

# Monthly Highlights

No. 2 / 2022

E U M O F A

European Market Observatory for  
Fisheries and Aquaculture Products

## In this issue

*Of the 10 commodity groups (CG), the “bivalves and other molluscs and aquatic invertebrates” CG recorded the fifth highest first sales in value and volume in November 2021.*

*Over the 36-month observation period from November 2018 to November 2021, the weighted average first-sales price of Japanese carpet shell in Spain was 9,92 EUR/kg. This was five-fold higher than in Portugal (1,66 EUR/kg), and 39% greater than in Italy (7,12 EUR/kg).*

*Since the beginning of 2022, both the price and volume of prepared or preserved mackerel fillets from Morocco have demonstrated an upward trend.*

*In the period December 2018 – November 2021, Spanish consumers spent an average of 10,50 EUR per month on a kilogram of miscellaneous tunas.*

*In 2021, EU Trade with Tunisia shows a deficit, amounting to about EUR 80 million.*

*Italy, the biggest importing Member State of swordfish, imported nearly 7.000 tonnes of swordfish at a value of EUR 45 million in 2021.*

*The European Commission has adopted a set of conservation measures to protect six areas defined under the Marine Strategy Framework Directive (MSFD) and five Natura 2000 sites, in the Danish and Swedish parts of the Kattegat.*



## Contents



### First sales in Europe

Great Atlantic scallop (Belgium, France, the Netherlands)

Japanese carpet shell (Italy, Portugal, Spain)



### Extra-EU imports

Weekly average EU import prices of selected products from selected countries of origin



### Consumption

Miscellaneous tunas in Spain



### Case studies

Fisheries and aquaculture in Tunisia

Species profile: swordfish



### Global Highlights



### Macroeconomic context

Marine fuel, consumer prices, and exchange rates



Find all data, information, and more at:  
[www.eumofa.eu](http://www.eumofa.eu)

@EU\_MARE #EUMOFA

## 1. First sales in Europe

Between **January and November 2021**, 12 EU Member States (MSs), Norway, and the United Kingdom reported first-sales data for 10 commodity groups<sup>1</sup>. First-sales data are based on sales notes and data collected from auction markets.

First-sales data analysed in this section, “*First sales in Europe*”, are extracted from EUMOFA<sup>2</sup>, as collected from national administrations.

### 1.1. January–November 2021 compared to the same period in 2020

**Increases in value and volume:** Bulgaria, France, Portugal, and the United Kingdom all recorded increases. A higher supply of clam, sprat, and red mullet in Bulgaria, and octopus and sardine in Portugal, led to the sharp increases experienced in these countries.

**Decreases in value and volume:** Greece, Latvia, the Netherlands, and Sweden all recorded decreases. A decrease in first sales of herring was behind the decline in Sweden.

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

| Country        | January–November 2019 |        | January–November 2020 |        | January–November 2021 |        | Change from January–November 2020 |       |
|----------------|-----------------------|--------|-----------------------|--------|-----------------------|--------|-----------------------------------|-------|
|                | Volume                | Value  | Volume                | Value  | Volume                | Value  | Volume                            | Value |
| Belgium        | 12.424                | 53,1   | 11.316                | 50,5   | 10.494                | 54,0   | -7%                               | 7%    |
| Bulgaria       | 4.784                 | 2,6    | 2.514                 | 1,6    | 3.934                 | 2,8    | 56%                               | 69%   |
| Cyprus         | 1.000                 | 4,0    | 798                   | 3,1    | 792                   | 3,4    | -1%                               | 10%   |
| Estonia        | 59.398                | 14,6   | 60.017                | 15,5   | 58.836                | 15,8   | -2%                               | 2%    |
| France         | 165.187               | 556,8  | 147.819               | 483,6  | 151.004               | 557,7  | 2%                                | 15%   |
| Greece         | 22.581                | 47,5   | 25.808                | 54,8   | 17.572                | 46,9   | -32%                              | -14%  |
| Italy          | 87.114                | 337,3  | 81.490                | 301,6  | 76.699                | 320,5  | -6%                               | 6%    |
| Latvia         | 48.259                | 8,1    | 44.290                | 9,1    | 42.240                | 9,0    | -5%                               | -1%   |
| Lithuania      | 854                   | 0,6    | 2.181                 | 0,9    | 2.385                 | 1,1    | 9%                                | 25%   |
| Netherlands    | 225.971               | 354,0  | 213.727               | 325,2  | 192.912               | 295,8  | -10%                              | -9%   |
| Portugal       | 122.445               | 249,2  | 97.267                | 214,7  | 125.699               | 273,6  | 29%                               | 27%   |
| Spain          | 505.508               | 1476,1 | 479.569               | 1301,5 | 445.626               | 1331,5 | -7%                               | 2%    |
| Sweden         | 170.712               | 86,8   | 127.853               | 73,2   | 83.244                | 51,9   | -35%                              | -29%  |
| Norway         | 2.701.648             | 2480,0 | 2.808.127             | 2368,2 | 2.777.104             | 2512,9 | -1%                               | 6%    |
| United Kingdom | 268.890               | 561,9  | 283.478               | 461,7  | 299.642               | 549,1  | 6%                                | 19%   |

*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.

<sup>1</sup> 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.

<sup>2</sup> First-sales data updated on 02.02.2022.

## 1.2. November 2021 compared to November 2020

**Increases in value and volume:** First sales increased in Cyprus (due to swordfish), France, Latvia, the Netherlands, Portugal (due to sardine and squid), Norway, and the United Kingdom.

**Decreases in value and volume:** First sales decreased in Bulgaria, Greece, Lithuania, and Sweden. Sweden recorded one of the sharpest decreases in relative terms due to decreased sales in herring and sprat.

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

| Country        | November 2019 |       | November 2020 |       | November 2021 |       | Change from November 2020 |       |
|----------------|---------------|-------|---------------|-------|---------------|-------|---------------------------|-------|
|                | Volume        | Value | Volume        | Value | Volume        | Value | Volume                    | Value |
| Belgium        | 1.144         | 5,4   | 1.153         | 4,3   | 1.071         | 6,0   | -7%                       | 40%   |
| Bulgaria       | 312           | 0,3   | 308           | 0,3   | 262           | 0,3   | -15%                      | -2%   |
| Cyprus         | 28            | 0,2   | 23            | 0,2   | 34            | 0,3   | 53%                       | 60%   |
| Estonia        | 9.548         | 1,9   | 7.728         | 1,6   | 7.364         | 1,7   | -5%                       | 3%    |
| France         | 14.284        | 47,1  | 15.393        | 48,9  | 17.320        | 65,6  | 13%                       | 34%   |
| Greece         | 2.338         | 5,7   | 2.081         | 6,1   | 1.781         | 5,7   | -14%                      | -6%   |
| Italy          | 6.898         | 27,7  | 8.100         | 28,8  | 6.031         | 30,1  | -26%                      | 5%    |
| Latvia         | 4.139         | 0,8   | 5.168         | 1,1   | 6.807         | 1,5   | 32%                       | 43%   |
| Lithuania      | 124           | 0,1   | 368           | 0,1   | 319           | 0,1   | -13%                      | -22%  |
| Netherlands    | 4.534         | 19,8  | 11.217        | 22,8  | 24.895        | 36,8  | 122%                      | 61%   |
| Portugal       | 9.634         | 15,3  | 8.089         | 17,3  | 14.020        | 28,4  | 73%                       | 64%   |
| Spain          | 32.292        | 112,4 | 40.600        | 110,2 | 34.909        | 122,0 | -14%                      | 11%   |
| Sweden         | 14.805        | 6,9   | 14.905        | 6,2   | 2.484         | 3,4   | -83%                      | -45%  |
| Norway         | 296.127       | 248,4 | 217.600       | 193,5 | 241.092       | 232,3 | 11%                       | 20%   |
| United Kingdom | 25.630        | 54,1  | 29.374        | 47,9  | 31.956        | 65,9  | 9%                        | 38%   |

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 9 of 2022**) are available via the EUMOFA website and can be accessed [here](#).

The most recent monthly first-sales data **for December 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<sup>3</sup>.

Table 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES<sup>4</sup> IN BELGIUM**


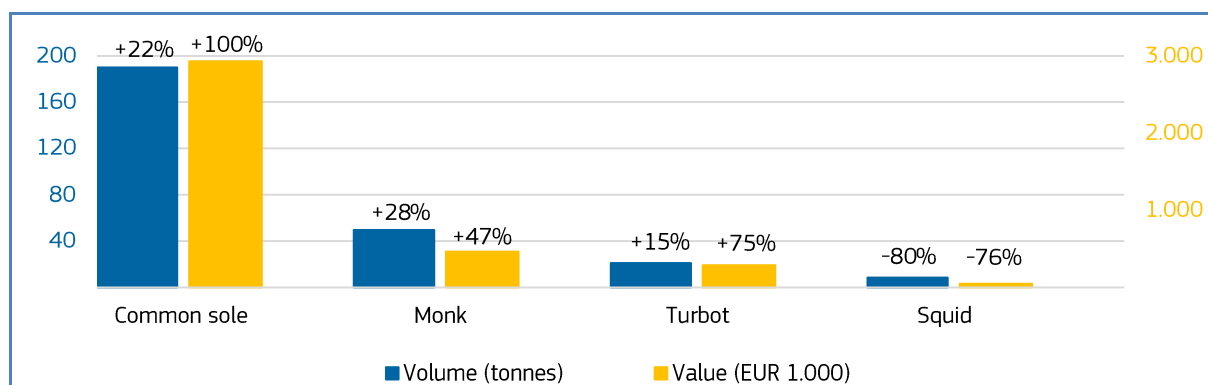

| <br>Belgium | First-sales value / trend % | First-sales volume / trend % | Main contributing species                                                                                               | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------------------------------------------------------------------------------------|-----------------------------|------------------------------|-------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                          | EUR 54,0 million, +7%       | 10.494 tonnes, -7%           | <b>Value:</b> common sole, monkfish, Norway lobster, turbot.<br><b>Volume:</b> ray, European plaice, cuttlefish, squid. | In November 2021 compared to November 2020, <b>squid</b> recorded a large decrease in first sales. Squid prefer cold water and seek refuge in the deep sea during the summer. Therefore, the largest production usually occurs between November and February, when the water temperature is colder. However, during November 2021, in the North Sea area, mild temperatures were observed, with an average recorded temperature of 14°C. Squid production therefore declined. |
| <b>Nov 2021 vs Nov 2020</b>                                                                  | EUR 6,0 million, +40%       | 1.071 tonnes, -7%            | <b>Value:</b> common sole, monkfish.<br><b>Volume:</b> turbot, squid.                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

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



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

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

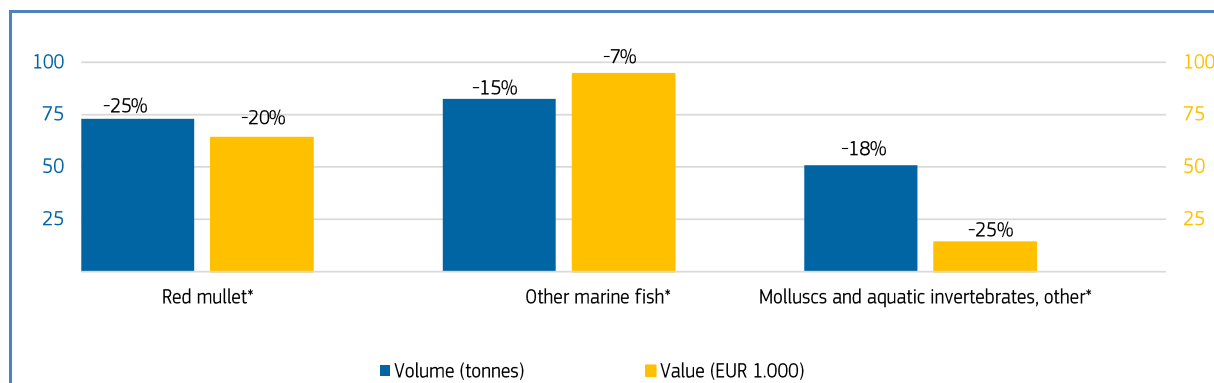
| <br>Bulgaria | First-sales value / trend % | First-sales volume / trend % | Main contributing species                                                 |
|-------------------------------------------------------------------------------------------------|-----------------------------|------------------------------|---------------------------------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                             | EUR 2,8 million, +69%       | 3.934 tonnes, +56%           | Clam, sprat, red mullet, other marine fish*.                              |
| <b>Nov 2021 vs Nov 2020</b>                                                                     | EUR 0,3 million, -2%        | 262 tonnes, -15%             | Red mullet, other marine fish*, other molluscs and aquatic invertebrates* |

<sup>3</sup> First-sales data updated on 01.02.2022.

<sup>4</sup> Data on fisheries and aquaculture products harmonised by EUMOFA, allowing comparisons along the different supply chain stages.



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



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

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


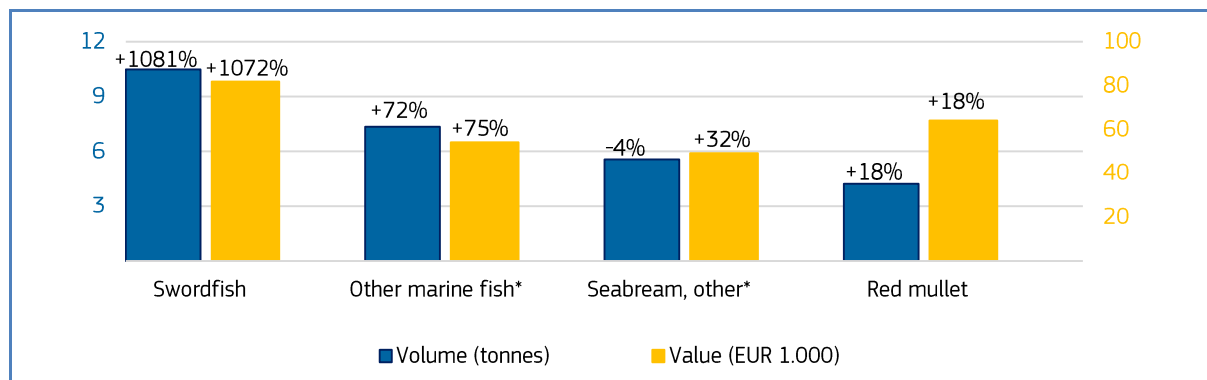
| <br>Cyprus | First-sales value / trend % | First-sales volume / trend % | Main contributing species                                                                      |
|---------------------------------------------------------------------------------------------|-----------------------------|------------------------------|------------------------------------------------------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                         | EUR 3,4 million, +10%       | 792 tonnes, -1%              | <b>Value:</b> swordfish, other marine fish*, other seabream*.<br><b>Volume:</b> albacore tuna. |
| <b>Nov 2021 vs Nov 2020</b>                                                                 | EUR 0,3 million, +60%       | 34 tonnes, +53%              | Swordfish, other marine fish*, other seabream (other than gilthead seabream), red mullet.      |

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



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

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


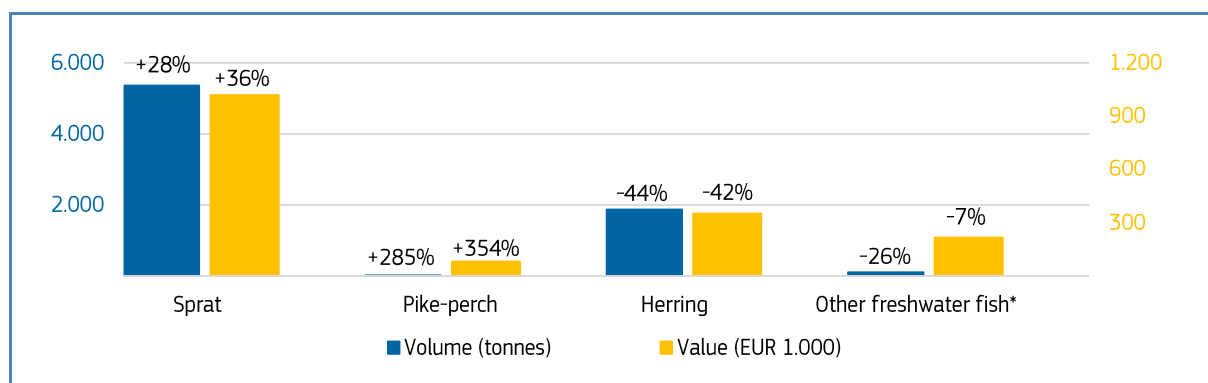
| <br>Estonia | First-sales value / trend % | First-sales volume / trend % | Main contributing species                                                                           |
|------------------------------------------------------------------------------------------------|-----------------------------|------------------------------|-----------------------------------------------------------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                            | EUR 15,8 million, +2%       | 58.836 tonnes, -2%           | <b>Value:</b> sprat, herring.<br><b>Volume:</b> herring, pike-perch, smelt, other freshwater fish*. |
| <b>Nov 2021 vs Nov 2020</b>                                                                    | EUR 1,7 million, +3%        | 7.364 tonnes, -5%            | <b>Value:</b> sprat, pike-perch.<br><b>Volume:</b> herring, other freshwater fish*.                 |

Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, NOVEMBER 2021**

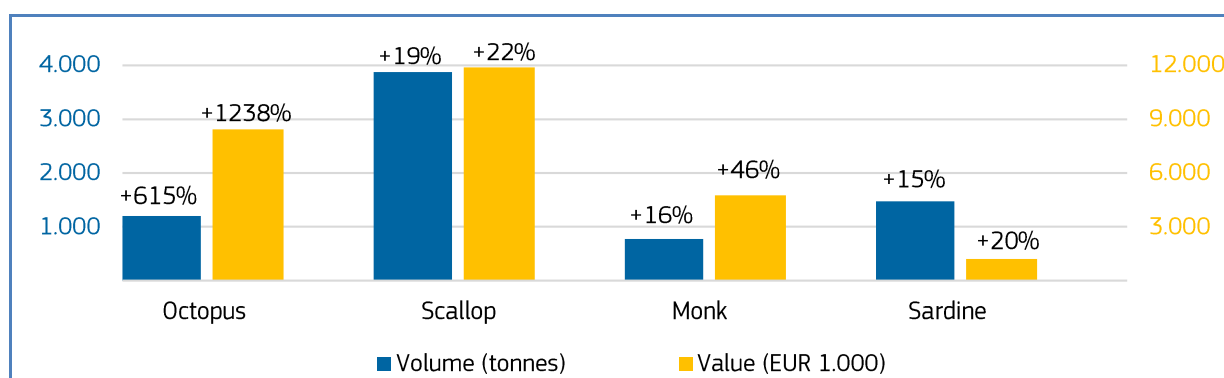


Percentages show change from the previous year. \*EUMOFA aggregation for species

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

| France                       | First-sales value / trend % | First-sales volume / trend % | Main contributing species               | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------------------|-----------------------------|------------------------------|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Jan–Nov 2021 vs Jan–Nov 2020 | EUR 557,7 million, +15%     | 151.004 tonnes, +2%          | Octopus, scallop, monk, Norway lobster. | In November 2021, compared to November 2020, <b>octopus</b> recorded significant increases in first sales. This cephalopod demonstrates strong fluctuations in abundance due to biological and environmental factors. However, evidence has yet to explain the abrupt increase recorded during this period. The main drivers may be linked to climate change and environmental variability, given the sensitivity of these species to changing hydroclimate conditions. Octopus is one of the fisheries and aquaculture products with the highest demand in the last few years and the reference value for the year 2020 (and beforehand) are related to the usual minor quantities fished. |
| Nov 2021 vs Nov 2020         | EUR 65,6 million, +34%      | 17.320 tonnes, +13%          | Octopus, scallop, monkfish, sardine.    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, NOVEMBER 2021**



Percentages show change from the previous year.



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


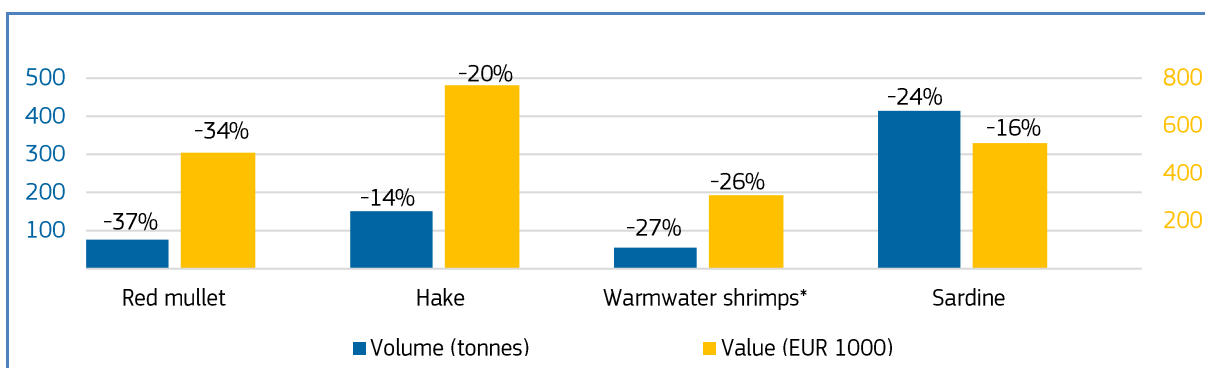
| <br>Greece | First-sales value / trend % | First-sales volume / trend % | Main contributing species                       |
|---------------------------------------------------------------------------------------------|-----------------------------|------------------------------|-------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                         | EUR 46,9 million, -14%      | 17.572 tonnes, -32%          | Anchovy, sardine, miscellaneous tuna*, octopus. |
| <b>Nov 2021 vs Nov 2020</b>                                                                 | EUR 5,7 million, -6%        | 1.781 tonnes, -14%           | Red mullet, hake, warmwater shrimps*, sardine.  |

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GREECE, NOVEMBER 2021**



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

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


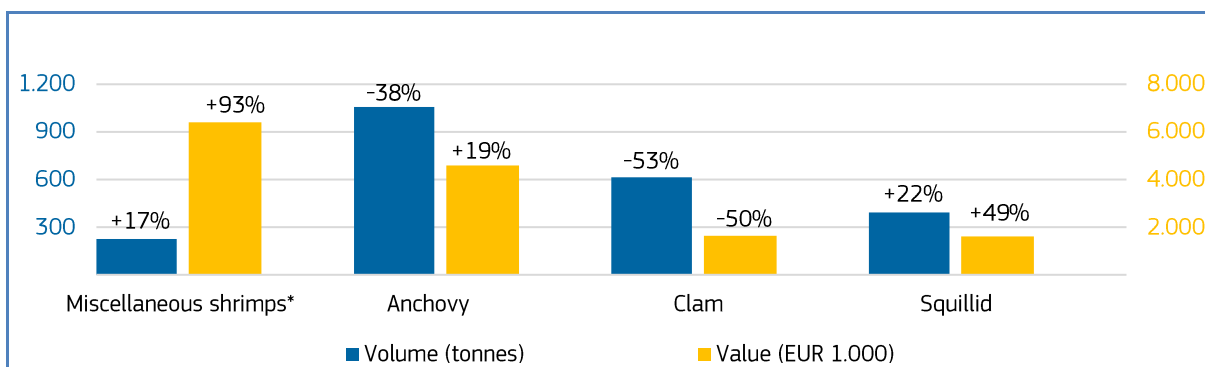
| <br>Italy | First-sales value / trend % | First-sales volume / trend % | Main contributing species                                                                             |
|----------------------------------------------------------------------------------------------|-----------------------------|------------------------------|-------------------------------------------------------------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                          | EUR 320,5 million, +6%      | 76.699 tonnes, -6%           | <b>Value:</b> miscellaneous shrimps*, red mullet, common sole.<br><b>Volume:</b> anchovy, clam, hake. |
| <b>Nov 2021 vs Nov 2020</b>                                                                  | EUR 30,1 million, +5%       | 6.031 tonnes, -26%           | Miscellaneous shrimps, anchovy, clam, squillid.                                                       |

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



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

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


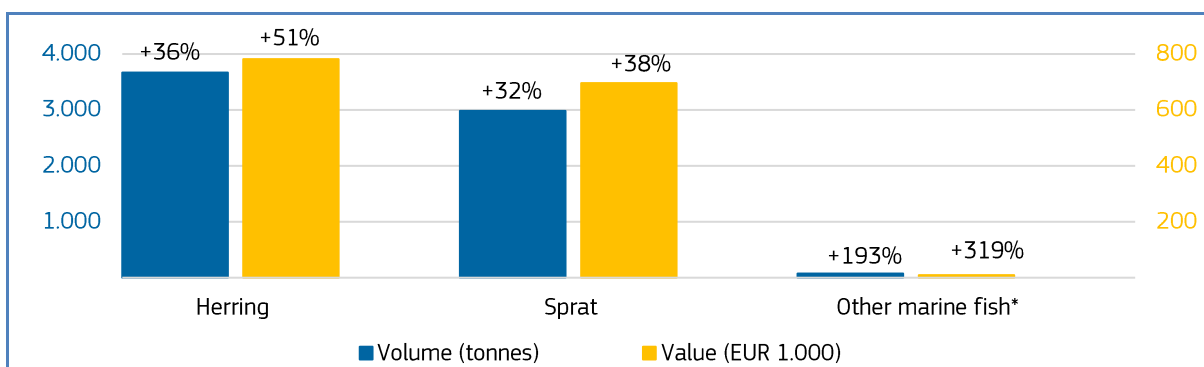
| <br>Latvia | First-sales value / trend % | First-sales volume / trend % | Main contributing species             |
|---------------------------------------------------------------------------------------------|-----------------------------|------------------------------|---------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                         | EUR 9,0 million, -1%        | 42.240 tonnes, -5%           | Sprat, smelt, cod, European flounder. |
| <b>Nov 2021 vs Nov 2020</b>                                                                 | EUR 1,5 million, +43%       | 6.807 tonnes, +32%           | Herring, sprat, other marine fish*.   |

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



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

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


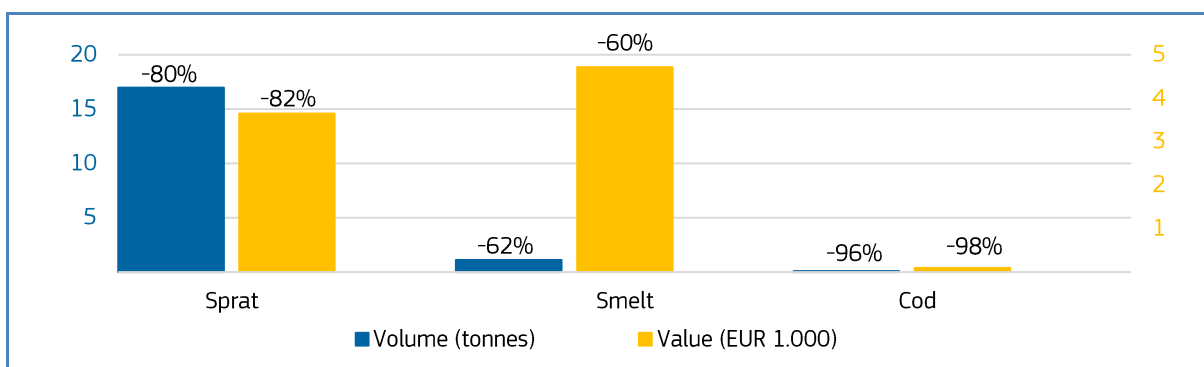
| <br>Lithuania | First-sales value / trend % | First-sales volume / trend % | Main contributing species                  |
|--------------------------------------------------------------------------------------------------|-----------------------------|------------------------------|--------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                              | EUR 1,1 million, +25%       | 2.385 tonnes, +9%            | Smelt, herring, other groundfish*, turbot. |
| <b>Nov 2021 vs Nov 2020</b>                                                                      | EUR 0,09 million, -22%      | 319 tonnes, -13%             | Sprat, smelt, cod.                         |

