European Commission

Monthly Highlights

No. 5 / 2022

EUMOFA

European Market Observatory for Fisheries and Aquaculture Products

In this issue

Of all "commodity groups" in the countries monitored by EUMOFA, that of "small pelagics" accounted for the highest volumes of first sales and the third highest first-sales value in February 2022.

Over the 36-month observation period (March 2019–February 2022), the weighted average first-sales price of European anchovy in Italy was 2,58 EUR/kg, 133% higher than that of France (1,11 EUR/kg), and 57% greater than that of Spain (1,64 EUR/kg).

Over the past three years (March 2019–February 2022), the average French household consumption of fresh whiting was 340 tonnes.

The EU trade balance in fisheries and aquaculture products (FAPs) remains negative, confirming the EU's dependence on imports. In 2021 the fisheries and aquaculture trade deficit reached EUR −19,69 billion, the highest in the past ten years, and an increase of 9,3% from the previous year.

In 2021, the EU imported 368.000 tonnes of FAPs from the UK at a value of 1,507 billion EUR. Although these amounts were lower than the previous two years, import of certain species increased both in volume and value.

In late April, Norway and the EU reached a political understanding in relation to the fisheries in the Northeast Arctic, in ICES subareas 1 and 2.

Contents

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

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1. First sales in Europe

During **January–February 2022**, 11 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups[1]. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section "*First sales in Europe*" are extracted from EUMOFA[2].

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

Increases in value and volume: Bulgaria, France, the Netherlands, and Portugal were the countries that recorded an increase in both first-sales value and volume. Small pelagic species, namely herring and Atlantic horse mackerel, were principally responsible for increases in the Netherlands, while anchovy and octopus were responsible for increases in Portugal.

Decreases in value and volume: Cyprus, Estonia, Italy, Latvia, Lithuania, and Sweden recorded decreases in first-sales value and volume. Lithuania stood out with the most significant drop in absolute terms, which was due to lower first-sales value of smelt and lower volume of herring.

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

	January – February 2020		January – February 2021		January – February 2022		Change from January – February 2021	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Bulgaria	93	0,2	53	0,1	68	0,2	28%	41%
Cyprus	48	0,4	48	0,4	42	0,3	-12%	-17%
Estonia	10.212	3,0	16.973	3,8	12.430	2,9	-27%	-24%
France	30.936	108,5	31.984	106,7	32.257	123,0	1%	15%
Italy	12.954	50,2	11.652	45,9	9.586	44,3	-18%	-3%
Latvia	7.708	1,4	9.384	2,0	6.297	1,4	-33%	-32%
Lithuania	326	0,2	725	0,4	243	0,2	-66%	-55%
Netherlands	33.863	52,3	26.858	36,4	44.696	48,1	66%	32%
Portugal	9.625	34,0	7.800	28,6	10.122	44,2	30%	55%
Spain	61.657	202,6	48.965	164,0	47.764	179,8	-2%	10%
Sweden	22.000	1,0	44.485	1,4	25.679	1,2	-42%	-20%
Norway	566.543	592,7	587.003	530,0	541.599	566,6	-8%	7%
United Kingdom	62.769	132,8	62.397	100,6	61.381	114,0	-2%	13%

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

[1] Bivalves, other molluscs and aquatic invertebrates, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, salmonids, small pelagics, tuna and tuna-like species, and other marine fish.
[2] First sales data updated on 16.4.2022.

1.2. February 2022 compared to February 2021

Increases in value and volume: First sales increased in Bulgaria, the Netherlands, Portugal, Spain, Norway, and the United Kingdom. Clams were behind the sharp increases in Bulgaria, while Atlantic horse mackerel and herring were the main causes of higher first sales in the Netherlands.

Decreases in value and volume: First sales decreased in Cyprus, Estonia, Italy, Latvia, Lithuania, and Sweden. Latvia, Lithuania, and Sweden saw decreases due to sprat and herring.

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

	February 2019		February 2021		February 2022		Change from February 2021	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Bulgaria	50	0,1	27	0,1	41	0,1	52%	55%
Cyprus	20	0,2	25	0,2	20	0,2	-20%	-23%
Estonia	4.534	1,1	7.627	1,7	6.066	1,3	-20%	-22%
France	14.715	51,3	15.943	53,2	15.481	60,8	-3%	14%
Italy	6.342	24,4	6.519	25,4	5.033	23,8	-23%	-6%
Latvia	3.888	0,7	5.555	1,2	3.773	0,8	-32%	-34%
Lithuania	191	0,1	376	0,2	69	0,1	-82%	-66%
Netherlands	21.396	30,0	20.060	22,2	36.661	29,4	83%	32%
Portugal	5.128	17,9	3.662	13,6	4.515	20,8	23%	53%
Spain	33.723	100,6	25.354	83,9	25.926	92,1	2%	10%
Sweden	10.545	0,5	22.661	0,7	1.862	0,3	-92%	-65%
Norway	337.299	341,8	315.138	311,1	336.710	352,9	7%	13%
United Kingdom	29.613	59,6	15.766	31,9	17.196	36,0	9%	13%

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

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

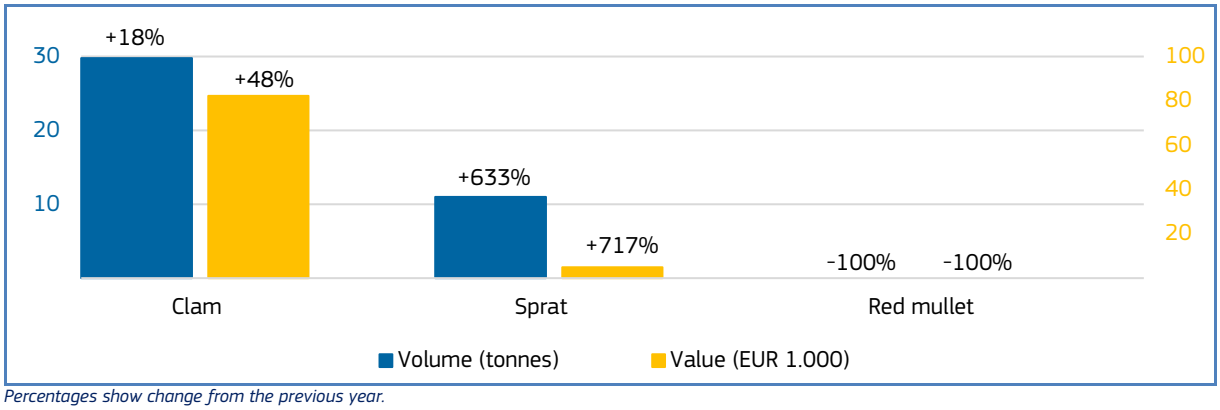
1.3. First sales in selected countries

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

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 0,15 million, +41%	68 tonnes, +28%	Clam, sprat.
Feb 2022 vs Feb 2021	EUR 0,09 million, +55%	41 tonnes, +52%	Clam, sprat. Red mullet slightly offset the decline.

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

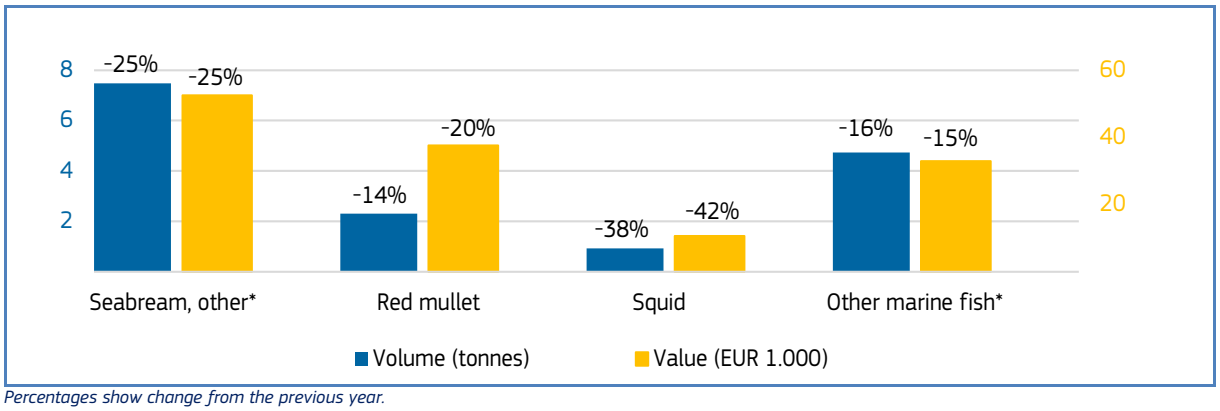


Percentages show change from the previous year.

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 0,3 million, -17%	42 tonnes, -12%	Other seabream* (other than gilthead seabream), red mullet, squid, picarel.
Feb 2022 vs Feb 2021	EUR 0,2 million, -23%	20 tonnes, -20%	Other seabream (other than gilthead seabream), red mullet, squid, other marine fish*.

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



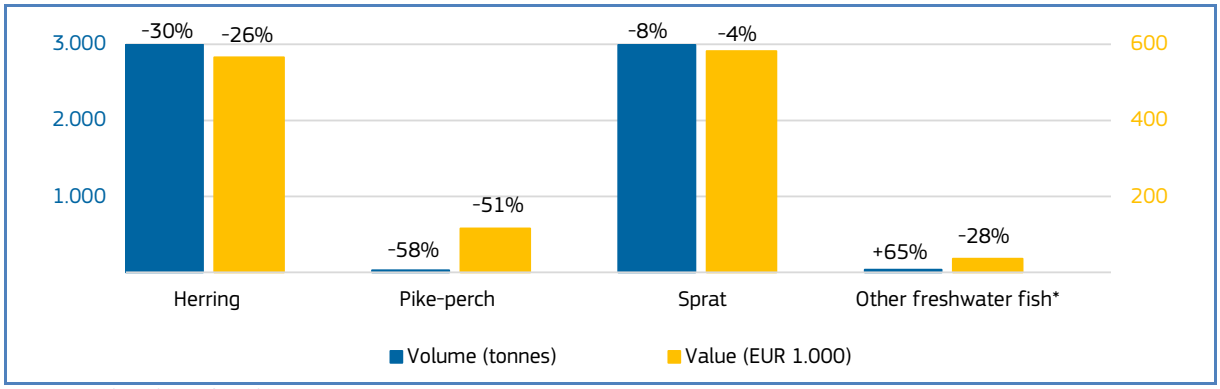
Percentages show change from the previous year.
**EUMOFA aggregation for species. Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies*

[3] First-sales data updated on 16.4.2022.

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 2,9 million, -24%	12.430 tonnes, -27%	Herring, sprat, pike-perch.
Feb 2022 vs Feb 2021	EUR 1,3 million, -22%	6.066 tonnes, - -20%	Herring, sprat, pike-perch, other freshwater fish*.

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

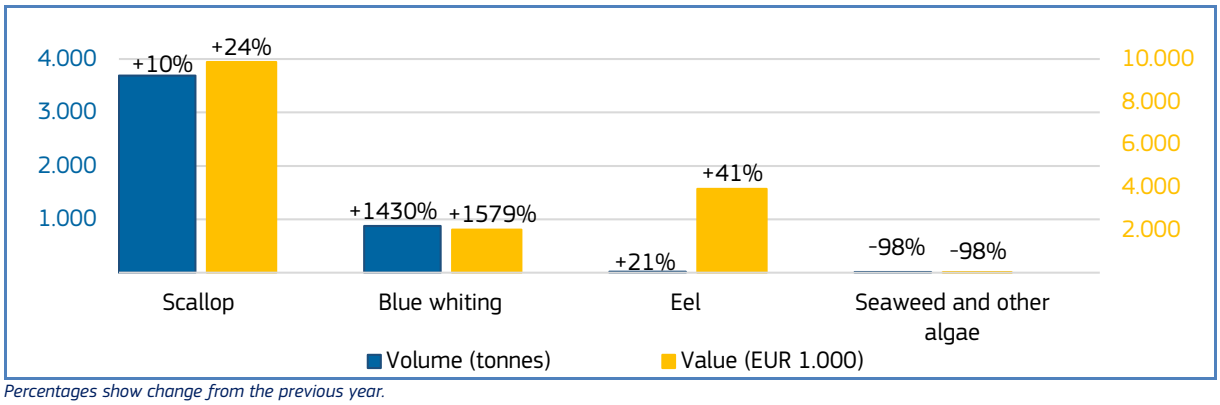


Percentages show change from the previous year.
**EUMOFA aggregation for species.*

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 123,0 million, +15%	32.257 tonnes, +1%	**Value**: Scallop, octopus, eel. **Volume**: Scallop, blue whiting, saithe.
Feb 2022 vs Feb 2021	EUR 60,8 million, +14%	15.481 tonnes, -3%	**Value**: Scallop, blue whiting, eel. **Volume**: Seaweed and other algae, common sole.

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

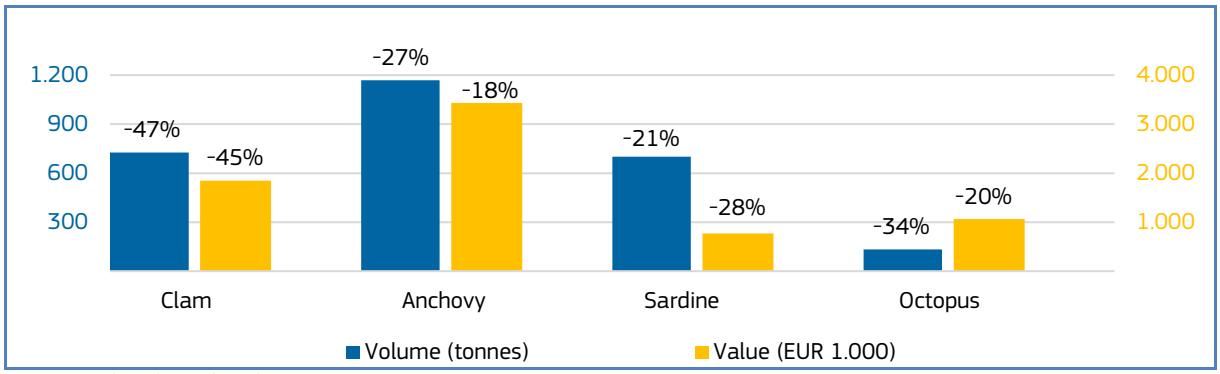


Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 44,3 million, -3%	9.586 tonnes, -18%	Clam, anchovy, sardine.
Feb 2022 vs Feb 2021	EUR 23,8 million, -6%	5.033 tonnes, -23%	Clam, anchovy, sardine, octopus.

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

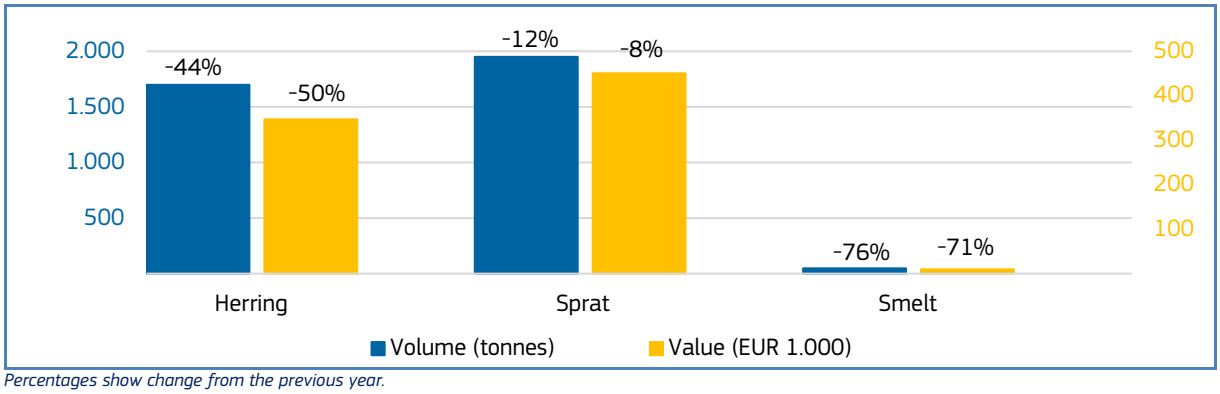


Percentages show change from the previous year.

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 1,4 million, -32%	6.297 tonnes, -33%	Herring, sprat, smelt, other marine fish*.
Feb 2022 vs Feb 2021	EUR 0,8 million, -34%	3.773 tonnes, -32%	Herring, sprat, smelt.

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

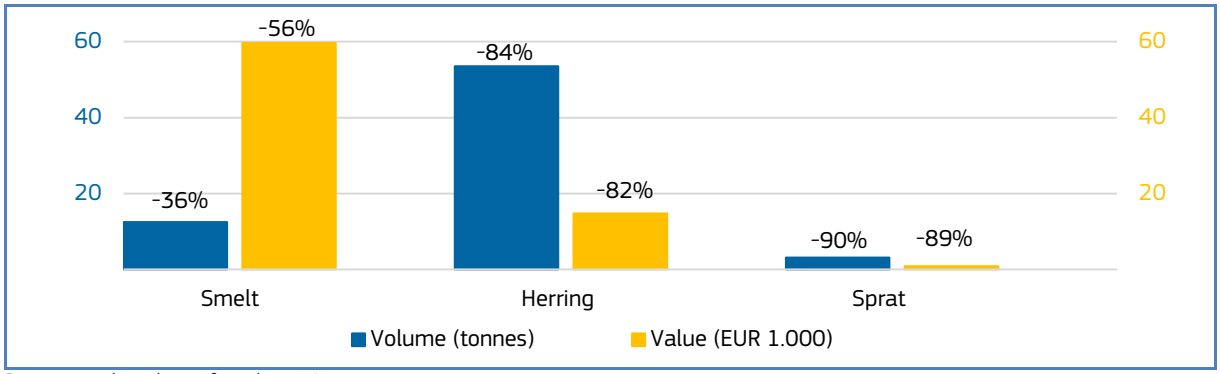


Percentages show change from the previous year.
**EUMOFA aggregation for species.*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 0,2 million, -55%	243 tonnes, -66%	Smelt, herring, sprat.
Feb 2022 vs Feb 2021	EUR 0,08 million, -66%	69 tonnes, -82%	Smelt, herring, sprat.

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

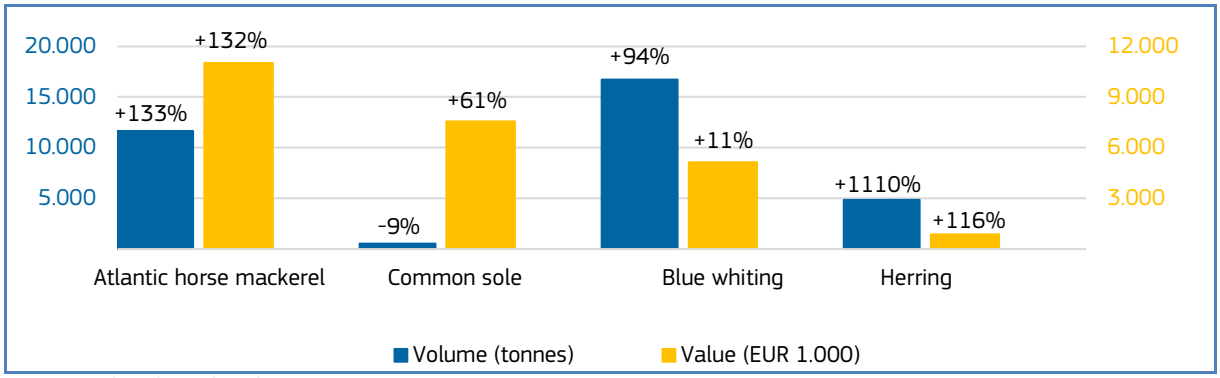


Percentages show change from the previous year.

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

the Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 48,1 million, +32%	44.696 tonnes, +66%	Atlantic horse mackerel, common sole, herring, blue whiting.
Feb 2022 vs Feb 2021	EUR 29,4 million, +32%	36.661 tonnes, +83%	Atlantic horse mackerel, common sole, herring, blue whiting.

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

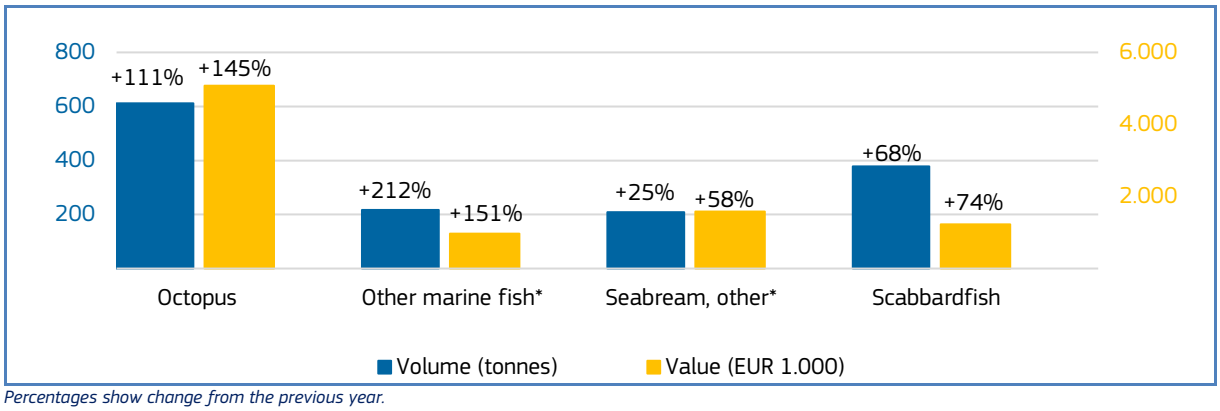


Percentages show change from the previous year.

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 44,2 million, +55%	10.122 tonnes, +30%	Octopus, anchovy, squid, other seabream* (other than gilthead).
Feb 2022 vs Feb 2021	EUR 20,8 million +53%	4.515 tonnes, +23%	Octopus, other marine fish*, other seabream* (other than gilthead), scabbardfish.

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

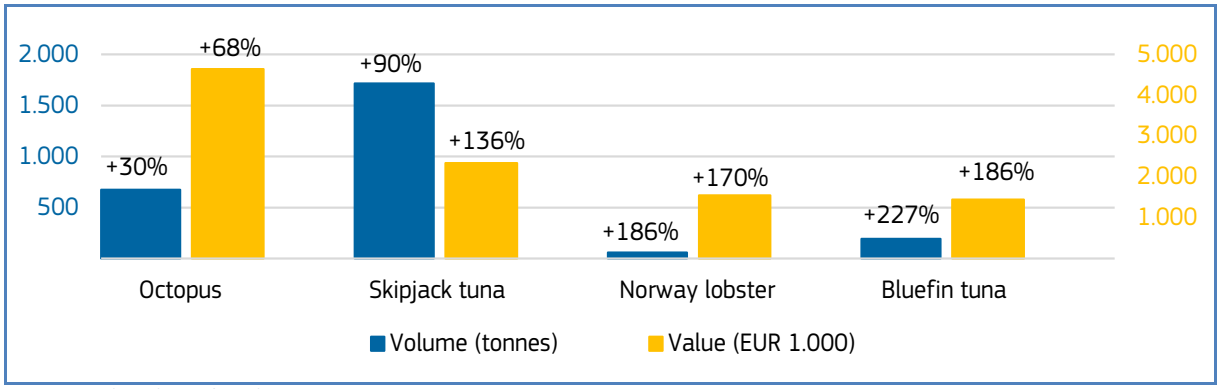


Percentages show change from the previous year.
**EUMOFA aggregation for species.*

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 179,8 million, +10%	47.763 tonnes, -2%	**Value**: Octopus, swordfish, squid, miscellaneous shrimps*. **Volume**: Yellowfish tuna, hake, other sharks*.
Feb 2022 vs Feb 2021	EUR 92,1 million +10%	25.926 tonnes, +2%	Octopus, skipjack tuna, Norway lobster, bluefin tuna.

