European Commission

Monthly Highlights

No. 7 / 2022

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

In this issue

In April 2022, ten EU Member States (MS), Norway, and the United Kingdom reported first-sales data for ten commodity groups (CG). The "freshwater fish" commodity group recorded the 9th highest value and volume out of the 10 CGs in the countries monitored by EUMOFA.

Over a 36-month observation period (May 2019–April 2022), the weighted average first-sales price of pike-perch in France was 10,26 EUR/kg, 226% higher than that of Estonia (3,15 EUR/kg), and 38% greater than that of the Netherlands (7,43 EUR/kg).

In Italy, where gilthead seabream is the most consumed fresh species, consumption of the species reached a five-year peak in 2021 in terms of both value and volume.

In 2021, global Atlantic mackerel catches reached 1,13 million tonnes, an 8% increase from 2020. EU catches were estimated at approximately 219.000 tonnes, which accounted for 19% of global catches.

The EU fishery and aquaculture sectors are directly impacted by the recent increase in costs of marine fuel, electricity, and fish feed for aquaculture, resulting in higher costs for production and processing. The shortage in some key raw materials and inputs has also increased pressure on prices, which rose significantly in the recent period.

Contents

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1. First sales in Europe

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

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

Increases in value and volume: France recorded an increase in both first sales value and volume, though the change in volume was very small, with no real significance. Scallop and octopus were principally responsible for increases in volume. Besides scallop, mainly seaweed and other algae kept first-sales volumes stable in France.

Decreases in value and volume: Bulgaria, Cyprus, Estonia, Italy, Latvia, and Lithuania recorded decreases in first-sales value and volume. Bulgaria and Lithuania stood out with the most significant drop in absolute terms. In Bulgaria it was due to lower first sales of clam and sprat, while in Lithuania it was due to herring, smelt, and sprat, both in volume and value.

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

	January – April 2020		January – April 2021		January – April 2022		Change from January – April 2021	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Bulgaria	326	0,3	720	0,6	383	0,3	-47%	-43%
Cyprus	98	0,7	130	0,9	116	0,8	-11%	-16%
Estonia	22.572	6,1	29.545	7,1	26.468	6,4	-10%	-9%
France	60.336	185,4	70.607	217,0	70.661	247,6	0%	14%
Italy	22.521	85,7	25.784	106,0	21.417	103,4	-17%	-2%
Latvia	18.200	3,6	20.811	4,3	16.485	3,5	-21%	-19%
Lithuania	958	0,4	1.286	0,7	639	0,4	-50%	-42%
Netherlands	80.628	114,4	65.833	88,7	78.521	81,2	19%	-9%
Portugal	18.617	60,7	22.290	72,7	20.235	85,5	-9%	18%
Spain	156.257	409,6	156.312	425,4	135.176	446,1	-14%	5%
Norway	1.239.910	1131,2	1.207.953	1065,8	1.135.584	1296,8	-6%	22%
United Kingdom	97.975	185,5	112.256	182,0	105.614	198,8	-6%	9%

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 24.6.2022.

1.2. April 2022 compared to April 2021

Increases in value and volume: First sales increased in France in both value and volume, though the change in volume was small with no statistical significance. Mainly cod, scallop, and octopus were behind the increase in France.

Decreases in value and volume: First sales decreased in Bulgaria, Cyprus, Estonia, Latvia, Lithuania, the Netherlands, and the United Kingdom. Most significant drops were observed in Bulgaria, Lithuania, and the Netherlands, which was due to clam, and other molluscs and aquatic invertebrates in Bulgaria, herring and smelt in Lithuania, and blue whiting and mackerel in the Netherlands.

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

	April 2020		April 2021		April 2022		Change from April 2021	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Bulgaria	189	0,1	540	0,3	285	0,1	-47%	-61%
Cyprus	21	0,1	38	0,3	34	0,2	-9%	-16%
Estonia	5.606	1,6	5.189	1,7	4.592	1,5	-12%	-12%
France	14.871	34,4	18.037	52,0	18.122	59,2	0%	14%
Italy	5.910	20,9	6.534	28,5	6.057	31,5	-7%	11%
Latvia	4.821	1,0	4.584	0,9	3.969	0,8	-13%	-12%
Lithuania	309	0,1	262	0,1	178	0,1	-32%	-37%
Netherlands	26.384	32,6	19.966	25,6	4.058	11,7	-80%	-54%
Portugal	4.611	13,0	8.140	21,1	5.752	21,4	-29%	1%
Spain	40.969	96,5	50.488	130,0	48.875	152,4	-3%	17%
Norway	314.711	233,3	250.405	229,8	232.721	275,7	-7%	20%
United Kingdom	11.876	21,1	26.382	39,7	17.277	37,1	-35%	-6%

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

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

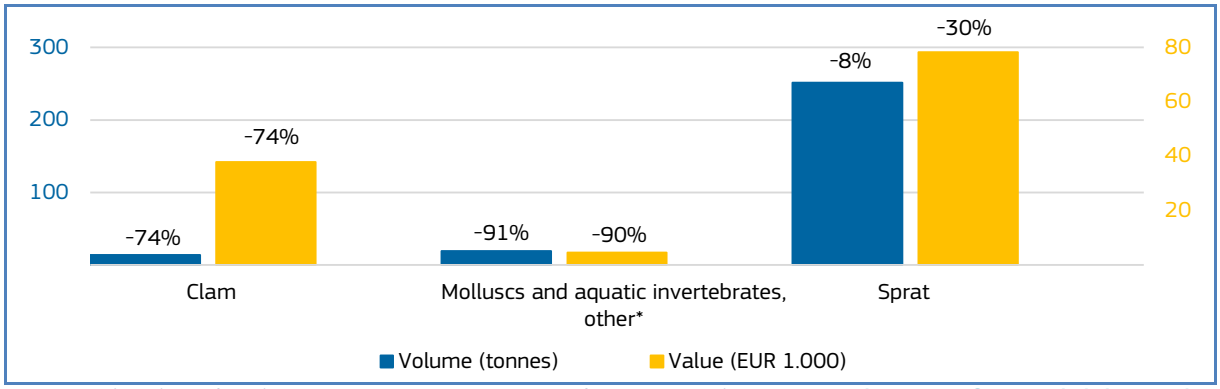
1.3. First sales in selected countries

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-Apr 2022 vs Jan-Apr 2021	EUR 0,3 million, -43%	383 tonnes, -47%	Clam, sprat, other molluscs and aquatic invertebrates*.
Apr 2022 vs Apr 2021	EUR 0,1 million, -61%	285 tonnes, -47%	Clam, other molluscs and aquatic invertebrates*, sprat.

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

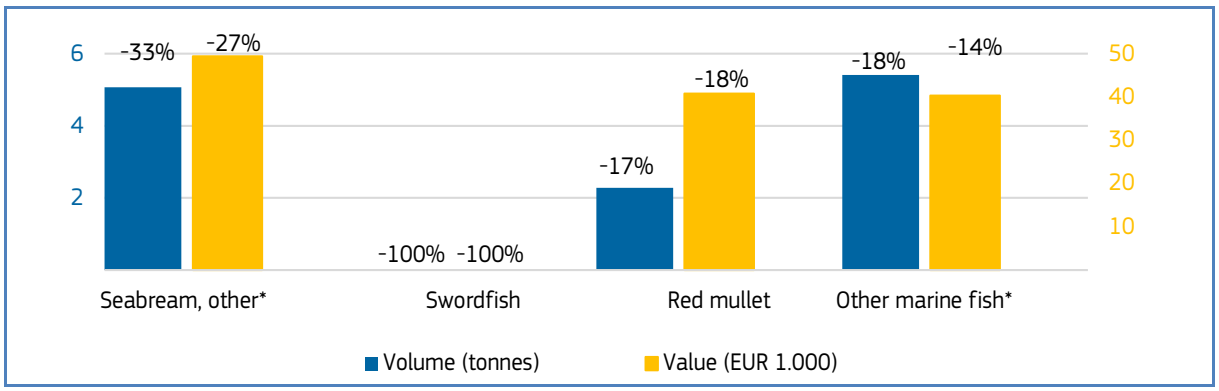


*Percentages show change from the previous year. *EUMOFA aggregation for species. Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies*

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2022 vs Jan-Apr 2021	EUR 0,8 million, -16%	116 tonnes, -11%	Other seabream* (other than gilthead seabream), red mullet, squid, other marine fish*.
Apr 2022 vs Apr 2021	EUR 0,2 million, -16%	34 tonnes, -9%	Other seabream (other than gilthead seabream), swordfish, red mullet, other marine fish*.

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



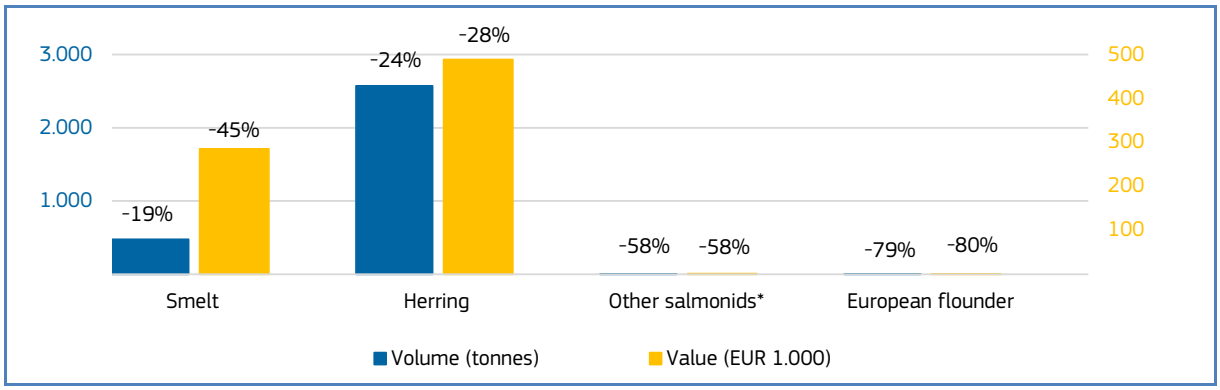
*Percentages show change from the previous year. *EUMOFA aggregation for species*

[3] First-sales data updated on 26.6.2022.

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2022 vs Jan-Apr 2021	EUR 6,4 million, -9%	26.468 tonnes, -10%	Herring, sprat, pike-perch.
Apr 2022 vs Apr 2021	EUR 1,5 million, -12%	4.592 tonnes, -12%	Smelt, herring, other salmonids*, European flounder.

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



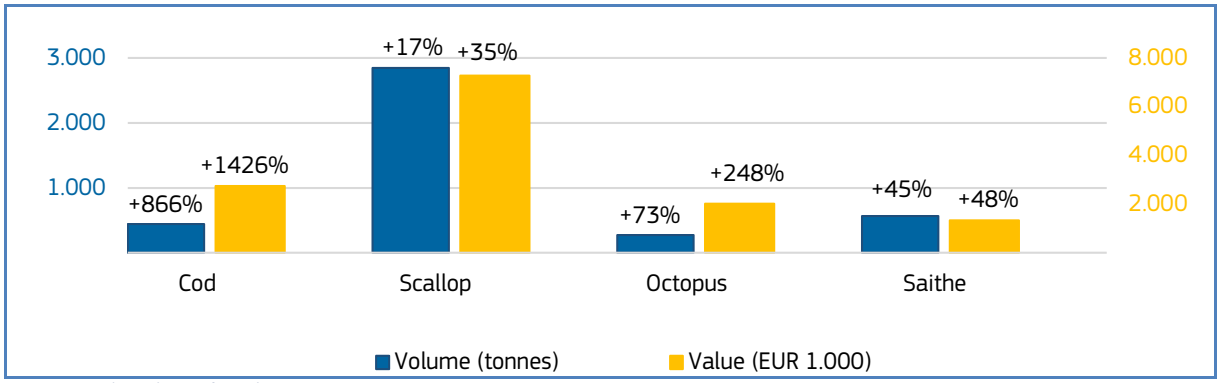
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Apr 2022 vs Jan-Apr 2021	EUR 247,6 million, +14%	70.661 tonnes, 0%	**Value**: Scallop, octopus, squid. **Volume**: Scallop, seaweed and other algae, hake.	In April 2022 compared to April 2021, cod first sales significantly increased. This is explained by the fact that usually, at this time of the year, the supply is landed directly in Norway or in north-westerly countries (such as Germany and the Netherlands) to save fuel costs, while from March-April 2022 the production was landed directly in Saint-Malo. This was due to strong market pressure for cod because of the Russian invasion of Ukraine (which explains the 36% increase in unit price, from EUR 4.53/kg to EUR 6.17/kg). In France, the bulk of the cod production is by vessels registered at the FROM Nord Producers' Organisation[4], particularly the large trawlers from the 'Compagnie des Pêches' (located in Saint-Malo) and Euronor (located in Boulogne-sur-Mer).
Apr 2022 vs Apr 2021	EUR 59,2 million, +14%	18.122 tonnes, 0%	Cod, scallop, octopus, saithe.	

[4] https://www.legifrance.gouv.fr/jorf/id/JORFTEXT000045531080

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

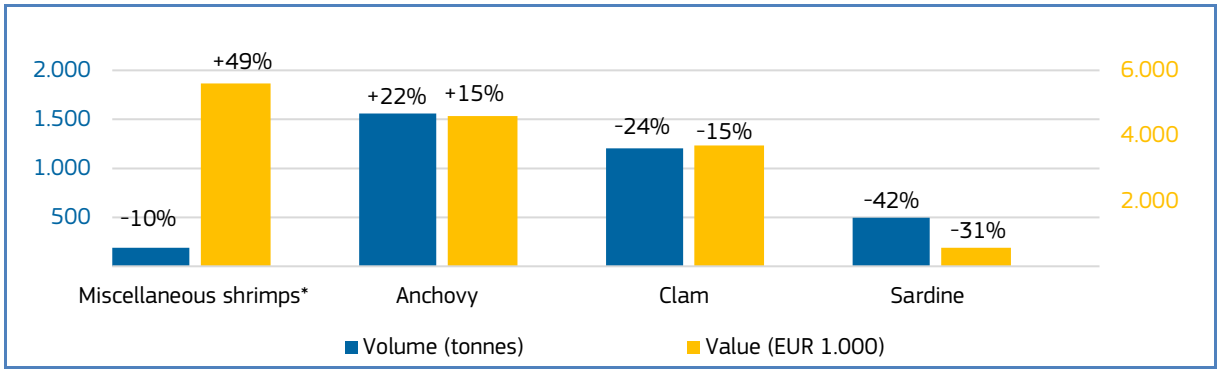


Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2022 vs Jan-Apr 2021	EUR 103,4 million, -2%	21.417 tonnes, -17%	Clam, sardine, cuttlefish, other marine fish*.
Apr 2022 vs Apr 2021	EUR 31,5 million, +11%	6.057 tonnes, -7%	**Value**: Miscellaneous shrimps*, anchovy. **Volume**: Clam, sardine.

