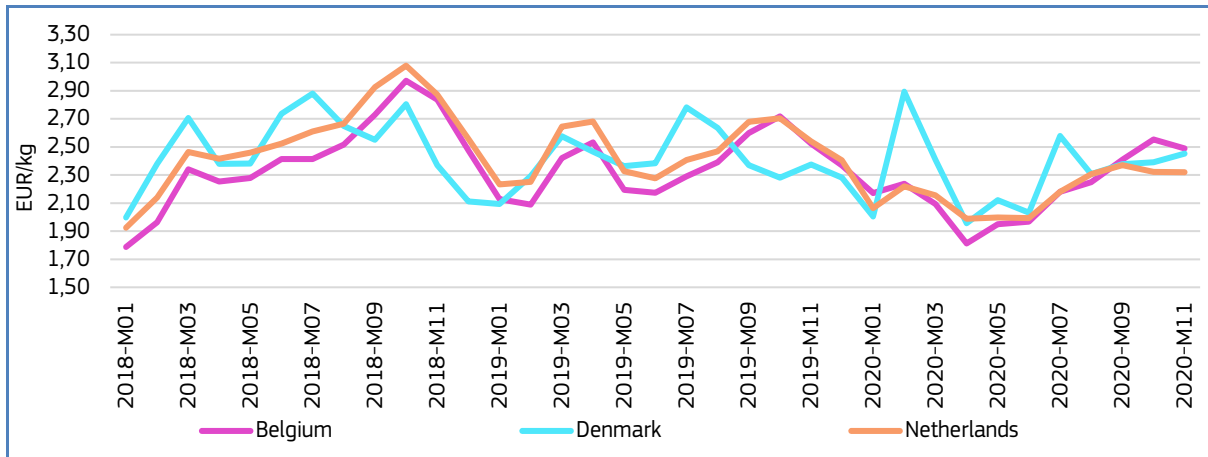


Percentages show change from the previous year.



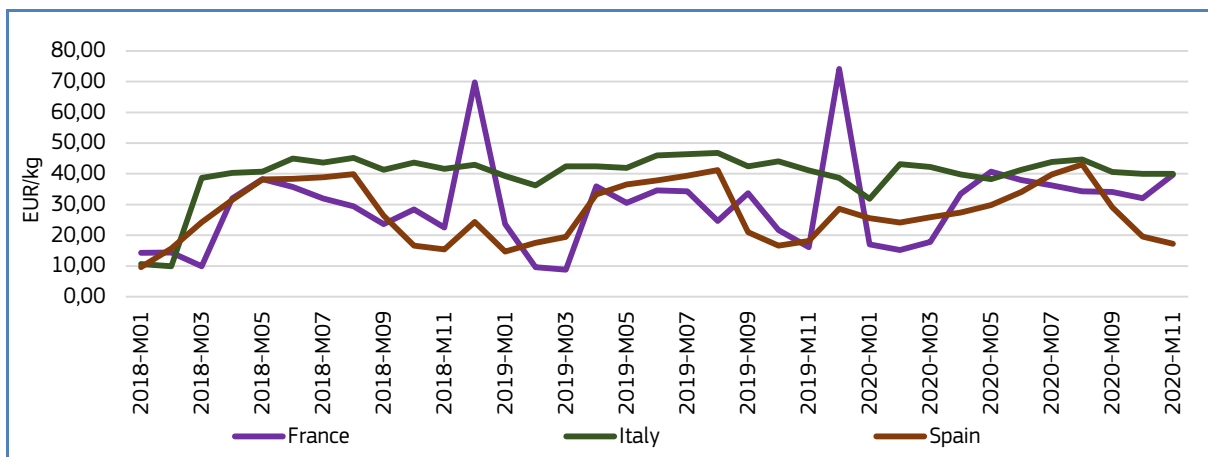
1.4. Comparison of first-sales prices of selected species in selected countries⁶

Figure 16. **FIRST-SALES PRICES OF EUROPEAN PLAICE IN BELGIUM, DENMARK, AND THE NETHERLANDS**



Denmark, the **Netherlands**, and **Belgium** are among the main EU countries in terms of first sales of **European plaice**. Average prices in November 2020 (the most recent available data) were 2,49 EUR/kg in Belgium (down by 2% from the previous month and down by 1% from the previous year), and 2,45 EUR/kg in Denmark (3% up from both October 2020 and November 2019). In the Netherlands, the average price was 2,32 EUR/kg (unchanged from October 2020 and 9% down from November 2019). In November 2020, first-sales volume decreased in both Belgium and the Netherlands, by 19% and 12% respectively, and increased by 8% in Denmark, relative to the previous year. Over the 36-month period, prices decreased in all three markets, most notably in the Netherlands. During the same period, supply fell in Belgium and the Netherlands, and remained stable in Denmark. European plaice fisheries are seasonal, with different peaks for each of the three countries: December–January in Belgium, June–August in Denmark, and May–June in the Netherlands.

Figure 17. **FIRST-SALES PRICES OF ROCK LOBSTER AND SEA CRAWFISH IN FRANCE, ITALY, AND SPAIN**

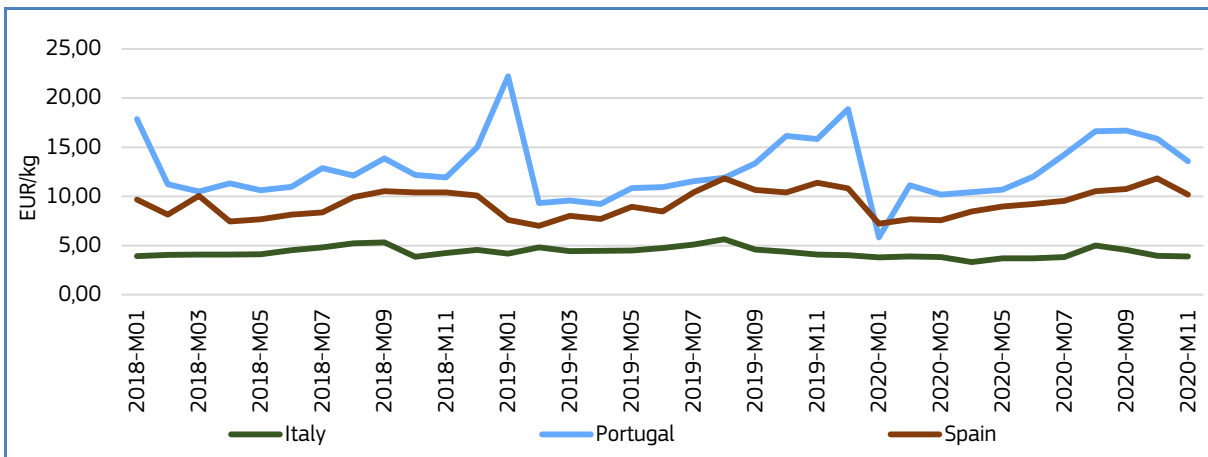


EU first sales of **rock lobster** and **sea crawfish** occur in multiple countries, including **France**, **Italy**, and **Spain**. In November 2020, the average first-sales prices of rock lobster and sea crawfish were: 39,67 EUR/kg in France (up from both the previous month and year by 24% and 146%, respectively); 40,01 EUR/kg in Italy (unchanged from October 2020, and down by 3% from November 2019); and 17,20 EUR/kg in Spain (12% lower than October 2020, and 5% lower than November 2019). In November 2020, supply increased in France (+27%) and Spain (+61%) and decreased in Italy (-13%) relative to November 2019. Over the past 36 months, both prices and supply of rock lobster and sea crawfish have increased in all three countries. First-sales volume is highly seasonal, with similar peaks (July–August) seen in all three countries.

⁶ First sales data updated on 16.01.2021.



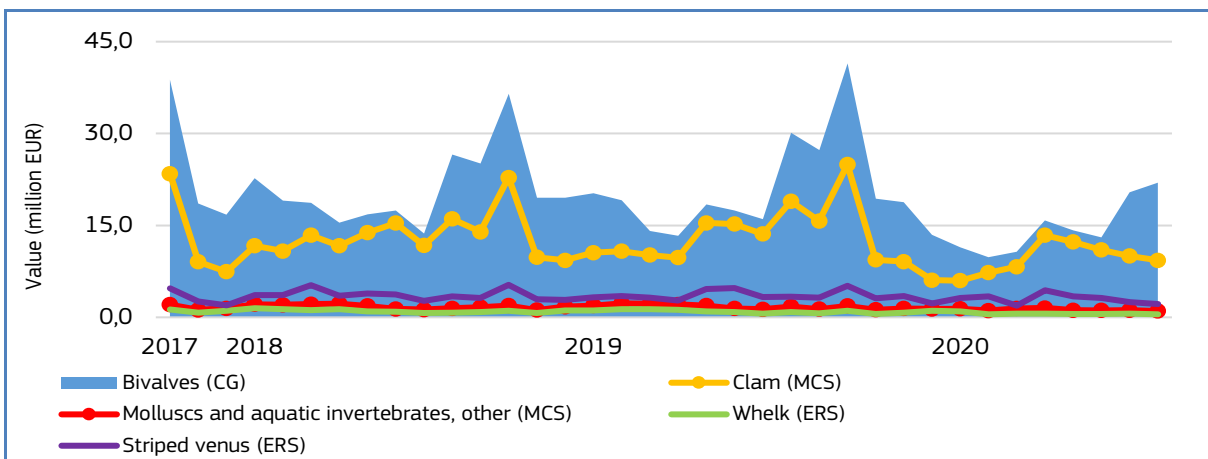
Figure 18. **FIRST-SALES PRICES OF DEEP-WATER ROSE SHRIMP IN ITALY, PORTUGAL, AND SPAIN**



EU first sales of **deep-water rose shrimp** occur predominantly in **Spain**, as well as in **Italy**, and **Portugal**. In November 2020, the average first-sales prices of deep-water rose shrimp were: 3,88 EUR/kg in Italy (down from both the previous month and year by 2% and 5%, respectively); 13,58 EUR/kg in Portugal (14% lower than both October 2020 and November 2019); 10,19 EUR/kg in Spain (down by 14% from October 2020 and down by 11% from November 2019). In November 2020, supply increased in all three countries compared to November 2019: in Italy by 15%, Portugal by 17%, and Spain by 47%. Over the past 36-month period, prices increased slightly in Spain and Portugal, and decreased moderately in Italy. Over the past three years, supply increased in Portugal and Spain, and decreased in Italy. Supply is seasonal, with similar peaks across the three countries between April and August.

1.5. Commodity group of the month: Bivalves and other molluscs and aquatic invertebrates⁷

Figure 19. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES⁸, DECEMBER 2017 - NOVEMBER 2020**



The **“Bivalves and other molluscs and aquatic invertebrates⁹”** commodity group (CG¹⁰) recorded the seventh-highest first-sales value and fourth-highest volume out of the 10 CGs recorded in November 2020¹¹. First sales reached a value of EUR 22 million and a volume of 9.328 tonnes, representing decreases of 20% and 17%, respectively, from November 2019. In the past 36 months, the highest first-sales value of bivalves was registered at EUR 41,4 million (November 2019).

⁷ First sales data updated on 16.1.2021.

⁸ Norway and the UK excluded from the analyses.

⁹ In the further text bivalves refers to “Bivalves and other molluscs and aquatic invertebrates”

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

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



The bivalves and other molluscs and aquatic invertebrates commodity group includes 10 main commercial species (MCS): abalone, clam, jellyfish, mussel *Mytilus* spp., other mussel, oyster, scallop, sea cucumber, sea urchin, other molluscs and other invertebrates¹².

At Electronic Recording and Reporting System (ERS) level, striped venus (10%) and whelk (2%) together accounted for 12% of bivalves total first-sales value recorded in November 2020.

1.6. Focus on striped venus



Striped venus (*Chamelea gallina*) is a species of small saltwater clam, a marine bivalve in the family Veneridae, the venus clams. Striped venus can be found on Eastern Atlantic coasts, from Norway and the British Isles, to Portugal, Morocco, Madeira, and the Canary Islands. It is also found in the Mediterranean Sea and the Black Sea and is abundant in the Adriatic Sea. This species is found buried in sand and muddy sand from the lower shore to depths of approximately 55 m¹³.

Despite a relatively low production in Europe, clams are a high-value seafood product, economically important in many European countries, particularly in Spain, Italy, and Portugal. It is caught with dredges, occasionally with bottom trawls. The hydraulically dredged striped venus fishery in the Adriatic is of paramount importance, mainly for Italy. In Croatia, striped venus is present at the Neretva estuary, although fishing activity for this fishery is practically negligible and most catches are harvested manually¹⁴.

The European Union regulates the exploitation of clams in the Mediterranean Sea through Council Regulation (EC) No 1967/2006¹⁵, which sets a minimum size of 25 mm for exploitation of mollusc bivalves. Italy, however, has benefitted from a four-year derogation deriving from the Landing Obligation (Articles 15 and 18.3 of EU Reg. 1380/2013¹⁶), decreed with EU Delegated Reg. 2020/2237¹⁷ which led to the minimum conservation reference size being set at 22 mm. This derogation lasted until 31 December 2020.

The species is sold commercially fresh, frozen, and canned, and is usually eaten steamed.

Selected countries

Table 18. **COMPARISON OF STRIPED VENUS FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF BIVALES IN ITALY AND SPAIN**

Striped venus		Changes in striped venus first sales Jan-Nov 2020 (%)		Contribution of striped venus to total bivalves first sales in November 2020 (%)	Principal places of sale Jan-Nov 2020 in terms of first-sales value
		Compared to Jan-Nov 2019	Compared to Jan-Nov 2018		
Italy	Value	-18%	-28%	65%	Giulianova, Fano, Ancona.
	Volume	-19%	-19%	71%	
Spain	Value	+13%	+326%	11%	Punta Umbría, Sanlúcar de Barrameda, Isla Cristina.
	Volume	+6%	+470%	18%	

¹² EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

¹³ <https://www.marlin.ac.uk/species/detail/2000>

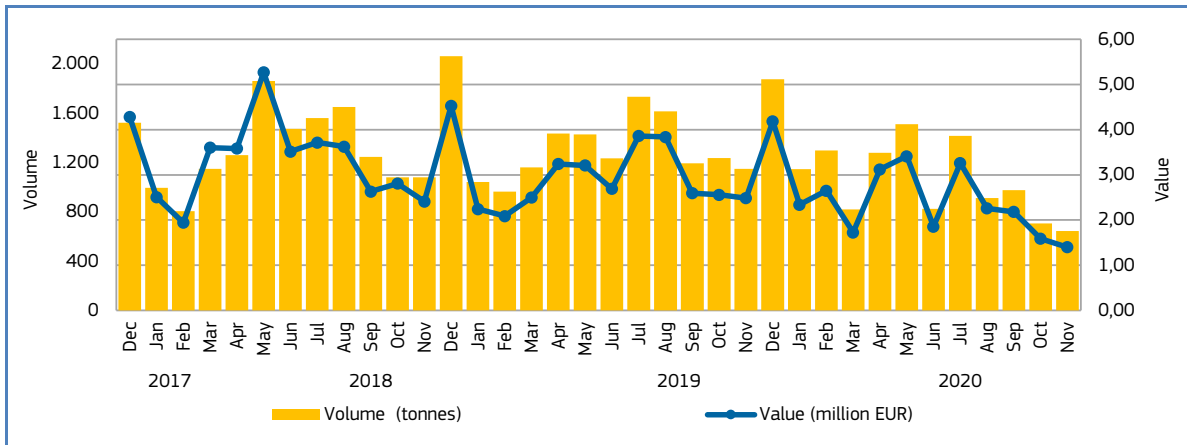
¹⁴ [https://www.europarl.europa.eu/RegData/etudes/STUD/2016/573412/IPOL_STU\(2016\)573412_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2016/573412/IPOL_STU(2016)573412_EN.pdf)

¹⁵ Regulation (EC) No 1967/2006 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02006R1967-20190814>

¹⁶ Regulation (EU) No 1380/2013 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:32013R1380>

¹⁷ Commission Delegated Regulation (EU) 2020/2237 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32020R2237>

Figure 20. **STRIPED VENUS: FIRST SALES IN ITALY, DECEMBER 2017 - NOVEMBER 2020**



Over the past 36 months, the highest first sales of striped venus in **Italy** occurred from May to August and in December. This trend could be linked with the tourist season in later spring/summer and Christmas holidays in December, when consumption of fisheries products is traditionally higher.