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

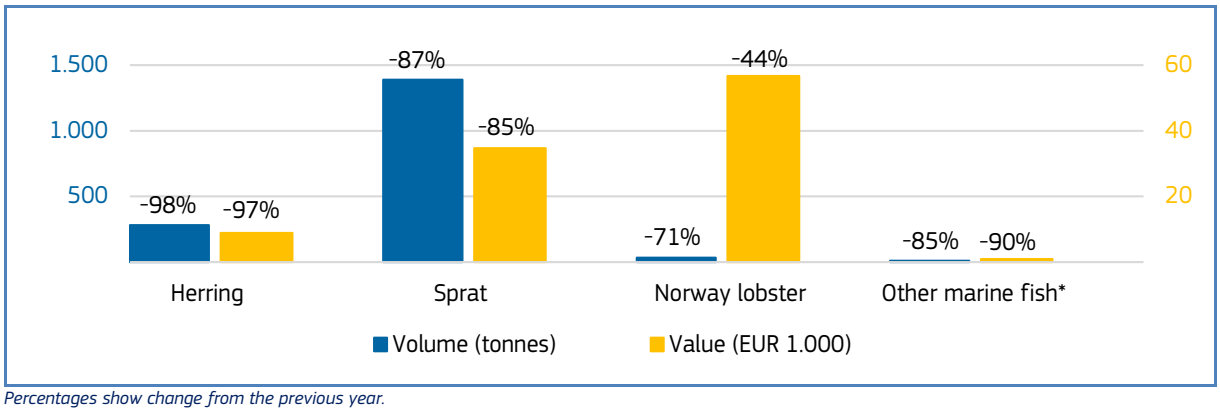


Percentages show change from the previous year.
**EUMOFA aggregation for species.*

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 1,2 million, -20%	25.679 tonnes, -42%	Herring, Norway lobster, sprat.
Feb 2022 vs Feb 2021	EUR 0,3 million, -65%	1.862 tonnes, -92%	Herring, Norway lobster, sprat, other marine fish*.

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, FEBRUARY 2022**

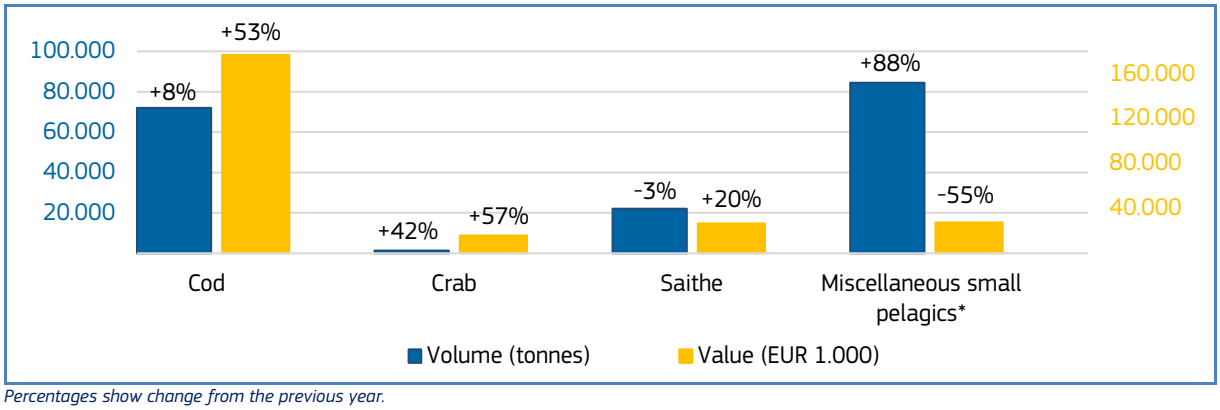


Percentages show change from the previous year.
**EUMOFA aggregation for species.*

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2022 vs Jan-Feb 2021	EUR 566,6 million, +7%	541.599 tonnes, -8%	**Value:** cod, crab, saithe. **Volume:** herring, mackerel, seaweed and other algae*, blue whiting
Feb 2022 vs Feb 2021	EUR 352,9 million +13%	336.710 tonnes, +7%	Cod, crab, saithe, miscellaneous small pelagics*.

Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, FEBRUARY 2022**

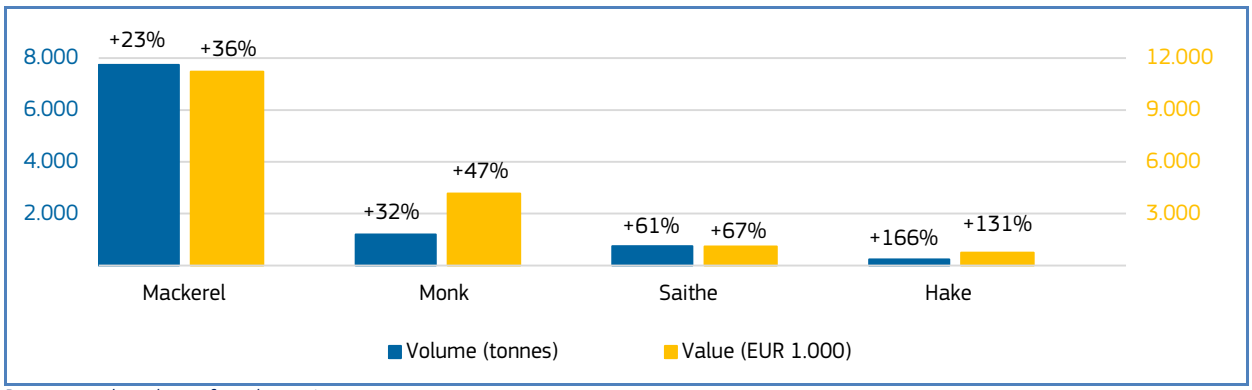


Percentages show change from the previous year.
**EUMOFA aggregation for species.*

Table 15. **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	Notes
Jan-Feb 2022 vs Jan-Feb 2021	EUR 114,0 million, +13%	61.381 tonnes, -2%	**Value**: Monkfish, squid, mackerel. **Volume**: Mackerel.	In February 2022, when compared with February 2021, there was a significant increase in first sales of hake. This is because hake was in high demand from Europe, mainly Spain. There have also been direct landings by Spanish vessels into Ullapool in Scotland.
Feb 2022 vs Feb 2021	EUR 36,0million, +13%	17.196 tonnes, +9%	Mackerel, monkfish, saithe, hake.	

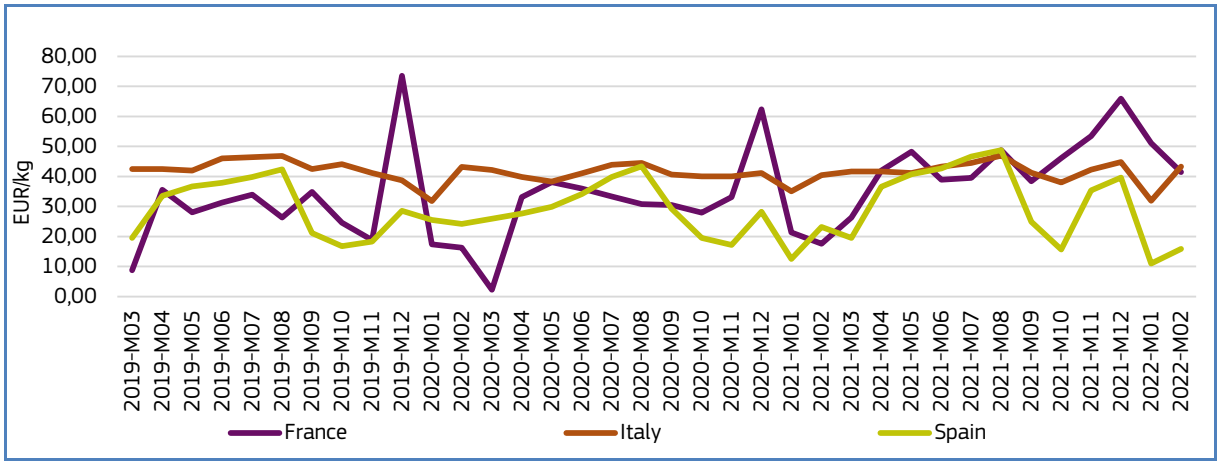
Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, FEBRUARY 2022**



Percentages show change from the previous year.

1.4. Comparison of first-sales prices of selected species in selected countries[4]

Figure 14. **FIRST-SALES PRICES OF ROCK LOBSTER AND SEA CRAWFISH IN FRANCE, ITALY, AND SPAIN**

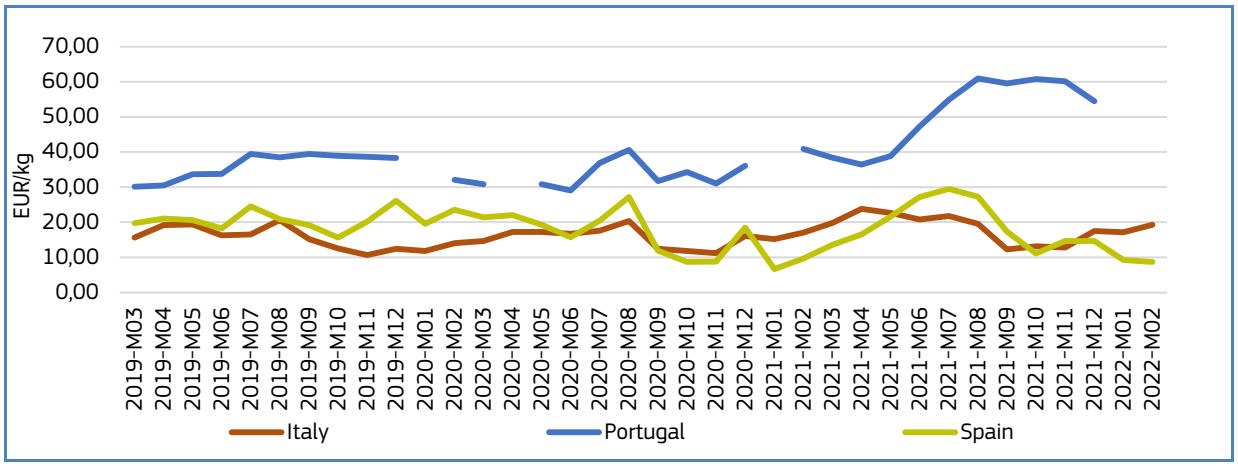


EU first sales of **rock lobster** and **sea crawfish**[5] occur predominantly in **Spain**, as well as in **France** and **Italy**. In February 2022, the average first-sales prices of rock lobster and sea crawfish were 41,48 EUR/kg in France (down by 19% from the previous month but up by 136% from the previous year); 43,22 EUR/kg in Italy (up from both January 2022 and February 2021 by 36% and 7%, respectively); and 15,83 EUR/kg in Spain (up from the previous month by 45%, and down from the

[4] First sales data updated on 16.4.2022.
[5] MCS grouping 'Rock lobster and sea crawfish' include the following ERS species: common spiny lobster, crylets, lesser slipper lobster, Mediterranean slipper lobster, Palinurid spiny lobster nei, pink spiny lobster, royal spiny lobster, rugose squat lobster, slipper lobster nei., spiny lobster nei.

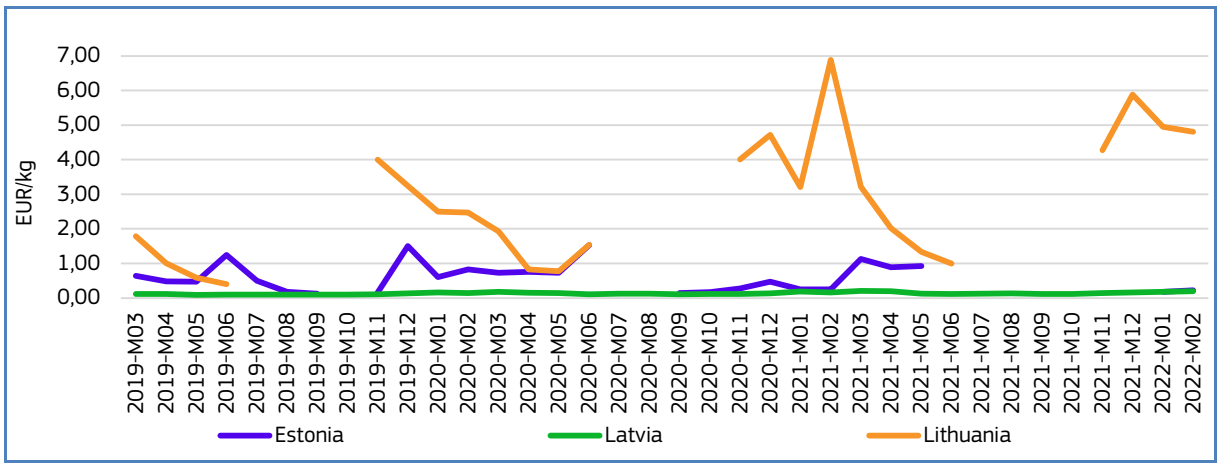
previous year by 32%). In February 2022, supply increased in Spain (+ 53%), and decreased in both France and Italy, relative to the previous year (–75% and –54%, respectively). Volumes sold in the three markets exhibit highly seasonal peaks: July–September in France, May–August in Italy, and June–August in Spain. Over the past 36 months, rock lobster and sea crawfish prices showed an upward trend in France and remained stable in Italy and Spain. At the same time, supply showed a downward trend in Italy and Spain, and an upward trend in France.

Figure 15. **FIRST-SALES PRICES OF WARMWATER SHRIMP IN ITALY, PORTUGAL, AND SPAIN**



EU first sales of **warmwater shrimp**[6] occur mainly in **Italy**, **Portugal**, and **Spain**. In February 2022, the average first-sales prices of warmwater shrimp were: 19,32 EUR/kg in Italy (up by 13% from both the previous month and year); 49,40 EUR/kg in Portugal (up by 21% from February 2021; first-sales data for January 2021 is not available); and 8,75 EUR/kg in Spain (down from both the previous month and year by 6% and 10%, respectively). In February 2022, supply increased in Portugal (+95%), and decreased in both Italy and Spain, relative to the previous year (–23% and –24%, respectively). Supply is seasonal, with peaks between November and December in Italy, and between September and December in Spain. In Portugal, supply does not seem to exhibit a clear seasonality. Over the 36-month period observed, warmwater shrimp prices exhibited an upward trend in Italy and Portugal, and the opposite in Spain. At the same time volume went down in Portugal and increased in Italy and Spain.

Figure 16. **FIRST-SALES PRICES OF SMELT IN ESTONIA, LATVIA, AND LITHUANIA**



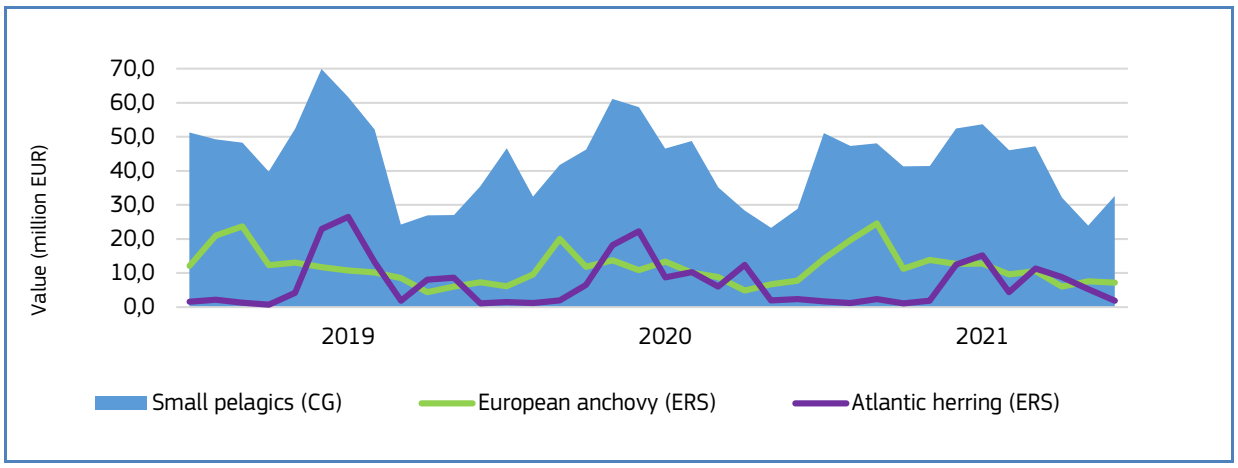
EU first sales of **smelt** occur in multiple countries, including **Estonia**, **Latvia**, and **Lithuania**. In February 2022, the average first-sales prices of smelt were 0,22 EUR/kg in Estonia (up from the previous month by 24% and down from the previous year by 9%); 0,20 EUR/kg in Latvia (up from both the previous month and year by 13% and 21%, respectively); and 4,80 EUR/kg in Lithuania (down by 3% from January 2022, and down by 30% from February 2021). In February 2022,

[6] Warmwater shrimp is an MCS grouping that includes 23 ERS species of fish. The top three in terms of first-sales value are caramote prawn, scarlet shrimp, and common spiny lobster. For the full list of ERS species visit Metadata 2, Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies

supply increased in Estonia (+15%), and decreased in both Latvia and Lithuania (–76% and –36%, respectively), relative to the previous year. Volumes sold in the three markets are highly seasonal: supply peaks in Estonia in April, in Latvia in August, and in Lithuania in January. Over the past three years, prices exhibited an upward trend in Latvia and Lithuania, and the opposite in Estonia, while supply went up in all three markets.

1.5. Commodity group of the month: small pelagics[7]

Figure 17. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES[8], MARCH 2018 - FEBRUARY 2022**



In February 2022, the "**small pelagics**" commodity group (CG[9]) recorded the highest volume and the third highest first-sales value out of the 10 CGs in the countries monitored by EUMOFA[10]. In the reporting countries covered by the EUMOFA database, first sales of "small pelagics" totalled a value of EUR 32,6 million and a volume of 39.052 tonnes, representing a value increase of 14% and a volume decrease by 29% compared to February 2021. In the past 36 months, the highest first-sales value of small pelagics was registered at EUR 69,9 million in August 2019.

The "small pelagics" commodity group includes seven Main Commercial Species (MCS): anchovy, herring, Atlantic horse mackerel, mackerel, sardine, sprat, and miscellaneous small pelagics[11]. At the Electronic Recording and Reporting System (ERS) level, Atlantic herring (6%) and European anchovy (22%) together accounted for 28% of the total first-sales value for "small pelagics" recorded in February 2022.

1.6. Focus on Atlantic herring

Atlantic herring (*Clupea harengus*) is economically the most important herring species in the family *Clupeidae*. It is widely distributed in the Northwest and Northeast Atlantic and congregates in large schools, migrating between spawning and wintering grounds in coastal areas, and feeding grounds in open waters. Atlantic herring can live for up to 10 years and reach 40 cm in length (average size is 20-30 cm) and almost 700 g in weight. They are demersal spawners, depositing their sticky eggs on coarse sand, gravel, shells, and small stones at depths of 15-40 m. Herring represent an important prey species for many predators, including cod, dogfish and other sharks, marine mammals, and seabirds[12].

Atlantic herring is mainly caught by pelagic trawlers (mid-water, pair, and otter) and purse seiners. The main stocks fished in EU waters are found in the Baltic Sea, the North Sea, and west of Scotland. Herring catches are seasonal and subject to total allowable catches (TACs) set based on precautionary considerations. In the Baltic Sea, specifically in subdivisions 25 and 26, and according to Council Regulation (EU) 2019/1838 of 30 October 2019, it was prohibited to fish cod quota from 1 May to 31 August 2021 for all vessels (with the exception of small-scale vessels less than 12 metres in length that use passive and

[7] First sales data updated on 16.4.2022.
[8] Norway and the UK excluded from the analyses.
[9] **Annex 3**: http://eumofa.eu/supply-balance-and-other-methodologies
[10] More data on commodity groups can be found in Table 1.2 of the Annex.
[11] Greater argentine accounts for the highest first-sales value and volume within the miscellaneous small pelagics category.
[12] https://www.ices.dk/about-ICES/projects/EU-RFP/EU%20Repository/ICES%20FIshMap/ICES%20FishMap%20species%20factsheet-herring.pdf

other allowed gear in waters less than 20 metres deep). This restriction also affected the herring fishery as it was not possible to avoid cod bycatch[13].

Gear restrictions and a minimum conservation reference size limit (20 cm) are also in place in EU waters[14]. In Norway there is a minimum size of 25 cm[15] for spring-spawning herring. The North Sea Atlantic herring fisheries are jointly managed through a trilateral agreement between the EU, Norway, and the United Kingdom. This agreement involves long-term management plans which are based on a catch quota system, set annually[16].

Denmark, Norway, Iceland, and the United Kingdom are among the main fishing nations of Atlantic herring. On the market, herring is sold mainly whole, fresh, marinated and smoked.

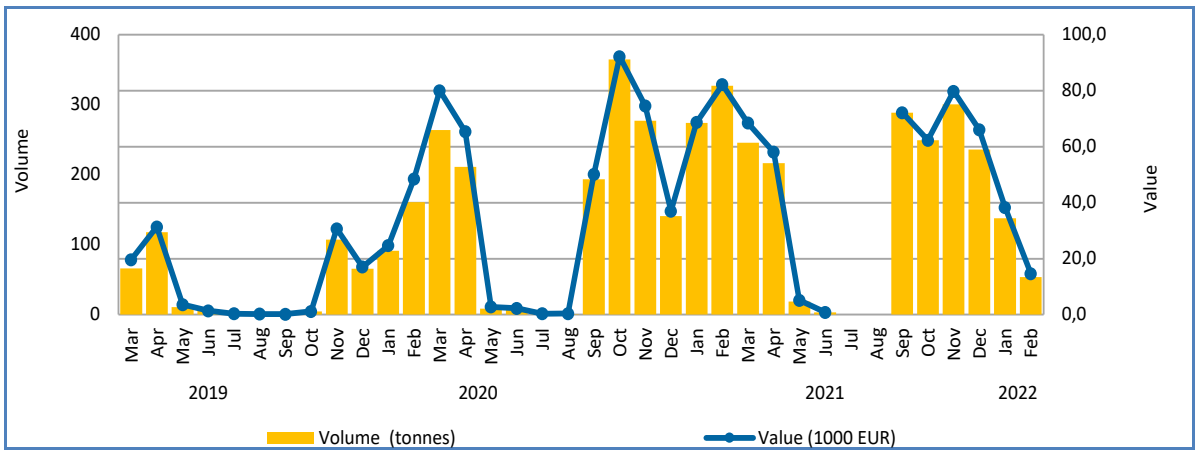
We have covered **Atlantic herring** in the following *Monthly Highlights*:
First sales: MH 3/2019 (Denmark, the Netherlands, Sweden), MH 5/2021 (Estonia, Latvia, Poland)
Topic of the month: "Atlantic herring in the EU" MH4/2018.

Selected countries

Table 18. **COMPARISON OF ATLANTIC HERRING FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "SMALL PELAGICS" IN SELECTED COUNTRIES**

Atlantic herring		Changes in Atlantic herring first sales Jan-Feb 2022 (%)		Contribution of Atlantic herring to total "small pelagics" first sales in February 2022 (%)	Principal places of sale Jan-Feb 2022 in terms of first-sales value
		Compared to Jan-Feb 2021	Compared to Jan-Feb 2020		
Lithuania	**Value**	-65%	-28%	95%	Klaipėda, Sventoji, Palanga (100% of first sales)
	Volume	-68%	-24%	95%	
Netherlands	**Value**	+584%	-37%	7%	Scheveningen, IJmuiden/Velsen, Vlissingen.
	Volume	+1285%	-27%	27%	
Sweden	**Value**	-66%	-43%	20%	Goteborg and other unspecified ports.
	Volume	-72%	-54%	17%	

Figure 18. **ATLANTIC HERRING: FIRST SALES IN LITHUANIA, MARCH 2019 - FEBRUARY 2022**



[13] Council Regulation (EU) 2019/1838 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32019R1248%20
[14] Regulation (EU) 2019/1241 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02019R1241-20220101
[15] https://www.fiskeridir.no/English/Fishing-in-Norway/Minimum-sizes
[16] https://ec.europa.eu/commission/presscorner/detail/en/IP_21_1206

Over the past 36 months, the highest first-sales value of Atlantic herring in **Lithuania** occurred in October 2020 when 365 tonnes were sold for about EUR 92.000. In general, first sales were high from November to April, while they were low (or minor or zero) from May to August due to restrictions[17] set by the EU. This included cod fishery restrictions in subdivisions 25 and 26 of the Baltic Sea from 1 May to 31 August, which affected supply of herring in the Lithuanian market. In pelagic fisheries of herring and sprat, cod is a bycatch species.