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

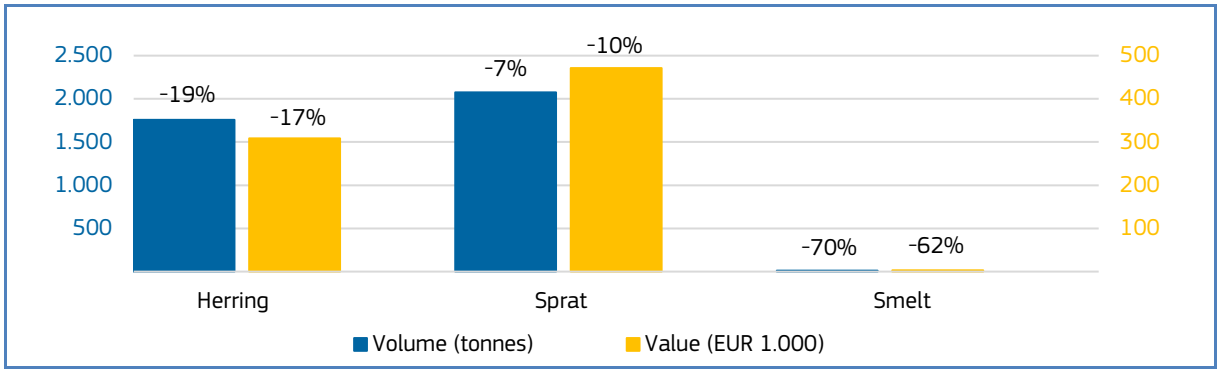


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2022 vs Jan-Apr 2021	EUR 3,5 million, -19%	16.485 tonnes, -21%	Herring, smelt, sprat.
Apr 2022 vs Apr 2021	EUR 0,8 million, -12%	3.969 tonnes, -13%	Herring, sprat, smelt.

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

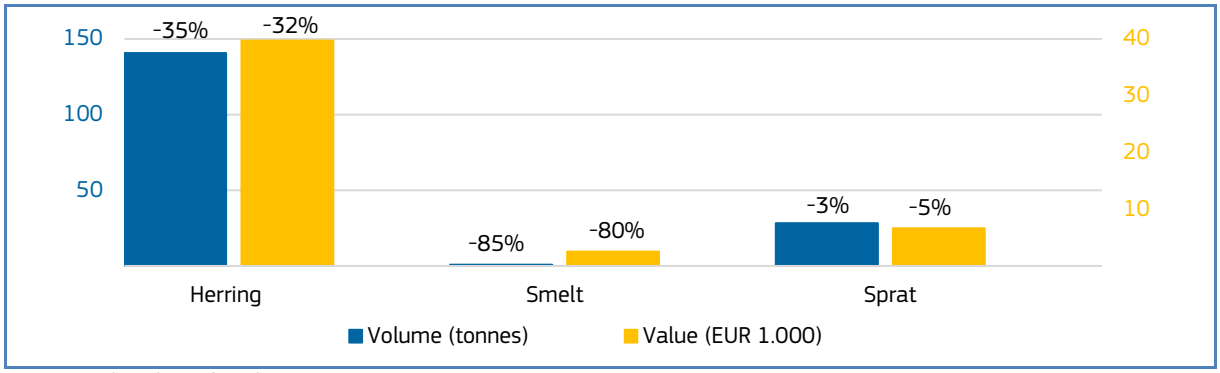


Percentages show change from the previous year.

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species	Notes
Jan-Apr 2022 vs Jan-Apr 2021	EUR 0,4 million, -42%	639 tonnes, -50%	Herring, smelt, sprat.	Smelt had the highest decline in first-sales value and volume in April 2022 compared to April 2021. It is a seasonal species caught by small-scale fishermen. The largest catches occur from November to April. In 2022 April catches of smelt were lower due to lack of supply. As a consequence, sales in the Lithuanian market were reduced. Protein value of smelt in April is lower than in winter.
Apr 2022 vs Apr 2021	EUR 0,05 million, -37%	178 tonnes, -32%	Herring, smelt, sprat.	

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



Percentages show change from the previous year.

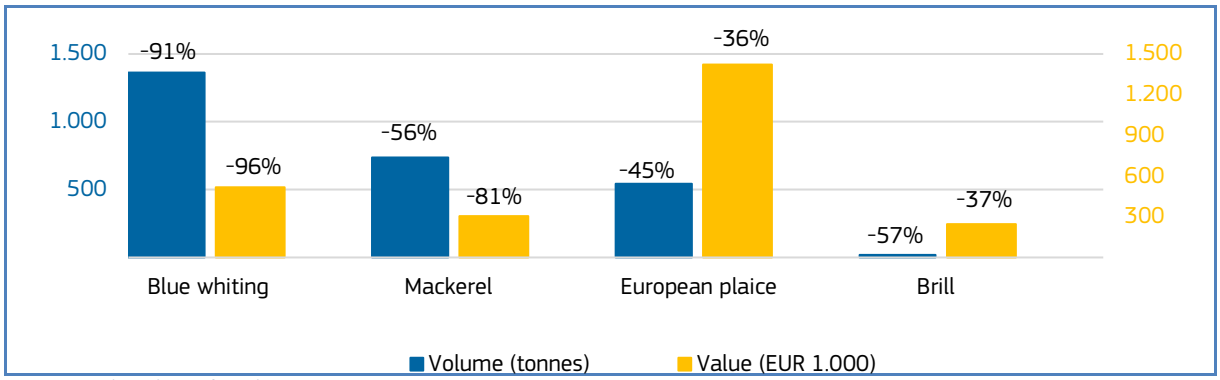
Table 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS**

The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Apr 2022 vs Jan-Apr 2021	EUR 81,2 million, -9%	78.521 tonnes, +19%	**Value**: Blue whiting, mackerel, whiting. **Volume**: Herring, blue whiting, Atlantic horse mackerel.	Mackerel first sales recorded high decreases in April 2022 compared to April 2021. According to ICES[5] (2021), the status of the mackerel stock is good, with spawning-stock size above the maximum sustainable yield. In the Netherlands, the

[5] ICES Advice 2021 – mac.27.nea – https://doi.org/10.17895/ices.advice.7789

Apr 2022 vs Apr 2021	EUR 11,8 million, -54%	4.058 tonnes, -80%	Blue whiting, mackerel, European plaice, brill.	mackerel fishery mostly consists of large freezer trawlers, therefore the monthly production of mackerel is highly variable due to natural fluctuations and changes in fishing strategies (especially the location of fishing, which vary significantly)[6]. The production reported in April 2022 (around 738 tonnes) is down from the 1.659 tonnes observed in April 2021, but remains higher than production levels observed in April 2020 (around 502 tonnes), April 2019 (847 tonnes), and April 2018 (466 tonnes). Therefore, April 2021 appears to be an exception, due mostly to post-Brexit negotiations and the closure of Norwegians waters at the beginning of the year that resulted in a change in fishing strategies.

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



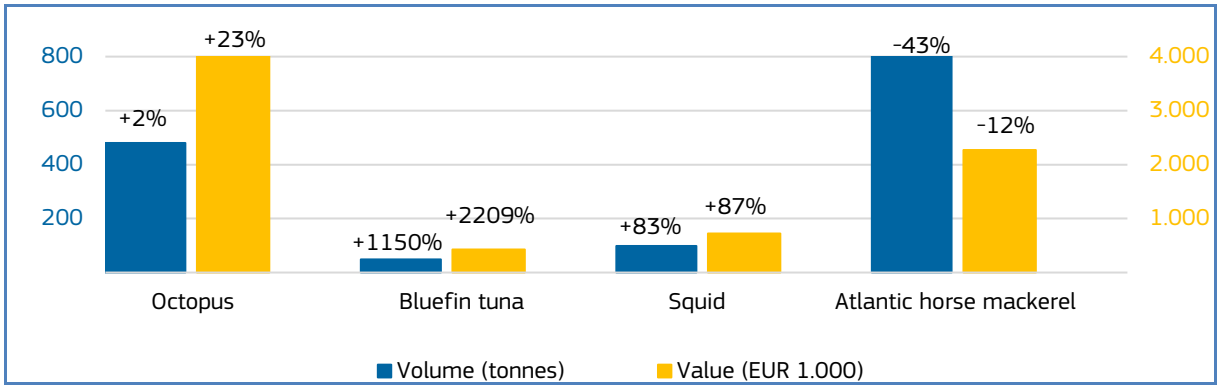
Percentages show change from the previous year.

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

Portugal	**First-sales value / trend %**	**First-sales volume / trend %**	**Main contributing species**
Jan-Apr 2022 vs Jan-Apr 2021	EUR 85,5 million, +18%	20.235 tonnes, -9%	**Value**: Octopus, anchovy, squid. **Volume**: Atlantic horse mackerel, other horse mackerel* (other than Atlantic horse mackerel), clam.
Apr 2022 vs Apr 2021	EUR 21,4 million +1%	5.752 tonnes, -29%	**Value**: Octopus, bluefin tuna, squid. **Volume**: Atlantic horse mackerel, other horse mackerel* (other than Atlantic horse mackerel).

[6] M.A. Pastoors and F.J. Quirijns (2020) PFA self-sampling report 2015-2019. PFA report2020/02. https://www.pelagicfish.eu/01325/

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

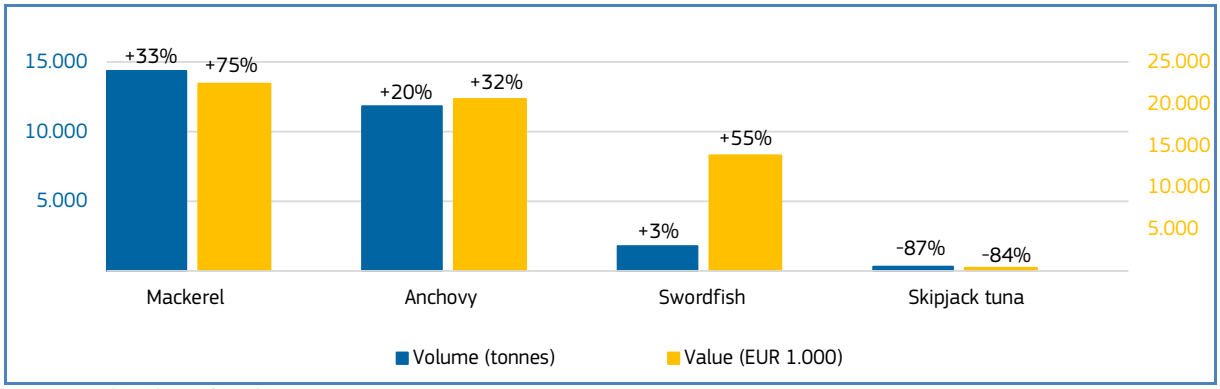


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2022 vs Jan-Apr 2021	EUR 446,1 million, +5%	135.176 tonnes, -14%	**Value**: Mackerel, octopus, swordfish. **Volume**: Anchovy, hake, yellowfin tuna.
Apr 2022 vs Apr 2021	EUR 152,4 million +17%	48.875 tonnes, -3%	**Value**: Mackerel, anchovy, swordfish. **Volume**: Skipjack tuna, squid, bigeye tuna, hake.

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

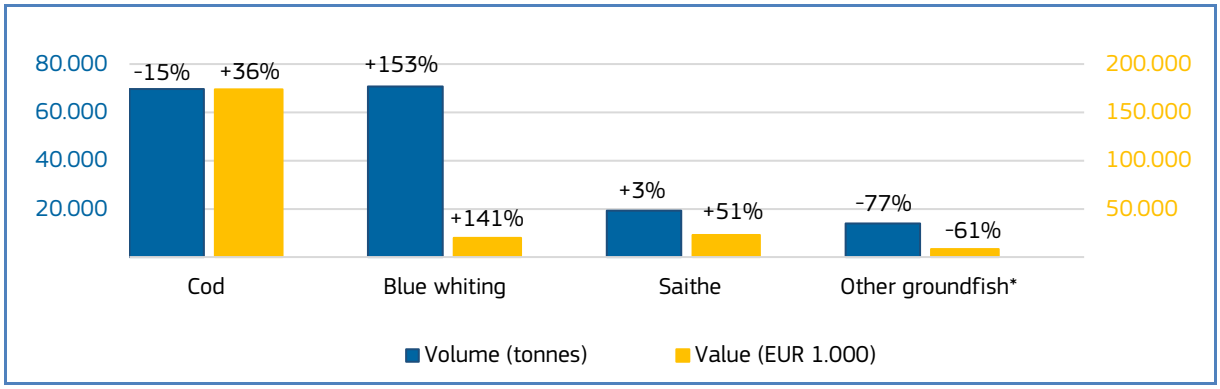


Percentages show change from the previous year.

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Apr 2022 vs Jan-Apr 2021	EUR 1,3 billion, +22%	1.135 million tonnes, -6%	**Value:** Cod, saithe, crab. **Volume:** Other groundfish*, blue whiting, herring.
Apr 2022 vs Apr 2021	EUR 275,5 million +20%	232.721 tonnes, -7%	**Value**: Cod, blue whiting, saithe. **Volume**: Other groundfish*; cod.

