European Commission

Monthly Highlights

No. 7 / 2021

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

In this issue

In April 2021, according to data collected by EUMOFA from 14 EU Member States, first sales of "freshwater fish" reached a value of EUR 406.000 and a volume of 357 tonnes.

From May 2018 to April 2021, the weighted average first-sales price of European eel in Poland was 11,32 EUR/kg, 65% higher than in France (6,84 EUR/kg), and 55% greater than in the Netherlands (7,31 EUR/kg).

Since the beginning of the year up to week 21, both price and volume of frozen surimi from Vietnam exhibited an upward trend.

The European Commission signed the first annual agreement on fishing with the United Kingdom. The agreement establishes the total allowable catches (TAC) for 75 shared fish stocks for 2021.

Malaysia has one of the highest consumption rates of fisheries and aquaculture products in the world, at 59 kg per capita, and has been hard hit by the pandemic.

Deep-water rose shrimp is an important Mediterranean species, with almost 20.000 tonnes landed mostly from Italy, Spain, and Greece.

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1. First sales in Europe

During **January–April 2021**, 14 EU Member States (MS), the United Kingdom, and Norway reported first-sales data for 10 commodity groups[1]. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section "*First sales in Europe*" are extracted from EUMOFA[2].

1.1. January-April 2021 compared to the same period in 2020

Increases in both value and volume: Bulgaria, Cyprus, Estonia, France, Latvia, Lithuania, and Portugal were the countries that recorded an increase in both first-sales value and volume. The highest relative increase was observed in Bulgaria due to high sales of sprat, while herring was the main species behind the increases in Lithuania.

Decreases in both value and volume: Denmark, the Netherlands, Poland, Sweden, and Norway recorded decreases in first-sales value and volume. The Netherlands experienced the most significant decrease, which was due to a lower supply of mackerel and herring.

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

	January - April 2019		January - April 2020		January - April 2021		Change from January - April 2020	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Belgium	4.609	19,4	4.304	20,2	4.407	18,0	2%	-11%
Bulgaria	1.161	0,6	326	0,4	720	0,6	121%	66%
Cyprus	140	1,0	98	0,7	127	0,9	29%	23%
Denmark	387.949	169,4	284.604	134,6	270.069	122,5	-5%	-9%
Estonia	28.934	6,4	22.572	6,1	29.669	7,1	31%	17%
France	61.619	205,9	48.525	162,2	55.870	187,0	15%	15%
Italy	26.022	106,6	22.462	85,5	22.412	95,5	0%	12%
Latvia	22.572	3,8	18.200	3,6	20.811	4,3	14%	19%
Lithuania	525	0,4	958	0,4	1.286	0,7	34%	56%
Netherlands	90.023	133,9	80.628	114,4	65.833	88,7	-18%	-22%
Poland	54.520	13,8	55.844	12,8	47.891	10,8	-14%	-16%
Portugal	26.934	76,1	18.617	60,7	22.290	72,7	20%	20%
Spain	168.915	498,0	156.375	409,6	154.232	422,1	-1%	3%
Sweden	95.534	34,3	58.686	25,2	49.141	21,3	-16%	-15%
Norway	1.192.276	1086,0	1.239.910	1131,2	1.220.449	1.030,2	-2%	-9%
United Kingdom	91.510	191,3	97.989	159,0	110.084	157,0	12%	-1%

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

[1] Bivalves and other molluscs and aquatic invertebrates, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, salmonids, small pelagics, tuna and tuna-like species, and other marine fish.
[2] First sales data updated on 16.6.2021.

1.2. April 2021 compared to April 2020

Increases in both value and volume: First sales increased in Belgium, Bulgaria, Cyprus, France, Portugal, Spain, and the United Kingdom. Sprat in Bulgaria, picarel and seabream (other than gilthead seabream) in Cyprus, and Norway lobster and blue whiting in the UK were the main species behind the increases in the countries with some of the highest relative growths. Spain had one of the highest overall increases in first-sales value and volume due to anchovy

Decreases in both value and volume: First sales decreased in Denmark, Latvia, Lithuania, the Netherlands, Poland, Norway, and Sweden. Poland saw the highest relative decreases due to sprat and herring, while blue whiting was among the key species behind the decline in the Netherlands.

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

	April 2019		April 2020		April 2021		Change from April 2020	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Belgium	1.068	5,0	963	4,0	1.055	5,2	10%	31%
Bulgaria	837	0,3	189	0,1	540	0,3	185%	329%
Cyprus	40	0,3	21	0,1	38	0,3	82%	100%
Denmark	104.636	46,8	125.005	44,5	85.436	36,7	-32%	-18%
Estonia	10.553	2,5	5.606	1,6	5.188	1,7	-7%	7%
France	15.422	51,7	9.781	31,0	13.180	45,5	35%	47%
Italy	8.111	31,7	5.853	20,7	5.784	26,0	-1%	26%
Latvia	6.506	1,1	4.821	1,0	4.584	0,9	-5%	-10%
Lithuania	183	0,1	309	0,1	262	0,1	-15%	-10%
Netherlands	39.519	48,6	26.384	32,6	19.966	25,6	-24%	-21%
Poland	14.686	3,7	14.991	3,1	6.210	1,4	-59%	-57%
Portugal	5.969	18,6	4.611	13,0	8.140	21,1	77%	62%
Spain	53.575	153,5	40.999	96,4	49.835	128,6	22%	33%
Sweden	17.145	7,2	16.967	7,1	1.658	3,2	-90%	-55%
Norway	274.564	260,6	314.711	233,3	255.712	208,1	-19%	-11%
United Kingdom	18.573	42,6	11.877	18,5	24.143	31,7	103%	72%

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 29 of 2021)** are available via the EUMOFA website, and can be accessed **here**.

The most recent monthly first-sales data **for May 2021** are available via the EUMOFA website, and can be accessed **here**.

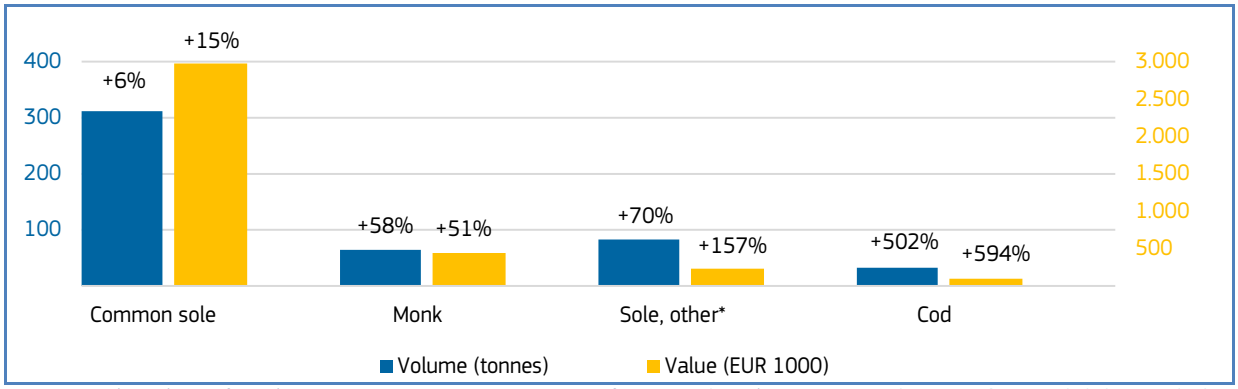
1.3. First sales in selected countries

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

Table 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES[4] IN BELGIUM**

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Apr 2021 vs Jan-Apr 2020	EUR 18 million, -11%	4.407 tonnes, +2%	**Value**: common sole **Volume**: gurnard, European plaice, cod.	Cod recorded significant increases in first-sales value and volume in April 2021 compared to April 2020. The production recorded in April 2021 (around 32 tonnes) is similar to that registered in April 2018 (around 30 tonnes) but is slightly higher than the level registered in April 2019 (around 18 tonnes). The bulk of the production occurred during the October-November period (around 166 tonnes in 2020, 150 tonnes in 2019, 140 tonnes in 2018). The extremely low level of production in April 2020 (around 5 tonnes) is mostly due to changes in fishing strategies caused by the closure of the HORECA sector in Belgium and across the EU as a result of the COVID pandemic. This significantly limited the outlets for cod.
Apr 2021 vs Apr 2020	EUR 5,2 million, +31%	1.055 tonnes, +10%	Common sole, monk, other soles* (other than common sole), cod.	

Figure 1. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM, APRIL 2021**



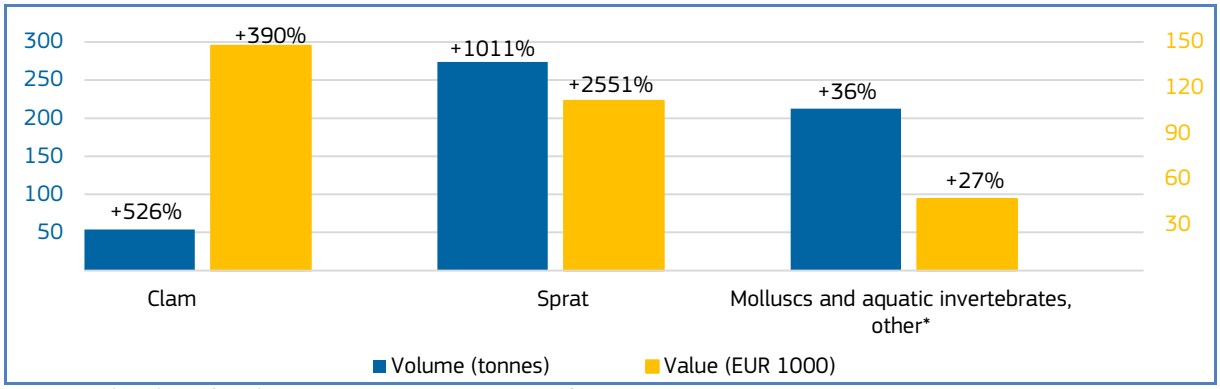
*Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies).*

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2021 vs Jan-Apr 2020	EUR 0,6 million, +66%	720 tonnes, +121%	Sprat, clam, other molluscs and aquatic invertebrates*.
Apr 2021 vs Apr 2020	EUR 0,3 million, +329%	540 tonnes, +185%	Clam, sprat, other molluscs and aquatic invertebrates.

[3] First-sales data updated on 16.6.2021.
[4] Data on fisheries and aquaculture products have been aggregated by EUMOFA to allow comparisons along the different supply chain stages.

Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA, APRIL 2021**

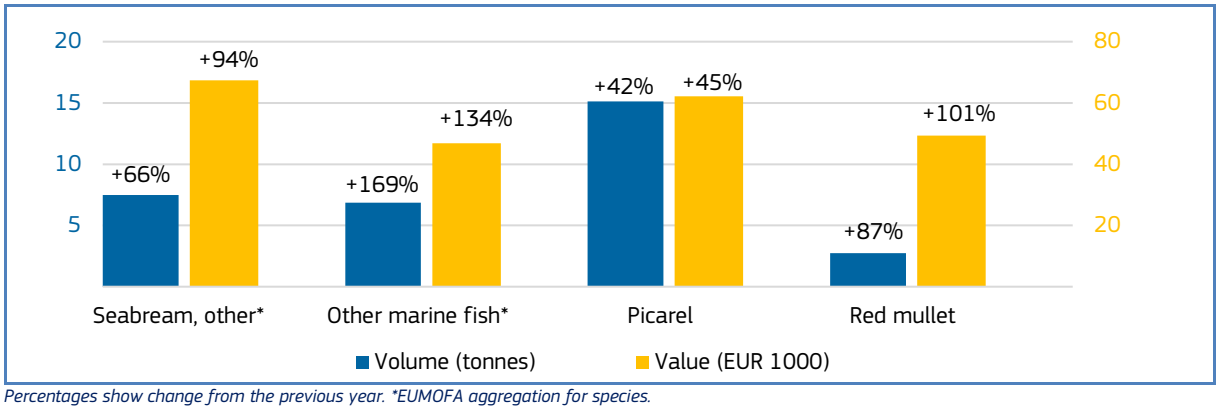


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2021 vs Jan-Mar 2020	EUR 0,9 million, +23%	127 tonnes, +29%	Other seabreams (other than gilthead seabream)*, picarel, squid, other marine fish*.
Mar 2021 vs Mar 2020	EUR 0,3 million, +100%	38 tonnes, +82%	Other seabreams (other than gilthead seabream), other marine fish*, red mullet, picarel.

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS, APRIL 2021**

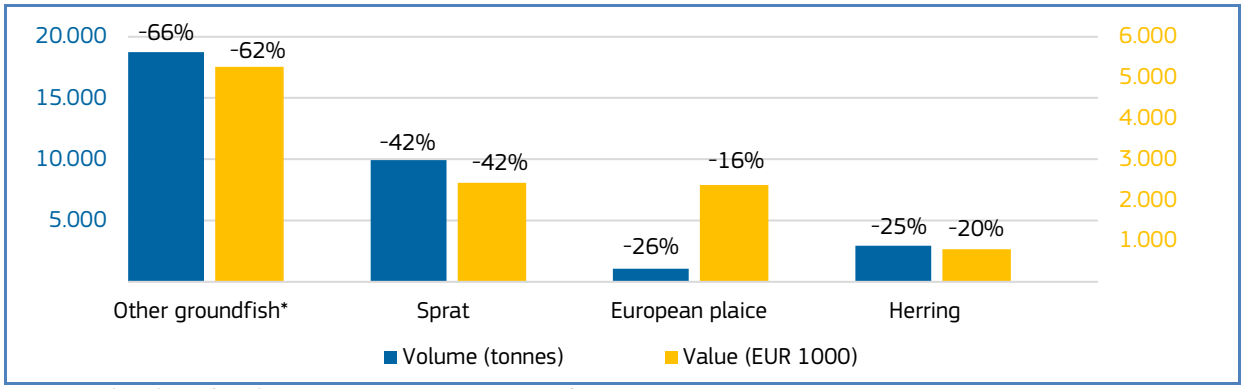


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2021 vs Jan-Apr 2020	EUR 122,5 million, -9%	270.069 tonnes, -5%	Other groundfish*; mackerel, sprat, other marine fish*, herring.
Apr 2021 vs Apr 2020	EUR 36,7 million, -18%	85.436 tonnes, -32%	Other groundfish, sprat, European plaice, herring.

Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, APRIL 2021**

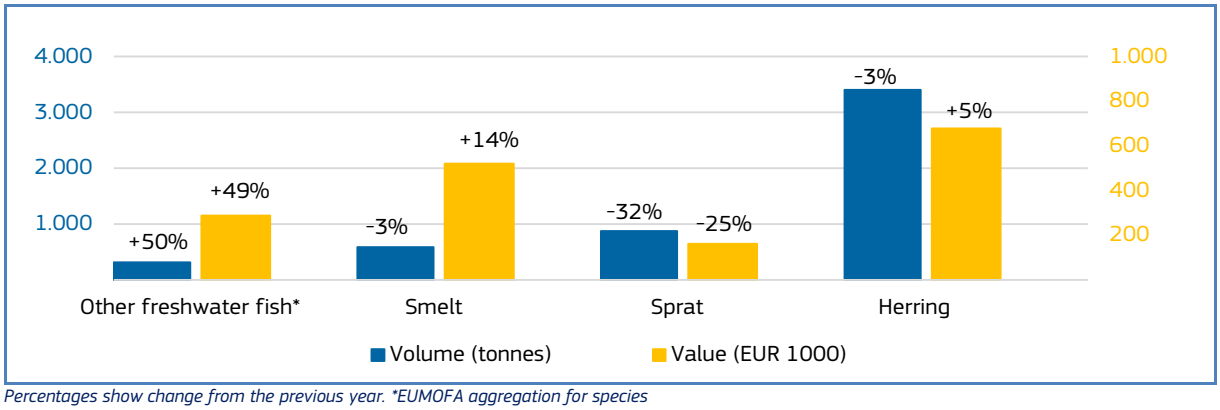


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2021 vs Jan-Apr 2020	EUR 7,1 million, +17%	29.669 tonnes, +31%	Herring, sprat.
Apr 2021 vs Apr 2020	EUR 1,7 million, +7%	5.188 tonnes, -7%	**Value**: other freshwater fish, smelt, herring. **Volume**: sprat, herring.

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, APRIL 2021**

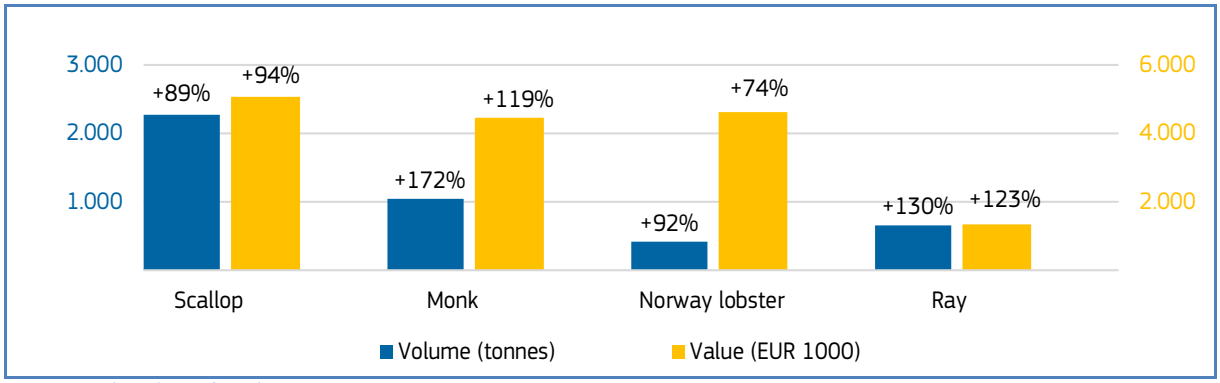


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Apr 2021 vs Jan-Apr 2020	EUR 187 million, +15%	55.870 tonnes, +15%	Scallop, Norway lobster, monk, John Dory, ray.	The increase in first sales of monk in April 2021 is mainly due to an abrupt distortion in 2020 that is mainly related to the first wave of the COVID-19 and the measures adopted. In addition, the biological status of the monkfish stocks is good' for all of the fishing grounds where French vessels operate.
Apr 2021 vs Apr 2020	EUR 45,5 million, +47%	13.180 tonnes, +35%	Scallop, Norway lobster, monk, ray, sardine.	

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, APRIL 2021**

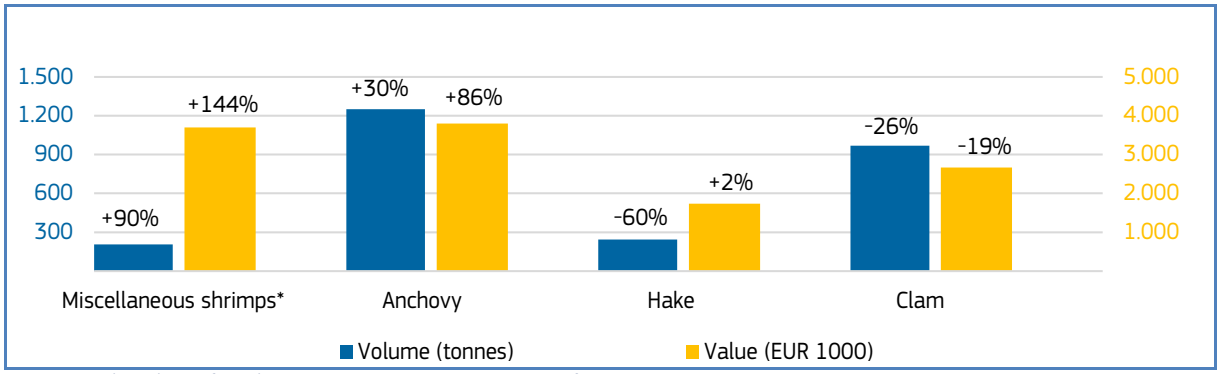


Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2021 vs Jan-Apr 2020	EUR 95,5 million, +12%	22.412 tonnes, 0%	**Value**: anchovy, miscellaneous shrimps*, sardine, red mullet. **Volume**: anchovy, sardine, clam, hake.
Apr 2021 vs Apr 2020	EUR 26 million, +26%	5.784 tonnes, -1%	**Value**: miscellaneous shrimps*, anchovy. **Volume**: hake, clam, cuttlefish.

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, APRIL 2021**

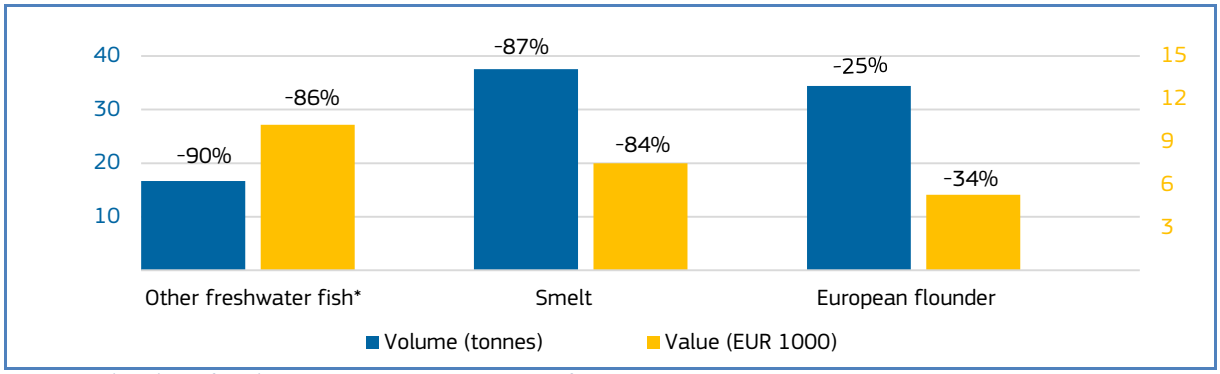


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2021 vs Jan-Apr 2020	EUR 4,3 million, +19%	20.811 tonnes, +14%	Herring, other marine fish*.
Apr 2021 vs Apr 2020	EUR 0,9 million, -10%	4.584 tonnes, -5%	Other freshwater fish*, smelt, European flounder.

Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, APRIL 2021**

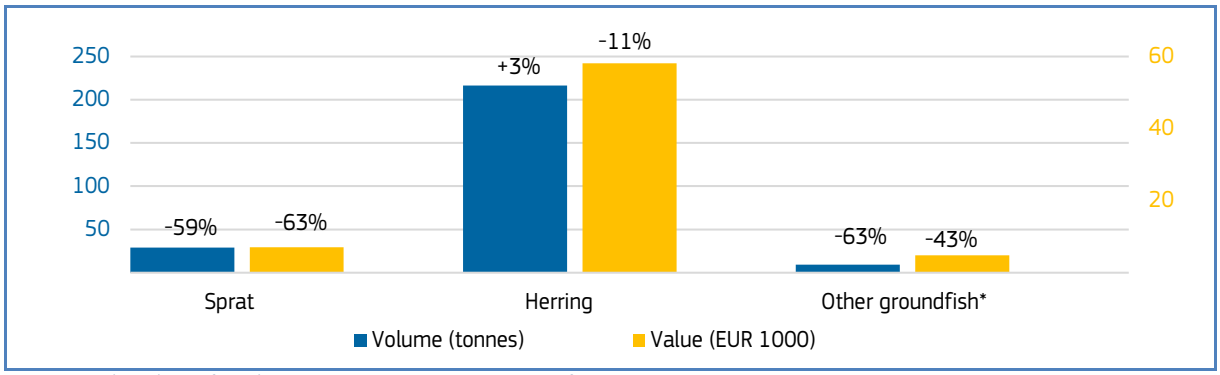


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Lithuania	**First-sales value / trend %**	**First-sales volume/ trend %**	**Main contributing species**	**Notes**
Jan-Apr 2021 vs Jan-Apr 2020	EUR 0,7 million, +56%	1.286 tonnes, +34%	Smelt, herring.	The decrease in first sales of MCS grouping "Other groundfish" was mainly due to **Gobies nei**. Its fishery is seasonal and lasts from April to June. In April 2021 sea temperatures were lower than in April 2020, which affected habitats of Gobies nei during that period. As a consequence of lower temperatures, the Gobies nei were not concentrated in coastal areas and the catches were reduced. Market demand was higher than supply, meaning that prices increased significantly.
Apr 2021 vs Apr 2020	EUR 0,1 million, -10%	262 tonnes, -15%	Sprat, herring, other groundfish*.	

Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, APRIL 2021**

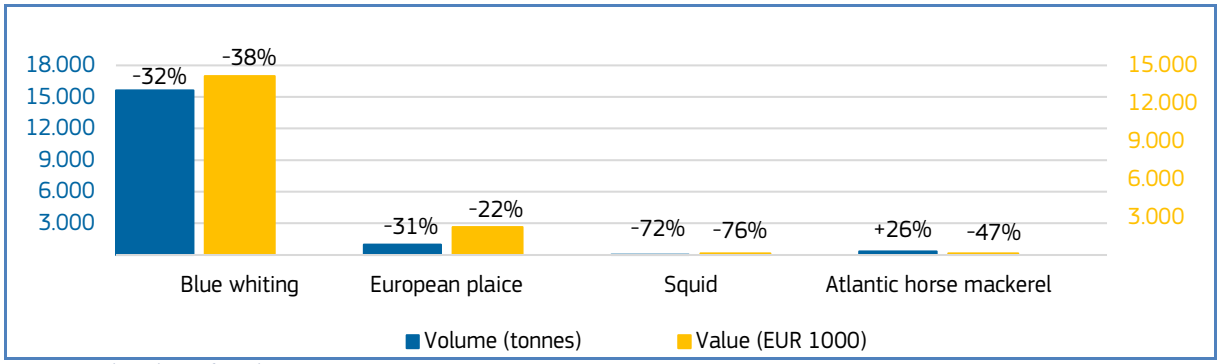


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2021 vs Jan-Apr 2020	EUR 88,7 million, -22%	65.833 tonnes, -18%	Mackerel, herring, blue whiting, shrimp *Crangon* spp., sprat.
Apr 2021 vs Apr 2020	EUR 25,6 million, -21%	19.966 tonnes, -24%	Blue whiting, European plaice, squid, Atlantic horse mackerel.

Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, APRIL 2021**

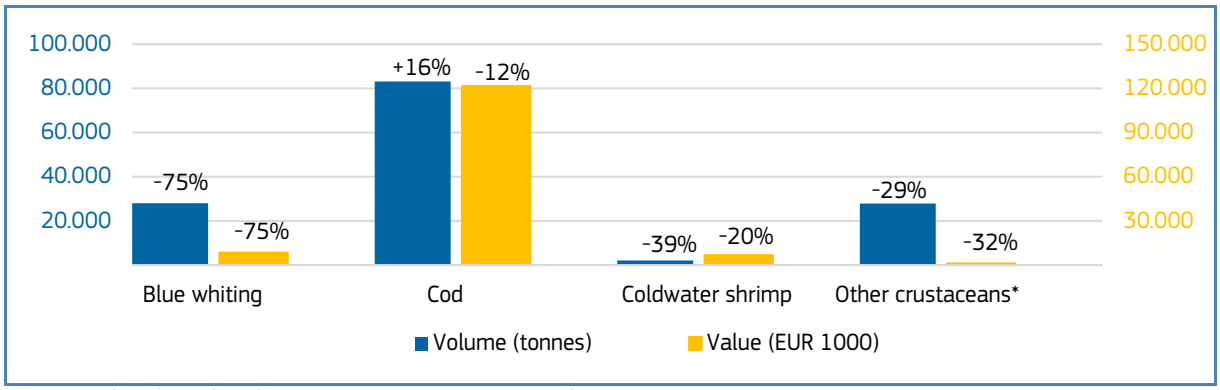


Percentages show change from the previous year.

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2021 vs Jan-Apr 2020	EUR 1.03 billion, -9%	1.220 million tonnes, -2%	Cod, blue whiting, mackerel, coldwater shrimp.
Apr 2021 vs Apr 2020	EUR 208,1 million -11%	255.712 tonnes, -19%	Blue whiting, cod, coldwater shrimp, other crustaceans*.

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, APRIL 2021**

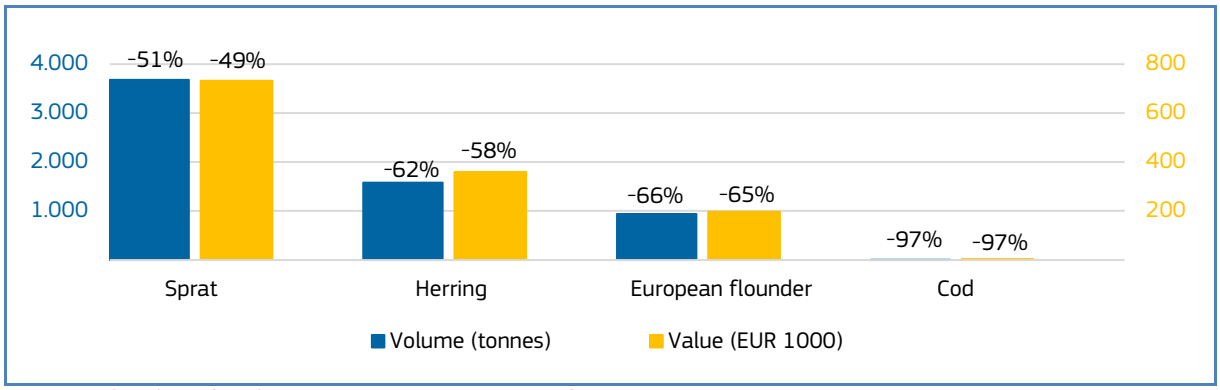


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Apr 2021 vs Jan-Apr 2020	EUR 10,8 million, -16%	47.891 tonnes, -14%	Herring, European flounder, cod, other groundfish*, sprat.	One of the reasons for the high decrease in first sales of **herring** in April 2021 is the reduction of the total allowable catches[5] for herring for the Polish fleet operating in multiple regions. The TACs were reduced by 43% relative to 2020. Additionally, local herring suppliers are thought to have provided fish to the foreign market, with such sales not included in Poland's first-sales data. As catches of **sprat** and herring in the Baltic Sea region are always mixed, local suppliers have probably provided sprat to the foreign market as well as other species mixed with herring in catches. Drastic decreases in first-sales value and volume might indicate the decrease in the Polish market demand.
Apr 2021 vs Apr 2020	EUR 1,4 million -57%	6.210 tonnes, -59%	Sprat, herring, European flounder, cod.	

Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, APRIL 2021**



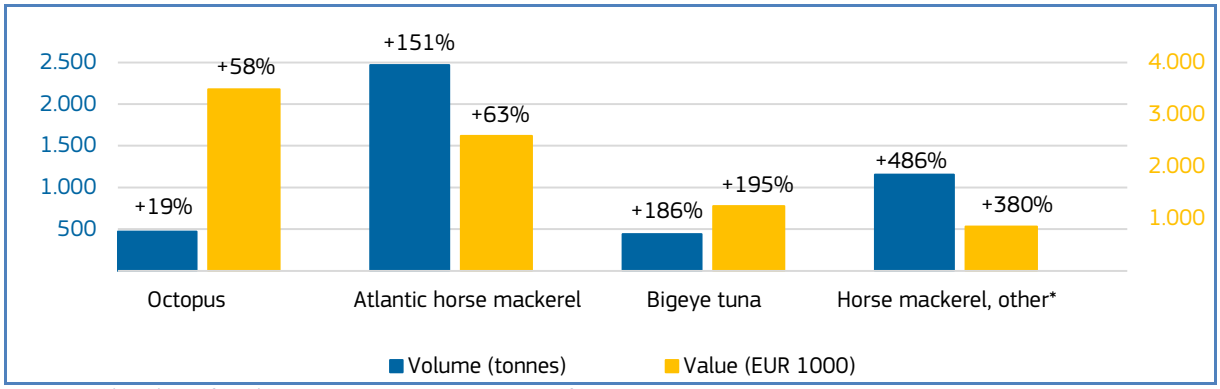
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Apr 2021 vs Jan-Apr 2020	EUR 72,7 million, +20%	22.290 tonnes, +20%	Octopus, swordfish, Atlantic horse mackerel, other horse mackerel* (other than Atlantic horse mackerel), clam.	High increase in first sales of **other horse mackerel*** (other than Atlantic horse mackerel) were due to good biological status, and higher market demand combined with a successful fishing campaign[6]. The high sales of bigeye tuna in April 2021 were due to abrupt distortion in 2020, which is mainly related to the first wave of the COVID-19 and the restrictive measures applied.
Apr 2021 vs Apr 2020	EUR 21,1 million +62%	8.140 tonnes, +77%	Octopus, Atlantic horse mackerel, bigeye tuna, other horse mackerel (other than Atlantic horse mackerel).	

[5] Council Regulation (EU) 2020/1579 https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX:32020R1579
[6] https://www.dgrm.mm.gov.pt/documents/20143/124680/DATAPESCAS+N%C2%BA+128+-+janeiro+a+mar%C3%A7o+2021.pdf/031abbd4-e9b1-3bd3-75d7-c6338574be2f (page 7, see "carapau")

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, APRIL 2021**

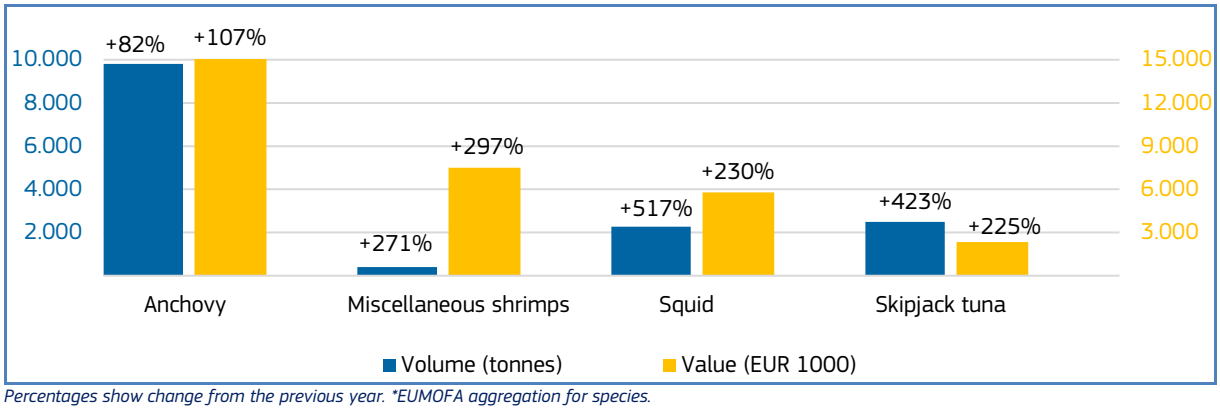


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Spain	First-sales value / trend in %	First-sales volume / trend %	Main contributing species
Jan-Apr 2021 vs Jan-Apr 2020	EUR 422,1 million, +3%	154.232 tonnes, -1%	**Value**: anchovy, swordfish, squid, deep-water rose shrimp. **Volume**: mackerel, skipjack tuna, Atlantic horse mackerel.
Apr 2021 vs Apr 2020	EUR 128,6 million +33%	49.835 tonnes, +22%	Anchovy, miscellaneous shrimps*, squid, skipjack tuna.

Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, APRIL 2021**

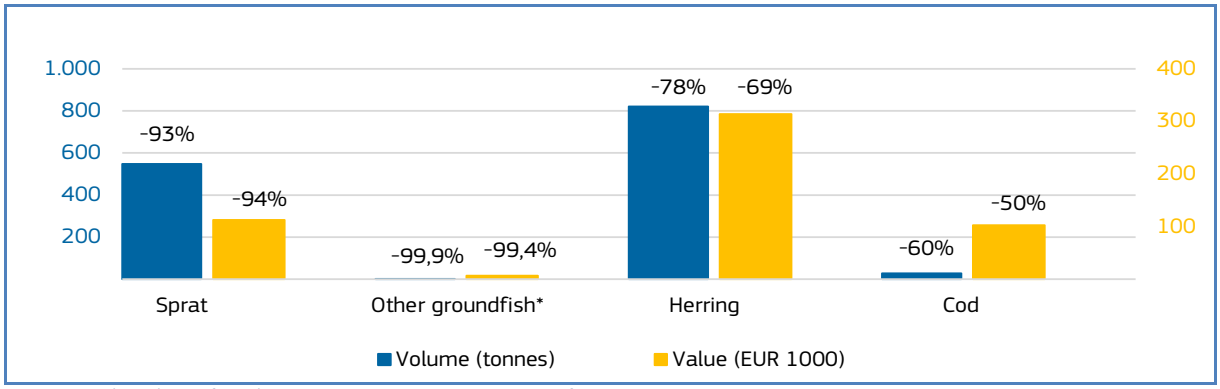


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Sweden	First-sales value / trend in %	First-sales volume / trend in %	Main contributing species	Notes
Jan-Apr 2021 vs Jan-Apr 2020	EUR 21,3 million, -15%	49.141 tonnes, -16%	Other groundfish*, coldwater shrimp, herring.	In MCS grouping "Other groundfish", sandeels were found to be primarily responsible for decreases in first sales. It is noticeable that sandeels quota in 2021[7] was reduced by 63% relative to 2020. It was observed that in April 2020, 67% of the Swedish fleet's catches of sandeels were most likely sold in Sweden, while sales in April 2021 were 0%. The reason behind the lack of sandeel sales is not clear. One of reasons for a significant reduction of sales of sprat in 2021 might be a reduction of sprat quotas by 24%[8]. Between February and April 2021, sprat sales decreased by 95%, although this only affected the price by 5%.
Apr 2021 vs Apr 2020	EUR 3,2 million, -55%	1.658 tonnes, -90%	Sprat, other groundfish*, herring, cod.	

Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, APRIL 2021**



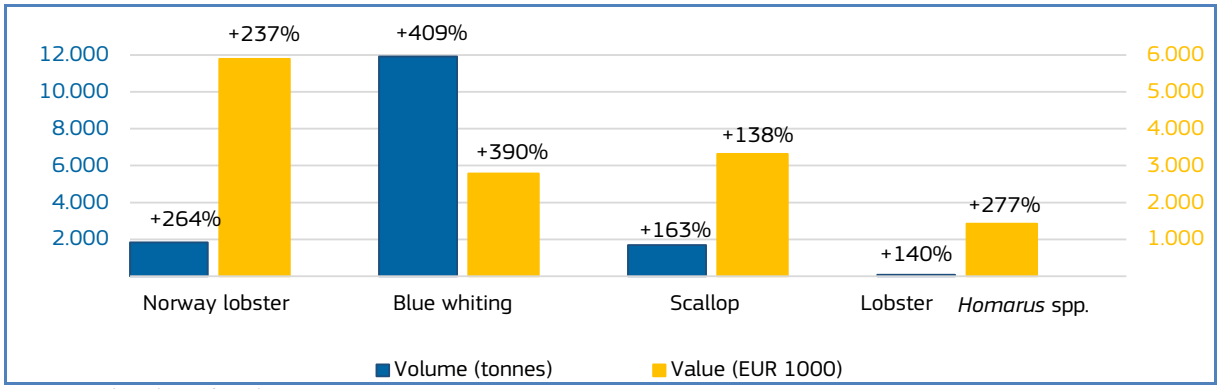
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 18. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM**

The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2021 vs Jan-Apr 2020	EUR 157 million, -1%	110.084 tonnes, +12%	**Value**: mackerel, saithe, cod, hake. **Volume**: blue whiting, Norway lobster, scallop.
Apr 2021 vs Apr 2020	EUR 31,7 million, +72%	24.143 tonnes, +103%	Norway lobster, blue whiting, scallop, lobster *Homarus* spp.

[7] Council Regulation (EU) 2021/703 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32021R0703
[8] Council Regulation (EU) 2020/1579 https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX:32020R1579

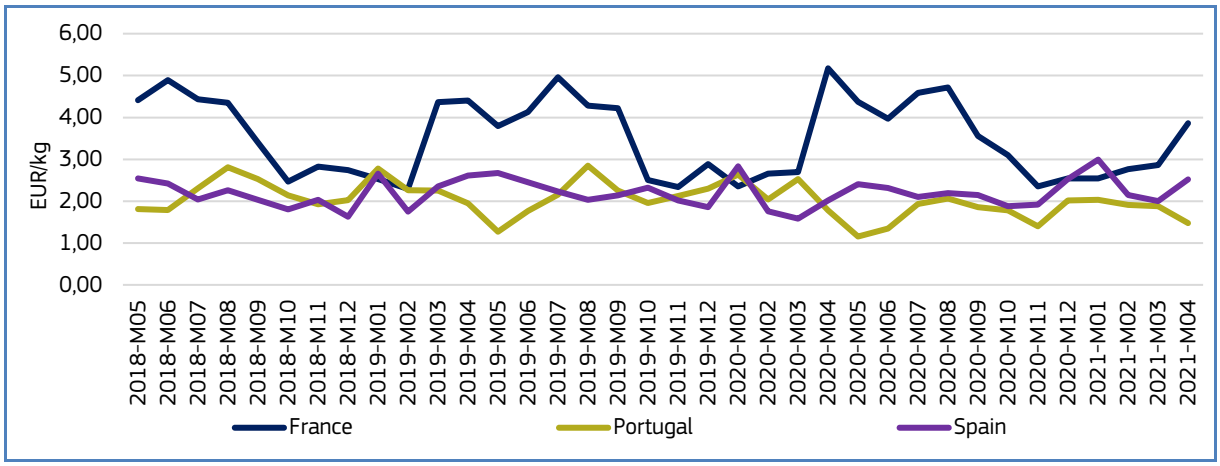
Figure 16. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, APRIL 2021**



Percentages show change from the previous year.

1.4. Comparison of first-sales prices of selected species in selected countries[9]

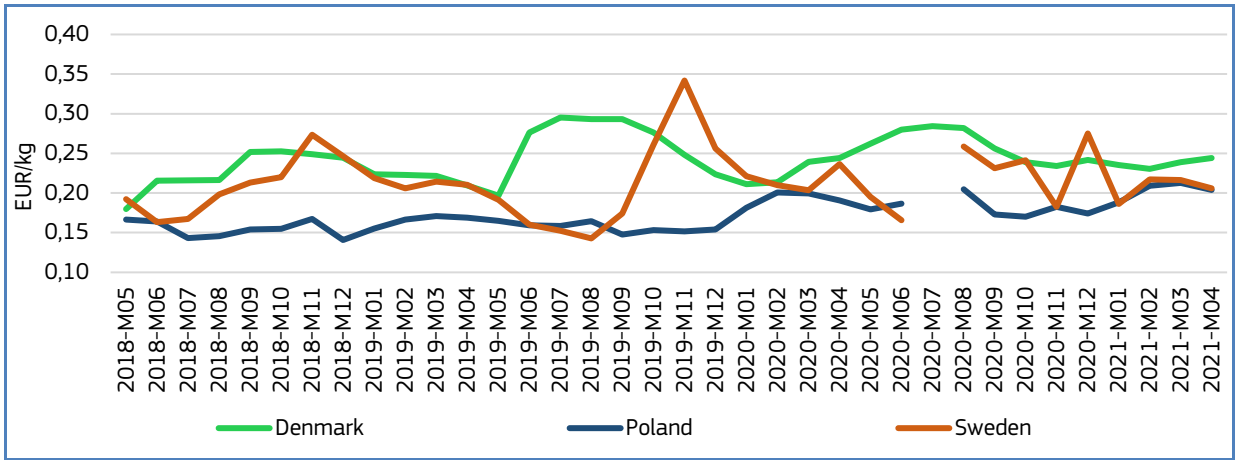
Figure 17. **FIRST-SALES PRICES OF BLACK SEABREAM IN FRANCE, PORTUGAL, AND SPAIN**



EU first sales of **black seabream**[10] occur predominantly in **France**, as well as in **Portugal** and **Spain**. In April 2021 (the most recent available data), the average first-sales prices of black seabream were 3,86 EUR/kg in France (35% up from the previous month and 25% down from the previous year); 1,48 EUR/kg in Portugal (down from both the previous month and year by 21% and 17%, respectively); and 2,52 EUR/kg in Spain (up from both March 2021 and April 2020 by 26% and 25%, respectively). In France, the spikes in price are a result of seasonality, with prices peaking during summer months and falling during the winter months. In April 2021, supply increased in France and Portugal (+41%, and +25% respectively), and decreased in Spain (–9%), relative to the previous year. Volumes sold in the three markets are seasonal, with peaks in January–March in France, May and October in Portugal, and February in Spain. Over the past 36 months, black seabream prices have remained stable in Spain but have descended in France and Portugal. At the same time, supply demonstrated a downward trend in Portugal and Spain, and an upward trend in France.