Figure 19. **FIRST SALES: COMPOSITION OF "SMALL PELAGICS" (ERS LEVEL) IN LITHUANIA IN VALUE AND VOLUME, FEBRUARY 2022**

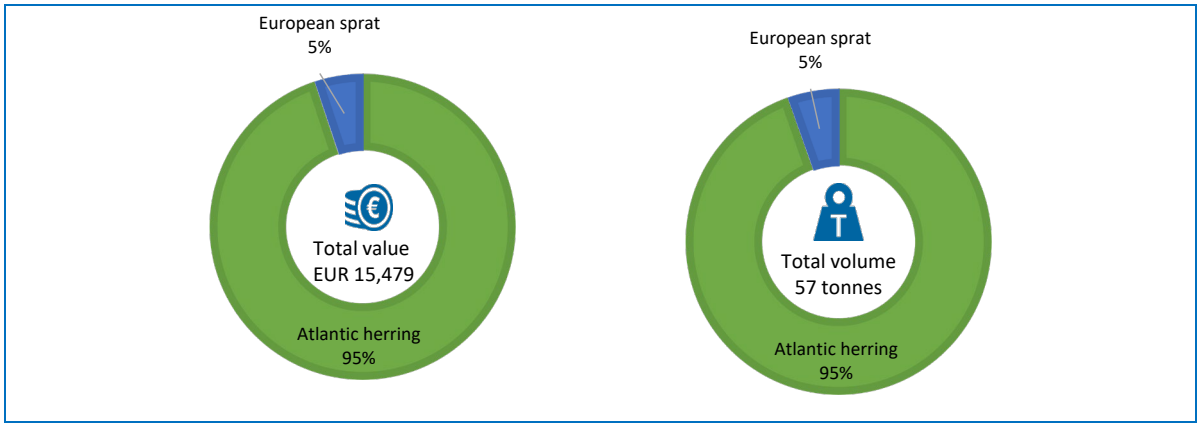
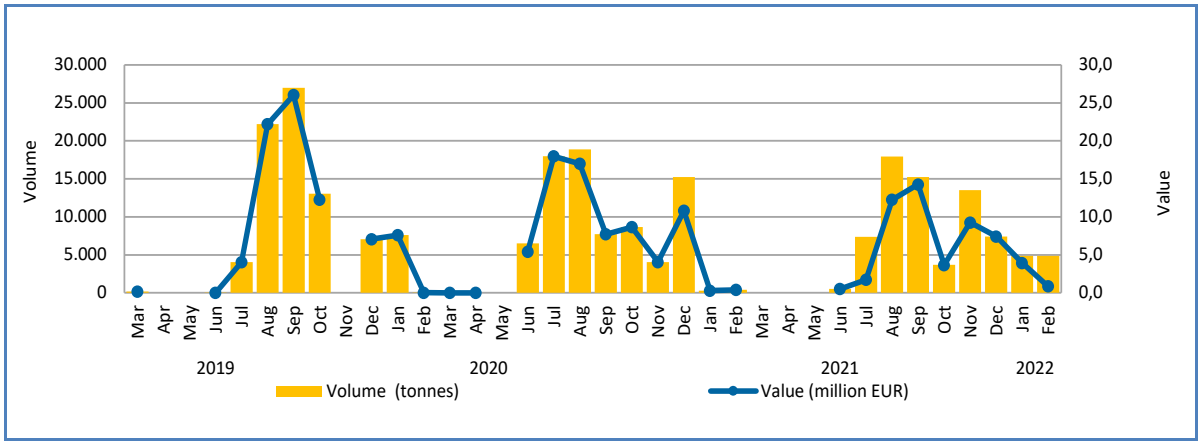


Figure 20. **ATLANTIC HERRING: FIRST SALES IN THE NETHERLANDS, MARCH 2019 – FEBRUARY 2022**



Over the past 36 months in **the Netherlands**, the highest first-sales of Atlantic herring were in September 2019 when 26.996 tonnes were sold. Most of the Dutch herring is fished from July to December. There were no fishing activities from March to May. Herring fishing by the Dutch fleet is most intense during the second half of the year when the fleet target the mature and spawning stock component. Herring spawning takes place in August-September, and then in December (mostly in the English Channel, where Dutch freezer-trawlers operate during this time).

[17] Council Regulation (EU) 2020/1579 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32020R1579

Figure 21. **FIRST SALES: COMPOSITION OF "SMALL PELAGICS" (ERS LEVEL) IN THE NETHERLANDS IN VALUE AND VOLUME, FEBRUARY 2022**

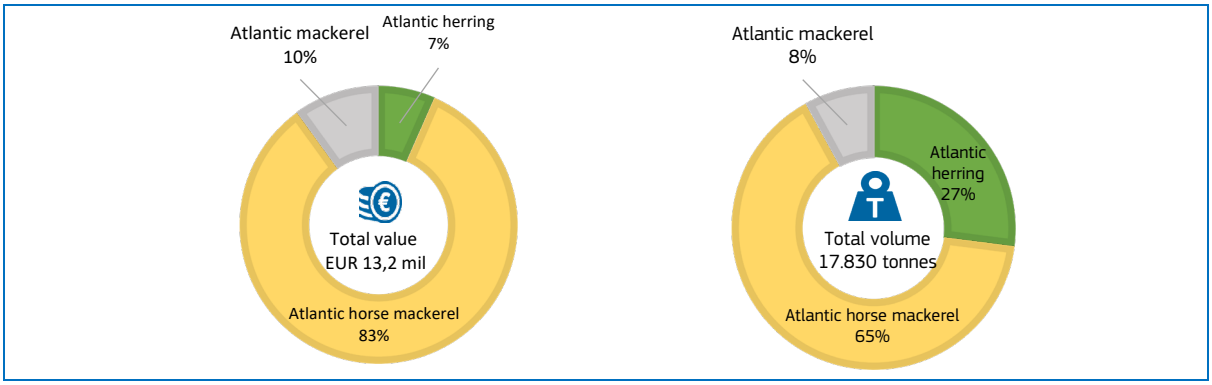
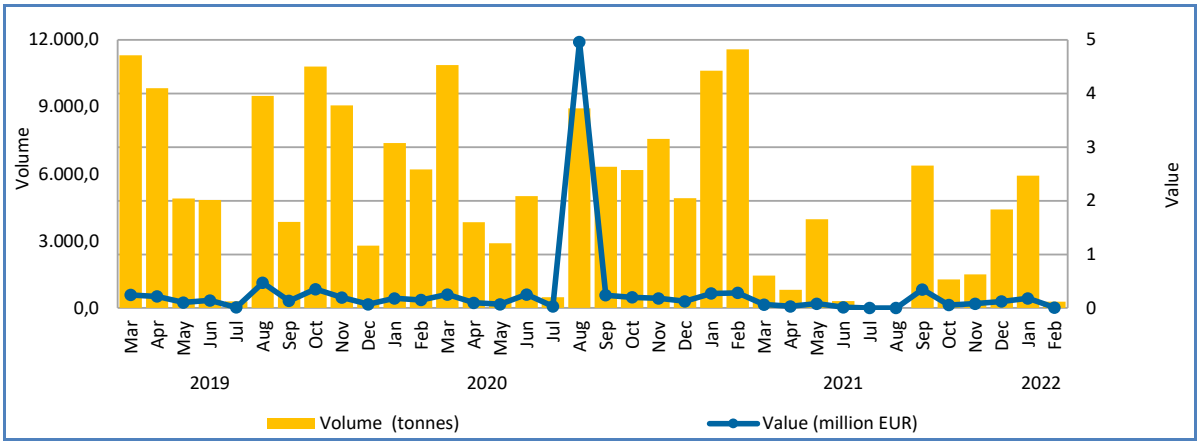
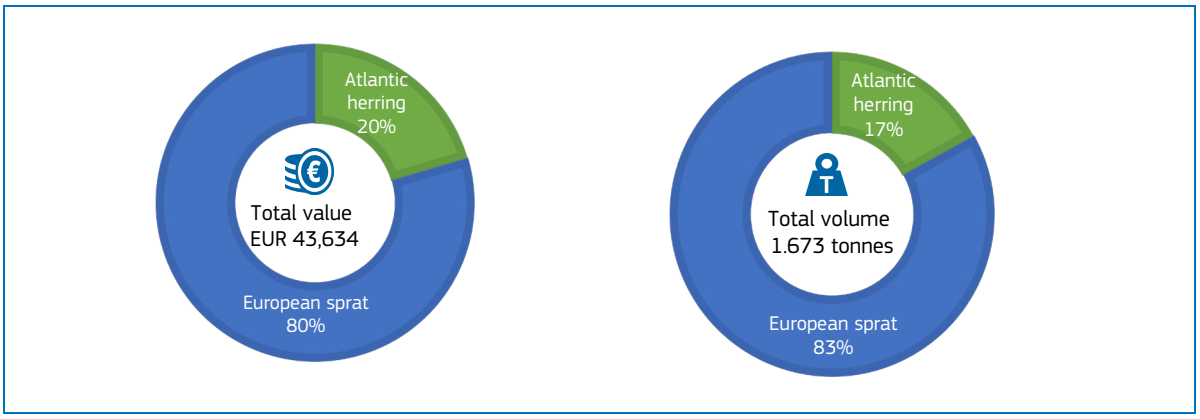


Figure 22. **ATLANTIC HERRING: FIRST SALES IN SWEDEN, MARCH 2018 - FEBRUARY 2022**



Over the past 36 months in **Sweden**, first sales fluctuated throughout each year depending on various factors including fisheries' seasonality, authorities' measures, and weather conditions. The highest first-sales volume of Atlantic herring occurred in February 2021 when 11.578 tonnes were sold. The lowest first-sales volume was recorded in July each year, with zero sales recorded in August 2021. The herring fishery in Sweden is managed in accordance with EU regulations[18].

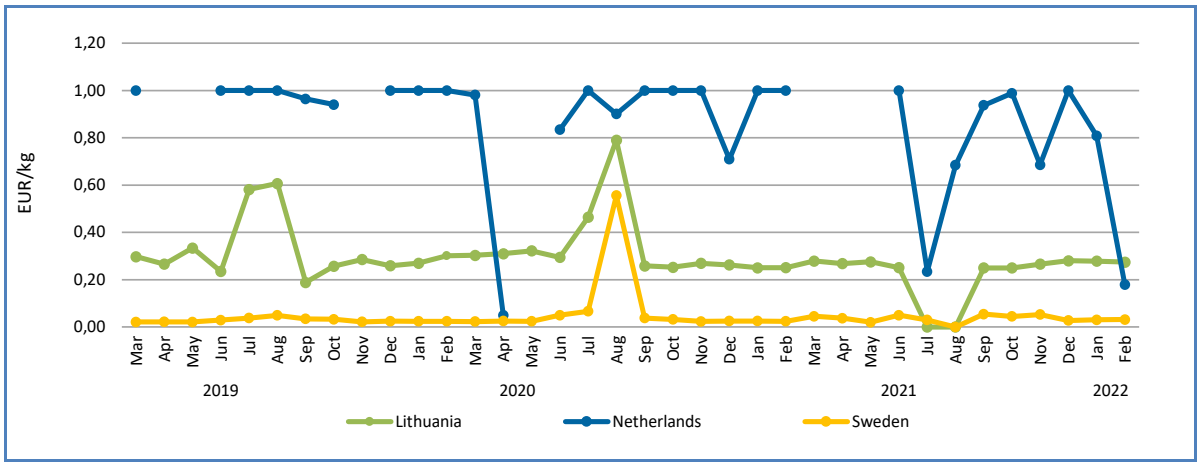
Figure 23. **FIRST SALES: COMPOSITION OF "SMALL PELAGICS" (ERS LEVEL) IN SWEDEN IN VALUE AND VOLUME, FEBRUARY 2022**



[18] Council Regulation (EU) 2021/1069 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32021R1069

Price trend

Figure 24. **ATLANTIC HERRING: FIRST-SALES PRICES IN SELECTED COUNTRIES, MARCH 2019 - FEBRUARY 2022**



Over the 36-month observation period (March 2019 to February 2022), the weighted average first-sales price of Atlantic herring in **the Netherlands** was 0,87 EUR/kg, 223% higher than in **Lithuania** (0,27 EUR/kg), and 1484% greater than in **Sweden** (0,05 EUR/kg). The main reason for the low first-sales price in Sweden is that herring is often destined for non-human consumption.

In **Lithuania,** in February 2022, the average first-sales price of Atlantic herring (0,27 EUR/kg) increased by 9% compared with February 2021 and decreased by 9% compared with February 2020. Over the past 36 months, average price ranged from 0,19 EUR/kg for 1,1 tonnes in September 2019, to 0,79 EUR/kg for 0,5 tonnes in August 2020.

In **the Netherlands,** in February 2022, the average first-sales price of Atlantic herring (0,18 EUR/kg) decreased by 82% compared to the same month of both 2021 and 2020. During the observed period, the lowest average price (0,05 EUR/kg for 4 kg) was seen in April 2020, while the highest average price (1,00 EUR/kg) was recorded in several different months. These high prices are controlled by internal sales and specific procedures within the company that owns the catching vessels.

In **Sweden,** in February 2022, the average first-sales price of Atlantic herring (0,03 EUR/kg) increased by 29% compared to February 2021 and February 2020. During the observed period, the average price ranged from 0,02 EUR/kg to 0,07 EUR/kg, with one high spike in August 2020 - when first sales reached 0,56 EUR/kg for 8.930 tonnes.

1.7. Focus on European anchovy

European anchovy (*Engraulis encrasicolus*) is a small short-lived pelagic species of the family Engraulidae. It can tolerate wide-ranging salinity levels (5-41 ppt), appearing in lagoons, estuaries and lakes during spawning. It is a migratory species that aggregates in schools, moving further north and into surface waters in summer, and retreating south and descending deeper in winter. It feeds on planktonic organisms.[19] European anchovy has a widespread distribution and can be found throughout the North Atlantic Ocean and the North Sea, and is also abundant in the Mediterranean, the Black Sea, and all around the coast of Africa. European anchovy is absent from the colder Nordic waters of Iceland and Finland, as well as from the Baltic Sea and the Barents Sea.[20] In European waters, anchovy are most commonly caught with purse seines, lampara (light-fishing), or midwater trawls (in winter).

Despite the commercial pressure on the species, the IUCN (International Union for the Conservation of Nature) still classifies the European anchovy as a species of Least Concern. In the EU, anchovy is subject to fishery-management measures, including fishing efforts, total allowable catches (TACs), fishery closures, and minimum size limits. Fishing in the Mediterranean takes place under the auspices of the GFCM and its multiannual management plans[21], a regional fisheries management organisation (RFMO) to which the EU is a contracting party.

The European anchovy is classified as an oily fish and has a strong, distinctly salty taste. They are often sold tinned in supermarkets, but are also available fresh from fishmongers, and in some countries they are eaten raw. Due to their strong flavour, they are often added to other dishes. Anchovies can be preserved by salting or storing in oil, thus they have been used for long-distance trade for many centuries.[22]

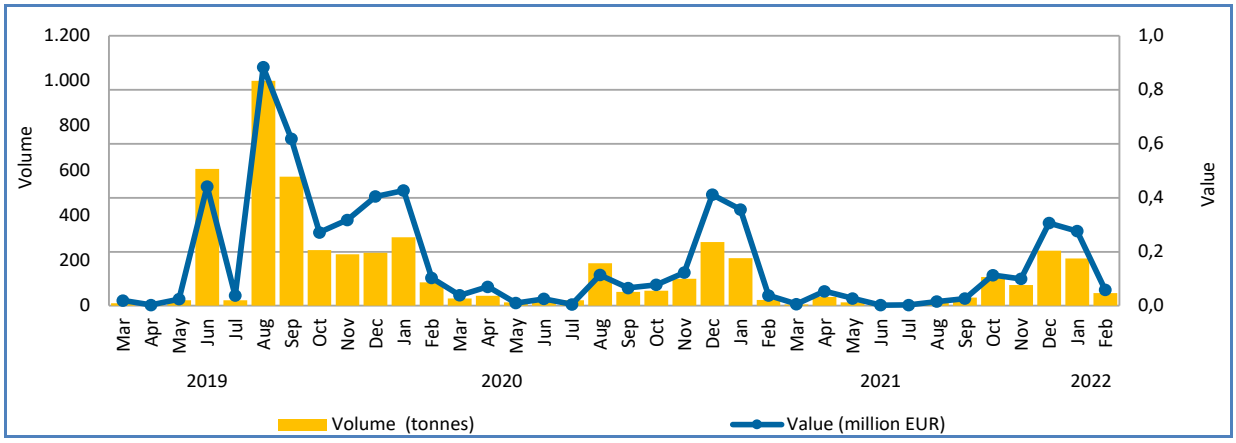
Selected countries

Table 19. **COMPARISON OF EUROPEAN ANCHOVY FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "SMALL PELAGICS" IN SELECTED COUNTRIES**

European anchovy		Changes in European anchovy first sales Jan-Feb 2022 (%)		Contribution of European anchovy to total "small pelagics" first sales in February 2022 (%)	Principal places of sales in Jan-Feb 2022 in terms of first-sales value
		Compared to Jan-Feb 2021	Compared to Jan-Feb 2020		
France	**Value**	-15%	-37%	3%	Le Grau-du-Roi, Port-la-Nouvelle, St Jean-de-Luz
	Volume	+12%	-35%	4%	
Italy	**Value**	-18%	+4%	79%	Porto Tolle, Sciacca, San Benedetto del Tronto.
	Volume	-14%	-19%	61%	
Spain	**Value**	-27%	-16%	40%	La Caleta de Vélez, Isla Cristina, Vilanova i la Geltrú.
	Volume	-7%	-12%	32%	

[19] https://www.fishbase.se/summary/engraulis-encrasicolus.html
[20] https://britishseafishing.co.uk/european-anchovy/
[21] https://www.fao.org/gfcm/managementplan-smallpelagic-adriatic/en/
[22] https://britishseafishing.co.uk/european-anchovy/

Figure 25. **EUROPEAN ANCHOVY: FIRST SALES IN FRANCE, MARCH 2019 – FEBRUARY 2022**



In **France**, over the observed 36-month period, the highest first sales volume of European anchovy occurred in August 2019 when 999 tonnes were sold. The lowest sales were observed in June and July 2021 when 3 tonnes were sold. In general, first sales experienced significant decreases throughout 2020 and 2021, with higher supplies only in the winter period.

Figure 26. **FIRST SALES: COMPOSITION OF "SMALL PELAGICS" (ERS LEVEL) IN FRANCE IN VALUE AND VOLUME, FEBRUARY 2022**

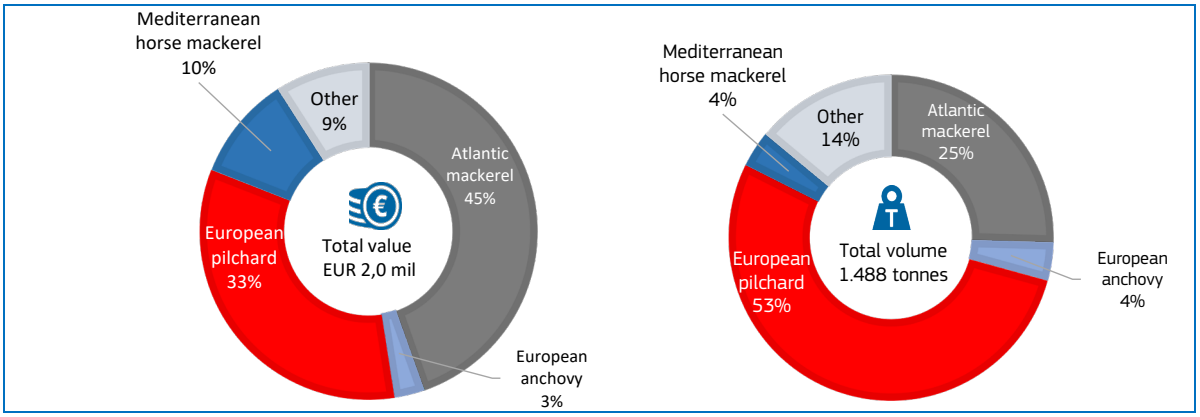
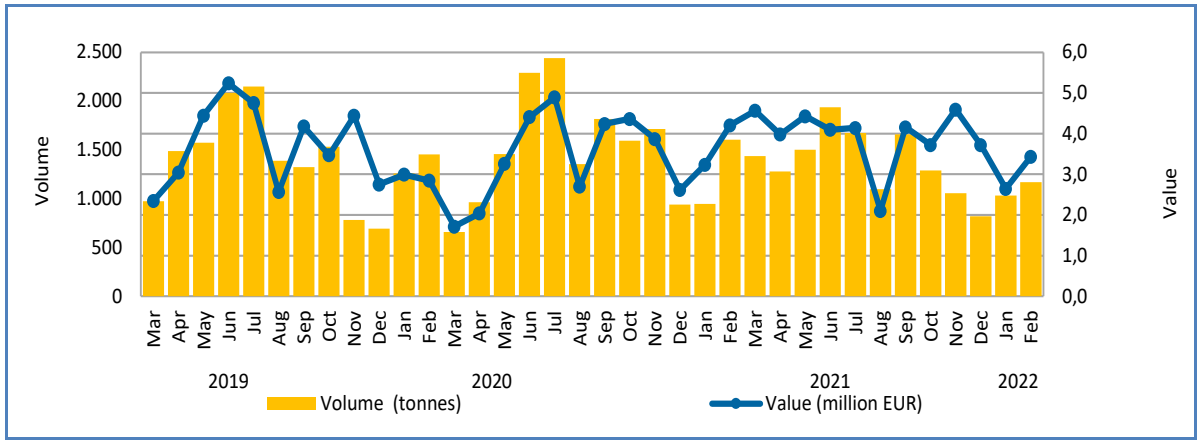


Figure 27. **EUROPEAN ANCHOVY: FIRST SALES IN ITALY, MARCH 2019 – FEBRUARY 2022**



In **Italy** over the past 36 months, first sales were the highest in June and July, reaching a peak in July 2020 when 2.440 tonnes were sold. In general, supply is lower during colder periods when weather conditions are not favourable for fishing activity. Anchovy is caught by Italian fishermen using two kinds of fishing techniques: mid-water pair trawls (*volante* in Italian) - mainly used in the northern and central Adriatic - and purse seining at night using lamps (*lampara* in Italian)[23].