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



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

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


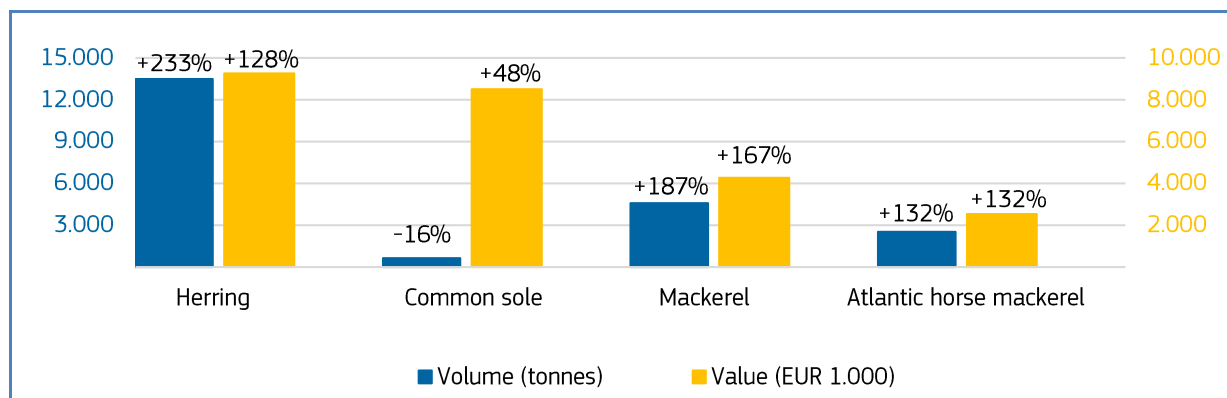

| <br>The Netherlands | First-sales value / trend % | First-sales volume / trend % | Main contributing species                                | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------------------------------------------------------------------|-----------------------------|------------------------------|----------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                                  | EUR 295,8 million, -9%      | 192.912 tonnes, -10%         | Herring, mackerel, blue whiting, European plaice.        | <b>Mackerel</b> fishing in Norwegian waters was hampered by bad weather at the end of September 2021. Very strong winds kept the fleet tied up in port. As a result, the first sales of mackerel over the first 10 months of 2021 was considerably lower than during the first 10 months of 2020, with a decrease of 45%. <b>Herring</b> production in the first 10 months of 2021 was lower than during the first 10 months of 2020, experiencing a decline of 49%. The increase in first sales of <b>Atlantic horse mackerel</b> could be due to the species being targeted by pelagic freezer trawlers in the summer. As a result of this, the production of this species over the first 10 months of 2021 was 6% less than that recorded over the first 10 months of 2020. The increases recorded for mackerel, herring, and Atlantic horse mackerel in November 2021, compared to November 2020, can be seen as compensation (or catch-up) for the observed delay. |
| <b>Nov 2021 vs Nov 2020</b>                                                                          | EUR 36,8 million, +61%      | 24.895 tonnes, +122%         | Herring, common sole, mackerel, Atlantic horse mackerel. |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

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



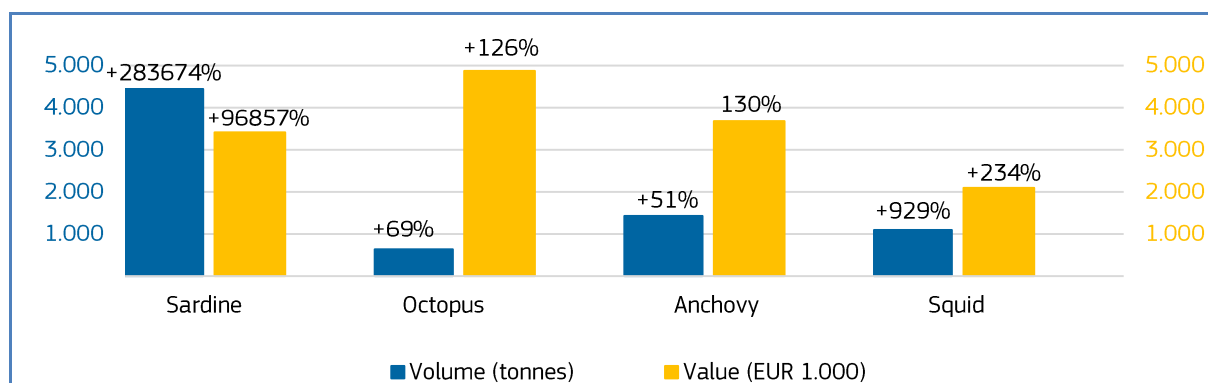
Percentages show change from the previous year.

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

| <br>Portugal | First-sales value / trend % | First-sales volume / trend % | Main contributing species                 | Notes                                                                                                                                                                                                          |
|-------------------------------------------------------------------------------------------------|-----------------------------|------------------------------|-------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                             | EUR 273,6 million, +27%     | 125.699 tonnes, +29%         | Octopus, anchovy, sardine, skipjack tuna. | The recovery of the <b>sardine</b> stock explains the high first-sale figures in November 2021. The fishing season, unless the quota is fully caught earlier, ends on the 30th of November 2021 <sup>5</sup> . |
| <b>Nov 2021 vs Nov 2020</b>                                                                     | EUR 28,4 million, +64%      | 14.020 tonnes, +73%          | Sardine, octopus, anchovy, squid.         |                                                                                                                                                                                                                |

<sup>5</sup> Despacho Nº 11820-A/2021

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, NOVEMBER 2021**

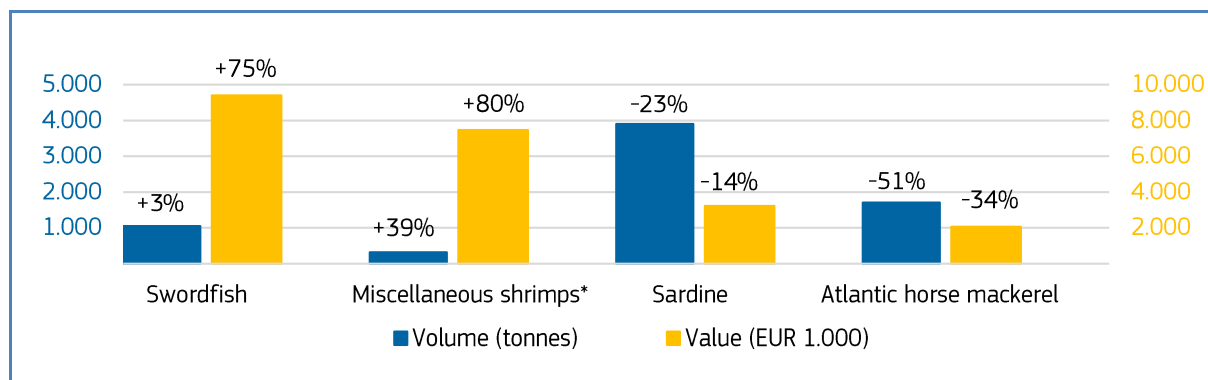


Percentages show change from the previous year.

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

| Spain                               | First-sales value / trend in % | First-sales volume / trend in % | Main contributing species                                                                                                                        |
|-------------------------------------|--------------------------------|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b> | EUR 1,3 billion, +2%           | 445.626 tonnes, -7%             | <b>Value:</b> anchovy, swordfish, miscellaneous shrimps*, octopus.<br><b>Volume:</b> mackerel, Atlantic horse mackerel, monkfish, skipjack tuna. |
| <b>Nov 2021 vs Nov 2020</b>         | EUR 122,0 million, +11%        | 34.909 tonnes, -14%             | <b>Value:</b> swordfish, miscellaneous shrimps*.<br><b>Volume:</b> sardine, Atlantic horse mackerel.                                             |

Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, NOVEMBER 2021**



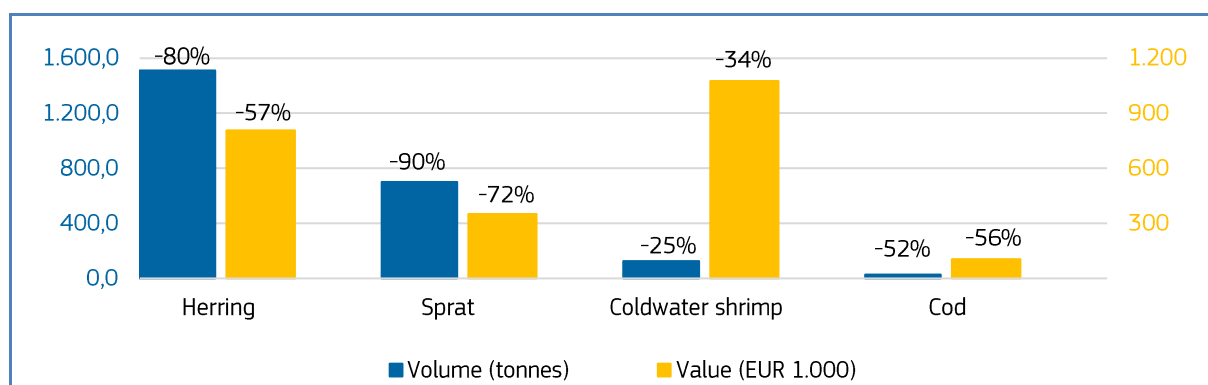
Percentages show change from the previous year. \*EUMOFA aggregation for species

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

| Sweden                              | First-sales value / trend in % | First-sales volume / trend in % | Main contributing species                                            | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------------------|--------------------------------|---------------------------------|----------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b> | EUR 51,9 million, -29%         | 83.244 tonnes, -35%             | Herring, coldwater shrimp, Norway lobster, other groundfish*, sprat. | <b>Herring</b> sales in November 2021 accounted for only 24% of the Swedish fleet's total catches of herring, while in the previous year, they made up 88% of the total. One of the reasons for this decrease in sales might be a reduction in the total allowed catches of herring in the Baltic Sea (-31% from 2020 to 2021). It was observed that catches in Sweden in November 2020 were higher by 28%, while sales in November 2021 were lower by 80%. The decreased supply in November 2021 and sales for human consumption, which was a large part of the quantity sold, caused the price to rise by 117%. <b>Sprat</b> sales in November 2021 accounted for only 15% of the Swedish fleet's total catches of sprat, while sprat sales in November of the previous |
| <b>Nov 2021 vs Nov 2020</b>         | EUR 3,4 million, -45%          | 2.484 tonnes, -83%              | Herring, sprat, coldwater shrimp, cod.                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

|  |  |  |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--|--|--|--|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  |  |  |  | <p>year made up 84% of the Swedish fleet's total catches of sprat. Sweden's catches in November 2020 were greater by 42%, while sales were lower by 90% in November 2021 compared to November 2020. Furthermore, supply increased by 480% and price increased by 119% when comparing November 2021 with October 2021. Insufficient supply in November 2021 and sales for human consumption, which was a large part of the quantity sold, caused a price rise of 175% in November 2021 compared to November 2020. In general, first sales of herring and sprat decreased due to lower supply and, in part, due to the fact that suppliers chose other countries' markets.</p> |
|--|--|--|--|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, NOVEMBER 2021**



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

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


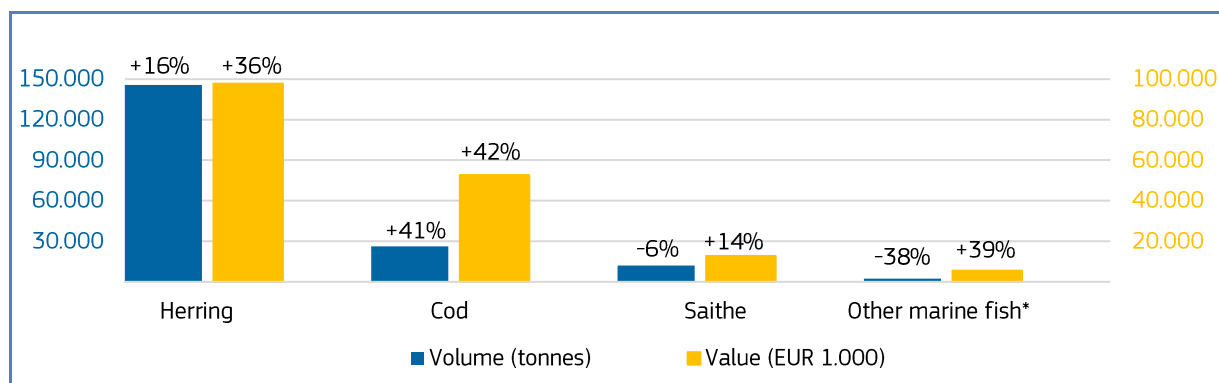
| <br>Norway | First-sales value / trend % | First-sales volume <sup>6</sup> / trend % | Main contributing species                                                                                                |
|-----------------------------------------------------------------------------------------------|-----------------------------|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                           | EUR 2,51 billion, +6%       | 2,8 million tonnes, -1%                   | <b>Value:</b> herring, miscellaneous small pelagics*, crab, mackerel.<br><b>Volume:</b> Blue whiting, other groundfish*. |
| <b>Nov 2021 vs Nov 2020</b>                                                                   | EUR 232,3 million +20%      | 241.092 tonnes, +11%                      | Herring, cod, saithe, other marine fish.                                                                                 |

Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, NOVEMBER 2021**



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

<sup>6</sup> Volume reported in live weight equivalent (LWE)



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


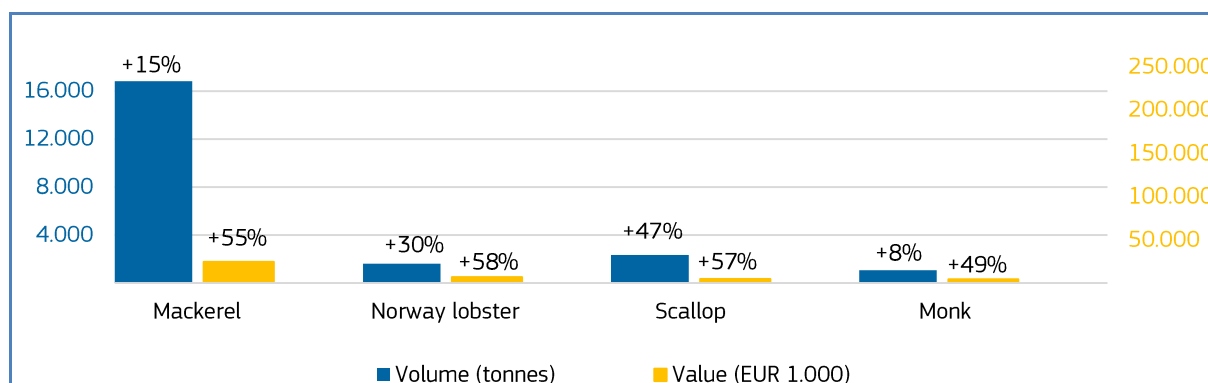
|  The United Kingdom | First-sales value / trend % | First-sales volume / trend % | Main contributing species                                                     |
|------------------------------------------------------------------------------------------------------|-----------------------------|------------------------------|-------------------------------------------------------------------------------|
| <b>Jan–Nov 2021 vs Jan–Nov 2020</b>                                                                  | EUR 549,1 million, +19%     | 299.642 tonnes, +6%          | Norway lobster, lobster <i>Homarus</i> spp., mackerel, herring, blue whiting. |
| <b>Nov 2021 vs Nov 2020</b>                                                                          | EUR 65,9 million, +38%      | 31.956 tonnes, +9%           | Mackerel, Norway lobster, scallop, monkfish.                                  |

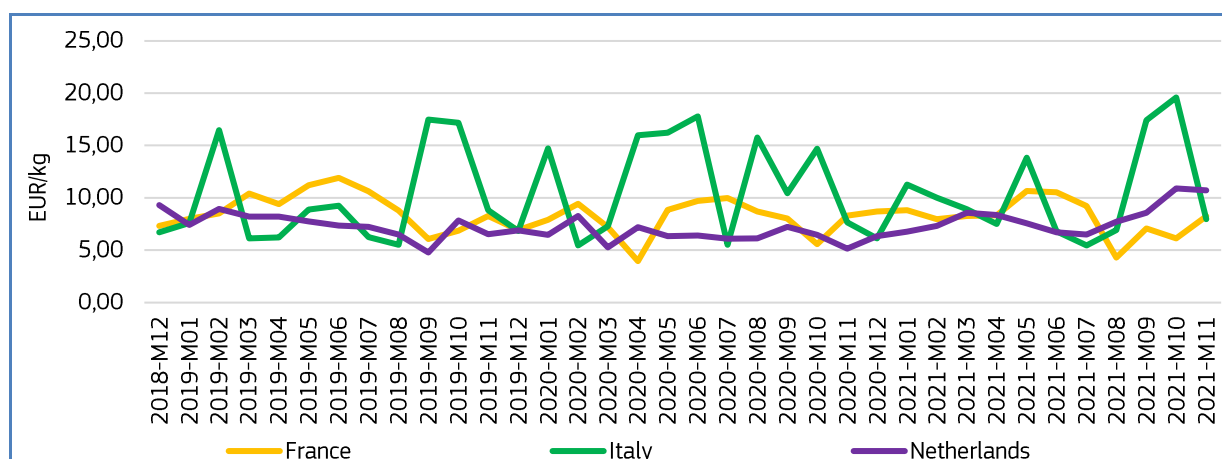
Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, NOVEMBER 2021**



Percentages show change from the previous year.

#### 1.4. Comparison of first-sales prices of selected species in selected countries<sup>7</sup>

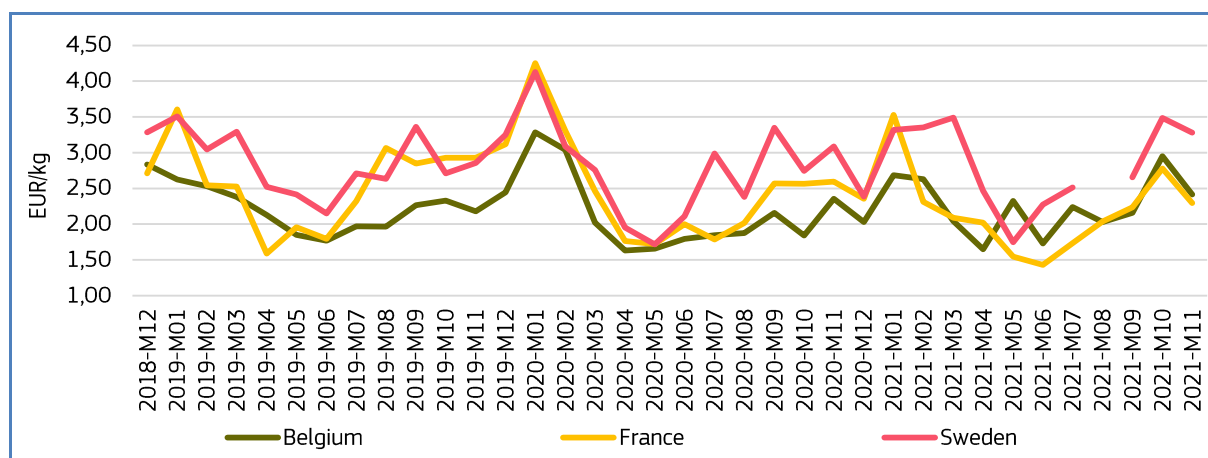
Figure 16. **FIRST-SALES PRICES OF EEL IN FRANCE, ITALY, AND THE NETHERLANDS**



EU first sales of **eel** occur in multiple countries, including **France, Italy, and the Netherlands**. In November 2021, the average first-sales prices of eel were 8,22 EUR/kg in France (up by 34% from the previous month and down by 1% from the previous year); 7,96 EUR/kg in Italy (down from October 2021 by 59%, and up from November 2020 by 4%); and 10,72 EUR/kg in the Netherlands (down from the previous month by 2%, and up from the previous year by 108%). In November 2021, supply increased in the Netherlands by 371% and decreased in both France and Italy (–43% and –13% respectively), relative to the previous year. Volumes sold in the three markets exhibit a clear seasonality with regards to peaks: May–June and November–December in France, December in Italy, and June in the Netherlands. Over the past 36 months, eel prices showed an upward trend in Italy and the Netherlands, and the opposite in France. At the same time, supply showed a downward trend in Italy and the Netherlands, and an upward trend in France due to a peak in supply in October 2020.

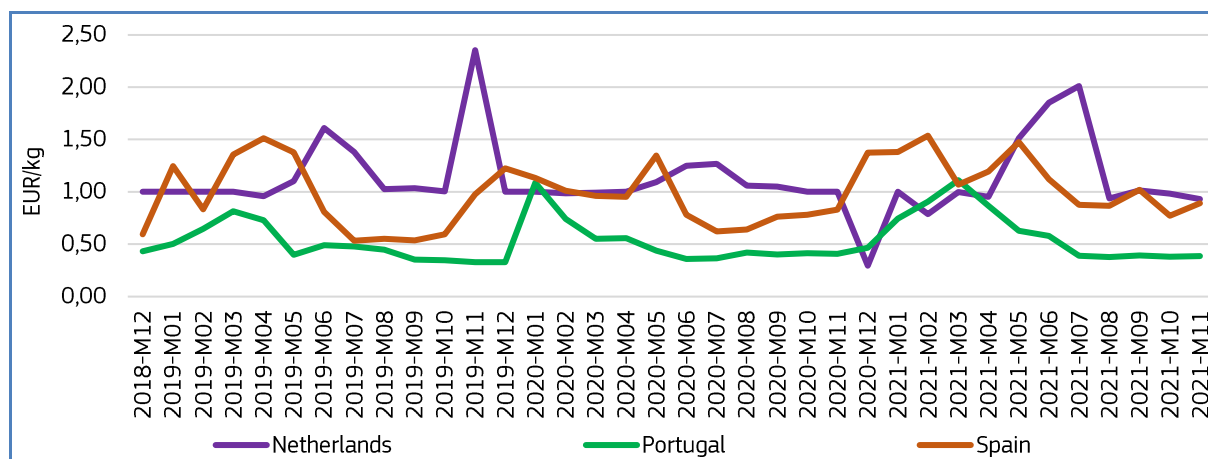
<sup>7</sup> First-sales data updated on 01.02.2022.

Figure 17. **FIRST-SALES PRICES OF LING IN BELGIUM, FRANCE, AND SWEDEN**



EU first sales of **ling** occur predominantly in **France**, as well as in **Belgium** and **Sweden**. In November 2021, the average first-sales prices of ling were: 2,41 EUR/kg in Belgium (down from the previous month by 18%, and up from the previous year by 2%); 2,29 EUR/kg in France (down from both October 2021 and November 2020 by 17% and 12%, respectively); and 3,28 EUR/kg in Sweden (down from the previous month by 6%, and up from the previous year by 6%). In November 2021, supply increased in France (+18%), and decreased in both Belgium and Sweden, relative to the previous year (-7% and -85%, respectively). Supply is seasonal with different peaks in all three markets: March–May and October–November in Belgium, May–July in France, and October–March in Sweden. Over the 36-month period observed, ling prices exhibited a downward trend in Belgium and France and remained stable in Sweden. During the same period, supply showed an increasing trend in Belgium, and the opposite in France and Sweden.

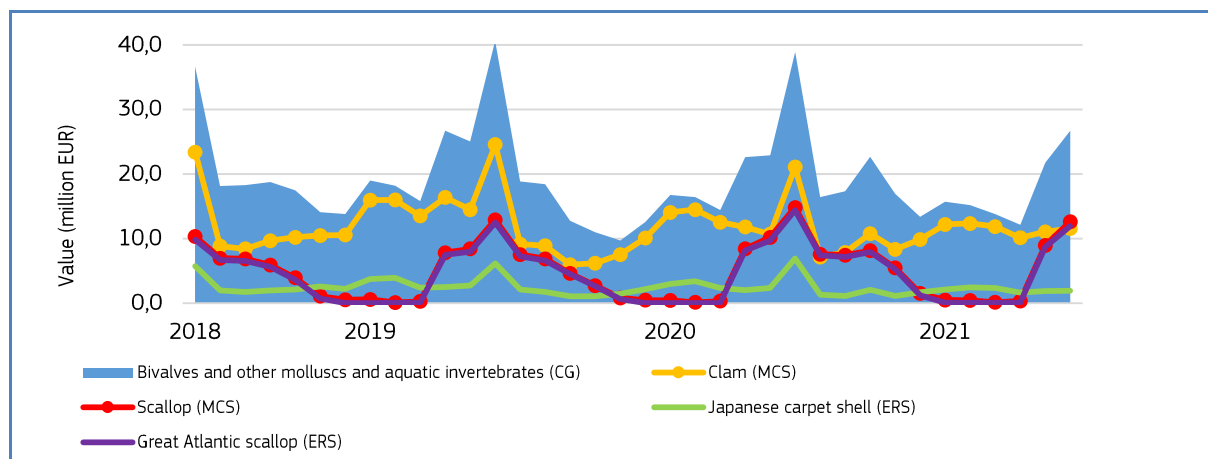
Figure 18. **FIRST-SALES PRICES OF MACKEREL IN THE NETHERLANDS, PORTUGAL, AND SPAIN**



EU first sales of **mackerel** occur predominantly in **Spain**, as well as in **the Netherlands** and **Portugal**. In November 2021, the average first-sales prices of mackerel were 0,93 EUR/kg in the Netherlands (down from both the previous month and year by 5% and 7%, respectively); 0,39 EUR/kg in Portugal (up from October 2021 by 2%, and down from November 2020 by 6%); and 0,89 EUR/kg in Spain (up from the previous month by 15%, and up from the previous year by 7%). In November 2021, supply increased in the Netherlands (+187%), remained unchanged in Portugal, and decreased in Spain (-51%), relative to the previous year. Volumes sold in the three markets are seasonal: in the Netherlands, supply peaks in February–March and October–November; in Portugal between July and November; and in Spain between March and April. Over the past three years, prices have remained stable in the Netherlands and Portugal, and exhibited an upward trend in Spain. At the same time, supply has decreased in all the three markets.