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, APRIL 2022**

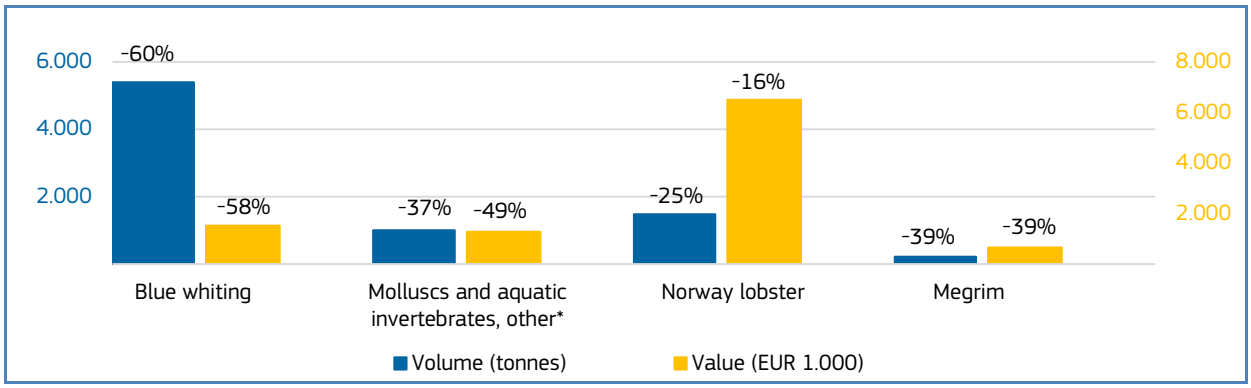


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

The United Kingdom	**First-sales value / trend %**	**First-sales volume / trend %**	**Main contributing species**
Jan-Apr 2022 vs Jan-Apr 2021	EUR 198,8 million, +9%	105.164 tonnes, -6%	**Value**: Monk, mackerel, squid. **Volume**: Blue whiting, other molluscs and aquatic invertebrates*, Norway lobster.
Apr 2022 vs Apr 2021	EUR 37,1 million, -6%	17.277 tonnes, -35%	Blue whiting, other molluscs and aquatic invertebrates*, megrim.

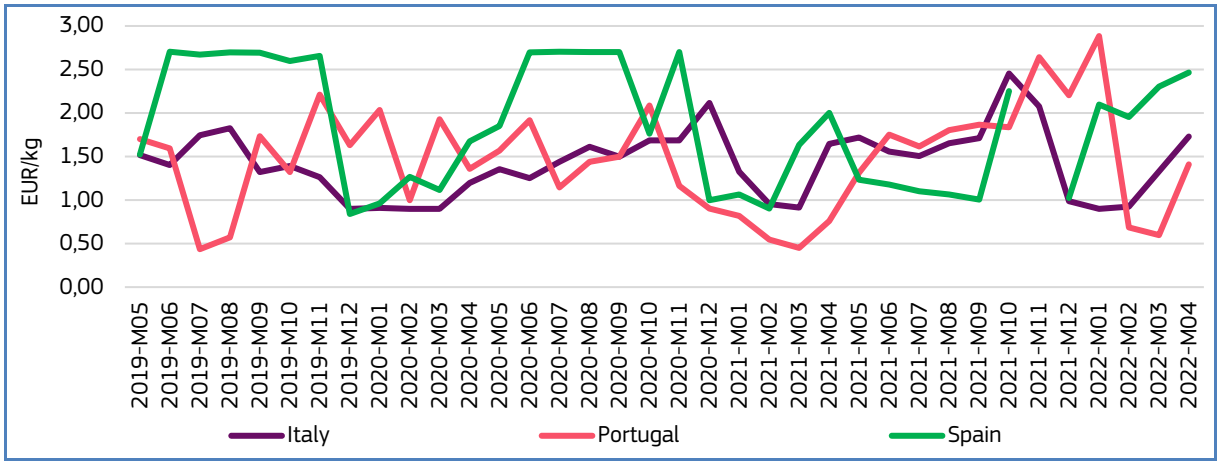
Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, APRIL 2022**



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

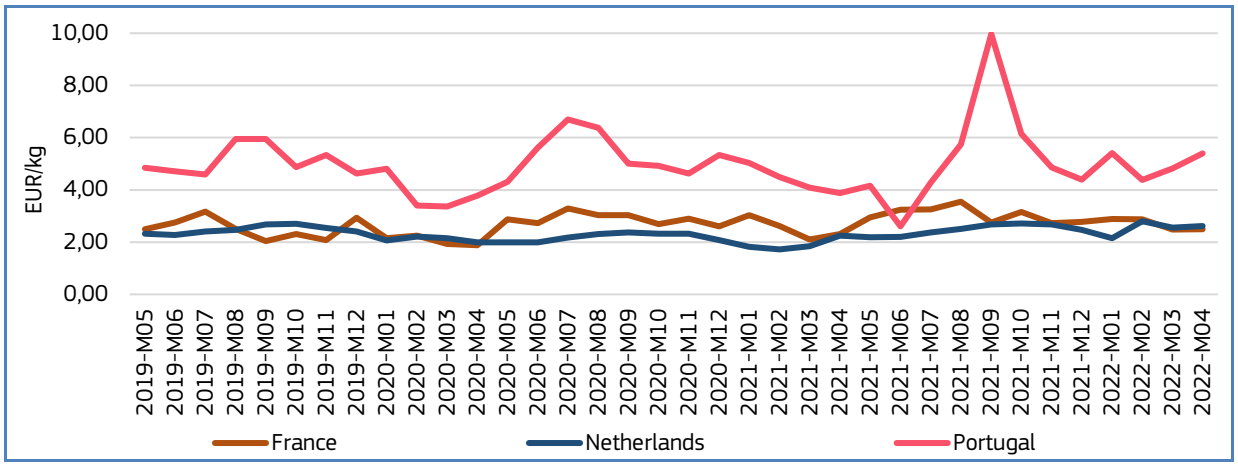
1.4. Comparison of first sales prices of selected species in selected countries[7]

Figure 13. **FIRST-SALES PRICES OF MUSSEL MYTILUS SPP. IN FRANCE, GREECE, AND ITALY**



EU first sales of **mussels (*Mytilus* spp.)** occur in several countries, including **Italy**, **Portugal**, and **Spain**. In April 2022, the average first sales prices of *Mytilus* spp. were 1,73 EUR/kg in Italy (up from both March 2022 and April 2021 by 30% and 5%, respectively); 1,41 EUR/kg in Portugal (up from the previous month by 136%, and up from the previous year by 85%); and 2,46 EUR/kg in Spain (up from the previous month by 7%, and up from the previous year by 23%). In April 2022, supply decreased in both Italy (–73%) and Portugal (–2%), and increased in Spain (+78%), relative to the previous year. Supply is seasonal, with peaks between June and September in Italy; and from February to April, and July to August, in Portugal. Volumes sold in Spain do not seem to exhibit a clear seasonality. Over the past 36 months, *Mytilus* spp. prices showed an upward trend in Italy and Portugal, and the opposite in Spain. At the same time, supply went up in Portugal and Spain, and decreased in Italy.

Figure 14. **FIRST-SALES PRICES OF PLAICE IN FRANCE, NETHERLANDS, AND PORTUGAL**

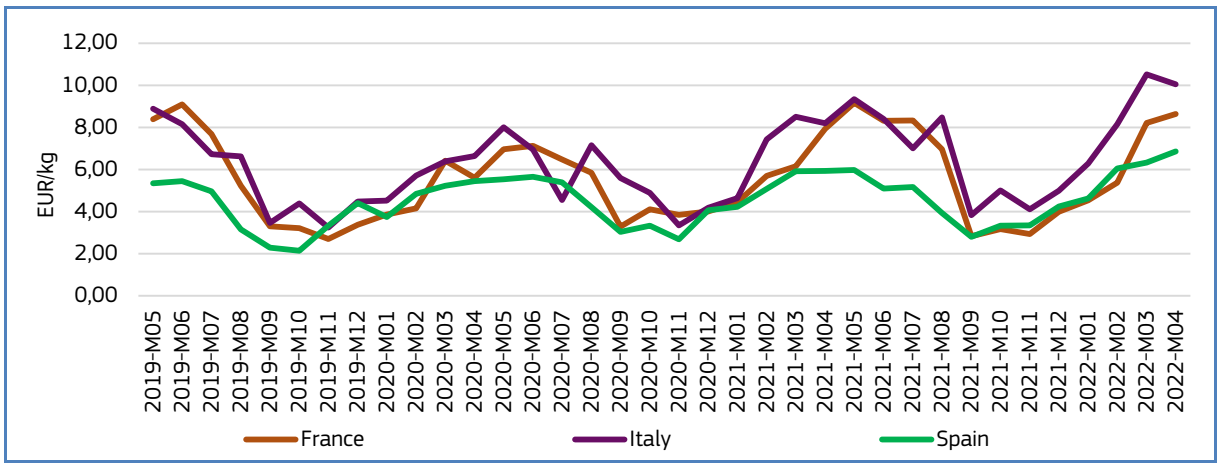


EU first sales of **plaice** occur predominantly in **the Netherlands**, as well as **France** and **Portugal**. In April 2022, the average first-sales prices of plaice were: 2,50 EUR/kg in France (up from both the previous month and year by 1% and 8%, respectively); 2,62 EUR/kg in the Netherlands (up from both March 2022 and April 2021 by 2% and 16%, respectively); and 5,40 EUR/kg in Portugal (up from the previous month by 12%, and up from the previous year by 39%). In April 2022, supply decreased in both France (–14%) and the Netherlands (–45%), and increased in Portugal (+1249%), relative to the previous year. Supply is seasonal, with peaks between March and April, and September and November in France; and in the Netherlands, supply seems to peak in the period from June to July, and December to January. Additionally, volumes sold in Portugal peak in January and February. In Portugal, price in September 2021 peaked at almost 9,97 EUR/kg, which can be linked with low

[7] First sales data updated on 26.06.2022.

supply. In all three national markets, over the 36-month period observed, plaice prices exhibited an upward trend while volume went down.

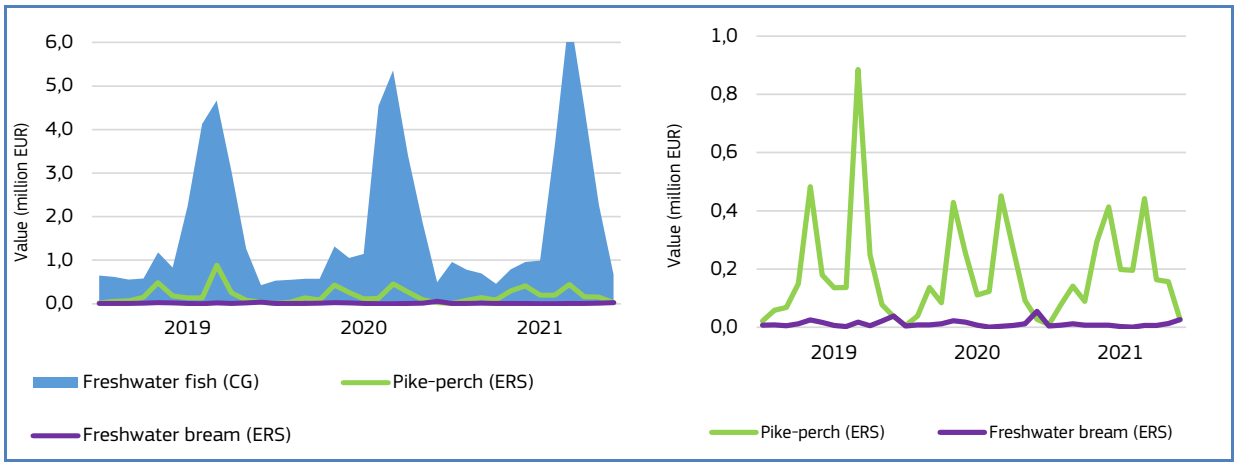
Figure 15. **FIRST-SALES PRICES OF SQUILLID IN FRANCE, ITALY, AND SPAIN**



EU first sales of **squillid** (*Squilla mantis*) occur in a few countries, including **France**, **Italy**, and **Spain**. In April 2022, the average first-sales prices of squillid were 8,64 EUR/kg in France (up from both the previous month and year by 5% and 9%, respectively); 10,05 EUR/kg in Italy (down by 4% from March 2022 and up by 23% from April 2021); and 6,86 EUR/kg in Spain (up by 8% from the previous month and up by 16% from the previous year). In April 2022, supply increased in France (+19%), and decreased in both Italy and Spain (–3% and –15%, respectively), relative to the previous year. Volumes sold in France peak in September; in Italy supply peaks in November–December; and in Spain in November–February. Over the past three years, prices exhibited an upward trend in all three markets; at the same time supply decreased in France and Italy, and remained stable in Spain.

1.5. Commodity group of the month: freshwater fish[8]

Figure 16. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES[9], MARCH 2018 - APRIL 2022**



In April 2022, the "**freshwater fish**" commodity group (CG[10]) recorded the 9th highest value and volume out of the 10 CGs in the countries monitored by EUMOFA[11]. In the reporting countries covered by the EUMOFA database, first sales of "freshwater fish" in April 2022 totalled a value of EUR 0,7 million and a volume of 361 tonnes, representing an increase in value of 36%

[8] First-sales data updated on 16.6.2022.
[9] Norway and the UK excluded from the analyses.
[10] Annex 3: http://eumofa.eu/supply-balance-and-other-methodologies
[11] More data on commodity groups can be found in Table 1.2 of the Annex.

and in volume of 0,3% compared to April 2021. In the past 36 months, the highest first-sales value of freshwater fish was registered at EUR 6,7 million in January 2022.

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

At the Electronic Recording and Reporting System (ERS) level, freshwater bream (4%) and pike-perch (4%) together accounted for 8% of the total first-sales value for "freshwater fish" recorded in April 2022.