Figure 28. **FIRST SALES: COMPOSITION OF "SMALL PELAGICS" (ERS LEVEL) IN ITALY IN VALUE AND VOLUME, FEBRUARY 2022**

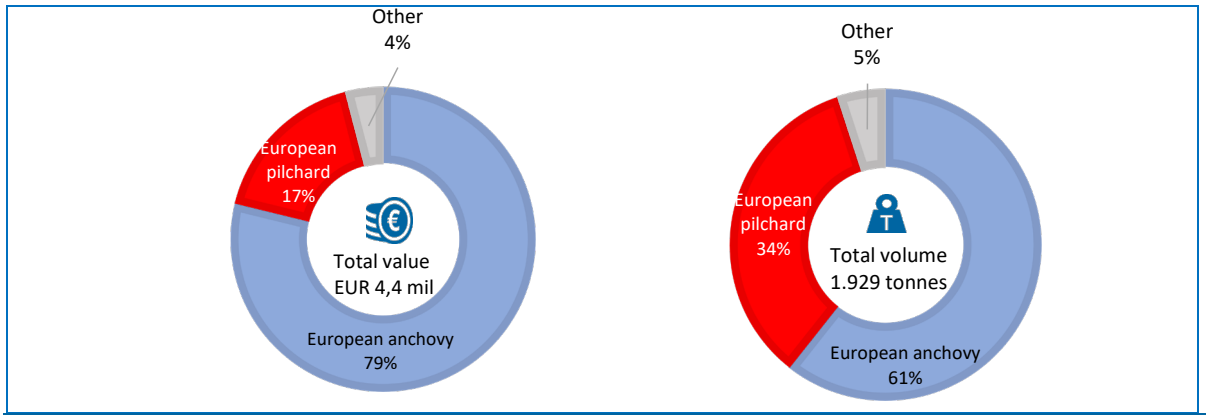
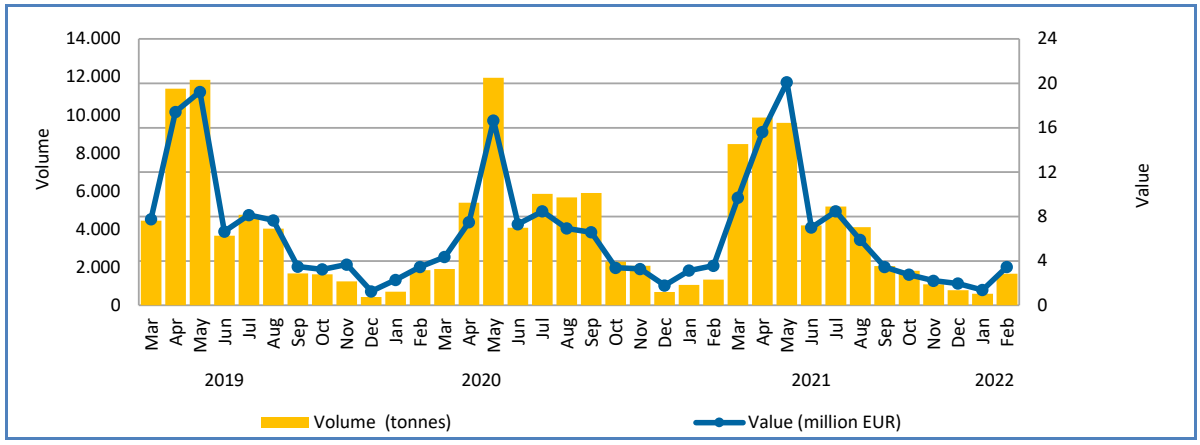


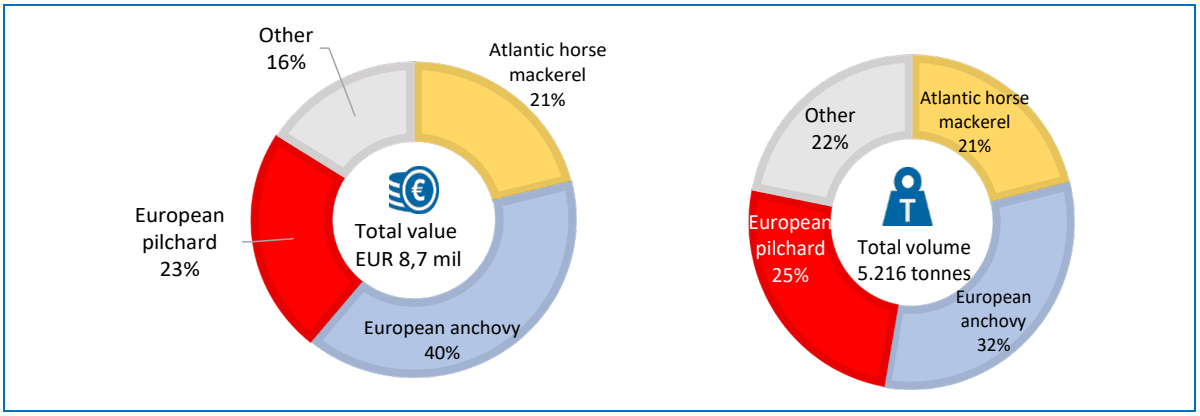
Figure 29. **EUROPEAN ANCHOVY: FIRST SALES IN SPAIN, MARCH 2019 - FEBRUARY 2022**



Among surveyed countries, **Spain** is the EU country with the largest catch of anchovy, and has an important processing and canning sector. Over the past 36 months, the highest first sales were registered in spring, peaking in May 2020, when 11.944 tonnes were sold. The main fishing seasons occur in March-May and July-September. The Spanish fisheries operate mainly with purse seiners in the Bay of Biscay (ICES Sub-area VIII) and with purse seiners and trawlers in Iberian Atlantic waters (ICES Division IXa)[24]

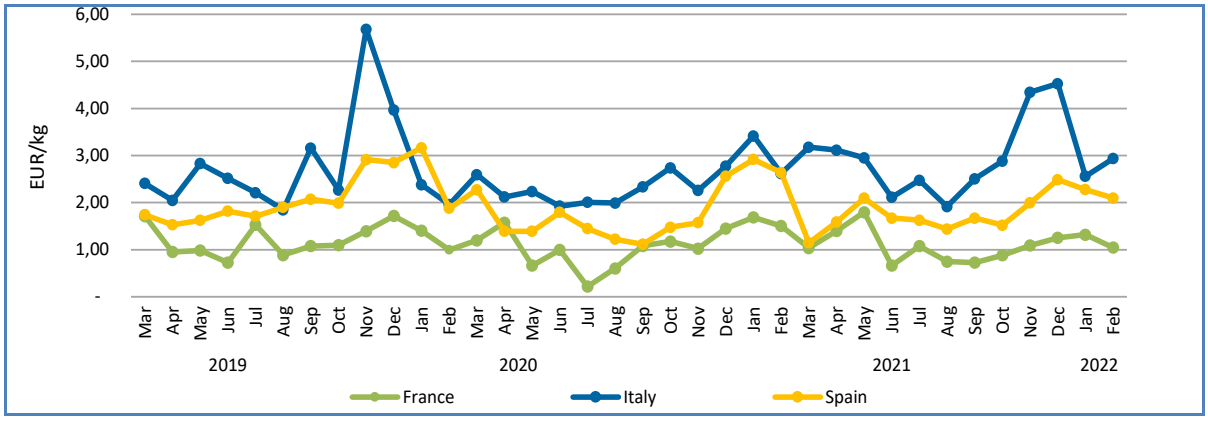
[23] https://www.researchgate.net/publication/242425588_Anchovy_fisheries_in_the_Adriatic_Sea
[24] Source: Current Politics & Economics of Europe, 2019, Vol. 30 Issue 2, p285-308. 24p. Fernández-González, Raquel; Pérez-Pérez, Marcos; Nobre, Ana Lemos; Garza-Gil, M. Dolores

Figure 30. **FIRST SALES: COMPOSITION OF "SMALL PELAGICS" (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, FEBRUARY 2022**



Price trend

Figure 31. **EUROPEAN ANCHOVY: FIRST-SALES PRICES IN SELECTED COUNTRIES, MARCH 2019 - FEBRUARY 2022**



Over the 36-month observation period (March 2019–February 2022), the weighted average first-sales price of European anchovy in **Italy** was 2,58 EUR/kg, 133% higher than that of **France** (1,11 EUR/kg), and 57% greater than that of **Spain** (1,64 EUR/kg). The higher price of anchovy observed in Italy is possibly due to the higher market demand of this species in Italian markets. The considerable difference observed between Italy and France (181%) is probably due to the poor condition of the anchovy stock in the Gulf of Lion[25].

In **France**, in February 2022, the average first-sales price of European anchovy (1,04 EUR/kg) decreased by 31% compared to February 2021 and increased by 5% compared to February 2020. The lowest average price was recorded in July 2020 at 0,22 EUR/kg for 24 tonnes, while the highest average price of 1,79 EUR/kg for 15 tonnes was recorded in May 2021.

In **Italy**, in February 2022, the average first-sales price of European anchovy was 2,94 EUR/kg, 12% and 50% higher than in February 2021 and 2020, respectively. The lowest price in the past 36 months was recorded in August 2019, at 1,85 EUR/kg for 1.388 tonnes. The highest price (5,68 EUR/kg for 781 tonnes) was recorded in November 2019.

In **Spain**, in February 2022, the average first-sales price of European anchovy was 2,10 EUR/kg, 20% lower than in February 2021 and 11% higher than in February 2020. The lowest average price was recorded in September 2020, at 1,12 EUR/kg for 5.907 tonnes. The highest average price of 3,17 EUR/kg for 725 tonnes was recorded in January 2020. In general, the average prices are highest in winter when supply is lower, but demand remains stable.

[25] GFCM-SAC, 2021. SCIENTIFIC ADVISORY COMMITTEE ON FISHERIES (SAC). Working Group on Stock Assessment of Small Pelagic species (WGSASP). 17–22 January 2022. (available at: https://gfcm.sharepoint.com/:b:/g/EG/EZWTjdMI9uBHtxFyPL231DcBNyTuAuRS2dhDApdFVFaxHA).

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 "small pelagics", and the featured species are frozen meat of herring from Norway, frozen Atlantic horse mackerel from Norway, and prepared or preserved sardines from Morocco. The three randomly selected species this month are frozen squid from India, frozen fillets of catfish from Vietnam, and frozen albacore or longfinned tunas for industrial manufacture of products from South Africa.

Data analysed in the section "Extra-EU imports" are extracted from EUMOFA, as collected from the European Commission[26].

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 14/2022	Preceding 4-week average	Week 14/2021	Notes
Fresh whole **Atlantic salmon** imported from **Norway** (*Salmo salar*, CN code 03021400)	**Price (EUR/kg)**	10,04	8,36 (+20%)	6,24 (+61%)	Since week 1 of 2022, prices have shown an upward trend, in line with the trend over the past three years. Prices ranged from 4,32 (week 44 of 2020) to 10,04 EUR/kg (week 14 of 2022), the highest observed in the past three years.
	Volume (tonnes)	10.114	11.673 (–13%)	12.398 (–18%)	Volumes ranged from 6.189 to 19.435 tonnes and have shown an upward trend over the past three years. Since week 1 of 2022 weekly volumes have shown a downward trend.
Frozen **Alaska pollock** fillets imported from **China** (*Theragra chalcogramma*, CN code 03047500)	**Price (EUR/kg)**	3,27	3,22 (+2%)	2,51 (+31%)	Over the past three years weekly prices have shown an upward trend, rising above 3,00 EUR/kg at the beginning of 2022. Prices ranged from 2,26 (week 52 of 2020) to 3,28 EUR/kg (week 13 of 2022).
	Volume (tonnes)	1.333	1.873 (–29%)	2.974 (–55%)	Weekly volumes have fluctuated from 345 to 5.433 tonnes over the past three years, overall following a downward trend, in line with the trend in 2022.
Frozen **tropical shrimp** imported from **Ecuador** (genus *Penaeus*, CN code 03061792)	**Price (EUR/kg)**	5,88	6,18 (–5%)	4,99 (+18%)	Weekly prices have shown a downward trend in 2022, whereas they remained stable over the past three years. Prices have ranged from 4,27 (week 38 of 2020) to 6,56 EUR/kg (week 49 of 2021).
	Volume (tonnes)	1.890	3.046 (–38%)	4.076 (–54%)	Volumes exhibited an upward trend in 2022, in line with the trend over the past three years. Weekly volumes have fluctuated from 713 to 4.925 tonnes.

[26] Last update: 20.4.2022

Figure 32. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY, 2019 - 2022**

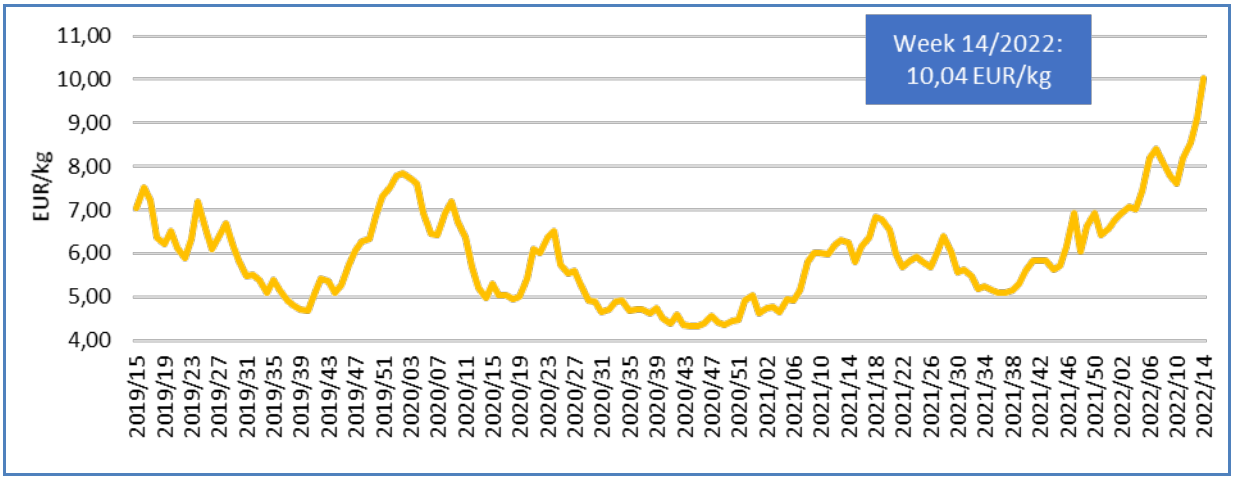


Figure 33. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2019 - 2022**

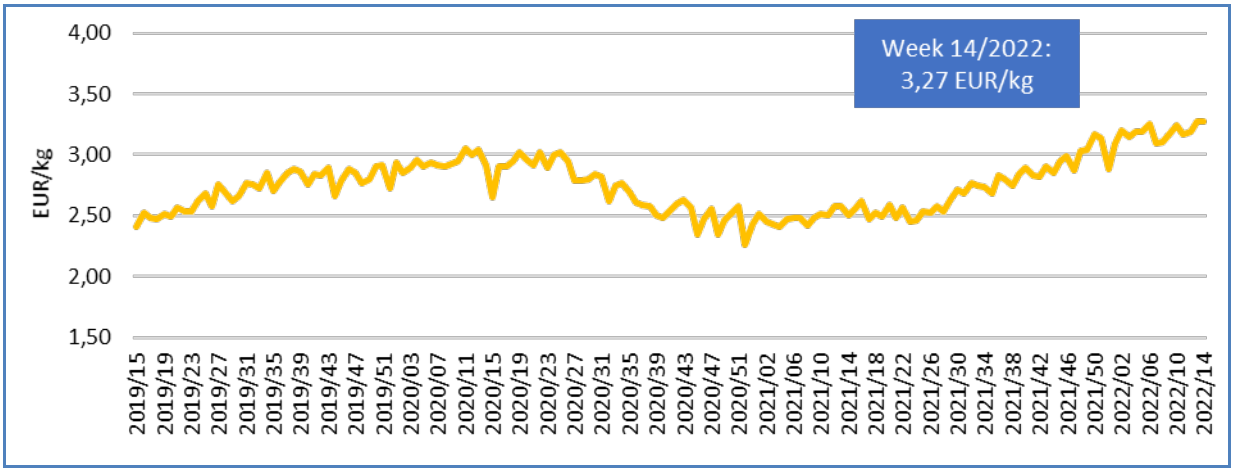


Figure 34. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2019 - 2022**

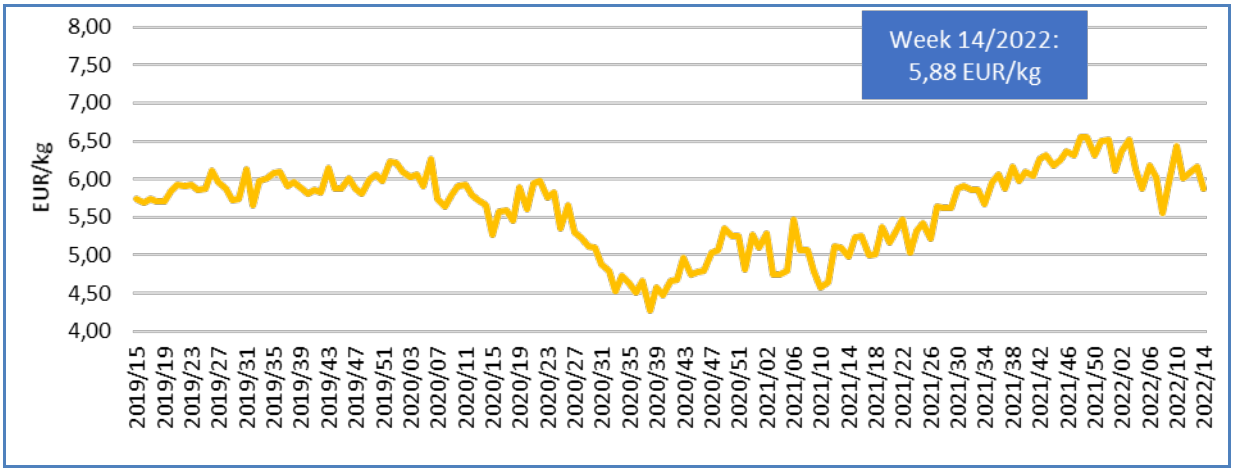
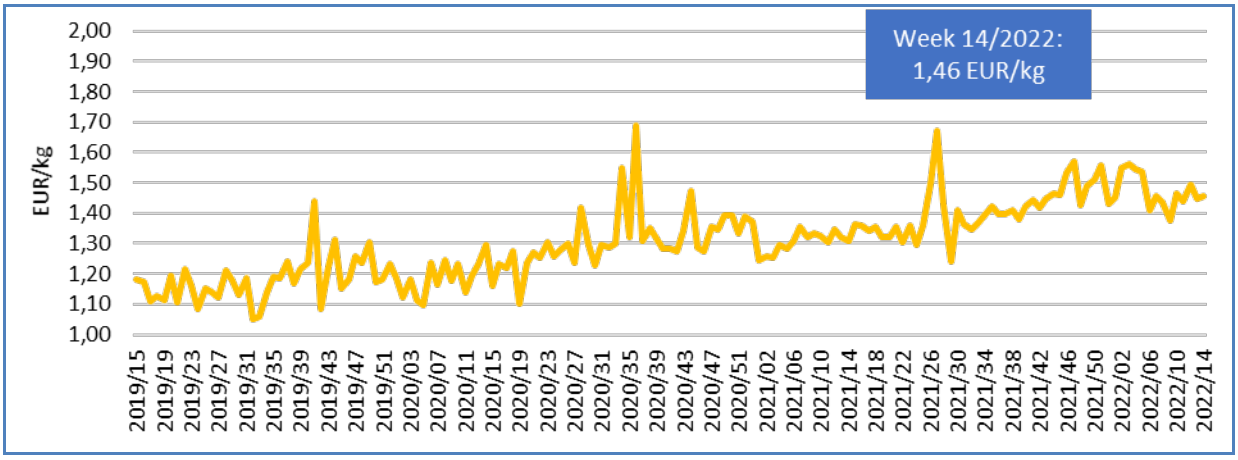


Table 21. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 14/2022	Preceding 4-week average	Week 14/2021	Notes
Frozen meat, minced and not-minced, of **herring** imported from **Norway** (*Clupea harengus, Clupea pallasii*, CN code 03049923)	**Price (EUR/kg)**	1,46	1,46 (0%)	1,31(+11%)	Upward trend over the past three years. Prices fluctuated from 1,05 (week 32 of 2019) to 1,69 EUR/kg (week 36 of 2020). Some price spikes correlated with a drop in supply from the previous week.
	Volume (tonnes)	440	806 (–45%)	691 (–36%)	Upward trend over the past three years. Dramatic fluctuations in supply from 20 (week 52 of 2019) to 3.016 tonnes (week 03 of 2021). 73% of the weekly supply was less than 1.000 tonnes.
Frozen **Atlantic horse mackerel** imported from **Norway**[27] (*Trachurus trachurus*, CN code 03035510)	**Price (EUR/kg)**	2,44*	2,21** (10%)	n/a[28]	Upward trend from 2019 to 2022. Prices fluctuated from 0,05 (week 13 of 2021) to 2,44 EUR/kg (week 11 of 2022).
	Volume (tonnes)	91*	88** (4%)	n/a[29]	Dramatic fluctuations in supply from 2019 to 2022, varying between 0,040 (week 10 of 2020) and 363 tonnes (week 05 of 2022). Overall upward trend.
Prepared or preserved **sardines**, whole or in pieces (excl. minced sardines and sardines in olive oil), imported from **Morocco** (CN code 16041319)	**Price (EUR/kg)**	3,12	3,78 (–17%)	3,40 (–8%)	Stable trend over the past three years. Prices ranged from 2,92 (week 18 of 2020) to 4,12 EUR/kg (week 12 of 2022). 29% of the weekly prices were less than 3,50 EUR/kg.
	Volume (tonnes)	348	447 (–22%)	573 (–39%)	Downward trend over the past three years. Fluctuations in supply from 219 (week 16 of 2019) to 1.014 tonnes (week 02 of 2021). 53% of the weekly volumes were over 500 tonnes.

**Data refers to week 11 of 2022 (the most recent available)*
*** Data refers to weeks 07-10 of 2022.*

Figure 35. **IMPORT PRICE OF FROZEN MEAT OF HERRING FROM NORWAY, 2019 - 2022**



[27] Trends are estimated on the available data (53%).
[28] There were no sales recorded for week 11 of 2021.
[29] Ibidem.

Figure 36. **IMPORT PRICE OF FROZEN ATLANTIC MACKEREL FROM NORWAY, 2019 - 2022**

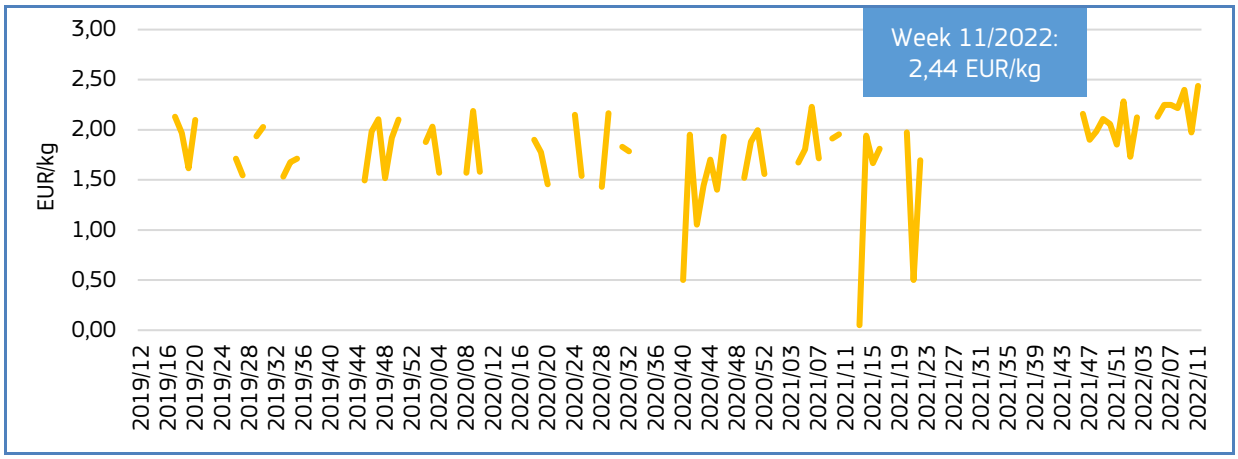
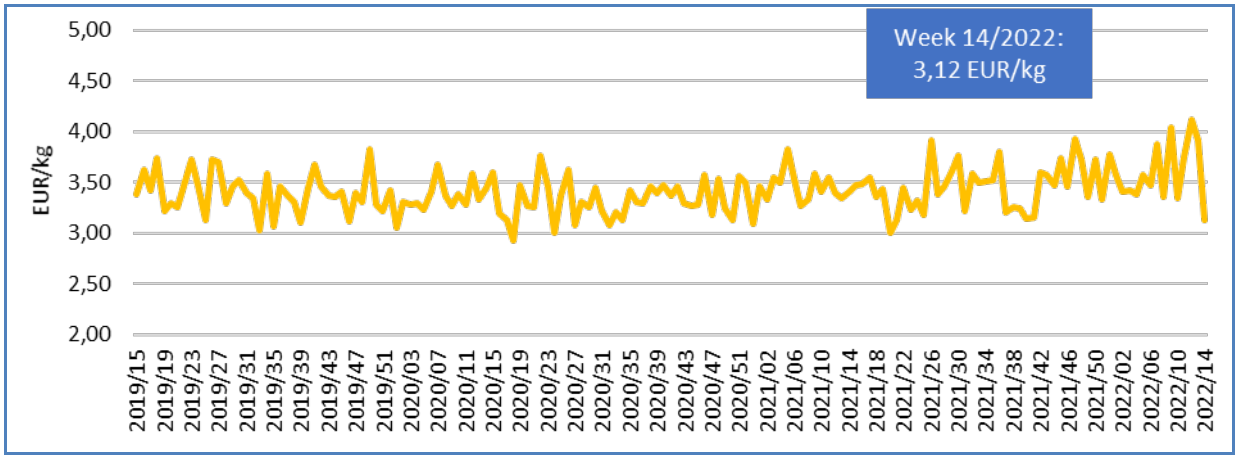


Figure 37. **IMPORT PRICE OF PREPARED OR PRESERVED SARDINES FROM MOROCCO, 2019 - 2022**



In 2022, the price of frozen meat of **herring** from **Norway** has exhibited a downward trend, while volume remained stable. Price ranged from 1,38 to 1,56 EUR/kg, and volume from 433 to 2.875 tonnes.

Since the beginning of 2022, price of frozen **Atlantic mackerel** from **Norway** has shown an upward trend. At the same time, volume showed the opposite. Price ranged from 1,73 to 2,44 EUR/kg, and supply from 40 kg to 363 tonnes.

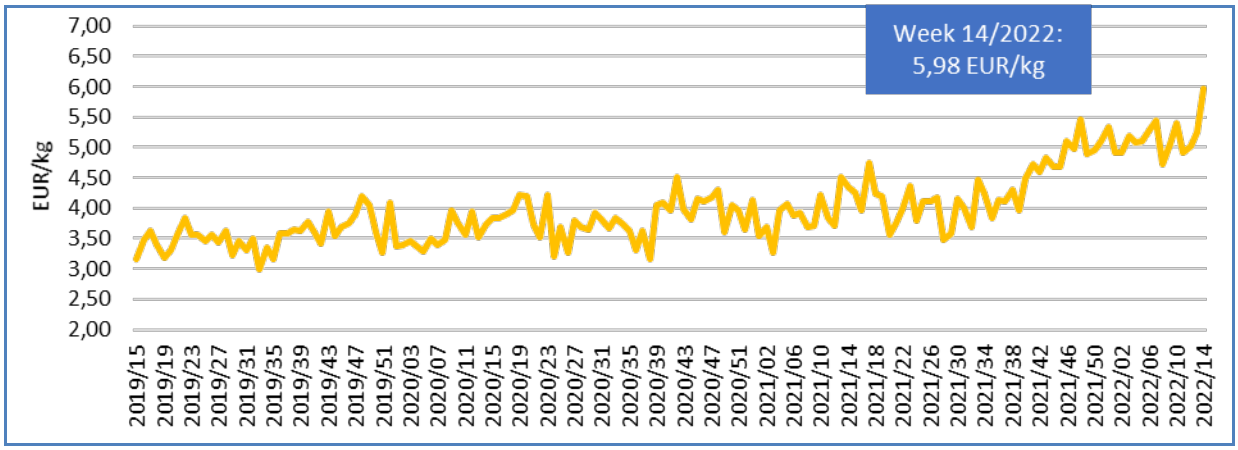
In 2022, price of prepared or preserved **sardines** from **Morocco** showed a stable trend. At the same time, volume showed a downward trend. Price ranged from 3,12 to 4,12 EUR/kg, and volume from 280 to 834 tonnes.