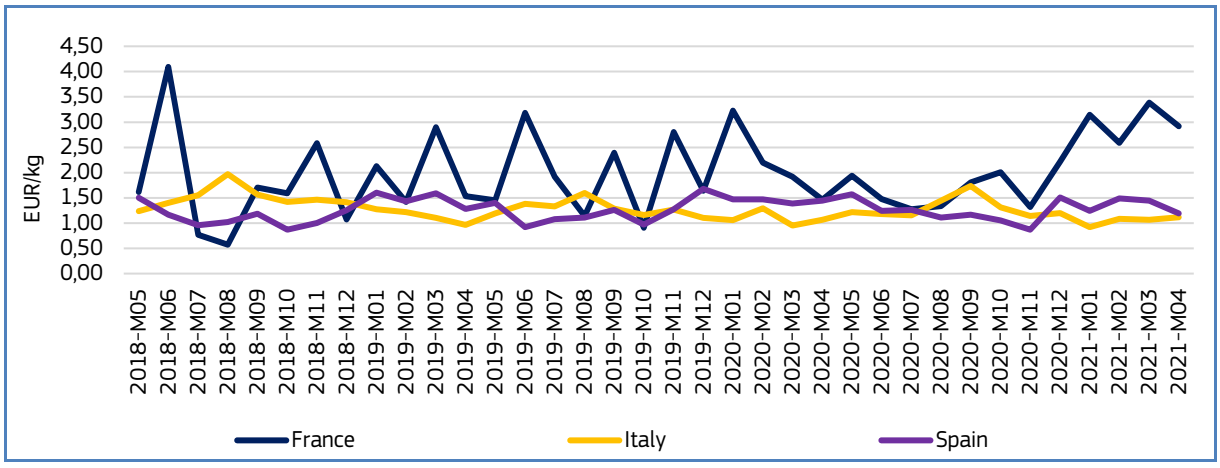
[9] First sales data updated on 16.6.2021.
[10] Black seabream (*Spondyliosoma cantharus*) is a species included in the "Seabream, other" main commercial species (ERS code: BRB).

Figure 18. **FIRST-SALES PRICES OF EUROPEAN SPRAT IN DENMARK, POLAND, AND SWEDEN**



EU first sales of **European sprat**[11] occur predominantly in **Denmark**, as well as in **Poland** and **Sweden**. In April 2021, the average first-sales prices of European sprat were: 0,24 EUR/kg in Denmark (2% up from the previous month and unchanged from the previous year); 0,20 EUR/kg in Poland (4% lower than March 2021, and 7% higher than April 2020); and 0,21 EUR/kg in Sweden (down from both the previous month and year by 5% and 13%, respectively). Prices converge in all three countries, and they range from: 0,20-0,30 EUR/kg (Denmark); 0,14-0,21 EUR/kg (Poland), and 0,14-0,34 EUR/kg (Sweden). In Sweden, the price spikes did not correlate with drops in supply from the previous month. In April 2021, supply decreased in all three markets relative to the previous year: –42% in Denmark, –90% in Poland, and –93% in Sweden. Such supply decreases could be the result of restrictive measures linked with the Covid-19 pandemic in early 2020. Supply is seasonal with peaks in August–September in Denmark, and January–March/April in Poland and Sweden. Over the 36-month period, European sprat prices exhibited an upward trend in all three countries. During the same period, supply showed a decreasing trend in Denmark and Poland, and the opposite in Sweden.

Figure 19. **FIRST-SALES PRICES OF MEDITERRANEAN HORSE MACKEREL IN FRANCE, ITALY, AND SPAIN**



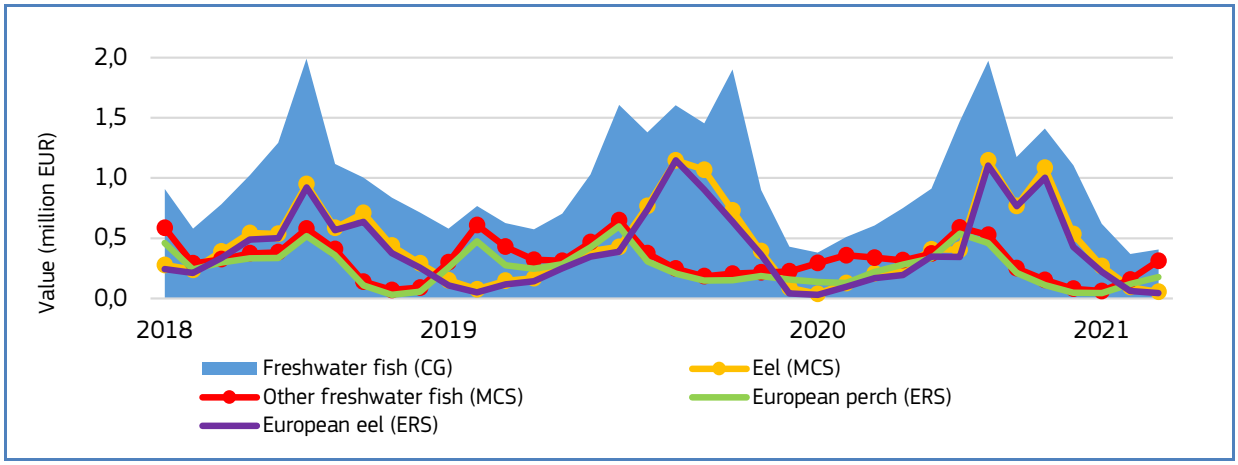
EU first sales of **Mediterranean horse mackerel**[12] occur predominantly in **Spain**, as well as in **France** and **Italy**. In April 2021, the average first-sales prices of Mediterranean horse mackerel were: 2,92 EUR/kg in France (–14% from March 2021, and +99% from April 2020); 1,11 EUR/kg in Italy (up by 4% from both previous month and year); and 1,19 EUR/kg in Spain (down by 18% from both March 2021 and April 2020). In April 2021, supply increased in all three countries: +8% in France, +101% in Italy, and +6% in Spain, compared to April 2020. Volumes sold in the three markets are seasonal with different peaks: December–February in France, April–May in Italy, and June–August in Spain. Over the past three

[11] European sprat (*Sprattus sprattus*) is a species included in the "Sprat (= Brisling)" main commercial species (ERS code: SPR).
[12] Mediterranean horse mackerel (*Trachurus mediterraneus*) is a species included in the "Horse mackerel, other" main commercial species ERS code: HMM.

years, prices exhibited an upward trend in France and Spain, and the opposite in Italy. At the same time, supply went up in France, and showed a downward trend in Italy and Spain.

1.5. Commodity group of the month: freshwater fish[13]

Figure 20. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES[14], MAY 2018 – APRIL 2021**



The "**freshwater fish**" commodity group (CG[15]) recorded the ninth highest first-sales value and volume out of the 10 CGs recorded in April 2021[16]. Of reporting countries covered by the EUMOFA database, first sales of freshwater fish reached a value of EUR 406.000 and a volume of 357 tonnes, representing a value increase of 6% and a volume decrease of 14% compared to April 2020.

In the past 36 months, the highest first-sales value of freshwater fish was registered at EUR 2,0 million (October 2018).

Freshwater fish includes six main commercial species (MCS): carp, eel, freshwater catfish, pike, pike-perch, and other freshwater fish[17].

At Electronic Recording and Reporting System (ERS) level, European eel (11%) and European perch (44%) together accounted for 54% of the "freshwater fish" total first-sales value recorded in April 2021.

[13] First sales data updated on 16.6.2021.
[14] Norway and the UK excluded from the analyses.
[15] Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies
[16] More data on commodity groups can be found in Table 1.2 of the Annex.

1.6. Focus on European eel

European eel (*Anguilla anguilla*) is a catadromous fish born at sea that migrates to inland freshwater environments. The species is widely distributed from seas in the north-west of Russia and Finland to the coasts of Morocco, Egypt, and the Mediterranean and Black Sea. European eel spawns in the Sargasso Sea in the middle of the North Atlantic, after which the larvae migrate to the coasts of Europe by drifting on the Gulf Stream and turn to the "glass eel" stage. They spend most of their lifetime (at least 6 to 20 years) in freshwater rivers, streams, and estuaries - a period known as the "yellow eel" stage. The species can live for over 80 years and reach up to 130 cm in length, although the average length of adults is 60-80 cm, with a weight of 1-2 kg[18]. The mature adult eels are known as "silver eels".

The European eel is listed as 'critically endangered' by the International Union for Conservation of Nature (IUCN)[19]. In 2009, the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) added European eels to its Appendix II list of species for which trade must be monitored and regulated. As a result, any international trade of this species must be approved by a permit[20]. Given the critical status of the European eel stock as confirmed by recurrent scientific advice, the EU Member States decided in December 2010 not to allow any international trade of this species and that trade regime has been renewed on a yearly basis[21]. However, the internal marketing of this species within the EU is allowed.

In 2007, the EU adopted the Eel Regulation[22] which provides a framework for the recovery of European eel stocks and its sustainable use. Under this Regulation, EU countries must implement eel management plans for the recovery the stock. These plans include measures to restrict fishing and other human activities that kill European eels, to combat predators, and to implement other measures related to aquaculture and/or environment, as well as restocking activities. Since 2018, a three-month fishing closure has been introduced at the EU level via the annual regulation setting the fishing quotas. Currently, this measure applies to commercial and recreational fishing for eels at all life stages in marine and brackish waters of the Atlantic, North and Baltic Seas, as well as the Mediterranean

Eel production is mainly driven by aquaculture, based on glass eel caught in wild fisheries using diverse gear: trawls, electric fishing, spears, traps and pots, hooks, weirs, rakes, pound nets, fyke nets, and others[23]. Data on a share of fished glass eels that goes for aquaculture is not available on EUMOFA. Fisheries of juvenile European eel, known as glass eels, are concentrated along the Atlantic coasts of Portugal, Spain, France, Morocco, and the Bristol Channel in the UK.

It must be taken into consideration that reported of first sales datasets of European eel available on EUMOFA do not allow a distinction between glass eel, yellow eel and silver eel. In this report landings datasets are not analysed.

We have covered **European eel** in the following *Monthly Highlights*:
First sales: MH 7/2020 (Italy, Spain, Sweden), MH 7/2019 (Denmark, Poland), MH 11/2016 (Denmark),

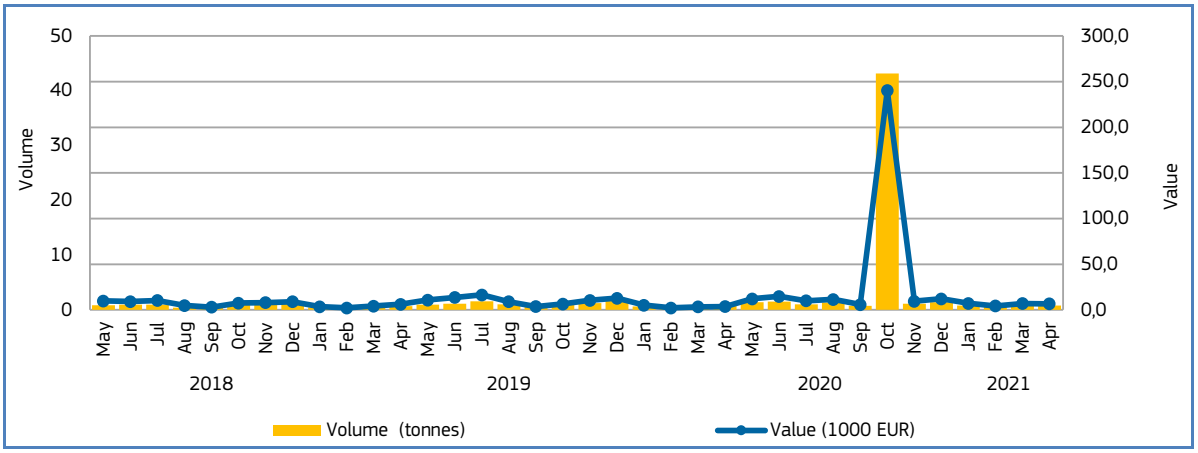
[18] https://ec.europa.eu/oceans-and-fisheries/ocean/marine-biodiversity/eel_en
[19] https://www.iucnredlist.org/species/pdf/45833138
[20] https://www.cites.org/eng/app/appendices.php
[21] Based on the decision in the Scientific Review Group established under the EU Wildlife Trade Regulations implementing CITES in the EU.
[22] Council Regulation (EC) No 1100/2007 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32007R1100
[23] http://www.fao.org/fishery/species/2203/en

Selected countries

Table 19. **COMPARISON OF EUROPEAN EEL FIRST-SALES PRICES[24], MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF FRESHWATER FISH IN SELECTED COUNTRIES**

European eel		Changes in European eel first sales Jan-Apr 2021 (%)		Contribution of European eel to total freshwater fish first sales in April 2021 (%)	Principal places of sale Jan-Apr 2021 in terms of first-sales value
		Compared to Jan-Apr 2020	Compared to Jan-Apr 2019		
France	**Value**	+74%	+56%	55%	Le Grau-du-Roi, La Rochelle, Arcachon.
	Volume	+31%	+71%	32%	
The Netherlands	**Value**	-9%	-47%	18%	IJmuiden/Velsen, Stellendam, Scheveningen.
	Volume	-16%	-43%	10%	
Poland	**Value**	N/A	N/A	0%	No first sales reported from January to April 2021.
	Volume	N/A	N/A	0%	

Figure 21. **EUROPEAN EEL: FIRST SALES IN FRANCE, MAY 2018 - APRIL 2021**



Over the past 36 months, the highest first-sales volume of European eel in **France** occurred in October 2020, when 43 tonnes were sold. If we exclude this unusual exception in October 2020, in the observed period volume mainly ranged from 0,2 tonnes in February 2020 to 1,9 tonnes December 2019. Commercial fisheries in the Atlantic area target glass eel and yellow eel, while silver eel is allowed only in some freshwaters. In the Mediterranean area commercial fisheries target yellow and silver eel in freshwaters and the sea

[24] First sales average price differ for different eel life stages – in general average value would be different in a country who has glass eels fishery than the one without it.

Figure 22. **EUROPEAN EEL: FIRST SALES IN FRANCE, MAY 2018 - APRIL 2021**

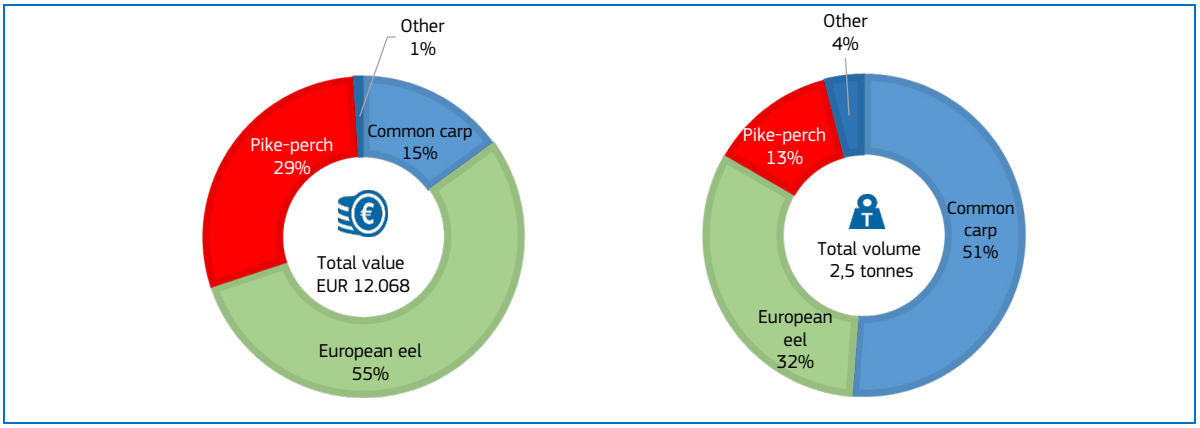
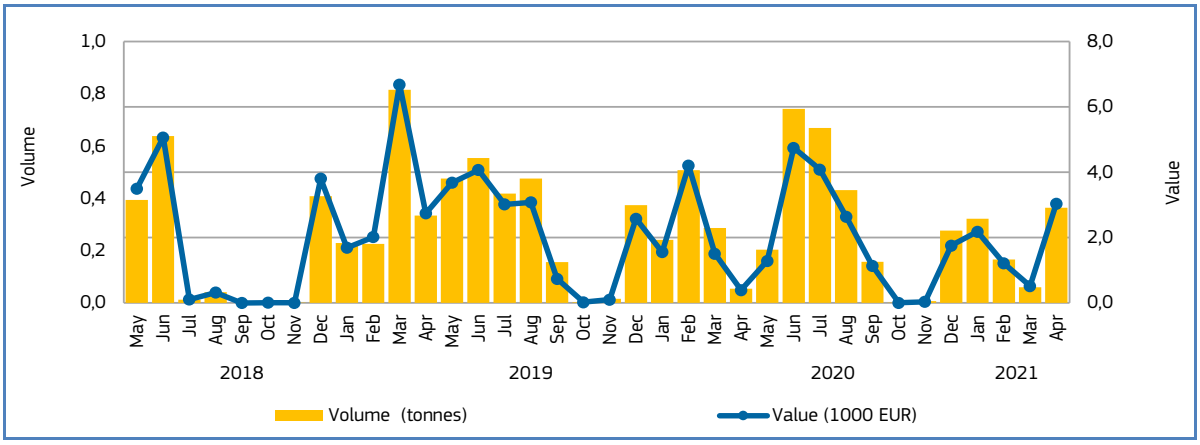


Figure 23. **EUROPEAN EEL: FIRST SALES IN THE NETHERLANDS, MAY 2018 - APRIL 2021**



Over the past 36 months in **the Netherlands**, the highest first-sales volume of European eel was in March 2019 when 813 kg of mainly yellow eel were sold. The Netherlands implemented eel closure periods with its Eel Management Plan in 2009. The closed season for all eel fisheries is from 1 September to 1 December (3 months)[25]. However, since 2011 there is an exception for Frisian inland water area where a quota system of 36,6 tonnes annually was introduced, regardless of the season[26].