1.6. Focus on freshwater bream

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Freshwater bream (*Abramis brama*) is a species of ray-finned fish from the Leuciscidae family. Adults usually occur in still and slow-running waters where they travel in large shoals, while larvae and juveniles live in still water bodies. Their larvae feed on plankton, while adults consume insects, particularly chironomids, small crustaceans, molluscs, and plants. Larger specimens may also eat small fish. Freshwater bream usually spawn in backwaters, floodplains, or lake shores with dense vegetation in late spring and early summer. They are able to survive out of the water for extended periods[12]. Freshwater bream can be observed in waters of Europe and Asia; in most European drainages from Adour (France) to Pechora (White Sea basin); the Aegean Sea basin, in Lake Volvi, and Struma and Maritza drainages. They are naturally absent from the Iberian Peninsula, the Adriatic basin, Italy, Scotland, and areas north of Bergen (Norway) and 67 °N (Finland) in Scandinavia. They are locally introduced in Ireland, Spain, and northeast Italy[13].

Member States of the EU can optionally report on catches of freshwater bream among *Abramis* spp. as stated in a European Commission Regulation[14] As far as species identification is concerned, reporting nominal catches is optional. However, where data for individual species are not submitted, the data shall be included in aggregate categories.

In Europe, freshwater bream is a commercially important food-fish, and is also a valuable fish for anglers[15]. Its flesh is bony, insipid, and soft. It is marketed fresh or frozen and eaten steamed, broiled, fried and baked[16].

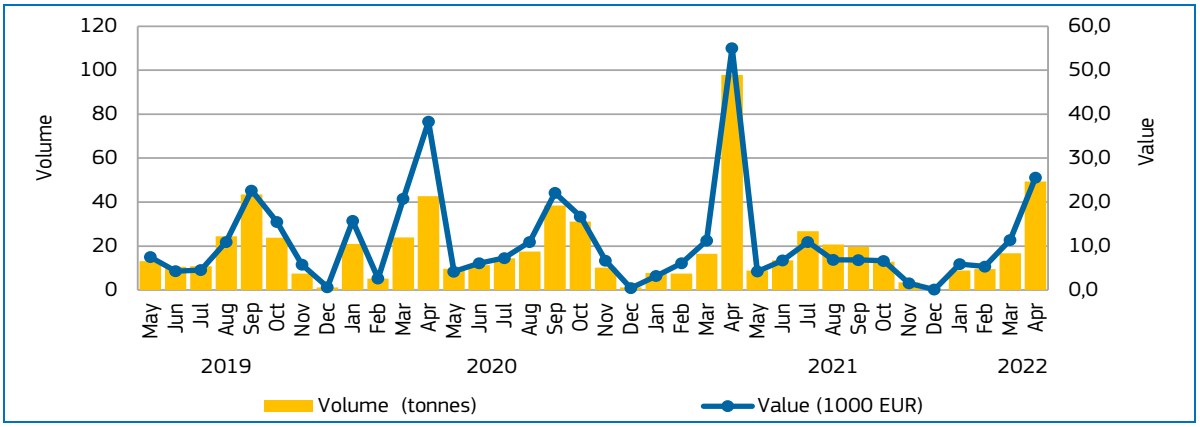
Selected countries

Table 15. **COMPARISON OF FRESHWATER BREAM FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "FRESHWATER FISH" IN SELECTED COUNTRIES**

Freshwater bream		Changes in freshwater bream first sales Jan-Apr 2022 (%)		Contribution of freshwater bream to total "freshwater fish" first sales in April 2022 (%)	Principal places of sale Jan-Apr 2022 in terms of first-sales value
		Compared to Jan-Apr 2021	Compared to Jan-Apr 2020		
Estonia	**Value**	-36%	-38%	6%	Alatskivi, Latikas, Kõrveküla.
	Volume	-35%	-9%	16%	
The Netherlands	**Value**	+75%	-44%	1%	IJmuiden/Velsen, Scheveningen, Stellendam.
	Volume	+95%	-25%	8%	

[12] https://www.marlin.ac.uk/species/detail/2172
[13] https://www.fishbase.de/summary/abramis-brama.html
[14] Regulation (EC) No 218/2009 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:32009R0218
[15] https://www.fao.org/fishery/en/aqspecies/2153/en
[16] https://www.fishbase.de/summary/abramis-brama.html

Figure 17. **FRESHWATER BREAM: FIRST SALES IN ESTONIA, MAY 2019 - APRIL 2022**



Over the past 36 months, the highest first-sales value of freshwater bream in **Estonia** occurred in April 2021, when 98 tonnes were sold for approximately EUR 55.000. In general, first sales were the highest in April each year, while they were low in winter, mainly in December.

Figure 18. **FIRST SALES: COMPOSITION OF "FRESHWATER FISH" (ERS LEVEL) IN ESTONIA IN VALUE AND VOLUME, APRIL 2022**

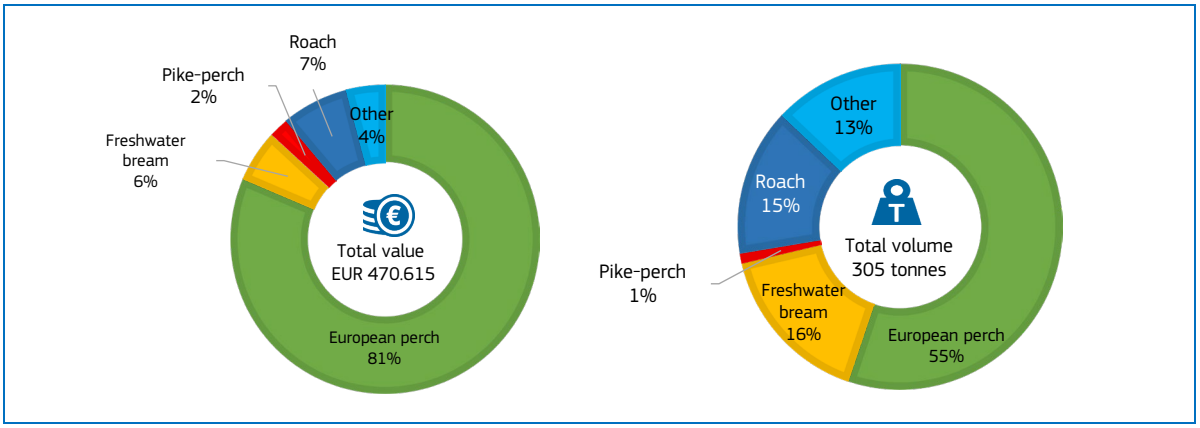
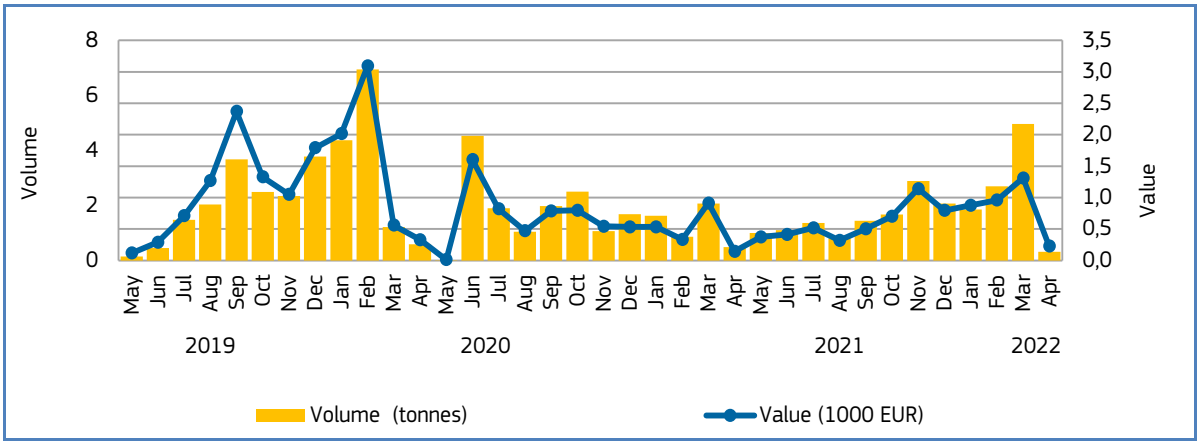
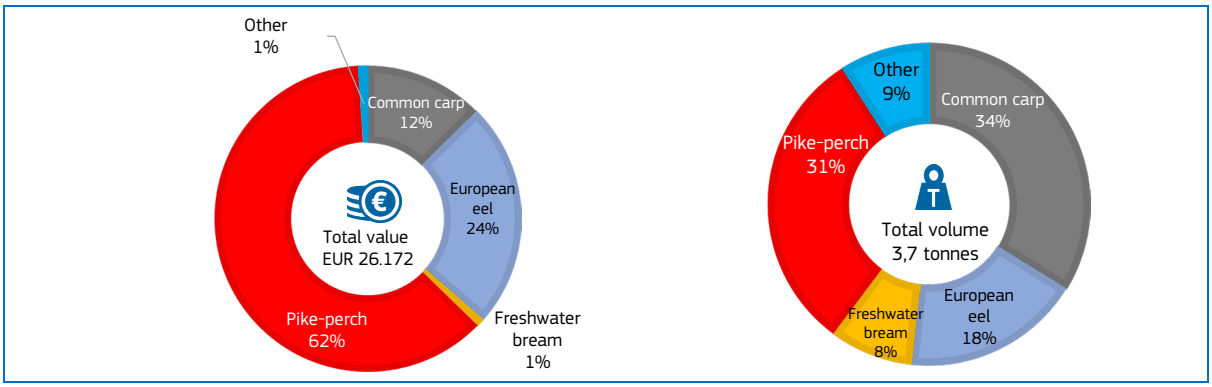


Figure 19. **FRESHWATER BREAM: FIRST SALES IN THE NETHERLANDS, MAY 2019 – APRIL 2022**



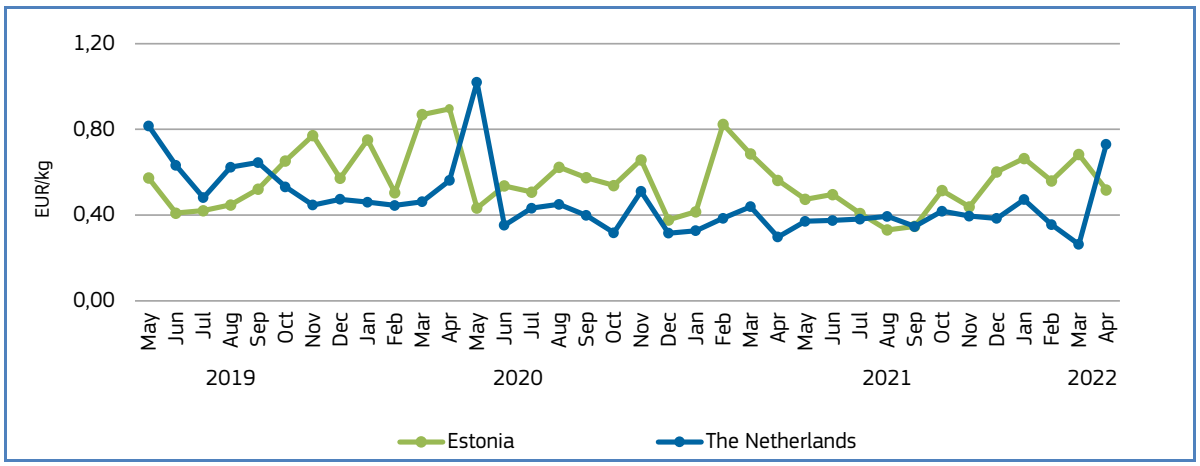
Over the past 36 months in **the Netherlands**, the highest first-sales value and volume of freshwater bream were in February 2020, when 7 tonnes were sold for approximately EUR 3.000. The freshwater bream fishery occurs throughout the year with no major economic importance in terms of value.

Figure 20. **FIRST SALES: COMPOSITION OF "FRESHWATER FISH" (ERS LEVEL) IN THE NETHERLANDS IN VALUE AND VOLUME, APRIL 2022**



Price trend

Figure 21. **FRESHWATER BREAM: FIRST-SALES PRICES IN SELECTED COUNTRIES, MARCH 2019 - APRIL 2022**



Over the 36-month observation period (May 2019 to April 2022), the weighted average first-sales price of freshwater bream in **Estonia** was 0,57 EUR/kg, 34% higher than in **the Netherlands** (0,43 EUR/kg).

In **Estonia,** in April 2022, the average first-sales price of freshwater bream (0,52 EUR/kg) decreased by 8% compared with April 2021, and by 42% compared with April 2020. Over the past 36 months, average price ranged from 0,33 EUR/kg for 20,7 tonnes in August 2021, to 0,90 EUR/kg for 42,8 tonnes in April 2020.

In April 2022 in **the Netherlands,** the average first-sales price of freshwater bream (0,73 EUR/kg) increased by 145% and 30%, compared to the same month of both 2021 and 2020, respectively. During the observed 36-month period, the lowest average price (0,26 EUR/kg for 5 tonnes) was seen in March 2021, while the highest average price (1,02 EUR/kg for 11 kg) was recorded in May 2020.

1.7. Focus on pike-perch

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Pike-perch (*Sander lucioperca*) is a predator fish that belongs to the *Percidae* family. Adults inhabit large, turbid rivers, eutrophic lakes, brackish coastal lakes, and estuaries. They feed mainly on gregarious, pelagic fishes. Spawning usually occurs from April to May, or in exceptional cases from late February until July, when the temperature reaches 10-14 °C on spawning grounds. They spawn in pairs at dawn or night[17].