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 14/2022	Preceding 4-week average	Week 14/2021	Notes
Frozen **squid** imported from **India** (*Loligo* spp., CN code 03074338)	**Price (EUR/kg)**	5,98	5,14 (+16%)	4,34 (+38%)	Upward trend from 2019 to 2022. Prices fluctuated from 2,99 (week 33 of 2019) to 5,98 EUR/kg (week 14 of 2022). 61% of the weekly prices were less than 4,00 EUR/kg.
	Volume (tonnes)	623	688 (–9%)	445 (+40%)	Fluctuations in supply, varying from 134 (week 18 of 2020) to 1.273 tonnes (week 01 of 2022). Overall upward trend.
Frozen fillets of **catfish** imported from **Vietnam** (*Pangasius* spp., *Silurus* spp., *Clarias* spp., *Ictalurus* spp., CN code 03046200)	**Price (EUR/kg)**	3,07	2,86 (+7%)	1,99 (+54%)	Downward trend over the past three years. Prices fluctuated between 1,44 (week 44 of 2020) to 3,07 EUR/kg (week 14 of 2022). 75% of the weekly prices ranged from 2,00 to 2,90 EUR/kg.
	Volume (tonnes)	569	699 (–19%)	1.022 (–44%)	Downward trend over the past three years. Fluctuations in supply from 336 (week 45 of 2021) to 1.831 tonnes (week 18 of 2019).
Frozen **albacore** or **longfinned tunas** for industrial manufacture of products of 1604 imported from **South Africa**[30] (*Thunnus alalunga*, CN code 03034110)	**Price (EUR/kg)**	3,10*	3,10** (0%)	2,91*** (+6%)	Downward trend from 2019 to 2022. Prices ranged from 2,71 (week 16 of 2021) to 4,30 EUR/kg (week 22 of 2019). On average the weekly prices were around 3,00 EUR/kg.
	Volume (tonnes)	27*	27** (0%)	112***(–76%)	From 2019 to 2022, volumes fluctuated from 13 (week 43 of 2019) to 229 tonnes (week 10 of 2021). Overall downward trend.

**Data refers to week 13 of 2022 (the most recent available)*
*** Data refers to week 11 of 2022*
****Data refers to week 13 of 2021*

Figure 38. **IMPORT PRICE OF FROZEN SQUID FROM INDIA, 2019 - 2022**



[30] The majority of data is missing; trends are estimated on the available data (38%).

Figure 39. **IMPORT PRICE OF FROZEN FILLETS OF CATFISH FROM VIETNAM, 2019 - 2022**

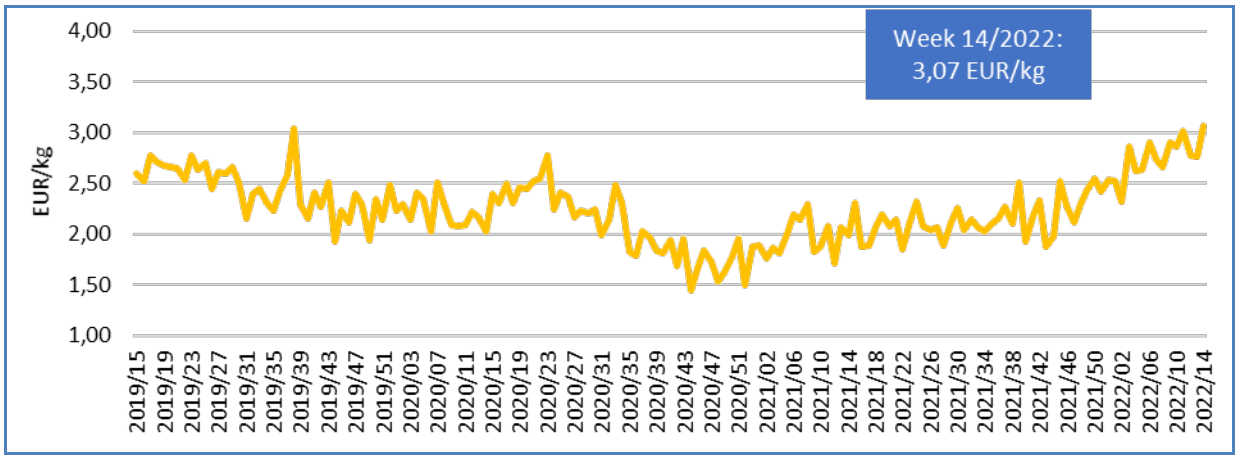
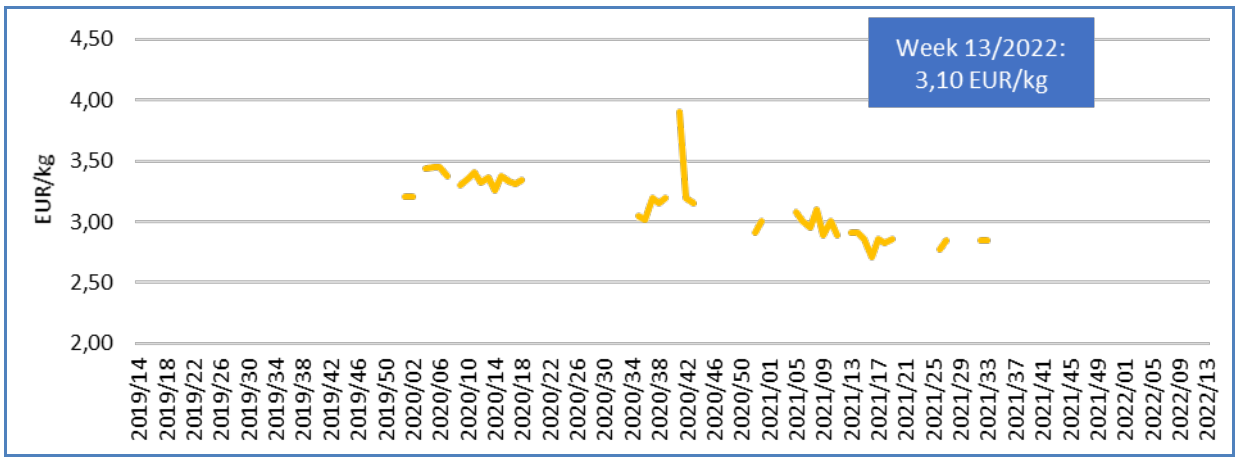


Figure 40. **IMPORT PRICE OF FROZEN ALBACORE OR LONGFINNED TUNAS FOR INDUSTRIAL MANUFACTURE OF PRODUCTS OF 1604 FROM SOUTH AFRICA, 2019 - 2022**



Price of frozen **squid** from **India** has exhibited a stable trend in 2022. At the same time volume has shown an upward trend. Price ranged from 4,73 to 5,98 EUR/kg and weekly supply ranged from 582 to 1.272 tonnes.

Since the beginning of the year, price of frozen **catfish** from **Vietnam** has shown an upward trend. At the same time, volume showed the opposite. Price ranged from 2,32 to 3,07 EUR/kg and supply ranged from 433 to 1.311 tonnes.

In 2022, price of frozen **albacore** or **longfinned tunas** for industrial manufacture of products of 1604 from **South Africa** exhibited an upward trend, while volume showed a stable trend. Price ranged from 3,06 to 3,10 EUR/kg and supply from 24 to 79 tonnes.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

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

In February 2022 compared with February 2021, household consumption of fresh fisheries and aquaculture products decreased in both volume and value in most of the Member States analysed. Only in Ireland did volume decrease while value increased. In the Netherlands, volume decreased, while value remained stable.

The value increase in Ireland was mainly due to shrimps and mackerel (31% and 20%, respectively). Mussels *Mytilys* spp. (-22%) and herring (-19%) were the main contributors to the observed decrease. In Portugal, European seabass (-62% in volume, -56% in value) and gilthead seabream (-27% in volume, -26% in value) were the main contributors to the observed decrease. In Sweden, cod (-45% in volume and -48% in value) and salmon (-33% in volume and -35% in value) contributed most to the decrease. Salmon was also one of the main contributors to the decrease in Poland (-23% in volume and -13% value).

Table 23. **FEBRUARY 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	February 2020		February 2021		January 2021		February 2022		Change from February 2021 to February 2022	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	42,56	1 019	17,81	1 194	21,28	1.139	18,66	996	16,93	-17%	-20%
France	33, 26	16 675	206,62	17 681	217,74	14.686	188,76	15 442	199,67	-13%	-8%
Germany	13,08	6 268	98,63	7 617	107,10	6.465	93,33	6 165	95,06	-19%	-11%
Hungary	6,28	482	3,05	573	2,86	270	1,90	319	2,34	-44%	-18%
Ireland	25,50	897	13,67	1 431	16,04	957	15,17	1 087	16,79	-24%	+5%
Italy	31,21	22 978	246,42	27 150	291,04	25.014	283,66	22 473	252,25	-17%	-13%
Netherlands	20,60	2 518	40,19	2 817	45,64	2.705	46,26	2 588	45,84	-8%	0%
Poland	13,11	3 904	25,80	4 453	29,45	3.449	26,60	3 566	25,95	-20%	-12%
Portugal	59,91	5 842	40,08	6 719	48,36	5.348	38,56	4 413	32,72	-34%	-32%
Spain	46,02	47 722	388,85	52 307	454,94	42.530	392,53	41 208	370,99	-21%	-18%
Sweden	25,16	859	11,94	914	11,79	621	8,87	627	8,10	-31%	-31%

**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/*

[31] Last update: 16.4.2022

Over the past three years, the average household consumption of fresh fisheries and aquaculture products in February has been below the annual average in both volume and value terms in most of the Member States analysed. Only in Germany was it above the annual average in both volume and value. In Ireland, even though the average value for February was below the yearly average household consumption, there was still an observed increase in volume. In Denmark and Poland, value was above the yearly average, however, volume was below.

The most recent weekly consumption data (up to **week 21 of 2022**) are available on the EUMOFA website and can be accessed **here**.

3.2. Fresh whiting

Habitat: A demersal, temperate species with a white, firm and delicate flesh found in coastal waters at a depth range of 10-200 m[32].
Catch area: North Atlantic, North Sea, extends to the Mediterranean and the Black Sea.
Catching countries in the EU: France, Ireland, Denmark, the Netherlands.
Production method: Caught.
Main consumers in the EU: France, Ireland.
Presentation: Whole, fillets.
Preservation: Fresh, chilled, frozen, dried, salted, smoked.

3.2.1. Overview of household consumption in France

France is an EU Member State where the per capita apparent consumption[33] of fisheries and aquaculture products is among the highest in the EU. In 2019, the per capita apparent consumption of fisheries and aquaculture products was 33,26 kg. It had slightly decreased (by 0,5%) compared to the previous year. Compared to the EU average, it was 39% higher. However, compared to Portugal – the Member State with the highest per capita consumption in the EU – it was 44% lower.

Over the past three years (March 2019 – February 2022), the monthly average French household consumption of whiting was 340 tonnes. French consumers spent on average 16,86 EUR for a kilogram of whiting.

Whiting is among the top ten main commercial species within the groundfish commodity group. In France in 2021, both volume and value of total household consumption of fresh whiting increased by 7% and 8% respectively, compared to the previous year. The average price also showed an increase of 2%.

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

First Sales: France 10/2018, 4/2016, 3/2013; Italy 10/2018; the Netherlands 6/2019; Portugal 6/2019; the UK 6/2019, 10/2018, 6/2015.

Consumption: France 7/2017.

Topic of the month: First sales of whiting in major places of sale 9/2019.

[32] https://www.fishbase.se/summary/Merlangius-merlangus.html
[33] "Apparent consumption" is calculated by using the supply balance sheet that provides an estimate of the supply of fisheries and aquaculture products available for human consumption at 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 additionally requiring the adjustment of abnormal trends due to the higher impact of stock changes.

Figure 41. **PRICES OF FRESH WHITING PURCHASED BY FRENCH HOUSEHOLDS**

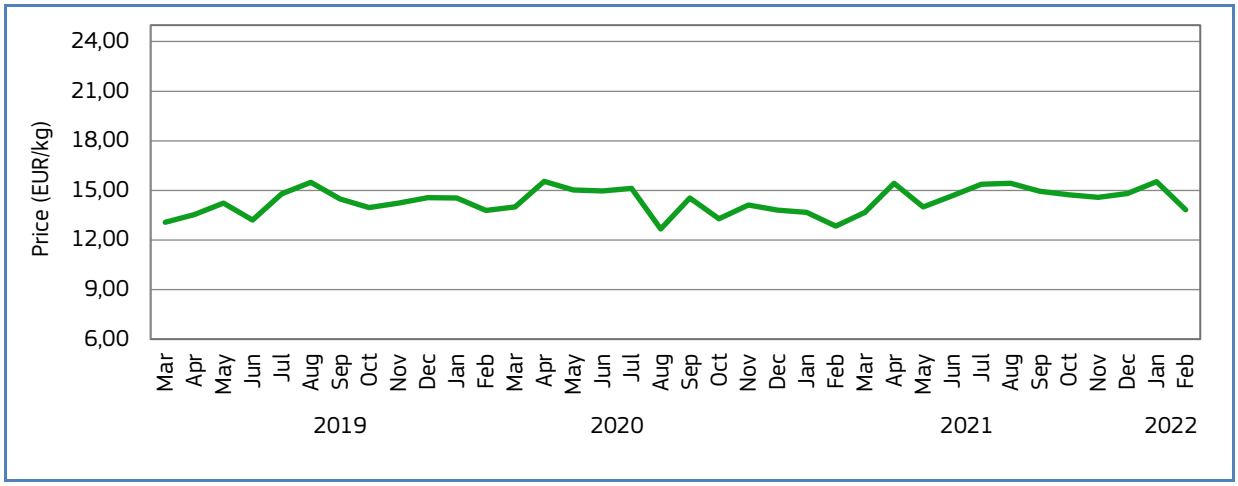
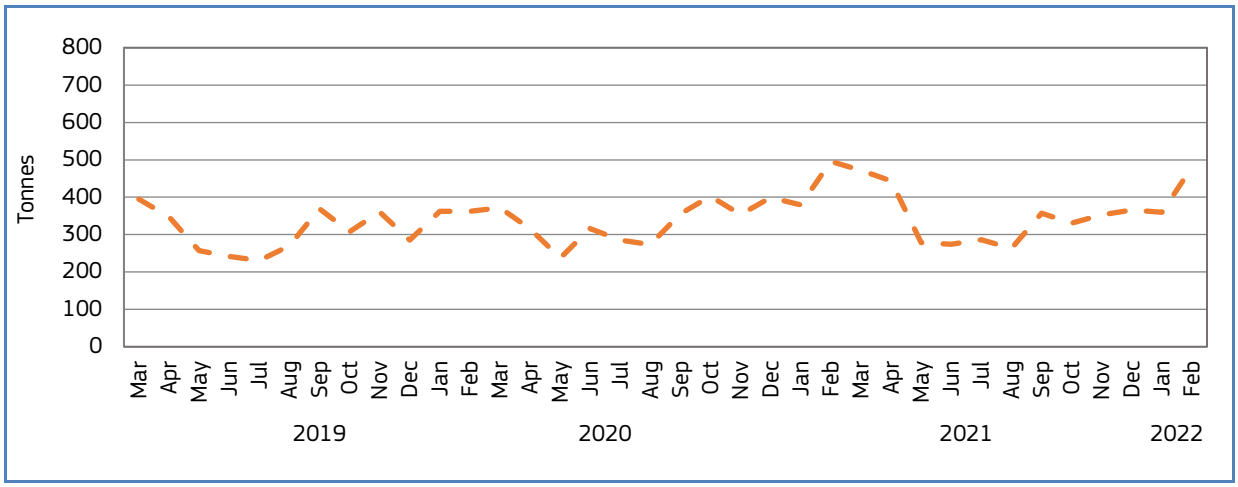


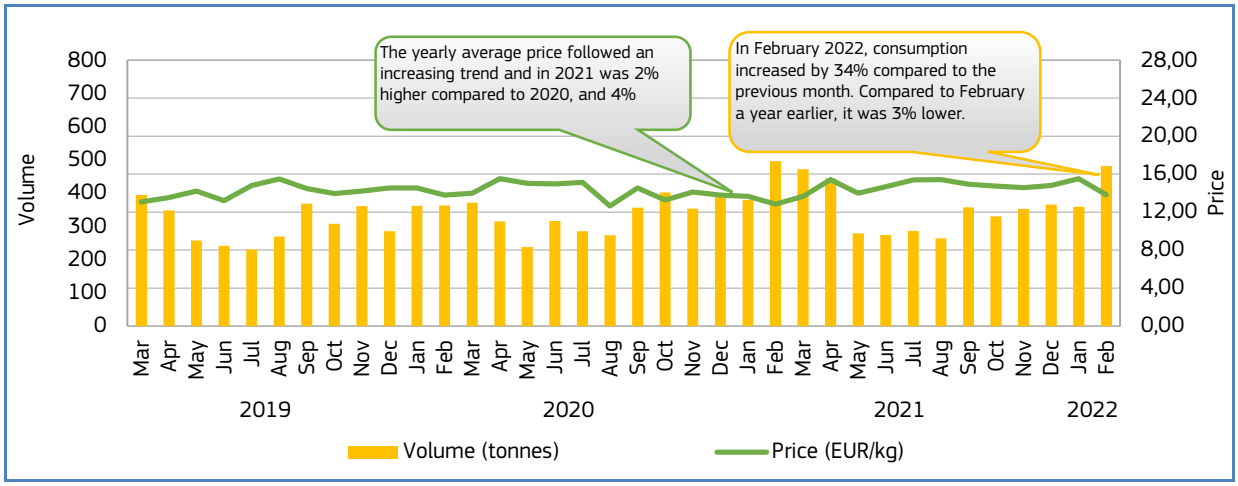
Figure 42. **VOLUME OF FRESH WHITING PURCHASED BY FRENCH HOUSEHOLDS**



3.2.2. Household consumption trends in France

Long-term trend (March 2019 to February 2022): Upward trend in both price and volume.
Yearly average price: 13,92 EUR/kg (2019), 14,28 EUR/kg (2020), 14,51 EUR/kg (2021).
Yearly consumption: 3.983 tonnes (2019), 4.035 tonnes (2020), 4.299 tonnes (2021).
Short-term trend (January to February 2022): Downward trend in price and upward trend in volume.
Price: 14,68 EUR/kg (2022).
Consumption: 841 tonnes (2022).

Figure 43. **RETAIL PRICE AND VOLUME OF FRESH WHITING PURCHASED BY HOUSEHOLDS IN FRANCE, MARCH 2019 – FEBRUARY 2022**



4. Case study – EU Trade in 2021

EU trade statistics for 2021 are available as of the second quarter of 2022. Analyses were preceded with thorough data processing and harmonisation before publishing in this issue of Monthly Highlights.

The COVID-19 pandemic and associated restrictions (closure of the hospitality sector, reduced fish production, travel, and disrupted logistics) strongly affected global trade in fishery and aquaculture products, and the seafood processing industry. While the seafood market impact of the pandemic has been significant since early 2020, producer operations and trade flows in the EU have also been heavily affected, with signs of recovery in 2021. Continued positive EU trade trends in 2022 are hard to predict due to uncertainties that continue to dominate the outlook for the fishery and aquaculture sector, particularly regarding the duration and severity of the pandemic, rising inflation, and the Russian war of aggression against Ukraine.

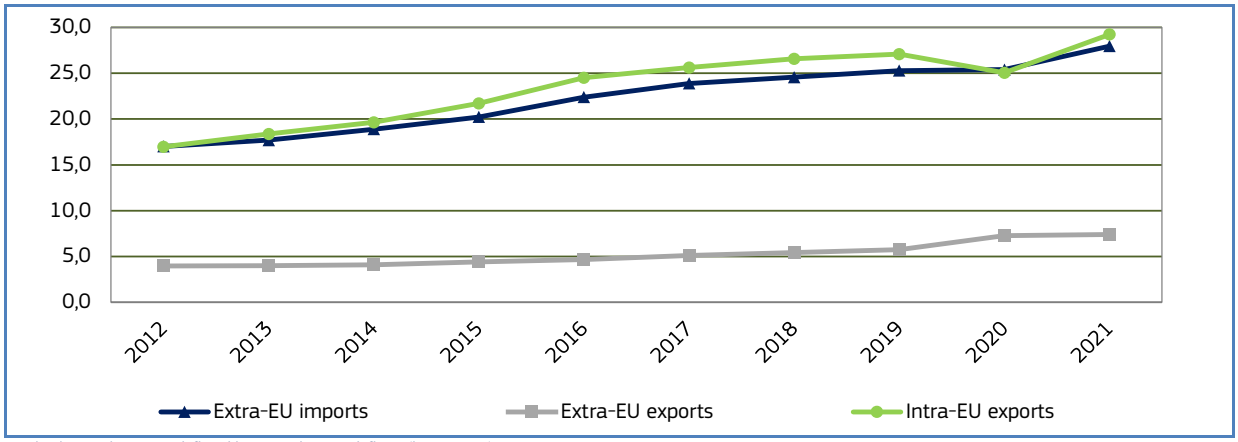
4.1 Trade flow trends

Trade plays a major role in the EU[34], as one of the world's largest import markets for fishery and aquaculture products. Since EU demand for fishery and aquaculture products far exceeds the domestic supply, imports are a key component of trade. The EU imports a large share of its seafood needs from third countries. In 2021, imports from third countries accounted for 44% of the value of all fishery and aquaculture products traded. While small relative to imports, EU exports consist of a wide variety of products, including non-food use (e.g. fish oil and fishmeal). In 2021, extra-EU exports of the non-food use commodity group accounted for 11% of the total EU exports of FAPs to third countries, and it reached EUR 745 million. Fish oil and fishmeal accounted for 78% of the total export value of the non-food use group: EUR 294 million (fish oil), and EUR 288 million (fishmeal). Exchanges within the Union (intra-EU exports) are very active: in 2021 they accounted for 45% of total EU trade of FAPs. Fishery and aquaculture products remain among the most traded food commodities worldwide. It is projected that in 2030, fishery and aquaculture production will represent 35% of the total food commodities traded. The EU will remain a leading importer, together with the United States, China, and Japan[35].

In 2021, EU imports from third countries (extra-EU imports) increased in both volume (+0,4%) and value (+5,4%) compared with 2020, reaching 6,23 million tonnes, valued at EUR 25,82 billion. During the same period, extra-EU exports were 2,41 million tonnes (-6,7%), reaching EUR 6,17 billion in real terms[36] (-4,1%). For the same period, intra-EU exports[37] followed the same trend as the extra-EU imports, since they consist mostly of northern Member States (e.g. Denmark, Sweden), exporting products originating from Norway and Iceland – mainly salmon and cod – to other EU countries. In 2021, intra-EU exports increased in both volume (+6,3%) and value (+14,6%), totalling 6,00 million tonnes, valued at EUR 26,75 billion.[38] Data analysed in this section are extracted from EUMOFA, as collected from the European Commission[39].

[34] In line with Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU (31st Jan 2020), and since the most recent reference period is 2021, the UK is excluded from the EU aggregations of each year. This means that the UK is dealt with as an extra-EU country of origin/destination of EU-27 imports and exports.
[35] The OECD-FAO Agricultural Outlook 2021-2030, page 198.
[36] Value in real terms in used for 10-years trends.
[37] Intra-EU trade flows encompass all transactions declared by Member States of the European Union (EU) with one another. For the analysis of intra-EU trade, only export flows have been considered. The source used for these trade flows is EUROSTAT - COMEXT. In general, bilateral comparisons between Member States of intra-EU flows reveal major and persistent discrepancies, thus comparisons dealing with intra-EU trade statistics and related results must be treated with caution and should consider these discrepancies. This is the official explanation from Eurostat: considering that the intra-EU trade data are based on common and largely harmonised rules, one might expect the intra-EU trade balance to be zero or at least close to it. However, it is worth underlining first of all that a perfect match is made impossible by the CIF/FOB approach: the import value should be higher than the mirror export value as it includes extra transport costs. A close match could nevertheless be legitimately expected given that trading partners within the EU are often neighbouring countries, but deliveries to vessels and aircraft are another methodological reason preventing this: such movements of goods create asymmetries in intra-EU ITGS as specific legal provisions state that only dispatches are to be reported. At a global level, most methodological reasons for asymmetries disappear. The remaining issues are in data reporting (e.g. missing Intrastat declarations, and trade in specific goods such as sea-going vessels and aircraft not being properly captured).
[38] Value variations for periods longer than 5 years are analysed by deflating values using the GDP deflator (base =2015). This approach applies to figures 41, 42, and 45. In the rest of the study, the nominal value and price are used.
[39] Last update 22.04.2022.