[25] The Netherlands eel management plan, https://edepot.wur.nl/4260?_ga=2.5026938.89114122.1623923831-1398020519.1623923831
[26] Annual three-month eel fshing closures, 2021. The Fisheries Secretariat (FishSec), Sweden. http://www.fishsec.org/app/uploads/2021/06/FishSec-eel-closures-report-2021-final.pdf

Figure 24. **FIRST SALES: COMPOSITION OF FRESHWATER FISH" (ERS LEVEL) IN THE NETHERLANDS IN VALUE AND VOLUME, APRIL 2021**

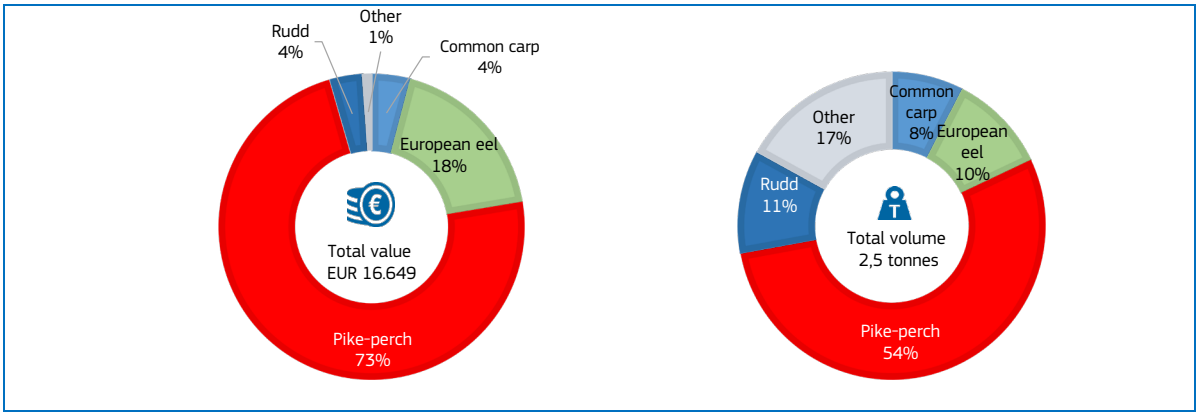
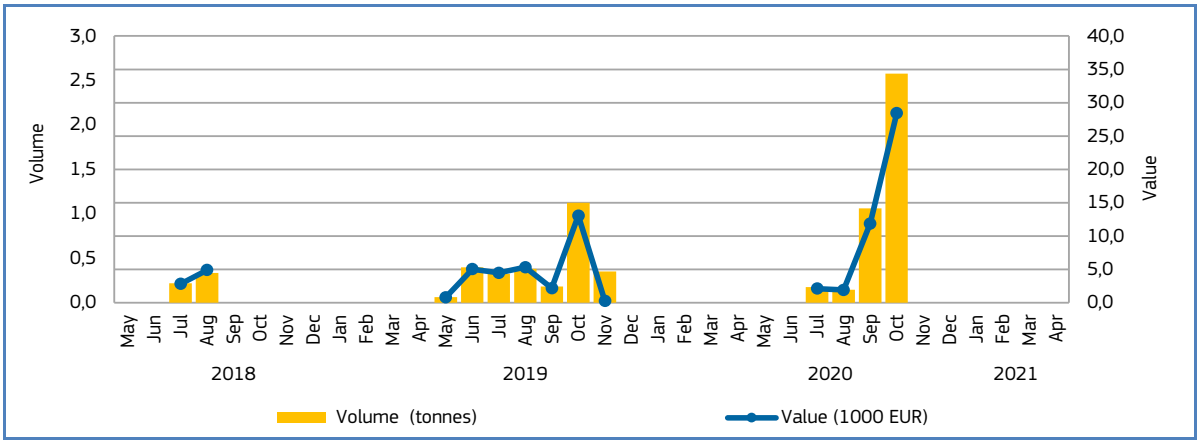


Figure 25. **EUROPEAN EEL: FIRST SALES IN POLAND, MAY 2018 – APRIL 2021**



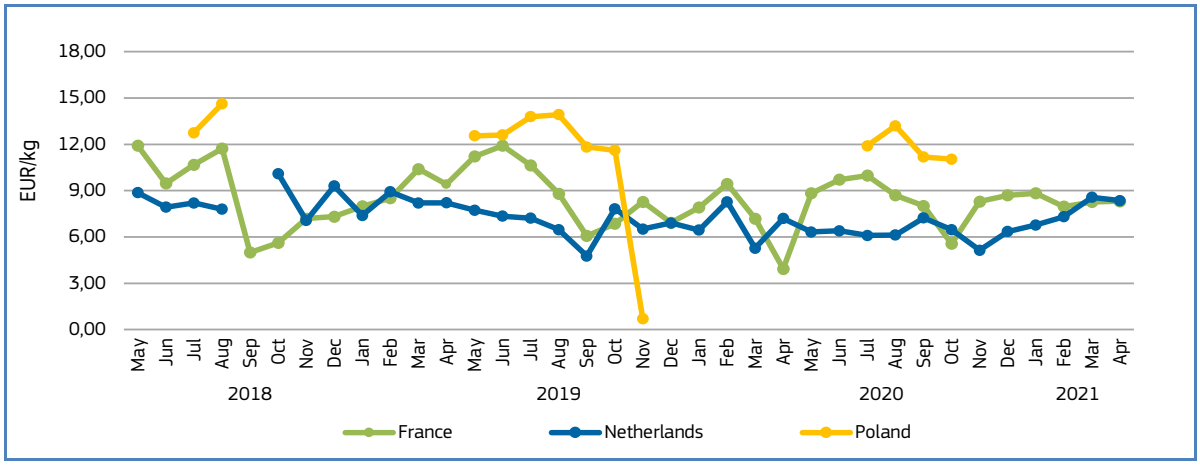
In **Poland** from May 2018 to April 2021, the highest first-sales volume was recorded in October 2020 when 2,6 tonnes were sold. Over the observed 36-month period, sales of European eels were recorded in July-August 2018, May-November 2019 and July-October 2020. There were no first sales in the remaining months due to fishery restrictions and biological patterns that render the species unavailable a number of months. There were closure periods in coastal waters from 1 November 2020 to 31 January 2021, and in freshwaters from 1 December to 31 March[27].

In Poland in April 2021, there were no recorded first sales of species from the freshwater fish Commodity Group.

[27] Ibid.

Price trend

Figure 26. **EUROPEAN EEL: FIRST-SALES PRICES IN SELECTED COUNTRIES, MAY 2018 - APRIL 2021**



Over the 36-month observation period (May 2018 to April 2021), the weighted average first-sales price of European eel in **Poland** was 11,32 EUR/kg, 65% higher than in **France** (6,84 EUR/kg), and 55% greater than in **the Netherlands** (7,31 EUR/kg). According to first sales data available on EUMOFA, average prices refer to European eel without indication on the life stage of eel which can be either the most valued glass eel, or less valued silver eel and yellow eel. Based on available analysed first sales data and average first-sales prices reported by the concerned countries, the main assumption is that no glass eel sales have been reported in the observed period.

Among surveyed countries, Poland has the highest weighted average price, but also the lowest overall first-sales volume of eel (silver and yellow eel) in the observed period. The higher first-sales average price in Poland is due to more scarce supply (because there has been no natural recruitment for decades and probably less restocking than in the Netherlands), and higher demand than in France.

In **France** in April 2021, the average first-sales price of European eel (8,32 EUR/kg) more than doubled (+111%) compared to April 2020. Such decline could be the start of covid-19 pandemic in the firsts quarter of 2020 and market disruptions caused by various restrictive measures that affected all levels of supply chain. The average price in April 2021 decreased by 12% compared with April 2019. Over the past 36 months, average price ranged from 3,94 EUR/kg for 925 kg in April 2020, to 11,91 EUR/kg for 830 kg in May 2018.

In **the Netherlands** in April 2021, the average first-sales price of European eel (8,35 EUR/kg) increased by 16% compared to the same month in 2020 and 2% when compared to April 2019. During the observed period, the lowest average price (4,76 EUR/kg for 156 kg) was seen in September 2019, while the highest average prices were recorded in October 2018 at 10,10 EUR/kg for 1 kg, and in December 2018 at 9,30 EUR/kg for 409 kg.

In **Poland** in April 2021, there were no recorded first sales as there were no fisheries in April because the water is too cold and eels do not migrate. During the observed 36-month period, the lowest average price of 0,70 EUR/kg for 325 kg was seen in November 2019, while the highest average price was recorded in August 2018, at 14,63 EUR/kg for 335 kg.

1.7. Focus on European perch

Source: Kohout, Jan, Institute of Animal Physiology and Genetics AS CR - Laboratory of Fish Genetics

The European perch (*Perca fluviatilis*) is a freshwater species, found originally in the temperate waters of the northern hemisphere (Europe and North America), and has been introduced to Australia, New Zealand, and South Africa.

It can be found in some of the brackish waters of the Baltic Sea. A predatory species, juveniles feed on zooplankton, bottom invertebrate fauna, and other perch fry; while adults feed on both invertebrates and fish. It spawns between February and July in the northern hemisphere and between August and October in the southern hemisphere[28].

In Estonia, the species is fished in both Lake Peipus and the Baltic Sea coastal fisheries. Catches are seasonal, occurring mainly in spring and autumn. However, during mild winters, when the water in Pärnu Bay and Lake Peipus does not freeze, the fish can be caught year-round. Fishing is done with fixed gear such as fyke nets and gillnets. The latter are used in autumn and winter, while fyke nets are used in spring and summer.

Fisheries in Lake Peipus are regulated on both input (number of gears, fishing period, mesh size, etc.) and output (minimum size of fish caught), which are determined by the size and composition of the fish stocks. The Baltic Sea fisheries are regulated by the number of nets and the mesh size. In addition, in certain coastal areas fishing is prohibited throughout the year[29].

On the market, the European perch is sold mainly filleted, fresh, and frozen. Most of the catches are processed and exported, mainly to France and Switzerland.

We have covered **European perch** in the following *Monthly Highlights*:
First sales: MH 10/2016 (Estonia)

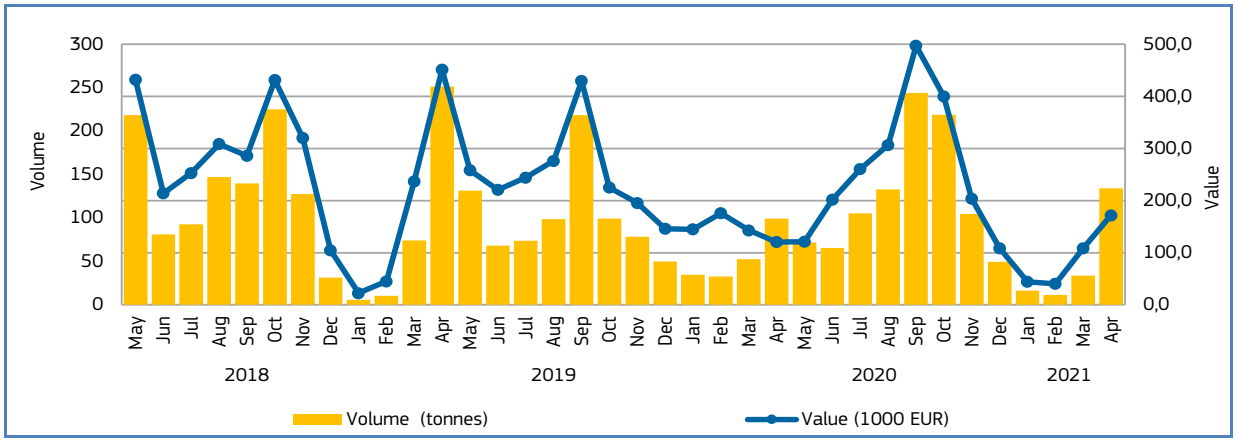
Selected countries

Table 20. **COMPARISON OF EUROPEAN PERCH FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF FRESHWATER FISH IN SELECTED COUNTRIES**

European perch		Changes in European perch first sales Jan-Apr 2021 (%)		Contribution of European perch to total "freshwater fish" first sales in April 2021 (%)	Principal places of sale in Jan-Apr 2021 in terms of first-sales value
		Compared to Jan-Apr 2020	Compared to Jan-Apr 2019		
Estonia	**Value**	-38%	-52%	57%	Lindi, Nasva, Liiva Meierei.
	Volume	-11%	-43%	42%	
Poland	**Value**	-91%	-94%	0%	Swinoujscie, Krynica Morska I.
	Volume	-92%	-93%	0%	
Sweden	**Value**	+64%	+127%	32%	*Data unavailable for Sweden.*
	Volume	+13%	+32%	12%	

[28] http://www.fao.org/fishery/species/2298/en
[29] https://www.riigiteataja.ee/en/eli/513062016002/consolide

Figure 27. **EUROPEAN PERCH: FIRST SALES IN ESTONIA, MAY 2018 – APRIL 2021**



Of surveyed countries, **Estonia** has the highest first-sales value and volume of European perch. Over the observed 36-month period, the highest first sales of European perch occurred in April 2019 (251 tonnes), and September 2020 (244 tonnes). The lowest sales were observed in the colder months, i.e. from January to March, when the fishing conditions are not favourable. In general, first sales fluctuate, with better sales during the warmer months.

Figure 28. **FIRST SALES: COMPOSITION OF FRESHWATER FISH (ERS LEVEL) IN ESTONIA IN VALUE AND VOLUME, APRIL 2021**

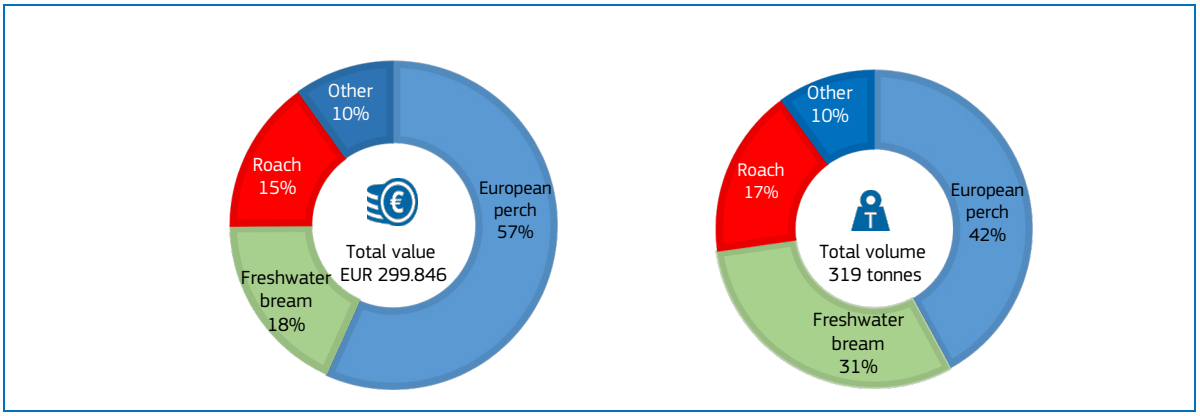
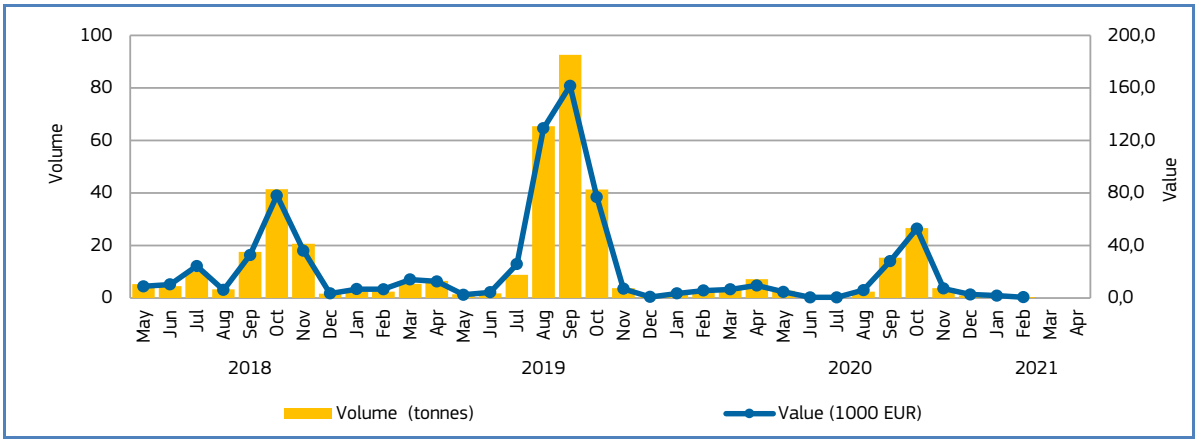
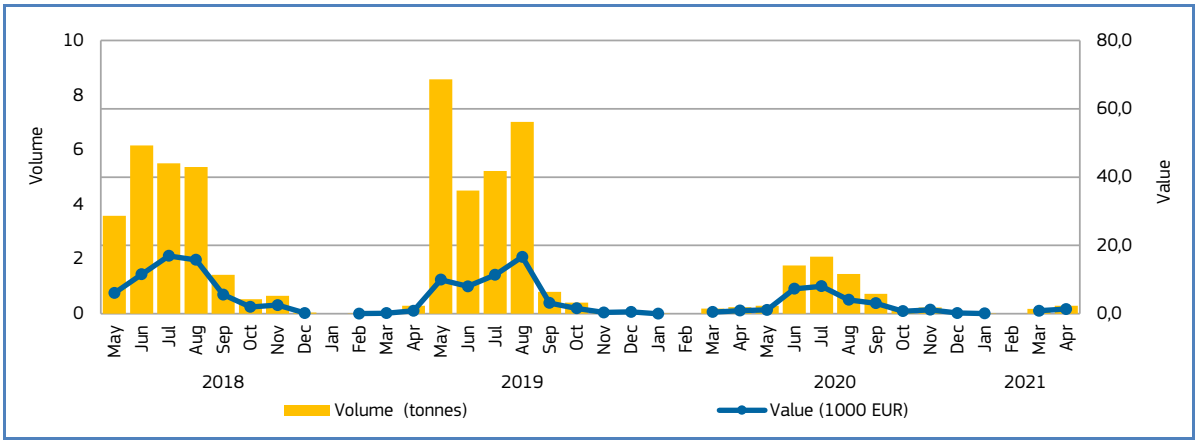


Figure 29. **EUROPEAN PERCH: FIRST SALES IN POLAND, MAY 2018 – APRIL 2021**



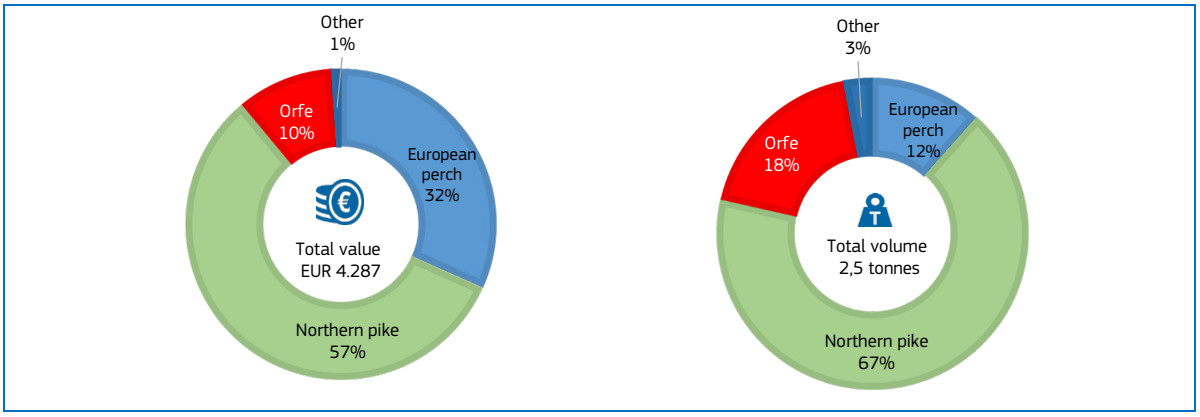
In **Poland** over the past 36 months, there were first-sales peaks during summer and autumn months. The highest first sales volume was recorded in September 2019 when 93 tonnes were sold.

Figure 30. **EUROPEAN PERCH: FIRST SALES IN SWEDEN, MAY 2018 – APRIL 2021**



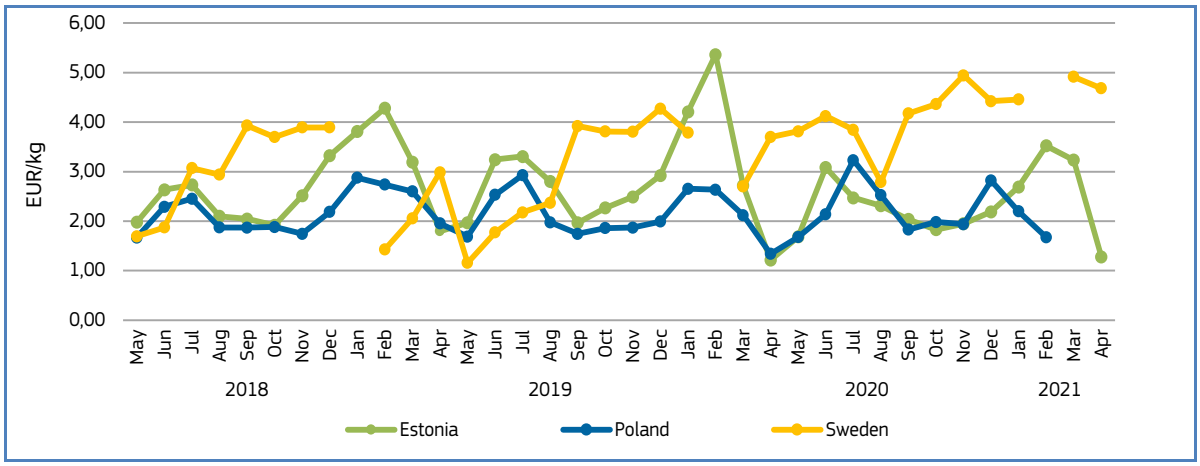
Among surveyed countries, **Sweden** has the lowest first-sales value and volume of European perch. Over the past 36 months, the highest first sales were registered in May 2019, when 9 tonnes were sold. The main fishing season starts in May with the summer peak, and ends in early autumn when sales are negligible.

Figure 31. **FIRST SALES: COMPOSITION OF FRESHWATER FISH (ERS LEVEL) IN SWEDEN IN VALUE AND VOLUME, APRIL 2021**



Price trend

Figure 32. **EUROPEAN PERCH: FIRST-SALES PRICES IN SELECTED COUNTRIES, MAY 2018 - APRIL 2021**



Over the 36-month observation period (May 2018–April 2021), the weighted average first-sales price of European perch in **Sweden** was 2,45 EUR/kg, 27% higher than that of **Poland** (1,93 EUR/kg), and 9% more than that of **Estonia** (2,25 EUR/kg).

In **Estonia**, in April 2021, the average first-sales price of European perch (1,28 EUR/kg) increased by 5% compared to April 2020 and decreased by 29% from April 2019. The lowest average price was registered in April 2020 at 1,21 EUR/kg for 99 tonnes, while the highest average price of 5,37 EUR/kg was registered in February 2020 for 33 tonnes. Such high price is linked with lower supply due to fishery seasonality in winter.

In **Poland**, in April 2021, there were no recorded fist sales of European perch due to fishery seasonality. Over the observed period, the lowest price was registered in April 2020 at 1,34 EUR/kg for 7 tonnes. The highest price (3,21 EUR/kg for 129 kg) was observed in July 2020 when the volume was lowest in the past 36 months.

In **Sweden**, in April 2021, the average first-sales price of European perch (4,68 EUR/kg) increased by 27% compared to April 2020 and by 57% compared to April 2019. The lowest average price was registered in May 2019 at 1,16 EUR/kg for 9 tonnes, while the highest average price of 4,94 EUR/kg for 233 kg was registered in November 2020.