Figure 21. **FIRST SALES: COMPOSITION OF “BIVALVES” (ERS LEVEL) IN ITALY IN VALUE AND VOLUME, NOVEMBER 2020**

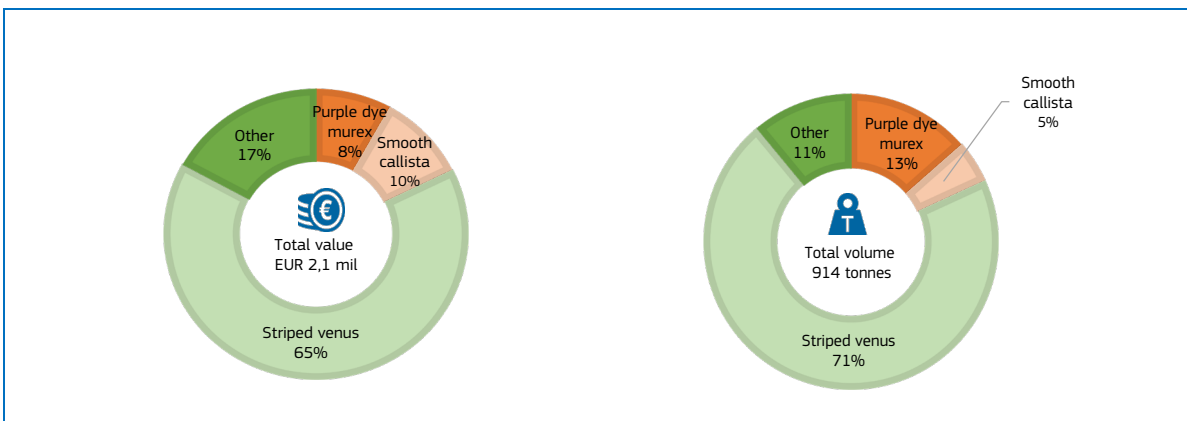
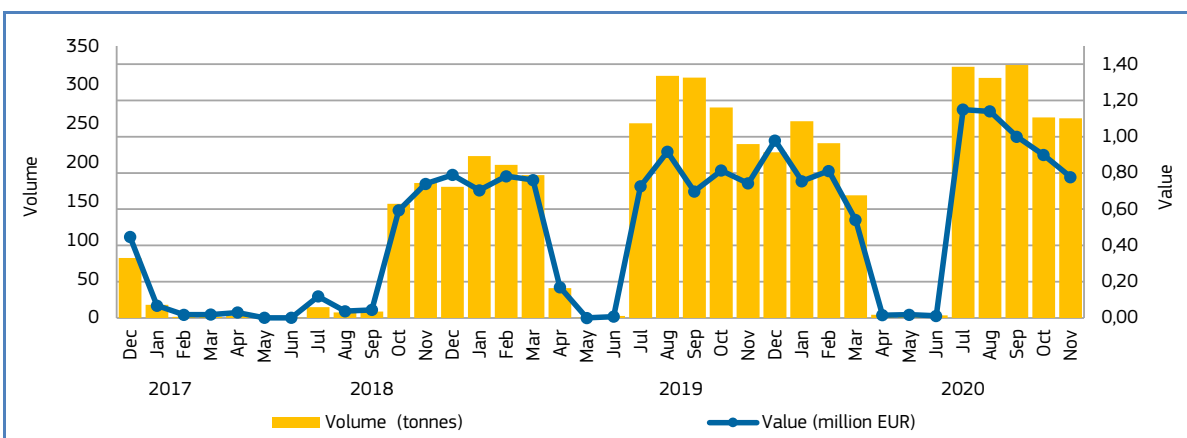


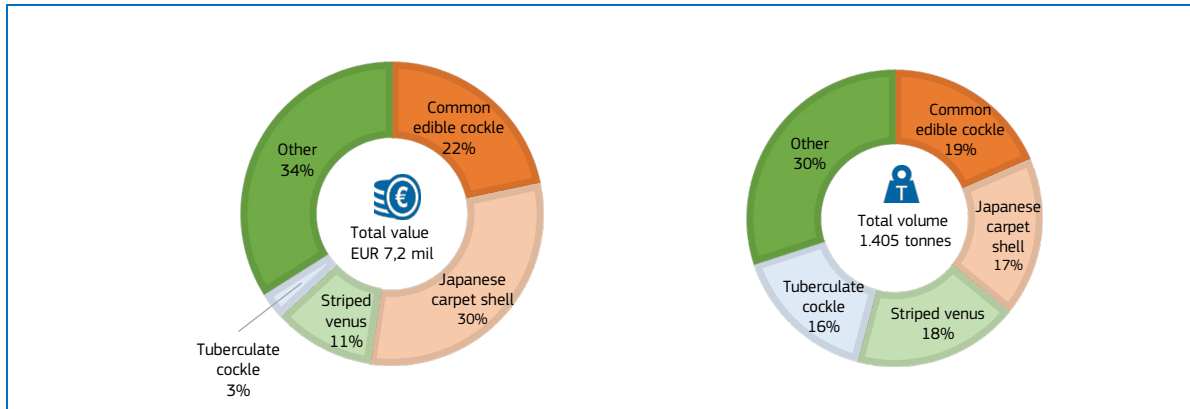
Figure 22. **STRIPED VENUS: FIRST SALES IN SPAIN, DECEMBER 2017 - NOVEMBER 2020**





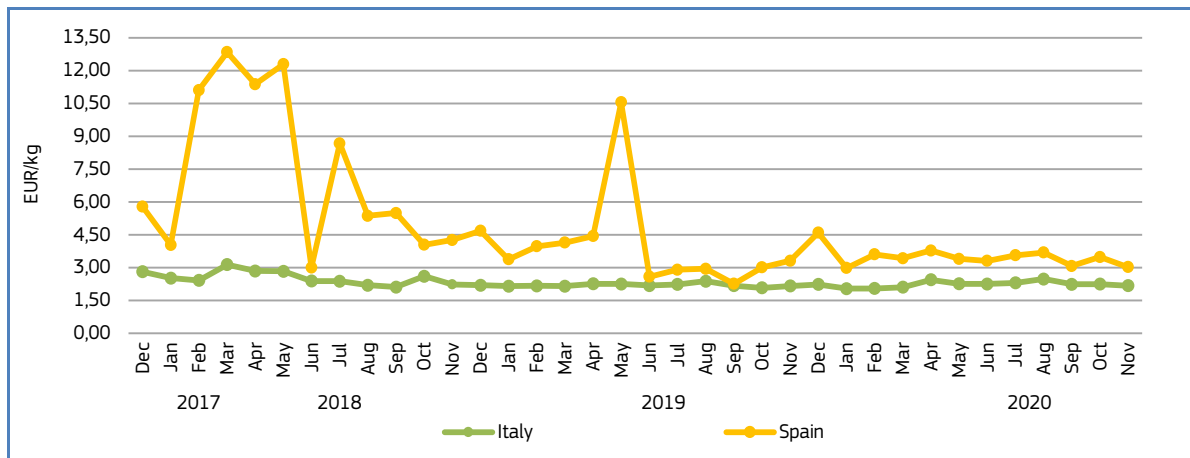
Over the past 36 months in **Spain**, the highest first sales of common striped venus occurred from July to September 2019 and 2020, peaking in September 2020 when 326 tonnes were sold. There were low or no first sales recorded in May and June, which is the closure period when the main spawning occurs¹⁸.

Figure 23. **FIRST SALES: COMPOSITION OF “BIVALVES” (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, NOVEMBER 2020**



Price trend

Figure 24. **STRIPED VENUS: FIRST-SALES PRICES IN SELECTED COUNTRIES, DECEMBER 2017 - NOVEMBER 2020**



Over the 36-month observation period (December 2017 to November 2020), the average first-sales price of striped venus in **Spain** was 4,95 EUR/kg, which was 113% higher than in **Italy** (2,32 EUR/kg). Such high difference in the first-sales price is significantly lower volume of the species sold in Spain (the highest volume was 326 tonnes in September 2020) compared to Italy (highest volume was 2062 tonnes in December 2020).

In **Italy** in November 2020, the average first-sales price of striped venus (2,17 EUR/kg) remained stable compared with November 2019 and slightly fell by 3% compared with November 2018. During the past 36 months, average price ranged from 2,04 EUR/kg for 1145 tonnes and 1297 tonnes in January and February 2020, respectively, to 3,14 EUR/kg for 1.148 tonnes in March 2018. In **Spain** in November 2020, the average first-sales price of striped venus (3,02 EUR/kg) decreased by 9% compared to November 2019 and by 29% relative to November 2018. During the observed period, the lowest average price (2,26 EUR/kg for 309 tonnes) was seen in September 2019, while the highest average price was recorded in March 2018 at 12,84 EUR/kg, for 1 tonne.

¹⁸ http://rua.ua.es/dspace/bitstream/10045/78071/1/TFM_Juan_Francisco_Lechuga_Sanchez_Final.pdf

1.7. Focus on whelk



Buccinum undatum, the whelk or the waved buccinum, is a large, edible marine gastropod in the family Buccinidae, the "true whelks". The species is a familiar part of the marine fauna of the Northern Atlantic and is found on the shores of the United Kingdom, Ireland, France, Norway, Iceland, various other northwest European countries, some Arctic islands, and North America as far south as New Jersey. They prefer colder temperatures, and cannot survive at temperatures above 29 °C. It can be found on muddy sand, gravel and rock habitat up to a depth of 1.200 m and is also sometimes present in brackish waters¹⁹. This whelk feeds on live bivalves and are, in turn, preyed upon by several fish species and crustaceans. The maximum height of the shell is 10 cm, and the maximum width is 6 cm.

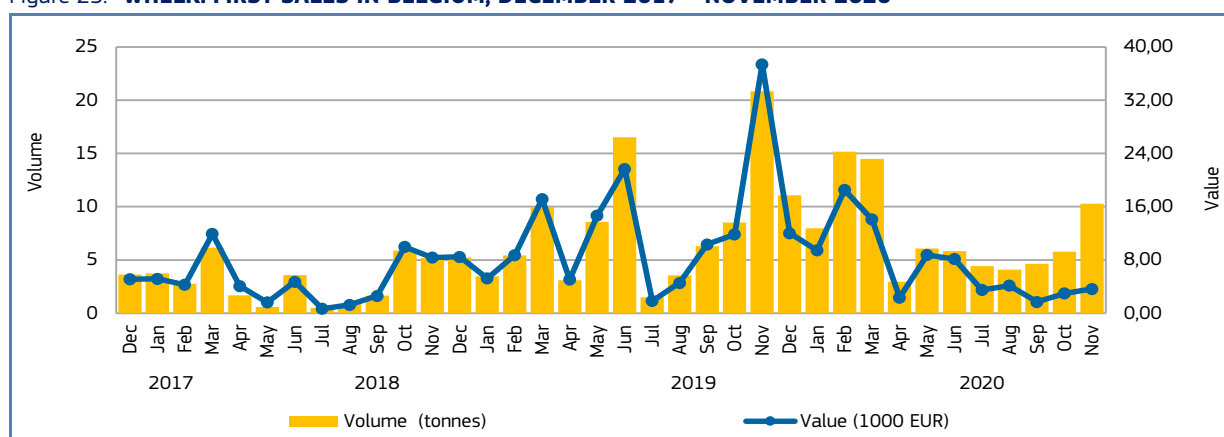
A whelk fishery exists on many shores around the world. This fishery uses traps covered with nylon or wire netting submerged on the seafloor to catch whelk. Traps are attached to lines and marked by floats on the surface²⁰. The trap attract whelk using various bait.

Selected countries

Table 19. **COMPARISON OF WHELK FIRST-SALES PRICES, MAIN PLACES OF SALE AND CONTRIBUTION TO OVERALL SALES OF BIVALVES IN BELGIUM, FRANCE, AND THE NETHERLANDS**

Whelk		Changes in whelk first sales Jan-Nov 2020 (%)		Contribution of whelk to total bivalve first sales in November 2020 (%)	Principal places of sales in Jan-Nov 2020 in terms of first-sales value
		Compared to Jan-Nov 2019	Compared to Jan-Nov 2018		
Belgium	Value	-44%	+41%	6%	Nieuwpoort, Oostende, Zeebrugge.
	Volume	-7%	+151%	27%	
France	Value	-31%	-35%	4%	Dieppe, Erquy, St Malo.
	Volume	-25%	-32%	7%	
Netherlands	Value	-66%	-53%	53%	Vlissingen, Scheveningen, Stellendam.
	Volume	-29%	-7%	89%	

Figure 25. **WHELK: FIRST SALES IN BELGIUM, DECEMBER 2017 - NOVEMBER 2020**



¹⁹ <https://web.archive.org/web/20070822170400/http://www.marlin.ac.uk/species/Buccinumundatum.htm>

²⁰ <https://thisfish.info/fishery/species/whelk/>

Bivalves landed in **Belgium** are taken as a by-catch of fisheries targeting finfish or crustaceans, and the nation has never had specialised molluscan fisheries. Species landed consist mainly of whelk, with first sales fluctuating throughout the year²¹. The peak in first sales was reached in November 2019 when 21 tonnes were sold.

Figure 26. **FIRST SALES: COMPOSITION OF “BIVALVES” (ERS LEVEL) IN BELGIUM IN VALUE AND VOLUME, NOVEMBER 2020**

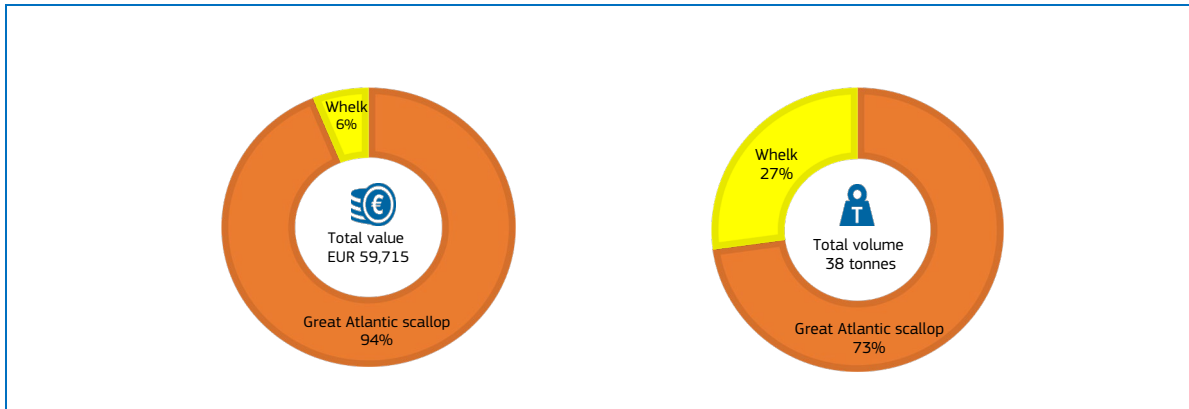
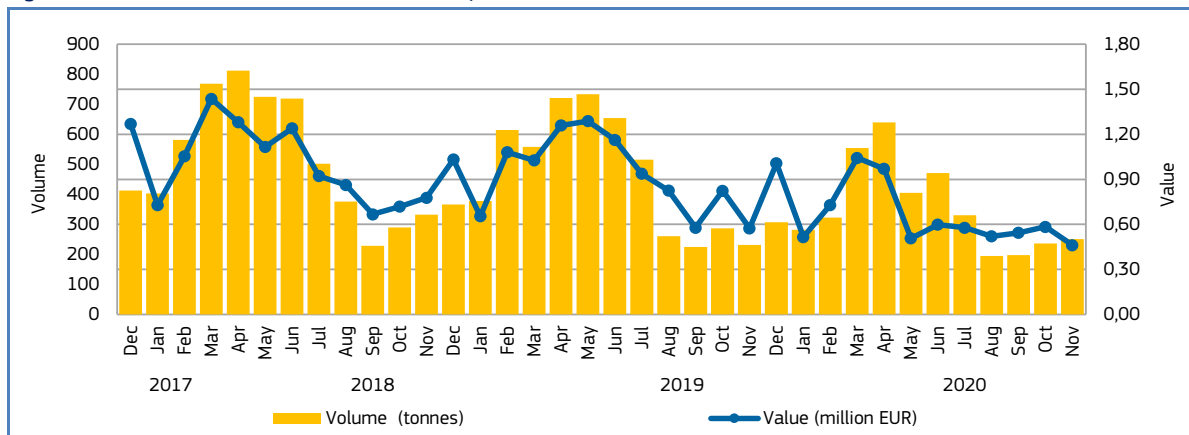


Figure 27. **WHELK: FIRST SALES IN FRANCE, DECEMBER 2017 - NOVEMBER 2020**



In **France**, over the past 36 months (December 2017 – November 2020) the whelk fishery fluctuated regularly, with the highest first sales registered during warmer months, namely from April to June every year. The peak in first sales was recorded in April 2018, when 812 tonnes were sold.