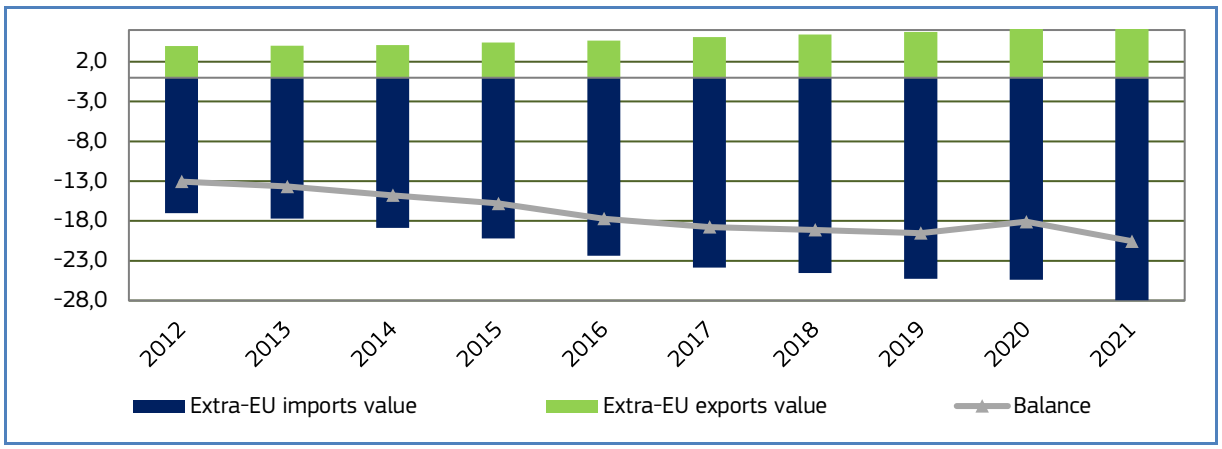
Figure 44. **EU TRADE FLOW (value in billion EUR)***



Real values: values were deflated by using the GDP deflator (base=2015).

The EU trade balance in fishery and aquaculture products continues to be negative, confirming the EU's dependence on imports. In 2021, the fishery and aquaculture trade deficit reached EUR −19,69 billion, the highest in the past ten years, and up by 9,3% from the previous year. Measured in volume terms, the trade deficit was −3,82 million tonnes, up by 5,4% from 2020.

Figure 45. **EXTRA-EU TRADE BALANCE (value in billion EUR)***



Real values: values are deflated by using the GDP deflator (base=2015).

EXTRA–EU IMPORTS: In 2021, imports from third countries went up in both volume (6,2 million tonnes, +0,4%) and value (EUR 25,82 billion, +5,4%), from 2020. In 2021, salmonids (EUR 6,7 billion), crustaceans (EUR 4,8 billion), groundfish (EUR 4,1 billion), and cephalopods (EUR 2,6 billion), were the most imported commodity groups, representing 70% of total extra-EU import value. Crustaceans (up by EUR 686 million, +17%), cephalopods (up by EUR 616 million, +31%), and salmonids (up by EUR 502 million, +8%) were the main contributors to the overall increase in the extra-EU import value. Miscellaneous shrimps (up by EUR 205 million, +14%) and warmwater shrimps (up by EUR 267 million, +15%) caused most of the increase in crustaceans' imports, (representing 77% of the value). The main reason behind the increase of salmonids commodity group was salmon (+EUR 557 million, +9%,), which accounted for 98% of the value of salmonids' imports. Octopus (up by EUR 424 million, +77%) and squid (up by EUR 184 million, +21%) caused most of the increase in cephalopods' imports (representing 78% of the value). Tuna and tuna-like species experienced the largest drop in value (down by EUR 215 million, −8%); skipjack tuna (down by EUR 146 million, −11%) and swordfish (down by EUR 2,58 billion, −96%), which represent 78% of the value of this commodity group, caused most of the decrease. Significant increases in volume were observed for crustaceans (up by 67.300 tonnes, +11%), mainly due to warmwater shrimp (up by 33.200 tonnes, +11%), and miscellaneous shrimp (26.100 tonnes, +13%), and for cephalopods (up by 60.200 tonnes, +13%), due to octopus (up by 19.900 tonnes, +23%), and squid (up by 34.500, +18%).

As noted, the EU imports fishery and aquaculture products from many countries around the world. However, of the EUR 25,82 billion total import value in 2021, 54% (EUR 13,91 billion) originated from only six countries (those whose exports were greater than EUR 1 billion).

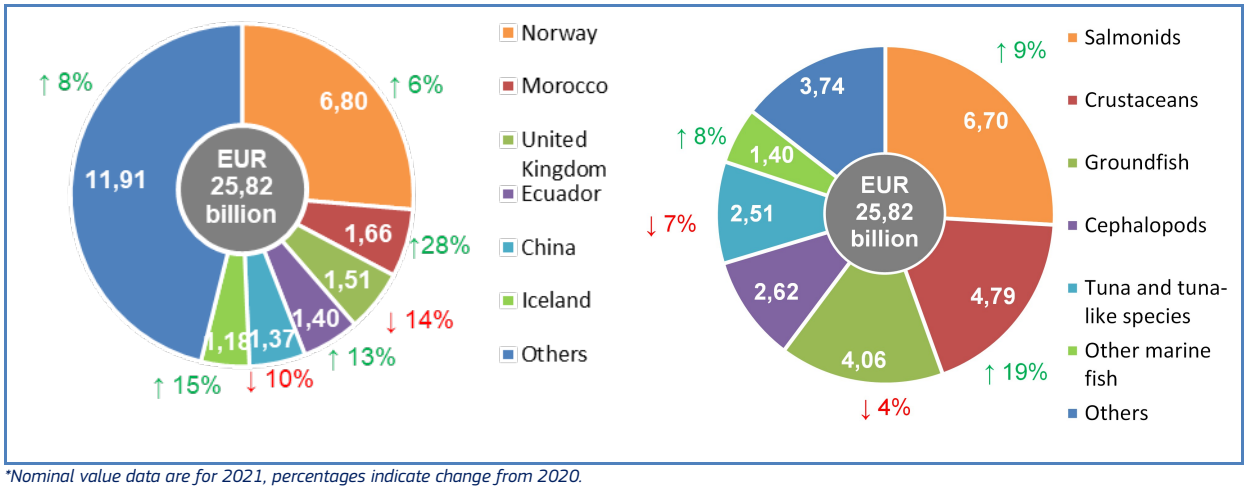
The main suppliers in terms of value were:

- Norway (EUR 6,80 billion, + 6% from 2020, mostly salmon).
- Morocco (EUR 1,66 billion, +28% from 2020, mostly octopus).
- United Kingdom (EUR 1,51 billion, −14% from 2020, mostly salmon and Norway lobster).
- Ecuador (EUR 1, 40 billion, +13% from 2020, mostly warmwater shrimp and skipjack tuna).
- China (EUR 1,37 billion, −10% from 2020, mostly Alaska pollock and cod).
- Iceland (EUR 1,18 billion, +15% from 2020, mostly cod and salmon).

Other countries which contributed to the increase in the EU's imports from 2020 were:

- Vietnam (EUR 828 million, +4%).
- Argentina (EUR 757 million, +39%).
- India (EUR 754 million, +24%).
- Russian Federation (EUR 612 million, +5%).
- Turkey (EUR 559 million, +9%).
- Faroe Islands (EUR 519 million, +26%).

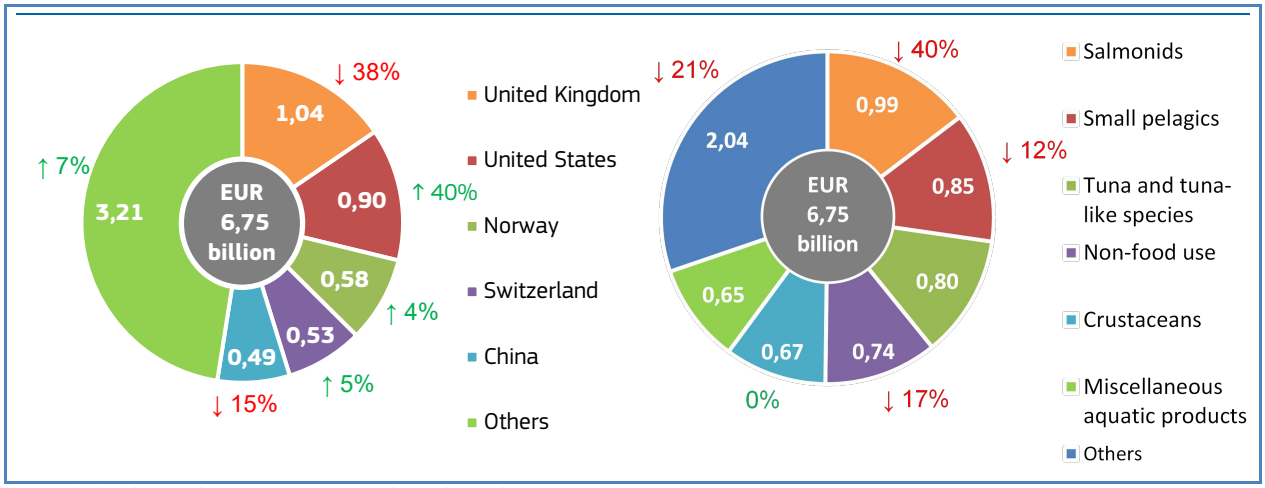
Figure 46. **EXTRA–EU IMPORTS: MAIN PARTNERS AND MAIN COMMODITY GROUPS IN 2021 (VALUE IN BILLION EUR)***



Nominal value data are for 2021, percentages indicate change from 2020.

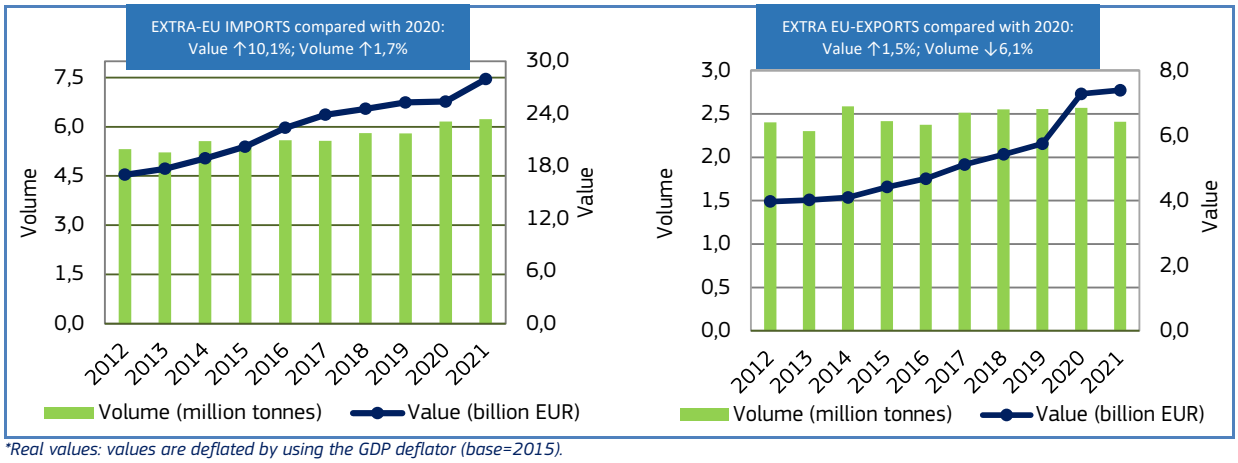
EXTRA–EU EXPORTS: Salmonids (accounting for 15% of total extra-EU export value) was the commodity group that experienced the largest decrease in 2021, reaching EUR 989 million (−19% from 2020). Other commodity groups which contributed to the decrease were groundfish (EUR 385 million, −13%), bivalves and other molluscs and aquatic invertebrates (EUR 179 million, −42%), other marine fish (EUR 593 million, −9%), and small pelagics (EUR 854 million, −6%). The volume drop was driven mainly by salmonids, as well as small pelagics, tuna and tuna-like species, groundfish, and other marine fish. Of the approximate 190 countries to which extra-EU exports were destined in 2021, five markets accounted for more than half of the total export value of EUR 3,5 billion (52%). The United Kingdom was the largest EU export market, mostly for other marine fish (EUR 165 million), and non-food use (EUR 138 million). Exports to China (the fifth largest market), decreased by 15%, reaching EUR 491 million (mainly for Greenland halibut, EUR 179 million, −3%; and coldwater shrimp, EUR 86 million, −15%). Exports to the United States (EUR 903 million) and Norway (EUR 583 million) increased by 40% and 4%, respectively. The exports increase to the United States was mainly due to salmon and octopus, whereas for Norway, the increase was due mostly to fishmeal and mackerel. Gains were seen in exports to Switzerland, mainly because of other marine fish (EUR 127 million, +9%). On a volume basis, the leading export markets were the United Kingdom, Norway, Nigeria, China, the United States, and Ukraine, which together accounted for 52% of the export volume in 2021. Except for Norway (294.100 tonnes, +7%), and the United States (122.400 tonnes, +16%), the remaining markets experienced drops in volume, of which the largest were the United Kingdom (301.500 tonnes, −29%, mainly because of salmon) and China (152.100 tonnes, −23%).

Figure 47. **EXTRA–EU EXPORTS: MAIN PARTNERS AND MAIN COMMODITY GROUPS IN 2021 (VALUE IN BILLION EUR)***



Nominal value data are for 2021, percentages indicate change from 2020.

Figure 48. **10–YEAR TREND OF EXTRA–EU TRADE ***



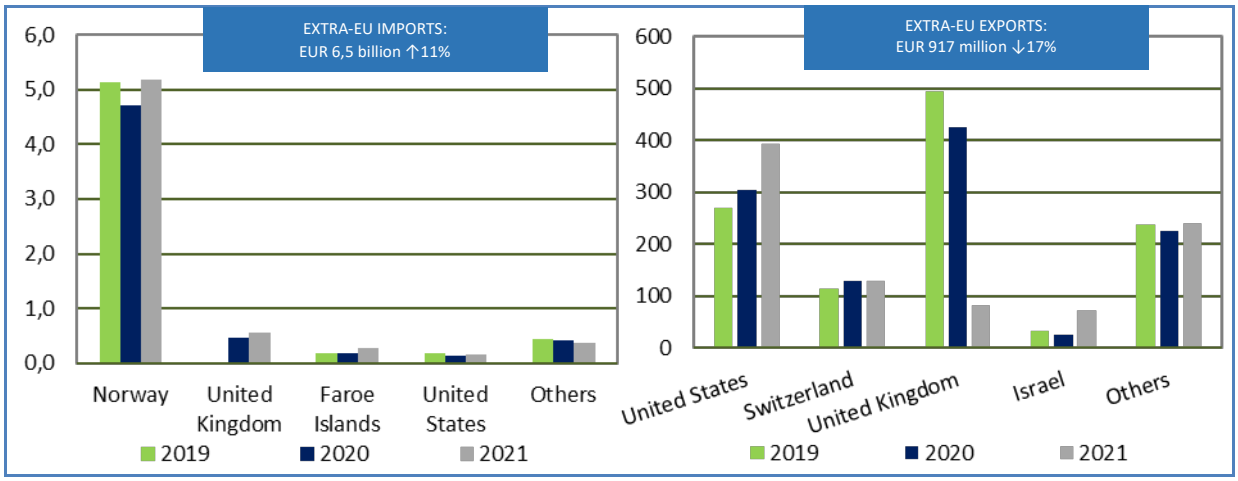
Real values: values are deflated by using the GDP deflator (base=2015).

4.3 Trade flows of salmon

EXTRA–EU IMPORTS: Salmon is the most traded species of the salmonids' commodity group, representing 98% of its value and 97% of volume. Imports of salmonids in 2021 were valued at EUR 6,7 billion and a volume of 1.090 thousand tonnes (+10% and +2%, respectively, from 2020 levels). In 2021, the EU imported EUR 6,5 billion and 1.061 thousand tonnes of salmon, up by 10% and 2%, respectively, from 2020. The EU imported salmon predominantly from Norway, which represented 79% of the total import value. Other partner countries included the United Kingdom and the Faroe Islands. In 2021, Norway supplied 865.400 tonnes at EUR 5,2 billion, up by 2% and 10% respectively from the previous year. The average unit value was 5,98 EUR/kg, up by 8% from the previous year. Imports from the United Kingdom followed a decreasing trend, ending at EUR 453 million from EUR 623 million. Volume increased however, reaching 78.100 tonnes (+13% from 2020) at the same time that unit value decreased (7,16 EUR/kg, -21% from 2020). Imports from the Faroe Islands went up since 2019, reaching 37.000 tonnes and EUR 281 million (+87% and +57% respectively). The unit value went down by 16%, ending at 7,61 EUR/kg. Imports from the United States totalled 19.600 tonnes (+6%), valued at EUR 162 million, up by 27% from 2020. The unit value was 8,24 EUR/kg, up by 20% from 2020. Salmon is mainly imported fresh.

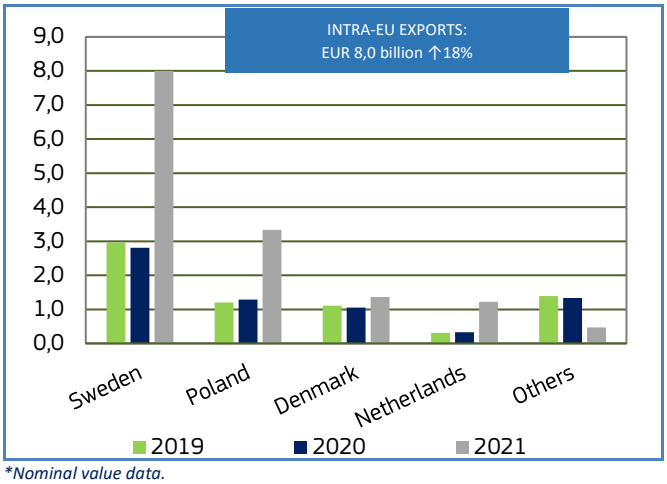
EXTRA–EU EXPORTS: Total extra-EU exports of salmon in 2021 were valued at EUR 917 million, down by 21% from 2020. At the same time, volume dropped by 39%, ending at 85.500 tonnes, while unit value reached 10,72 EUR/kg, up by 30% from 2020. Salmon accounts for 93% of the value and 90% of the volume of the salmonids' extra EU exports. The EU main export markets for salmon are the United States and Switzerland, which together absorb 57% of the extra-EU exports value. Exports to the United States increased steadily in both value and volume in the past three years from 2019 to 2021. In 2021 they totalled 30.800 tonnes (+23%) at a value of EUR 393 million (+30%) from 2020. The export unit value was 12,75 EUR/kg, 5% up from the previous year. EU exports to Switzerland are relatively small. In 2021, trade reached 7.800 tonnes (down by 3%) and EUR 128 million (almost the same as in 2020). EU exports to the United Kingdom (the third largest market for salmon) dropped sharply by 87% in volume and 81% in value, ending at 9.300 tonnes and EUR 82 million. The export unit value was 8,77 EUR/kg, 44% up from the previous year. Exports to Israel absorbed 8% of the total exports value, and the trade value was EUR 73 million, up 186% from 2020. This was due to an increase in volume (7.500 tonnes, +164%), combined with an 8% rise in price (9,81 EUR/kg). Salmon is mainly exported fresh, as well as frozen (primarily to the United States, United Kingdom, and Israel).

Figure 49. **SALMON: EXTRA-EU IMPORTS AND EXPORTS (value in billion and million EUR)***



*Nominal value data.

Figure 50. **SALMON: INTRA-EU TRADE BY MAIN EXPORTING COUNTRIES (VALUE IN BILLION EUR)***



*Nominal value data.

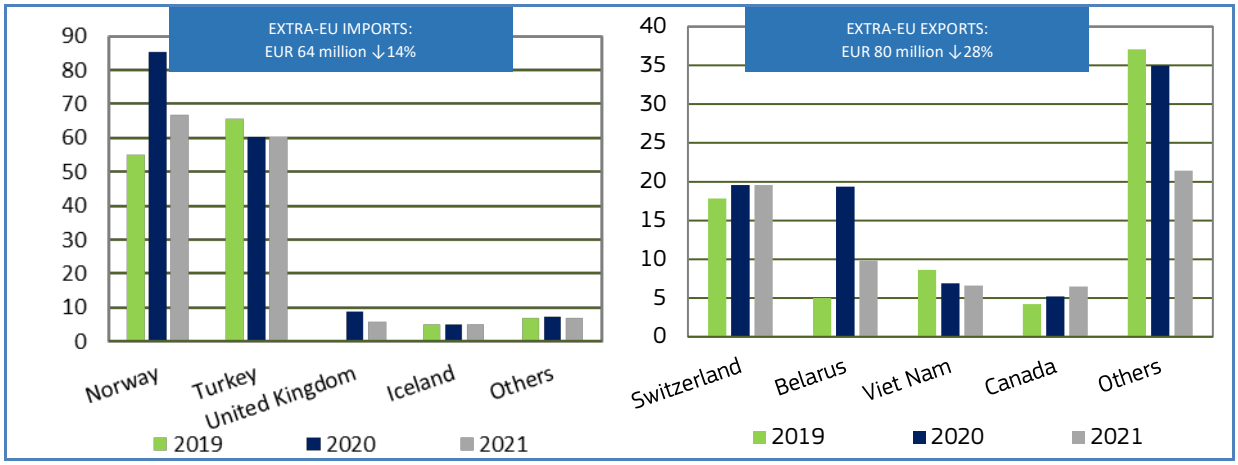
INTRA–EU TRADE: Salmon trade between the EU Member States has increased. In 2021, total intra-EU salmon exports reached 1.059 thousand tonnes (+10%), valued at EUR 8,0 billion (+19%). Average unit value was 7,56 EUR/kg, up by 4% from 2020. The Member States with the largest intra-EU exports were Sweden, Poland, Denmark, and the Netherlands, which together accounted for 80% of 2021 intra-EU trade value. Sweden, which holds the largest market share in value (42%), saw its exports increase from 2020, reaching 536.500 tonnes (+10%), valued at EUR 3,3 billion (+19%). Compared with 2020, Poland's exports were 119.000 tonnes and EUR 1,4 billion (+11% and +6%, respectively), with an average unit value of 11,45 EUR/kg (−5%). Denmark exported 178.800 tonnes (+8%), valued at EUR 1,2 billion (+16%) with an average unit price of 6,85 EUR/kg (+7%). The Netherlands, with a small export market share (6%), experienced the highest increase in trade (+41% in volume, and +43% in value), at 52.000 tonnes and EUR 475 million, respectively.

4.4 Trade flows of trout

EXTRA–EU IMPORTS: In 2021, trout extra-EU imports represented 2% of the value and 3% of volume of the salmonids' commodity group. Extra-EU imports of trout fell from 2020, to 27.400 tonnes, valued at EUR 145 million, declining 22% in volume and 14% in value. The average unit value went up by 10% (5,30 EUR/kg), augmenting the decline in import value. Norway and Turkey are the main third-country suppliers of trout, accounting for 88% of total import value between them. Other suppliers of trout are the United Kingdom and Iceland. In 2021, imports from Norway were lower in both volume (11.200 tonnes, −39% from 2020), and value (EUR 67 million, −22%) due a 28% rise in price (5,97 EUR/kg). Higher supplies from Turkey ended at 12.500 tonnes (+2%) and EUR 60 million (similar to 2020). Imports from the United Kingdom, which supplies 4% of the total value of trout, ended at 893 tonnes and EUR 6,0 million (−50% and −40% from 2020). The unit value reached 6,61 EUR/kg (+21% from 2020). Imports from Iceland saw a moderate increase in value (EUR 5,1 million, +1%), due to higher supply (668 tonnes, +11%) combined with a lower unit price 7,68 EUR/kg (−9% from 2020).