2. Extra-EU imports

The weekly extra-EU import prices (weighted average values per week, in EUR per kg) for nine different species are examined every month. The three most relevant species in terms of value and volume remain consistent: fresh whole Atlantic salmon from Norway, frozen Alaska pollock fillets from China, and frozen tropical shrimp (Penaeus spp.) from Ecuador. The other six species change each month; three are chosen from the commodity group of the month, and three are randomly selected. The commodity group of this month is "freshwater fish", and the featured species are frozen tilapia from China, frozen catfish from Vietnam, and frozen carp from Myanmar. The three randomly selected species this month are prepared or preserved herrings (whole or in pieces) from Norway, frozen surimi of fish n.e.s from Vietnam, and frozen fillets of Argentine hake "Southwest Atlantic hake" from Argentina.

Data analysed in the section "*Extra-EU imports*" are extracted from EUMOFA, as collected from the European Commission[30].

Table 21. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THE THREE MOST RELEVANT FISHERIES AND AQUACULTURE PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 21/2021	Preceding 4-week average	Week 21/2020	Notes
Fresh whole Atlantic salmon imported from Norway (*Salmo salar*, CN code 03021400)	**Price (EUR/kg)**	5,97	6,63 (–10%)	6,09 (–2%)	In 2021 prices ranged from 4,62 to 6,85 EUR/kg. Prices fell from week 19, but the upward trend was maintained since the beginning of the year (in contrast with the same period in 2020).
	Volume (tonnes)	12.262	10.195 (+20%)	11.015 (+11%)	In 2021 weekly volumes fluctuated from 6.172 to 15.320 tonnes. They started to increase from week 20, following a downward trend from the beginning of the year (in contrast with the same period of 2020).
Frozen Alaska pollock fillets imported from China (*Theragra chalcogramma*, CN code 03047500)	**Price (EUR/kg)**	2,47	2,52 (–2%)	2,92 (–15%)	In 2021, prices ranged from 2,40 to 2,61 EUR/kg and exhibited an upward trend, in line with the trend over the past three-year period.
	Volume (tonnes)	1.483	2.266 (–35%)	2.247 (–34%)	Since week 1 of 2021, volume ranged from 1.483 to 3.686 tonnes, showing a downward trend since the beginning of the year, the same as the trend over past three years.
Frozen tropical shrimp imported from Ecuador (genus *Penaeus*, CN code 03061792)	**Price (EUR/kg)**	5,25	5,13 (+2%)	5,95 (–12%)	Since the beginning of the year prices ranged from 4,58 to 5,47 EUR/kg, showing an upward trend since week 1 of 2021, in contrast with a downward trend over the same period of 2020.
	Volume (tonnes)	2.182	2.823 (–23%)	939 (+132%)	In 2021 weekly volumes fluctuated from 1.118 to 4.059 tonnes. Volumes less than 1.000 tonnes were also registered in weeks 4/2019, 6 and 21/2020. Upward trend since the beginning of the year.

[30] Last update: 20.06.2021

Figure 33. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY, 2018 - 2021**

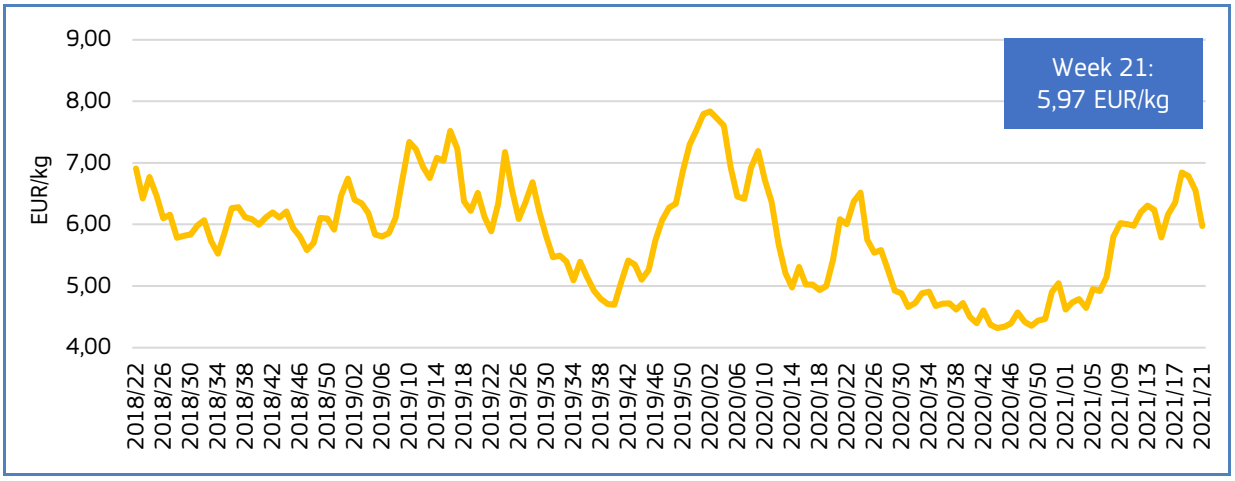


Figure 34. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2018 - 2021**

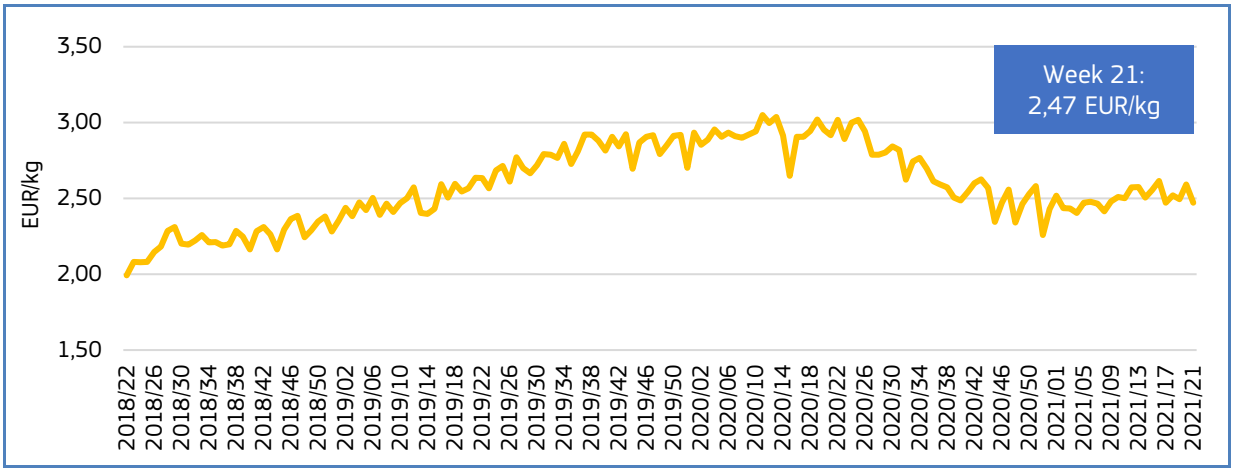


Figure 35. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2018 - 2021**

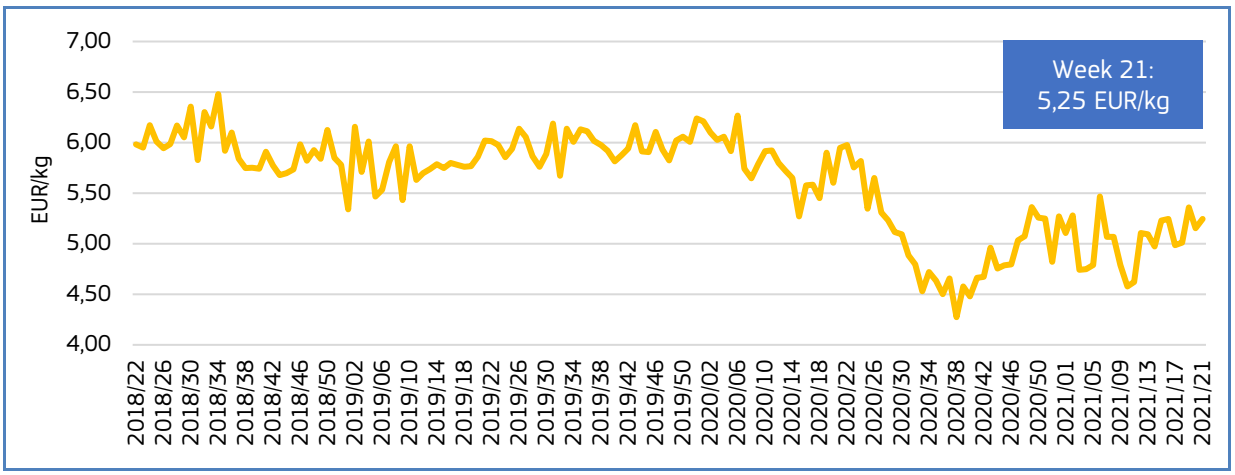


Table 22. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 21/2021	Preceding 4-week average	Week 21/2020	Notes
Frozen tilapia from China (*Oreochromis* spp., CN code 03032300)	**Price (EUR/kg)**	1,73	1,67 (+3%)	1,58 (+9%)	Overall downward trend over the past three years, though an increase in prices in 2021 was observed. Price ranged from 1,17-1,74 EUR/kg. Since week 1 of 2021, prices were over 1,29 EUR/kg.
	Volume (tonnes)	65	144 (–55%)	160 (–60%)	Upward trend over the past 3 years, with high weekly fluctuations in supply. Significant drop in supply since week 15 of 2021.
Frozen catfish from Vietnam (*Pangasius* spp., *Silurus* spp., *Clarias* spp., *Ictalurus* spp., CN code 03032400)	**Price (EUR/kg)**	1,55	1,53 (+2%)	1,80 (–14%)	Downward trend over the past three years, with price fluctuations from 0,95 to 2,87 EUR/kg. Some price spikes correlate with drop in supply.
	Volume (tonnes)	84	71 (+19%)	10 (+735%)	Upward trend over the past three years. Fluctuations in supply, from 2 to 159 tonnes. Significant drop in supply in week 12 of 2021.
Frozen carp from Myanmar (*Cyprinus* spp., *Carassius* spp., *Ctenopharyngodon idellus, Hypophthalmichthys* spp., *Cirrhinus* spp., *Mylopharyngodon piceus, Catla catla, Labeo* spp., *Osteochilus hasselti, Leptobarbus hoeveni, Megalobrama* spp., CN code 03032500)	**Price (EUR/kg)**	1,69*	1,64** (+3%)	2,09 (–19%)	Upward trend from 2018 to 2021, with price ranging from 0,77 to 5,59 EUR/kg. Some price spikes correlate with drop in supply.
	Volume (tonnes)	62*	45** (+39%)	77 (–20%)	Upward trend from 2018 to 2021. High weekly fluctuations in supply, from 4 to 139 tonnes; most volumes range between 11 and 40 tonnes.

** Data refers to week 19 of 2021 (the most recent available); **data refers to weeks 15 to 18 of 2021.*

Figure 36. **IMPORT PRICE OF FROZEN TILAPIA FROM CHINA, 2018 - 2021**

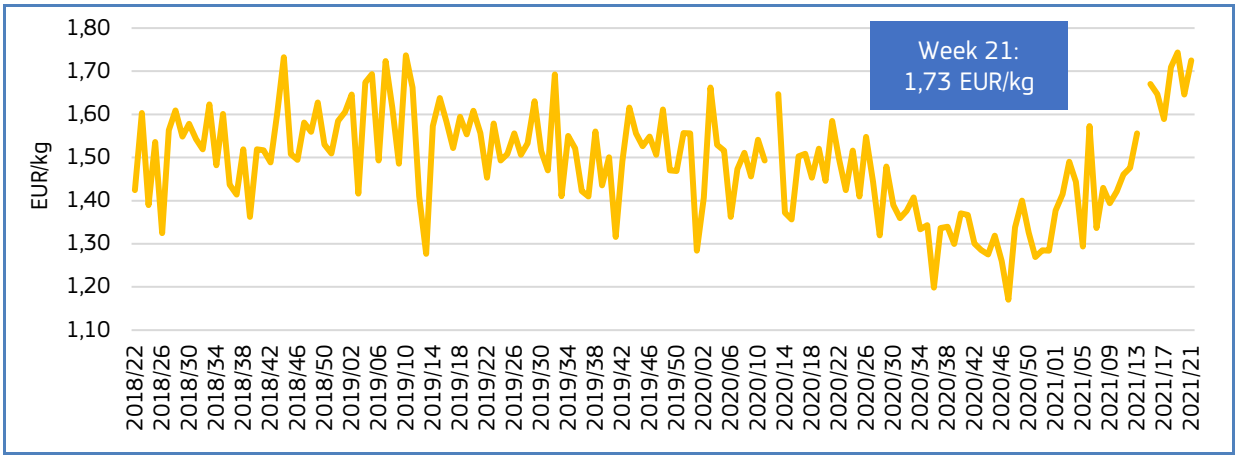


Figure 37. **IMPORT PRICE OF FROZEN CATFISH FROM VIETNAM, 2018 - 2021**

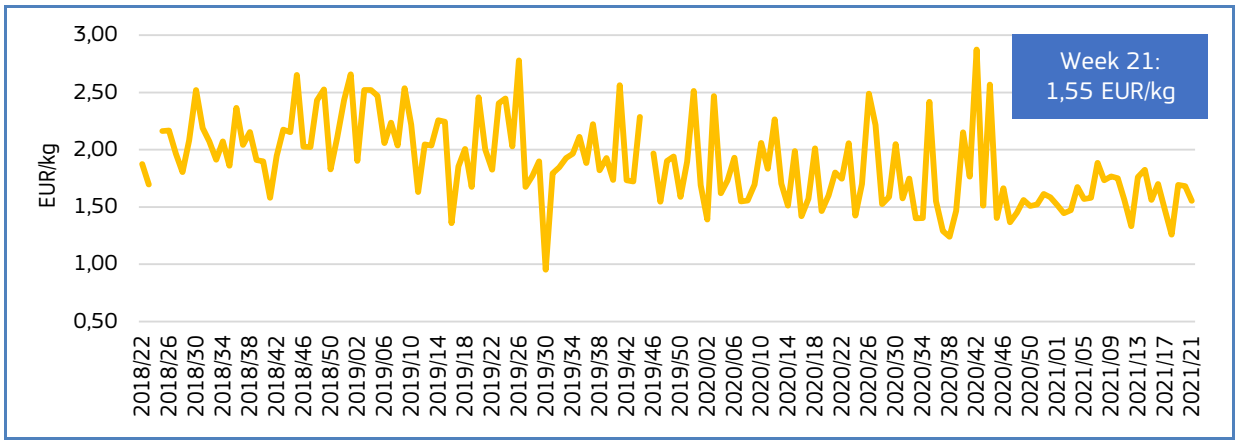
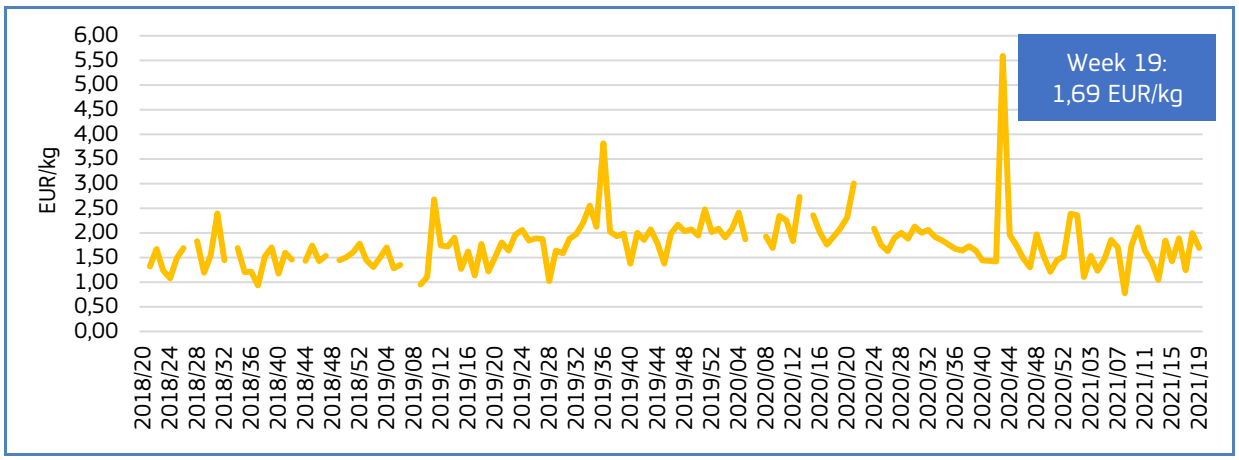


Figure 38. **IMPORT PRICE OF FROZEN CARP FROM MYANMAR, 2018 - 2021**



Since week 1 of 2021, the price of frozen tilapia from China showed an upward trend, while volume exhibited the opposite. Supply ranged from 17 to 3.900 tonnes.

Since the beginning of 2021, the price of frozen catfish from Vietnam was stable, while volume increased. Price ranged from 1,26 to 1,89 EUR/kg. Volume ranged from 9 to 121 tonnes.

The price of frozen carp from Myanmar was stable since the beginning of 2021. At the same time, volume exhibited an upward trend.

Table 23. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF EU IMPORTS OF THREE OTHER FISHERIES AND AQUACULTURE PRODUCTS RELEVANT TO THE EU MARKET**

Extra-EU Imports		Week 21/2021	Preceding 4-week average	Week 21/2020	Notes
Prepared or preserved herrings, whole or in pieces, from Norway (CN code 16041299)	**Price (EUR/kg)**	1,26	1,34 (–6%)	1,00 (+26%)	Upward trend from 2018 to 2021. Since week 1 of 2021, on average, prices were higher than in the same period of 2020. The price spike in week 31 of 2018 was not related to a drop in supply.
	Volume (tonnes)	53	341 (–84%)	286 (–82%)	High fluctuations in supply from 2018 to 2021, varying between 53 and 1.871 tonnes. The volume in week 21 of 2021 was the lowest recorded. Overall slight upward trend.
Frozen surimi of fish n.e.s. from Vietnam (CN code 03049910)	**Price (EUR/kg)**	2,60	1,87 (+39%)	2,20 (+19%)	Downward trend over the past three years. Most prices were over 2,00 EUR/kg. The price spike in week 8 of 2019 correlates with a decrease in supply.
	Volume (tonnes)	80	83 (–4%)	88 (–9%)	Upward trend over the past three years. Fluctuations in supply from 2 to 204 tonnes, with most of volumes less than 100 tonnes.
Frozen fillets of Argentine hake "Southwest Atlantic hake" from Argentina (*Merluccius hubbsi* CN code 03047415)	**Price (EUR/kg)**	2,54	2,51 (+1%)	2,90 (–12%)	Downward trend over the past three years, with prices ranging from 2,25 to 3,21 EUR/kg. Since week 1 of 2021, prices averaged around 2,50 EUR/kg.
	Volume (tonnes)	214	430 (–50%)	275 (–22%)	High weekly fluctuations. Volume ranged between 88 and 1.547 tonnes from 2018 to 2021, with an overall stable trend.