²¹ <http://www.vliz.be/imisdocs/publications/267114.pdf>

Figure 28. **FIRST SALES: COMPOSITION OF “BIVALVES” (ERS LEVEL) IN FRANCE IN VALUE AND VOLUME, NOVEMBER 2020**

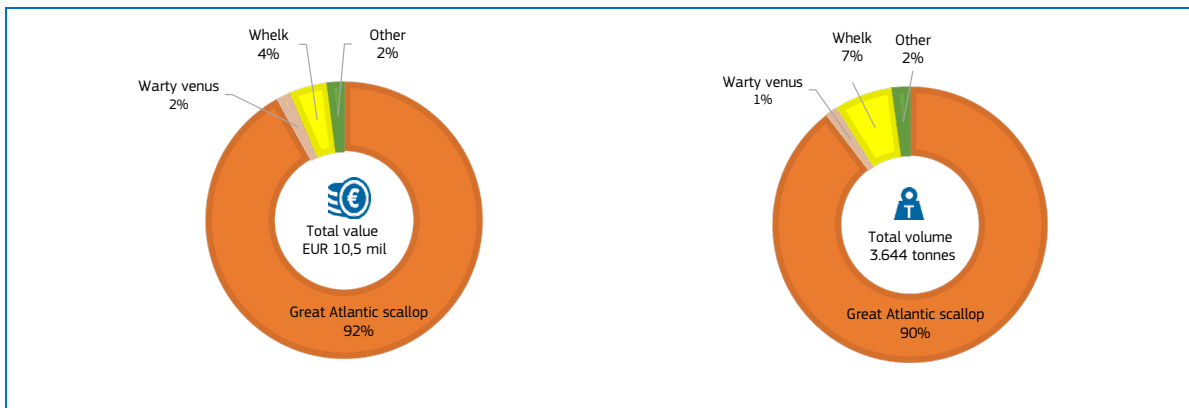
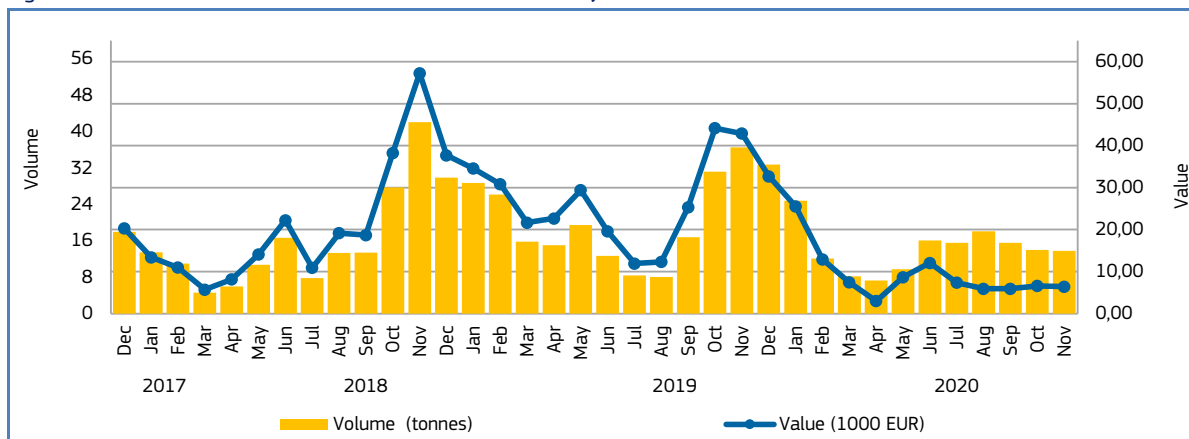
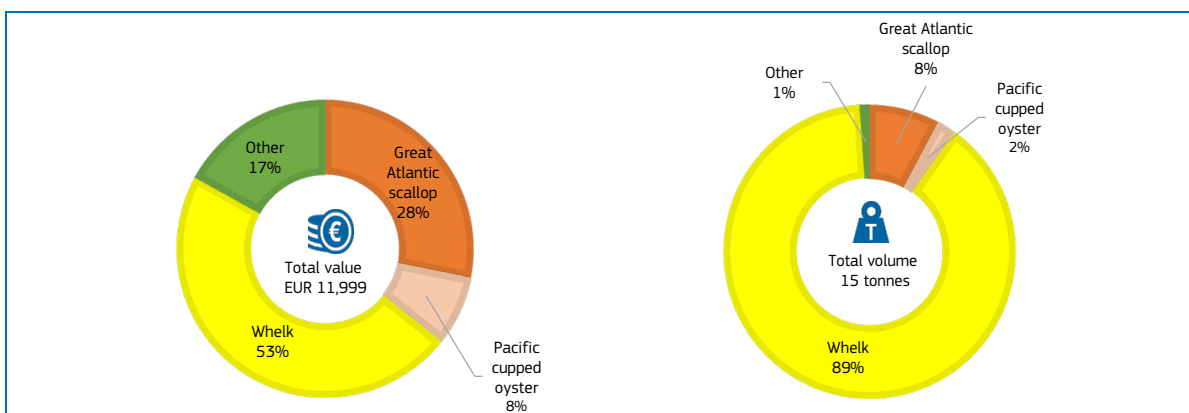


Figure 29. **WHELK: FIRST SALES IN THE NETHERLANDS, DECEMBER 2017 - NOVEMBER 2020**



In the Netherlands, over the past 36 months (December 2017 – November 2020) the whelk fishery fluctuated regularly, with the highest first sales registered during colder months. The highest first sales were recorded in November 2018 and 2019 when 42 and 37 tonnes, respectively, were sold.

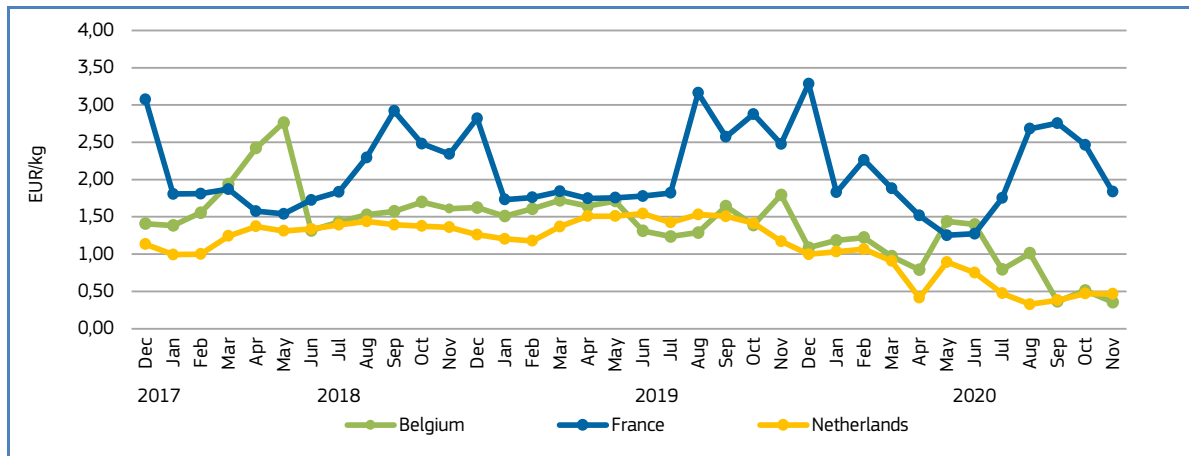
Figure 30. **FIRST SALES: COMPOSITION OF “BIVALVES” (ERS LEVEL) IN THE NETHERLANDS IN VALUE AND VOLUME, NOVEMBER 2020**





Price trend

Figure 31. **WHELK: FIRST-SALES PRICES IN SELECTED COUNTRIES, DECEMBER 2017 - NOVEMBER 2020**



Over the 36-month observation period (November 2017 – November 2020), the average first-sales price of whelk in **France** was 2,12 EUR/kg, 52% higher than in **Belgium** (1,40 EUR/kg), and 47% over that in the Netherlands (1,12 EUR/kg).

In **Belgium** in November 2020, the average first-sales price of whelk (0,35 EUR/kg) decreased by 80% compared to November 2019 and 78% compared to November 2018. The lowest average price was registered in November 2020 at 0,35 EUR/kg for 10 tonnes, which was among the highest volumes recorded in the observed 36 months. The highest average price at 2,76 EUR/kg for 1 tonne was registered in May 2018.

In **France**, in November 2020 the average first-sales price of whelk was 1,84 EUR/kg, 26% and 22% lower than in November 2019 and 2018, respectively. The lowest price in the past 36 months was registered in May 2020, at 1,25 EUR/kg for 405 tonnes. The highest price (3,29 EUR/kg for 307 tonnes) was observed in December 2019.

In **the Netherlands** in November 2020, the average first-sales price of whelk (0,47 EUR/kg) decreased by 60% compared to November 2019 and 66% compared to November 2018. The lowest average price was registered in August 2020 at 0,33 EUR/kg for 18 tonnes. The highest average price at 1,54 EUR/kg for 13 tonnes was registered in June 2019.

2. Extra-EU imports

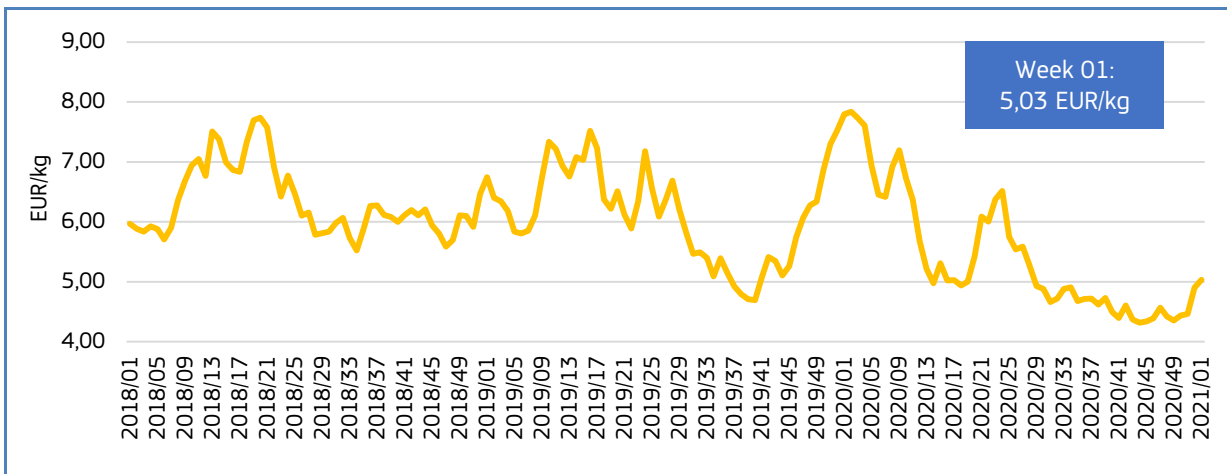
Every month, the weekly extra-EU import prices (average values per week, in EUR per kg) are examined for nine different species. The three most relevant species in terms of value and volume remain consistent, and are examined every month: fresh whole Atlantic salmon from Norway, frozen Alaska pollock 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 bivalves. The featured commodity species this month are: prepared or preserved mussels from Chile, frozen scallops (including queen scallops) from the United States, and fresh or chilled mussels from Norway. The remaining three species examined each month are randomly selected and, this month, include prepared or preserved shrimps and prawns from Greenland, albacore or longfin tunas (for industrial manufacture of products) from South Africa, and smoked Pacific salmon, Atlantic salmon, and Danube salmon from Norway.

Table 20. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THE THREE MOST RELEVANT FISHERIES AND AQUACULTURE PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 01/2021	Preceding 4-week average	Week 01/2020	Notes
Fresh whole Atlantic salmon imported from Norway (<i>Salmo salar</i> , CN code 03021440)	Price (EUR/kg)	5,03	4,54 (+11%)	7,79 (-35%)	Lower prices in December 2020 than the same month in previous years. Downward trend in 2020. In week 01/2021, price rose above 5,00 EUR/kg for the first time since week 29/2020.
	Volume (tonnes)	10.214	16.405 (-38%)	8.698 (+17%)	Higher volumes in December 2020 than the same month in previous years. Upward trend in 2020. Supply up in week 01/2021, compared with previous week.
Frozen Alaska pollock fillets imported from China (<i>Theragra chalcogramma</i> , CN code 03047500)	Price (EUR/kg)	2,43	2,46 (-1%)	2,96 (-18%)	December 2020 prices were lower than the same month in 2019 but higher than December 2018. The upward trend observed in 2020 continued in week 01/2021.
	Volume (tonnes)	3.477	2.443 (+42%)	6.136 (-43%)	Fluctuations in supply. Lower volumes in December 2020 than the same month in 2019, but unchanged from December 2018. Supply increased remarkably in the first week of 2021.
Frozen tropical shrimp imported from Ecuador (genus <i>Penaeus</i> spp., CN code 03061792)	Price (EUR/kg)	5,26	5,17 (+2%)	6,26 (-16%)	Downward trend in 2020. Average price in December 2020 distinctively lower than December 2018 and 2019. Price up in week 1 of 2021 compared with week 52 of 2020.
	Volume (tonnes)	1.369	2.013 (-32%)	1.985 (-31%)	Fluctuations in supply. Upward trend in 2020. Volumes in December 2020 higher compared with the same month in 2018 and 2019. Supply decreased in the first week of 2021 compared with last week of 2020.

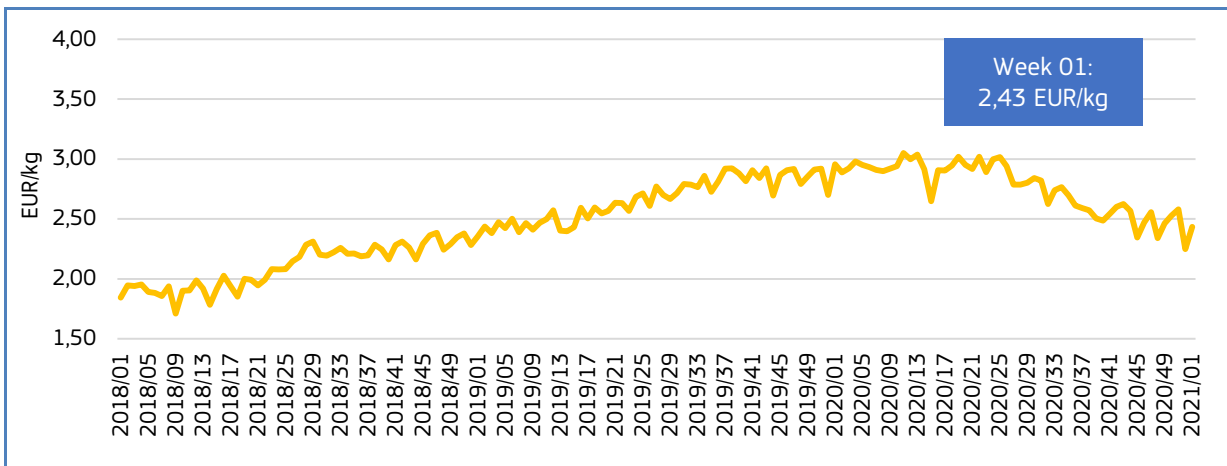
Source: European Commission (updated 18.01.2021).

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



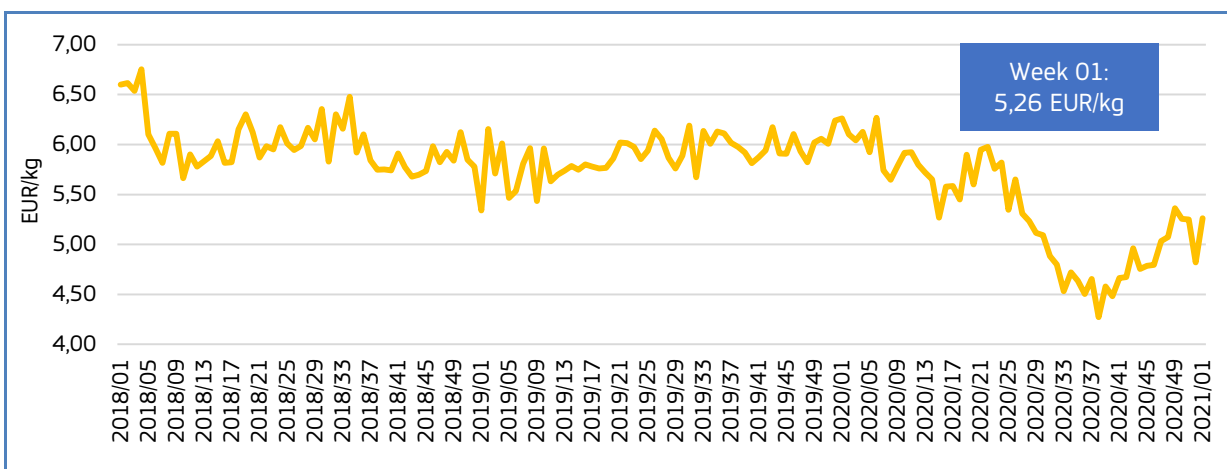
Source: European Commission (updated 18.01.2021).

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



Source: European Commission (updated 18.01.2021).

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



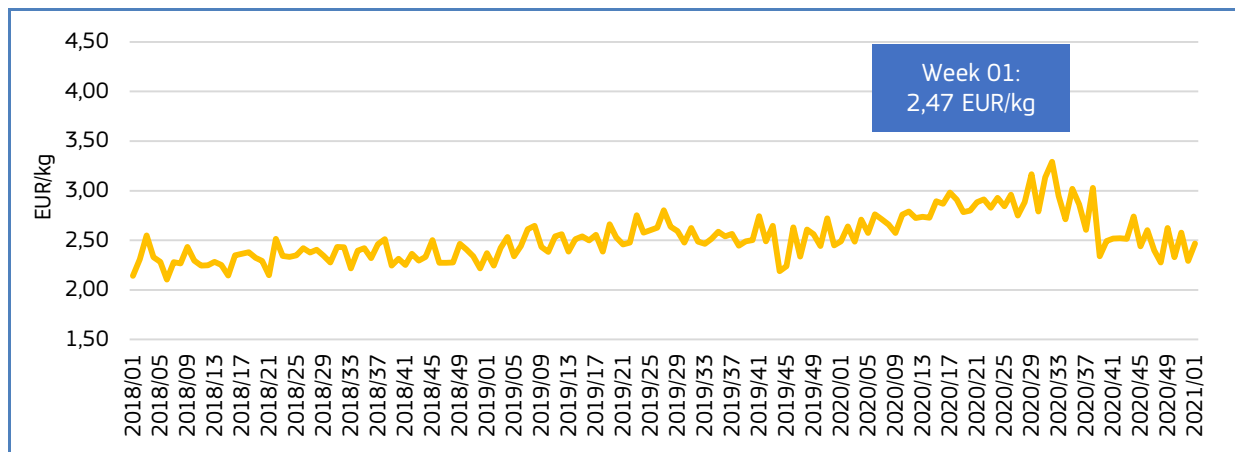
Source: European Commission (updated 18.01.2021).

Table 21. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 01/2021	Preceding 4-week average	Week 01/2020	Notes
Prepared or preserved mussels from Chile (CN code 16055390)	Price (EUR/kg)	2,47	2,46 (+1%)	2,49 (-1%)	Upward trend from 2018 to 2020. Price spike (3,29 EUR/kg) correlates with significant drop of supply.
	Volume (tonnes)	225	245 (-8%)	344 (-35%)	Supply is consistent, with volume mostly ranging from 300 to 700 tonnes. Volume exceeds 1.000 tonnes in the summer months (June–August). Slight downward trend from 2018 to 2020.
Frozen scallops (including queen scallops) from the US (CN code 03072290)	Price (EUR/kg)	16,19	14,37 (+13%)	14,92 (+9%)	Slight upward trend from 2018 to 2020. Price spikes (over 20 EUR/kg) do not always correlate with drop of supply.
	Volume (tonnes)	1	3 (-60%)	14 (-92%)	High fluctuations in supply, from 0,01 to 176 tonnes. Downward trend from 2018 to 2020.
Live, fresh, or chilled mussels from Norway (<i>Mytilus</i> spp., CN code 03073110)	Price (EUR/kg)	3,80	3,48 (+9%)	4,34 (-12%)	Slight downward trend from 2018 to 2020. Price spikes do not correlate with drop of supply.
	Volume (tonnes)	0,13	0,43 (-69%)	0,39 (-66%)	Fluctuations in supply, from 36 kg to 1,05 tonnes. Downward trend from 2018 to 2020.