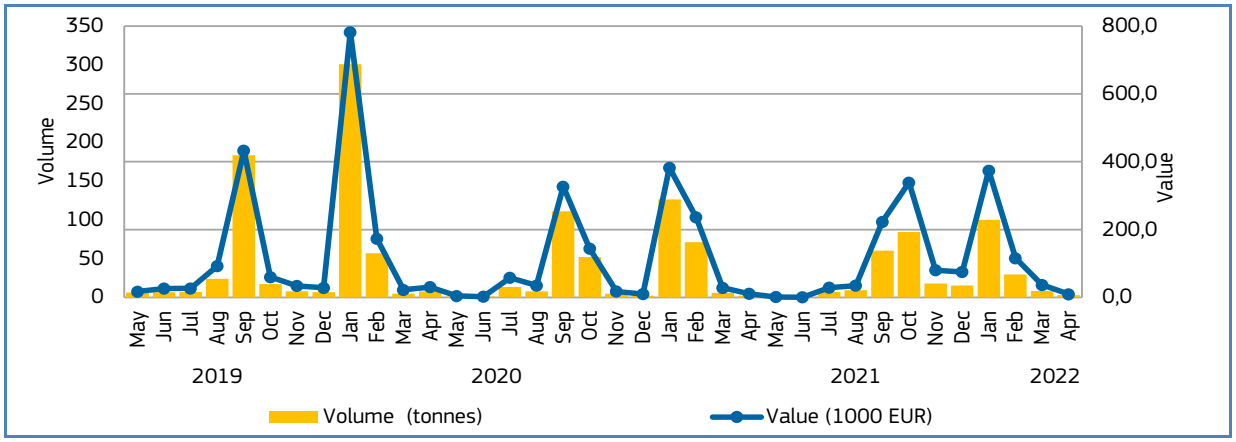
Pike-perch inhabit waters of Europe and Asia, including the Caspian, Baltic, Black, and Aral Sea basins, and the Elbe (North Sea basin) and Maritza (Aegean basin) drainages. The species has been introduced widely across Europe and Asia, though several countries have reported adverse ecological impacts after the introduction[18]. Reporting pike-perch in commercial catch statistics is optional, under a Regulation on the submission of nominal catch statistics of the EU[19]. It is also listed as a vector species of viral haemorrhagic septicaemia and infectious haematopoietic necrosis under a Regulation on the application of certain disease prevention and control rules of the Commission[20]. Pike-perch is a popular fish among sport fishers. Its flesh is succulent and is utilised fresh or frozen, and is eaten steamed, broiled, or microwaved[21].

Selected countries

Table 16. **COMPARISON OF PIKE-PERCH FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "FRESHWATER FISH" IN SELECTED COUNTRIES**

Pike-perch		Changes in pike-perch first sales Jan-Apr 2022 (%)		Contribution of pike-perch to total "freshwater fish" first sales in April 2022 (%)	Principal places of sale in Jan-Apr 2022 in terms of first-sales value
		Compared to Jan-Apr 2021	Compared to Jan-Apr 2020		
Estonia	**Value**	-18%	-47%	2%	Japsi kalasadam, Kadrina Jõgeva mk, Alatskivi.
	Volume	-32%	-62%	1%	
France	**Value**	-25%	+28%	0,7%	Le Grau-du-Roi, St Jean-de-Luz, Agde.
	Volume	-46%	+3%	1%	
The Netherlands	**Value**	+42%	+4%	62%	IJmuiden/Velsen, Stellendam, Scheveningen.
	Volume	-13%	-20%	31%	

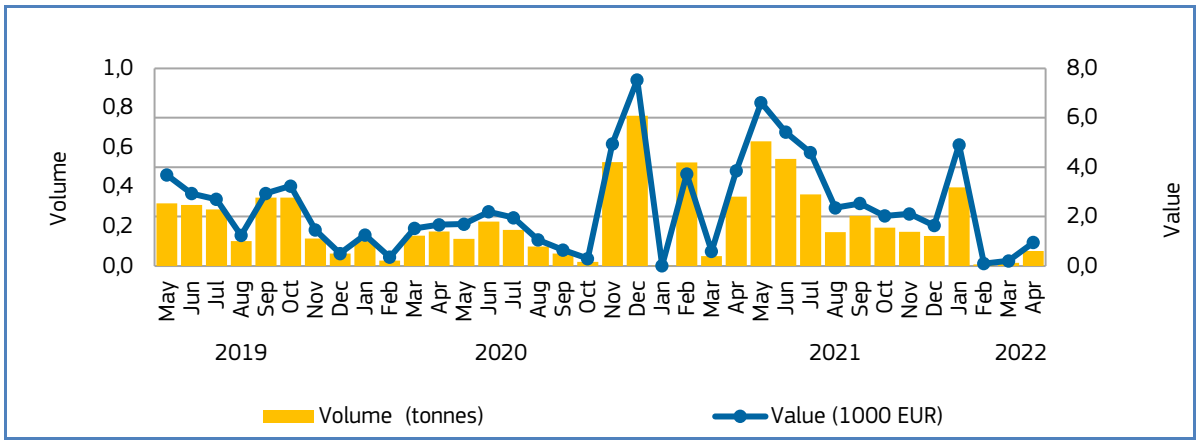
Figure 22. **PIKE-PERCH: FIRST SALES IN ESTONIA, MAY 2019 - APRIL 2022**



[17] https://www.fishbase.se/summary/360
[18] https://www.fishbase.se/summary/360
[19] Regulation (EC) No 218/2009: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32009R0218&qid=1655209174896
[20] Commission Regulation (EU) 2018/1882: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32018R1882&qid=1655209174896
[21] https://www.fao.org/fishery/en/aqspecies/3367/en

In **Estonia**, over the observed 36-month period (May 2019-April 2022), the highest first-sales volume of pike-perch occurred in January 2020, where 301 tonnes were sold for EUR 0,3 million. The lowest sales were observed in May and June 2021, when 303 and 506 kg respectively were sold, respectively.

Figure 23. **PIKE-PERCH: FIRST SALES IN FRANCE, MAY 2019 - APRIL 2022**



In the 36-month observation period in **France**, first sales were the highest in December 2020, when 760 kg tonnes were sold for about EUR 7.500. In general, first sales were lowest in the beginning of the year (January-March each year).

Figure 24. **FIRST SALES: COMPOSITION OF "FRESHWATER FISH" (ERS LEVEL) IN FRANCE IN VALUE AND VOLUME, APRIL 2022**

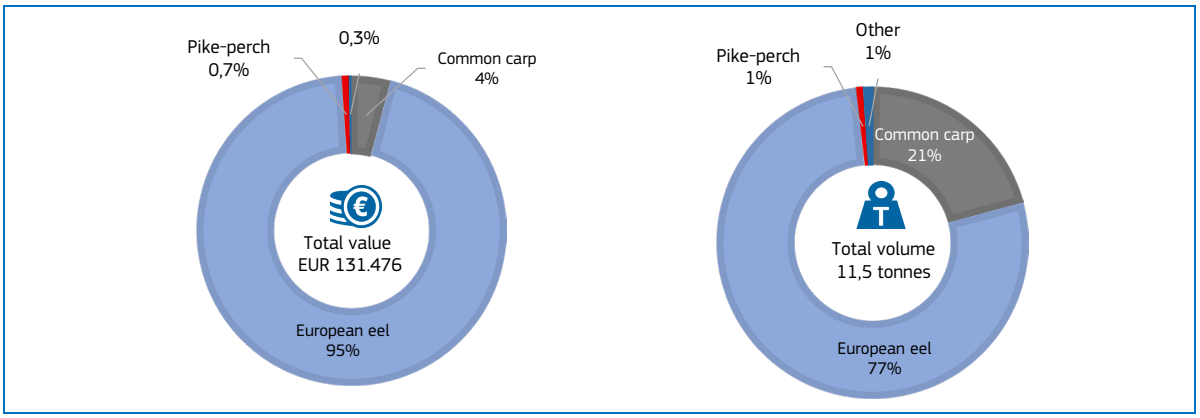
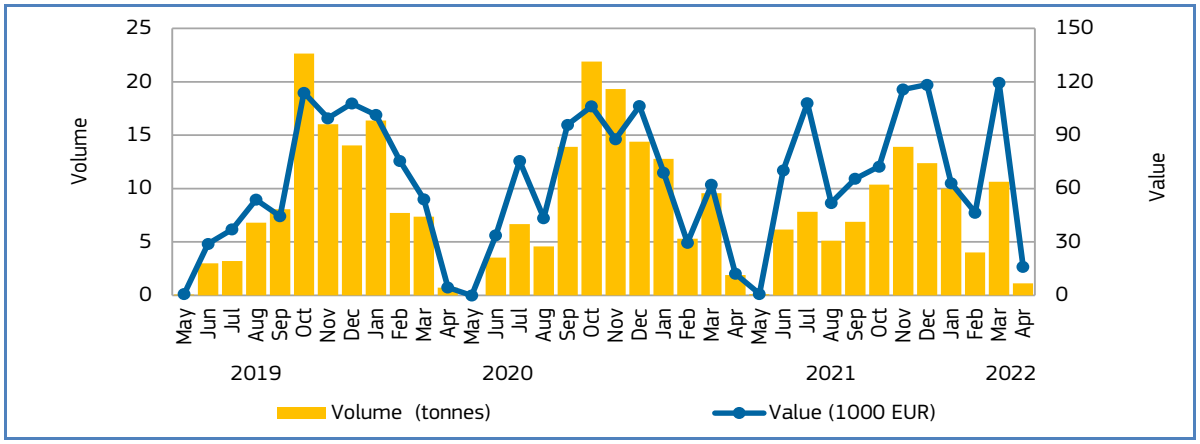


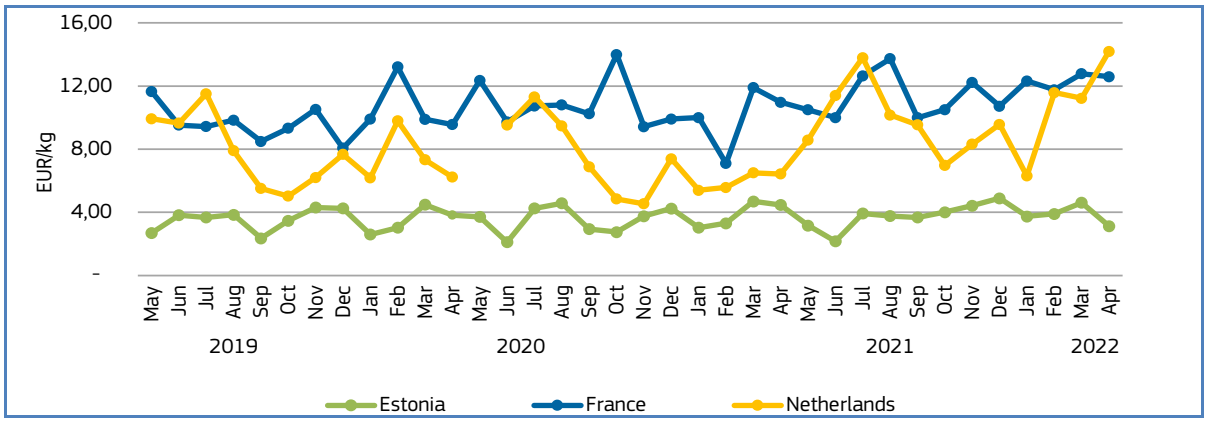
Figure 25. **PIKE-PERCH: FIRST SALES IN THE NETHERLANDS, MAY 2019 - APRIL 2022**



Over the past 36 months in **the Netherlands**, the highest first sales were recorded in Autumn, peaking in October 2019 when 22,6 tonnes were sold. There were low sales in April and May in the previous three years, with zero sales recorded in May 2020.

Price trend

Figure 26. **PIKE-PERCH: FIRST-SALES PRICES IN SELECTED COUNTRIES, MAY 2019 - APRIL 2022**



Over the 36-month observation period (May 2019–April 2022), the weighted average first-sales price of pike-perch in **France** was 10,26 EUR/kg, 226% higher than that of **Estonia** (3,15 EUR/kg), and 38% greater than that of **the Netherlands** (7,43 EUR/kg).

In **Estonia** in April 2022, the average first-sales price of pike-perch (3,13 EUR/kg) decreased by 30% compared to April 2021 and 18% compared to April 2020. The lowest average price was recorded in June 2020 at 2,11 EUR/kg for one tonne, while the highest average price of 4,89 EUR/kg for 15 tonnes was recorded in December 2021.

In **France** in April 2022, the average first-sales price of pike-perch was 12,¸59 EUR/kg, 15% and 32% higher than in April 2021 and 2020, respectively. The lowest price in the past 36 months was recorded in February 2021, at 7,10 EUR/kg for 525 kg. The highest price (14,00 EUR/kg for 21 kg) was recorded in October 2020.

During April 2022 in **the Netherlands**, the average first-sales price of pike-perch was 14,19 EUR/kg, 121% higher than in April 2021 and 128% higher than April 2020. The lowest average price was recorded in November 2020, at 4,54 EUR/kg for 19,3 tonnes. The highest average price of 14,19 EUR/kg for 1,1 tonnes was recorded in April 2022.

EUMOFA also covered **pike-perch** in the following *Monthly Highlights*:
First sales: MH 7 2018 (Denmark, Estonia, Poland), MH 10 2016 (Estonia).

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 "freshwater fish", and the featured species are frozen carp from Myanmar, frozen fillets of Nile perch from Tanzania, and frozen fillets of tilapia from China. The three randomly selected species this month are fresh or chilled lesser or Greenland halibut from Norway, fresh or chilled plaice from Iceland, and frozen squid from Morocco.

Data analysed in the section "extra-EU imports" are extracted from EUMOFA, as collected from the European Commission[22].