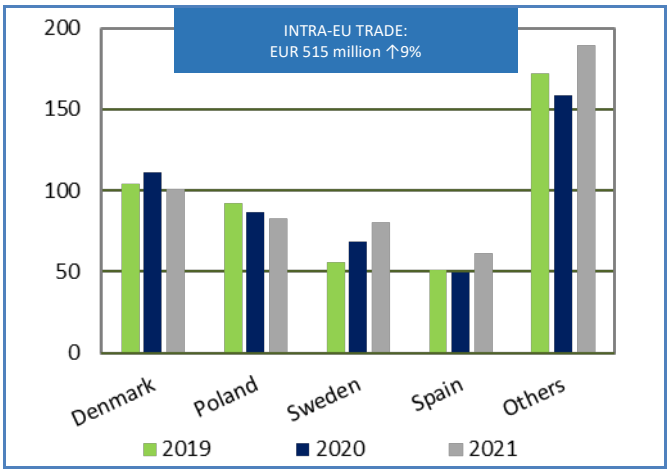
EXTRA–EU EXPORTS: EU trout exports to third-country markets have decreased in volume, totaling 8.400 tonnes (−28% from 2020), valued at EUR 64 million (−26%). Average unit values have increased, from 7,33 EUR/kg in 2020, to 7,57 EUR/kg in 2021 (+3%). The largest market for extra-EU trout exports was Switzerland (31%). Other third-country importers were Belarus (15% of total value), Vietnam, and Canada (10% each). Exports to Switzerland remained stable compared to 2020, reaching 1.800 tonnes valued at EUR 20 million. Exports to Belarus declined remarkably, ending at 2.000 tonnes and EUR 10 million (−39% and −49%, respectively), and an average unit value of 4,87 EUR/kg (−17%). At 1.600 tonnes (+122%), exports to Vietnam decreased 4% from 2020 (EUR 6,6 million). The unit price reached 4,13 EUR/kg (−57%). Exports to Canada ended at 407 tonnes (+9%) and were valued at EUR 6,5 million (+24%). The unit value reached 15,89 EUR/kg (+13%).

Figure 51. **TROUT: EXTRA-EU IMPORTS AND EXPORTS (value in million EUR)***



Nominal value data.

Figure 52. **TROUT: INTRA-EU TRADE BY MAIN EXPORTING COUNTRIES (VALUE IN MILLION EUR)***



Nominal value data.

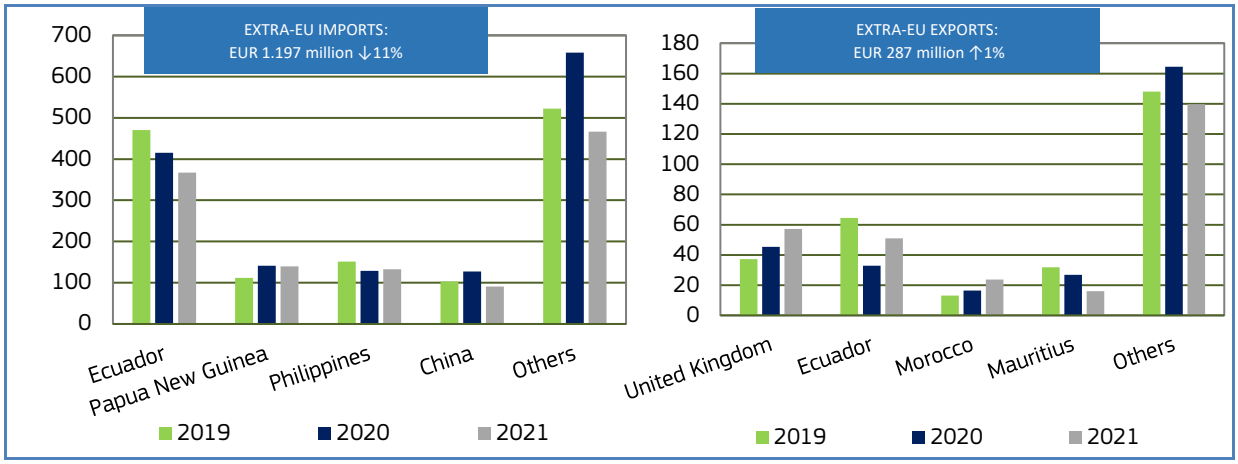
INTRA–EU TRADE: Trout exports between EU Member States in 2021 increased from 2020, totaling 90.500 tonnes (+6%), valued at EUR 515 million (+9%). The leading Member State in intra-EU exports of trout was Denmark, with 20% of total EU export value in 2021. Other contributors to the total intra-EU export value included Poland and Sweden (16% each), and Spain (12%). Danish intra-EU exports decreased in both volume (18.900 tonnes, −8%) and value (EUR 101 million, −9%). At the same time, the unit value dropped by 2%, ending at 5,34 EUR/kg. Poland export volume remained unchanged at 8.500 tonnes, while both value and price fell by 4%, ending at EUR 83 million and 9,67 EUR/kg respectively. Sweden also experienced a stable volume (14.800 tonnes); at the same time, both value EUR 81 million and unit price (5,47 EUR/kg) increased by 18%. Spain's export volume reached 12.000 tonnes (+20%), valued at EUR 62 million (+25%). The export unit value increased (+4%) ending at 5,13 EUR/kg.

4.4 Trade flows of skipjack tuna

EXTRA–EU IMPORTS: Skipjack tuna is the most traded species within the tuna and tuna-like species commodity group, accounting for 48% of the total commodity group extra-EU import value. Along with yellowfin tuna, it is one of the species most used by the world's tuna canning industry. In 2021, extra-EU imports of skipjack tuna of 342.900 tonnes, valued at EUR 1,2 billion, were down by 11% in both volume and value from 2020 levels. The average unit value of 3,49 EUR/kg in 2021 remained about the same from the preceding year. Ecuador was the largest supplier to the EU market (31% of the total EU value of skipjack tuna imports in 2021). Shipments from Ecuador decreased; in 2021 they reached 97.000 tonnes and EUR 367 million, down from 2020 by 12% and 10%, respectively. The next two largest suppliers were Papua New Guinea and the Philippines, with market shares of 12% and 11%, respectively. Imports from Papua New Guinea increased since 2019, reaching 37.800 tonnes (+6% from 2020) and 140 million (+9% from 2020), at a price of 3,70 EUR/kg, up by 3% from the preceding year. Imports from the Philippines also increased to 36.000 tonnes (+5%) valued at EUR 130 million (+8%); the import price (3,69 EUR/kg) went up by 2% from 2020. Supplies from China dropped significantly, ending at 29.200 tonnes and EUR 91 million (−33% and −36% respectively, from 2020). Import unit price also decreased by 4% (3,11 EUR/kg).

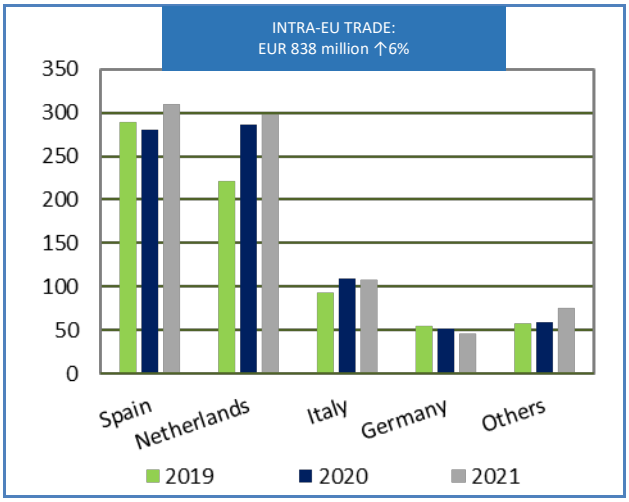
EXTRA–EU EXPORTS: In 2021, skipjack tuna exports to markets outside the EU reached 155.300 tonnes, down by 6% from 2020, at a value of EUR 287 million, up by 1% from 2020, with an average unit value of 1,85 EUR/kg (+7%). The largest markets for skipjack tuna are the United Kingdom and Ecuador, absorbing 20% and 18%, respectively, of the value of the skipjack tuna exported to third countries. The next largest markets included Morocco and Mauritius, which together accounted for 14% of the total extra-EU exports value of skipjack tuna. Exports to the United Kingdom grew remarkably in both volume and value, reaching 13.000 tonnes (+58%) at EUR 57 million (+26%), with an average unit export value of 4,41 EUR/kg (−20% from 2020). Exports to Ecuador also increased significantly: 45.000 tonnes (+48%) and EUR 51 million, at a unit price of 1,13 EUR/kg (+4%). The EU supplied Morocco with 16.800 tonnes (+35%) of skipjack tuna, at a value of EUR 24 million (+43%), and an average export price of 1,41 EUR/kg (+6%). Exports to Mauritius have experienced continuous decline since 2019, reaching 15.000 tonnes and EUR 16 million (−37% and −41%, respectively, from 2020), at an export unit value of 1,07 EUR/kg (−5%).

Figure 53. **SKIPJACK TUNA: EXTRA-EU IMPORTS AND EXPORTS (value in million EUR)***



*Nominal value data.

Figure 54. **SKIPJACK TUNA: INTRA-EU TRADE BY MAIN EXPORTING COUNTRIES (value in million EUR)***



*Nominal value data.

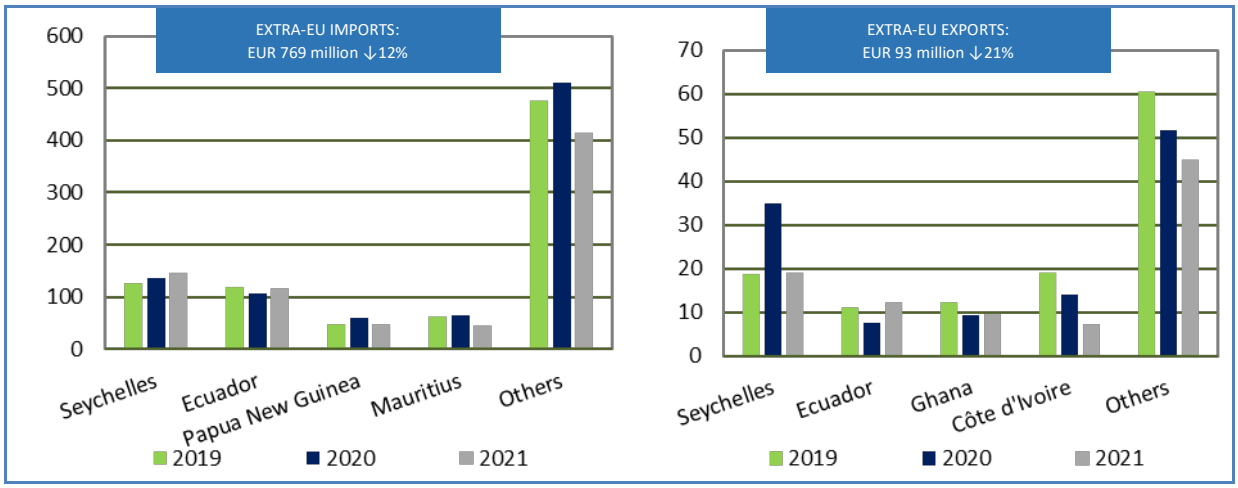
INTRA–EU TRADE: Trade of skipjack tuna between EU Member States has increased since 2019. In 2021, intra-EU exports reached 180.800 tonnes, valued at EUR 838 million (+7% and +6%, respectively from 2020). The average unit value dropped slightly to 4,63 EUR/kg (–1%). The leading exporting Member States were Spain and the Netherlands, together accounting for 73% of total export value in 2021. Other important exporters were Italy and Germany, with 13% and 6% market share respectively. At a unit value of 4,33 EUR/kg (+4%), Spain's exports totalled 71.600 tonnes (+6%), valued at EUR 310 million (+11%), from 2020. The Netherlands' exports also increased in both volume (61.200 tonnes, +6%) and value (EUR 298 million, +4%), at a lower export average price (4,88 EUR/kg, –2%). Italy experienced a slight increase in volume (17.800 tonnes, +1%), while both value EUR 108 million and unit price 6,04 EUR/kg decreased (–2%, and –3%, respectively). Germany's exports decreased in volume (12.500 tonnes, –5%), value (EUR 47 million, –11%), and average export unit price (3,73 EUR/kg, –6%).

4.4 Trade flows of yellowfin tuna

EXTRA–EU IMPORTS: Yellowfin tuna extra-EU imports decreased by 18% in volume (191.300 tonnes) and 12% in value (EUR 769 million) in 2021 from 2020, a reverse trend from 2019 to 2020. Average unit value in 2021 was 4,02 EUR/kg (+7% from 2020). The largest suppliers were the Seychelles and Ecuador, together accounting for 34% of total imports value, as well as Papua New Guinea and Mauritius (6% each). EU imports from the Seychelles totalled 35.500 tonnes (+9%), valued at EUR 146 million (+8%, from 2020). At the same time, the unit value of 4,13 EUR/kg went slightly down (–1%). EU imports from Ecuador grew in both volume and value, reaching 24.100 tonnes and valued at EUR 116 million (+16% and +7%, respectively). The unit value of 4,79 EUR/kg went down by 8% from 2020. Yellowfin tuna imported from Papua New Guinea experienced decreases in both volume (10.500 tonnes, –26%) and value EUR 48 million (–18%). At the same time, the unit value increased by 11%, reaching 4,62 EUR/kg. Imports from Mauritius also experienced significant decrease, ending at 9.700 tonnes (–26%) and EUR 45 million (–32%), at an import unit value of 4,64 EUR/kg (–8%) from 2020.

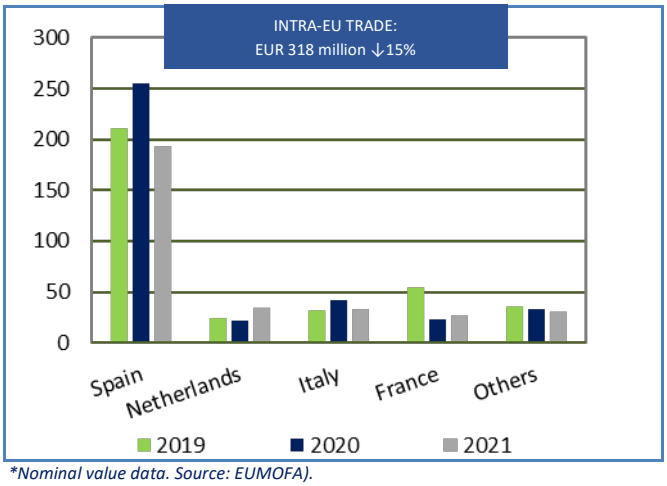
EXTRA–EU EXPORTS: Total extra-EU exports of yellowfin tuna decreased significantly in 2021 from 2020, from 63.800 tonnes to 46.100 tonnes, and from EUR 118 million to EUR 93 million, while the average export unit value went up from 1,84 EUR/kg (2020) to 2,02 EUR/kg (2021). EU exports to the Seychelles, the largest market (accounting for 21% of the total export value) were 51% down in volume (10.300 tonnes), and 45% down in value (EUR 19 million), reversing the trend from 2019 to 2020. At 1,85 EUR/kg, the unit value increased by 12% from 2020. By contrast, exports to Ecuador increased in both volume (9.000 tonnes) and value (EUR 12 million), by 53% and 60% respectively, at a unit price of 1,36 EUR/kg (+5%). Exports to Ghana (accounting for 10% of the total export value) experienced declines in volume (4.400 tonnes, –2%), and the opposite in value (EUR 9,6 million, +2%) and unit price (2,19 EUR/kg, +4%). Export value to Côte d'Ivoire ended at 3.700 tonnes (–46%) and EUR 7,1 million (–49%). Export unit value was EUR 1,89 EUR/kg (down by 6% from 2020).

Figure 55. **YELLOWFIN TUNA: EXTRA-EU IMPORTS AND EXPORTS (value in million EUR)***



*Nominal value data.

Figure 56. **YELLOWFIN TUNA: INTRA-EU TRADE BY MAIN EXPORTING COUNTRIES (value in million EUR) ***



**Nominal value data. Source: EUMOFA).*

INTRA–EU TRADE: In 2021, intra–EU exports of yellowfin tuna totalled 57.900 tonnes (–7%), valued at EUR 318 million (–15%), and an average export unit value of 5,50 EUR/kg (–8% from 2020). In 2021, the largest yellowfin tuna exporting Member State was Spain (accounting for 61% of the total export value), followed by the Netherlands (11%), Italy (10%), and France (8%). In 2021, Spain exports reached 36.000 tonnes (–20%), valued at EUR 194 million (–24%) from 2020; the unit value went down by 5% (5,38 EUR/kg). The Netherlands experienced a significant increase: 4.600 tonnes valued at 35 EUR million (+68% and +57%, respectively, since 2020), while the unit export value 7,57 EUR/kg decreased (–6%). Italy experienced an opposite trend from 2020: yellowfin tuna exports dropped in both volume (4.500 tonnes) and value (EUR 33 million), –21% each, at a unit price (7,28 EUR/kg) which was slightly lower (–1%) than the preceding year. At 5.500 tonnes (+26%) of yellowfin tuna valued EUR 27 million (+18%), and an export price of 4,86 EUR/kg (–6%), France experienced an increase.

5. Case study – EU-UK Trade flows

5.1. Brexit

In the UK referendum held on the 23rd June 2016, with a 51,89% majority, UK citizens voted to leave the EU. Despite several delays, the UK formally left the EU on the 31st January 2020. While the UK was part of the EU, it benefitted from FAPs moving freely and without tariffs inside the single market. Now, the FAPs are subject to the terms agreed to in the EU-UK Trade and Cooperation Agreement(TCA) which cover both rules on tariffs and non-tariff measures[40].

Prior to Brexit, in 2016, UK was the EU MS with the second-highest catch in volume, behind Spain.. These two MS globally ranked as the 27th and 21st largest fisheries nations in the world, respectively. In terms of volume, the UK was also the second-largest EU aquaculture producer, behind Spain, and ranked 25th for global production. In the most recently available FAO data (2020), the UK was still the 27th largest global aquaculture producer with 221.000 tonnes and the 32nd largest catch nation with catches of 626.000 tonnes.

Overall, the trade between the EU and UK is lower in 2021 than previous years both in terms of volume and value. Although the UK on one hand enjoys tariff-free access to EU markets for FAPs under the TCA, on the other hand non-tariff barriers (i.e. expensive administrative duties) are an obstacle that seems to be translated into a decrease of trade flows in both direction. This effect is more substantially impacting UK trade flows because UK exports to the EU represent the majority of UK exports of FAPs (69% of exported FAP volume in 2021), whereas in the other direction the UK market is only one of the markets to which the EU exports (13% of FAP export volume in 2021). As such there are grounds to conclude that Brexit has on a global scale negatively impacted seafood trade in both directions, but the relative impact is more severe on the UK side.

5.2. EU trade with the UK

Within Eurostat, trade between EU MS is reported as intra-EU trade while trade between EU MS and third countries are reported as extra-EU trade. In the Eurostat data, the UK was considered part of the EU until February 2020, meaning trade flows between the EU and the UK in January 2020 are reported as intra-EU trade. As such, prior to February 2020 trade between the UK and other EU MS was reported as intra-EU trade, while after January 2020 trade flows are reported as extra-EU. In order to compare changes in trade pre- and post-Brexit, data regarding previous intra-EU trade between EU MS and the UK (trade in January 2020 and prior) is changed to extra-EU trade for the purpose of this analysis. The use of this methodology ensures all trade flows are accounted for thus allowing for a comparison of actual trade flows between the markets.

It should also be remembered that 2020 represented a year with unusual trade flows due to the COVID-19 pandemic, which affected many sectors[41]. The abrupt closure and gradual reopening of the HoReCa segment in 2020 and 2021 also affected the demand for species popular in this segment, in addition to changes in production and logistical issues. As such, when comparing 2020 and 2021 with previous years, both Brexit and COVID-19 can be considered as factors contributing to the unusual trade phenomena these years.

EU imports from the UK

In 2021, the EU imported 368.000 tonnes of FAPs for a value of 1,507 billion EUR from the UK. Although this amount was lower than the two years prior, import of certain species increased both in volume and value. Especially prominent was the increase in imports of blue whiting and salmon.

[40] Trade flows to and from Norther Ireland are subject to a particular agreement. More information on the subject is available through the European Commission official website: https://ec.europa.eu/info/strategy/relations-non-eu-countries/relations-united-kingdom/eu-uk-withdrawal-agreement/protocol-ireland-and-northern-ireland_en#protocol-on-ireland-and-northern-ireland

41 See previous EUMOFA publication on the effects of COVID-19 such as Effects of COVID-19 (MH n. 10-2020), Impacts of COVID-19 (MH n. 05-2020), and the COVID-19 Overview of the fisheries and aquaculture sector (bulletin collection), and EUMOFA talks on the subject such as COVID-19 and seafood: impact and way forward

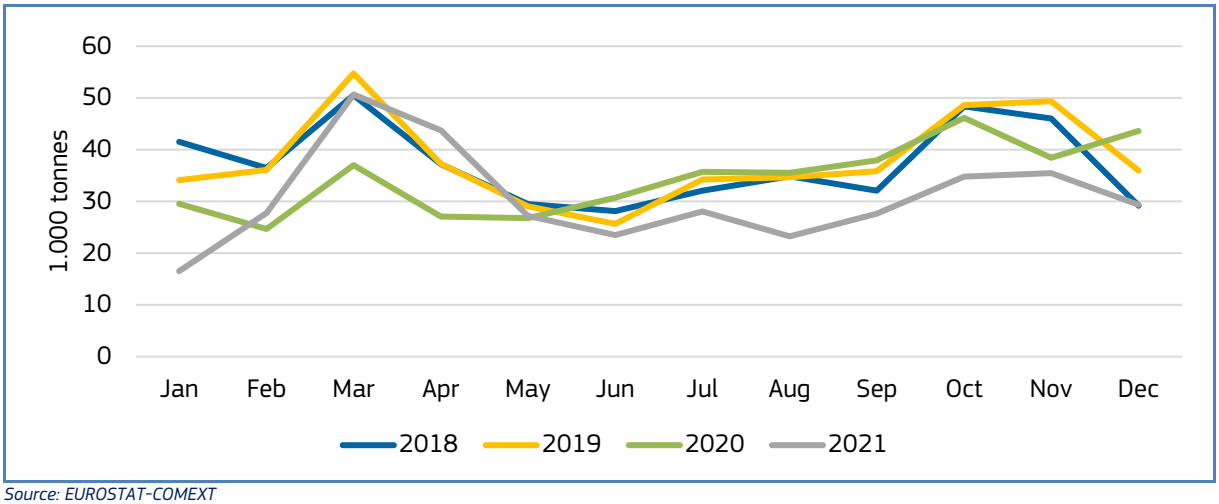
EU imports from the UK exhibit some seasonality, with peaks around March, October, and November. The majority of imports in 2021 were live/fresh products (57%) and frozen products (30%). In 2021, France received 44% of EU imports, followed by the Netherlands (21%), Ireland (16%), and Denmark (9%). During 2020 and 2019, the shares of imports among these (?) importing MS were slightly more diverse.

Table 24. **EU IMPORTS FROM THE UK (VOLUMES IN 1.000 TONNES, VALUES IN MILLION EUR)**

MCS	2018		2019		2020		2021		Change 2021/2019		Change 2021/2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Salmon	55	433	70	509	72	485	78	559	12%	10%	9%	15%
Mackerel	59	76	58	93	46	74	56	82	-3%	-12%	23%	11%
Blue whiting	14	3	9	2	11	3	49	13	442%	441%	326%	360%
Herring	34	37	27	29	27	32	16	11	-41%	-62%	-42%	-65%
Crab	13	78	14	81	12	63	14	78	-1%	-3%	15%	25%
Norway lobster	10	98	11	104	9	79	14	128	23%	23%	48%	62%
Other	261	1.143	267	1.164	236	1.015	142	635	-47%	-45%	-40%	-37%
Total*	**446**	**1.867**	**456**	**1.983**	**413**	**1.751**	**368**	**1.507**	**-19%**	**-24%**	**-11%**	**-14%**

**Totals may not correspond to the exact sum of values displayed in table due to rounding.*
Source: EUROSTAT-COMEXT

Figure 57. **EU IMPORTS FROM THE UK (VOLUME IN 1.000 TONNES)**



Source: EUROSTAT-COMEXT

EU exports to the UK

In 2021, the EU exported 302.000 tonnes of FAPs for a value of 1,042 billion EUR to the UK. This largely included soups, broths, and preparations[42], covering 16% of the exported volume and 15% of the value, followed by fishmeal (13% of volume, 6% of value), and marine fish of unknown species[43], which covered 12% of volume but 16% of value.

42 In EUMOFA, these items are included in the Main Commercial Species "Other products". In 2021, the volume of this category consisted of 75% soups, broths and preparations, and 25% food preparations consisting of finely homogenised mixtures of two or more basic ingredients, such as meat, fish, vegetables, or fruit, put up for retail sale as infant food or for dietetic purposes, in containers of <= 250 g.
43 In EUMOFA, these items are included in the Main Commercial Species "Other marine fish". In 2021, the volume of this category consisted of 79% frozen raw fish fillets, coated with batter and/or breadcrumbs, whether or not pre-fried in oil (excl. *Salmonidae*, herrings, sardines, sardinella, brisling or sprats, tunas, skipjack and Atlantic bonito, bonito "*Sarda* spp.", mackerel, and anchovies).