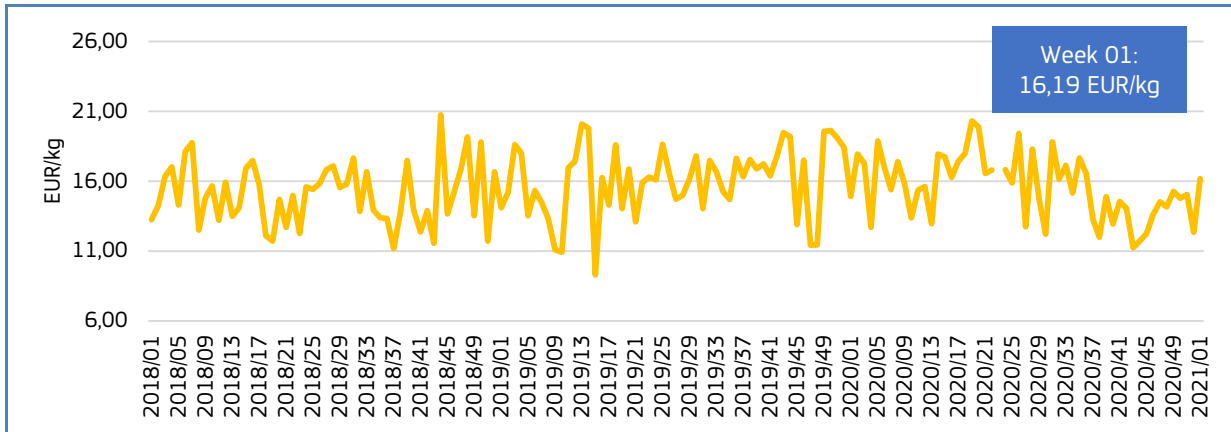
Source: European Commission (updated 18.01.2021).

Figure 35. **IMPORT PRICE OF PREPARED OR PRESERVED MUSSELS FROM CHILE**



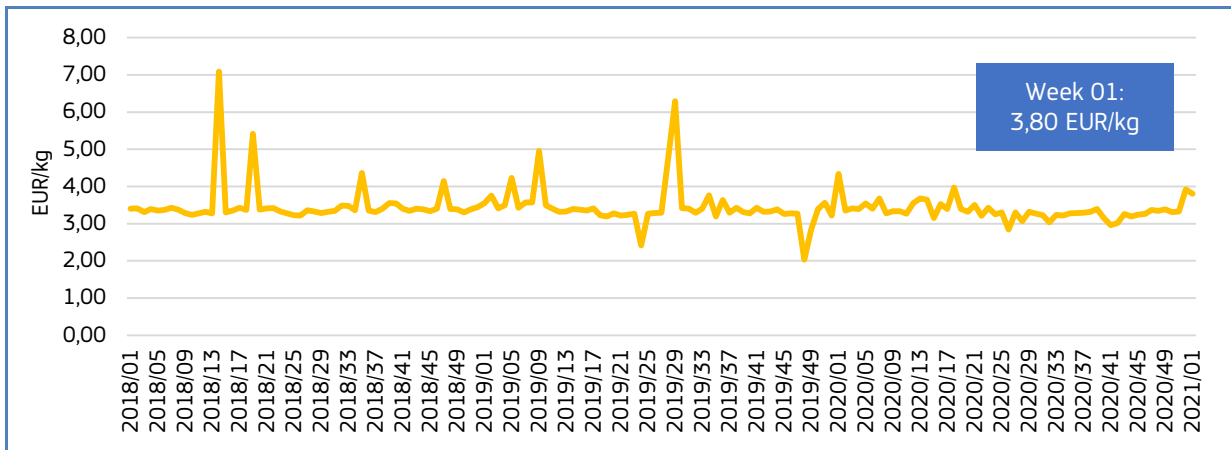
Source: European Commission (updated 18.01.2021).

Figure 36. **IMPORT PRICE OF FROZEN SCALLOPS (INCLUDING QUEEN SCALLOPS) FROM THE US**



Source: European Commission (updated 18.01.2021).

Figure 37. **IMPORT PRICE OF LIVE, FRESH, OR CHILLED MUSSELS FROM NORWAY**



Source: European Commission (updated 18.01.2021).

In 2020, the price of prepared or preserved mussels from Chile increased continuously, while volume exhibited a slight downward trend.

Both price and volume of frozen scallops (including queen scallops) from the US showed a downward trend in 2020. Over the past three years, price fluctuated from 9,31 to 20,76 EUR/kg.

In 2018–2020, the price of live, fresh, or chilled mussels from Norway fluctuated from 2,04 to 7,09 EUR/kg. In 2020 both price and volume exhibited a downward trend (the latter most notably).

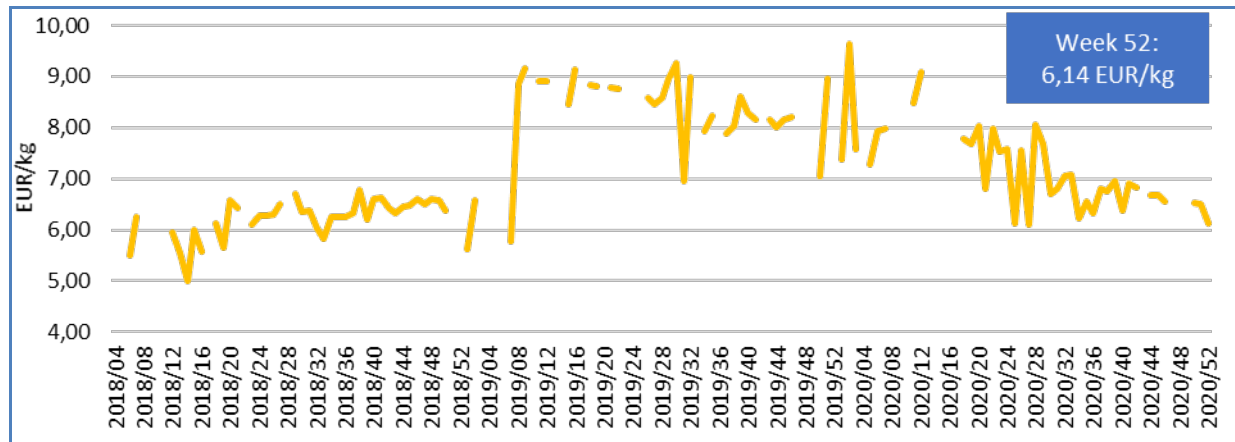
Table 22. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF EU IMPORTS OF OTHER THREE FISHERIES AND AQUACULTURE PRODUCTS RELEVANT TO THE EU MARKET**

Extra-EU Imports		Week 01/2021	Preceding 4-week average	Week 01/2020	Notes
Prepared or preserved shrimps and prawns from Greenland (CN code 16052900)	Price (EUR/kg)	6,14*	6,47** (-5%)	n/a***	Upward trend from 2018 to 2020. Most of the price spikes correlate with drops in supply.
	Volume (tonnes)	226*	698** (-68%)	n/a***	High fluctuations in supply, from 20 to 1.189 tonnes. Upward trend from 2018 to 2020.
Frozen albacore or longfin tunas for industrial manufacture of products from South Africa (<i>Thunnus alalunga</i> , CN code 03034110)	Price (EUR/kg)	2,91*	n/a	n/a***	Data is limited. Loose downward trend from 2018 to 2020. Most of the prices range from 2,91 to 4,30 EUR/kg.
	Volume (tonnes)	55*	n/a	n/a***	Data is limited. High fluctuations in supply, from 13 to 187 tonnes. Loose upward trend from 2018 to 2020.
Smoked Pacific salmon, Atlantic salmon, and Danube salmon from Norway (CN code 03054110)	Price (EUR/kg)	21,84	15,30 (+43%)	25,93 (-16%)	Upward trend from 2018 to 2020. Prices range from 7,20 to 25,93 EUR/kg.
	Volume (tonnes)	2	22 (-89%)	3 (-16%)	Volume exhibited a stable trend from 2018 to 2020, notwithstanding high fluctuations, from 0,5 to 46 tonnes.

Source: European Commission (updated 18.01.2021).

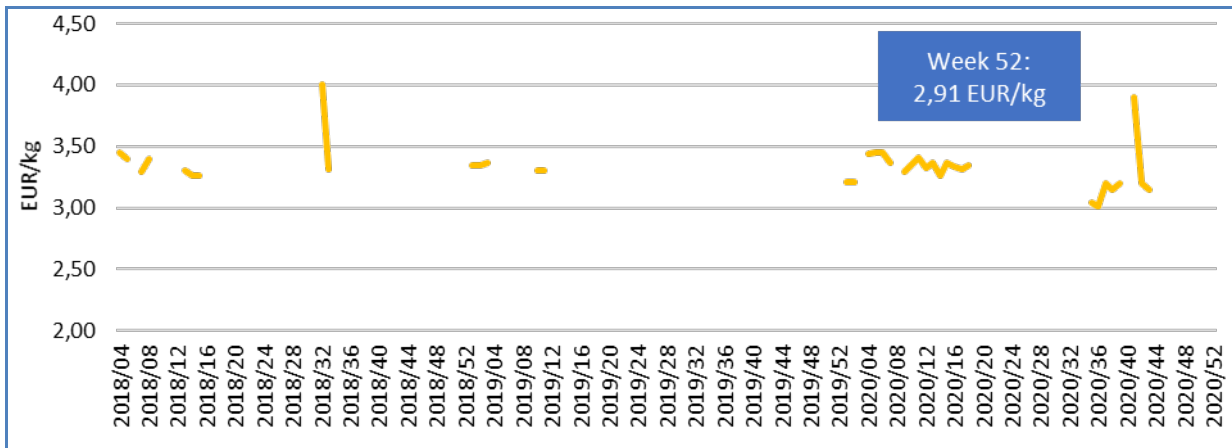
* Data refers to week 52 of 2020 (the most recent available); **average of weeks 48, 50, 51, and 52;*** data is not available for week 52/2020.

Figure 38. **IMPORT PRICE OF PREPARED OR PRESERVED SHRIMPS AND PRAWNS FROM GREENLAND**



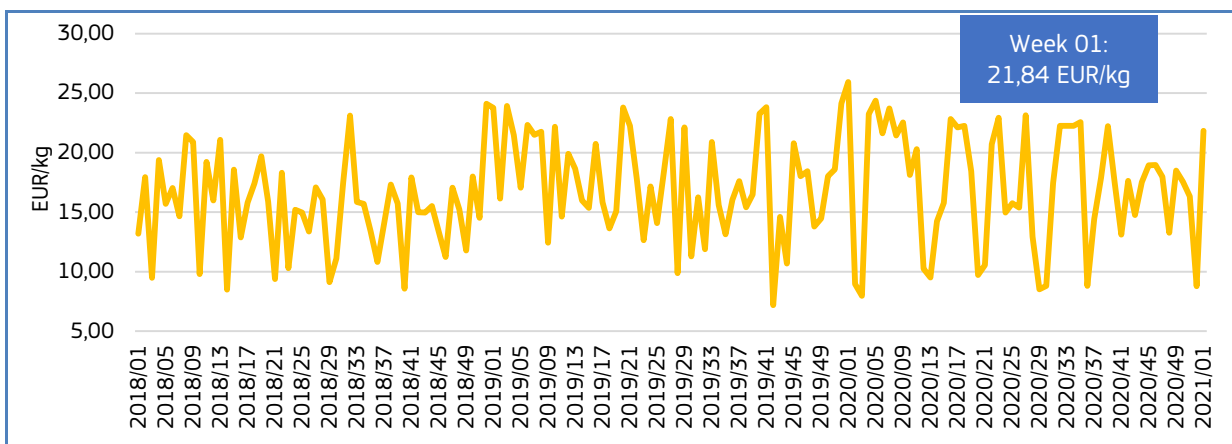
Source: European Commission (updated 18.01.2021).

Figure 39. **IMPORT PRICE OF FROZEN ALBACORE OR LONGFIN TUNAS FOR INDUSTRIAL MANUFACTURE OF PRODUCTS FROM SOUTH AFRICA**



Source: European Commission (updated 18.01.2021).

Figure 40. **IMPORT PRICE OF SMOKED PACIFIC SALMON, ATLANTIC SALMON, AND DANUBE SALMON FROM NORWAY**



Source: European Commission (updated 18.01.2021).

Since the beginning of 2020, both price and volume of prepared or preserved shrimps and prawns from Greenland have exhibited an upward trend.

In 2020, price of frozen albacore or longfin tunas for industrial manufacture of products from South Africa exhibited a downward trend. At the same time, supply increased.

The price of smoked Pacific salmon, Atlantic salmon, and Danube salmon from Norway exhibited an upward trend in 2020. At the same time, supply remained stable.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In November 2020 relative to November 2019, household consumption of fresh fisheries and aquaculture products increased in both volume and value in nearly all Member States analysed. The only exception was Italy, where volume and value experienced a slight decline (-1% and -5%, respectively) due to reduced consumption of mussel (*Mytilus* spp.) and European seabass (-15% and -29%, respectively).

European seabass together with gilthead seabream were the main species responsible for increased consumption in Portugal (+84% and +54%, respectively). The consumption increase registered in Germany was mainly to a rise in consumption of mussel (*Mytilus* spp.) (+75%) and salmon (+31%).

Table 23. **NOVEMBER 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	November 2018		November 2019		October 2020		November 2020		Change from November 2019 to November 2020	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	39,83	943	15,19	921	15,44	1.066	18,16	1.041	16,80	13%	9%
France	33,52	18.123	192,51	17.596	198,30	19.478	223,35	20.911	229,63	19%	16%
Germany	14,50	5.134	64,07	5.158	67,71	6.205	82,29	6.602	90,45	28%	34%
Hungary	6,12	376	2,44	333	1,63	392	2,02	417	2,54	25%	56%
Ireland	23,13	968	13,88	953	13,50	971	14,38	997	14,85	5%	10%
Italy	31,02	21.976	226,64	24.451	265,92	23.923	251,66	24.224	251,61	1%	5%
Netherlands	20,90	2.675	37,14	2.401	37,52	2.869	41,81	3.070	44,18	28%	18%
Poland	13,02	4.224	25,26	3.942	25,28	3.883	25,45	4.152	26,55	5%	5%
Portugal	60,92	5.105	33,30	5.083	34,07	6.299	42,17	6.796	47,37	34%	39%
Spain	46,01	51.665	397,70	50.471	409,12	59.006	472,61	57.453	458,51	14%	12%
Sweden	26,61	708	9,23	774	10,38	1.529	17,45	923	11,07	19%	7%

Source: EUMOFA, based on Europanel (updated 12.01.2021).

*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 average household consumption of fresh fisheries and aquaculture products in November has been below the annual average in both volume and value terms in most of the Member States analysed. Only in Germany and Spain, the average volume for November was above the yearly average household consumption. In Spain, value was also above the average, as well as in France, Poland, and Portugal.

The most recent weekly consumption data (up to 4 of 2021) are available on the EUMOFA website and can be accessed [here](#).

3.2. Fresh cod

Habitat: a cold-water fish with flaky white flesh found in coastal waters at depths of less than 200 m²².

Catch area: North Atlantic Ocean, North Sea, Baltic Sea.

Catching countries in the EU: Denmark, Sweden, Poland.

Production method: Caught.

Main consumers in the EU: Denmark, Sweden.

Presentation: Whole, fillets and other cuts, minced.

Preservation: Fresh, frozen, dried, salted.



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

France is among the EU Member States with a high per capita apparent consumption²³ of fisheries and aquaculture products. In 2018, the country's per capita apparent consumption increased slightly by 1% from 2017 and reached 33,52 kg in LWE. This was 38% higher than the EU average (24,36 kg LWE). However, French apparent consumption was 61% less than that of Malta²⁴, the Member State with the highest per capita apparent consumption (85,95 kg LWE) in 2018.

In the Netherlands, the per capita apparent consumption was 20,90 kg LWE in 2018, or 14% below the EU average in 2018. It was also 38% below the French per capita apparent consumption.

Germany registered the lowest per capita apparent consumption among the three analysed countries, or 14, 50 kg LWE. However, it increased 3% compared to 2017.

See more on per capita apparent consumption in the EU in Table 25.

Cod is among the top three most consumed products in the EU. In 2018, it registered per capita consumption of 2,14 kg LWE in the EU. It decreased by 17% compared to the previous year.

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

First Sales: Denmark 10/2018, 2/2017, 8/2015; France 2/2017; Latvia 5/2014; Lithuania 6/2016, 2/2015, 1/2014; Norway 4/2016; Sweden 10/2018, 2/2017, February 2013, November-December 2013; the UK 10/2018, 2/2017; 8/2017; Portugal 5/2020; Spain 5/2020.

Consumption: Belgium July 2013; Denmark 1/2019, 3/2016; France 4/2015, July 2013; Germany 3/2016; Ireland 1/2019, 3/2016; Lithuania 3/2016, 4/2015; Poland 4/2015; Portugal 4/2015; Sweden 1/2019, July 2013; the UK 3/2016, 4/2015, July 2013.

Extra-EU Imports: Iceland 10/2018; Norway 10/2020, 6/2019.

Topic of the month: Atlantic cod in the EU 6/2020, 3/2019; Cod in Lithuania July 2013.