Table 17. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THE THREE MOST IMPORTED FISHERIES AND AQUACULTURE PRODUCTS INTO THE EU**

Extra-EU Imports		Week 22/2022	Preceding 4-week average	Week 22/2021	Notes
Fresh whole **Atlantic salmon** imported from **Norway** (*Salmo salar*, CN code 03021400)	**Price (EUR/kg)**	9,44	8,70 (+8%)	5,69 (+66%)	There has been an upward trend in price since week one of 2022, in line with the trend over the past three years. Prices ranged from 4,32 (week 44 of 2020) to 11,43 EUR/kg (week 16 of 2022), which is the highest observed price in the past three years.
	Volume (tonnes)	9.793	11.945 (–18%)	11.957 (–18%)	Volumes ranged from 5.672 (week 15 of 2022) to 19.435 tonnes (week 50 of 2020) and exhibited a downward trend over the past three years. Since week one of 2022 weekly volumes showed a downward trend.
Frozen **Alaska pollock** fillets imported from **China** (*Theragra chalcogramma*, CN code 03047500)	**Price (EUR/kg)**	3,51	3,38 (+4%)	2,56 (+37%)	Over the past three years, including 2022, weekly prices showed an upward trend. Prices ranged from 2,26 (week 52 of 2020) to 3,59 EUR/kg (week 21 of 2022).
	Volume (tonnes)	1.855	1.673 (+11%)	1.527 (+21%)	Weekly volumes fluctuated from 345 tonnes (week 52 of 2019) to 5.433 tonnes (week one of 2020) over the past three years, following a downward trend, which was in line with the 2022 trend.
Frozen **tropical shrimp** imported from **Ecuador** (genus *Penaeus*, CN code 03061792)	**Price (EUR/kg)**	6,12	6,19 (–1%)	5,47 (+12%)	Weekly prices were stable in 2022, in line with the stable trend over the past three years. Prices ranged from 4,27 (week 38 of 2020) to 6,56 EUR/kg (week 49 of 2021).
	Volume (tonnes)	3.476	3.493 (-0,5%)	1.476 (+136%)	Volumes increased in an upward trend in 2022, consistent with the trend over the past three years. Weekly volumes fluctuated from 713 tonnes (week six of 2020) to 4.925 tonnes (week 33 of 2021).

[22] Last update: 27.06.2022

Figure 27. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY, 2019 - 2022**

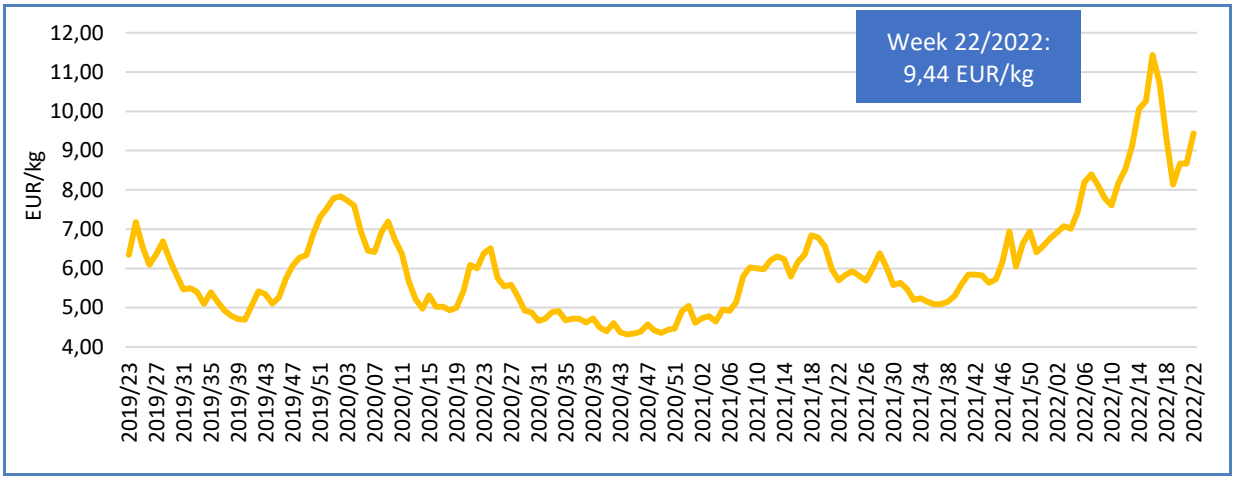


Figure 28. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2019 - 2022**

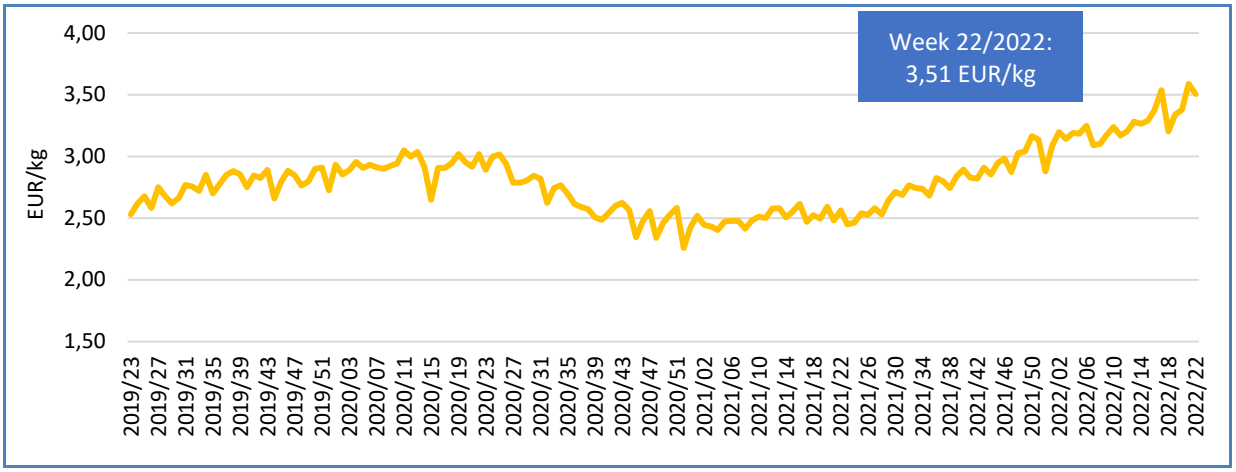


Figure 29. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2019 - 2022**

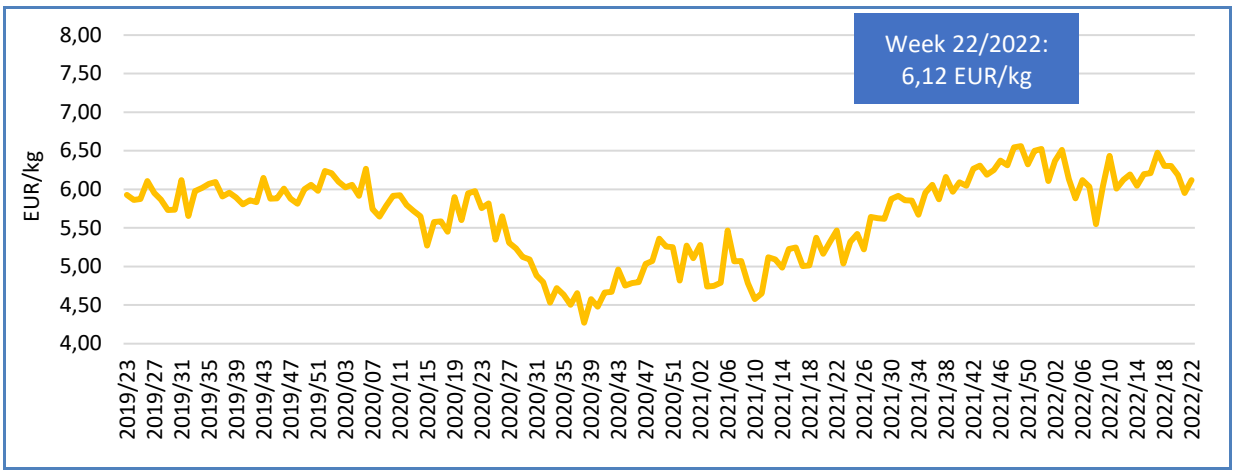


Table 18. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 22/2022	Preceding 4-week average	Week 22/2021	Notes
Frozen **carp** imported from **Myanmar** (*Cyprinus* spp., *Carassius* spp., *Ctenopharyngodon idellus*, *Hypophthalmichthys spp.*, *Cirrhinus* spp., *Mylopharyngodon piceus*, *Catla catla*, *Labeo* spp., *Osteochilus hasselti*, *Leptobarbus hoeveni*, *Megalobrama* spp, CN code 03032500)	**Price (EUR/kg)**	2,56	2,46 (+4%)	2,37 (+8%)	Price has followed an upward trend over the past three years. Prices fluctuated from 1,02 EUR/kg (week 28 of 2019) to 5,59 EUR/kg (week 43 of 2020). Some price spikes correlated with a drop in supply from the previous week; 49% of the weekly prices were under 2,00 EUR/kg.
	Volume (tonnes)	71	47 (+50%)	35 (+99%)	The volume has been relatively stable over the past three years, with high fluctuations in supply from four tonnes (week three of 2021) to 3.417 tonnes (week 20 of 2021). Most of the weekly supply was less than 100 tonnes.
Frozen fillets of **Nile perch** imported from **Tanzania** (**CN code** 03046300)	**Price (EUR/kg)**	6,90	6,99 (–1%)	5,73 (+20%)	From 2019 to 2022, price saw an upward trend. Prices fluctuated from 2,73 (week 41 of 2019) to 7,90 EUR/kg (week 17 of 2022). Some price spikes correlated with a drop in supply from the previous week, and 50% of the weekly prices were between 3,00 and 5,00 EUR/kg.
	Volume (tonnes)	94	137 (–31%)	24 (+293%)	Volume followed an overall downward trend from 2019 to 2022, with high fluctuations in supply, varying between two tonnes (week 25 of 2020) and 680 tonnes (week 29 of 2019). 65% of the weekly volumes were less than 100 tonnes.
Frozen fillets of **tilapia** imported from **China** (**CN code** 03046100)	**Price (EUR/kg)**	4,38	4,30 (+2%)	2,27 (+93%)	Over the past three years there has been an upward trend in prices, which ranged from 1,67 (week 49 of 2020) to 4,57 EUR/kg (week 17 of 2022). 60% of the weekly prices were from 2,00 to 3,00 EUR/kg.
	Volume (tonnes)	235	198 (+19%)	252 (–7%)	Volume has followed a downward trend over the past three years, with fluctuations in supply from 16 tonnes (week 11 of 2021) to 603 tonnes (week 44 of 2019). 64% of the weekly volumes were less than 100 tonnes.

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

Figure 30. **IMPORT PRICE OF FROZEN CARP FROM MYANMAR, 2019 - 2022**

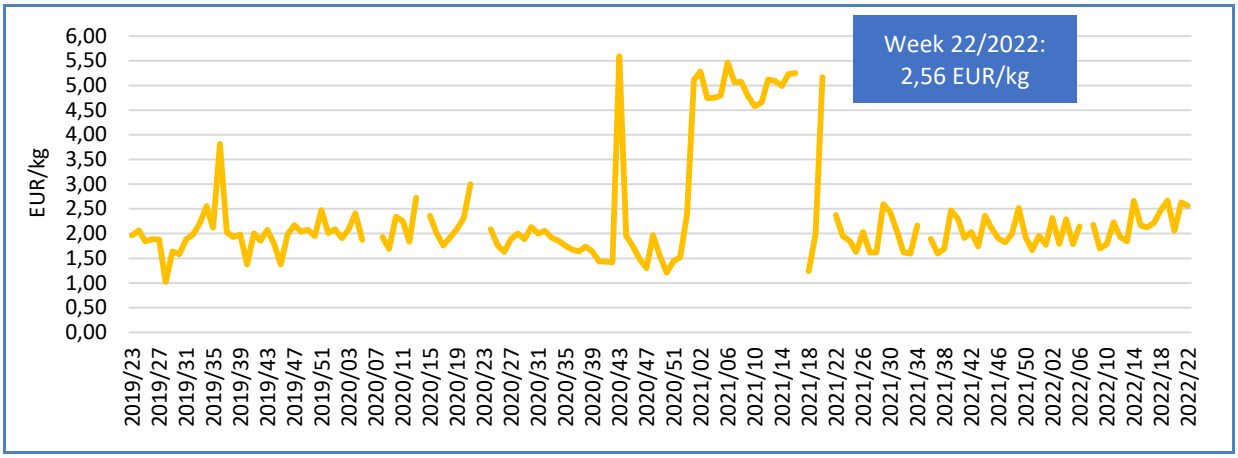


Figure 31. **IMPORT PRICE OF FROZEN FILLETS OF NILE PERCH FROM TANZANIA, 2019 - 2022**

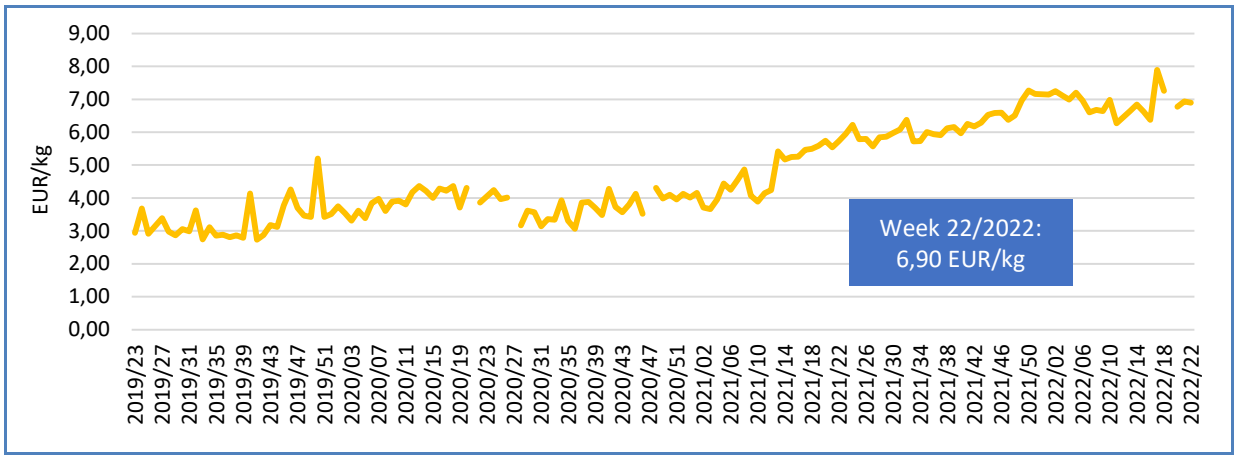
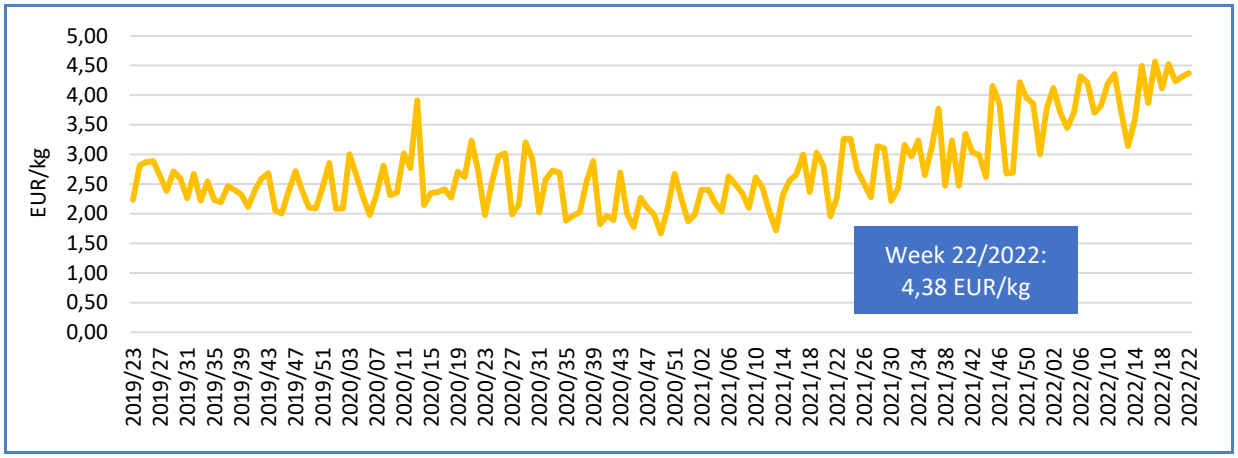