## 1.5. Commodity group of the month: Bivalves<sup>8</sup> and other molluscs and aquatic invertebrates<sup>9</sup>

Figure 19. **FIRST SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES<sup>10</sup>, DECEMBER 2018 - NOVEMBER 2021**



The “**bivalves and other molluscs and aquatic invertebrates**” commodity group (CG<sup>11</sup>) recorded the 7th highest first sales in terms of value and 5th highest first sales in terms of volume of the 10 CGs recorded in November 2021. Across the reporting countries covered by the EUMOFA database, first sales of bivalves reached a value of EUR 26,7 million and a volume of 7.529 tonnes, representing an increase in value of 17% and in volume of 3%, compared to November 2020. In the past 36 months, the highest first-sales value of bivalves was recorded at EUR 40,6 million in December 2019, while the lowest was recorded at EUR 9,7 million in May 2020.

The bivalves and other molluscs and aquatic invertebrates commodity group includes 10 main commercial species (MCS): abalone, clam, jellyfish, mussel *Mytilus* spp., other mussels, oyster, scallop, sea cucumber, sea urchin, other molluscs, and other invertebrates<sup>12</sup>. At the Electronic Recording and Reporting System (ERS) level, Great Atlantic scallop (45%) and Japanese carpet shell (7%) together accounted for 52% of total “bivalves” first-sales value recorded in November 2021.

## 1.6. Focus on Great Atlantic scallop



The great Atlantic scallop (*Pecten maximus*), also called the king scallop, is a marine bivalve mollusc belonging to the family Pectinidae and is found in the North-east Atlantic. It is distributed from Norway to the Atlantic coast of Spain, and throughout the North Sea<sup>13</sup>. In the UK and in the Republic of Ireland it is distributed along the coast. It grows up to 15 cm, lives up to 20 years, and reaches sexual maturity between 2–4 years of age<sup>14</sup>. It is usually partially buried in sand, at depths ranging from 5 to 150 metres. Three methods are traditionally used for harvesting scallops: diving, bottom trawling, and dredging. The main fishing gear used is the scallop dredge. Among European countries, France and the UK catch the most in terms of value<sup>15</sup>. For great Atlantic scallops, current EU legislation specifies a minimum conservation reference size length of 110 mm in the Irish Sea and English Channel, and 100 mm in other fishing areas<sup>16</sup>. Gear selectivity measures and minimum landing sizes (MLS) are common measures to ensure that scallops are not harvested before they grow large enough to breed. The minimum marketing size for scallops is 10 cm<sup>17</sup>.

<sup>8</sup> In the further text bivalves refers to “Bivalves and other molluscs and aquatic invertebrates”

<sup>9</sup> First-sales data updated on 01.02.2022.

<sup>10</sup> Norway and the UK excluded from the analyses.

<sup>11</sup> Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

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

<sup>13</sup> [http://species-identification.org/species.php?species\\_group=mollusca&id=890](http://species-identification.org/species.php?species_group=mollusca&id=890)

<sup>14</sup> <http://www.marlin.ac.uk/biotic/browse.php?sp=4236>

<sup>15</sup> <http://www.fao.org/fishery/species/3516/en>

<sup>16</sup> Regulation (EU) 2019/1241 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32019R1241>

<sup>17</sup> REGULATION (EU) 2015/812 <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=celex%3A32015R0812>

We have covered **great Atlantic scallop** in previous *Monthly Highlights*:

**First sales:** MH 1/2020 (France, Italy, Spain), MH 8/2018 (Belgium, Italy, Portugal), MH6/2017 (France, Italy, Portugal, the United Kingdom), MH8/2016 (Portugal), MH6/2015 (France), MH3/2013 (France)

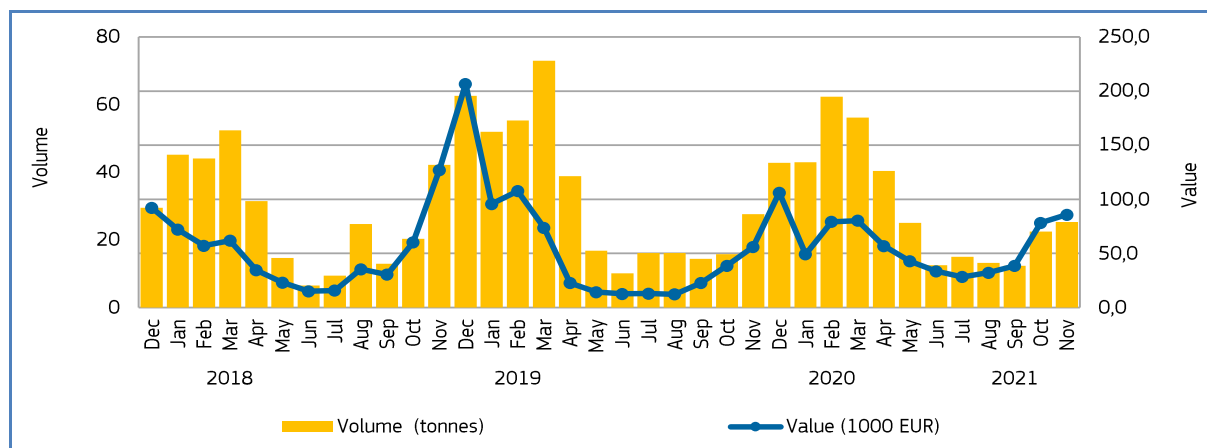
**Topic of the month:** Species profile on great Atlantic scallop (MH4/2021)

## Selected countries

Table 18. **COMPARISON OF GREAT ATLANTIC SCALLOP FIRST SALES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "BIVALVES" IN SELECTED COUNTRIES**

| Great Atlantic scallop |        | Changes in Great Atlantic scallop first sales Jan–Nov 2021 (%) |                          | Contribution of Great Atlantic scallop to total "bivalves" first sales in Nov 2021 (%) | Main places of sale in Jan–Nov 2021 in terms of first-sales value |
|------------------------|--------|----------------------------------------------------------------|--------------------------|----------------------------------------------------------------------------------------|-------------------------------------------------------------------|
|                        |        | Compared to Jan–Nov 2020                                       | Compared to Jan–Nov 2019 |                                                                                        |                                                                   |
| Belgium                | Value  | +29%                                                           | +14%                     | 96%                                                                                    | Oostende, Zeebrugge, Nieuwpoort.                                  |
|                        | Volume | -2%                                                            | +8%                      | 74%                                                                                    |                                                                   |
| France                 | Value  | +26%                                                           | +28%                     | 88%                                                                                    | Dieppe, Port-en-Bessin-Huppain, Saint Quay Portrieux.             |
|                        | Volume | +27%                                                           | +23%                     | 88%                                                                                    |                                                                   |
| Netherlands            | Value  | +29%                                                           | +19%                     | 48%                                                                                    | Vlissingen, Urk, Scheveningen.                                    |
|                        | Volume | -26%                                                           | 0%                       | 6%                                                                                     |                                                                   |

Figure 20. **GREAT ATLANTIC SCALLOP: FIRST SALES IN BELGIUM, DECEMBER 2018 - NOVEMBER 2021**



In **Belgium**, from December 2018 to November 2021, first sales of great Atlantic scallop peaked from December to March each year. The highest first-sales volume was observed in March 2020 when 73 tonnes were sold, while the highest first-sales value of EUR 0,2 million was recorded in March 2019.

Figure 21. **FIRST SALES: COMPOSITION OF “BIVALVES” (ERS LEVEL) IN BELGIUM, IN VALUE AND VOLUME, NOVEMBER 2021**

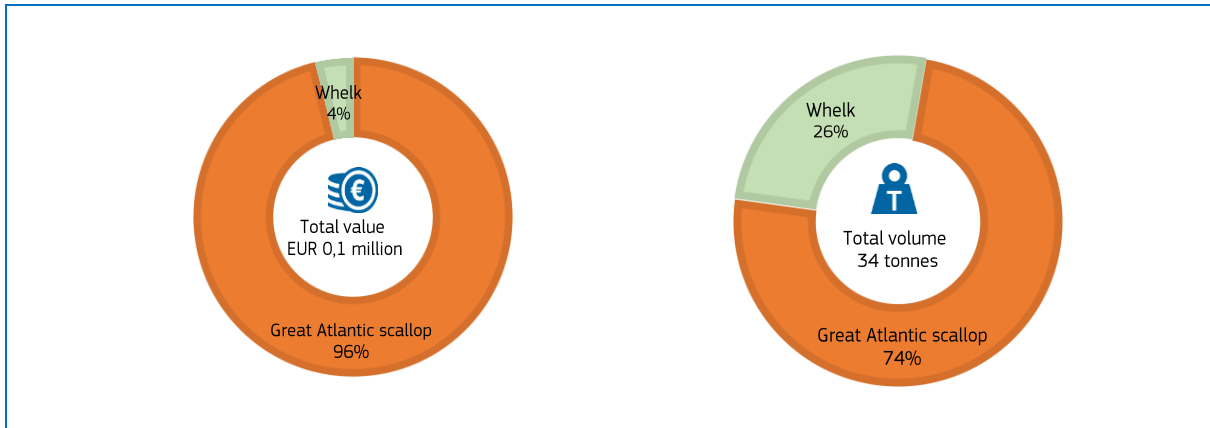
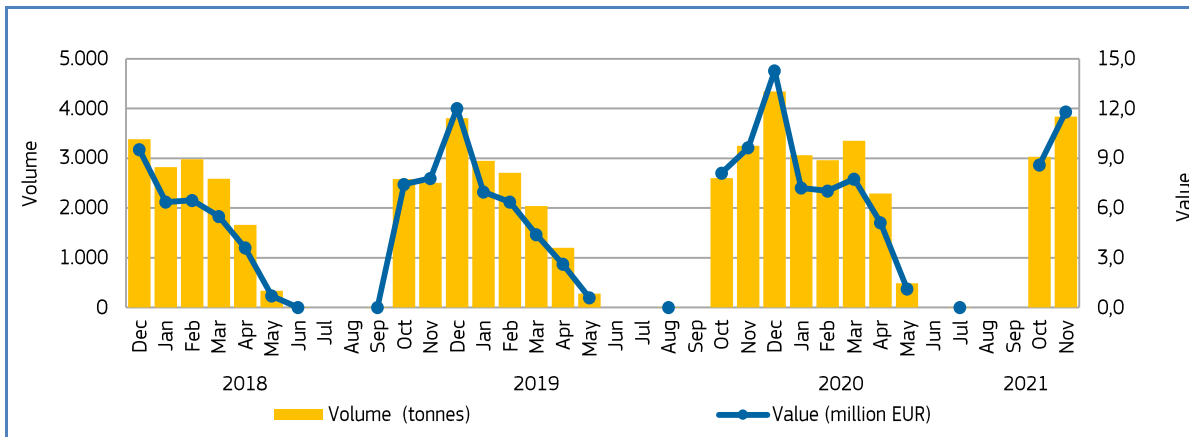


Figure 22. **GREAT ATLANTIC SCALLOP: FIRST SALES IN FRANCE, DECEMBER 2018 – NOVEMBER 2021**



In **France**, from December 2018 to November 2021, the highest first sales of great Atlantic scallop by volume were observed in December 2020, when 4.342 tonnes were sold. The great Atlantic scallop fishery is mainly active from October to April, while there are no fishing activities during the summer season.

Figure 23. **FIRST SALES: COMPOSITION OF “BIVALVES” (ERS LEVEL) IN FRANCE, IN VALUE AND VOLUME, NOVEMBER 2021**

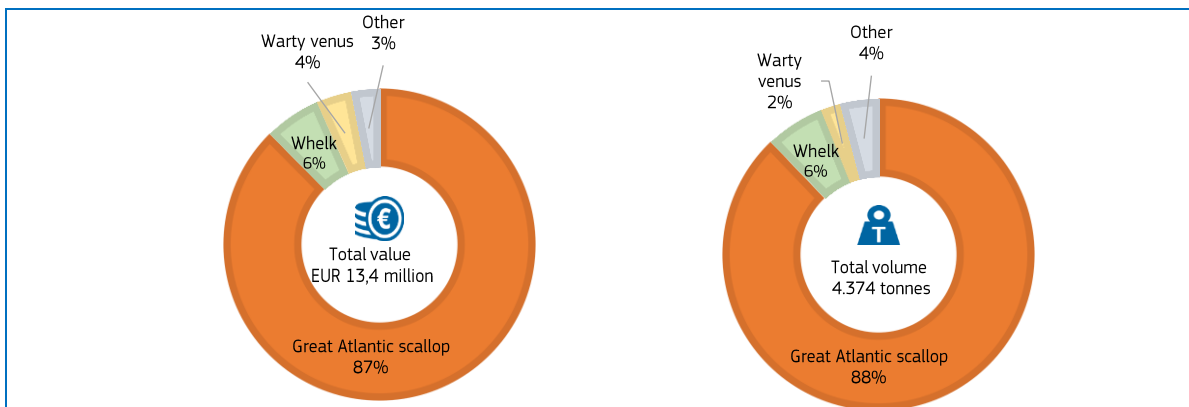
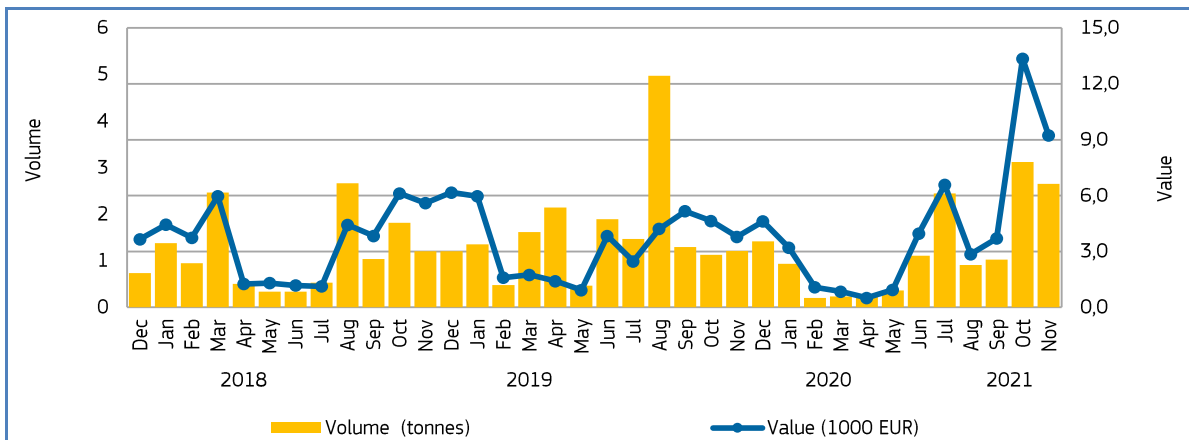
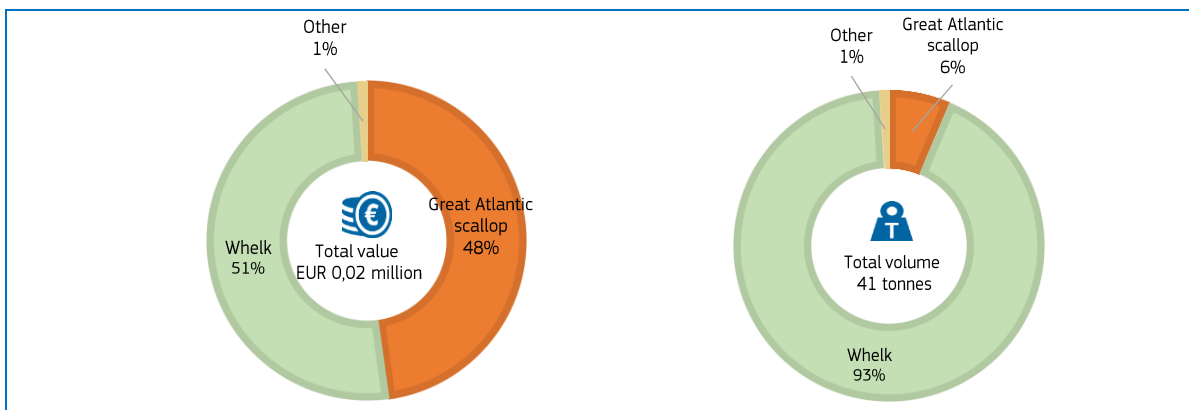


Figure 24. **GREAT ATLANTIC SCALLOP: FIRST SALES IN THE NETHERLANDS, DECEMBER 2018 - NOVEMBER 2021**



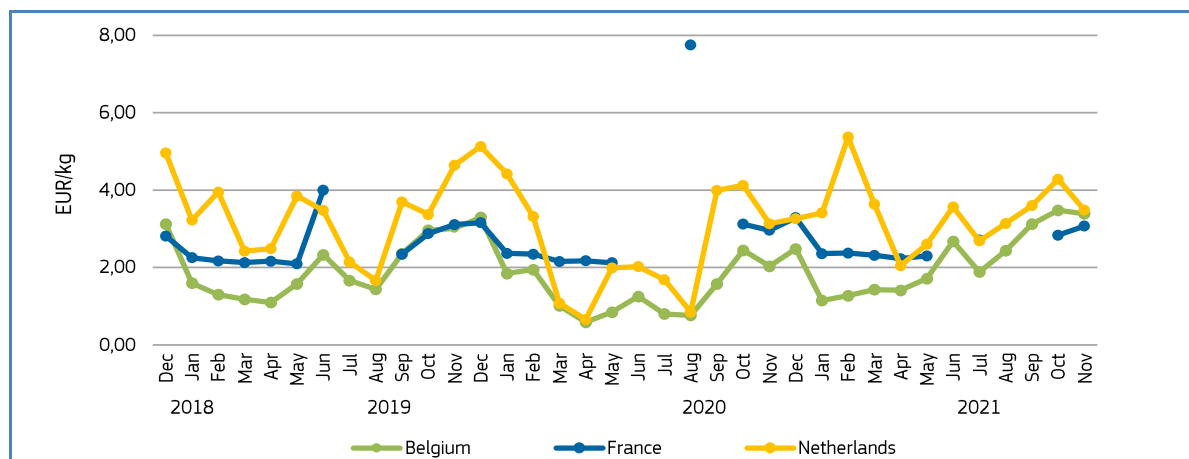
Over the 36 months from December 2018 to November 2021, the highest first-sales volume of great Atlantic scallop in **the Netherlands** occurred in August 2020 and October 2021, when 5 and 3 tonnes were sold, respectively. Due to the lower quantities sold in the Netherlands, first sales tend to fluctuate more often during the year.

Figure 25. **FIRST SALES: COMPOSITION OF “BIVALVES” (ERS LEVEL) IN THE NETHERLANDS, IN VALUE AND VOLUME, NOVEMBER 2021**



## Price trend

Figure 26. **GREAT ATLANTIC SCALLOP: FIRST-SALES PRICES IN SELECTED COUNTRIES, DECEMBER 2018 - NOVEMBER 2021**



Over the 36-month observation period from November 2018 to November 2021, the weighted average first-sales price of great Atlantic scallop in **the Netherlands** was 2,83 EUR/kg, 7% higher than in **France** (2,64 EUR/kg) and 55% greater than that in **Belgium** (1,82 EUR/kg).

In **Belgium**, in November 2021, the average first-sales price of great Atlantic scallop (3,39 EUR/kg) increased by 67% compared with November 2020 and 13% compared with November 2019. Over the observation period from November 2018 to November 2021, the average price ranged from 0,58 EUR/kg for 39 tonnes in April 2020, to 3,48 EUR/kg for 22 tonnes in October 2021.

In **France**, in November 2021, the average first-sales price of great Atlantic scallop (3,07 EUR/kg) increased by 4% and decreased by 1% compared to the same months in 2020 and 2019, respectively. During the observed period, the lowest average price (2,10 EUR/kg for 336 tonnes) was seen in May 2019, while the highest average price was recorded in August 2021, at 7,75 EUR/kg for 5 kg.

In **the Netherlands**, in November 2021, the average first-sales price of great Atlantic scallop (3,48 EUR/kg) increased by 11% compared to November 2020 and decreased by a quarter compared to November 2019. During the observed period, the lowest average price of 0,66 EUR/kg for 2 tonnes was seen in April 2020, while the highest average price was recorded in February 2021, at 5,37 EUR/kg for 201 kg.



## 1.7. Focus on Japanese carpet shell



The Japanese carpet shell (*Ruditapes philippinarum*) is an edible species of saltwater clam in the family Veneridae (the Venus clams). It is a marine bivalve mollusc indigenous to the subtropical and temperate coastal seas of the western Pacific, from the South China Sea to the Sea of Okhotsk, as well as parts of the Indian Ocean. It is a high-value fisheries and aquaculture product that is often cultured<sup>18</sup>. Overfishing and irregular yields of the native (European) grooved carpet shell (*Ruditapes decussatus*) led to imports of *R. philippinarum* into European waters. This species was introduced in 1972 through French hatchery production. Additional imports into the United Kingdom from the USA were followed by numerous transfers within European waters for aquaculture purposes (including in Portugal, Ireland, Spain, and Italy)<sup>19</sup>. Due to its relatively high fecundity and growth rates, it has come to dominate the most suitable habitats such as coastal lagoons. A planktonic larval stage enables local spread once the species has naturalised. Japanese carpet shell populations are now the most major contributor to clam landings in Europe, and are the focus of intensive public fisheries, competing with aquaculture products in several rearing areas. It is mainly caught in dredge fisheries and occasionally bottom trawl fisheries<sup>20</sup>. Once harvested, the clams are stored in boxes or bags and transported for mechanical grading. Then they are usually wet stored to purge grit and sand before processing and marketing. In Europe, Japanese carpet shell is mainly sold as a fresh product<sup>21</sup>. In the EU, the species is managed through technical measures set in the EU Regulation<sup>22</sup>.

We have covered **Japanese carpet shell** in previous *Monthly Highlights*:

**First sales:** MH 1/2019 (France, Italy, Spain).

## Selected countries

Table 19. **COMPARISON OF JAPANESE CARPET SHELL FIRST SALES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF BIVALVES IN SELECTED COUNTRIES**

| Japanese carpet shell |        | Changes in Japanese carpet shell first sales Jan–Nov 2021 (%) |                          | Contribution of Japanese carpet shell to total “bivalves” first sales in Nov 2021 (%) | Main places of sale in Jan–Nov 2021 in terms of first-sales value |
|-----------------------|--------|---------------------------------------------------------------|--------------------------|---------------------------------------------------------------------------------------|-------------------------------------------------------------------|
|                       |        | Compared to Jan–Nov 2020                                      | Compared to Jan–Nov 2019 |                                                                                       |                                                                   |
| Italy                 | Value  | -15%                                                          | +23%                     | 3%                                                                                    | Marano Lagunare, Grado, Chioggia.                                 |
|                       | Volume | -29%                                                          | +9%                      | 1%                                                                                    |                                                                   |
| Portugal              | Value  | +20%                                                          | -10%                     | 6%                                                                                    | Setúbal, Sesimbra, Aveiro.                                        |
|                       | Volume | +30%                                                          | 0%                       | 8%                                                                                    |                                                                   |
| Spain                 | Value  | -16%                                                          | -32%                     | 20%                                                                                   | Campelo, Cambados, Cabo De Cruz – Boiro.                          |
|                       | Volume | -43%                                                          | -55%                     | 9%                                                                                    |                                                                   |

<sup>18</sup> <https://www.cabi.org/jisc/datasheet/61697>

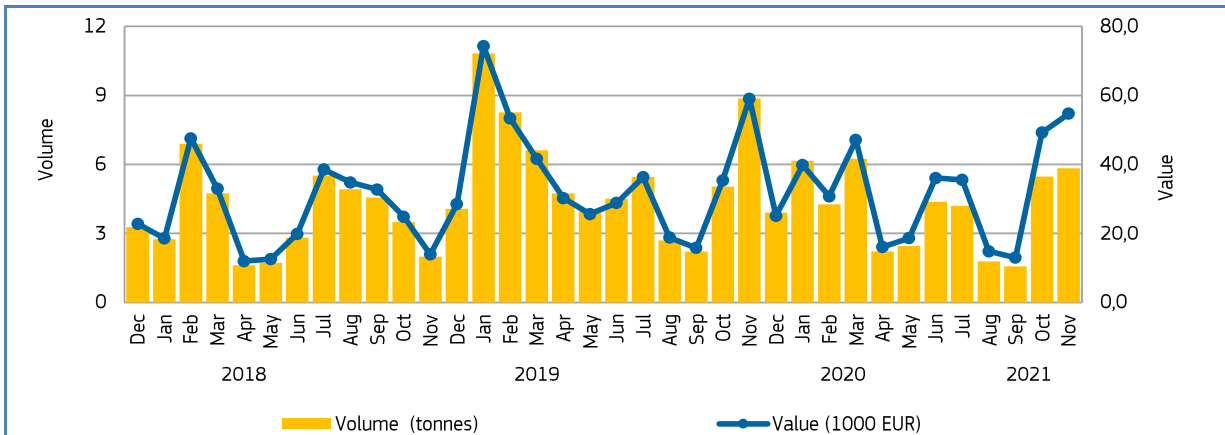
<sup>19</sup> <https://thefishsite.com/articles/cultured-aquatic-species-japanese-carpet-shell>

<sup>20</sup> <http://fishsizematters.eu/en/species/grooved-carpetshell-and-japanese-carpetshell/>

<sup>21</sup> <https://thefishsite.com/articles/cultured-aquatic-species-japanese-carpet-shell>

<sup>22</sup> EC Regulation (EU) 2019/1241 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02019R1241-20211230>

Figure 27. JAPANESE CARPET SHELL: FIRST SALES IN ITALY, DECEMBER 2018 - NOVEMBER 2021



In **Italy**, over the observed 36-month period (December 2018 - November 2021), the highest first sales (by volume) of Japanese carpet shell occurred in January and November 2020, when 11 tonnes and 9 were sold, respectively. First sales are greatest during the fishery season in winter and spring, while the lowest sales occur during warmer periods.