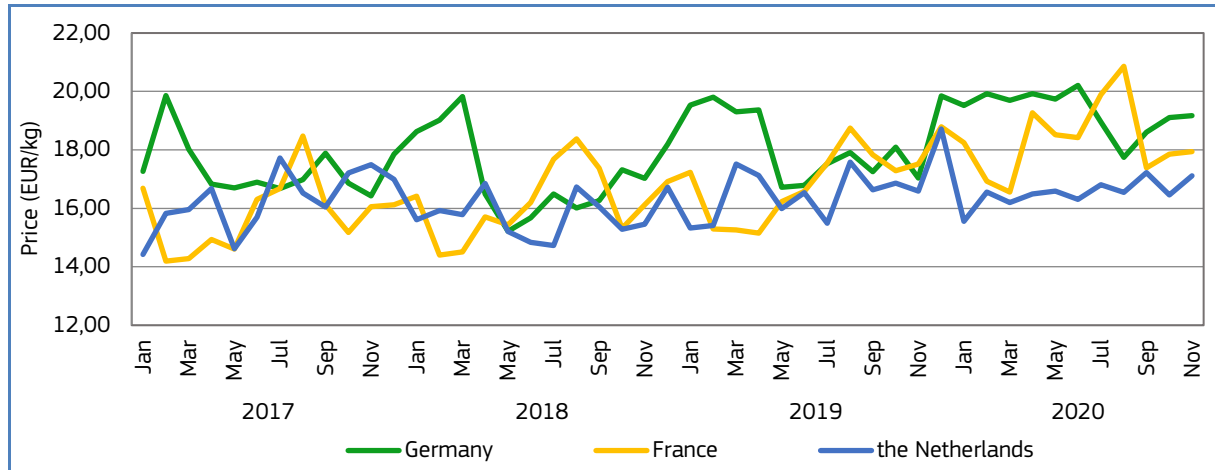
²² <https://www.eumofa.eu/documents/20178/138707/MH+1+2019+EN.pdf>

²³ "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.

²⁴ The high per capita apparent consumption in Malta could be due to higher consumption of fisheries and aquaculture products during the tourist season.

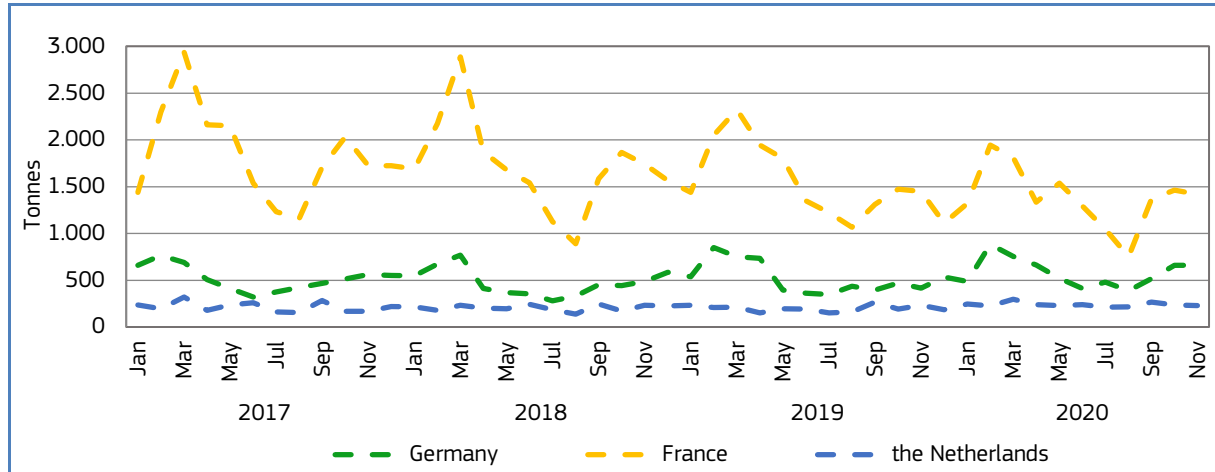
In 2020 (January–November 2020), total household consumption of fresh cod in France and the Netherlands experienced a seasonal increase in price reaching 18,35 EUR/kg and 16,53 EUR/kg, respectively, while in Germany it decreased and averaged at 19,33 EUR/kg for the period. However, German consumers spent the most for a kilogram of fresh cod.

Figure 41. PRICES OF FRESH COD PURCHASED BY GERMAN, FRENCH, AND DUTCH HOUSEHOLDS



Source: EUMOFA, based on Europanel (updated 12.01.2021).

Figure 42. HOUSEHOLD PURCHASES OF FRESH COD IN GERMANY, FRANCE AND THE NETHERLANDS



Source: EUMOFA based on Europanel (updated 12.01.2021).

3.2.2. Household consumption trends in Germany

Long-term trend (January 2017 to November 2020): Upward trend both in price and volume.

Yearly average price: 17,35 EUR/kg (2017), 17,18 EUR/kg (2018), 18,26 EUR/kg (2019).

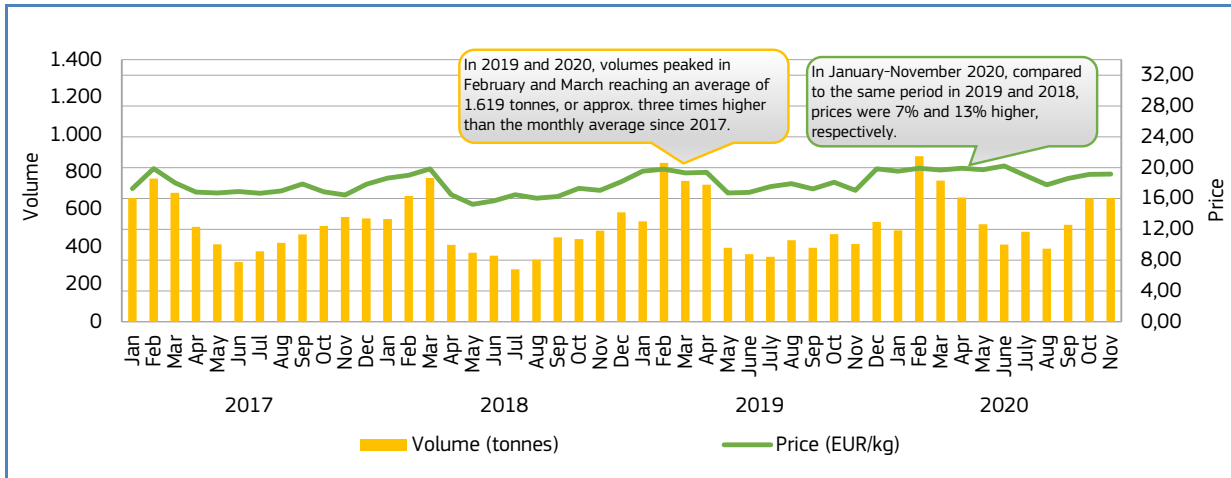
Yearly consumption: 6.241 tonnes (2017), 5.697 tonnes (2018), 6.219 tonnes (2019).

Short-term trend (January 2020 to November 2020): Seasonal decrease both in volume and price.

Average price: 19,33 EUR/kg.

Consumption: 6.432 tonnes.

Figure 43. **RETAIL PRICE AND VOLUME OF FRESH COD PURCHASED BY HOUSEHOLDS IN GERMANY, JANUARY 2017 – NOVEMBER 2020**



Source: EUMOFA, based on Europanel (updated 12.01.2021).

3.2.3. Household consumption trends in France

Long-term trend (January 2017 to November 2020): Upward trend in price and downward trend in volume.

Yearly average price: 15,80 EUR/kg (2017), 16,20 EUR/kg (2018), 16,95 EUR/kg (2019).

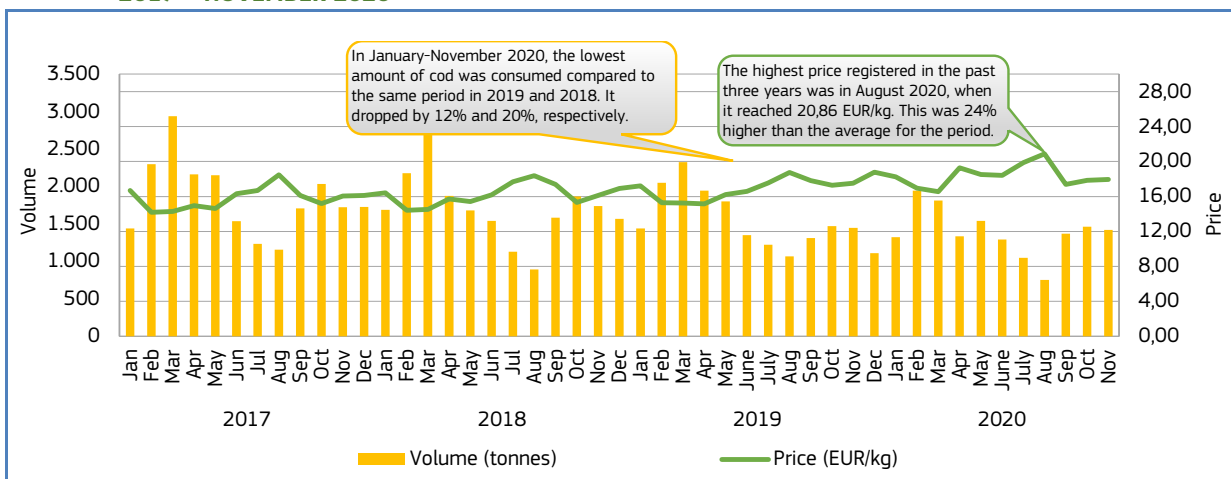
Yearly consumption: 22.103 tonnes (2017), 20.620 tonnes (2018), 18.535 tonnes (2019).

Short-term trend (January 2020 to November 2020): Seasonal decrease in volume and increase in price.

Average price: 18,35 EUR/kg.

Consumption: 15.297 tonnes.

Figure 44. **RETAIL PRICE AND VOLUME OF FRESH COD PURCHASED BY HOUSEHOLDS IN FRANCE, JANUARY 2017 – NOVEMBER 2020**



Source: EUMOFA, based on Europanel (updated 12.01.2021).

3.2.4. Household consumption trends in the Netherlands

Long-term trend (January 2017 to November 2020): Upward trend in both price and volume.

Yearly average price: 16,27 EUR/kg (2017), 15,77 EUR/kg (2018), 16,65 EUR/kg (2019).

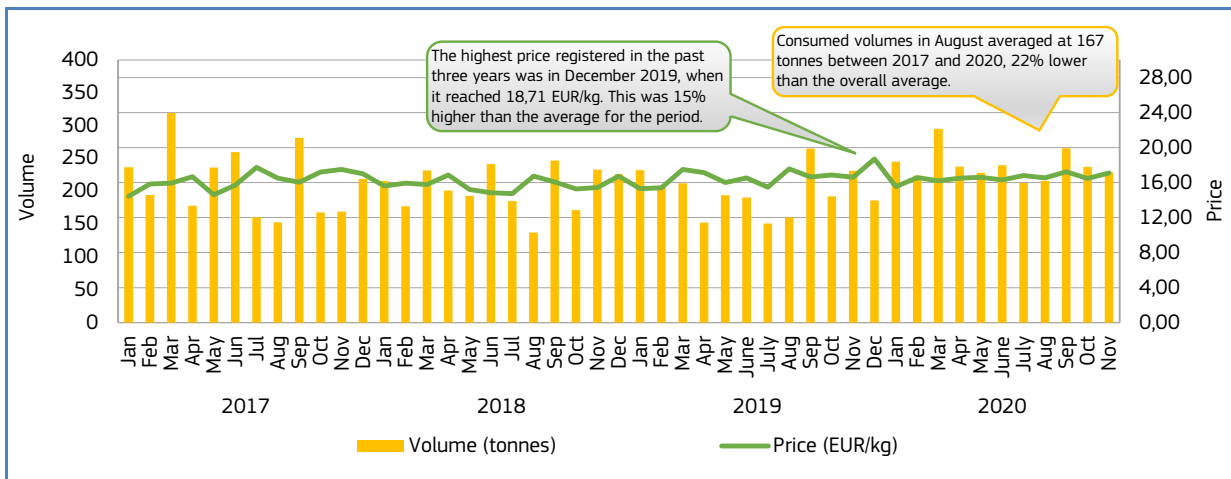
Yearly consumption: 2.576 tonnes (2017), 2.462 tonnes (2018), 2.376 tonnes (2019).

Short-term trend (January 2020 to November 2020): Seasonal increase price and stable in volume.

Average price: 16,53 EUR/kg.

Consumption: 2.630 tonnes.

Figure 45. **RETAIL PRICE AND VOLUME OF FRESH COD PURCHASED BY HOUSEHOLDS IN THE NETHERLANDS, JANUARY 2017 – NOVEMBER 2020**



Source: EUMOFA, based on Europanel (updated 12.01.2021).

4. Case study – Fisheries and aquaculture in South Africa

South Africa is the southernmost country on the African continent with a land surface area of 1.220.813 km². The total population stands at 59,62 million²⁵. South Africa has a coastline over 3.000 km long which borders the Indian Ocean to the southeast and the Atlantic Ocean to the southwest. The waters of South Africa are rich in marine biodiversity and species endemism, in large part due to the confluence of two great currents, the cold Benguela Current on the west coast and the warm Agulhas Current on the east coast. South Africa is the home of both small-scale and industrial-scale fisheries, targeting a diverse array of species for local and international consumption²⁶. The productive waters of the west coast support a variety of commercially exploited marine life, including hake, anchovy, sardine, horse mackerel, tuna, rock lobster and abalone. On the east coast, squid, linefish, and a wide range of intertidal resources (e.g. Donax clams, algae, crabs, oysters, etc.) provide an important source of food and livelihood for coastal communities²⁷. In 2018, 559.736 tonnes of fish were caught in South African waters²⁸.

The South African fishing industry employs an estimated 28.000 people in the primary sector, while more than 80.000 people are employed in the down- and up-stream fishery industry²⁹.

Although aquaculture is developing rapidly in South Africa, its contribution to the nation's seafood production is still minor (1% of national production³⁰). In 2018, aquaculture production reached 7.768 tonnes, of which about 75% came from marine waters³¹. Freshwater fish farming has been limited by government policies and suitable water supply. South Africa has a relatively low per capita fish consumption and is traditionally a net exporter.

4.1. Fishery production

In 2018, the fisheries sector produced 559.736 tonnes of fish, of which only 900 tonnes were caught in inland waters. Marine fisheries in South Africa are diversified both with respect to species caught and gear deployed. The catches are dominated in terms of volume by the small pelagic purse seine fishery for anchovy and sardine, and the demersal hake trawl fishery (which is also targeted by longlines, handlines and inshore trawlers). These two fisheries are primarily based on the South African west coast, as they are closely associated with the Benguela Current ecosystem and in particular the high productivity of associated nutrient upwelling³².

²⁵ <https://www.gov.za/about-sa/south-africa-glance>

²⁶ http://awsassets.wwf.org.za/downloads/wwf_a4_fish_facts_report_lr.pdf

²⁷ <https://www.gcis.gov.za/sites/default/files/docs/resourcecentre/pocketguide/2012/03%20Agriculture.pdf>

²⁸ According to FAO statistics.

²⁹ <http://www.fao.org/fishery/facp/ZAF/en#CountrySector-ProductionSector>

³⁰ According to FAO statistics.

³¹ Ibidem.

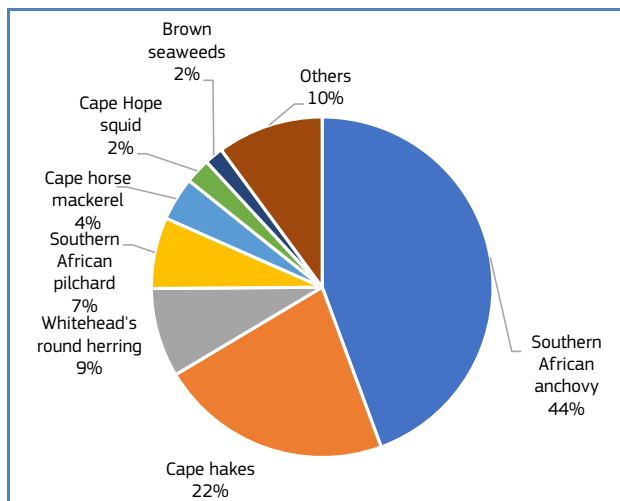
³² <http://www.fao.org/fishery/facp/ZAF/en#CountrySector-ProductionSector>

Table 24. **CATCHES BY MAIN SPECIES GROUPS IN SOUTH AFRICA (VOLUME IN TONNES)**

Major species groups	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Pelagic marine fish	353.198	459.696	343.376	524.111	240.374	401.819	375.255	420.113	342.353	374.570
Demersal marine fish	140.362	148.633	172.925	164.252	165.166	178.103	173.598	174.312	169.791	162.283
Cephalopods	10.386	10.246	8.644	6.702	2.988	7.111	7.109	9.587	1.177	14.172
Marine fish nei.	5.136	4.954	5.140	4.067	5.949	5.414	5.785	5.231	7.464	5.506
Crustaceans	2.546	4.218	2.812	2.772	2.692	2.546	2.334	1.899	1.746	2.305
Freshwater and diadromous fish	900	900	900	900	900	900	900	900	900	900
Molluscs excl. cephalopods	76	188	226	198	194	147	200	148	151	-
Total	512.604	628.835	534.023	703.002	418.263	596.040	565.181	612.190	523.582	559.736

Source: FAO.

Figure 46. **MAIN SPECIES CAUGHT IN SOUTH AFRICA IN 2018**



Source: FAO.

Southern African anchovy (*Engraulis cepansis*) is the most important species caught in South Africa (44% of all catches). Anchovy, round herring (*Etrumeus whiteheadi*) and Southern African pilchard (*Sardinops ocellatus*) targeted by purse seiners contribute to approximately 60% of all catches. Cape hakes (*Merluccius paradoxus* and *M. capensis*) are the second most important South African fishery contributing to 22% of the volume of fishery production. Horse mackerel (*Trachurus capensis*), targeted by the midwater trawl fishery amounted to 4% of all catches. South Africa's squid fishery and the brown seaweed fishery represent 2% of South African catches each.