Figure 32. **IMPORT PRICE OF FROZEN FILLETS OF TILAPIA FROM CHINA, 2019 - 2022**



In 2022, the price of frozen **carp** from **Myanmar** exhibited an upward trend. At the same time, volume showed a downward trend. Price ranged from 1,69 to 2,67 EUR/kg, and volume from 8 to 100 tonnes.

Since the beginning of 2022, the price of frozen fillets of **Nile perch** from **Tanzania** has been relatively stable, while volume decreased. Price ranged from 6,27 to 7,90 EUR/kg, and supply from 6 to 207 tonnes.

In 2022, the price of frozen **tilapia** fillets from **China** increased, while the volume decreased. Price ranged from 3,14 to 4,57 EUR/kg, and volume from 19 to 443 tonnes.

Table 19. **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 22/2022	Preceding 4-week average	Week 22/2021	Notes
Fresh or chilled lesser or **Greenland halibut** imported from **Norway** (*Reinhardtius hippoglossoides*, CN code 03022110)	**Price (EUR/kg)**	4,60	5,07 (–9%)	3,66 (+26%)	Stable trend from 2019 to 2022. Prices fluctuated from 2,61 (week 17 of 2020) to 7,85 EUR/kg (week 21 of 2020); 53% of the weekly prices were between 4,00 and 5,00 EUR/kg.
	Volume (tonnes)	40	16 (+149%)	35 (+14%)	High fluctuations in supply, varying from 0,020 (week one of 2020) to 137 tonnes (week 32 of 2020). Overall stable trend; 62% of the weekly volumes were less than 10 tonnes.
Fresh or chilled **plaice** imported from **Iceland** (*Pleuronectes platessa*, CN code 03077210)	**Price (EUR/kg)**	4,32	3,43 (+26%)	3,24 (+34%)	Upward trend over the past three years. Price fluctuations, varying from 1,68 (week 19 of 2020) to 14,85 EUR/kg (week 52 of 2020). Price spikes correlated with a drop in supply from the previous week; 81% of the weekly prices were less than 4,00 EUR/kg.
	Volume (tonnes)	116	203 (–43%)	76 (+52%)	Upward trend over the past three years. Fluctuations in supply from 0,15 (week 15 of 2020) to 289 tonnes (week 18 of 2022); 75% of the weekly volumes were less than 100 tonnes.
Frozen **squid** imported from **Morocco** (*Loligo vulgaris*, CN code 03074331)	**Price (EUR/kg)**	12,10	12,20 (–1%)	8,54(+42%)	Upward trend from 2019 to 2022. Prices ranged from 6,15 (week 37 of 2020) to 12,44 EUR/kg (week 21 of 2022). 86% of the weekly prices were less than 10,00 EUR/kg.
	Volume (tonnes)	88	173 (–49%)	284(–69%)	From 2019 to 2022 volumes fluctuated from five (week 17 of 2020) to 1.112 tonnes (week 11 of 2021). Overall upward trend; 55% of the weekly volumes were less than 300 tonnes.

**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 33. **IMPORT PRICE OF FRESH OR CHILLED LESSER OR GREENLAND HALIBUT FROM NORWAY, 2019 - 2022**

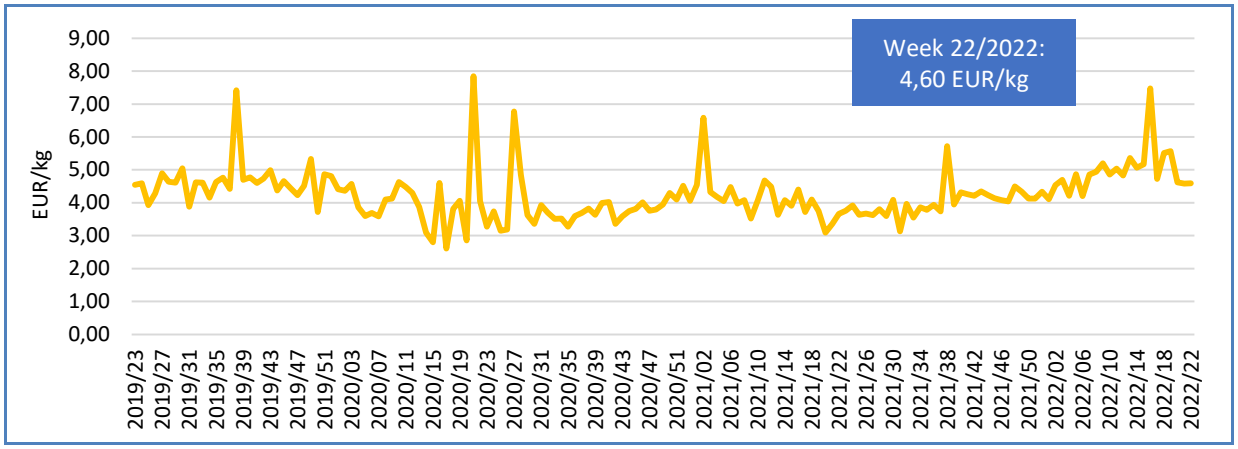


Figure 34. **IMPORT PRICE OF FRESH OR CHILLED PLAICE FROM ICELAND, 2019 - 2022**

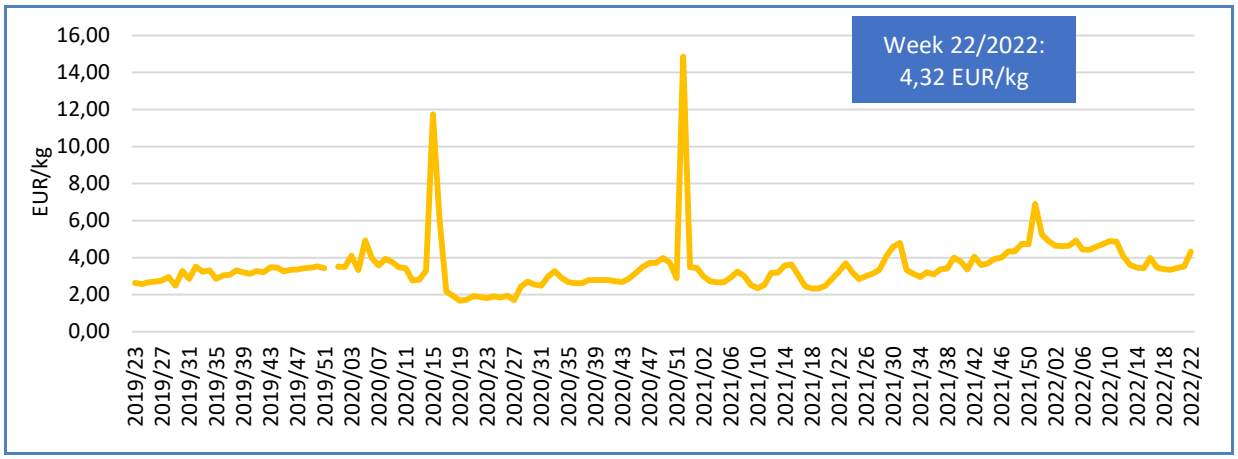
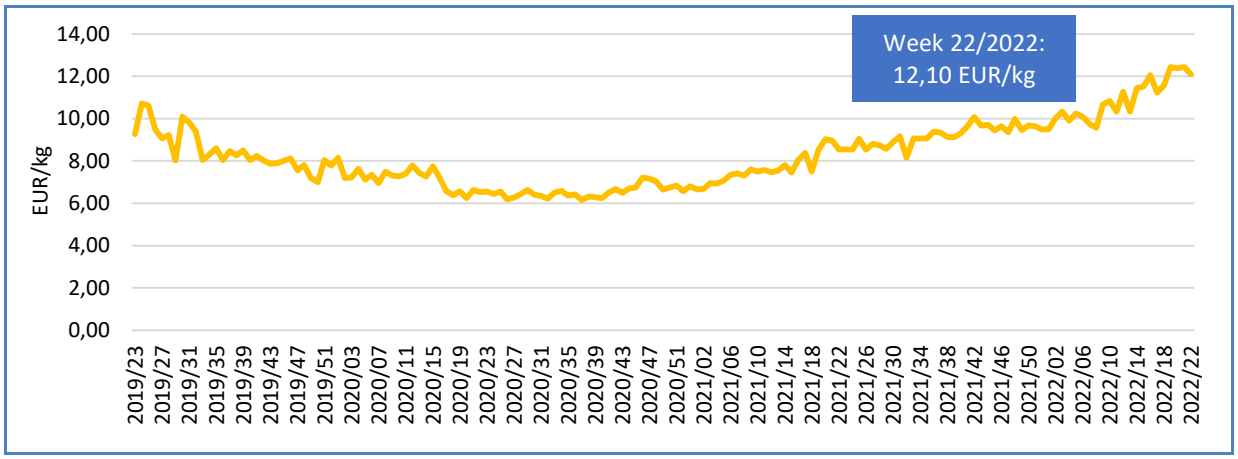


Figure 35. **IMPORT PRICE OF FROZEN SQUID FROM MOROCCO, 2019 - 2022**



Price and volume of fresh or chilled lesser or **Greenland halibut** from **Norway** exhibited a stable trend in 2022. Price ranged from 4,11 to 7,47 EUR/kg and weekly supply from 0,3 to 40 tonnes.

Since the beginning of the year, price of fresh or chilled **plaice** from **Iceland** had a downward trend. At the same time weekly supply went up. Price ranged from 3,35 to 4,92 EUR/kg and supply from four to 289 tonnes.

In 2022, price of frozen **squid** from **Morocco** exhibited an upward trend, while volume showed an opposite trend. Price ranged from 9,51 to 12,44 EUR/kg and supply from 77 to 287 tonnes.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[23].

In April 2022 compared with April 2021, household consumption of fresh fisheries and aquaculture products decreased in both volume and value in most of the MS analysed. Only in Hungary and the Netherlands did volume decrease while value increased.

The value increase in the Netherlands was mainly due to mussels *Mytilus* spp. (increase by 171% in volume and 285% in value, respectively), which was still not enough to compensate for drops in volumes of other species. The highest drops in household consumption were observed in Ireland and Spain. In Ireland, mackerel (-36% in volume, -27% in value) and shrimp (-32% in volume, -29% in value) were the main contributors to the observed decrease. In the Netherlands, European seabass (-43% in volume, -40% in value) and tuna (-36% in volume, -29% in value) had the highest share in the decrease.

Table 20. **APRIL 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	April 2020		April 2021		March 2021		April 2022		Change from April 2021 to April 2022	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	42,56	1.304	21,76	1.229	20,16	1.042	18,31	1.058	19,75	▼ 14%	▼ 2%
Germany	13,08	6.937	113,74	7.118	109,21	6.369	103,62	6.344	104,63	▼ 11%	▼ 4%
Hungary	6,28	413	2,17	344	1,81	267	2,06	305	1,86	▼ 11%	▲ 3%
Ireland	25,50	960	18,59	1.488	22,32	1.204	18,64	1.056	16,90	▼ 29%	▼ 24%
Italy	31,21	19.753	207,52	25.332	269,07	27.793	317,56	21.346	241,86	▼ 16%	▼ 10%
Netherlands	20,60	2.718	49,64	2.689	46,81	2.880	51,39	2.493	50,40	▼ 7%	▲ 8%
Poland	13,11	3.110	19,99	3.937	27,29	4.186	29,46	3.563	27,10	▼ 9%	▼ 1%
Portugal	59,91	5.690	39,25	6.441	44,40	4.335	32,19	4.808	35,40	▼ 25%	▼ 20%
Spain	46,02	59.159	496,98	52.520	461,94	43.517	388,34	39.082	351,41	▼ 26%	▼ 24%
Sweden	25,16	951	12,25	910	11,78	457	6,65	802	11,40	▼ 12%	▼ 3%

**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/*

Over the past three years, the average household consumption of fresh fisheries and aquaculture products in April has been above the annual average in both volume and value in Denmark, Germany, Ireland, and Spain. In Hungary, Italy, the Netherlands, Poland, and Portugal, both volume and value of consumption has been below the average in the same period.

[23] Last update: 01.07.2022

The most recent weekly consumption data (up to **week 28 of 2022**) are available on the EUMOFA website and can be accessed **here**.