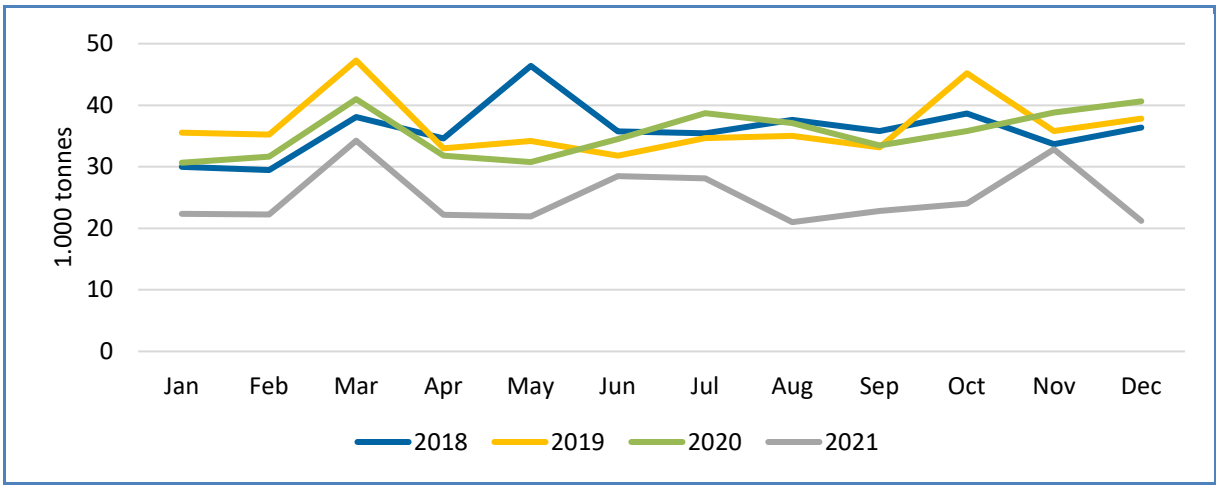
The preservation states prepared/preserved (37%), unspecified (32%), frozen (23%), and live (7%) dominated the EU exports in 2021. A clear reduction in the export of live/fresh preservation state, compared to previous years when this covered roughly 25% of exports, can be explained by a reduction in salmon exports which fell from nearly 50.000 tonnes in 2020 to 98 tonnes in 2021. The reason behind this reduction is fewer exports from Sweden – which is the first point of entry to the EU for most of the Norwegian salmon, and Denmark which has a significant processing industry producing fillets from Norwegian salmon.

Table 25. **EU EXPORTS TO THE UK (VOLUMES IN 1.000 TONNES, VALUES IN MILLION EUR)**

MCS	2018		2019		2020		2021		Change 2021/2019		Change 2021/2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Other products*	50	191	54	178	57	183	47	154	-12%	-13%	-18%	-15%
Fishmeal	42	60	48	69	57	85	40	62	-16%	-9%	-30%	-27%
Other marine fish**	43	174	43	183	45	199	37	149	-13%	-18%	-17%	-25%
Fish oil	18	33	21	37	22	42	30	52	42%	40%	37%	24%
Other non-food use***	22	19	20	20	22	28	20	24	0%	19%	-10%	-11%
Mackerel	21	49	29	70	16	53	15	46	-49%	-34%	-10%	-13%
Cod	27	143	27	171	18	109	14	76	-46%	-56%	-22%	-31%
Tuna, skipjack	5	25	6	37	8	45	13	57	109%	54%	58%	26%
Other	203	1.194	192	1.061	178	943	84	421	-56%	-60%	-53%	-55%
Total**	**432**	**1.886**	**439**	**1.825**	**425**	**1.685**	**302**	**1.042**	**-31%**	**-43%**	**-29%**	**-38%**

**In 2021, the volume of this category consisted of 75% soups, broths and preparations, and 25% food preparations consisting of finely homogenised mixtures of two or more basic ingredients, such as meat, fish, vegetables or fruit, put up for retail sale as infant food or for dietetic purposes, in containers of <= 250 g.*
*** In 2021, the volume of this category consisted of 79% frozen raw fish fillets, coated with batter or breadcrumbs, whether or not pre-fried in oil (excl. salmonidae, herrings, sardines, sardinella, brisling or sprats, tunas, skipjack and Atlantic bonito, bonito "sarda spp.", mackerel, and anchovies).*
****This MCS covers non-food use products other than fish meal and fish oil. In 2021, the volume of this category consisted of 30% seaweeds and other algae, fresh, chilled, frozen, or dried, whether or not ground, and unfit for human consumption; 21% fish waste; 12% products of fish or crustaceans, molluscs or other aquatic invertebrates (excl. fish waste); dead fish, crustaceans, molluscs or other aquatic invertebrates, unfit for human consumption.*
*****Totals may not correspond to the exact sum of values displayed in table due to rounding.*
Source: EUROSTAT-COMEXT

Figure 58. **EU EXPORTS TO THE UK (VOLUME IN 1.000 TONNES)**



Source: EUROSTAT-COMEXT

5.3. Focus on the UK exports as reported by the national source

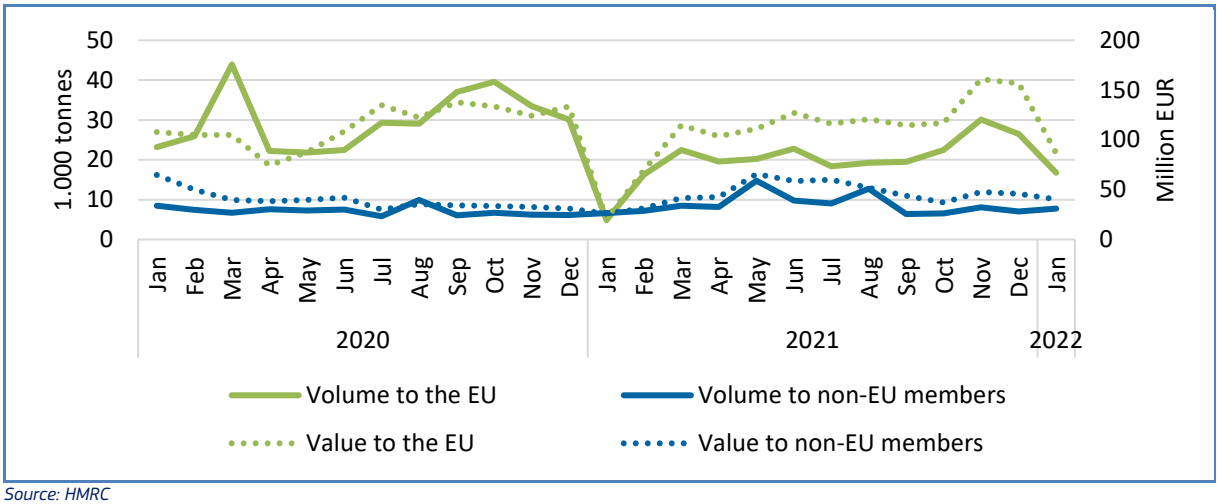
When considering trade data reported by the UK through Her Majesty's Revenue and Customs (HMRC - the UK's tax, payments and customs authority), there are several issues to be aware of following Brexit. Stakeholders/traders/exporters in the UK were not prepared for the administrative burdens and increased paperwork starting from January 1st, 2021. This unpreparedness had a negative impact on the volume of trade in January 2021, although trade flows have since gradually recovered and normalised compared to previous years.

The month of January 2021 shows a severe drop of exports. According to some industry stakeholders, data delays during the first months of 2021 were caused by changes to the export system implemented to facilitate an easier supply chain to the EU with less checks and less delays at ports[44]. Part of the decision to simplify customs to facilitate an easier supply chain to the EU involved dropping a check which registered the goods as having arrived in the EU. To handle this change, exporters were expected to tick an extra box on the export declaration; something they did not know they had to do. The result was that although goods were leaving the UK and arriving in the EU, they were not registered in the UK customs as "arrived". If the exporter/declarant failed to comply with the changes, the transaction did not register as "completed", thus the declaration remained "open" for a period of 60 days. At that point, HMRC received a notification and "closed" the declaration before including it in the current trading month. This change was implemented from 1st January, so it did not affect any trade data prior to 2021. However, registered export data from HMRC in February and March 2021 may likely contain trade that occurred as much as 60 days prior (but not earlier than 1st January 2021). In other words, volumes and values of UK trade flows which occurred in January 2021 can appear in the February 2021 or March 2021 data. Unfortunately, HMRC does not seem to have made revisions and adjusted the data published for the first quarter of 2021.

Due to the challenges of HMRC in recording trade in January 2021, as evident in figure 59 and figure 60, comparing trade for this month with the same months in other years might not reflect the actual changes. For this study, 2020 is considered more appropriate as a base year to evaluate changes in exports, rather than 2021. When comparing UK exports in January 2022 with those of January 2021, an increase can be seen for all commodity groups with the exception of freshwater fish which was 98% lower than in 2021. On the other hand, when comparing UK exports in January 2022 with those in January 2020, the export volumes are lower for all the main commercial species (MCS), with a few exceptions for small pelagics (due to an increase in mackerel exports) and miscellaneous aquatic products (due to increases in the MCS caviar, liver, and roes, and for the MCS category "Other products"). However, the value of all exports for all MCS from the UK to the EU are lower in 2021 when compared to 2020. UK exports in January 2022 are also lower than in January 2019, both in volume and value.

44 More information about the controls and declaration procedures between the UK and the EU is available at inter alia: i) https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/949579/December_BordersOPModel__2_.pdf ii) https://www.ons.gov.uk/economy/nationalaccounts/balanceofpayments/articles/impactofthecoronavirusandeuexitonthecollectionandcompilationofuktradestatistics/2021-03-08#toc, and; iii) https://www.gov.uk/guidance/sending-goods-to-the-eu-through-roll-on-roll-off-ports-or-the-channel-tunnel and iv) https://www.gov.uk/guidance/making-a-full-export-declaration.

Figure 59. **UK EXPORTS OF FAPS BY DESTINATION (VOLUME IN 1.000 TONNES, VALUE IN MILLION EUR)**

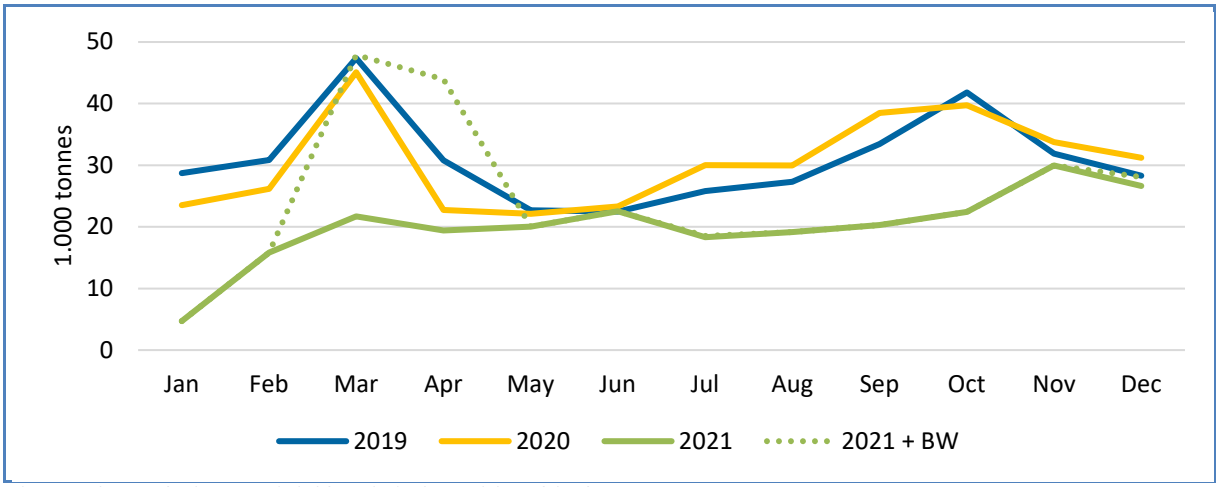


Source: HMRC

A second issue concerns the recording of foreign landings as exports. In the years 2018-2020, HMRC recorded that the UK exported between 6.955 tonnes and 28.377 tonnes of blue whiting to the EU. However, in 2021, no blue whiting exports to the EU were recorded by HMRC contrary to previous years. The UK government registered 52.310 tonnes (live weight equivalent) landed by British vessels in the ports of Ireland, Denmark, and the Netherlands. This was 35% higher than the volumes in 2020, and slightly lower compared with 2019 (-1%) and 2018 (-2%). It should also be noted that EUROSTAT recorded a total import of 48.000 tonnes of blue whiting from the UK in 2021. As such, there are reasons to believe that exports of blue whiting in 2021 have not been included in HMRC data. The same situation has been found for several other species, but not at such a scale. This speculation is only valid for exports to the EU, as HMRC did report exports of blue whiting to Nigeria (8.687 tonnes) and Ukraine (565 tonnes) in 2021.

Figure 61 shows that by including the volumes of blue whiting landings in the export statistics, the large gap between exports in March 2021, 2020, and 2019 is reduced. Although these are just assumptions, they should be kept in mind when comparing trade data for 2021 with previous years, especially flows occurring in the first quarter of the year.

Figure 60. **UK EXPORTS OF FAPS* TO THE EU, INCLUDING UK LANDINGS OF BLUE WHITING IN THE EU (VOLUME IN 1.000 TONNES; LANDINGS IN LIVE WEIGHT)**



**The MCS other non-food use is excluded from the background data of this figure*
Source: EUMOFA elaboration of data from HMRC and GOV.uk

6. Global highlights

EU / Green deal / Oceans: At the "Our Ocean Conference" on 14th April 2022, the EU announced a EUR 1 billion-worth of commitment for the protection of oceans. The commitment covers all relevant fields including marine protected areas, tackling marine pollution, confronting the ocean climate crisis, creating sustainable blue economies, advancing sustainable small-scale fisheries and aquaculture, and achieving a safe, just, and secure ocean. The EU has also developed a "commitment tracking tool" to enable citizens to follow the progress of implementation of the commitments[45].

EU / Crisis support: On 13th April 2022, the Commission proposed a legislative amendment to the European Maritime and Fisheries Fund 2014-2020 which would allow for additional crisis measures to support the EU fishery and aquaculture sectors in the context of Russia's invasion of Ukraine. It comprises financial compensation for additional costs, income forgone and storage of products, as well as for the temporary cessation of fishing activities where they are currently unsafe. This is a legislative proposal which needs to be adopted by the European Parliament and the Council before it can take effect[46].

EU / Norway / Fisheries: In late April, Norway and the EU reached a political understanding in relation to the fisheries in the Northeast Arctic, in ICES subareas 1 and 2. The area concerned includes the waters around the archipelago of Svalbard and the international waters of the Barents Sea. The understanding ensures sustainable fishing in the Northeast Arctic, while also providing certainty for EU fleets fishing in that area[47].

Iceland / Aquaculture / Supply: The production of farmed fish in Iceland has increased in the last few years and reached 53.000 tonnes in 2021, which was 12.000 tonnes more than in 2020. The main aquaculture product is Atlantic salmon, which comprises 90% of all fish farming. The farming of arctic char was 5.390 tonnes in 2021 and rainbow trout was 951 tonnes[48].

Mediterranean / Aquaculture / Supply: The General Fisheries Commission for the Mediterranean of the Food and Agriculture Organization of the United Nations is working together with the Centre for Advanced Studies of the Spanish National Research Council and Urchinomics to enhance the roe of sea urchins in the Mediterranean and turn them into premium seafood[49].

Europe / New seafood trends: New seafood trends are emerging from the COVID-19 pandemic and rapidly rising inflation in Europe, which is exacerbated by Russia's invasion of Ukraine. The European Union's annual inflation rate reached 6,2% in February 2022, up from 5,6% in January 2022, while a year earlier this rate was 1,3%. Seafood prices were up 4,9% in February 2022, compared to a year prior. The recent aforementioned crisis have driven an increase in the cost of marine fuel and electricity, resulting in higher costs for seafood production and processing. Shortages are also expected for substitutes due to competition from other agri-food sectors and from bioenergy production. This negative supply shock is increasing pressure on prices, which is likely to generate increase of prices up to consumers. Combined with the elevation of Europe's seafood demand through the pandemic, there could be a substitution effect toward cheaper, imported seafood products[50].

Norway / Aquaculture: In its latest report on raw materials for salmon and trout, food research institute Nofima has found that Norwegian salmon feed producers have started to use novel fish feed ingredients, such as insect meal and microalgae. This is considered as a step towards the goals of the Norwegian government to produce more salmon feed by utilising national resources that originate from sustainable sources[51].

[45] https://ec.europa.eu/commission/presscorner/detail/en/IP_22_2398
[46] https://ec.europa.eu/commission/presscorner/detail/en/ip_22_2408
[47] https://ec.europa.eu/commission/presscorner/detail/en/ip_22_2722
[48] https://www.statice.is/publications/news-archive/fisheries/aquaculture-2021/
[49] https://www.fao.org/gfcm/news/detail/en/c/1506073/
[50] https://www.seafoodsource.com/news/supply-trade/covid-inflation-triggering-upheaval-in-european-seafood-marketplace
[51] https://www.globalseafood.org/advocate/report-more-norwegian-salmon-feed-producers-are-using-novel-fish-feed-ingredients/

7. Macroeconomic Context

7.1. Marine fuel

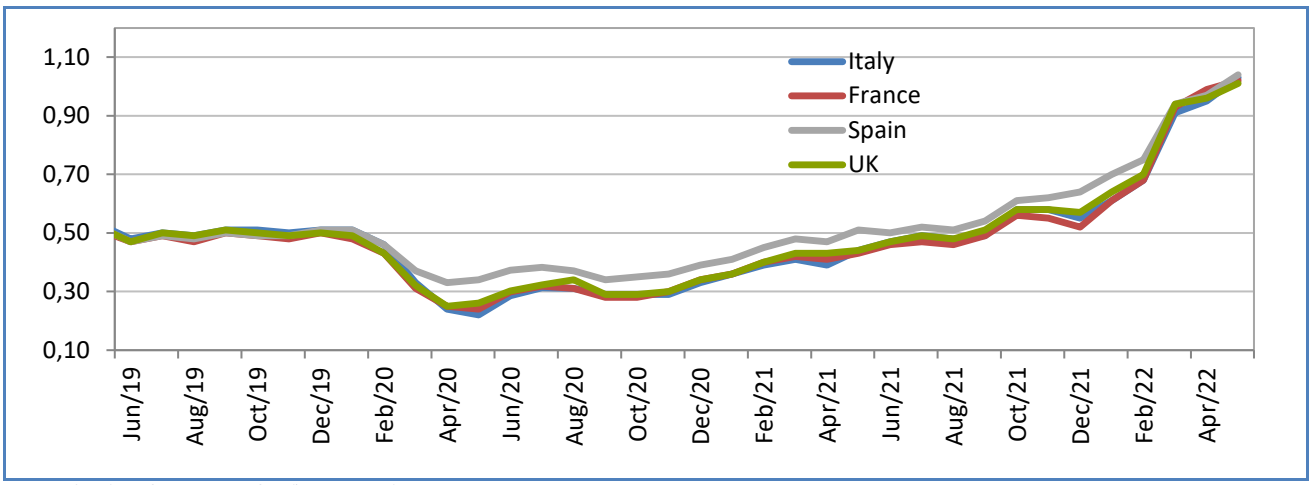
Average prices for marine fuel in **May 2022** ranged between 1,01 and 1,04 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices increased by an average of about 5,9% compared with the previous month, and they also increased by an average of 125,3% compared with the same month in 2021.

Table 26. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	May 2022	Change from Apr 2022	Change from May 2021
France *(ports of Lorient and Boulogne)*	1,02	3%	137%
Italy *(ports of Ancona and Livorno)*	1,03	8%	134%
Spain *(ports of A Coruña and Vigo)*	1,04	7%	104%
The UK *(ports of Grimsby and Aberdeen)*	1,01	5%	130%

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

Figure 61. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

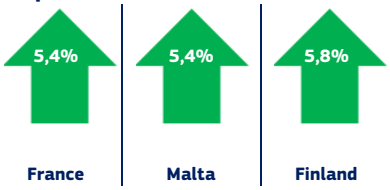


Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

7.2. Consumer prices

The EU annual inflation rate was at 8,1% in April 2022, up from 7,8% in March 2022. A year earlier, the rate was 2%.

Inflation: lowest rates in April 2022, compared with March 2022.



Inflation: highest rates in April 2022, compared with March 2022.

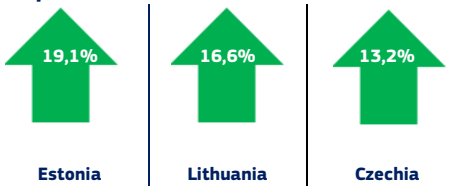


Table 27. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

	Apr 2020	Apr 2021	Mar 2022	Apr 2022	Change from Mar 2022		Change from Apr 2021	
Food and non-alcoholic beverages	110,31	110,45	117,09	119,99	↑	2,5%	↑	8,6%
Fish and seafood	114,89	114,12	121,31	122,85	↑	1,3%	↑	7,6%

Source: Eurostat.

7.3. Exchange rates

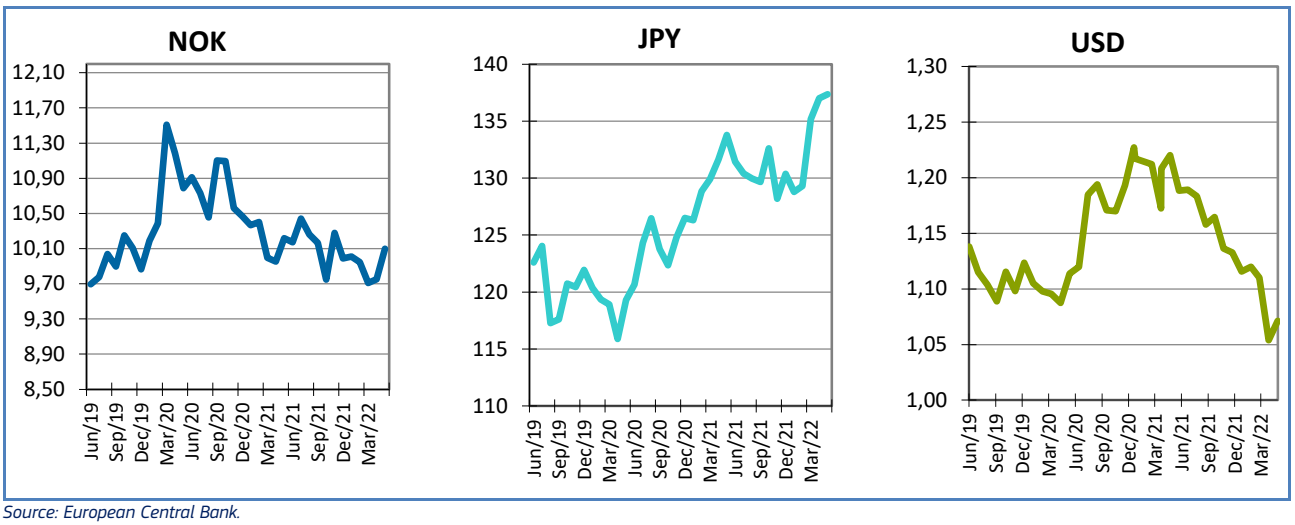
Table 28. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	May 2020	May 2021	Apr 2022	May 2022
NOK	10,788	10,2183	9,7525	10,0983
JPY	119,29	133,79	137,01	137,36
USD	1,1136	1,2201	1,054	1,0713

Source: European Central Bank.

In May 2022, the euro appreciated against the Norwegian krone (3,5%), the US dollar (0,1%), and against the Japanese yen (0,3%), relative to the previous month. For the past six months, the euro has fluctuated around 9,92 against the Norwegian krone. Compared with May 2021, the euro has appreciated 2,7% against the Japanese yen, and depreciated 12,2% against the US dollar, 1,2% against the Norwegian krone.

Figure 62. **TREND OF EURO EXCHANGE RATES**



Source: European Central Bank.

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

First sales: EUR-Lex, DG Mare – European Commission, FAO, ICES, Eur-LEX, Directorate of Fisheries of Norway, Fishbase.se, British Sea Fishing, Scientia Marina Vol 60., Current Politics and Economics of Europe.

Consumption:

Case studies: EUROSTAT-COMEXT, The Government of the United Kingdom, Office for National Statistics of the UK, HM Revenue and Customs

Global highlights: DG Mare - European Commission, FAO, Global Seafood Alliance, SeafoodSource, Statistics Iceland.

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

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

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

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

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

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

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