4.2. Aquaculture production

Aquaculture is a relatively new industry in South Africa and is currently considered an underdeveloped sector. This sector has performed below its potential and remains a minor contributor to national fishery products and to the country's GDP³³. Despite its early-stage development, South African aquaculture has experienced a rapid increase since 2009. A total production of 4.357 tonnes was recorded in 2009 and 7.868 tonnes in 2018, which represents an increase of 81% during the last decade. Aquaculture production value has doubled during the same period and reached almost USD 78 million in 2018 (i.e. almost EUR 68 million³⁴). In 2015, the industry consisted of only 37 operational mariculture farms and 152 operational freshwater farms. However, mariculture dominates aquaculture production in South Africa, mainly due to the contribution of the well-established high-value abalone subsector³⁵. In 2018, the mariculture subsector accounted for a production of 5.858 tonnes (74% of total aquaculture production), while the freshwater subsector

³³ http://www.fao.org/fishery/countrysector/naso_southafrica/en

³⁴ The average exchange (USD to EUR) for 2018 has been used.

³⁵ Babatunde Adeleke, Deborah Robertson-Andersson, Gan Moodley & Simon Taylor (2020): Aquaculture in Africa: A Comparative Review of Egypt, Nigeria, and Uganda Vis-À-Vis South Africa, Reviews in Fisheries Science & Aquaculture.

recorded 2.011 tonnes (26%). Most freshwater farms employ recirculation systems, earth ponds or raceways for species farming. In the marine sector, molluscs (e.g. oysters, mussels) are farmed on rafts or long-lines, and abalone is farmed in inland tanks containing seawater pumped ashore from the ocean³⁶.

Mussel farming recorded the most significant production in 2018 (2.182 tonnes), followed by seaweeds which are only grown for feeding abalone (1.687 tonnes), rainbow trout (1.532 tonnes) and abalone (1.522 tonnes), while the farming of tilapia, catfish, oyster, marron (crayfish) and marine finfish is still emerging³⁷.

The South African government has historically focused on high-value species such as abalone, mussels and oysters, but has now identified aquaculture as an area for expansion, with special attention to freshwater aquaculture and its potential for growth. Constraints such as limited access to water and land, limited access to technology, high transaction costs, lack of supporting policies and legislation, barriers to marketing are currently being addressed by the administrative authorities - namely the Department of Agriculture, Forestry and Fisheries³⁸.

Table 25. **AQUACULTURE PRODUCTION BY MAIN SPECIES IN SOUTH AFRICA (VOLUME IN TONNES)**

Species	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Mediterranean mussel	682	700	570	860	1.116	1.682	1.758	1.960	2.084	2.182
Sea lettuces nei	500	1565	2.000	2.000	1.800	2.000	1.300	2.500	862	1.687
Perlemoen abalone	914	1015	1.036	1.111	1.470	1.307	1.479	1.400	1.276	1.522
Rainbow trout	949	950	1.199	1.428	1.522	1.500	1.500	1.500	1.250	1.532
Pacific cupped oyster	224	276	269	241	277	266	277	357	433	466
Mozambique tilapia	-	5	100	234	290	290	325	340	402	450
North African catfish	50	180	160	-	10	10	10	33	20	20
Common carp	30	1	-	-	-	-	-	-	5	5
Smooth marron crayfish	8	1	1	4	5	5	4	4	7	4
Total	4.357	4.693	5.335	5.878	6.490	7.060	6.653	8.094	6.338	7.869

Source: FAO.

4.3. Processing

South Africa's small pelagic fishery constitutes the bulk of its fish production. It is estimated that 85% of sardine catches is canned, whilst the remainder is frozen and packed in boxes for local and international bait markets³⁹. Anchovy is processed into fishmeal and is either exported or used by the agriculture sector locally⁴⁰. Most of the small pelagic fishery infrastructure (the fishing fleet and major canning and fishmeal factories) is situated on the west coast. Canning and fishmeal are part of this sector's operations, and six canning and processing companies and 15 packing entities are operational. This industry plays an important role in coastal areas by offering employment opportunities to local communities⁴¹.

³⁶ <https://southafrica.co.za/freshwater-fish-farming-south-africa.html>

³⁷ Babatunde Adeleke , Deborah Robertson-Andersson , Gan Moodley & Simon Taylor (2020): Aquaculture in Africa: A Comparative Review of Egypt, Nigeria, and Uganda Vis-À-Vis South Africa, Reviews in Fisheries Science & Aquaculture.

³⁸ http://www.fao.org/fishery/countrysector/naso_southafrica/en

³⁹ A summary of the South African sardine (and anchovy) fishery, 2019, is available at:

http://webcms.uct.ac.za/sites/default/files/image_tool/images/302/workshop/IWS2019/Sardine2019_IWS/MARAM_IWS_2019_Sardine_BG1%20background%20A%20summary%20of%20the%20sardine%20fishery.pdf

⁴⁰ <http://www.fao.org/fishery/facp/ZAF/en>

⁴¹ Isaacs, M. The humble sardine (small pelagics): fish as food or fodder. Agric & Food Secur 5, 27 (2016).

There are also many smaller processing plants scattered around the coast and in fishing ports. Generally, these do not add value to commercial catches, but rather process, freeze and pack products for export. Similarly, in most of the industrial fisheries, freezer vessels process and pack products for direct export. This includes hake, squid, and lobster⁴².

4.4. Exports and imports

South Africa is traditionally not a fish-eating nation, but rather a net exporter. In 2019, the annual value of exports exceeded imports by EUR 136 million, with imports valued at EUR 417 million and exports at EUR 553 million.

Table 26. **TRADE BALANCE FOR FISHERIES AND AQUACULTURE PRODUCTS IN SOUTH AFRICA (VALUE IN EUR 1.000)**

	2015	2016	2017	2018	2019
Imports	363.635	327.462	377.146	426.369	416.595
Exports	511.322	559.908	529.697	603.953	552.759
Balance	147.688	232.447	152.551	177.584	136.164

Source: EUMOFA elaboration of data from Global Trade Atlas - IHS Markit.

The EU is the leading market for South Africa's exported fisheries products. In 2019, the EU market represented 54% of the value of South African exports. Other destinations include Hong Kong (8%), the United States (6%), China (6%) and Australia (4%).

Hake is the most important species exported from South Africa. In 2019, 41.316 tonnes of hake were exported for a value of EUR 160 million (29% of total export value). Hake is either frozen onboard freezer vessels or frozen and packed for export in processing plants⁴³, with the main destination being the European and American markets, particularly since South Africa's hake fishery gained MSC certification⁴⁴.

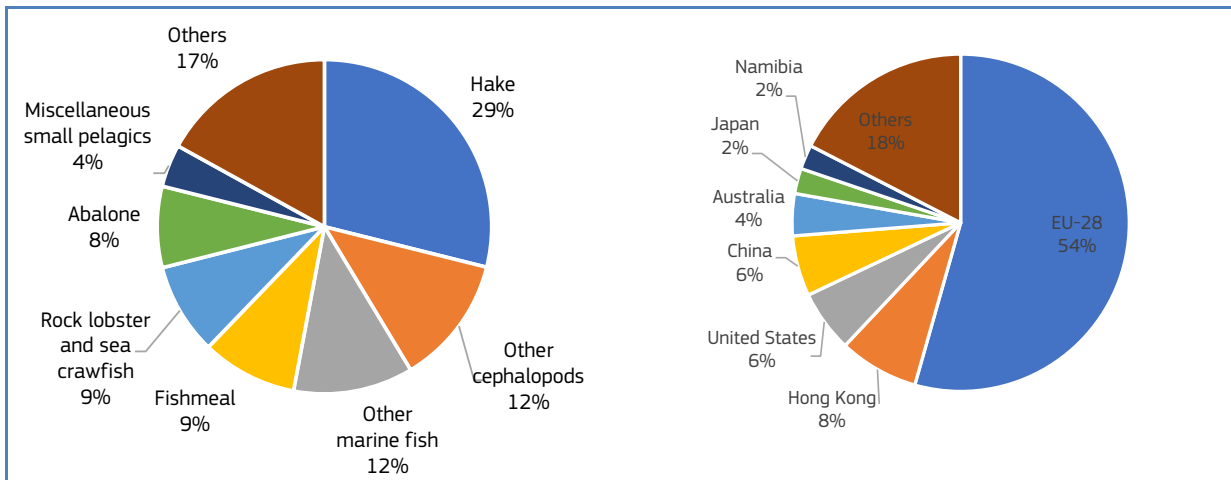
Squids (included in the category "other cephalopods" in are also among the most important species exported from South Africa. Squids are also exported frozen, mainly to European markets. Fishmeal is another valuable export commodity: in 2019, 44.281 tonnes of fishmeal were exported for a value of EUR 51 million, mainly to the European market and to a lesser extent to the Chinese and Turkish markets. Lobsters are exported fresh and frozen, mainly to the Asian and American markets.

⁴² <http://www.fao.org/fishery/facp/ZAF/en>

⁴³ <http://www.fao.org/fishery/facp/ZAF/en>

⁴⁴ Source: <http://www.fao.org/fishery/facp/ZAF/en>. The South African hake trawl fishery is certified by the Marine Stewardship Council (MSC). The fishery was certified in 2004 and in 2019 it entered a fourth re-certification process.

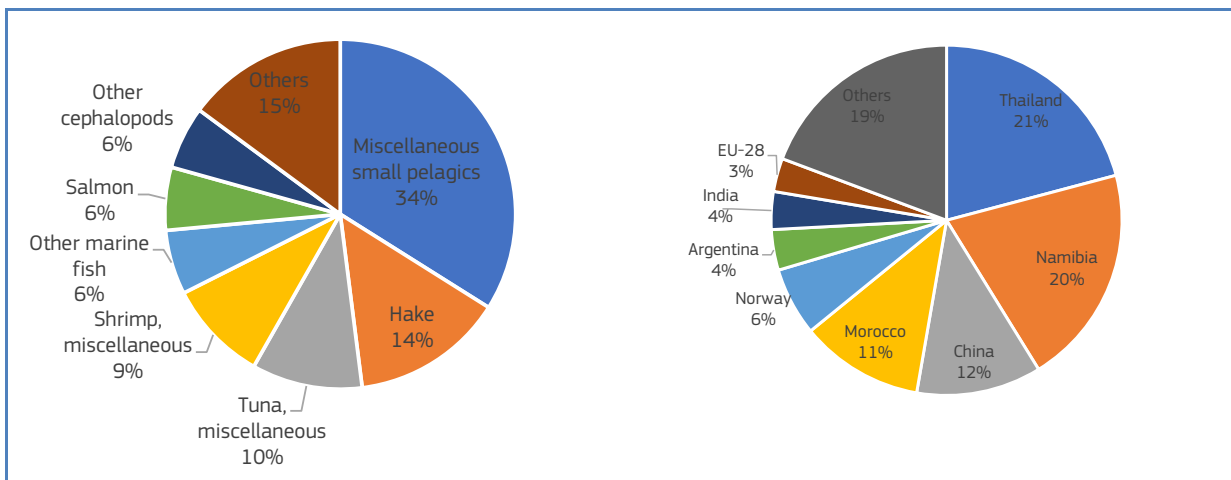
Figure 47. **MAIN COMMERCIAL SPECIES EXPORTED FROM SOUTH AFRICA (LEFT) AND MAIN DESTINATIONS OF SOUTH AFRICAN EXPORTS (RIGHT) IN 2019 IN VALUE TERMS**



Source: EUMOFA elaboration of data from Global Trade Atlas - IHS Markit.

In 2019, imports of fisheries and aquaculture products amounted to 256.640 tonnes with a value of EUR 416 million. South Africa imports mainly miscellaneous small pelagics (34% of total import value in 2019). Small pelagics are imported frozen. In fact, due to the decline in productivity and resultant reduced availability of small pelagics in South African waters, the South African canning sector imports raw (frozen) fish for processing⁴⁵. Small pelagics are also imported prepared/preserved. Other imported species include hake (14%), miscellaneous tuna (10%), and miscellaneous shrimp (9%). Main suppliers of fisheries products to the South African market are Thailand (21% of total import value in 2019, mainly prepared/preserved tuna and small pelagics), Namibia (20%, mainly frozen horse and Jack mackerels and prepared/preserved small pelagics), China (12%, mainly prepared/preserved small pelagics and frozen tilapia), and Morocco (11%, mainly frozen small pelagics).

Figure 48. **MAIN COMMERCIAL SPECIES IMPORTED TO SOUTH AFRICA (LEFT) AND MAIN ORIGINS OF SOUTH AFRICAN IMPORTS (RIGHT) IN 2019 IN VALUE TERMS**



Source: EUMOFA elaboration of data from Global Trade Atlas - IHS Markit.

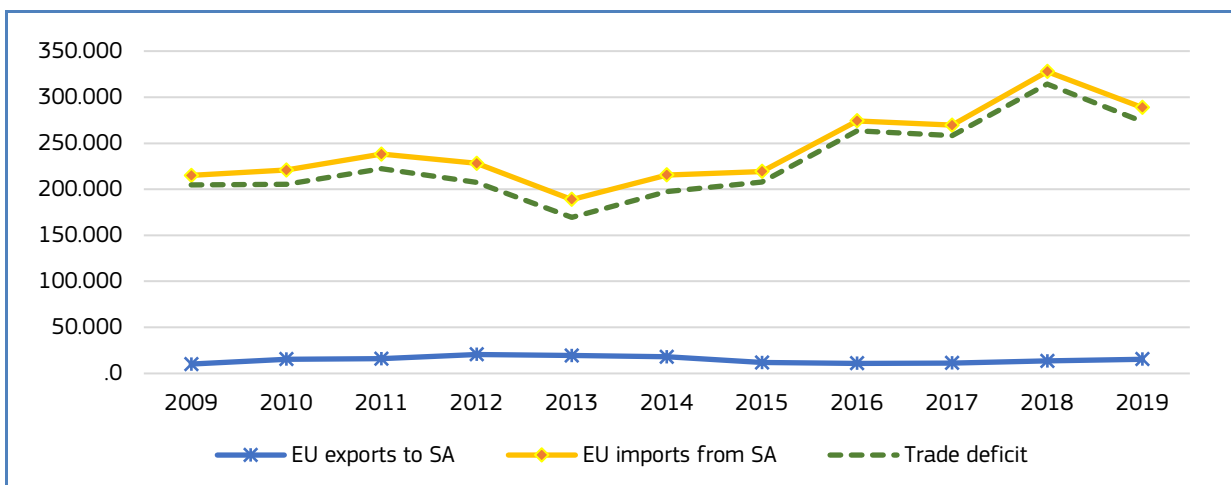
⁴⁵ Hara et al (2017) 'Trade and investment in fish and fish products between South Africa and the rest of SADC: Implications for food and nutrition security', Working Paper 47. PLAAS, UWC: Cape Town.

4.5. Trade flow with the EU

In October 1999, the European Union and South Africa signed a Trade, Development and Co-operation Agreement (TDCA) designed to enhance bilateral trade and economic, political and social co-operation. In June 2016, the EU and South Africa – together with Botswana, Lesotho, Mozambique, Namibia and Swaziland – signed the Southern African Development Community Economic Partnership Agreement (SADC EPA), which regulates trade in goods between the two regions, thereby replacing the trade-related provisions of the TDCA. Under the agreement the EU has fully or partially removed customs duties on 98.7% of imports from South Africa.

As stated, Europe is the most important market for the South African fisheries and aquaculture products. Looking more specifically at trade flows between South Africa and EU Member States between 2009 and 2019, the EU trade deficit has increased as a result of the increase of the imports from South Africa, both in terms of volume and value. In 2019, the EU trade deficit with South Africa reached over EUR 279 million.

Figure 49. **TRADE FLOWS BETWEEN THE EU AND SOUTH AFRICA (value in EUR 1.000)**



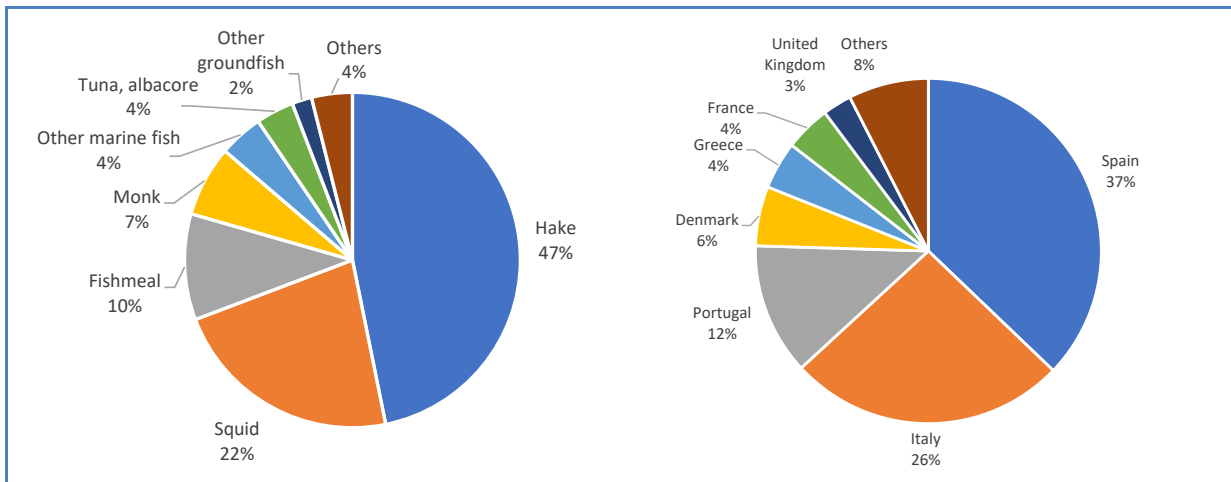
Source: EUMOFA elaboration of data from Global Trade Atlas - IHS Markit.
*Values are deflated by using the DGP deflator (base=2015).