** Data refers to week 11 of 2021 (the most recent available).*

Figure 39. **IMPORT PRICE OF PREPARED OR PRESERVED HERRINGS WHOLE OR IN PIECES, FROM NORWAY, 2018 - 2021**

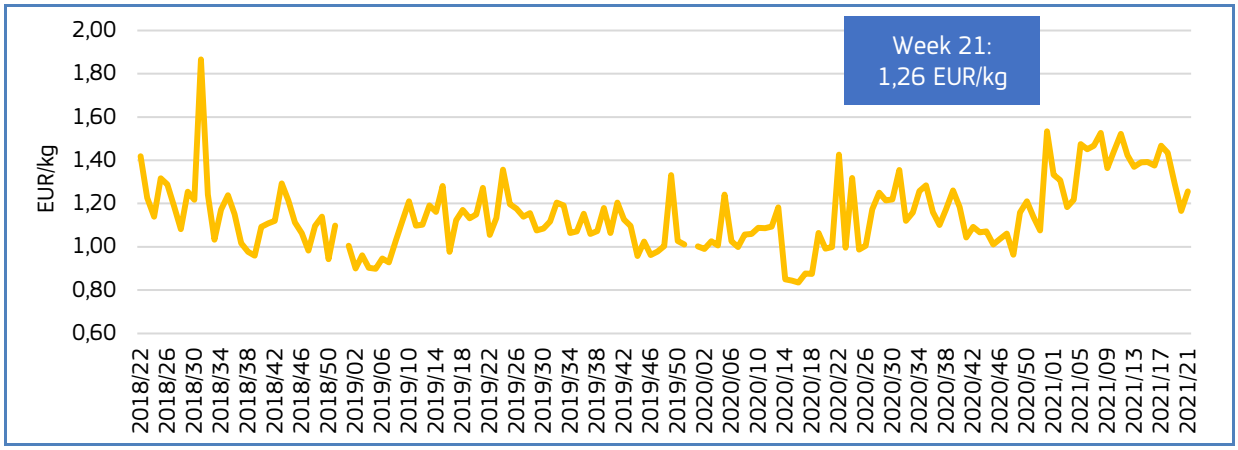


Figure 40. **IMPORT PRICE OF FROZEN SURIMI FROM VIETNAM, 2018-2021**

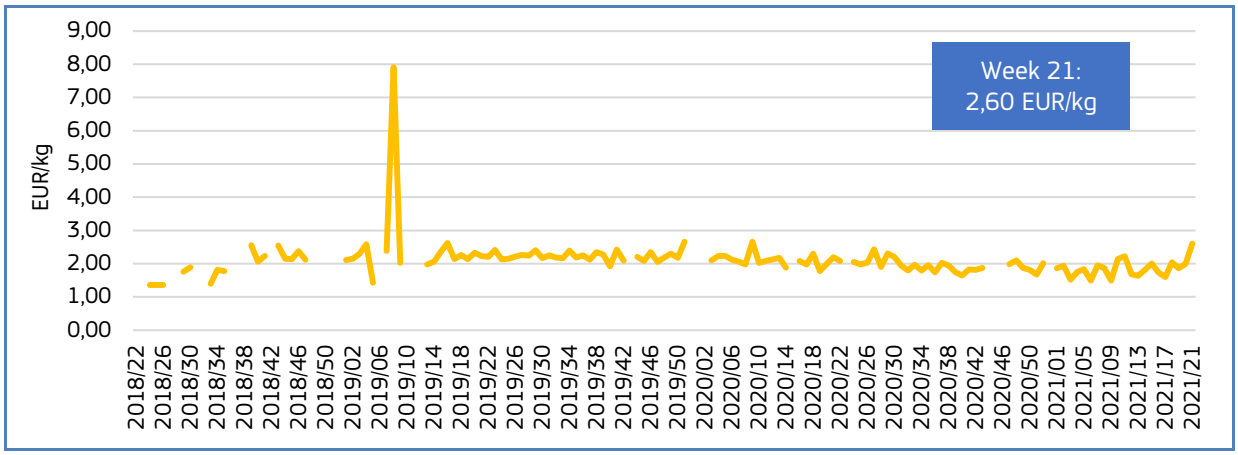
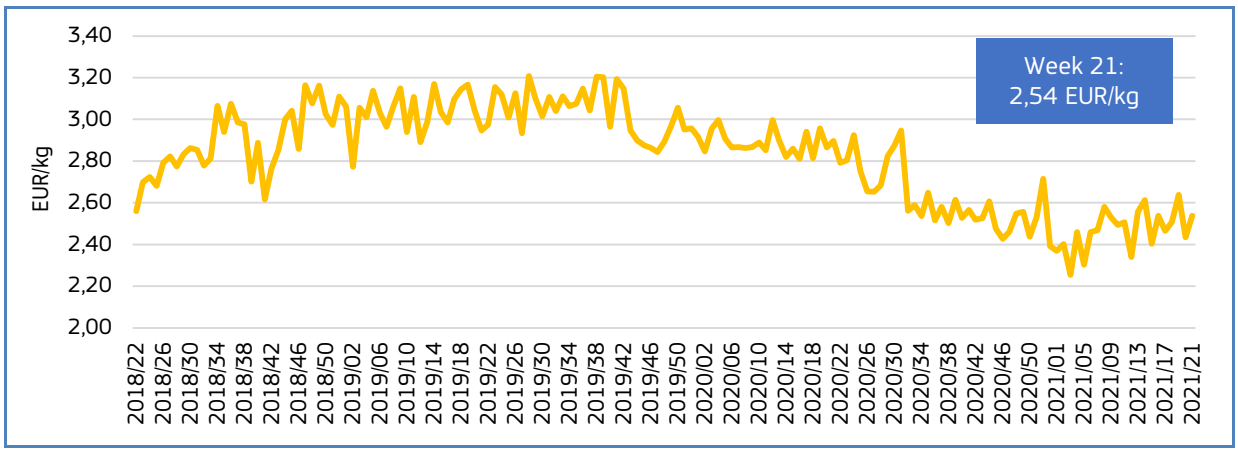


Figure 41. **IMPORT PRICE OF FROZEN FILLETS OF ARGENTINE HAKE FROM ARGENTINA, 2018 - 2021**



Since the beginning of the year, both price and volume of frozen surimi from Vietnam exhibited an upward trend.

From the beginning of 2021, price of frozen fillets of Argentine hake from Argentina exhibited an upward trend. At the same time, volume presented a downward trend and fluctuated from 181 to 1.223 tonnes.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[31].

In April 2021 compared with April 2020, household consumption of fresh fisheries and aquaculture products increased in both volume and value in five of the Member States analysed. France and Ireland experienced the highest increases in both volume and value. In France, the increase was mainly due to salmon (+38% in volume, +18% in value), as well as cod (+50% in volume, +32% in value), and monk (+177% in volume, +193% in value). Salmon was also among the main species responsible for increased consumption in Ireland (+41% in volume, +35% in value) and in Poland (+68% in volume, +64% in value). In Ireland, the increase in value was due to miscellaneous shrimp (+94%), and hake (+87%).

Hake (−19% in volume, −14% in value) and salmon (−21% in both volume and value) were the main contributors to decreased household consumption in Spain.

Table 24. **APRIL 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	April 2019		April 2020		January 2021		April 2021		Change from April 2020 to April 2021	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	39,83	1.148	17,88	1.304	21,76	1.380	25,33	1.229	20,16	▼ 6%	▼ 7%
France	33,52	17.948	193,80	12.821	180,76	20.026	244,25	19.643	246,25	▲ 53%	▲ 36%
Germany	14,50	5.231	87,89	6.493	107,79	8.899	131,29	7.161	109,79	▲ 10%	▲ 2%
Hungary	6,12	263	2,23	413	2,17	511	2,84	344	1,81	▼ 17%	▼ 17%
Ireland	23,13	1.463	16,22	981	14,83	1.500	22,08	1.488	22,32	▲ 52%	▲ 50%
Italy	31,02	32.600	251,13	19.753	207,52	30.638	333,08	25.332	269,07	▲ 28%	▲ 30%
Netherlands	20,90	2.915	41,50	2.718	49,64	3.860	67,70	2.689	46,82	▼ 1%	▼ 6%
Poland	13,02	4.770	24,09	3.111	19,99	4.732	31,49	3.938	27,79	▲ 27%	▲ 39%
Portugal	60,92	6.049	35,84	6.338	44,29	6.628	46,41	6.441	44,40	▲ 2%	0%
Spain	46,01	52.134	379,51	59.159	496,98	55.606	474,56	52.520	461,94	▼ 11%	▼ 7%
Sweden	26,61	701	10,94	951	12,25	1.179	14,78	910	11,78	▼ 4%	▼ 4%

**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 volume of fresh fisheries and aquaculture products in April has exceeded the annual average in five of the Member States analysed. In France, Hungary, Italy, the Netherlands, Poland, and Portugal, the average volume for April was below the annual average household consumption. In terms of value, the April average household consumption was below the annual average in Hungary, Italy, the Netherlands, and Poland.

The most recent weekly consumption data (up to **week 29 of 2021**) are available on the EUMOFA website and can be accessed **here**.

[31] Last update: 21.06.2021

3.2. Pike-perch

Habitat: Freshwater predatory species, living in lakes, rivers, reservoirs, and brackish coastal marine waters, usually at 2–3m depth.[32]
Catch area: Native to eastern Europe; present in Caspian, Baltic, Black, and Aral Sea basins; Elbe (North Sea basin), and Maritza (Aegean basin) drainages; north Finland.[33]
Catching countries in the EU: Denmark, Spain, the Netherlands.[34]
Production method: Caught and farmed.
Main consumers in the EU: Estonia, Finland, Germany, Poland, Sweden.
Presentation: Whole, headed and gutted, filleted.
Preservation: Fresh, frozen.

3.2.1. Overview of household consumption in Sweden

In 2018, Sweden was one of the 28 EU Member States where the per capita apparent consumption[35] of fisheries and aquaculture products is more than the EU average. In 2018, this amounted to 26,61 kg, a decrease of 4% compared to the previous year. It was 69% less than that of Malta[36], the Member State with the highest per capita apparent consumption (85,95 kg LWE), and 9% higher than the EU average (24,36 kg LWE).

See more on per capita apparent consumption in the EU in Table 23.

Over the past three years (May 2018 – April 2021), total Swedish household consumption of fresh pike-perch was 166 tonnes. For a kilogram of fresh pike-perch, Swedish consumers spent an average of 21,09 EUR.

We have covered **pike-perch** in previous *Monthly Highlights*:

First sales: Denmark 7/2018; Estonia 7/2018, 16/2016; Poland 7/2018.

[32] https://www.fishbase.in/summary/Sander-lucioperca.html
[33] Ibidem.
[34] https://eumofa.eu/
[35] "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.
[36] The high per capita apparent consumption in Malta could be due to imports of frozen small pelagics that are not destined for human consumption but for the bluefin tuna fattening industry.

Figure 42. **PRICES OF PIKE-PERCH PURCHASED BY SWEDISH HOUSEHOLDS**

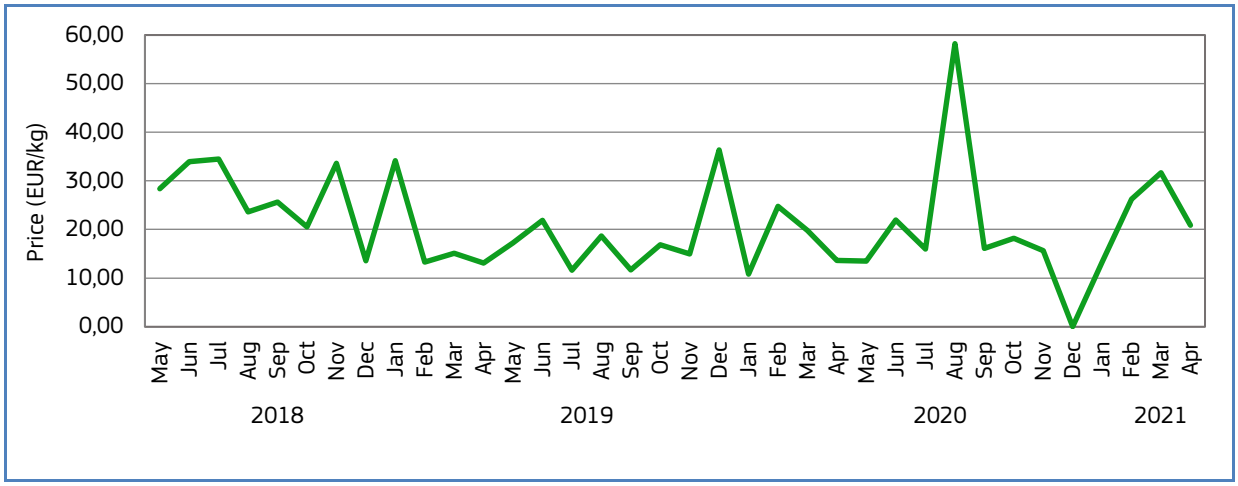
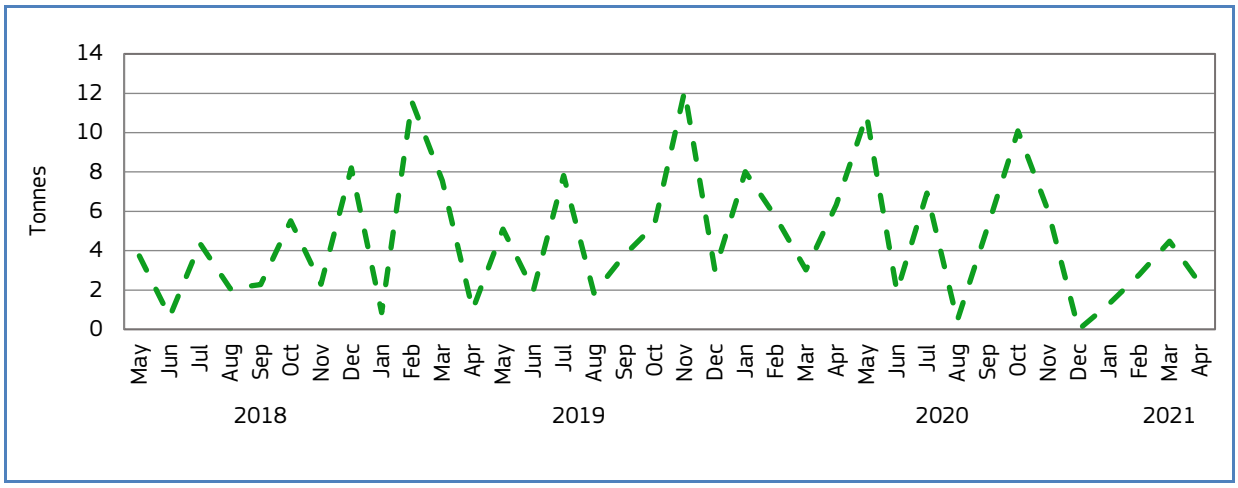


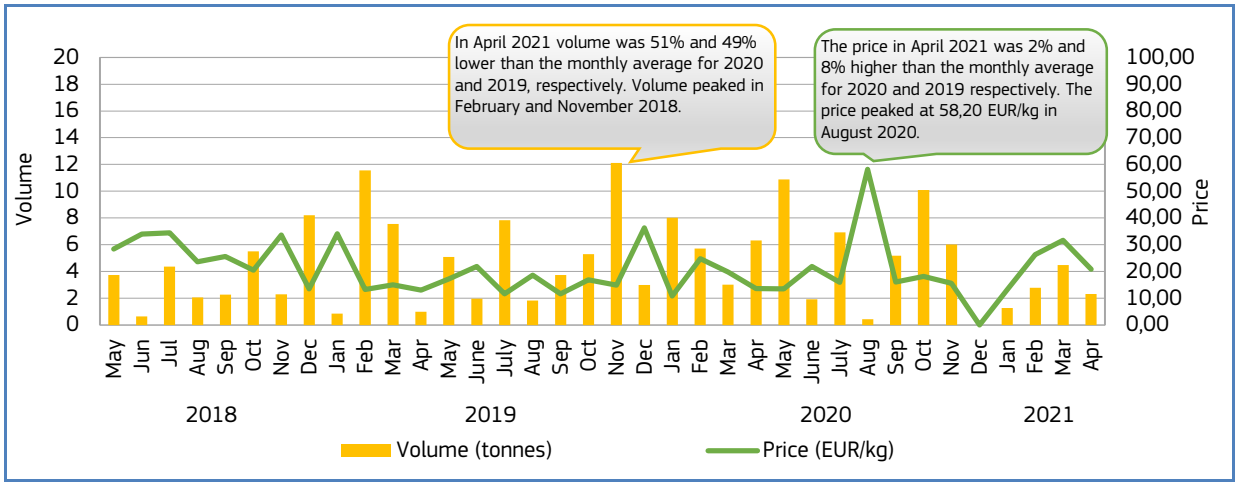
Figure 43. **HOUSEHOLD PURCHASES OF PIKE-PERCH IN SWEDEN**



3.2.2. Household consumption trends in Sweden

Long-term trend (May 2018 to April 2021): Downward trend in price, and upward trend in volume.
Yearly average price: 22,30 EUR/kg (2018), 18,74 EUR/kg (2019), 20,78 EUR/kg (2020).
Yearly consumption: 32 tonnes (2018), 62 tonnes (2019), 65 tonnes (2020).
Short-term trend (January to April 2021): Increase in price (+57% from January), increase in volume (+82% from January).
Average price (January to April 2021): 23,03 EUR/kg.
Consumption (January to April 2021): 11 tonnes.

Figure 44. **RETAIL PRICE AND VOLUME OF PIKE-PERCH PURCHASED BY HOUSEHOLDS IN SWEDEN, MAY 2018 – APRIL 2021**



4. Case study – Fisheries and aquaculture in Malaysia

4.1 Introduction

Malaysia is a country in Southeast Asia and Oceania. It comprises the Peninsular Malaysia as well as East Malaysia, which is made up of the states Sabah and Sarawak on the island of Borneo[37].

Malaysia has a total land area of 328.657km^2 and a 4.675km coastline[38]. Its marine waters are composed of a continental shelf of 148.307 km^2 and an Exclusive Economic Zone of 450.000 km^2 [39].

Source: CIA World Factbook.

The population is estimated at around 33,5 million, with 80% of the population residing on the Malay peninsula[40].

Malaysia has one of the highest estimated rates of annual consumption of fisheries and aquaculture products in the world, (59 kg per capita)[41]. Although fresh seafood has traditionally been the country's most important seafood product, the supply and demand for processed seafood has increased in recent years[42]. According to a preliminary survey by the Department of Statistics Malaysia, approximately 33% of workers in the fishery and aquaculture sectors lost their jobs, while a further 33% experienced a reduction in working hours following the COVID-19 pandemic[43].

4.2 Fisheries

In 2019, the FAO reported fisheries catches of 1.470 thousand tonnes for Malaysia, consisting of nine species of crustaceans, 149 species of fish, eight species of molluscs, three species of other aquatic invertebrates, and three ungrouped species[44]. Since 2000, the volume of catches has increased by 17% with a steady average growth of 1% each year. As marine resources are strained and the number of fishing boat licences have stabilised, it is unlikely that capture production will show any significant growth in the future[45]. Over 99% of catches are from marine fisheries, as inland fisheries production has always been negligible. In 2019, the largest volumes of catches were mackerel (6,39%), Indian scad (4,74%), and Natantian decapods (4,37%).

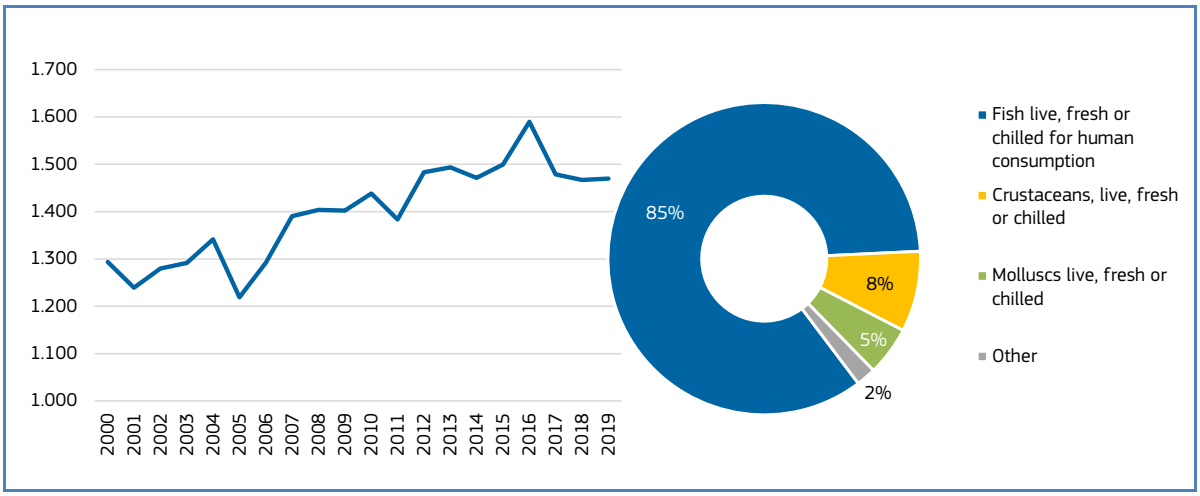
In 2008, the Department of Fisheries in Malaysia introduced a national plan for fisheries management in order to address concerns about overfishing and its threat to resource sustainability and food security[46]. The plan was revised in 2012 and contains a comprehensive strategy to strengthen monitoring, re-examination of the existing conservation measures, and a public awareness program[47]. To combat illegal fishing techniques, release of alien species, and habitat degradation in inland waters, stocking and release programs have been implemented alongside fish sanctuaries[48]. Additionally, to protect coastal

[37] Phang, Siew-Moi, Yeong, Hui-Yin and Lim, Phaik-Eem. "The seaweed resources of Malaysia" Botanica Marina, vol. 62, no. 3, 2019, pp. 265-273.
[38] https://www.cia.gov/the-world-factbook/countries/malaysia/
[39] https://seafood-tip.com/sourcing-intelligence/countries/malaysia/
[40] https://www.cia.gov/the-world-factbook/countries/malaysia/
[41] http://www.fao.org/fishery/facp/mys/en; 2016 estimates
[42] https://mifb.com.my/2020/03/17/fish-processing-industry/
[43] https://www.dosm.gov.my/v1/uploads/files/covid-19/Analisis_Survei_Khas_Kesan_COVID-19_Kepada_Ekonomi_dan_Individu-Laporan_Penuh.pdf
[44] Estuarine crocodile (4.900 tonnes), Hard corals - madrepores nei (4.000 tonnes), and Turban shells nei (80 tonnes)
[45] https://seafood-tip.com/sourcing-intelligence/countries/malaysia/
[46] Ibidem
[47] https://www.dof.gov.my/dof2/resources/user_1/UploadFile/Penerbitan/Senarai%20Penerbitan/NPOA.pdf
[48] http://www.seafdec.org/fisheries-country-profile-malaysia/

areas and traditional fishing areas, new zoning systems were introduced to reduce the number of trawlers and restrict their area of operation[49].

The fisheries sector in Malaysia was estimated to provide employment to 132.000 people in 2016, with 42% of fishermen defined as 'artisanal' and using fishing vessels with an outboard engine or no engine[50]. In 2016, there were 53,190 licensed fishing vessels, and 70% of landings were made by trawls or purse seine vessels[51].

Figure 45. **TOTAL CATCHES OF THE MALAYSIAN FLEET (LEFT, VOLUME IN 1.000 TONNES) AND CATCHES IN 2018 BY FAO COMMODITY GROUP (RIGHT)**



Source: FAO.