Figure 28. FIRST SALES: COMPOSITION OF "BIVALVES" (ERS LEVEL) IN ITALY, IN VALUE AND VOLUME, NOVEMBER 2021

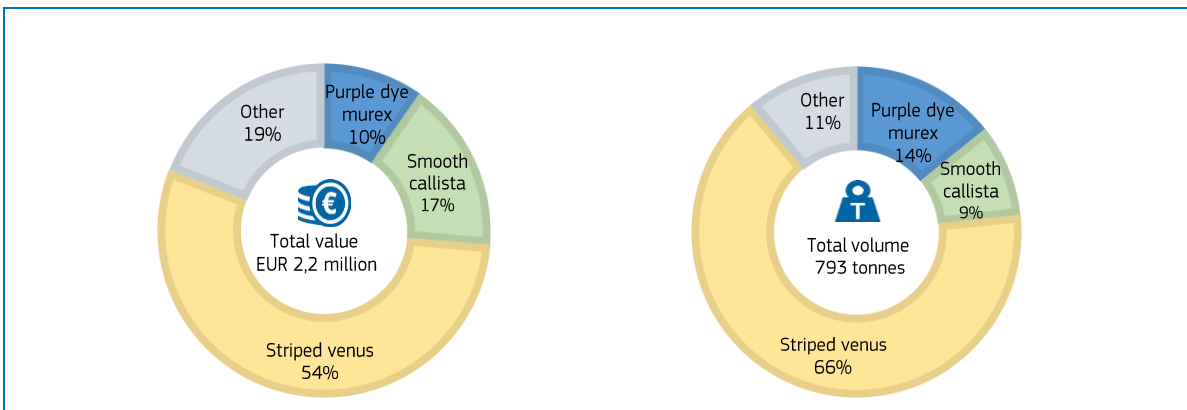
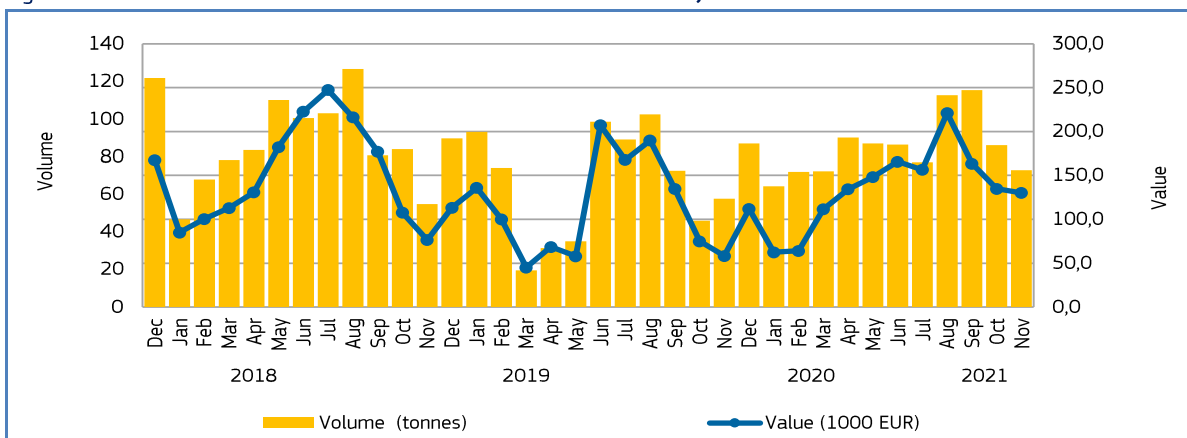


Figure 29. JAPANESE CARPET SHELL: FIRST SALES IN PORTUGAL, DECEMBER 2018 - NOVEMBER 2021



In **Portugal** from December 2018 to November 2021, the highest first sales of Japanese carpet shell were registered in August 2019 and December 2018, when 127 and 122 tonnes were sold, respectively. The lowest sales were recorded in March and April 2020 (20 and 31 tonnes, respectively).

Figure 30. **FIRST SALES: COMPOSITION OF “BIVALVES” (ERS LEVEL) IN PORTUGAL, IN VALUE AND VOLUME, NOVEMBER 2021**

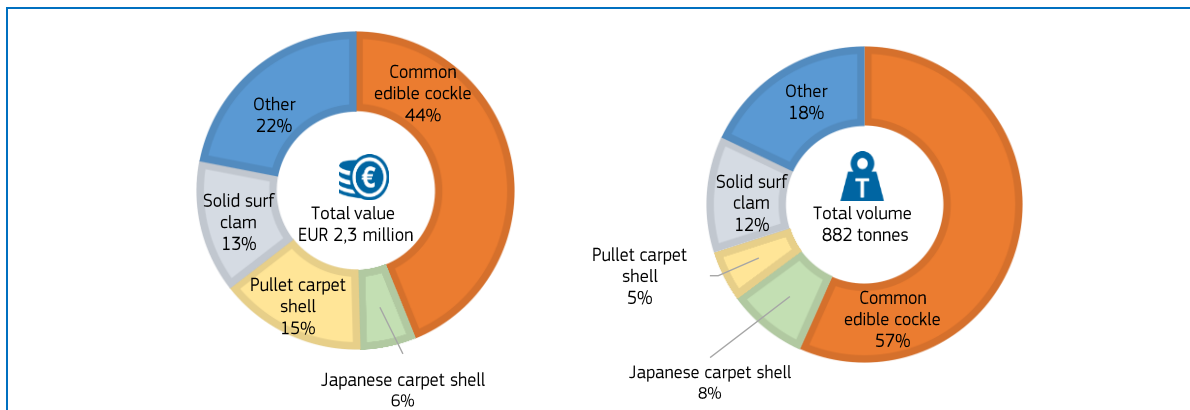
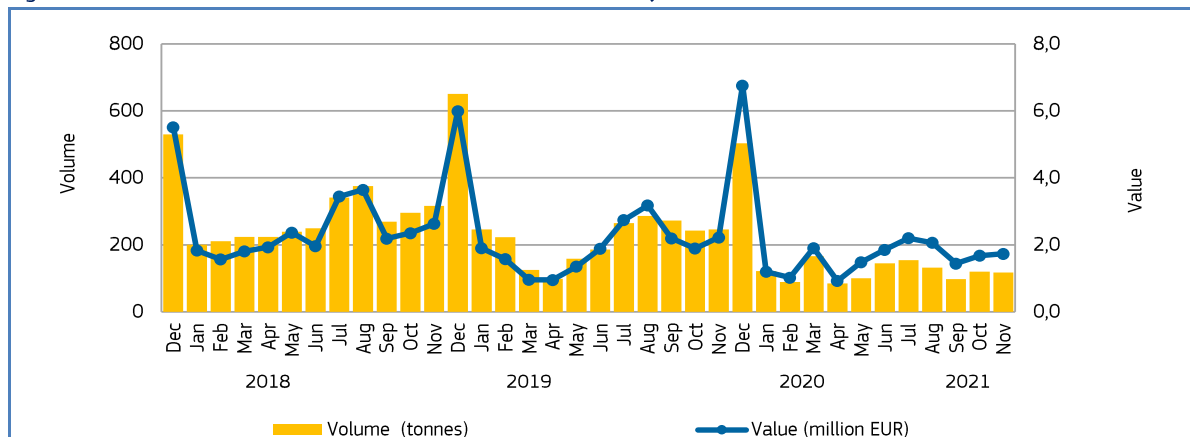
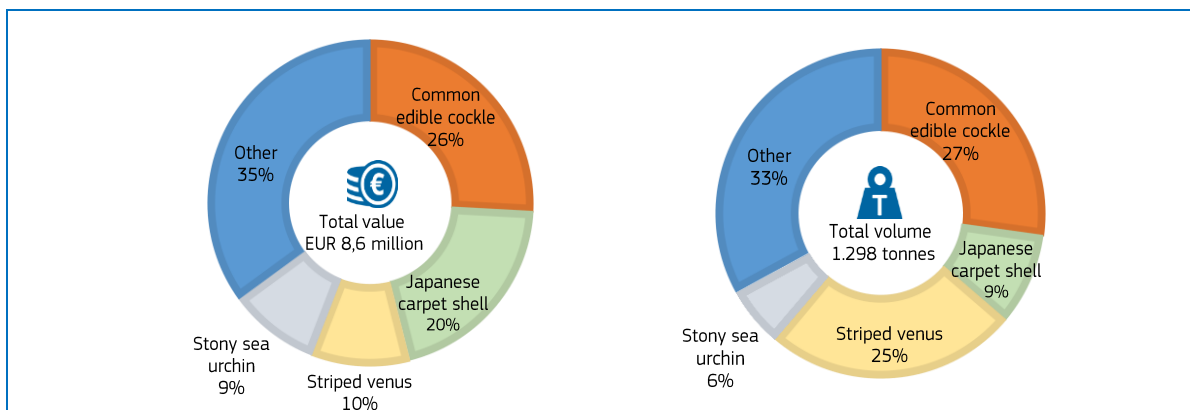


Figure 31. **JAPANESE CARPET SHELL: FIRST SALES IN SPAIN, DECEMBER 2018 – NOVEMBER 2021**



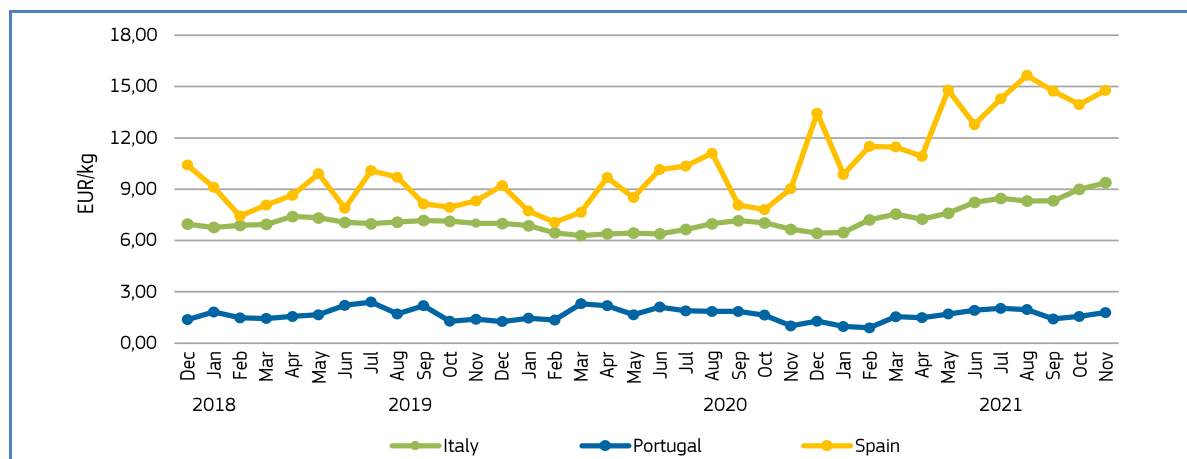
In **Spain**, over the 36-month observation period from December 2018 to November 2021, the highest first sales of Japanese carpet shell were registered in December 2018, 2019, and 2020, when 530, 651, and 503 tonnes were sold, respectively. In Spain in 2021, the Japanese carpet shell fishery recorded lower first sales in terms of volume but higher first sales in terms of average prices, compared to the previous two years analysed.

Figure 32. **FIRST SALES: COMPOSITION OF “BIVALVES” (ERS LEVEL) IN SPAIN, IN VALUE AND VOLUME, NOVEMBER 2021**



## Price trend

Figure 33. **JAPANESE CARPET SHELL: FIRST-SALES PRICE IN SELECTED COUNTRIES\* (DECEMBER 2018 - NOVEMBER 2021)**



Over the 36-month observation period from November 2018 to November 2021, the weighted average first-sales price of Japanese carpet shell in **Spain** was 9,92 EUR/kg. This was five-fold higher than in **Portugal** (1,66 EUR/kg), and 39% greater than in **Italy** (7,12 EUR/kg). The difference in price between the products that originated in the three different countries is linked to the product quality, namely the size and colour of the shell.

In **Italy**, in November 2021, the average first-sales price of Japanese carpet shell was 9,38 EUR/kg, 41% higher than in November 2020, and 34% greater than in November 2019. The lowest price in the past 36 months was registered in March 2020, at 6,29 EUR/kg for 7 tonnes, while the highest price of 9,38 EUR/kg for 6 tonnes was observed in November 2021.

In **Portugal**, in November 2021, the average first-sales price of Japanese carpet shell was 1,79 EUR/kg, representing a 77% increase compared to November 2020 and a 28% increase compared to November 2019. The lowest price experienced in the 36-month observation period was registered in February 2021 at 0,89 EUR/kg for 72 tonnes, while the highest price of 2,40 EUR/kg for 103 tonnes was observed in July 2019.

In **Spain**, in November 2021, the average first-sales price of Japanese carpet shell was 14,78 EUR/kg. This was 64% higher than in November 2020 and 78% above November 2019. Between December 2018 and November 2021, the lowest price was registered in February 2020 at 7,07 EUR/kg for 223 tonnes, while the highest price of 15,65 EUR/kg for 132 tonnes was observed in August 2021.

## 2. Extra-EU imports

The weekly extra-EU import prices (weighted average values per week, in EUR per kg) for nine different species are examined every month. The three most relevant species in terms of value and volume remain consistent: fresh whole Atlantic salmon from Norway, frozen Alaska pollock fillets from China, and frozen tropical shrimp (*Penaeus* spp.) from Ecuador. The other six species change each month; three are chosen from the commodity group of the month, and three are randomly selected. The commodity group for this month is “bivalves”, and the featured species are frozen mussels, even in shell, from New Zealand, live, chilled or fresh scallops from the United States, and prepared or preserved mussels in airtight containers (excl. smoked) from Chile. The three randomly selected species this month are fresh or chilled fillets of swordfish from Chile, prepared or preserved filets of mackerel from Morocco, and prepared or preserved eels, whole or in pieces from China.

Data analysed in the section “Extra-EU imports” are extracted from EUMOFA, as collected from the European Commission<sup>23</sup>.

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

| Extra-EU Imports                                                                                            |                        | Week 02/2022 | Preceding 4-week average | Week 02/2021  | Notes                                                                                                                                                                                                                                          |
|-------------------------------------------------------------------------------------------------------------|------------------------|--------------|--------------------------|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Fresh whole Atlantic salmon imported from Norway</b> ( <i>Salmo salar</i> , CN code 03021400)            | <b>Price (EUR/kg)</b>  | 6,90         | 6,66 (+4%)               | 4,73 (+46%)   | In 2021, prices ranged from 4,64 to 6,94 EUR/kg and had an upward trend, in contrast with a downward trend over the past three years. On average, in 2021, prices were below 6,00 EUR/kg. The upward trend continued at the beginning of 2022. |
|                                                                                                             | <b>Volume (tonnes)</b> | 12.813       | 11.802 (+9%)             | 15.321 (-16%) | Volumes ranged from 6.189 to 19.090 tonnes and had an upward trend in 2021, in line with the past three years. On average, in 2021, weekly volumes were below 15.000 tonnes.                                                                   |
| <b>Frozen Alaska pollock fillets imported from China</b> ( <i>Theragra chalcogramma</i> , CN code 03047500) | <b>Price (EUR/kg)</b>  | 3,19         | 3,07 (+4%)               | 2,45 (+31%)   | Over the past three years, weekly prices showed a stable trend. However, in 2021, they exhibited an upward trend. This was also seen in the first two weeks of 2022, when they rose above 3,00 EUR/kg.                                         |
|                                                                                                             | <b>Volume (tonnes)</b> | 2.425        | 2.763 (-12%)             | 2.681 (-10%)  | In 2021, volumes fluctuated from 1.417 to 3.686 tonnes. They had an upward trend, in contrast with the trend over the past three years. On average, the weekly supply was around 2.400 tonnes.                                                 |
| <b>Frozen tropical shrimp imported from Ecuador</b> (genus <i>Penaeus</i> , CN code 03061792)               | <b>Price (EUR/kg)</b>  | 6,36         | 6,36 (0%)                | 5,28 (+20%)   | Weekly prices had an upward trend in 2021, in contrast with a downward trend over the past three years. In 2021, weekly prices were around 5,60 EUR/kg, on average. In 2022, they were above 6,00 EUR/kg.                                      |
|                                                                                                             | <b>Volume (tonnes)</b> | 2.127        | 2.697 (-21%)             | 1.182 (+80%)  | Volume showed an upward trend in 2021, in line with the trend over the past three years. Weekly volumes fluctuated from 1.118 to 4.925 tonnes. On average, the weekly supply was around 2.800 tonnes.                                          |

<sup>23</sup> Last update: 02.02 2022

Figure 34. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY, 2019–2022**

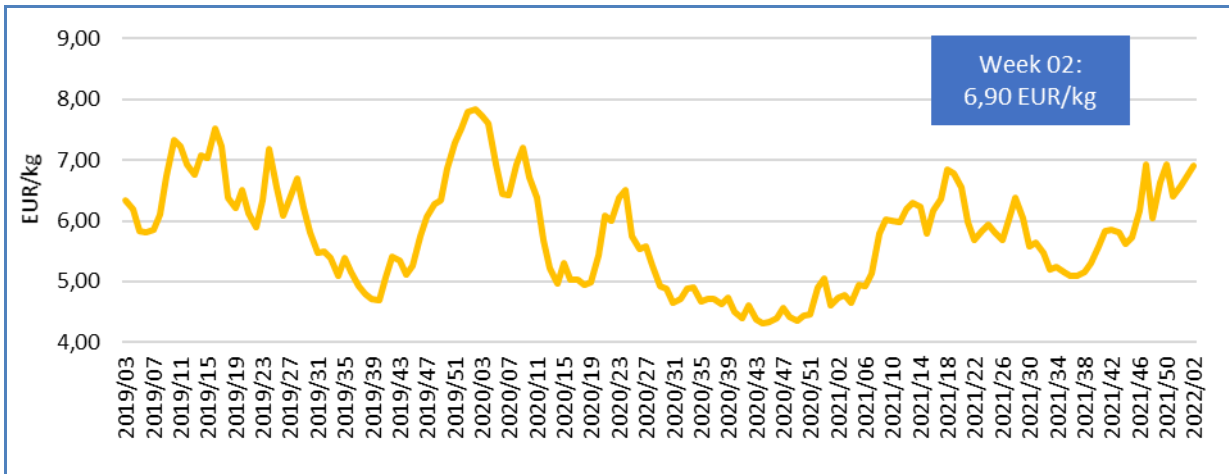


Figure 35. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2019–2022**

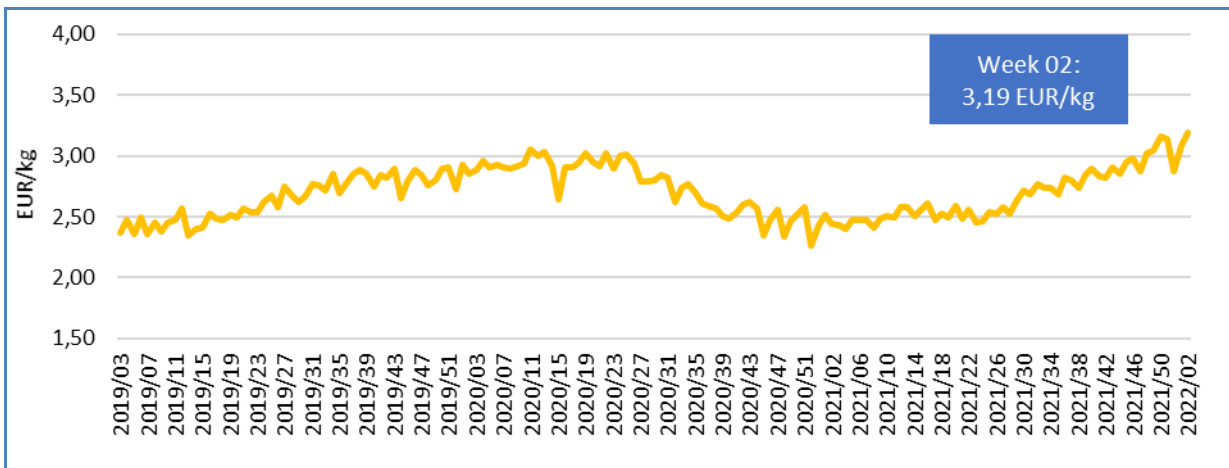


Figure 36. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2019–2022**

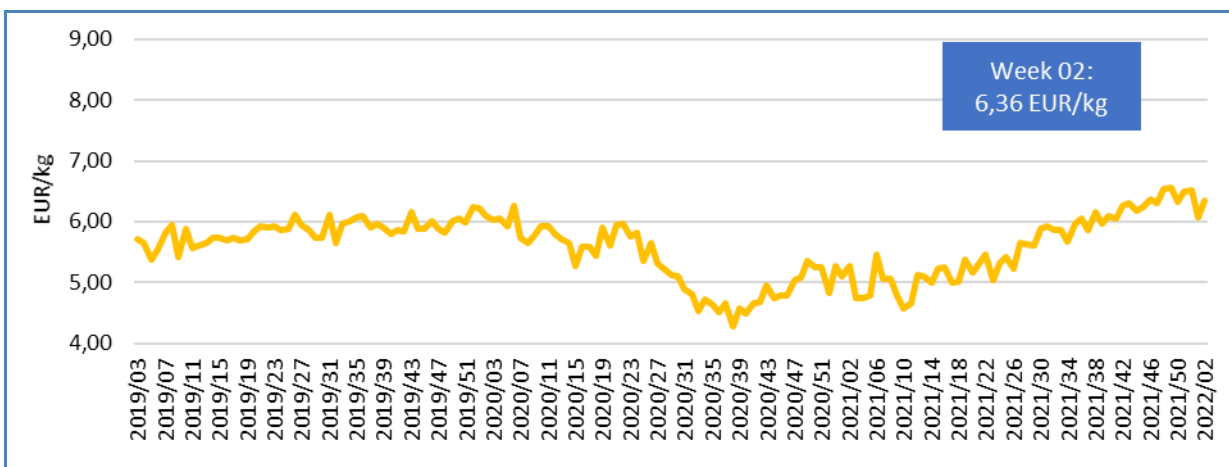


Table 21. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

| Extra-EU Imports                                                                                                                                                                                    |                        | Week 02/2022 | Preceding 4-week average | Week 02/2021  | Notes                                                                                                                                                                                                               |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|--------------|--------------------------|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Frozen mussels, even in shell, imported from New Zealand (<i>Perna</i> spp., CN code 03073290)</b>                                                                                               | <b>Price (EUR/kg)</b>  | 5,41         | 5,57 (-3%)               | 5,67 (-5%)    | Downward trend over the past three years. Prices fluctuated from 1,65 EUR/kg (in week 34 of 2020) to 6,96 EUR/kg (week 41 of 2019). Price drop did not correlate with an increase in supply from the previous week. |
|                                                                                                                                                                                                     | <b>Volume (tonnes)</b> | 31           | 77 (-60%)                | 112 (-73%)    | Downward trend over the past three years. High fluctuations in supply from 0,3 tonnes (in week 52 of 2020) to 1.958 tonnes (week 01 of 2021). Most of the weekly supply was less than 100 tonnes.                   |
| <b>Live (fresh or chilled) scallops, incl. queen scallops, of the genera <i>Pecten</i>, <i>Chlamys</i> or <i>Placopecten</i>, even in shell, imported from the United States (CN code 03072100)</b> | <b>Price (EUR/kg)</b>  | 26,11*       | 41,60** (-37%)           | 26,11*** (0%) | Upward trend over the past three years. Price ranged from 17,85 EUR/kg (in week 18 of 2020) to 48,96 EUR/kg (week 20 of 2020). Price spike did not correlate with a decrease in supply from the previous week       |
|                                                                                                                                                                                                     | <b>Volume (tonnes)</b> | 4*           | 1** (+326%)              | 4*** (0%)     | Downward trend over the past three years. Fluctuations in supply, from 0,027 tonnes (in week 12 of 2020) to 22 tonnes (week 51 of 2019). Most of the weekly volumes were less than 5 tonnes.                        |
| <b>Prepared or preserved mussels in airtight containers (excl. smoked), imported from Chile (CN code 16055310)</b>                                                                                  | <b>Price (EUR/kg)</b>  | 1,95         | 2,58 (-25%)              | 2,35 (-17%)   | Stable trend from 2019 to 2022, with prices fluctuating from 1,63 EUR/kg (in week 21 of 2021) to 4,47 EUR/kg (week 01 of 2021). 75% of the weekly prices were over 2,00 EUR/kg.                                     |
|                                                                                                                                                                                                     | <b>Volume (tonnes)</b> | 20           | 53 (-63%)                | 65 (-70%)     | Downward trend from 2019 to 2022. High fluctuations in supply from 0,040 (week 50 of 2021) to 484 tonnes (week 31 of 2021); most volumes were over 100 tonnes.                                                      |

\* Data refers to week 52 of 2021 (the most recent available); \*\* data refers to weeks 48 to 51 of 2021; \*\*\* data refers to week 52 of 2020

Figure 37. **IMPORT PRICE OF FROZEN MUSSELS, EVEN IN SHELL, FROM NEW ZEALAND, 2019–2022**

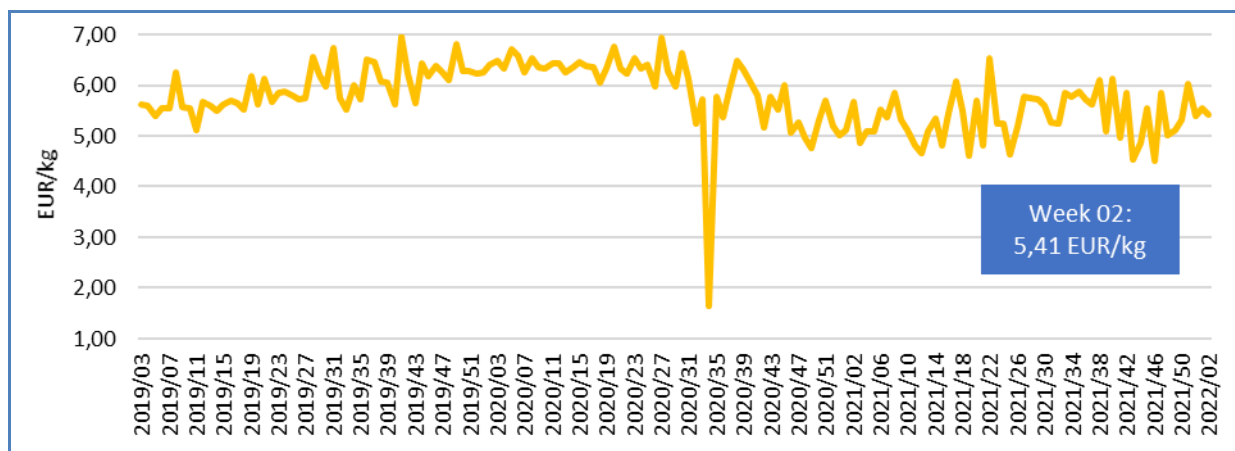




Figure 38. **IMPORT PRICE OF LIVE (FRESH OR CHILLED) SCALLOPS, INCL. QUEEN SCALLOPS, FROM THE UNITED STATES, 2019–2022**

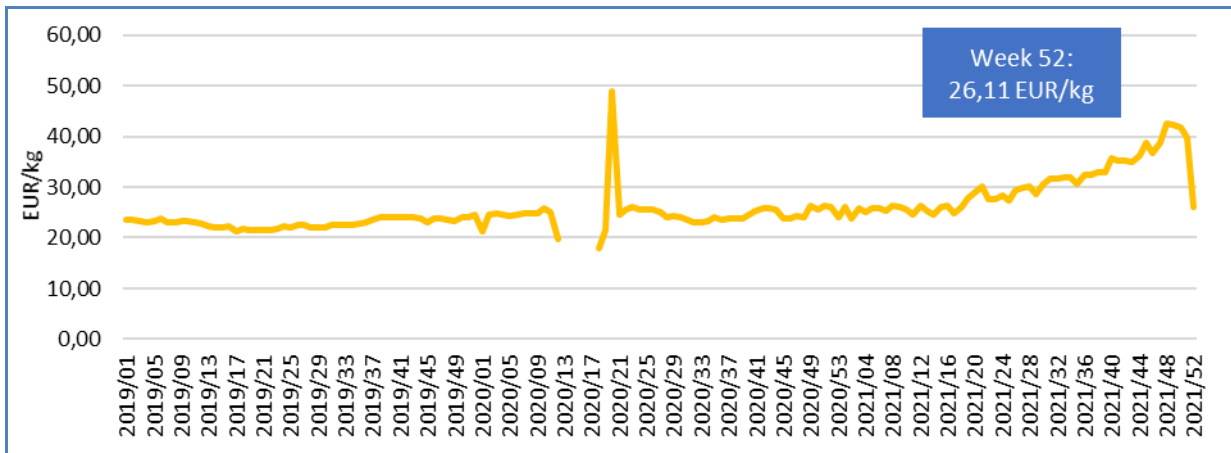
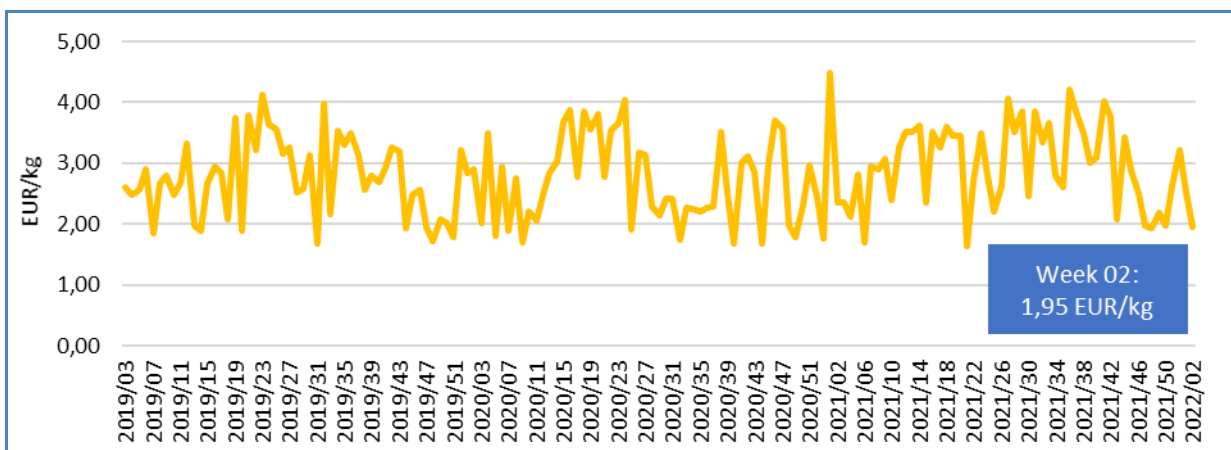


Figure 39. **IMPORT PRICE OF PREPARED OR PRESERVED MUSSELS IN AIRTIGHT CONTAINERS (EXCL. SMOKED) FROM CHILE, 2019–2021**



Since the beginning of 2021, both price and volume of frozen mussels from New Zealand showed an upward trend. Price ranged from 4,49 to 6,53 EUR/kg, and weekly supply from 2 to 1.958 tonnes.