EU imports from South Africa

In 2019, the EU imported 80.597 tonnes of fisheries and aquaculture products from South Africa for a total value of over EUR 295 million. Hake, squid and fishmeal constitute the bulk share of EU imports. In 2019, they formed 79% of EU imports volume from South Africa and 84% of their value. Spain, Italy and Portugal are the main markets for these, imports and together constituted 75% of EU imports in 2019. Particularly:

- Spain is the major importer within the EU (36% of EU imports in terms of volume and 37% in terms of value). In 2019, Spain was responsible of almost half of EU imports of hake (45% of EU total import volume), mainly frozen whole and in fillets (90% of Spanish imports of hake), and fresh (10%). Spain was also responsible of 38% of the EU imports of squid and 20% of the EU imports of fishmeal.
- Italy is the second most important EU market for fisheries products from South Africa. It was responsible for 16% of EU total import volume and 26% of its value. Main species imported were frozen hake (fillets or whole) and squid (whole).
- Portugal imported mainly hake.
- Denmark was responsible for over half of the EU imports of fishmeal.
- France imported mainly hake and fishmeal.
- Greece imported mainly fishmeal.

Figure 50. **MAIN COMMERCIAL SPECIES IMPORTED FROM SOUTH AFRICA TO THE EU MARKET (LEFT) AND MAIN IMPORTING MEMBER STATES (RIGHT) IN 2019 IN VALUE TURMS**

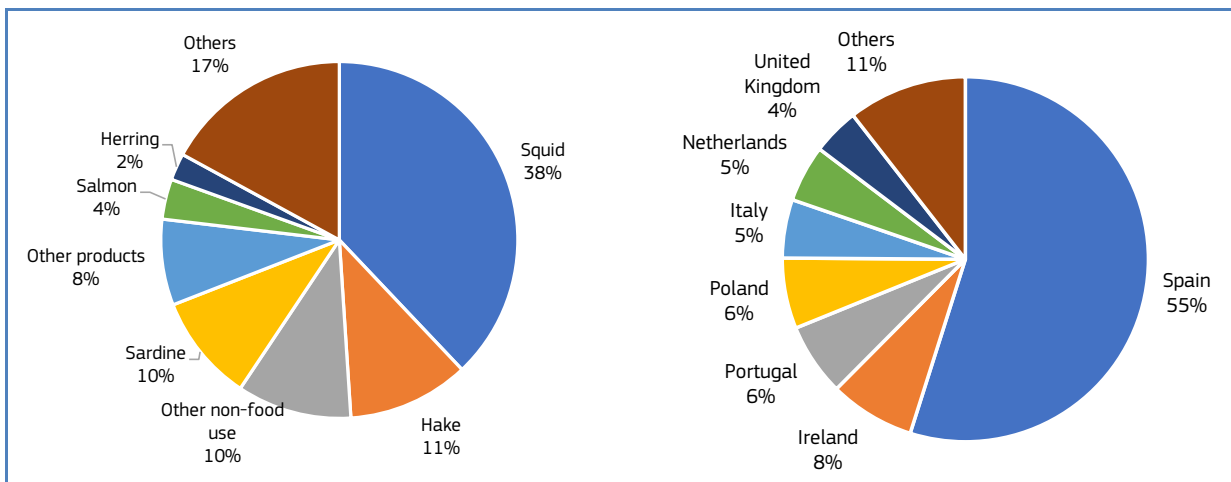


Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

EU exports to South Africa

In 2019, the EU exported 10.238 tonnes of fisheries and aquaculture products to South Africa for a total value of almost EUR 16 million. Main species exported are squid (27% of EU exports in terms of volume and 38% in terms of value), hake (14% of exports volume and 11% of exports value), other non-food use products⁴⁶ (the first species exported in terms of volume and third in terms of value), and sardine (8% of EU exports volume and 10% of their value). Spain is the main EU exporter to South Africa.

Figure 51. **MAIN COMMERCIAL SPECIES EXPORTED FROM THE EU TO SOUTH AFRICA (LEFT) AND MAIN EXPORTING MEMBER STATES (RIGHT) IN 2019 IN VALUE TURMS**

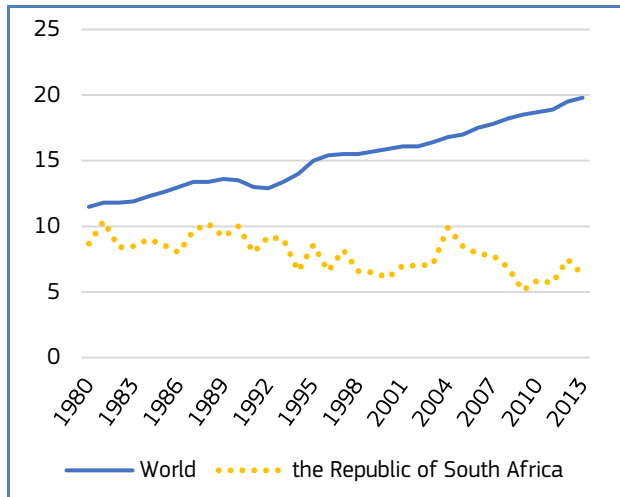


Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

⁴⁶ This category includes fish or crustaceans, molluscs or other aquatic invetebrates, and seaweeds and other algae, that are unfit for human consumption

4.6. Consumption

Figure 52. **PER CAPITA CONSUMPTION OF FISHERIES PRODUCTS IN SOUTH AFRICA AND IN THE WORLD (volume in kg)**



Source: FAO.

Whereas Africa's coastal communities traditionally have diets high in fish, much of the inland population (which is significantly larger than the coastal population) eat relatively little fish, which makes the national per capita fish consumption in South Africa low⁴⁷. The figure below provides the per capita consumption of fisheries products in South Africa and in the world between 1980 and 2013, as estimated by FAO. It shows that while the world's per capita consumption of seafood has significantly increased, the per capita consumption of seafood in South Africa has fluctuated with an overall decreasing trend, from 8,7 Kg/capita in 1980 to 6,3 Kg/capita in 2013. According to FAO, per capita consumption in South Africa has continued to decrease to reach 6,1 Kg/ capita in 2016⁴⁸. Pelagic fishes in South Africa are the most important fish category consumed, at 3,1 Kg/capita.

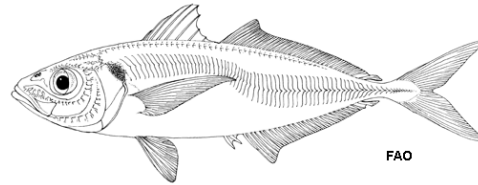
⁴⁷ <http://www.fao.org/fishery/facpl/ZAF/en>

⁴⁸ <http://www.fao.org/fishery/facpl/ZAF/en>

5. Case study – Horse mackerel in the EU

Horse mackerels comprise a number of species within the family Carangidae, rather than the 'true' mackerel family Scombridae. They are widely spread and consist of many different stocks.

Atlantic horse mackerel (*Trachurus trachurus*) are found in the Eastern Atlantic Ocean off Europe and Africa. In European waters, there are three Atlantic horse mackerel populations, known as the North Sea, Southern, and Western stocks.



The main fishing gear types used for horse mackerel are pelagic trawl nets and purse seines, which also fish for mackerel, herring, and blue whiting. In Spain and Portugal, smaller vessels that fish for a variety of species also catch horse mackerel. Horse mackerel used to be caught for processing into fishmeal and fish oil, but since the 1970s it has instead been marketed for human consumption.

Horse mackerel is eaten fresh in Portugal and Spain, although nearly 90% of horse mackerel landed in Europe is exported, mostly frozen, to Africa (principally Egypt) and Japan⁴⁹. In 2020, 84.000 tonnes of horse mackerel were landed in the EU, primarily in Spain, Portugal, and the Netherlands.

Horse mackerel is a healthy fish and a good source of Omega-3 fatty acids. They have a light flavour and are popular to prepare as grilled, smoked, canned, and as sushi, particularly in Japan⁵⁰.

5.1. Biology

Atlantic horse mackerel (*Trachurus trachurus*) is the most commonly caught horse mackerel species in European waters. They can attain a maximum length of 70 cm, but average at around 22 cm, with a maximum published weight of 2 kg. Horse mackerel mature at a length of around 24 cm (within a range of 21 to 30 cm)⁵¹.

Horse mackerel swim in schools at depths of 10 to 100 m, generally in the high seas. In the summer months, they are common near the coast, but in winter they emigrate to deep waters, sometimes to depths of over 500 m. They are particularly common in sandy, shallow areas.

Adult horse mackerel feed on smaller schools of fish (herring, sardines etc.), crustaceans, and cephalopods. The young feed on planktonic larvae and crustaceans.

The Western stock spawns in the Bay of Biscay, UK, and Irish waters in early spring, migrating to the Norwegian Sea and North Sea. The North Sea stock spawns in the southern North Sea in summer and migrates to the central North Sea, Skagerrak, and Kattegat⁵². The Southern stock is found in the Atlantic waters off the Iberian Peninsula⁵³.

⁴⁹ European Commission <http://aei.pitt.edu/86742/1/44.pdf>

⁵⁰ <https://www.hi.no/en/hi/temasider/species/horse-mackerel>

⁵¹ <https://www.mcsuk.org/goodfishguide/fish/492>

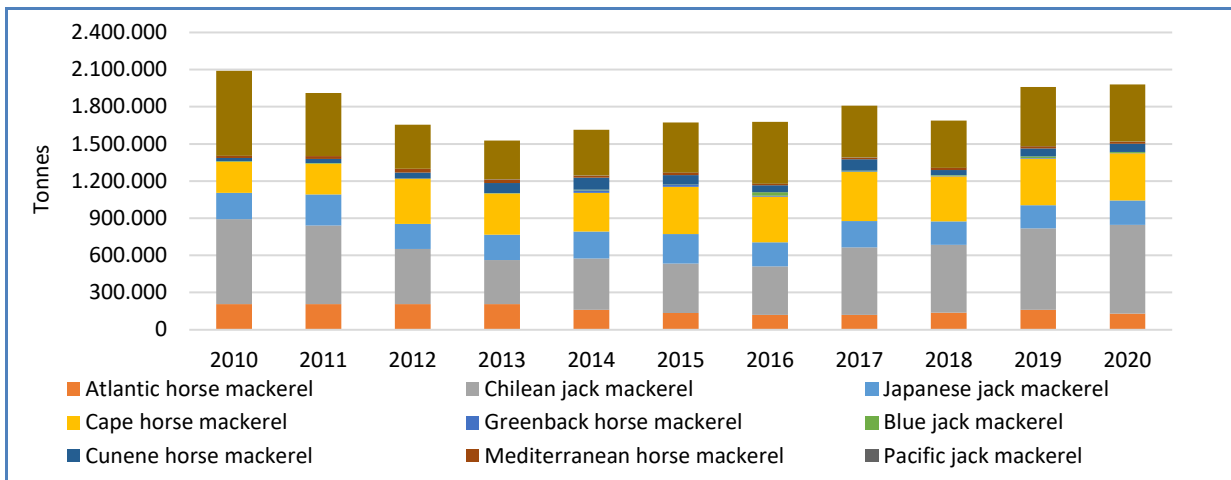
⁵² <https://www.fishbase.se/summary/Trachurus-trachurus.html>

⁵³ https://www.researchgate.net/publication/265160891_Applying_biomass_dynamic_models_to_the_Southern_horse_mackerel_stock_Atlantic_waters_of_Iberian_Peninsula_A_comparison_with_VPA-based_methods

5.2. Global catches of horse mackerel

The global catches of different horse mackerel stocks varied from 1,5 up to 2,1 million tonnes within the past 10 years. In 2019, world catches were around 1,96 million tonnes, a 16% increase from the year before. Atlantic horse mackerel accounted for around 8% of the global catches in 2019. The largest horse mackerel stocks are the Chilean jack mackerel and the Cape horse mackerel, accounting for 34% and 19% of the global catches in 2019, respectively. Chilean jack mackerel are mainly caught by the Chilean fishing fleet outside Chilean waters, but some are also caught in international waters of fishing vessels from Europe and Asia. Cape horse mackerel is mainly caught off the African coast by the Namibian fishing fleet.

Figure 53. TOTAL WORLD CATCHES OF HORSE MACKERELS



Source: FAO, Pelagic Fish Forum.

5.3. First sales of horse mackerel in the EU

Three species of genus *Trachurus* (*T. trachurus*, *T. mediterraneus*, and *T. picturatus*) are found together and are commercially exploited in North East Atlantic waters⁵⁴.

In the EU, horse mackerel landings are categorised as Atlantic horse mackerel (*Trachurus trachurus*) or other horse mackerels.

In 2020, first sales of Atlantic horse mackerel in the EU reached 76.000 tonnes worth EUR 70 million. This was a 19% decrease in first-sales volume and an 18% decrease in value compared to 2019. Spain was the most important country, accounting for 54% of volume and 51% of value. Other major countries for first sales were Portugal (19% of volume and 24% of value) and the Netherlands (24% of volume and 23% of value). These three countries together accounted for 98% of volume and 97% of value.

In 2020, first sales of other horse mackerels in the EU reached 8.000 tonnes worth EUR 9 million. In terms of value, Spain was the most important country, accounting for 40% of volume and 46% of value. Portugal was the second-largest, accounting for 41% of the volumes and 32% of the values. From 2019 to 2020, first sales of other horse mackerels experienced a 3% increase in volumes and a 12% increase in values.

⁵⁴<https://www.ices.dk/sites/pub/Publication%20Reports/Expert%20Group%20Report/Fisheries%20Resources%20Steering%20Group/2019/WG%20WIDE/07%20WG%20WIDE%20Report%202019%20-%2005%20Horse%20mackerel%20in%20the%20Northeast%20Atlantic.pdf>

Table 27. **ATLANTIC HORSE MACKEREL – FIRST SALES IN THE EU (VOLUME IN 1000 TONNES, VALUE IN MILLION EUR)**

Landing nation	2016		2017		2018		2019		2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Spain	45	31	33	26	37	30	47	36	41	35
Portugal	20	17	19	16	16	18	17	21	15	17
Netherlands	2	2	12	12	31	31	27	27	18	16
France	1	1	1	1	1	1	1	1	1	1
Other	20	16	1	1	0,5	1	1	1	0,4	1
Total first sale	88	67	66	56	85	81	94	85	76	70

Source: EUMOFA.

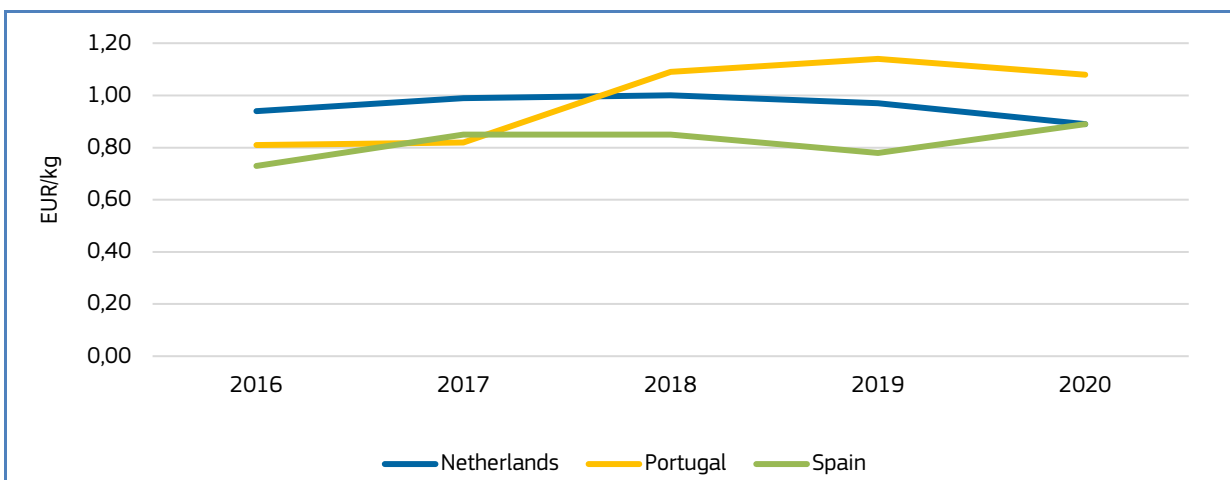
Table 28. **OTHER HORSE MACKEREL – FIRST SALES IN THE EU (VOLUME IN 1000 TONNES, VALUE IN MILLION EUR)**

Landing nation	2016		2017		2018		2019		2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Spain	10	10	7	8	3	3	3	3	3	4
Portugal	5	3	5	3	4	3	4	3	3	3
United Kingdom	2	1	0,2	0,1	0,2	0,1	1	0,5	0,3	0,2
France	0,4	1	0,4	1	1	1	0,5	1	1	1
Italy	0,2	0,3	0,2	0,2	0,1	0,2	0,2	0,2	0,1	0,2
Other	12,1	8	3	2	1	1	1	1	1	1
Total first sale	29	22	15	14	8	8	8	8	8	9

Source: EUMOFA.

In the Netherlands, from 2019 to 2020, the average first-sales price fell by 8% to 0,89 EUR/kg. Over the same period, Portugal saw a fall in the average first-sales price of 5% to 1,08 EUR/kg, while in Spain there was a 14% growth in first-sales price to 0,86 EUR/kg.

Figure 54. **FRESH ATLANTIC HORSE MACKEREL – AVERAGE YEARLY FIRST-SALES PRICE IN MAIN COUNTRIES**



Source: EUMOFA.

5.4. Extra-EU exports

In 2019, extra-EU exports of horse mackerel amounted to 108.000 tonnes worth EUR 109 million. This was a 3% decrease in volume and a 1% increase in value since 2018. From 2015 to 2019, more than 95% of horse mackerel exports were frozen, and the rest was fresh. The presentation state was whole/gutted. The largest supplying nations were the Netherlands, Ireland, and Spain, which together covered 95% of both export volume and value.