Table 25. **MAIN SPECIES IN MALAYSIA'S FISHERIES (volume in 1.000 tonnes)**

Species	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Mackerels nei								80	93	94
Indian scad	83	77	103	108	103	117	137	80	84	70
Natantian decapods nei	63	73	74	72	68	72	73	77	70	64
Indian mackerels nei	186	184	187	191	181	190	193	43	49	50
Lizardfishes nei	27	25	33	37	40	44	50	49	48	49
Clupeoids nei	33	37	38	45	40	42	38	44	41	49
Other	1.046	987	1.048	1.042	1.040	1.035	1.098	1.105	1.083	1.093
Total*	**1.438**	**1.383**	**1.483**	**1.494**	**1.471**	**1.500**	**1.590**	**1.479**	**1.467**	**1.470**

**Totals may not correspond with the sum of the separate figures due to rounding.*
Source: FAO.

[49] Ibidem
[50] http://www.seafdec.org/fisheries-country-profile-malaysia/
[51] Ibidem

4.3 Aquaculture

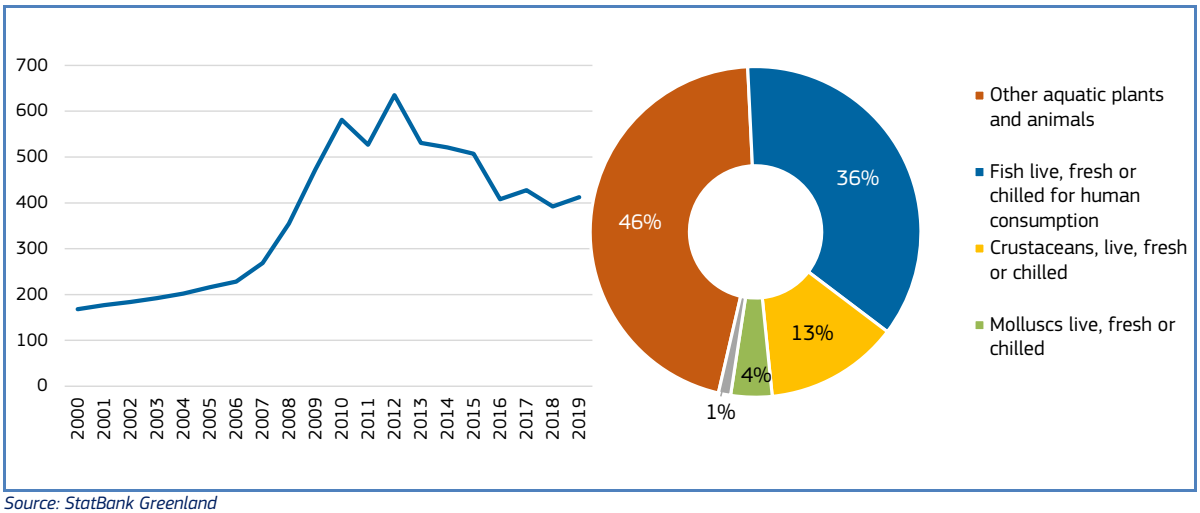
In 2019, the FAO reported 412.281 tonnes of aquaculture production for Malaysia, consisting of nine species of crustaceans, 43 species of fish, seven species of molluscs, one species of other aquatic invertebrates, one species of other aquatic plants and animals, and one ungrouped species (American bull frog 500 tonnes). Aquaculture production was divided between marine waters (48%), freshwater (44%), and brackish water (8%) in 2019. The aquaculture sector was estimated to provide employment to approximately 22.000 people in 2016[52].

In 2019, 46% of aquaculture production volume was Elkhorn sea moss (*Kappaphycus alvarezii*). Elkhorn sea moss is a species of red algae, and one of the most important carrageenan sources for food, cosmetic, and pharmaceutical industries. It is commercially cultivated in the eastern part of Malaysia[53].

Since 2013, aquaculture production has decreased by 22% due to a lower production of Elkhorn sea moss. However, overall the production has followed an increasing trend. Since 2000, aquaculture production has grown by 146% which is mainly attributed to the increase of Elkhorn sea moss production (+945% since 2001).

To ensure food security within Malaysia during the COVID-19 pandemic, the aquaculture sector was allowed to resume normal operation while all other non-essential services were closed[54]. However, fresh and wet markets were closed to limit the spread of infections, which caused problems as these markets are the main selling point for small-scale aquaculture producers[55].

Figure 46. **AQUACULTURE PRODUCTION IN MALAYSIA (LEFT, VOLUME IN 1.000 TONNES) AND AQUACULTURE PRODUCTION IN 2019 BY FAO COMMODITY GROUP (RIGHT)**



Source: StatBank Greenland

[52] Ibidem
[53] Razali, Mohd & Rozaiman, Mohamad & Laizani, N & Mohammad, Salma Malihah & Zawawi, Norhasnida. (2019). Application of seaweed (Kappaphycus alvarezii) in Malaysian food products. International Food Research Journal. 26. 1677-1687.
[54] Khor Waiho, Hanafiah Fazhan, Sairatul Dahlianis Ishak, Nor Azman Kasan, Hon Jung Liew, Mohd Husin Norainy, Mhd Ikhwanuddin, Potential impacts of COVID-19 on the aquaculture sector of Malaysia and its coping strategies, Aquaculture Reports, Volume 18, 2020
[55] https://www.dosm.gov.my/v1/uploads/files/covid-19/Analisis_Survei_Khas_Kesan_COVID-19_Kepada_Ekonomi_dan_Individu-Laporan_Penuh.pdf

Table 26. **MAIN SPECIES IN MAYLASIA'S AQUACULTURE PRODUCTION (volume in 1.000 tonnes, value in million EUR)**

	2015		2016		2017		2018		2019	
Species	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Elkhorn sea moss	261	33	206	25	203	10	174	13	188	689*
Whiteleg shrimp	48	261	38	185	36	185	36	204	39	218
Tilapias nei	31	67	27	57	27	57	26	62	32	79
Torpedo-shaped catfishes nei	51	57	37	53	35	47	33	49	28	39
Pangas catfish	14	37	17	36	20	38	18	41	18	34
Barramundi(=Giant seaperch)	29	112	15	56	30	113	21	90	17	69
Other	73	279	69	285	77	309	83	358	90	409
Total**	**507**	**845**	**408**	**697**	**428**	**760**	**392**	**816**	**412**	**1.538***

**The value of Elkhorn sea moss production is likely overstated for 2019.*
***Totals may not correspond with the sum of the separate figures due to rounding.*
Source: FAO.

4.4 Processing

Malaysia's fish processing sector is export-oriented and is dominated by small- and medium-scale enterprises[56]. Processing typically encompasses prawns, frozen products, canning of fish, and the production of surimi and surimi products[57]. Most of the aquaculture production in Malaysia involves prawn farming, with some companies also producing value-added products such as battered and breaded products and food supplements. For production of surimi, marine fish such as threadfin bream, bigeye tuna, lizard fish, and croaker are commonly used[58]. Surimi is used in production of fish ball and fish cakes amongst other things, and are primarily sold domestically, while products such as imitation crabsticks are destined both for the domestic and export market[59]. However, insufficient fish supply and reallocation of processing firms has led to reduced production in recent years[60].

During the initial stages of the COVID-19 pandemic, fish processing and value-adding industries were limited to minimal operation (50% of the workforce) to enable social distancing[61].

4.5 International trade

Malaysia is one of the 10 members[62] of the Association of Southeast Asian Nations (ASEAN), the third largest economy in the region in terms of GDP (12%) and the EU's third largest trading partner in the ASEAN[63].

In 2020, Malaysia exported a total of 702.738 tonnes of fisheries and aquaculture products (FAP) for a value of EUR 928 million. Other non-food use products (other than fishmeal and fish oil) were the largest group of FAPs exported from Malaysia in 2020. This mainly consists of ornamental fish which are exported live. These products covered 50% of the export volume and 20% of the total value in 2020, which is a 22% and 32% increase, respectively, since 2019. Exports of shrimps covered 20% of total export value but only 5% of the volume, while fishmeal covered 7% of total export volume

[56] https://mifb.com.my/2020/03/17/fish-processing-industry/
[57] Ibidem
[58] Park, Jae. Surimi and Surimi Seafood. 2014 Third edition. CRC Press, Taylor & Francis Group
[59] Ibidem
[60] Ibidem
[61] Khor Waiho, Hanafiah Fazhan, Sairatul Dahlianis Ishak, Nor Azman Kasan, Hon Jung Liew, Mohd Husin Norainy, Mhd Ikhwanuddin, Potential impacts of COVID-19 on the aquaculture sector of Malaysia and its coping strategies, Aquaculture Reports, Volume 18, 2020
[62] Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Vietnam.
[63] https://ec.europa.eu/trade/policy/countries-and-regions/countries/malaysia/

but only 5% of the value. The MCS "other cephalopods" consist of cuttlefish and squid and covered 5% of export volume and 8% of export value in 2020.

Total exports from Malaysia

Table 27. **MALAYSIAN EXPORTS BY MAIN COMMERCIAL SPECIES (volume in 1.000 tonnes, value in million EUR)**

	2017		2018		2019		2020		2021	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Other non-food use	205	130	253	139	291	142	354	188	50	29
Fishmeal	25	31	45	44	42	47	48	49	4	3
Shrimp, miscellaneous	38	185	37	193	47	255	37	187	10	45
Other cephalopods	22	76	21	66	31	83	33	78	4	12
Jellyfish	2	5	2	4	5	8	9	14	0	0
Mackerel	5	9	9	10	4	8	8	9	1	1
Other	143	316	146	314	167	386	215	403	30	58
Total	**440**	**751**	**514**	**770**	**587**	**928**	**703**	**928**	**100**	**150**

**Data only available up to February 2021.*
***Totals may not correspond with the sum of the separate figures due to rounding.*
Source: EUMOFA elaboration of IHS Markit data (Global Trade Atlas).

Malaysia reported an export of FAPs to Singapore which covered 20% of the volume and 16% of the value in 2020, which is an increase of 54% and 6%, respectively, since 2019. China was the second largest export destinations covering 18% of total export volume and 26% of the export value. All of the six largest export destinations experienced positive growth in both export volume and value, with the exception of the USA, where the exported volume and value were both lower (by 22% and 13% respectively) relative to 2019.

Table 28. **MALAYSIAN EXPORTS BY DESTINATION COUNTRY (volume in 1.000 tonnes, value in million EUR)**

	2017		2018		2019		2020		2021	
Partner Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Singapore	55	111	72	121	93	139	144	148	25	29
China	37	60	56	111	90	223	127	239	18	41
Thailand	48	34	45	37	61	44	89	55	12	8
the United States	49	50	78	60	94	76	73	66	8	9
Vietnam	74	140	60	70	45	44	51	41	9	6
Brunei Darussalam	29	19	30	19	25	21	34	27	5	4
Other	148	337	174	353	180	382	185	352	23	53
Total	**440**	**751**	**514**	**770**	**587**	**928**	**703**	**928**	**100**	**150**

**Data only available up to February 2021.*
***Totals may not correspond with the sum of the separate figures due to rounding.*
Source: EUMOFA elaboration of IHS Markit data (Global Trade Atlas).

Total imports to Malaysia

In 2020, Malaysia imported 634.874 tonnes of FAPs. Fishmeal, miscellaneous small pelagic fish and mackerel each covered 5% of the imported volume and 3% of the total imported value. 20% of the imported volume originated from Vietnam, which covered 27% of value. Closely behind (in terms of volume) is China at 16%, with value at 38%. Third in both volume and value are imports from Thailand, covering 16% and 19% respectively.

Table 29. **MALAYSIAN IMPORTS BY MAIN COMMERCIAL SPECIES (volume in 1.000 tonnes, value in million EUR)**

	2017		2018		2019		2020		2021	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Fishmeal	14	21	19	18	19	24	34	33	6	5
Miscellaneous small pelagic fish	28	36	22	27	26	32	34	39	5	6
Mackerel	38	52	34	48	34	50	30	44	5	7
Shrimp, miscellaneous	23	81	25	80	29	105	28	95	8	27
Freshwater catfish	9	14	10	18	16	26	16	22	2	2
Fish oil	9	17	8	14	9	17	9	19	1	3
Other	466	824	485	868	490	951	483	932	92	170
Total	**587**	**1.045**	**603**	**1.073**	**622**	**1.204**	**635**	**1.183**	**120**	**219**

**Data only available up to February 2021.*
***Totals may not correspond with the sum of the separate figures due to rounding.*
Source: EUMOFA elaboration of IHS Markit data (Global Trade Atlas).

Table 30. **MALAYSIAN IMPORTS BY PARTNER COUNTRY (volume in 1.000 tonnes, value in million EUR)**

Partner Country	2017		2018		2019		2020		2021*	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Vietnam	93	133	102	150	121	176	125	169	19	22
China	117	243	104	219	112	239	116	244	27	55
Thailand	119	108	118	117	109	117	100	123	24	26
Indonesia	54	127	63	159	69	176	69	155	9	21
India	28	56	28	59	20	49	18	48	4	10
Japan	15	30	17	35	13	32	18	33	1	3
Other	162	349	171	334	178	415	189	412	36	83
Total**	**587**	**1.045**	**603**	**1.073**	**622**	**1.204**	**635**	**1.183**	**120**	**219**

**Data only available up to February 2021*
***Totals may not correspond with the sum of the separate figures due to rounding.*
Source: EUMOFA elaboration of IHS Markit data (Global Trade Atlas)

EU[64] imports from Malaysia

In 2020, the EU imported 2.376 tonnes of seafood from Malaysia. Imports of warmwater shrimp accounted for 19% of the volume and 29% of the value, and 92% of this volume went to France. However, the majority (60%) of French imports is unidentified marine fish. Surimi imports covered 11% of the total imported volume and 7% of value in 2020, a reduction

[64] The UK formally left the EU on 31st January 2020 and entered a transition period that lasted until 31st December 2020. For the sake of consistency, the UK is excluded from the EU aggregate and treated as an extra-EU country throughout the whole period in all analyses in this case study.

of 50% and 43% respectively. Surimi is almost exclusively imported by Italy, which is also the major importer of octopus. Together, France and Italy covered 95% of the FAP volume and 91% of the FAP value of imports to the EU from Malaysia.

Table 31. **EU IMPORTS FROM MALAYSIA BY MCS (volume in tonnes, value in 1.000 EUR)**

MCS	2017		2018		2019		2020		2021*	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Shrimp, warmwater	541	5.160	660	6.439	564	5.672	459	4.483	167	1.506
Surimi	467	1.592	457	1.532	527	1.870	264	1.057	73	247
Octopus	45	206	49	250	53	257	72	230		
Sardine	20	52	15	49	25	69	15	54	15	56
Shrimps, miscellaneous	53	446	62	572	40	349	14	133		
Squid	94	513	302	1.648	22	116	14	72		
Other	2.216	11.289	2.219	11.877	2.583	14.457	1.538	9.309	306	1.813
Total	**3.435**	**19.258**	**3.764**	**22.367**	**3.813**	**22.790**	**2.376**	**15.338**	**561**	**3.622**

**Data only available up to February 2021.*
***Totals may not correspond with the sum of the separate figures due to rounding*
Source: EUMOFA elaboration of EUROSTAT.

Table 32. **EU IMPORTS FROM MALAYSIA BY MEMBER STATE (volume in tonnes, value in 1.000 EUR)**

Partner Country	2017		2018		2019		2020		2021*	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
France	2.317	14.001	2.361	15.368	2.556	16.569	1.726	11.742	439	2.935
Italy	724	3.169	915	4.036	816	3.480	521	2.182	77	319
Denmark	15	118	53	306	57	287	39	201	0,0	0,01
Cyprus	33	145	24	103	41	211	34	213	8	37
Portugal	51	267	57	452	64	311	21	126	0	10
Greece	4	69	4	65	23	178	16	125	1	19
Other	291	1.489	350	2.036	257	1.754	19	750	36	302
Total	**3.435**	**19.258**	**3.764**	**22.367**	**3.813**	**22.790**	**2.376**	**15.338**	**561**	**3.622**

**Data only available up to February 2021*
***Totals may not correspond with the sum of the separate figures due to rounding*
Source: EUMOFA elaboration of EUROSTAT

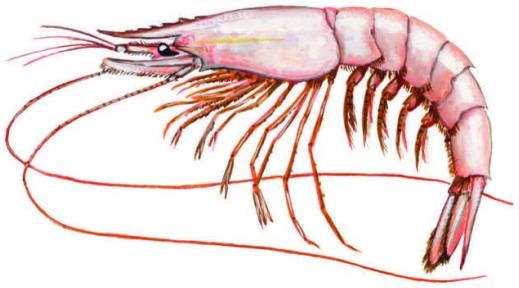
5. Case study – Deep-water rose shrimp in the EU

Deep-water rose shrimp is a species of commercial importance for EU Mediterranean fisheries using bottom trawls. In 2018, EU landings amounted to almost 20.000 tonnes, mostly in Italy, Spain, and Greece. In addition, almost 7.000 tonnes are imported as frozen whole shrimp on a yearly basis, mostly from Morocco, Tunisia, and Senegal. The species is mostly consumed in producing countries, next to first-sale places, where it can reach relatively high prices, especially in Spain.

5.1. Biology resource and exploitation

BIOLOGY

The deep-water rose shrimp (*Parapenaeus longirostris*) is a decapod crustacean of the family of the Pandalidae. Fast-growing and short-living, it can be found in the East Atlantic from Portugal to Angola, across the entire Mediterranean, and in the West Atlantic from Massachusetts, U.S.A. to French Guiana. It lives on grounds of mud or muddy sand at depths of 20 to 700m but is usually found between 150 and 400m. This species has a size-segregated bathymetric distribution. Juveniles are found in shallow waters while larger individuals inhabit deeper waters.



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Its maximum total length is 160 mm for male and 186 mm for female, though individuals are usually shorter, between 140 mm (male) and 160 mm (female)[65]. Deep-water rose shrimp feed on polychaetes, crustaceans, and molluscs.

RESOURCE EXPLOITATION, AND MANAGEMENT IN THE EU

A large number of fleets target the species, particularly in the eastern Mediterranean, but it is also exploited in the eastern Atlantic, the Balearic Islands, and the Tyrrhenian Sea. Deep-water rose shrimp is targeted by semi-industrial and artisanal fisheries mostly using bottom trawls, and occasionally palanzas (in Morocco, for young shrimp)[66]. Fishing is seasonal, with peaks in winter (January–December) and spring (April–May) when the species is most abundant.

The recommendation of the General Fisheries Commission for the Mediterranean (GFCM) for the implementation of a multiannual management plan for fisheries targeting deep-water rose shrimp and European hake was adopted to ensure the conservation of the species[67]. The deep-water rose shrimp stock in the Ligurian and northern Tyrrhenian Seas is one of the few stocks in the western and central Mediterranean thought to be exploited sustainably, exhibiting a sharp increase in abundance in the last few years, possibly linked with the increase of surface temperature[68].

In the Northeast Atlantic, the minimum conservation reference size is 22 mm (carapace length) with the exception of the Mediterranean, where it is 20 mm[69].

[65] http://www.fao.org/fishery/species/2598/en
[66] http://www.fao.org/fishery/docs/CDrom/ARTFIMED/ArtFiWeb/descript/Species/PENPALON.HTML
[67] http://www.fao.org/gfcm/decisions/en/
[68] https://archimer.ifremer.fr/doc/00489/60052/63331.pdf
[69] https://fish-commercial-names.ec.europa.eu/fish-names/species_en?sn=27096

5.2. Production

CATCHES

Global production of deep-water rose shrimp amounted to 23.223 tonnes in 2019. Most of the catches occur in the Mediterranean. The leading producer in 2019 was by far the EU28, which accounted for 65% of total catches. Other major producers were Turkey (13%) and Tunisia (12%), and to a lesser extent Algeria and Albania (3% each). EU catches of deep-water rose shrimp amounted to 18.931 tonnes in 2019, major producers being Italy, Spain, and Greece.

Over the last decade (2010-2019), reported catches of deep-water rose shrimp have experienced a 50% increase. All major producing countries experienced increases in catch volumes over this period: +27% for EU27, +173% for Turkey and +75% for Tunisia.

Table 33. **TOTAL WORLD CATCHES OF DEEP-WATER ROSE SHRIMP (volume in tonnes)**

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
EU27	14.947	16.399	12.426	12.176	12.195	13.282	14.054	17.642	19.596	18.931
Turkey	1.413	1.482	1.601	1.620	2.502	1.764	1.810	2.357	3.213	3.852
Tunisia	1.932	1.840	2.745	3.528	2.821	2.762	2.801	3.606	3.729	3.375
Algeria	719	925	1.115	893	986	946	1.044	1.229	1.090	1.019
Albania	7	209	1.170	1.210	1.430	1.290	1.460	1.473	1.275	962
Others	492	785	2.079	4.641	4.578	2.306	3.467	4.548	3.171	1.084
Total	19.510	21.640	21.136	24.068	24.512	22.350	24.636	30.855	32.074	29.223

Source: FAO.

LANDINGS IN THE EU

In 2018, landings of deep-water rose shrimp in the EU28 amounted to 18.843 tonnes for a total value of EUR 132 million. Deep-water rose shrimp was mostly landed live/fresh, accounting for 89% of total landed volume. The remaining 11% concerned frozen landings. Italy was by far the most important landing country, accounting for 48% of the total volume, and 47% of the total value. Other major landing countries were Spain (27% of landing volume) and Greece (18%), and to a lesser extent Croatia (4%) and Portugal (3%).

Over the 2009-2018 period, deep-water rose shrimp landings experienced a 31% increase in volume. However, among major producing countries, different trends were experienced. Italian landings decreased slightly (-16%), whereas Spain (+207%) and Greece (+213%) experienced significant increases of landed volumes. Portuguese landings fell (-42%). In value, over the 2009-2018 period, the total EU landings slightly increased in real terms by 4% due to a drop of average landing price by 20%[70].

[70] Values are deflated by using the GDP deflator (base=2015).

Table 34. **LANDINGS OF DEEP-WATER ROSE SHRIMP IN THE EU28 (volume in tonnes)[71]**

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Italy	10.675	10.029	8.267	8.311	7.675	9.090	8.833	9.210	9.827	9.011
Spain	1.674	2.631	1.628	2.724	3.501	3.303	2.278	3.937	4.583	5.145
Greece	1.082	1.101	1.152	1.266	1.126	1.002	1.983	3.264	3.555	3.387
Croatia	0	0	0	312	368	534	655	834	913	714
Portugal	936	1.466	710	414	432	205	179	196	460	543
France	31	29	29	33	46	31	50	53	46	35
Malta	7	21	32	24	22	16	12	10	10	6
Cyprus	0	0	0	0	0	0	0	0	0	1
Totals	**14.404**	**15.278**	**11.818**	**13.082**	**13.169**	**14.181**	**13.990**	**17.504**	**19.393**	**18.843**

Source: EUMOFA elaboration of EUROSTAT data..