In 2021, both weekly price and volume of live (fresh or chilled) scallops, incl. queen scallops, from the United States, showed an upward trend. Price ranged from 23,72 to 42,65 EUR/kg, and volume from 0,4 to 4,3 tonnes.

Weekly price of prepared or preserved mussels in airtight containers from Chile showed a stable trend since the beginning of 2021. At the same time, weekly volume showed a downward trend. Price ranged from 1,63 to 4,47 EUR/kg, and volume from 0,040 to 484 tonnes.

Table 22. **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 52/2021 | Preceding 4-week average | Week 52/2021    | Notes                                                                                                                                                                                                                                                                        |
|----------------------------------------------------------------------------------------------------------------------------------------------|------------------------|--------------|--------------------------|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Fresh or chilled swordfish fillets imported from Chile</b> ( <i>Xiphias gladius</i> , CN code 03044500)                                   | <b>Price (EUR/kg)</b>  | 12,33*       | 11,87** (+4%)            | 10,90*** (+13%) | Upward trend from 2019 to 2022. Prices ranged from 8,82 (week 45 of 2019) to 12,39 EUR/kg (week 39 of 2021). Most of the weekly prices were less than 10 EUR/kg.                                                                                                             |
|                                                                                                                                              | <b>Volume (tonnes)</b> | 13*          | 15** (-13%)              | 9*** (+55%)     | Fluctuations in supply, varying between 2 tonnes (in weeks 45 of 2019 and 08 of 2020) and 477 tonnes (week 32 of 2019). Overall downward trend.                                                                                                                              |
| <b>Prepared or preserved mackerel fillets imported from Morocco</b> ( <i>Scomber scombrus</i> , <i>Scomber japonicus</i> , CN code 16041511) | <b>Price (EUR/kg)</b>  | 11,58        | 11,93 (-3%)              | n/a             | Upward trend over the past three years. Some price spikes were related to a drop in supply from the previous week. Price fluctuations, varying from 0,83 EUR/kg (in week 37 of 2021) to 12,89 EUR/kg (week 50 of 2021).                                                      |
|                                                                                                                                              | <b>Volume (tonnes)</b> | 0,02         | 0,11 (-78%)              | n/a             | Downward trend over the past three years. High fluctuations in supply from 0,002 tonnes (in week 37 of 2021) to 45 tonnes (week 17 of 2019).                                                                                                                                 |
| <b>Prepared or preserved eels, whole or in pieces, imported from China</b> (CN code 16041700)                                                | <b>Price (EUR/kg)</b>  | 17,65        | 18,54 (-5%)              | 14,11 (+25%)    | Slight upward trend from 2019 to 2021, with prices ranging from 5,99 EUR/kg (in week 42 of 2019) to 53,30 EUR/kg (week 33 of 2021). The price spike correlated with a significant decrease in supply from the previous week. Most of the prices were less than 20,00 EUR/kg. |
|                                                                                                                                              | <b>Volume (tonnes)</b> | 17           | 32 (-48%)                | 10 (+67%)       | From 2019 to 2021, volumes ranged between 0,004 tonnes (in week 13 of 2020) and 70 tonnes (week 38 of 2021), with an overall downward trend.                                                                                                                                 |

\* Data refers to week 41 of 2021 (the most recent available);\*\* data refers to weeks 36 to 39 of 2021;\*\*\*data refers to week 41 of 2020.

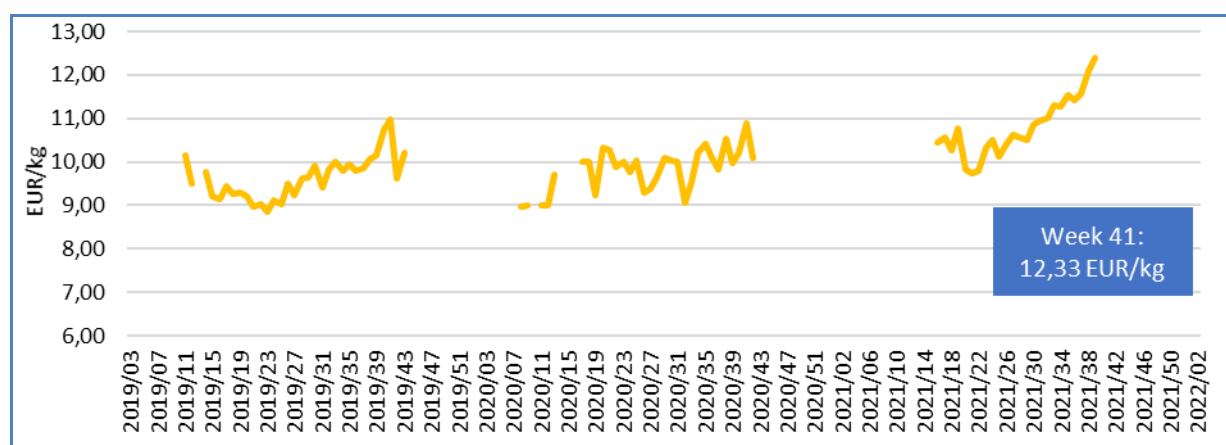
Figure 40. **IMPORT PRICE OF FRESH OR CHILLED SWORDFISH FILLETS FROM CHILE, 2019–2022**

Figure 41. **IMPORT PRICE OF PREPARED OR PRESERVED MACKEREL FILLETS FROM MOROCCO, 2019–2021**

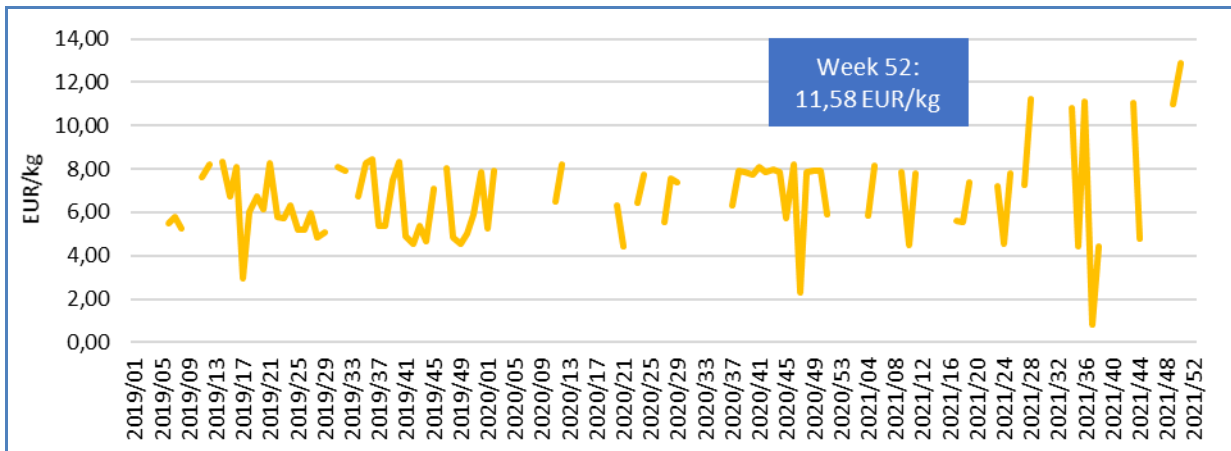
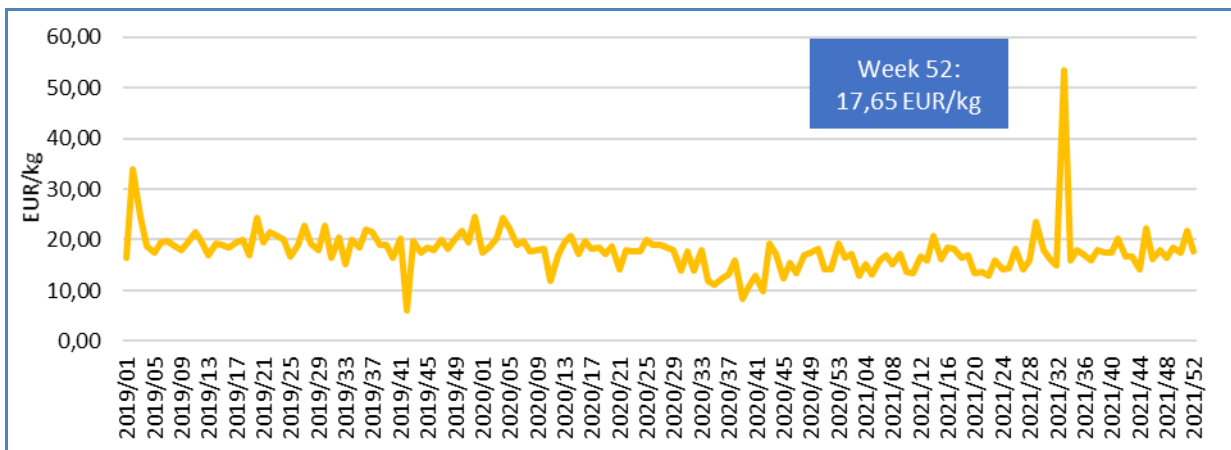


Figure 42. **IMPORT PRICE OF PREPARED OR PRESERVED EELS, WHOLE OR IN PIECES, FROM CHINA, 2019–2022**



Both price and volume of fresh or chilled swordfish fillets from Chile exhibited an upward trend in 2021. Price ranged from 9,67 to 12,39 EUR/kg. On average, the weekly supply was around 27 tonnes.

Since the beginning of the year, both price and volume of prepared or preserved mackerel fillets from Morocco demonstrated an upward trend. Volume ranged from 0,002 to 30 tonnes.

In 2021, both price and volume of prepared or preserved eels from China exhibited an upward trend. Price ranged from 12,89 to 53,50 EUR/kg, and supply from 0,6 to 70 tonnes.

## 3. Consumption

### 3.1. HOUSEHOLD CONSUMPTION IN THE EU

Data analysed in the section “Consumption” are extracted from EUMOFA, as collected from Europanel<sup>24</sup>.

In November 2021 compared with November 2020, household consumption of fresh fisheries and aquaculture products increased in both volume and value only in Denmark (+3%, and +8%, respectively). In Italy, value increased but volume decreased. In the rest of the countries analysed, consumption decreased. The increase in Denmark was due mainly to halibut (+83% in volume, +130% in value), and salmon (+2% in volume, +14% in value). In Italy, squid (-48%) and anchovy (-39%) were the main contributors to the volume decrease, whereas European seabass (+50%) contributed to the value increase. Portugal and Sweden were among the Member States registering the highest decrease in consumption. Cod contributed the most to the decrease in Sweden (-52% in volume, -42% value), whereas in Portugal, mackerel was the main cause (-49% in volume, -37% in value). Cod was among the species that contributed most heavily to the decrease in volume and value in Ireland (-24%, -35%, respectively) and France (-31% and -28%, respectively). In Poland, mackerel made the greatest contribution to the decrease in consumption volume and value (-18% and -15%, respectively). Mussel *Mytilus* spp. was the main contributor to volume and value decrease in Germany (-53% and -50%, respectively) and the Netherlands (-59% and -61%, respectively).

Table 23. NOVEMBER OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)

| Country     | Per capita consumption 2019* (live weight equivalent, LWE) kg/capita/year | November 2019 |        | November 2020 |        | October 2021 |        | November 2021 |        | Change from November 2020 to November 2021 |       |
|-------------|---------------------------------------------------------------------------|---------------|--------|---------------|--------|--------------|--------|---------------|--------|--------------------------------------------|-------|
|             |                                                                           | Volume        | Value  | Volume        | Value  | Volume       | Value  | Volume        | Value  | Volume                                     | Value |
| Denmark     | 42,56                                                                     | 921           | 15,44  | 1.041         | 16,80  | 1.085        | 17,97  | 1.073         | 18,21  | 3%                                         | 8%    |
| France      | 33,26                                                                     | 17.596        | 198,30 | 20.911        | 229,63 | 18.344       | 207,20 | 17.463        | 200,12 | 16%                                        | 13%   |
| Germany     | 13,08                                                                     | 5.618         | 73,30  | 7.059         | 96,29  | 5.405        | 75,49  | 5.688         | 77,03  | 19%                                        | 20%   |
| Hungary     | 6,28                                                                      | 333           | 1,63   | 417           | 2,54   | 409          | 2,82   | 320           | 2,09   | 23%                                        | 18%   |
| Ireland     | 25,50                                                                     | 914           | 13,19  | 1.202         | 15,41  | 1.106        | 16,55  | 925           | 14,19  | 23%                                        | 8%    |
| Italy       | 31,21                                                                     | 24.451        | 265,92 | 24.224        | 251,61 | 24.179       | 269,26 | 22.933        | 257,05 | 5%                                         | 2%    |
| Netherlands | 20,60                                                                     | 2.401         | 37,52  | 3.091         | 44,43  | 2.894        | 43,65  | 2.501         | 41,75  | 19%                                        | 6%    |
| Poland      | 13,11                                                                     | 3.942         | 25,28  | 4.152         | 26,55  | 3.792        | 25,86  | 3.799         | 26,17  | 9%                                         | 1%    |
| Portugal    | 59,91                                                                     | 5.478         | 36,16  | 6.810         | 47,45  | 5.883        | 41,45  | 5.145         | 38,37  | 24%                                        | 19%   |
| Spain       | 46,02                                                                     | 50.471        | 409,12 | 57.453        | 458,51 | 49.643       | 426,77 | 48.004        | 423,47 | 16%                                        | 8%    |
| Sweden      | 25,16                                                                     | 774           | 10,38  | 923           | 11,07  | 925          | 13,03  | 697           | 9,80   | 24%                                        | 11%   |

\*Data on per capita consumption of all fish and seafood products for all EU Member States can be found at: [https://www.eumofa.eu/documents/20178/477018/EN\\_The+EU+fish+market\\_2021.pdf/](https://www.eumofa.eu/documents/20178/477018/EN_The+EU+fish+market_2021.pdf/)

<sup>24</sup> Last update: 08.02.2022.

Over the past three years, the average household consumption of fresh fisheries and aquaculture products for November (in volume) has been below the annual average in most of the Member States analysed. The exceptions are France, Portugal, Spain, and Sweden, where it was above average. In terms of value, the November average household consumption was above the annual average only in France and Spain.

The most recent weekly consumption data (up to **week 8 of 2022**) are available on the EUMOFA website and can be accessed [here](#).

## 3.2. Miscellaneous tuna

**Habitat:** Saltwater species, found across the world's oceans.

**Production method:** Mostly caught, very small quantities farmed.

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

**Presentation:** Whole, fillets.

**Preservation:** Fresh and chilled, frozen, and canned.

### 3.2.1. Overview of household consumption in Spain

Spain is one of the EU Member States where the per capita apparent consumption<sup>25</sup> of fisheries and aquaculture products is among the highest in the EU. In 2019, this amounted to 46,02 kg and remained stable compared to 2018. This is 92% above the EU average (23,97 kg LWE).

Tuna is the most consumed species in the EU reaching 3,10 kg LWE in 2019. This was an increase of 2% compared to 2018. It is mostly caught, although 0,86% is farmed. The most consumed tuna products on the EU market are prepared and preserved. EU consumption of tuna is largely supported by imports but there is also internal production, mainly consisting of Spanish and French catches<sup>26</sup>.

Over the past three years (December 2018 – November 2021), total Spanish household consumption of miscellaneous tunas, mainly skipjack tuna, yellowfin tuna, and bigeye tuna, was 49.394 tonnes. Spanish consumers spent an average of 10,50 EUR per month on a kilogram of miscellaneous tunas.

<sup>25</sup> "Apparent consumption" is calculated using a supply balance sheet that provides an estimate of the supply of fisheries and aquaculture products available for human consumption at the 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.

<sup>26</sup> [https://eumofa.eu/documents/20178/477018/EN\\_The+EU+fish+market\\_2021.pdf/](https://eumofa.eu/documents/20178/477018/EN_The+EU+fish+market_2021.pdf/)

Figure 43. PRICES OF MISCELLANEOUS TUNA PURCHASED BY SPANISH HOUSEHOLDS

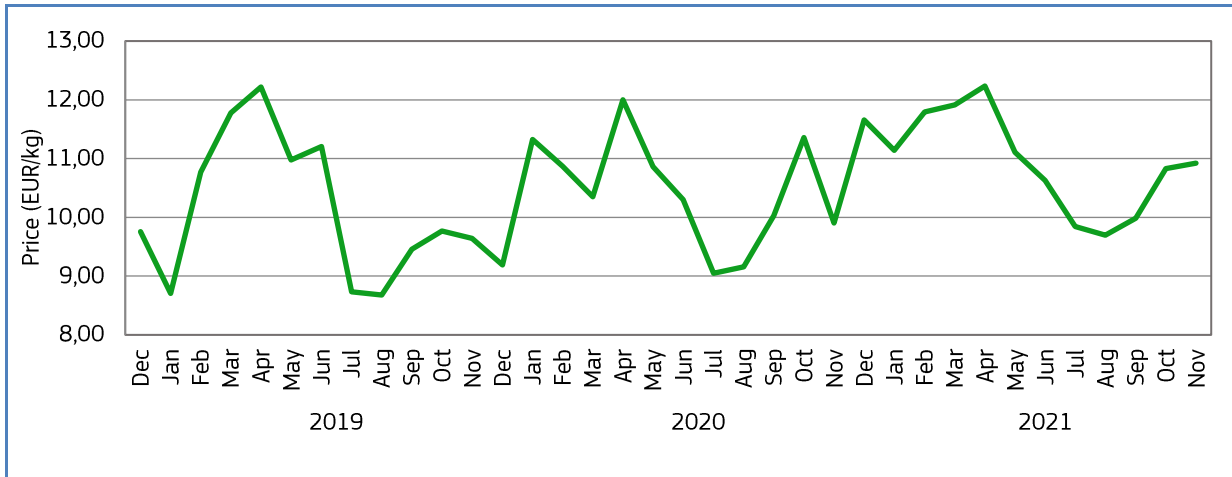
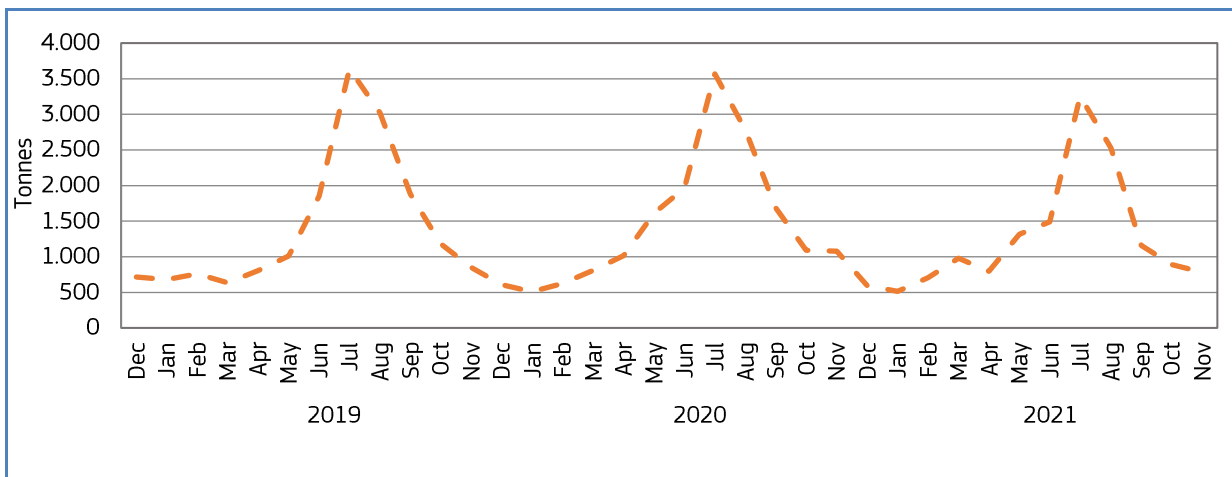


Figure 44. HOUSEHOLD PURCHASES OF MISCELLANEOUS TUNA IN SPAIN



### 3.2.2. Household consumption trends in Spain

**Long-term trend (December 2018 to November 2021):** Upward trend in both price and in volume.

**Yearly average price:** 10,26 EUR/kg (2018), 10,09 EUR/kg (2019), 10,57 EUR/kg (2020).

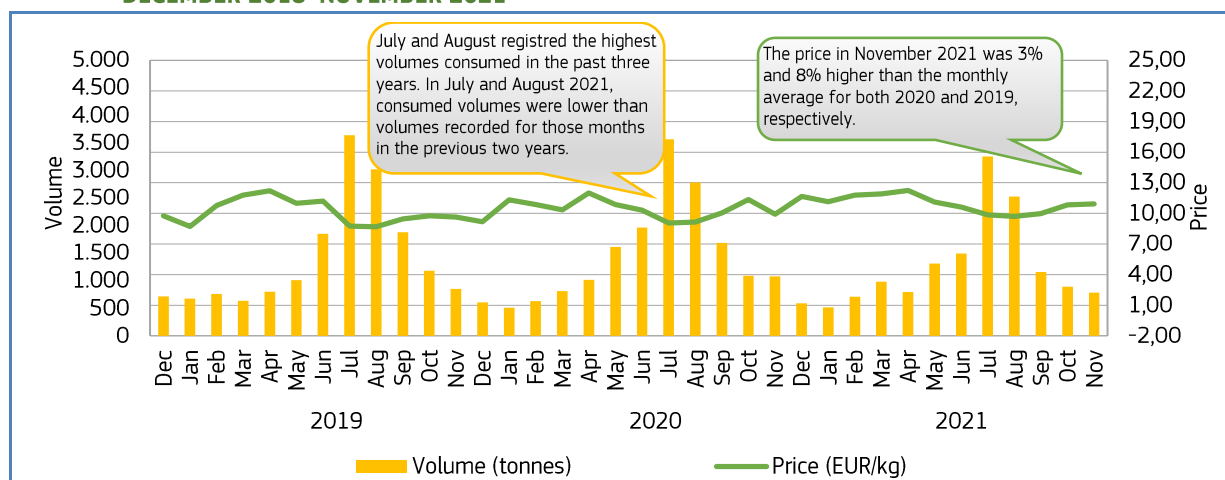
**Yearly consumption:** 16.195 tonnes (2018), 16.925 tonnes (2019), 17.342 tonnes (2020).

**Short-term trend (January to November 2021):** downward trend in price, upward trend in volume.

**Average price:** 10,92 EUR/kg.

**Consumption:** 14.414 tonnes.

Figure 45. **RETAIL PRICE AND VOLUME OF MISCELLANEOUS TUNA PURCHASED BY HOUSEHOLDS IN SPAIN, DECEMBER 2018–NOVEMBER 2021**





## 4. Case study – Fisheries and aquaculture in Tunisia

### 4.1 Introduction

Tunisia is a country located in North Africa. It is bounded by Algeria to the west and southwest, and by Libya to the southeast, while the Mediterranean Sea lies to the east and north of the country. Tunisia had a population of 11,7 million in 2020, and the majority of people live along the coast<sup>27</sup>. With 1,300 km of coastline along the Mediterranean Sea, an exclusive economic zone of 80.000 km<sup>2</sup>, and 105.200 ha of lagoons, fishing is an important source of income and employment for the country. Fishing is deeply embedded in Tunisian culture and traditions, particularly among coastal populations. However, in 2020, the value of the fisheries and aquaculture sector represented just 4% of the value of the total agriculture sector in Tunisia. The fisheries sector currently faces serious challenges due to concerns for the sustainability of fisheries resources in the Mediterranean, while aquaculture has strong potential for growth based on the intensification of marine farms with cage systems. However, spatial conflicts, environmental sustainability concerns, and social acceptance constitute future challenges for the sector's growth. Fisheries and aquaculture products are an important source of protein for a large part of the population. The average Tunisian consumes 11,1 kg of fish and seafood on an annual basis<sup>28</sup>. The processing industry is focused mainly on canned tuna and sardines, and frozen molluscs and crustaceans, which are largely exported to the EU.