Exports from the Netherlands increased by 9% in terms of volume and 16% in terms of value in 2019, while exports from Ireland decreased 16% in volume and 15% in value during the same period.

Table 29. **HORSE MACKEREL EXPORTS FROM THE EU BY COUNTRY (VOLUME IN 1.000 TONNES, VALUE IN MILLION EUR)**

Exporting nation	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Netherlands	52	66	48	52	40	38	44	42	49	49
Ireland	36	46	27	29	31	31	31	35	26	30
Spain	42	34	47	36	40	36	29	25	28	25
Portugal	2	2	2	2	3	3	2	3	2	2
Other	10	12	17	13	4	4	5	4	3	3
Total	141	159	141	132	118	112	111	109	108	109

Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

As exports of horse mackerel are greater than landings in the Netherlands, it should be noted that some of the export volumes are re-exports, as the Netherlands is a large seafood hub for many European suppliers. In 2019, imports in the Netherlands reached 25.000 tonnes, a 21% decrease from 2018. The main supplying countries were Germany, the UK, and France, accounting for 78% of total import volumes.

Table 30. **HORSE MACKEREL IMPORTS TO THE NETHERLANDS (volume in 1.000 tonnes, value in million EUR)**

Supplying nation	2015	2016	2017	2018	2019
	Volume	Volume	Volume	Volume	Volume
Germany	17	15	11	11	9
United Kingdom	5	6	6	5	7
France	2	1	4	3	3
Lithuania	4	6	4	8	2
Norway	1	1	1	1	1
Other	0,5	3	2	3	3
Total	30	32	27	31	25

Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

Egypt is by far the largest market for horse mackerel exported by the EU. In 2019, exports to Egypt reached 54.000 tonnes, worth EUR 51 million, accounting for 50% of total export volume and 47% of value. Japan and China were the second and third largest markets for horse mackerel from the EU, accounting for 8% and 5% of volume, respectively.

In 2019, export volume to Egypt increased by 53% and value by 73%, while export volume to Japan decreased by 8% and value by 5%. Export volume to China increased 18% and value by 19% compared to 2018.

Table 31. **HORSE MACKEREL EXPORTS FROM THE EU TO MAIN MARKETS (VOLUME IN 1.000 TONNES, VALUE IN MILLION EUR)**

Destination market	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Egypt	62	63	54	48	40	33	36	29	54	51
Japan	9	13	11	15	8	12	9	12	8	11
China	4	5	4	5	5	6	5	5	5	7
Ghana	5	6	8	7	6	4	9	8	6	5
Cameroon	14	18	11	11	14	14	15	18	4	5
Mozambique	4	2	4	2	7	5	7	5	5	4
Benin	5	4	3	3	3	2	2	1	5	4
Other	39	48	46	41	35	35	29	30	20	22
Total	141	159	141	132	118	112	111	109	108	109

Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

5.5. Extra-EU imports

In 2019, extra-EU imports of horse mackerel amounted to 5.700 tonnes worth EUR 6,3 million. This was an 8% increase in volume and a 1% decrease in value since 2018. In 2019, 75% of imports were frozen horse mackerel, while the rest was fresh. The presentation state was whole/gutted. The largest supplying nations were Chile, Norway, and the Faroe Islands.

Table 32. **EXTRA-EU IMPORTS OF HORSE MACKEREL TO EU (VOLUME IN 1000 TONNES, VALUE IN MILLION EUR)**

Supplying nation	2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Chile	0,1	0,1	0,8	0,9	2,8	3,0	2,1	2,2
Norway	1,0	1,6	1,0	1,6	1,9	2,6	2,9	3,1
Faroe Islands	n/a	n/a	0,020	0,018	0,003	0,002	n/a	n/a
Other	0,6	0,8	0,5	0,7	0,6	0,8	0,7	1,0
Total	1,8	2,5	2,4	3,2	5,3	6,4	5,7	6,3

Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

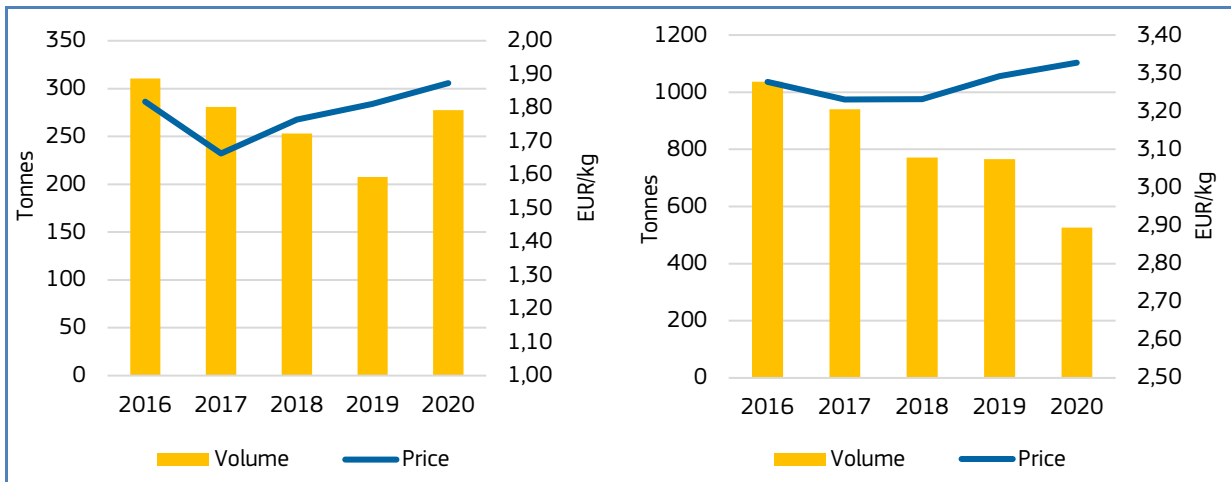
5.6. Consumption

The consumption of horse mackerel in the EU is limited, as most is exported to foreign countries. In Spain and Portugal, however, there is a market for fresh horse mackerel.

In the Mercabarna fresh fish market in Spain (Barcelona), sales of fresh horse mackerel decreased by 11% in terms of volume to around 288 tonnes from 2016 to 2020. From 2019 to 2020, the volume sold increased by 34%. Average sales price increased 3% from 2019 to 2020 to 1,87 EUR/kg.

In the Mercamadrid (Madrid) fish market, sales of fresh horse mackerel decreased by 49% in terms of volume to around 526 tonnes from 2016 to 2020. From 2019 to 2020, the volume sold decreased by 31%. Average sales price increased slightly (1%) from 2019 to 2020 to 3,32 EUR/kg.

Figure 55. **FRESH HORSE MACKEREL SOLD IN THE MERCABARNA MARKET (LEFT) AND MERCAMADRID MARKET (RIGHT)**



Source: www.mercabarna.es and <https://www.mercamadrid.es/mercado-central-de-pescados/>

6. Global highlights

EU / Greenland / Fisheries: On 8 January 2021, the EU and Greenland concluded negotiations for a new four-year Sustainable Fisheries Partnership Agreement (SFPA) and a new Protocol. This is the only mixed SFPA in the North Atlantic, and the third most important agreement in place for the EU in financial terms. It will allow the EU fleet (12 large-scale industrial trawlers) to continue fishing in Greenland waters for four years while continuing to contribute to the development of the fisheries sector in Greenland. Fishing opportunities have been negotiated for cod, redfish, Greenland halibut, northern prawn, capelin and grenadier⁵⁵.



Spain / Aquaculture: According to the report 'Aquaculture in Spain 2020', published by APROMAR, the Business Association of Producers of Marine Farming in Spain, aquaculture production in Spain reached 342.867 tonnes in 2019. This production reached an overall first-sales value of EUR 501 million. The main species produced were mussels (261.513 tonnes), followed by European seabass (27.335 tonnes), rainbow trout (18.955 tonnes) and gilthead seabream (13.521 tonnes)⁵⁶.

Norway / Fishing fleet: The total number of fishing vessels was reduced from 6.018 in 2018 to 5.980 in 2019, a reduction of 38 vessels. Removal of inactive fishing vessels from the Register of Norwegian Fishing Vessels, the introduction of an annual fee on vessels for being registered and the decommissioning scheme for small coastal vessels holding annual permits are the main reasons for the strong reduction in the number of smaller coastal vessels⁵⁷.

Faroe Islands / Supply: In 2019, the Faroe Islands fishing fleet caught 632.155 tonnes of fish, of which blue whiting (333.480 tonnes) and herring (115.695 tonnes) dominated in volume. In the same year, the Faroese aquaculture industry recorded increased production of 77.863 tonnes of Atlantic salmon, compared to 64.732 tonnes recorded in 2018⁵⁸.

Iceland / Fisheries / Supply: The total fish catch of Icelandic vessels in 2020 was just over 1.021 thousand tonnes, which is 3% more than in 2019. Pelagic catch was 530 thousand tonnes, 5.000 tonnes less than in 2019. Demersal catch decreased by 3% between years, from 273 thousand tonnes in 2019 to 277 thousand tonnes in 2020⁵⁹.

Slovenia / Fisheries / Supply: Slovenia's 2019 catch of 121 tonnes of fisheries products was 4,4% lower than in 2018. The value of fish products landed in 2019 was about EUR 0,9 million, 2% higher than the purchase value of landing in 2018⁶⁰.

Tuna / Trade / COVID-19 Since the COVID-19 outbreak, fresh tuna trade (both exports and imports) remains limited worldwide due to limited restaurant sales and international flights. Demand for frozen tuna loins increased, but at a lower extent⁶¹.

Fishmeal / Supply / Trade: For the first eight months of 2020, a total of 2,37 million tonnes of raw material for fishmeal production was landed in ports along the Peruvian coast, a 2% decrease in volume compared to the same period of 2019. Cumulative production of fishmeal in Northern Europe increased during January - August 2020 by around 12%, while fish oil production increased by 26%. Peruvian fishmeal exports tumbled to a mere 265.841 tonnes in the first half of 2020, a drop of 58% compared to the same period of 2019. The plunge is largely due to the COVID-19 pandemic's impact on many countries, and in particular due to stricter border controls in the main markets in Asia. In terms of fish oil, Peruvian exports decreased by 51% from 95.910 tonnes in 2019 to 46.848 tonnes in the first half of 2020. Traditionally, Denmark is the main destination market for Peruvian fish oil, however, during the reporting period, Belgium took over Denmark to become the largest importer⁶².

⁵⁵ https://ec.europa.eu/fisheries/press/eu-and-greenland-reach-agreement-new-fisheries-partnership_en

⁵⁶ <http://www.apromar.es/content/aquaculture-spain-2020>

⁵⁷ <https://www.fiskeridir.no/English/Fisheries/Statistics/Fishermen-fishing-vessels-and-licenses>

⁵⁸ <https://www.faroese seafood.com/fishery-aquaculture/stats/>

⁵⁹ <https://www.statice.is/publications/news-archive/fisheries/fish-catch-in-december-2020/>

⁶⁰ <https://www.stat.si/StatWeb/en/News/Index/8919>

⁶¹ <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1268648/>

⁶² <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1263877/>

7. Macroeconomic Context

7.1. Marine fuel

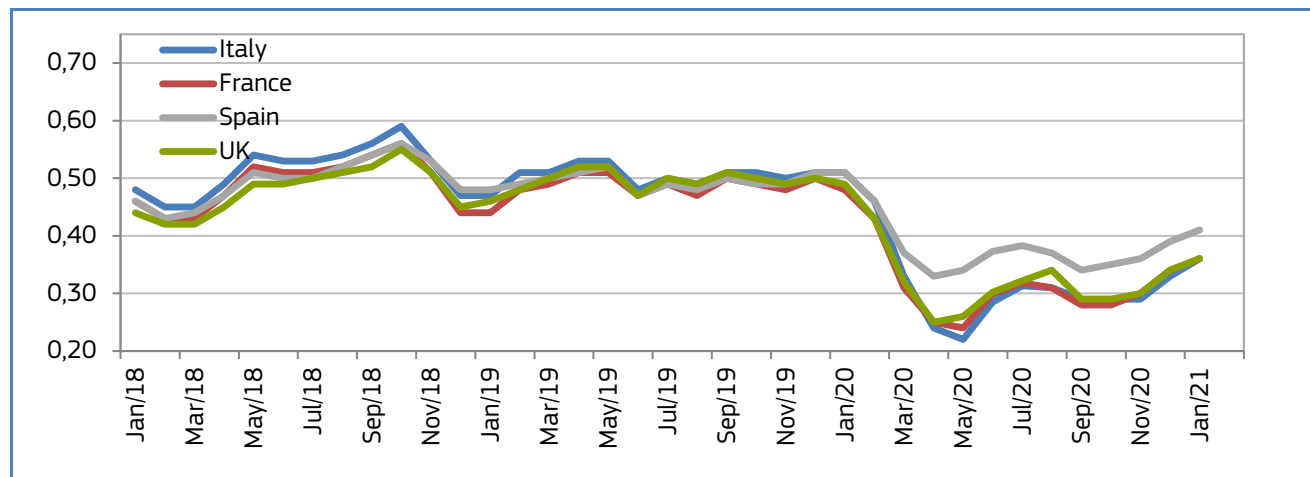
Average prices for marine fuel in **January 2021** ranged between 0,36 and 0,41 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices increased by about 6,5% compared with the previous month, although they decreased by 25% compared with the same month in 2020.

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

Member State	Jan 2021	Change from Dec 2020	Change from Jan 2020
France <i>(ports of Lorient and Boulogne)</i>	0,36	6%	-25%
Italy <i>(ports of Ancona and Livorno)</i>	0,36	9%	-29%
Spain <i>(ports of A Coruña and Vigo)</i>	0,41	5%	-20%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,36	6%	-27%

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

Figure 56. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/LITRE)**



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

7.2. Consumer prices

The EU annual inflation rate was at 0,3% in December 2020, up from 0,2% in November 2020. A year earlier, the rate was 1,6%.

Inflation: lowest rates in December 2020, compared with November 2020.



Inflation: highest rates in December 2020, compared with November 2020.

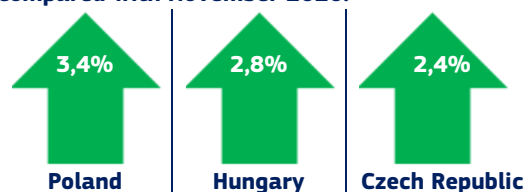


Table 34. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

HICP	Dec 2018	Dec 2019	Nov 2020	Dec 2020	Change from Nov 2020	Change from Dec 2019
Food and non-alcoholic beverages	104,96	107,57	109,09	108,67	↓ 0,4%	↑ 1,0%
Fish and seafood	109,51	111,42	112,53	113,03	↑ 0,4%	↑ 1,4%

Source: Eurostat.

7.3. Exchange rates

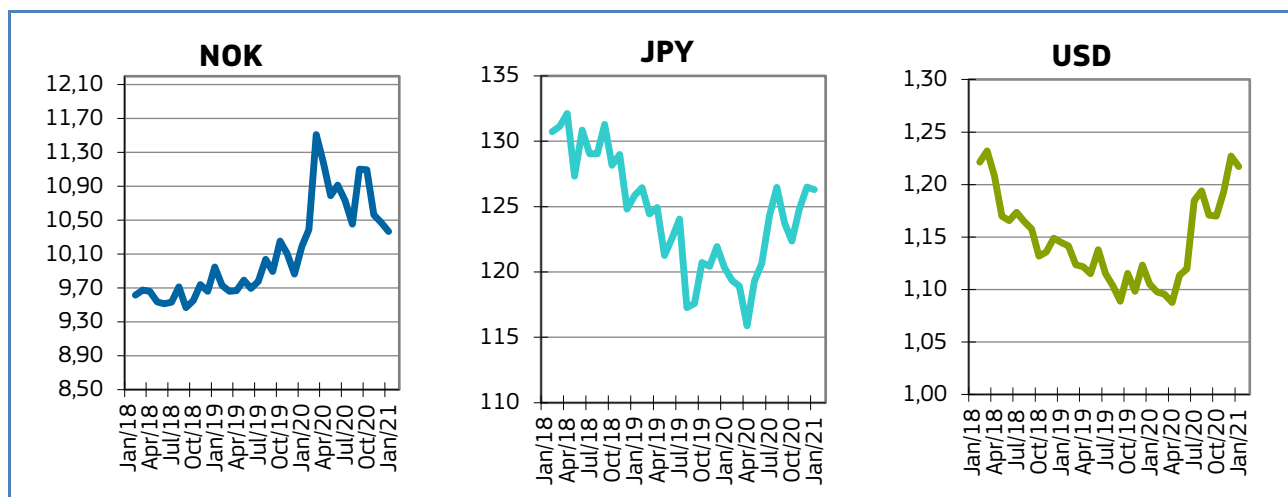
Table 35. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Jan 2019	Jan 2020	Dec 2020	Jan 2021
NOK	9,9483	10,1893	10,4703	10,3661
JPY	125,85	120,35	126,49	126,31
USD	1,1450	1,1050	1,2271	1,2171

Source: European Central Bank.

In January 2021, the euro depreciated against the Norwegian krone (-1,0%) and the Japanese yen (-0,1%) and remained stable against US dollar relative to the previous month. For the past six months, the euro has fluctuated around 1,20 against the US dollar. Compared with January 2020, the euro has appreciated 5,0% against the Japanese yen, 1,7% against the Norwegian krone, and 10,1% against the US dollar.

Figure 57. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

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

First sales: European Parliament, Council of the European Union

Consumption: EUROPANEL, FAO.

Case studies: South African Government, WWF, FAO, MARAM/IWAS 2019, European Commission, Institute of Marine Research (Bergen); MSC, FishBase, ReasearchGate.net, ICES.

Global highlights: DG Mare - European Commission, FAO, Directorate of Fisheries of Norway, Faroese Seafood, Statistics Iceland, Statistical Office of Slovenia.

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

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

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

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

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

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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