MARKETING AND CONSUMPTION

Regularly present in the fresh markets in Mediterranean countries, deep-water rose shrimp is marketed as fresh, cooked and chilled, and frozen. This is the species of shrimp with the greatest commercial importance on the Mediterranean coasts of Spain, Morocco, southern Italy and Cyprus[72]. It is usually prepared cooked with coarse salt, or peeled in tortillas and salads, and for its promotion there are usually annual fairs dedicated to this product on the Huelva coast in Spain such as those in Punta Umbría, Isla Cristina or Huelva[73].

5.3. International trade

EU TRADE FLOWS AND SUPPLY

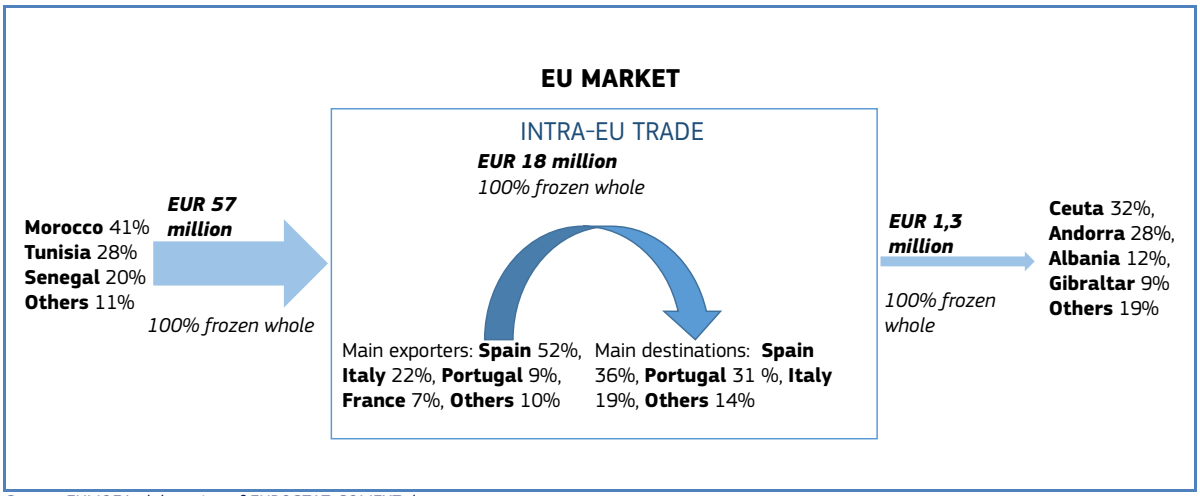
In the CN nomenclature used for registering EU import-export data, deep-water rose shrimp is specifically reported only as frozen whole[74]. However, other codes that encompass a broader variety of shrimp species may include deep-water rose shrimp products, though with minor importance.

In 2020, the EU27 had a trade deficit for deep-water rose shrimp products, amounting to EUR 56 million[75]. In 2020, extra-EU imports reached 6.648 tonnes for EUR 57 million, exclusively reported as frozen whole products. Morocco, Tunisia, and Senegal were by far the main suppliers accounting for 41%, 28% and 20% of the import value of deep-water rose shrimp products, respectively. Extra-EU exports of deep-water rose shrimp products were much lower (EUR 1,3 million for 230 tonnes in 2020) - also exclusively reported as frozen whole - and transported to a variety of destinations among which Ceuta (32% of export value), Andorra (28%) and Albania (12%) were the most important.

[71] Totals do not correspond exactly to actual sums because of roundings.
[72] http://www.fao.org/fishery/docs/CDrom/ARTFIMED/ArtFiWeb/descript/Species/PENPALON.HTML
[73] https://es.wikipedia.org/wiki/Parapenaeus_longirostris
[74] 03061791 Frozen deep-water rose shrimps "Parapenaeus longirostris", even smoked, whether in shell or not, incl. shrimps in shell, cooked by steaming or by boiling in water.
[75] UK is considered as an extra-EU partner in this case study.

In 2020, intra-EU exports reached EUR 18 million for 2.266 tonnes of deep-water rose shrimp products[76]. Spain was the main exporter, accounting for 52% of intra-EU exports value. Spain is likely to be an export hub for frozen shrimp to Western Atlantic African countries. Italy, and to a lesser extent Portugal and France, were major deep-water rose shrimp suppliers to other EU countries, with Spain, Portugal and Italy as the main destinations.

Figure 47. **THE DEEP-WATER ROSE SHRIMP EU27-TRADE MARKET IN 2020, IN VALUE**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

5.4. Deep-water rose shrimp: first sales in the EU

Monthly first-sale data cover only a portion of deep-water rose shrimp landings in EU. However, they provide an interesting source of data for analysing the seasonality of volumes and prices. Indeed, the monthly data for first sales in major producing EU countries show a clear seasonality of the deep-water rose shrimp fishery, and a common pattern can be observed among major producing countries. In Italy, Spain and Greece, first-sale volumes increase in the first quarter to peak in spring (May-June most often) then decrease in late summer and September and increase again in October-November.

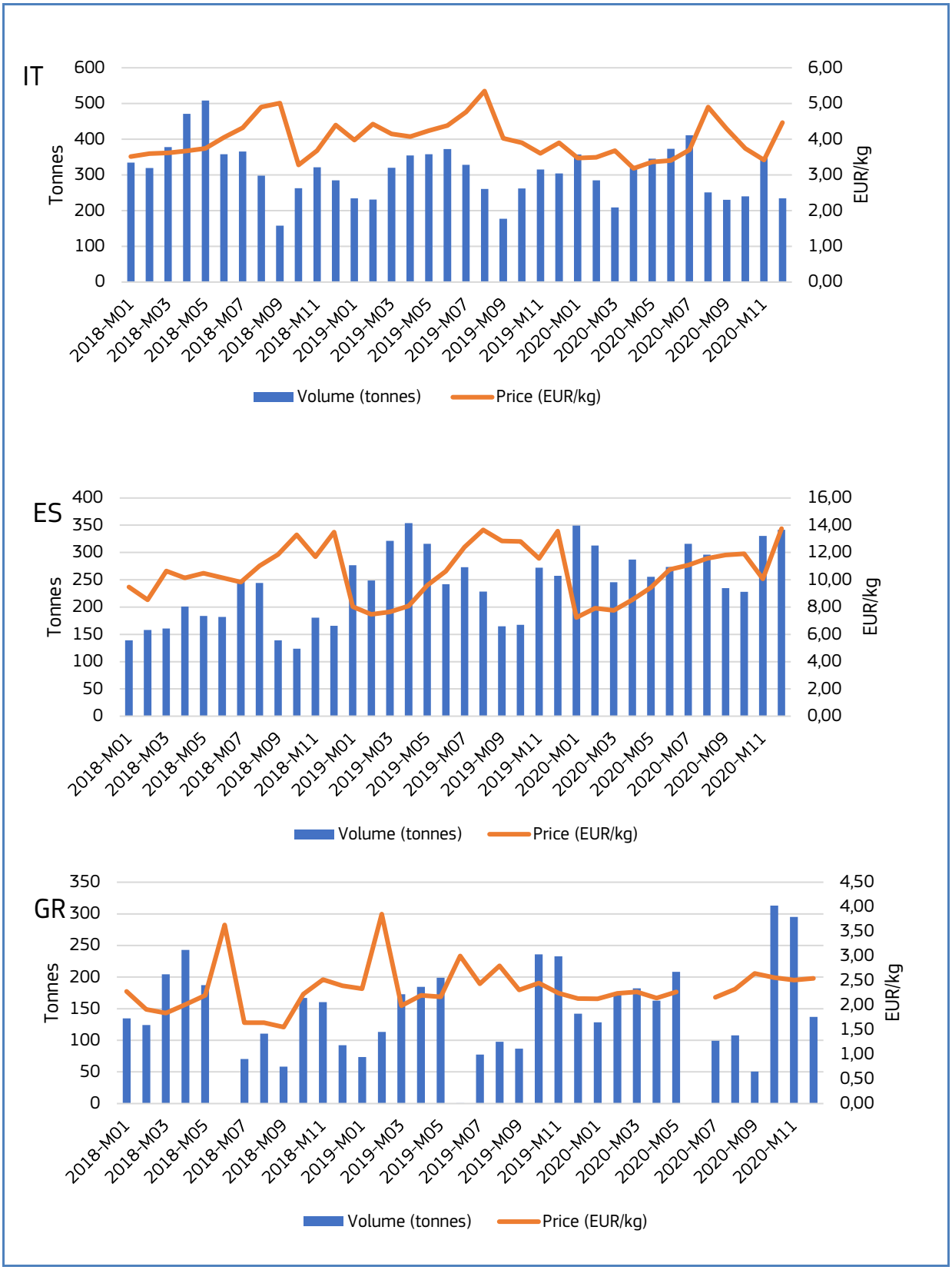
Through the year, monthly first-sales volumes in Italy fluctuate between 160 and 510 tonnes. Comparable levels are reported in Spain (between 120 and 360 tonnes) whereas reported monthly first sales are slightly lower in Greece (between 0,2 and 320 tonnes).

In 2020, the main place of first sale for deep-water rose shrimp in Spain was Huelva, accounting for 29% of total deep-water rose shrimp first-sale volume in Spain. Other important ports were Isla Cristina (13%) and Sanlucar De Barrameda, and Ayamonte (10% each). In Italy, the main places of sale were Mazara del Vallo, Manfredonia, Sciacca and Porto Santo Stefano, accounting for 12%, 9%, 9% and 7% of total first-sale volume, respectively. In Portugal, the main place of sale for deep-water rose shrimp was Vila Real de Santo Antonio (99% of total volume).

In major producing countries, variations of first-sale prices for fresh whole deep-water rose shrimp seem well correlated with the seasonality of volumes, with lower prices in spring and autumn and increasing prices in late summer season. However, there are huge differences of first-sale prices among countries. In Greece, prices fluctuate between 1,50 EUR/kg and 4,00 EUR/kg. Prices are higher in Italy: between 3,20 EUR/kg and 5,40 EUR/kg. In Spain, prices are significantly higher with variations between 7,00 and 14,00 EUR/kg.

[76] To be noted that intra-EU imports amounted to 5.159 tonnes for EUR 41 million. In general, bilateral comparisons between Member States of intra-EU flows reveal major and persistent discrepancies, thus comparisons dealing with intra-EU trade statistics and related results must be taken into account cautiously and should consider the existence of these discrepancies.

Figure 48. **FIRST SALES: FRESH DEEP-WATER ROSE SHRIMP IN ITALY, SPAIN, AND GREECE**



Source: EUMOFA.

6. Global highlights

EU / Fisheries / CFP: The European Commission has published an in-depth analysis of Member States' sanctioning systems for infringements of the rules of the common fisheries policy (CFP), covering the period from 2015-2019 and all coastal Member States. All Member States included in the study have a system in place for sanctioning infringements, with many making significant improvements since 2015. The study can be consulted **here**[77].

EU / RFMO / Sustainability: The Indian Ocean Tuna Commission (IOTC) held its annual meeting from 7 to 11 June 2021. The main priority of the meeting was to discuss how to address the yellowfin tuna stock in the Indian Ocean. The EU was instrumental in reaching agreement on yellowfin tuna, as it accepted a further reduction of 6% in catches is needed, summing up to a total reduction of 21% compared to 2014 catch levels. As such, the EU is the main contributor to the catch reduction scheme[78].

EU / Brexit / Fisheries: The European Commission signed the first annual agreement on fishing with the United Kingdom. This agreement reflects the outcome of the first annual consultations on fishing opportunities between the EU and the UK under the terms of the EU-UK Trade and Cooperation Agreement (TCA). The agreement on the management of key shared stocks secures the fishing rights of both the EU and the UK fleets in EU and UK waters until the end of 2021, as foreseen under the TCA. It establishes the total allowable catches (TAC) for 75 shared fish stocks for 2021, as well as for some deep-sea stocks for 2021 and 2022[79].

EU / Fisheries / Sustainability: On 9 June, the European Commission adopted the Communication "*Towards more sustainable fishing in the EU: state of play and orientations for 2022*". The Communication calls for further efforts to protect marine resources, both through maintaining high levels of ambition within the EU and by striving to achieve the same high standard in the work with non-EU countries[80].

EU / Ghana / IUU: In June, the European Commission, leading the fight against illegal, unreported and unregulated (IUU) fishing worldwide, issued a 'yellow-card' warning to the Republic of Ghana that it risks being identified as a non-cooperating country in the fight against IUU fishing. The decision is based on various shortcomings in Ghana's ability to comply with its duties under international law as a flag, port, coastal or market state[81].

Saudi Arabia / Supply: The Saudi Arabia Fisheries and Aquaculture Market is projected to register a Compound Annual Growth Rate (CAGR) of 4,1% during the forecast period (2020-2025). The drivers identified in this market are growing government support to the sector, the rapid increase in demand, and the increasing sale of fish via social network platforms. The demand for seafood is increasing in the country, owing to increased demand for various aquatic species, such as shrimp and oysters. The average per capita consumption of fish in the country peaked at 11kg during 2017-18, while the global average stood at 19kg. In order to reduce import dependency, the government has undertaken various production-oriented initiatives to satisfy growing demands for seafood[82].

Cambodia / Seafood / Consumption: The Ministry of Agriculture, Forestry and Fisheries of Cambodia announced that fish consumption in Cambodia has increased, with an average consumption of 52,4kg of fish per person per year. Fish consumption by people in low-lying areas has also increased, with communities in such areas consuming 75,6kg of fish on average per person each year. The ministry has also cooperated with the Cambodian Aquaculturist Association to implement the National Strategic Plan for Aquaculture Development 2016-2030. As a result, aquaculture production in 2020 increased by more than 30% compared to 2019[83].

[77] https://ec.europa.eu/oceans-and-fisheries/news/fisheries-control-commission-publishes-study-member-states-sanctioning-systems-infringements_en
[78] https://ec.europa.eu/oceans-and-fisheries/news/sustainable-fisheries-eu-pushes-stricter-catch-limits-yellowfin-tuna-2021-06-11_en
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[83] https://www.phnompenhpost.com/national/cambodias-fish-consumption-despite-supply-market-challenges

7. Macroeconomic Context

7.1. Marine fuel

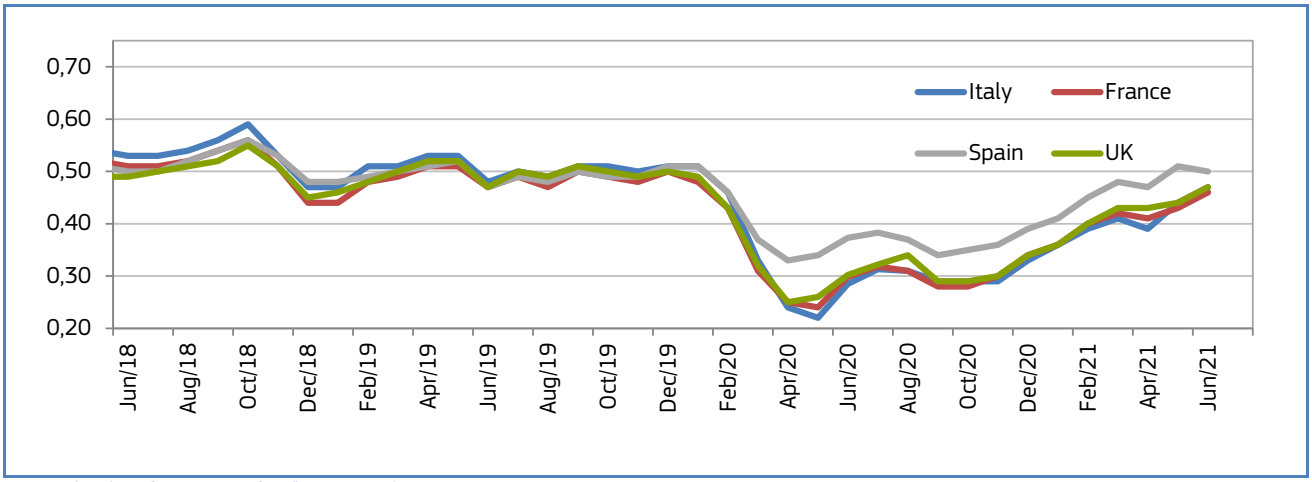
Average prices for marine fuel in **June 2021** ranged between 0,47 and 0,50 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices increased by an average of about 4,4% compared with the previous month and increased by an average of 50,9% compared with the same month in 2020.

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

Member State	June 2021	Change from May 2021	Change from June 2020
France *(ports of Lorient and Boulogne)*	0,46	7%	54%
Italy *(ports of Ancona and Livorno)*	0,47	7%	65%
Spain *(ports of A Coruña and Vigo)*	0,50	-2%	34%
The UK *(ports of Grimsby and Aberdeen)*	0,47	7%	56%

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

Figure 49. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

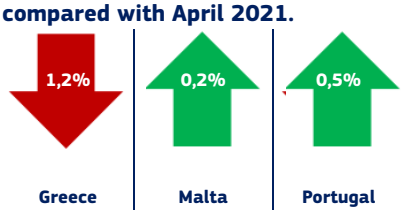


Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

7.2. Consumer prices

The EU annual inflation rate was at 2,3% in May 2021, up from 2,0% in April 2021. A year earlier, the rate was 0,6%.

Inflation: lowest rates in May 2021, compared with April 2021.



Inflation: highest rates in May 2021, compared with April 2021.

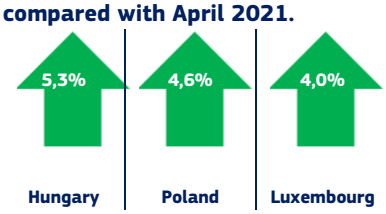


Table 36. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

	May 2019	May 2020	Apr 2021	May 2021	Change from Apr 2021		Change from May 2020	
Food and non-alcoholic beverages	106,87	110,01	110,88	111,24	↑	0,3%	↑	0,2%
Fish and seafood	110,85	113,74	114,14	114,37	↑	0,2%	↑	0,6%

Source: Eurostat.

7.3. Exchange rates

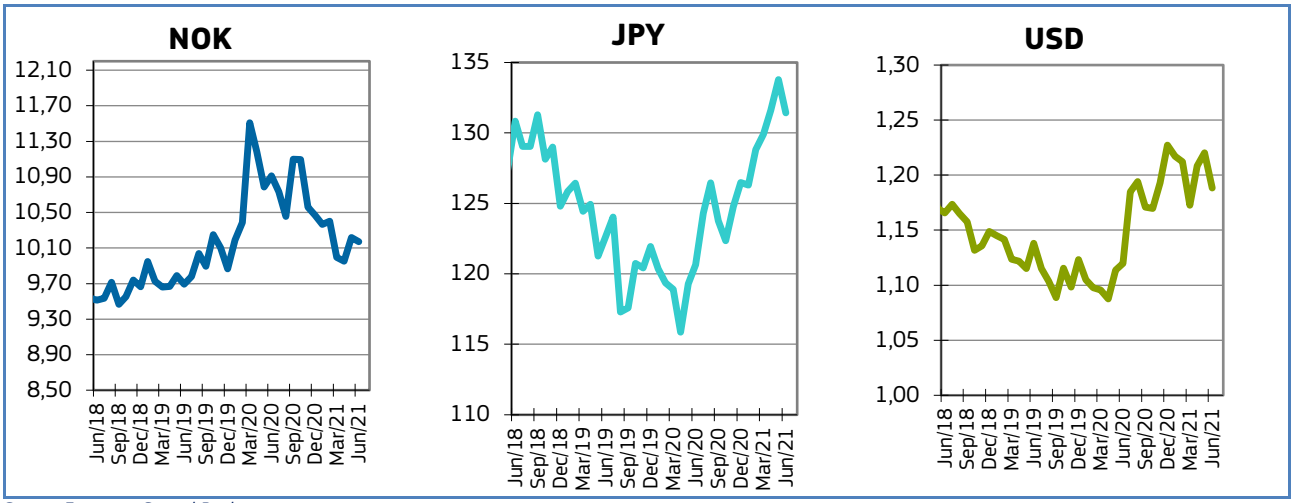
Table 37. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	June 2019	June 2020	May 2021	June 2021
NOK	9,6938	10,9120	10,2183	10,1717
JPY	122,60	120,66	133,79	131,43
USD	1,1400	1,1198	1,2201	1,1844

Source: European Central Bank.

In June 2021, the euro depreciated against the Norwegian krone (0,5%), the Japanese yen (0,1%), and appreciated against the US dollar (1,6%), relative to the previous month. For the past six months, the euro has fluctuated around 1,20 EUR against one US dollar. Compared with June 2020, the euro has appreciated by 8,9% against the Japanese yen, 6,1% against the US dollar, and depreciated by 6,8% against the Norwegian krone.

Figure 50. **TREND OF EURO EXCHANGE RATES**



Source: European Central Bank.

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FOR MORE INFORMATION AND COMMENTS:

Directorate-General for Maritime Affairs and Fisheries
B-1049 Brussels
Tel: +32 229-50101
E-mail: **contact-us@eumofa.eu**

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First sales: EUR-Lex, DG Mare – European Commission, FAO, ICES, Eur-LEX, IUCN, CITES, The Fisheries Secretariat, The Ministry of Agriculture, Nature and Food quality of the Netherlands, Riigi Teateja.

Consumption: EUROPANEL, fishbase.org.

Case studies: European Commission, FAO, Department of Statistics Malaysia, CIA.gov, MIFB.com, seafood-tip.com, Southeast Asian Fisheries Development Centre, International Food Research Journal, Aquaculture Reports, CRC Press, Scient Marina 8351 (CSIC)

Global highlights: DG Mare - European Commission, Reportlinker.com, the Phnom Penh Post.

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

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

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

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

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

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

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