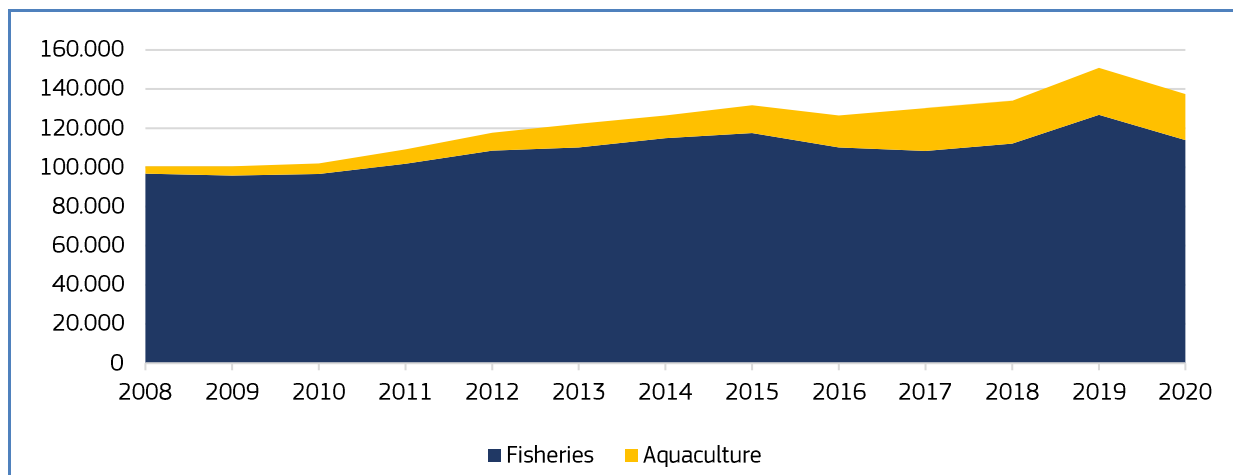


Source: [https://commons.wikimedia.org/wiki/File:Tunisia\\_Regions\\_map.png](https://commons.wikimedia.org/wiki/File:Tunisia_Regions_map.png) Commons

### 4.2 Fisheries and aquaculture production

In Tunisia, fisheries and aquaculture production combined grew from 100.578 tonnes in 2008 to 137.430 tonnes in 2020. During this period, fisheries production increased by 18%, while aquaculture production significantly increased from just under 4.000 tonnes to almost 24.000 tonnes.

Figure 46. CONTRIBUTION OF AQUACULTURE AND FISHERIES IN TOTAL PRODUCTION (volume in tonnes)



Source: Ministère de l'Agriculture. Groupement Interprofessionnel des Produits de la Pêche.

<sup>27</sup> Statistics Tunisia (*Statistiques Tunisie*). Available at: <http://www.ins.tn/statistiques/111>

<sup>28</sup> National observatory of Agriculture (*Observatoire national de l'Agriculture*). Available at: <http://www.onagri.tn/uploads/images/filieres/peche-aqua/2021/Fiche-peche-aquaculture.pdf>

The coastline is divided into three fishing zones: north, east, and south. The Gulf of Gabès in the south of the country is a particularly rich fishing area. There are 41 fishing ports with a combined fishing capacity of 150.000 tonnes/year, including ten industrial fishing ports, 23 coastal ports, and eight landing areas for artisanal fishing vessels. Two additional ports are currently under construction<sup>29</sup>.

The fishing fleet in Tunisia comprised of 14.747 fishing vessels in 2019, of which 12.993 were active. Vessels involved in coastal fishing<sup>30</sup> constitute the greatest share of the fishing fleet (92%), followed by trawlers (3%), vessels targeting sardines (3%), vessels targeting tuna (43 vessels in 2019, representing less than 1% of the fishing fleet), and other vessels (1%). More than half of the fishing vessels are not motorised<sup>31</sup>.

In terms of employment, the latest statistics show that almost 50.000 people were directly employed in the fisheries and aquaculture sector in Tunisia in 2019. A large majority were employed in the southern part of the country, where most of Tunisia's fishing activities are concentrated (in terms of production volume and active vessels). Coastal fishing employs 73% of total employment, followed by vessels targeting sardine and trawlers with 11% of employment each. 2% of total employees are involved in the aquaculture sector and 3% involved in the other fishing types<sup>32</sup>.

### Fisheries production

Total capture production has increased in recent years, reaching almost 110.000 tonnes in 2019 according to the Food and Agriculture Organization (FAO), and almost 108.000 tonnes in 2020, according to national statistics<sup>33</sup>. National statistics provide data on fisheries production by fishing type. Small pelagic fishing is the most important in terms of volume, representing 46% of the total fisheries production volume, followed by coastal fishing (31%), and demersal trawling (20%). In value terms, coastal fishing is highest, representing 37% of the total fisheries production value, followed by demersal trawling (33%). Small pelagic fishing ranks third (17%), followed by tuna fishing (11%). The most valuable species caught by the Tunisian fishing fleet are octopus, cuttlefish, tuna, and shrimps<sup>34</sup>.

Table 24. **CATCHES BY FISHING TYPE IN TUNISIA (volume in tonnes)**

| Fishing Type             | 2011   | 2012   | 2013   | 2014    | 2015    | 2016    | 2017    | 2018    | 2019    | 2020    |
|--------------------------|--------|--------|--------|---------|---------|---------|---------|---------|---------|---------|
| Small pelagic fishing    | 48.988 | 49.067 | 44.208 | 50.863  | 51.439  | 51.833  | 52.480  | 54.487  | 47.378  | 49.855  |
| Coastal fishing          | 23.578 | 22.662 | 26.430 | 24.705  | 28.577  | 27.734  | 31.812  | 32.066  | 32.347  | 33.847  |
| Demersal trawler fishing | 19.636 | 19.875 | 22.133 | 22.618  | 25.643  | 26.839  | 26.873  | 27.252  | 26.611  | 21.246  |
| Tuna fishing             | 2.679  | 2.259  | 1.937  | 1.924   | 1.313   | 1.822   | 1.364   | 1.403   | 1.562   | 2.053   |
| Mollusc bivalve fishing  | 536    | 473    | 433    | 690     | 770     | 1.102   | 1.635   | 1.386   | 1.547   | 734     |
| Pelagic trawler fishing  | 780    | 924    | 1026   | 750     | 396     | 440     | 360     | 289     | 119     | 70      |
| Total                    | 6.255  | 95.311 | 96.225 | 101.597 | 108.184 | 109.825 | 114.601 | 116.967 | 109.655 | 107.897 |

Source: Ministère de l'Agriculture. Groupement Interprofessionnel des Produits de la Pêche.

The fisheries sector is currently facing challenges due to concerns related to the sustainability of fisheries resources. In the Mediterranean Sea, 83% of the 35 assessed stocks are overexploited and a further 75% of stocks are not assessed<sup>35</sup>. In addition, the sector faces a strong threat from Illegal, Unreported and Unregulated (IUU) fishing. According to a recent study

<sup>29</sup> Fishery and Aquaculture Country profile of Tunisia. Available at: <https://www.fao.org/fishery/en/facp/222/fr>

<sup>30</sup> According to national legislation, coastal fishing corresponds to fishing activities taking place within the depth limit of 50 m in the South region and 3 miles in the North and East and using passive gear.

<sup>31</sup> Ministère de l'Agriculture. Groupement Interprofessionnel des Produits de la Pêche and Observatoire National de l'Agriculture. Available at: <http://www.onagri.nat.tn/articles?id=7>

<sup>32</sup> Ministère de l'Agriculture. Centre Technique d'Aquaculture. Available at: <https://www.ctaqua.tn/2021/04/07/la-peche-en-tunisie/>

<sup>33</sup> Ministère de l'Agriculture. Centre Technique d'Aquaculture. Available at: <https://www.ctaqua.tn/2021/04/07/la-peche-en-tunisie/>

<sup>34</sup> Ministère de l'Agriculture, des Ressources Hydrauliques et de la Pêche. Statistics available at: <http://www.agridata.tn/fr/group/production-agricole>

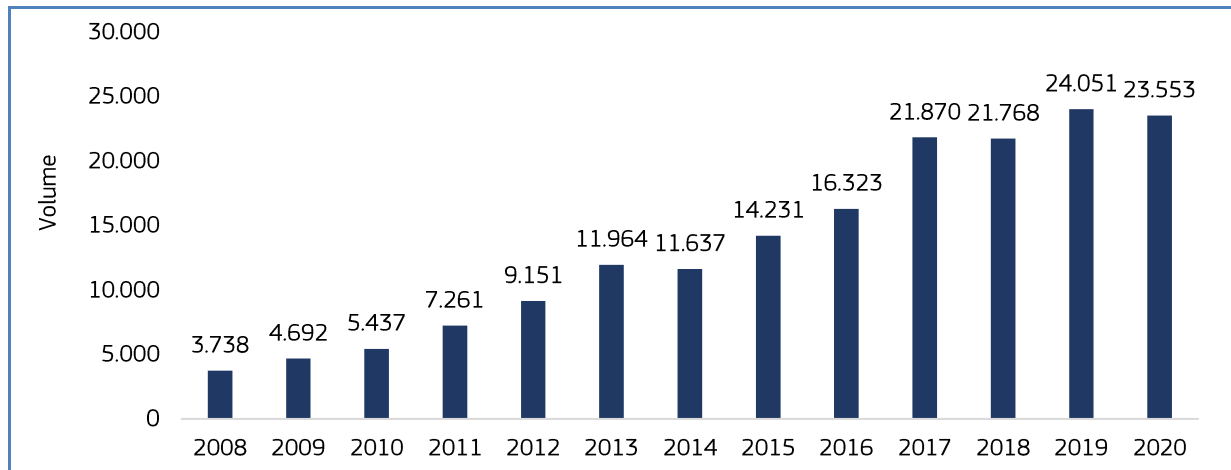
<sup>35</sup> Scientific, Technical and Economic Committee for Fisheries (STECF). Monitoring the performance of the Common Fisheries Policy (STECF-Adhoc-21-01).

carried out by the public authority responsible for fisheries in Tunisia, 4,524 cases of IUU fishing were reported in the period between 2015 and 2018<sup>36</sup>.

### Aquaculture production

Aquaculture production has grown steadily in recent years, rising from 3,738 tonnes in 2008 to 23,553 tonnes in 2020<sup>37</sup>. This growth was mainly driven by an increase in gilthead seabream (*Sparus aurata*) production, which rose from less than 2,500 tonnes to over 18,000 tonnes during the same period<sup>38</sup>.

Figure 47. **EVOLUTION OF AQUACULTURE PRODUCTION IN TUNISIA (volume in tonnes)**



Source: Ministère de l'Agriculture. Groupement Interprofessionnel des Produits de la Pêche.

The aquaculture sector in Tunisia comprises the following activities<sup>39</sup>:

- **Marine finfish production** (mainly sea bass and seabream): Production of both species represents the largest share of Tunisian aquaculture production. In 2019, together they accounted for 93% of the total aquaculture production in Tunisia (versus 70% in 2010)<sup>40</sup>. Marine finfish aquaculture is practiced in concrete facilities with a fish density of 60kg/m<sup>2</sup><sup>41</sup> or in floating cages at sea. There are three hatcheries, one semi-intensive farm, three intensive farms using tanks and raceways, and 24 farms in sea cages (recent years have been marked by the expansion of floating and submersible cages). The main share of production is concentrated on the eastern shore of the country in the vicinity of Monastir governorate.
- **Tuna fattening**<sup>42</sup>: This activity involves the fattening of Atlantic bluefin tuna (*Thunnus thynnus*) captured in the wild or imported. It first arose in 2003. Four farms currently conduct tuna fattening in Tunisia.
- **Marine shellfish production**: Production is mainly of Mediterranean mussels (*Mytilus galloprovincialis*) and Pacific oyster (*Crassostrea gigas*). There are 15 active farms, most of which are located in northern Tunisia, particularly in the lagoon of Bizerte. Shellfish production uses both breeding tables and floating lines. The sector

<sup>36</sup> Rapport de l'étude préparatoire pour le projet de construction de navires de surveillance pour la gestion des ressources halieutiques en République Tunisienne. 2020. Ministère de l'Agriculture, Direction Générale des Pêches et de l'Aquaculture. Available at: <https://docplayer.fr/189315508-Republique-tunisienne-ministere-de-l-agriculture-direction-generale-des-peches-et-de-l-aquaculture.html>

<sup>37</sup> Ministère de l'Agriculture, des Ressources Hydrauliques et de la Pêche. Statistics available at: <http://www.agridata.tn/fr/group/production-agricole>

<sup>38</sup> Ibidem.

<sup>39</sup> Centre Technique d'Aquaculture. 2019 annual report available at: <https://www.ctaqua.tn/wp-content/uploads/2020/03/RAPPORT2019.pdf>, Global Agriculture Information Network. Aquaculture Industry Small but growing. 2017. Available at: [https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Aquaculture%20Industry%20Small%20but%20Growth\\_Tunis\\_Tunisia\\_5-31-2017.pdf](https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Aquaculture%20Industry%20Small%20but%20Growth_Tunis_Tunisia_5-31-2017.pdf)

<sup>40</sup> FAO Fish Stat.

<sup>41</sup> Global Agriculture Information Network. Aquaculture Industry Small but growing. 2017.

[https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Aquaculture%20Industry%20Small%20but%20Growth\\_Tunis\\_Tunisia\\_5-31-2017.pdf](https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Aquaculture%20Industry%20Small%20but%20Growth_Tunis_Tunisia_5-31-2017.pdf)

<sup>42</sup> An article on bluefin tuna fattening industry in the EU was published in EUMOFA monthly highlights No. 9/2021, available at: <https://eumofa.eu/documents/20178/475321/MH9+2021+EN.pdf#page=42>

faces challenges with pollution, and production consistently remained below 200 tonnes/year between 2010 and 2019<sup>43</sup>.

- **Inland aquaculture production:** There are two types of inland aquaculture in Tunisia, detailed below:
  - 13 farms use dams for aquaculture production, where alevins of fish species such as thinlip grey mullet (*Liza ramada*), common carp (*Cyprinus carpio*), sander (*Stizostedion lucioperca*), and flathead grey mullet (*Mugil cephalus*) are incorporated behind dams.
  - 5 farms use thermal waters for the production of Nile Tilapia (*Oreochromis niloticus*). Nile Tilapia production was below 50 tonnes/year during the period between 2010 and 2019<sup>44</sup>.
- **Algae production:** There are four algae farms in Tunisia. Production mainly comprises Spirulina (*Arthrospira spp.*), which is a technically difficult process to master. FAO statistics show that Spirulina production increased from 35 tonnes to 140 tonnes between 2016 and 2019<sup>45</sup>.
- There are also some projects at research stage with the aim of diversifying aquaculture production. These projects concern shrimp (*Penaeus vannamei*) production in semi-intensive systems and algae (*Gracilaria*) production.

Overall, aquaculture in Tunisia is primarily focused on marine finfish production (particularly seabream), and has not yet reached its full potential. The Tunisian authorities have established national strategies for the development of aquaculture with quantified goals and targets. However, these targets (the 2020 target was approximately 29.900 tonnes) have not been achieved.

### 4.3 Processing and marketing

The fisheries and aquaculture processing industry in Tunisia generated an estimated 47.722 tonnes (net product weight) in 2019, which marked a significant increase in processing compared to 2010 (21.908 tonnes). Processing activities in Tunisia mainly involve the freezing and canning of tuna and sardines, which in 2019 constituted 76% of the total volume of processed products<sup>46</sup>.

Tunisia's fisheries and aquaculture processing industry comprises the following activities<sup>47</sup>:

- **Canning of sardine, tuna, and more recently anchovy:** There are 19 specialised canning companies in Tunisia. In 2019, 29.092 tonnes of canned tuna were produced, which represented a significant increase in comparison to 2010 (7.128 tonnes). The canning industry mainly uses imported raw products, and canned tuna largely goes to the national market. Canned sardine production almost doubled between 2010 and 2019 to reach 7.300 tonnes in 2019.
- **Freezing (cuttlefish, squid, shrimps, and octopus):** 213 enterprises specialise in the freezing of fisheries and aquaculture products. In 2019, these businesses produced 4.998 tonnes of frozen cuttlefish and squid, 3.438 tonnes of frozen shrimps, and 2.894 tonnes of frozen octopus. Frozen crustaceans and molluscs are mainly exported to European countries (predominantly Italy and Spain). More recently, with the development of blue crab fisheries, these companies have started to freeze and export crabs for export to Asian markets.
- **Salting:** The process of salting is mainly used for local, traditional products such as dried octopus, salted and dried sardine and sardinella, and salted anchovies.

<sup>43</sup> FAO FishStat.

<sup>44</sup> Ibidem.

<sup>45</sup> Ibidem.

<sup>46</sup> Ibidem.

<sup>47</sup> Ministère de l'Agriculture. Groupement Interprofessionnel des Produits de la Pêche.

Table 25. **PRODUCTION OF PROCESSED FISHERIES AND AQUACULTURE PRODUCTS IN TUNISIA**  
(volume of net product weight in tonnes)

| Products                                                  | 2010   | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019   |
|-----------------------------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Tunas, skipjack, and Atlantic bonito (canned)             | 7.128  | 8.242  | 14.165 | 10.937 | 12.459 | 13.387 | 16.813 | 23.062 | 28.190 | 29.092 |
| Sardines, sardinella, and brisling or sprats (canned)     | 3.662  | 7.114  | 12.282 | 9.174  | 9.922  | 10.270 | 7.800  | 5.290  | 7.390  | 7.300  |
| Cuttlefish and squid (frozen)                             | 5.523  | 5.883  | 4.400  | 6.000  | 8.203  | 6.240  | 3.900  | 3.600  | 6.000  | 4.998  |
| Other shrimps and prawns, with or without shells (frozen) | 2.909  | 3.306  | 3.851  | 4.500  | 5.371  | 4.758  | 4.120  | 3.500  | 2.900  | 3.438  |
| Octopus (frozen)                                          | 2.686  | 5.974  | 4.100  | 3.500  | 8.334  | 5.802  | 2.980  | 2.860  | 3.377  | 2.894  |
| Other fish, salted or unsalted but not smoked (dried)     | -      | -      | -      | -      | -      | -      | -      | 2.000  | -      | -      |
| Total                                                     | 21.908 | 30.519 | 38.798 | 34.111 | 44.289 | 40.457 | 35.613 | 40.312 | 47.857 | 47.722 |

Source: FAO Fish STAT.

#### 4.4 Exports and imports

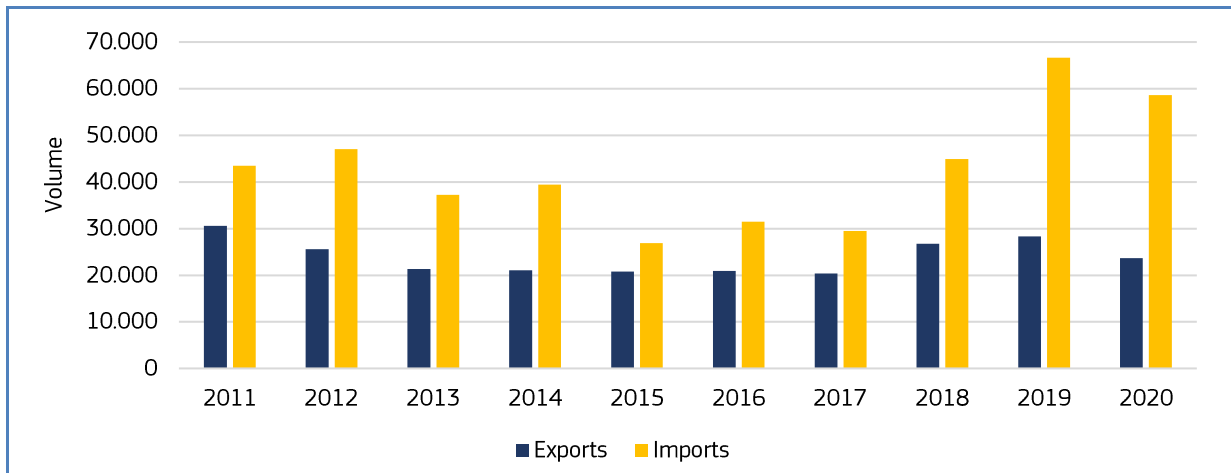
Between 2011 and 2020, Tunisian exports of fisheries and aquaculture products decreased by 23% to hit 23.668 tonnes in 2020. Imports increased by 35% from circa 43.500 tonnes to almost 59.000 tonnes over the same period, due to an increase in demand for fisheries and aquaculture products<sup>48</sup>. The decrease in trade in 2020 (-16% for exports and -12% for imports) could be explained by the boarder shutdowns in March 2020 related to the COVID-19 crisis outbreak.

The EU is the main market for Tunisian exports of fisheries and aquaculture products (the EU accounted for 50% of the Tunisian exports of fisheries and aquaculture products in 2020). This can be explained by the geographical proximity of Italy and Spain, the trade tariff advantages obtained from the commercial agreement between Tunisia and the EU<sup>49</sup>, and the solid and historic relationships between Tunisian and European operators (i.e. Italian and Spanish operators). Recently, markets in the Middle East have become important export destinations for farmed fish (sea bass and seabream) boasting good prices, despite the higher costs of cargo transport.

<sup>48</sup> Ministère de l'Agriculture, des Ressources Hydrauliques et de la Pêche. Statistics available at: <http://www.agridata.tn/fr/group/production-agricole>

<sup>49</sup> <https://ec.europa.eu/trade/policy/countries-and-regions/countries/tunisia/#:~:text=The%20EU%20and%20Tunisia%20have%20concluded%20an%20Association%20Agreement%2C%20which,free%20of%20any%20trade%20tariffs.>

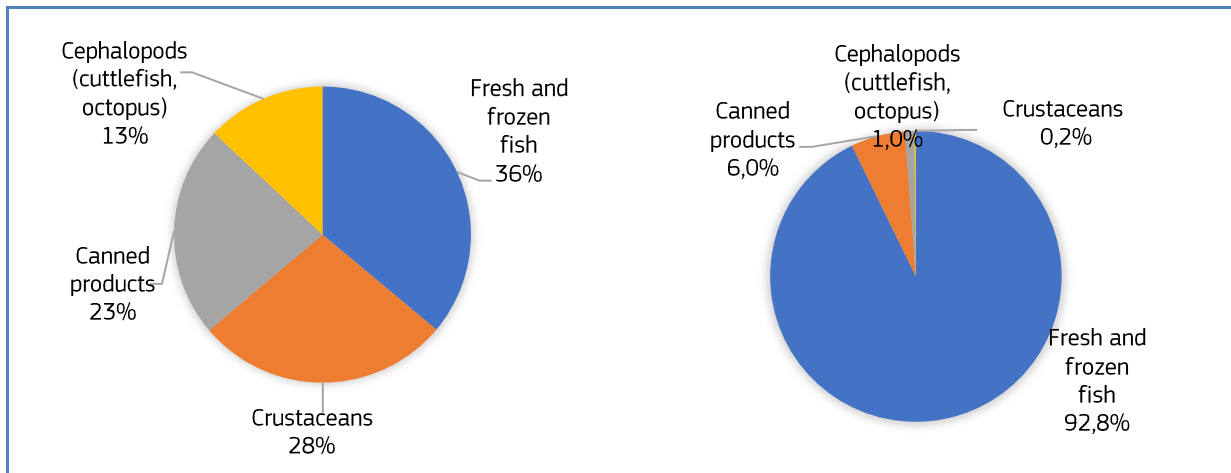
Figure 48. **TUNISIAN IMPORTS AND EXPORTS OF FISHERIES AND AQUACULTURE PRODUCTS BETWEEN 2011 AND 2020 (volume in net product weight)**



Source: Ministère de l'Agriculture. Groupement Interprofessionnel des Produits de la Pêche.

Foreign trade of fisheries and aquaculture products mainly comprise fresh and frozen fish (93% of imports and 36% of exports from Tunisia in volume terms in 2020). Crustaceans accounted for 28% of export volume, followed by canned products (23%), and cephalopods such as cuttlefish and octopus (13%).

Figure 49. **BREAKDOWN OF TUNISIAN EXPORTS (left) AND IMPORTS (right) BY PRODUCT CATEGORY IN VOLUME TERMS IN 2020**



Source: Ministère de l'Agriculture. Groupement Interprofessionnel des Produits de la Pêche.

### Focus on trade flows with the EU

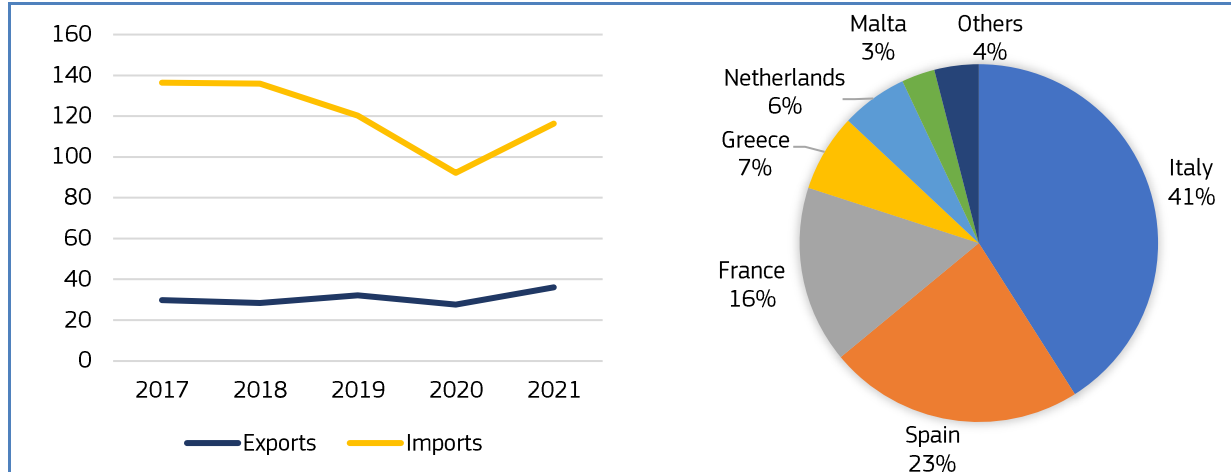
In 2021, the fisheries and aquaculture products imported by the EU-27 countries from Tunisia amounted to a volume of 12.746 tonnes and a value of EUR 116 million. The EU trade balance with Tunisia for fisheries and aquaculture products showed a deficit, amounting to about EUR 80 million in 2021. During the last five years (2017-2021), trade between the EU and Tunisia has been characterised by an overall increase in EU exports value by 21%, and an overall decrease of EU imports value by -15%. Imports in 2020 were particularly low as a result of the COVID-19 pandemic.

The greatest shares of the imports were from Italy and Spain. In 2021, together they accounted for 89% of the volume of imports from Tunisia to the EU-27 and 91% of the imports in terms of value. As for exports, with EUR 14,69 million, Italy



was responsible for almost half of EU exports to Tunisia in terms of value, followed by Spain (EUR 8,47 million), and France (EUR 5,83 million).

Figure 50. **EU TRADE OF FISHERIES AND AQUACULTURE PRODUCTS WITH TUNISIA (value in million EUR) (LEFT) AND MAIN EU EXPORTING MEMBER STATES TO TUNISIA IN VALUE IN 2021 (RIGHT)**



Source: EUMOFA based on EUROSTAT-COMEXT.

Cuttlefish was the species imported in the greatest volume to the EU from Tunisia. It represented 18% of the total volume of imports and 14% of the total value of imports in 2021, which placed it third in value terms. Italy alone accounted for circa 96% of EU cuttlefish imports, in 2021 importing 2.209 tonnes at a value of EUR 15,7 million.

Taken together, shrimp species constituted the greatest share of EU imports from Tunisia. In 2020, imports of miscellaneous shrimps, deep-water rose shrimps, and warm water shrimps constituted almost a third of EU imports. These were almost exclusively imported by Spain (60% of the EU's total volume of shrimp imports) and Italy (almost 40%).

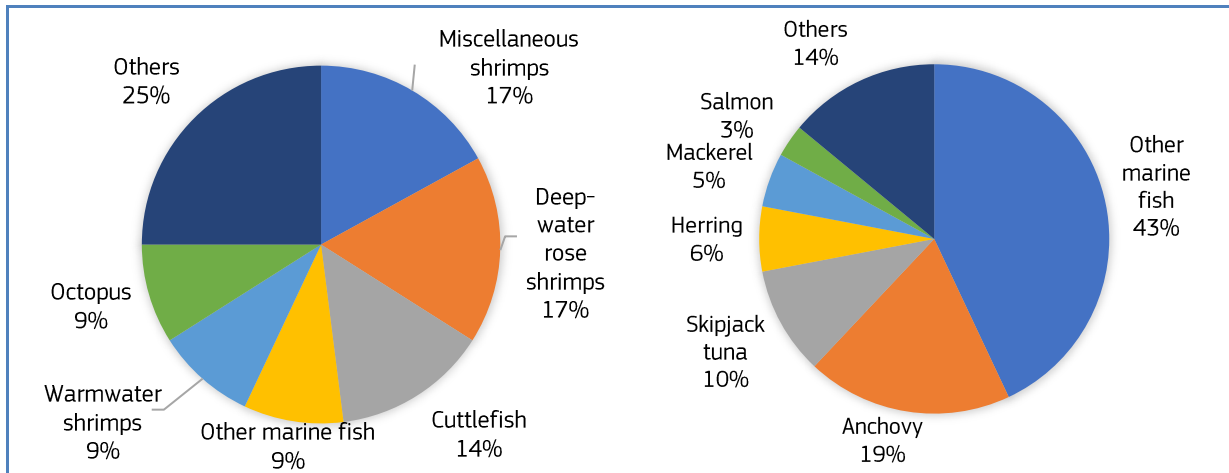
Octopus was the fourth most imported species in volume terms and the sixth most imported species in value terms. Italy imported the greatest share of EU imports of octopus, with 93% of total EU imports by volume and 84% of EU imports by value.

Exports from the EU to Tunisia comprise mainly finfish:

- The product category 'other marine fish'<sup>50</sup> was the main category of fisheries and aquaculture species that was exported to Tunisia in value terms (43% of the total imports' value in 2021).
- This was followed by anchovy (19%) – Exported by Spain in frozen form and by Italy in salted form.
- This was followed by skipjack tuna (10%) – Exported from Spain and France in frozen form to be used by the canning industry.
- This was followed by herring (6%) – Almost all exports were received in frozen form by the Netherlands.
- This was followed by mackerel (5%) – Exported in frozen form from Spain, Portugal, and Malta.
- This was finally followed by salmon (3%) – Exported mainly fresh from Italy.

<sup>50</sup> This category includes live fish, and comprises mainly fingerlings of sea bass and seabream.

Figure 51. **MAIN COMMERCIAL SPECIES IMPORTED FROM TUNISIA TO THE EU (left) AND EXPORTED TO TUNISIA (right) IN VALUE IN 2021**



Source: EUMOFA based on EUROSTAT-COMEXT.

## 4.5 Consumption

National statistics provide data on the apparent market demand for fisheries and aquaculture products in Tunisia. These statistics show an overall increase in the market rate, except for 2020, which was characterised by a decrease in the apparent rate as a result of the COVID-19 pandemic. In 2019, the apparent market rate of fisheries and aquaculture products was estimated at 190.000 tonnes (a 48% increase in rates in comparison to 2006).

Per capita apparent consumption of fisheries and aquaculture products in Tunisia was estimated at less than 11,1 kg/year in 2020<sup>51</sup>. The national average hides a great disparity between coastal and inland regions, with the latter tending to record consumption of seafood products of less than 1 kg/capita/year.

Tunisian consumers prefer marine fish. Freshwater fish caught in lakes and dams are not appreciated by consumers and are almost exclusively consumed by populations living near reservoirs.

<sup>51</sup> National observatory of Agriculture (*Observatoire national de l'Agriculture*). Available at: <http://www.onagri.tn/uploads/images/filieres/peche-aqua/2021/Fiche-peche-aquaculture.pdf>



## 5. Case study – Swordfish

### 5.1 Introduction

Swordfish (*Xiphias gladius*), also known as broadbill, is a large oceanic fish of high commercial value. Like all billfish<sup>52</sup>, swordfish have a large ‘sword’ (or rostrum) which makes up a third of their total length. Swordfish are highly migratory species and are found in all oceans. They are apex predators, feeding on a wide variety of smaller fish, crustaceans, and cephalopods. The females are highly fecund, releasing millions of eggs at a time. It is difficult to determine their age using otoliths<sup>53</sup> since they are very small and fish scales are missing in adults; however, year rings have been successfully counted on cross sections of the fin rays<sup>54</sup>. Swordfish can reach at least 25 years of age, and females appear to grow faster and have a longer lifespan than males. From nuclear and mitochondrial DNA analyses, four genetically separated breeding units of swordfish have been identified: the Mediterranean, north-western Atlantic, tropical to South Atlantic, and the Indo-Pacific. However, as is the case with most migratory species, the precise boundaries and amount of interbreeding between stocks is poorly understood. Pelagic longlines are the most common tools used in catching swordfish; however, smaller harvests are taken using drifting gillnets, driftnets, and harpoons. Swordfish is highly valued as game fish by sports fishermen (big game fishing); however, the catch volumes for this are minimal<sup>56</sup>.



Source: Shutterstock, Climber 1959.

### 5.2 Management of the swordfish

There are three major international organisations concerned with the study and management of tuna and tuna-like species (which include swordfish). The International Commission for the Conservation of Atlantic Tunas (ICCAT) has the mandate to manage swordfish and other large pelagic species in the Mediterranean and Atlantic Ocean up to Cape Agulhas (20° E). The Inter-American Tropical Tuna Commission (IATTC) studies and makes recommendations on the management of tuna and other fish caught by tuna vessels within the eastern tropical Pacific. The Indian Ocean Tuna Commission (IOTC) was created to contribute to the management of tuna and other migratory fish species in the Indian Ocean, east of Cape Agulhas. The General Fisheries Council of the Mediterranean (GFCM) and the ICCAT Working Group on Stocks of Large Pelagic Fishes in the Mediterranean Sea, the so-called “GFCM-ICCAT Working Group”, make management recommendations and promote data exchange between nations. However, they do not enforce regulations.

In 2021, the TACs (Total allowable catches) assigned by ICCAT for EU vessels fishing for swordfish were 13.200 tonnes in the Atlantic Ocean zone north of 5°N, 14.000 tonnes in the Atlantic Ocean zone south of 5°N, and 9.017 tonnes in the Mediterranean Sea<sup>57</sup>. The majority of the quota in the first two zones was assigned to Spain, while in the Mediterranean, the most was assigned to Italy. The ICCAT decided to maintain the current TAC for swordfish for EU vessels<sup>58</sup> in 2022.

The EU is responsible for about 70% of the total catch of Mediterranean swordfish, with Greece, Spain, and Italy reporting the majority share. A further 10% of the catch is shared between France, Croatia, Cyprus, and Malta. Other countries, notably

<sup>52</sup> The collective name given to fish that have a sword-like extension to their upper jaw. This includes swordfish, marlins, sailfish, and spearfish.

<sup>53</sup> The otolith (ear stone or ear bone) is the most commonly used structure for determining the age of fish. Otoliths are calcium carbonate structures found inside the heads of bony fish.

<sup>54</sup> Fin rays form the skeleton of the fins of fishes, characteristic for bony fish.

<sup>55</sup> Muus, B.J. and J.G. Nielsen, 1999. Sea fish. Scandinavian Fishing Year Book, Hedehusene, Denmark. 340 p.

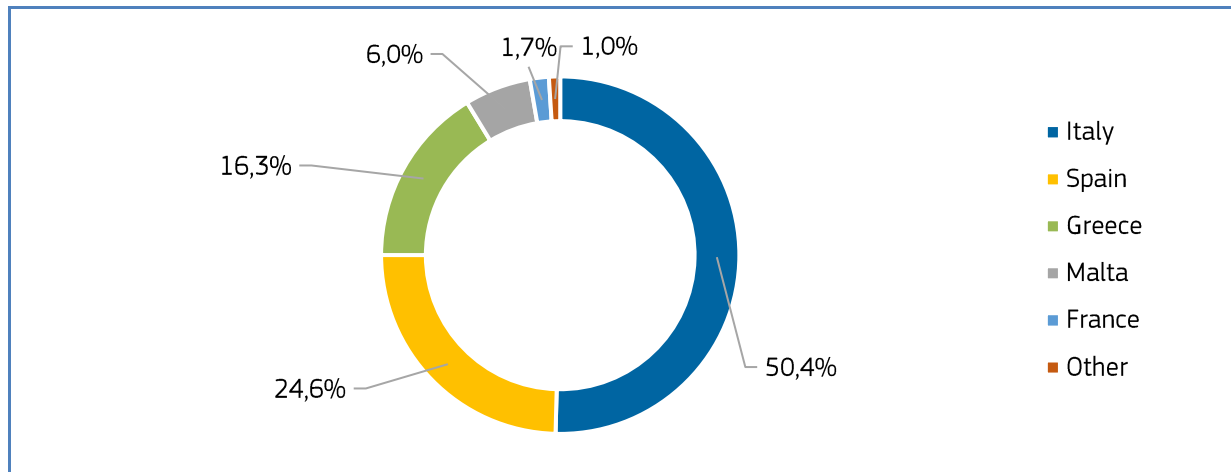
<sup>56</sup> [https://www.iattc.org/Meetings/Meetings2021/IATTC-98a/Docs/\\_English/IATTC-98a-01\\_The%20fishery%20and%20status%20of%20the%20stocks%202020.pdf](https://www.iattc.org/Meetings/Meetings2021/IATTC-98a/Docs/_English/IATTC-98a-01_The%20fishery%20and%20status%20of%20the%20stocks%202020.pdf)

<sup>57</sup> [https://ec.europa.eu/oceans-and-fisheries/system/files/2021-12/2021-12-08-non-paper-updates-2022-fishing-opportunities-regulation\\_en.pdf](https://ec.europa.eu/oceans-and-fisheries/system/files/2021-12/2021-12-08-non-paper-updates-2022-fishing-opportunities-regulation_en.pdf)

<sup>58</sup> [https://ec.europa.eu/oceans-and-fisheries/system/files/2021-12/2021-12-08-non-paper-updates-2022-fishing-opportunities-regulation\\_en.pdf](https://ec.europa.eu/oceans-and-fisheries/system/files/2021-12/2021-12-08-non-paper-updates-2022-fishing-opportunities-regulation_en.pdf)

Algeria, Morocco, Tunisia, and Turkey, also exploit the stock in the Mediterranean. Since 2017, the multiannual recovery plan for Mediterranean swordfish is in effect and will continue until 2031. The aim is to achieve a maximum sustainable yield of Mediterranean swordfish by 2031, with at least a 60% probability of achieving that target<sup>59</sup>. The preventive measures of the recovery plan include a closure period for fishing activities (from 1 January to 31 March each year) and longline vessels targeting Mediterranean albacore tuna (*Thunnus alalunga*) from 1 October to 30 November of each year. The measures also stipulate a minimum landing size of 100 cm lower jaw to fork length (LJFL), or fish weighing less than 11,4 kg of live weight, or 10,2 kg of gilled and gutted weight, as well as a fixed, maximum hook number of 2500.

Figure 52. **SHARES OF TACS FOR THE EU VESSELS TARGETING SWORDFISH IN 2021 (zone: Mediterranean Sea)**



Source: European Commission.

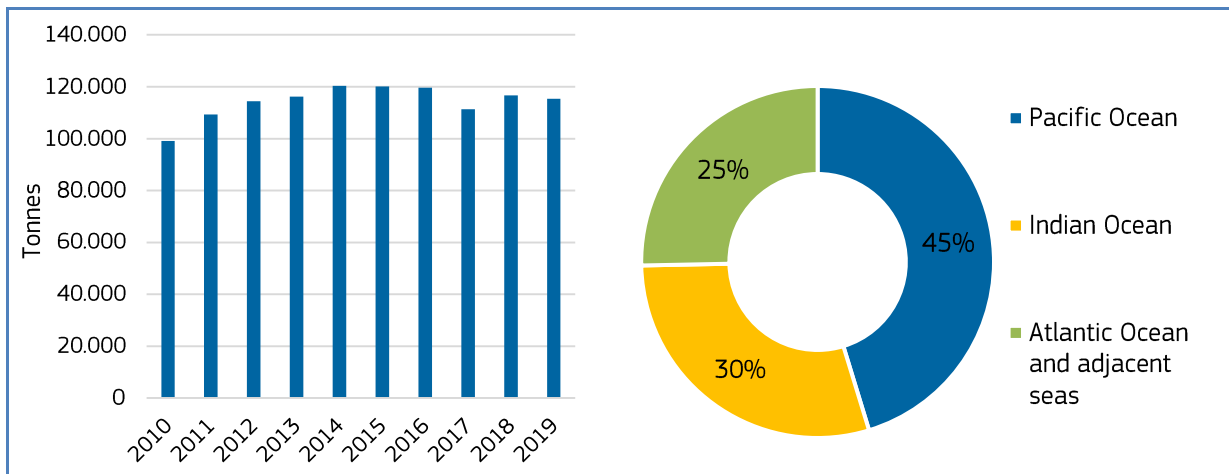
### 5.3 Fisheries

In 2019, the total world catch of swordfish was recorded as 115.345 tonnes, a decrease of 1.293 tonnes (-1%) compared to the previous year. Since 2011, catches have varied between 100.000 and 121.000 tonnes.

The majority of swordfish catches are from the Pacific Ocean (45%), followed by the Indian Ocean (30%) and the Atlantic Ocean and its adjacent seas (25%). The Southeast Pacific is the region of the Pacific with the highest catch volumes, followed by the Western Indian Ocean. However, in 2019, the highest catch volumes were recorded in the Western Indian Ocean (26.347 tonnes, 3.318 tonnes more than in the Southeast Pacific). When it comes to the Atlantic Ocean and its adjacent seas, the highest volumes of swordfish catches were recorded in the Mediterranean and Black Seas in 2019.

<sup>59</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32019R1154>

Figure 53. **CATCH OF SWORDFISH (volumes in tonnes) (left) AND SHARE OF DISTRIBUTION OF CATCHES IN THE WORLD'S OCEANS (%) (right, 2019)**



Source: FAO.

By country, the highest catch volumes of swordfish are recorded by Spain, Taiwan, Japan, and Sri Lanka in 2019. The same year, Spain recorded a catch of 23.355 tonnes, 38 tonnes higher than the year before. Spain is the only major fishing country catching swordfish in all oceans. In 2019, Sri Lanka took second place over Taiwan with a record high catch of 12.096 tonnes, an increase of 39% compared to the previous year. Taiwan reported the lowest catch volumes of swordfish in the last five years at only 10.523 tonnes (11% lower than in 2018), dropping to third place in 2019.

Other EU-27 countries recorded 7.137 tonnes of swordfish catch in 2019, which was an increase of 13% from the previous year.

Table 26. **TOTAL CATCH VOLUMES OF SWORDFISH (in tonnes) BY COUNTRY**

|              | 2010          | 2011           | 2012           | 2013           | 2014           | 2015           | 2016           | 2017           | 2018           | 2019           |
|--------------|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| EU-Spain     | 18.975        | 29.177         | 25.224         | 28.346         | 30.090         | 26.260         | 25.736         | 22.676         | 23.307         | 23.355         |
| Sri Lanka    | 3.161         | 3.675          | 3.845          | 5.537          | 4.365          | 5.102          | 4.378          | 9.200          | 8.700          | 12.096         |
| Taiwan       | 9.730         | 11.027         | 14.400         | 12.944         | 12.922         | 15.067         | 14.332         | 12.892         | 11.862         | 10.523         |
| Japan        | 12.335        | 11.406         | 10.539         | 10.162         | 10.837         | 11.073         | 10.949         | 10.547         | 9.472          | 7.979          |
| EU27-Other   | 10.667        | 9.781          | 8.685          | 8.093          | 8.667          | 9.857          | 9.465          | 8.809          | 6.331          | 7.137          |
| Ecuador      | 490           | 904            | 2.138          | 1.715          | 1.959          | 2.125          | 3.475          | 3.288          | 7.684          | 6.417          |
| China        | 2.843         | 2.726          | 3.297          | 3.416          | 3.915          | 5.466          | 4.262          | 4.930          | 6.956          | 6.310          |
| Chile        | 4.363         | 4.949          | 6.339          | 4.852          | 5.799          | 6.029          | 6.928          | 5.510          | 4.738          | 6.131          |
| Other        | 36.601        | 35.665         | 39.927         | 41.112         | 41.801         | 39.086         | 40.081         | 33.432         | 37.588         | 35.396         |
| <b>Total</b> | <b>99.165</b> | <b>109.310</b> | <b>114.394</b> | <b>116.177</b> | <b>120.355</b> | <b>120.065</b> | <b>119.606</b> | <b>111.284</b> | <b>116.638</b> | <b>115.345</b> |

\*Totals may not correspond with the sum of the separate figures due to rounding.

\*EU27-Other includes all the MS from 2010-2019 except the United Kingdom and Spain

Source: FAO

Swordfish catch and landing volumes differ considerably between countries.<sup>60</sup>For example, Spain and Portugal have most of the TACs allocated in the Atlantic Ocean zones, while Italy dominates in the Mediterranean Sea, followed by Spain and Greece. The decrease in the total landing volumes from 2017 onwards can be partly explained by the implementation of the multiannual recovery plan for the Mediterranean swordfish that has been in force as of the same year.

<sup>60</sup> [https://ec.europa.eu/eurostat/cache/metadata/Annexes/fish\\_ld\\_esms\\_an3.pdf](https://ec.europa.eu/eurostat/cache/metadata/Annexes/fish_ld_esms_an3.pdf)

Table 27. **EU LANDINGS OF SWORDFISH (volumes in tonnes and values in EUR 1.000)**

|              | 2015          |                | 2016          |                | 2017          |                | 2018          |                | 2019          |                |
|--------------|---------------|----------------|---------------|----------------|---------------|----------------|---------------|----------------|---------------|----------------|
|              | Volume        | Value          | Volume        | Value          | Volume        | Value          | Volume        | Value          | Volume        | Value          |
| Spain        | 21.642        | 128.221        | 23.585        | 137.146        | 19.077        | 109.687        | 18.142        | 114.668        | 18.859        | 111.634        |
| Italy        | 4.273         | 39.433         | 3.946         | 36.580         | 2.987         | 29.471         | 1.779         | 17.749         | 2.475         | 24.092         |
| Portugal     | 736           | 4.031          | 725           | 4.020          | 675           | 4.572          | 725           | 5.205          | 1.094         | 6.382          |
| France       | 848           | 5.193          | 921           | 8.423          | 664           | 5.935          | 730           | 6.538          | 850           | 7.661          |
| Greece       | 728           | 6.632          | 561           | 4.856          | 461           | 4.289          | 369           | 3.583          | 651           | 5.867          |
| Malta        | 489           | 3.078          | 410           | 2.542          | 361           | 2.266          | 308           | 2.757          | 407           | 3.371          |
| Croatia      | 10            | 79             | 25            | 193            | 20            | 173            | 28            | 283            | 33            | 295            |
| Cyprus       | 46            | 398            | 43            | 346            | 45            | 358            | 36            | 244            | 17            | 120            |
| Ireland      | 16            | 98             | 9             | 59             | 0,2           | 0,3            |               |                |               |                |
| <b>Total</b> | <b>28.787</b> | <b>187.161</b> | <b>30.224</b> | <b>194.165</b> | <b>24.290</b> | <b>156.752</b> | <b>22.117</b> | <b>151.026</b> | <b>24.386</b> | <b>159.424</b> |

\*Totals may not correspond with the sum of the separate figures due to rounding.

Source: EUMOFA elaboration of EUROSTAT

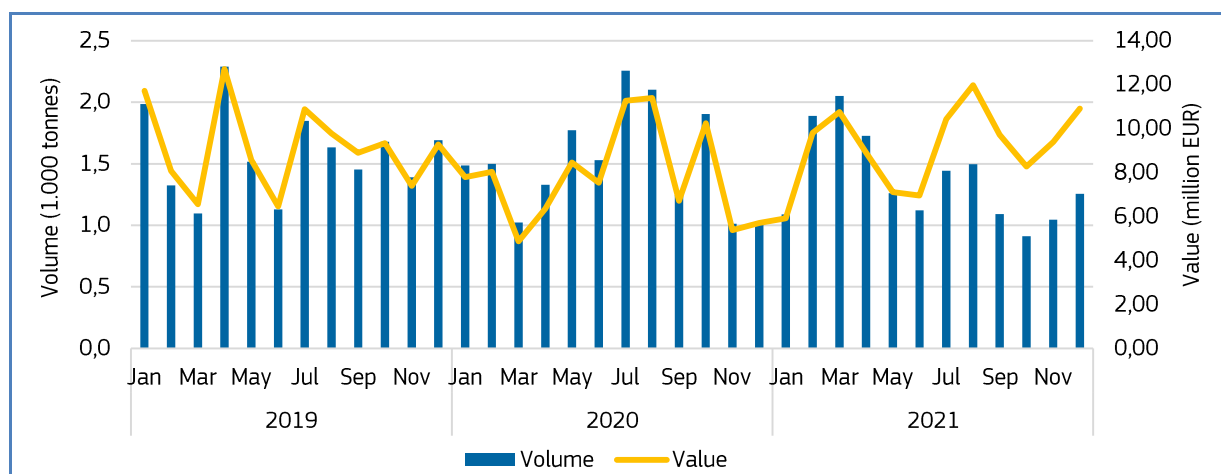
## 5.4 First sales and wholesale prices

### First Sales

From 2019 to 2021, the first sales data were reported by 6 EU MS: Spain, Italy, Portugal, Greece, France, and Cyprus. Spain and Italy reported the highest volumes and values (more than 90% of both). Total volumes and values in 2021 from all 6 EU MS were 19,2 thousand tonnes and 133 million EUR.

In 2021, first-sales volumes reported by Spain decreased by 10% while values increased by 18% from year before. Compared to 2019, first-sales volumes were 14% lower in 2021, while values were higher by 0,5%. The Spanish fishing fleet targets both North Atlantic and Mediterranean swordfish stocks. The closure period for the latter could explain the decreases in first-sales volumes for the last three years. Vigo, La Guardia and Burela are the fishing ports with the highest registered first-sales values from January to December 2021 in Spain.

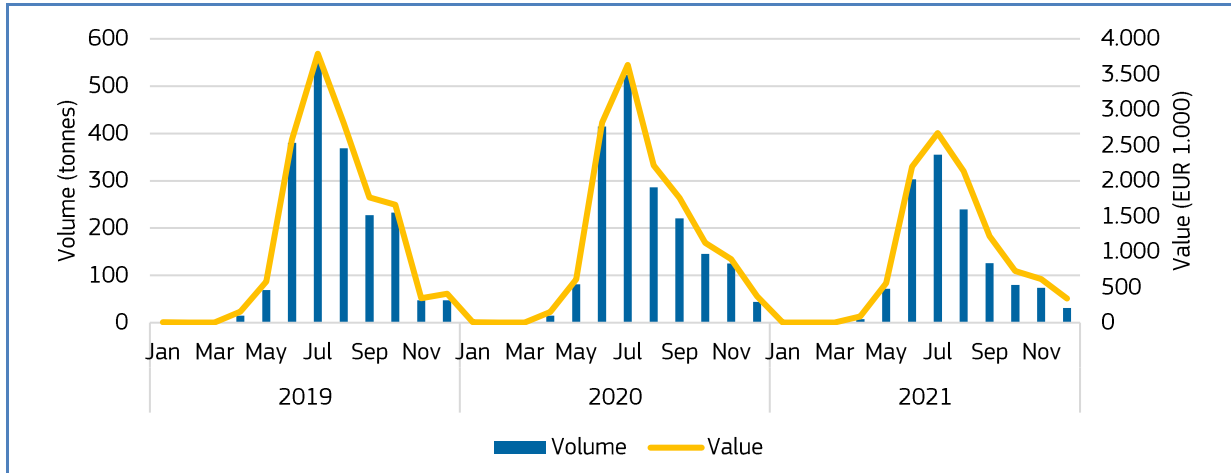
Figure 54. **FIRST SALES IN SPAIN**



Source: EUMOFA.

Italy, which had the highest EU quota for Mediterranean swordfish first sales in 2021, saw a decrease of 31% in volume and 22% in value relative to 2020. Compared to 2019, first-sales volumes and values were lower by 34% and 25% respectively. First sales in Italy are seasonal and there are no sales during the period between January and March due to fishery closures. Sant'Antioco, Porticello and Messina are the fishing ports with highest registered first-sales value in Italy from January to December 2021.

Figure 55. **FIRST SALES IN ITALY**

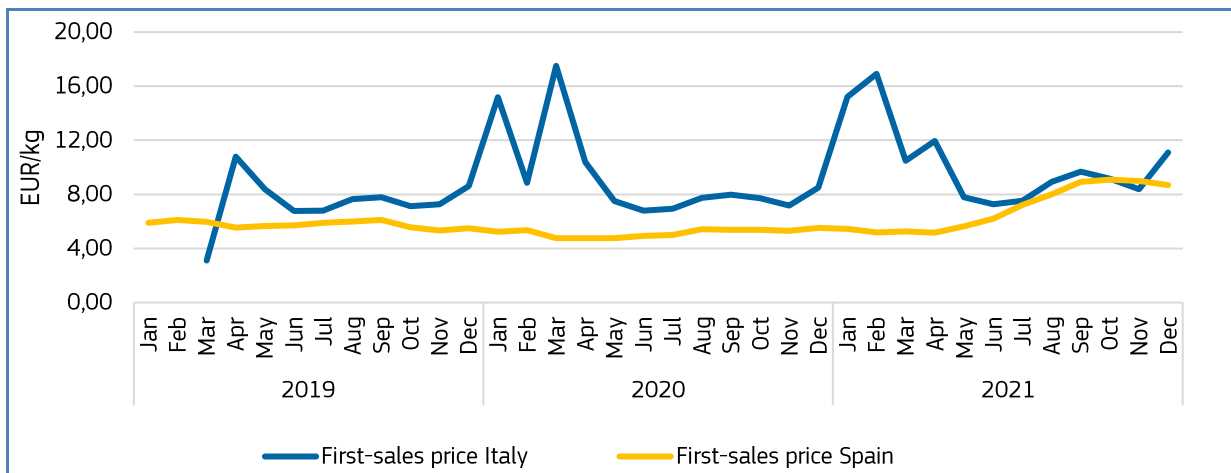


Source: EUMOFA.

From 2019 to 2021, the highest average price of swordfish was recorded in Italy (9,25 EUR/kg), 35% higher than in Spain (5,97 EUR/kg). In Italy, average first-sales prices have shown a positive trend from 2019 to 2021, increasing from 7,92 EUR/kg to 8,19 EUR/kg respectively. Peaks in prices are noticeable in the period from January to March when there is no supply due to fishery closure.

In Spain, average first-sales prices fell from 5,77 EUR/kg in 2019 to 5,72 EUR/kg in 2020. Average prices in 2021 were approximately 5,66 EUR/kg.

Figure 56. **FIRST SALES IN ITALY AND SPAIN**



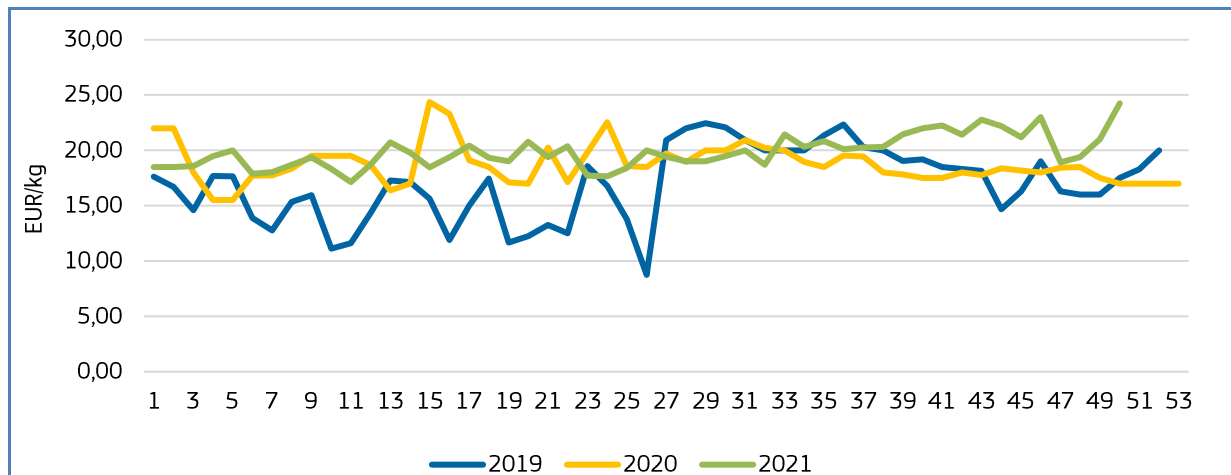
Source: EUMOFA.

## Wholesale prices

Generally, fresh swordfish is sold at higher wholesale prices than frozen. In 2019, the average yearly wholesale price of fresh swordfish was 16,9 EUR/kg, which is 8,00 EUR more than the average wholesale price for the frozen swordfish in the same year. The average wholesale prices for fresh swordfish were 18,7 EUR/kg and 19,9 EUR/kg, and for frozen, 8,2 EUR/kg and 10,1 EUR/kg, in 2020 and 2021 respectively.

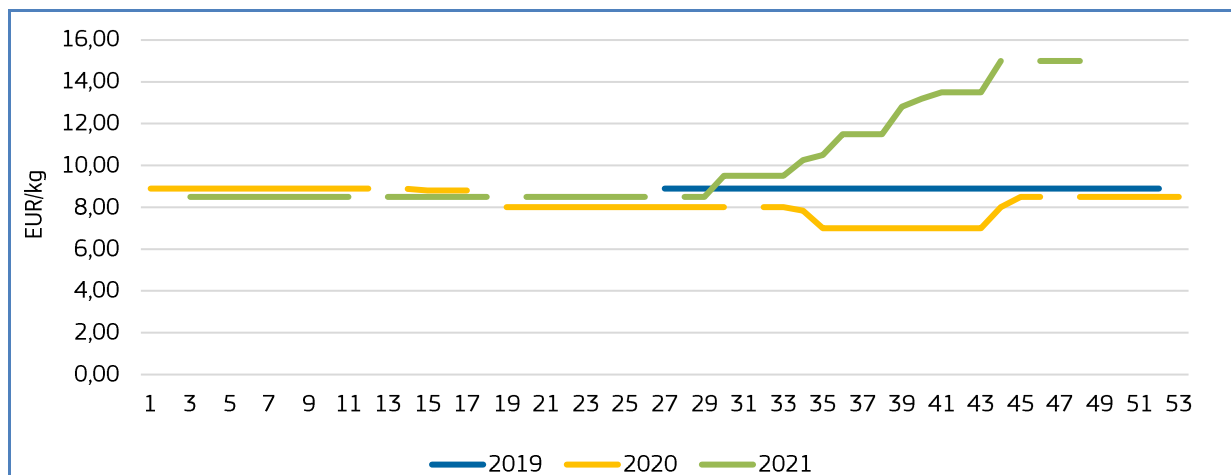
The average wholesale price of fresh swordfish increased in the second half of 2019 and remained quite stable in 2020 and 2021. There was a peak in price, reaching almost 25,00 EUR/kg in weeks 15 and 16 of 2020, following the initial outbreak of the global COVID-19 pandemic; however, it stabilised soon after. There has been a positive trend in wholesale prices for fresh swordfish in the last quarter of 2021, as well as for frozen swordfish in the second half of 2021.

Figure 57. **AVERAGE PRICE OF FRESH SWORDFISH ON THE MERCAMADRID WHOLESALE MARKET**



Source: Mercamadrid.

Figure 58. **AVERAGE PRICE OF FROZEN SWORDFISH ON THE MERCAMADRID WHOLESALE MARKET**



Source: Mercamadrid.

## 5.5 EU TRADE<sup>61</sup>

In 2021, the EU imported 17.636 tonnes swordfish at a value of nearly EUR 114 million, an increase of 5% and 19% respectively in volume and value, since 2020. In terms of volume, the majority of swordfish imports were from Ecuador (16%), China (15%), and Indonesia (13%). However, in terms of value the most important partner countries were Sri Lanka (18%), China (13%), and Morocco (13%) (Table 3). The majority (73%) of the imports in 2021 were frozen and the remaining import was fresh swordfish. Average price of the fresh swordfish imported in 2021 reached 10,05 EUR/kg while frozen swordfish was at 5,11 EUR/kg. Italy imported nearly 7.000 tonnes of swordfish at a value of EUR 45 million in 2021, covering 37% and 40% of total EU import volume and value respectively in 2021 (Table 4). Italy as importing country was followed by Portugal (5.224 tonnes and EUR 25 million) and Spain (4.250 tonnes and EUR 28 million).

Of the 500 tonnes of extra-EU exports of swordfish in 2021, 22% was headed to Singapore, 21% to the United States, and 20% to the United Kingdom. The majority of these exports were frozen (79%). As the largest fisheries nation, Spain was also the largest exporting MS covering 72% of total EU exports with a total of 360 tonnes exported at a value of around EUR 3 million in 2021.

Although Spain is the world's largest catching country of swordfish, the EU still experiences a trade deficit for swordfish with significantly higher extra-EU imports than extra-EU exports. Since 2017, extra-EU imports of swordfish have decreased by 65% while the imports of swordfish have decreased by 13%.

Table 28. **EXTRA-EU IMPORT BY PARTNER COUNTRIES (volumes in tonnes and values in EUR 1.000)**

| Partner Country | 2017          |                | 2018          |                | 2019          |                | 2020          |               | 2021          |                |
|-----------------|---------------|----------------|---------------|----------------|---------------|----------------|---------------|---------------|---------------|----------------|
|                 | Volume        | Value          | Volume        | Value          | Volume        | Value          | Volume        | Value         | Volume        | Value          |
| Ecuador         | 1.051         | 3.033          | 2.208         | 8.118          | 2.700         | 11.616         | 1.862         | 7.257         | 2.827         | 14.473         |
| China           | 2.088         | 10.723         | 2.231         | 12.069         | 2.138         | 12.468         | 1.888         | 9.265         | 2.683         | 15.294         |
| Indonesia       | 1.645         | 7.967          | 2.124         | 11.277         | 1.308         | 7.754          | 2.177         | 9.050         | 2.352         | 10.515         |
| Sri Lanka       | 1.213         | 10.426         | 1.628         | 16.575         | 1.913         | 19.505         | 1.612         | 17.366        | 1.799         | 20.282         |
| Chile           | 2.679         | 17.503         | 2.461         | 18.634         | 3.728         | 23.742         | 2.002         | 12.560        | 1.759         | 14.062         |
| Morocco         | 1.421         | 10.803         | 1.796         | 15.393         | 1.716         | 13.314         | 1.696         | 12.612        | 1.755         | 15.131         |
| Other           | 10.237        | 55.423         | 9.767         | 54.149         | 10.506        | 58.711         | 5.602         | 27.091        | 4.461         | 23.866         |
| <b>Total</b>    | <b>20.333</b> | <b>115.878</b> | <b>22.215</b> | <b>136.215</b> | <b>24.009</b> | <b>147.109</b> | <b>16.839</b> | <b>95.202</b> | <b>17.636</b> | <b>113.623</b> |

Source: EUMOFA elaboration of EUROSTAT-COMEXT.

Table 29. **EXTRA-EU IMPORT BY IMPORTING MEMBER STATES (volumes in tonnes and values in EUR 1.000)**

| Country      | 2017          |                | 2018          |                | 2019          |                | 2020          |               | 2021          |                |
|--------------|---------------|----------------|---------------|----------------|---------------|----------------|---------------|---------------|---------------|----------------|
|              | Volume        | Value          | Volume        | Value          | Volume        | Value          | Volume        | Value         | Volume        | Value          |
| Italy        | 6.281         | 38.966         | 6.883         | 46.804         | 7.247         | 51.334         | 5.375         | 34.394        | 6.597         | 45.128         |
| Portugal     | 6.587         | 32.347         | 6.809         | 35.328         | 7.663         | 39.113         | 4.689         | 20.026        | 5.224         | 24.957         |
| Spain        | 3.472         | 19.745         | 4.889         | 29.996         | 5.088         | 29.460         | 4.148         | 22.554        | 4.250         | 28.408         |
| France       | 1.296         | 10.386         | 1.241         | 11.178         | 1.306         | 11.719         | 1.017         | 9.428         | 1.227         | 12.351         |
| Germany      | 185           | 1.538          | 221           | 2.107          | 233           | 2.368          | 147           | 1.609         | 164           | 1.801          |
| Greece       | 324           | 1.404          | 300           | 1.331          | 448           | 2.016          | 250           | 928           | 87            | 306            |
| Other        | 2.188         | 11.492         | 1.872         | 9.471          | 2.024         | 11.099         | 1.213         | 6.263         | 87            | 672            |
| <b>Total</b> | <b>20.333</b> | <b>115.878</b> | <b>22.215</b> | <b>136.215</b> | <b>24.009</b> | <b>147.109</b> | <b>16.839</b> | <b>95.202</b> | <b>17.636</b> | <b>113.623</b> |

Source: EUMOFA elaboration of EUROSTAT-COMEXT.

<sup>61</sup> The UK has been removed as an EU MS for all years covered by this analysis. To ensure that the trade image described is accurate, previous (until the February 2020) intra-EU trade between the UK and other MS has been removed and readed as extra EU trade.

## 5.6 CONSUMPTION

The swordfish fishery is very important for Southern Europe, especially Spain and Italy, where swordfish is consumed the most. Swordfish is appreciated for its taste, firmness, and for the absence of bones. The meat is grey-white and has a firm texture. It is sold mainly as steaks or loins, fresh or frozen, sometimes skinned. It can also be found as cold-smoked slices. Its mild, sweet flavour is highly regarded, and it is consumed grilled, broiled, baked, or poached, and even raw as carpaccio *inter alia* in Italy<sup>62</sup>.

In the EU, apparent consumption of the commodity group “tuna and tuna-like species” includes 97% tuna and 3% swordfish<sup>63</sup>. Europe’s demand is mostly focused on frozen swordfish, rather than fresh swordfish. However, the current frozen swordfish market in Europe is still in recovery after Spain detected illegal swordfish entering from Indonesia and Vietnam in 2014<sup>64</sup>.

<sup>62</sup> <https://www.eumofa.eu/documents/20178/108141/MH+9+2017-+final.pdf>

<sup>63</sup> [https://www.eumofa.eu/documents/20178/477018/EN\\_The+EU+fish+market\\_2021.pdf/27a6d912-a758-6065-c973-c1146ac93d30?t=1636964632989](https://www.eumofa.eu/documents/20178/477018/EN_The+EU+fish+market_2021.pdf/27a6d912-a758-6065-c973-c1146ac93d30?t=1636964632989)

<sup>64</sup> <https://houseofocean.org/2014/09/29/catch-certificates-and-swordfish-imports-into-the-eu/>



## 6. Global highlights

**EU / Fisheries / Conservation:** On 9 February, the European Commission adopted a set of conservation measures to protect six areas defined under the Marine Strategy Framework Directive (MSFD) and five Natura 2000 sites in the Danish and Swedish parts of the Kattegat. Based on a joint initiative of Denmark, Sweden, and Germany, the action is a positive step towards reducing the impact of fishing activities on the seabed and habitats. The measures ensure the protection of sensitive species, will improve the ecological functioning of Marine Protected Areas (MPA), and will deliver on the European Green Deal and EU's biodiversity strategy for 2030<sup>65</sup>.



**EU / Algae:** The European Commission, the European Climate, Infrastructure and Environment Executive Agency (CINEA), and a consortium of sustainability consultants and algae organisations are launching a European algae stakeholder platform, called EU4Algae. The aim of the platform is to accelerate the development of the European algae industry and promote algae for nutrition and other uses among consumers and businesses in the EU. The platform will be a unique space for collaboration among European algae stakeholders including algae farmers, producers, sellers, consumers, and technology developers, as well as business-support organisations, investors, public authorities, academia, researchers, and NGOs. The platform will be online by the summer of 2022<sup>66</sup>.

**Iceland / Statistics:** The Icelandic Directorate of Fisheries has compiled data showing the catch composition of vessels that participate in bottom trawling and longline fishing, that were subject to the Directorate of Fisheries' surveillance in 2021. Data can be consulted [here](#)<sup>67</sup>.

**EU / Seafood / Overfishing:** Over one quarter of Europe's 20 most highly-fished marine species will be under extreme pressure by 2100 if nothing is done to simultaneously halt climate change, overfishing, and mercury pollution, according to a new study by the University of British Columbia (UBC). The study is one of the first to examine the combined effects of rising temperatures, overfishing, and mercury pollution on fish in EU waters. The results showed that impacts to Europe's fish stocks will vary widely depending on each species' average temperature tolerance, with seafood staples such as Norway lobster, common sole, great Atlantic scallop, red mullet, and European hake projected to decline both in abundance and in distribution as water temperatures reach lethal levels<sup>68</sup>.

**Netherlands / Fisheries / Innovations:** Two institutes of Wageningen University (Wageningen Marine Research and Agro Food Robotics), in cooperation with VisNed and several fishing vessels, are developing a digital tool to implement a fully documented fishery (FDF). The project has received just under EUR 3 million in support from the European Maritime and Fisheries Fund (EMFF). FDF introduces automated recognition of the size and species of each fish, distinguishing between catches fit for human consumption (above minimum size) and unwanted catches (below minimum size). Using remote electronic monitoring (REM) systems, the tool can determine the weight of the total catch<sup>69</sup>.

**World / Fisheries / Sustainability:** Many nations are calling for the protection of 30% of the world's oceans by 2030 from some or all types of exploitation, including fishing. Building off this proposal, a new analysis led by the University of Washington looks at how effective fishing closures are at reducing accidental catch. Researchers found that permanent Marine Protected Areas (MPA) are a relatively inefficient way to protect marine biodiversity that is accidentally caught in fisheries. Dynamic ocean management — changing the pattern of closures as accidental catch hotspots shift — is more effective. The results were published online on 17 January in the Proceedings of the National Academy of Sciences, a non-profit society of the USA<sup>70</sup>.

<sup>65</sup> [https://ec.europa.eu/oceans-and-fisheries/news/fisheries-conservation-reinforced-protection-11-vulnerable-sites-north-sea-kattegat-2022-02-09\\_en](https://ec.europa.eu/oceans-and-fisheries/news/fisheries-conservation-reinforced-protection-11-vulnerable-sites-north-sea-kattegat-2022-02-09_en)

<sup>66</sup> [https://ec.europa.eu/oceans-and-fisheries/news/european-commission-launches-platform-promote-production-and-use-algae-europe-2022-02-09\\_en](https://ec.europa.eu/oceans-and-fisheries/news/european-commission-launches-platform-promote-production-and-use-algae-europe-2022-02-09_en)

<sup>67</sup> <https://www.fiskistofa.is/umfiskistofu/frettir/afsamsetning-a-botnvorpu-og-dragnotaveidum-2021>

<sup>68</sup> <https://oceans.ubc.ca/2022/02/07/europes-most-valuable-marine-species-reduced-to-a-fraction-of-their-current-population-size-by-2100/>

<sup>69</sup> [https://ec.europa.eu/oceans-and-fisheries/news/fully-documented-fisheries-action-2022-01-31\\_en](https://ec.europa.eu/oceans-and-fisheries/news/fully-documented-fisheries-action-2022-01-31_en)

<sup>70</sup> <https://www.washington.edu/news/2022/01/17/shifting-ocean-closures-best-way-to-protect-animals-from-accidental-catch/>

## 7. Macroeconomic Context

### 7.1. Marine fuel

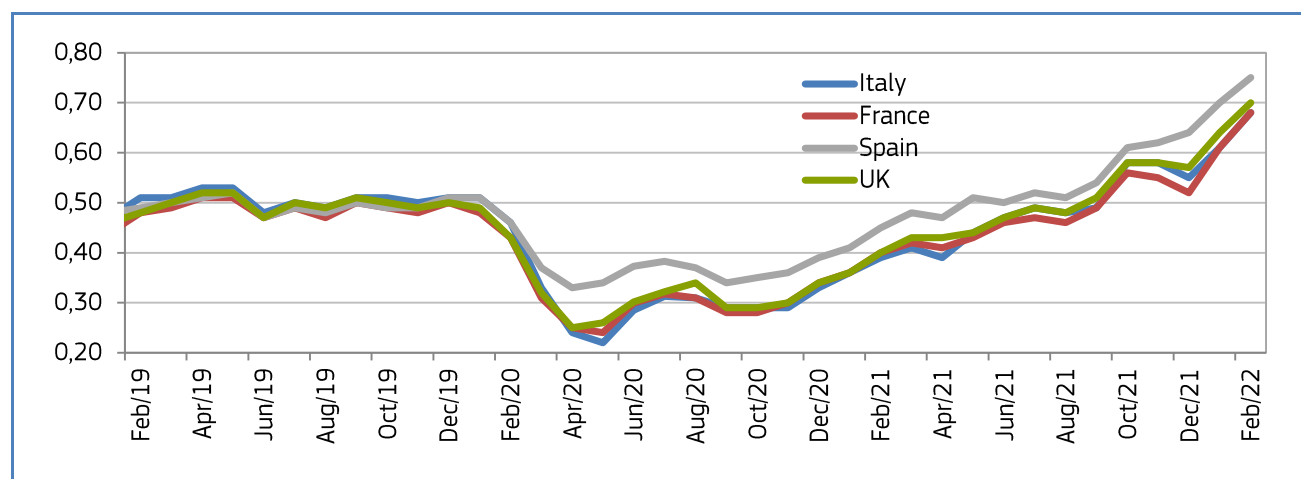
Average prices for marine fuel in **February 2022** ranged from 0,68 to 0,75 EUR/litre in ports in **France, Italy, Spain**, and the **UK**. Average prices increased by 10% compared with the previous month and increased by an average of 71% compared with the same month in 2021.

Table 30. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

| Member State                                     | Feb 2022 | Change from Jan 2022 | Change from Feb 2021 |
|--------------------------------------------------|----------|----------------------|----------------------|
| France<br><i>(ports of Lorient and Boulogne)</i> | 0,68     | 11%                  | 70%                  |
| Italy<br><i>(ports of Ancona and Livorno)</i>    | 0,68     | 11%                  | 74%                  |
| Spain<br><i>(ports of A Coruña and Vigo)</i>     | 0,75     | 7%                   | 67%                  |
| The UK<br><i>(ports of Grimsby and Aberdeen)</i> | 0,70     | 9%                   | 75%                  |

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

Figure 59. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

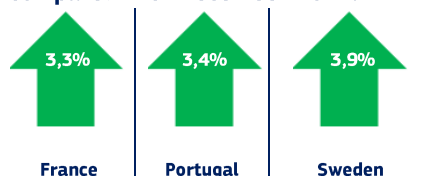


Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

### 7.2. Consumer prices

The EU annual inflation rate was at 5,6% in January 2022, up from 5,3% in December 2021. A year earlier, the rate was 1,2%.

**Inflation: Lowest rates in January 2022, compared with December 2021.**



**Inflation: Highest rates in January 2022, compared with December 2021.**



Table 31. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

|                                         | Jan 2020 | Jan 2021 | Dec 2021 | Jan 2022 | Change from Dec 2021 |      | Change from Jan 2021 |      |
|-----------------------------------------|----------|----------|----------|----------|----------------------|------|----------------------|------|
| <b>Food and non-alcoholic beverages</b> | 108,10   | 109,28   | 112,87   | 114,48   | ↑                    | 1,4% | ↑                    | 4,8% |
| <b>Fish and seafood</b>                 | 113,87   | 114,47   | 117,23   | 119,49   | ↑                    | 1,9% | ↑                    | 4,4% |

Source: Eurostat.

### 7.3. Exchange rates

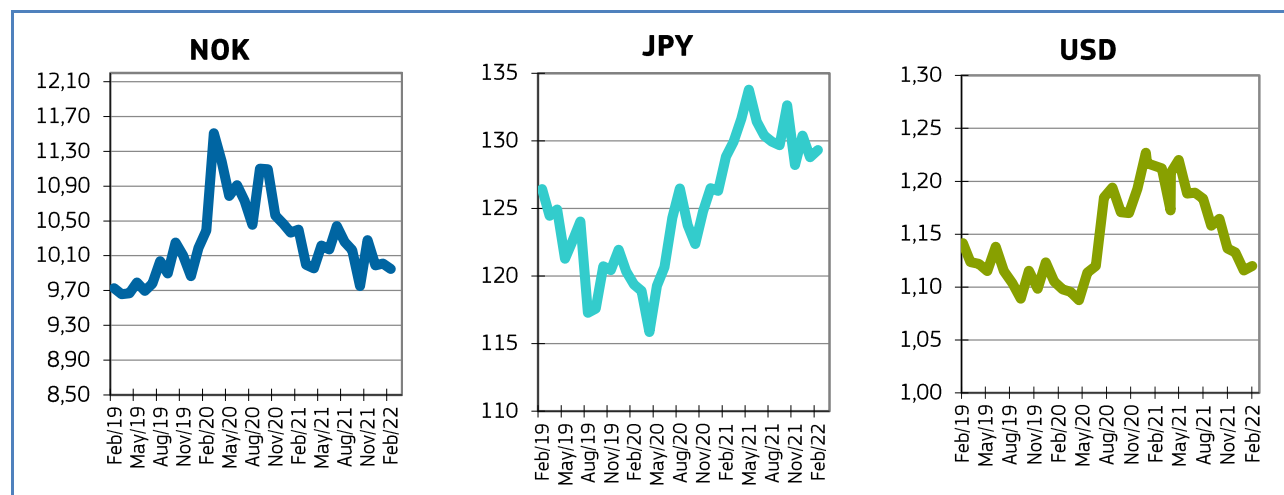
Table 32. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

| Currency | Feb 2020 | Feb 2021 | Jan 2021 | Feb 2022 |
|----------|----------|----------|----------|----------|
| NOK      | 10,3888  | 10,4012  | 10,0085  | 9,9465   |
| JPY      | 119,36   | 128,83   | 128,79   | 129,31   |
| USD      | 1,0977   | 1,2121   | 1,1156   | 1,1199   |

Source: European Central Bank.

In February 2022, the euro appreciated against the Japanese yen (0,4%) and the US dollar (0,1%), and depreciated against the Norwegian krone (-0,6%), relative to the previous month. For the past six months, the euro has fluctuated around 1,14 against the US dollar. Compared with February 2021, the euro has appreciated 0,4% against the Japanese yen, depreciated 4,4% against the Norwegian krone, and depreciated 7,6% against the US dollar.

Figure 60. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

Manuscript completed in March 2022.

The European Commission is not liable for any consequence stemming from the reuse of this publication.

Luxembourg: Publications Office of the European Union, 2022

© European Union, 2022



The reuse policy of European Commission documents is implemented based on Commission Decision 2011/833/EU of 12 April 2011 on the reuse of Commission documents (OJ L 330, 14.12.2011, p. 39).

Except otherwise noted, the reuse of this document is authorised under a Creative Commons Attribution 4.0 International (CC-BY 4.0) licence (<https://creativecommons.org/licenses/by/4.0/>). This means that reuse is allowed provided appropriate credit is given and any changes are indicated.

For any use or reproduction of elements that are not owned by the European Union, permission November need to be sought directly from the respective rightsholders. The European Union does not own the copyright in relation to the following elements:

Images © Cover photo and pages 14, 49 © EUROFISH.

Page 19 © Scandinavian Fishing Yearbook

Page 33 © Wikimedia.

Page 41 © Shutterstock.

PDF ISSN 2314-9671      KL-AK-22-02-EN-N

FOR MORE INFORMATION AND COMMENTS:

Directorate-General for Maritime Affairs and Fisheries

B-1049 Brussels

E-mail: [contact-us@eumofa.eu](mailto:contact-us@eumofa.eu)

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

**First sales:** EUR-Lex, DG MARE– European Commission.

**Consumption:** EUROPANEL.

**Case studies:** Statistics Tunisia, National observatory of Agriculture in Tunisia, Ministère de l'Agriculture. Groupement Interprofessionnel des Produits de la Pêche Tunisia, FAO, FAO FishStat, STECF, Centre Technique d'Aquaculture, Global Aquaculture Information network, European Commission, Eurostat Comext, Scandinavian Fishing Year Book, EUR-Lex, European Commission, Inter-American-Tropical-Tuna-Commission, FAO, EUMOFA, Eurostat, Mercamadrid, House of Ocean.

**Global highlights:** DG Mare - European Commission, The Directorate of Fisheries Iceland, Institute for the Oceans and Fisheries, The University of British Columbia, University of Washington.

**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.

The EUMOFA website is publicly available at the following address: [www.eumofa.eu](http://www.eumofa.eu).

EUMOFA **Privacy Policy**



Publications Office  
of the European Union