3.2. Gilthead seabream

Habitat: A subtropical species from the family of *Sparidae*, living in marine or brackish waters. They are demersal, occupying a depth range of 1–150 m[24].
Catch area: Mediterranean and Black seas, Northeastern Atlantic[25].
Aquaculture production areas: Greece, Italy, Spain.
Production method: Caught and farmed.
Main consumers in the EU: Italy, Greece, Spain.
Presentation: Whole.
Preservation: Fresh, chilled.
Ways of preparation: Grilled, baked.

3.2.1. Overview of household consumption in Italy, Portugal, and Spain

Gilthead seabream is among the five most consumed fresh fisheries and aquaculture products in Italy, Portugal, and Spain. In Italy, where gilthead seabream is the most consumed fresh species, its consumption reached a five-year peak in 2021, in terms of both value and volume.

Italy, Portugal, and Spain are among the countries with the highest per capita consumption of fisheries and aquaculture products in the EU. In 2019, Portugal registered the highest per capita consumption in the EU, 59,91 kg, more than two times the EU average of 23,97 kg. Spain registered per capita consumption of 46,02 kg, 23% lower than Portugal and 92% higher than the EU average. In Italy, the per capita consumption was 31,21 kg, 32% lower than in Spain. See more on EU per capita consumption in Table 23.

During the period January 2015–April 2018, retail prices of fresh gilthead seabream registered highest in Italy. Volume saw considerable monthly variations in Italy and Spain, but it registered bigger sales compared with Portugal, where volumes sold were five times lower, but remained relatively stable.

We have covered **gilthead seabream** in previous *Monthly Highlights*:

First Sales: France 3/2021, Portugal 3/2021, Spain 3/2021.

Consumption: France 7/2018, Greece 6/2016, 9/2015, 2/2015, Italy 7/2018, 6/2016, 9/2015, 2/2015, Portugal 7/2018, 6/2016, 2/2015, Spain 7/2018, 6/2016, 9/2015, 2/2015.

Extra-EU Imports: Turkey 3/2022, 9/2021, 3/2020, 8/2019, 6/2018.

Topic of the month: Seabass and seabream in Greece 9/2017, Gilthead seabream in Italy 3/2014

[24] https://www.fishbase.se/summary/1164
[25] https://www.eumofa.eu/documents/20178/110994/MH+2+2018.pdf

Figure 36. **PRICES OF GILTHEAD SEABREAM PURCHASED BY ITALIAN, PORTUGUESE, AND SPANISH HOUSEHOLDS**

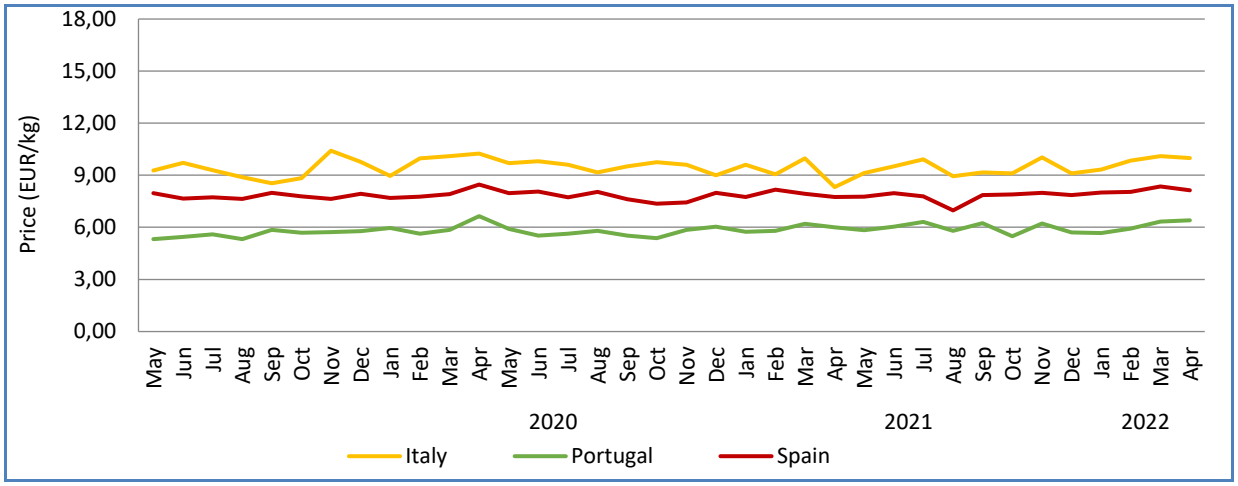
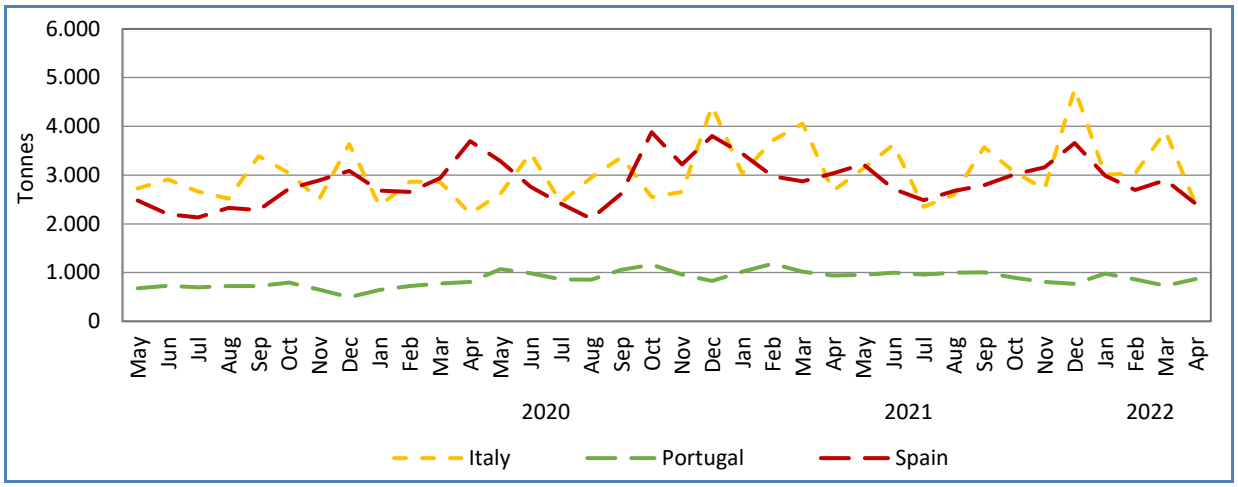


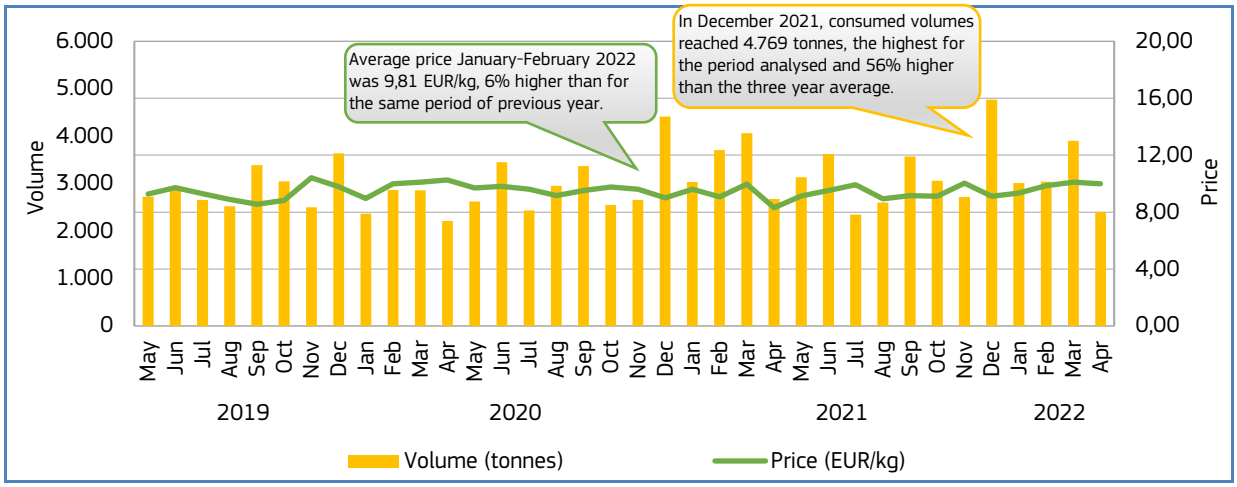
Figure 37. **HOUSEHOLD PURCHASES OF GILTHEAD SEABREAM IN ITALY, PORTUGAL, AND SPAIN**



3.2.2. Household consumption trends in Italy

Long-term trend (May 2019 to April 2022): Relatively stable prices and upward trend in volume.
Yearly average price: 9,25 EUR/kg (2019), 9,62 EUR/kg (2020), 9,32 EUR/kg (2021).
Yearly consumption: 34.589 tonnes (2019), 34.756 tonnes (2020), 39.296 tonnes (2021).
Short-term trend (January to April 2022): Upward trend in price and downward trend in volume.
Price: 9,81 EUR/kg.
Consumption: 12.345 tonnes.

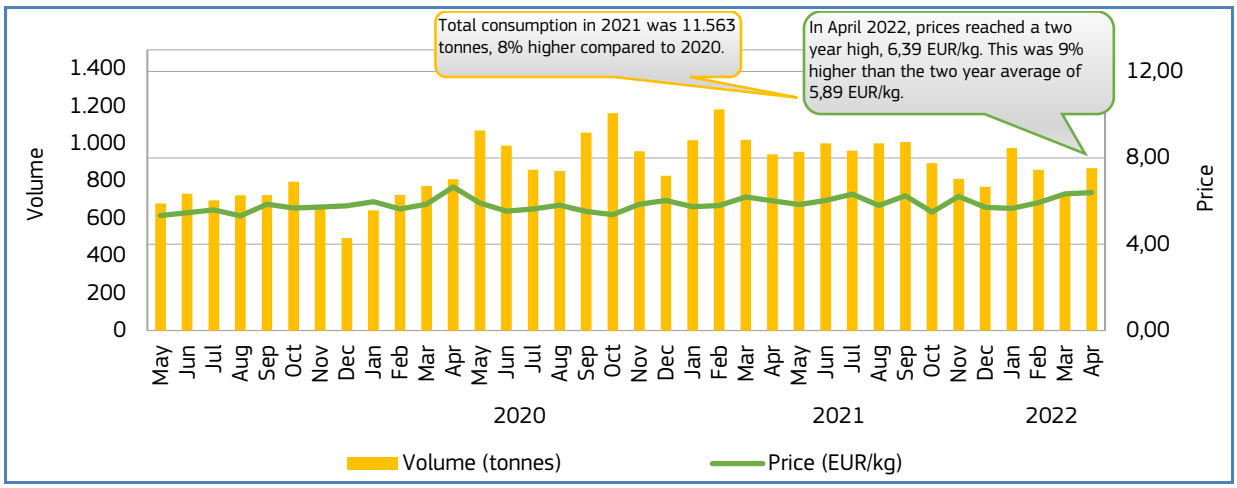
Figure 38. **RETAIL PRICE AND VOLUME OF GILTHEAD SEABREAM PURCHASED BY HOUSEHOLDS IN ITALY, MAY 2019 – APRIL 2022**



3.2.3. Household consumption trends in Portugal

Long-term trend (May 2019 to April 2022): Upward trend both in price and volume.
Yearly average price: 5,61 EUR/kg (2019), 5,81 EUR/kg (2020), 5,95 EUR/kg (2021).
Yearly consumption: 8.562 tonnes (2019), 10.727 tonnes (2020), 11.563 tonnes (2021).
Short-term trend (January to April 2022): Upward trend both in price and volume.
Price: 6,08 EUR/kg.
Consumption: 3.435 tonnes.

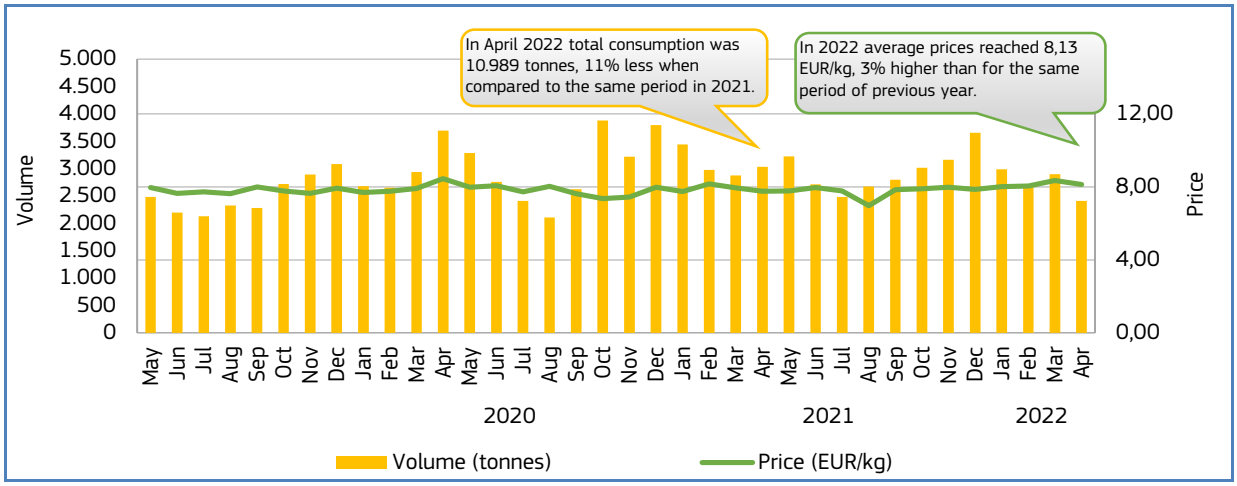
Figure 39. **RETAIL PRICE AND VOLUME OF GILTHEAD SEABREAM PURCHASED BY HOUSEHOLDS IN PORTUGAL, MAY 2019 – APRIL 2022**



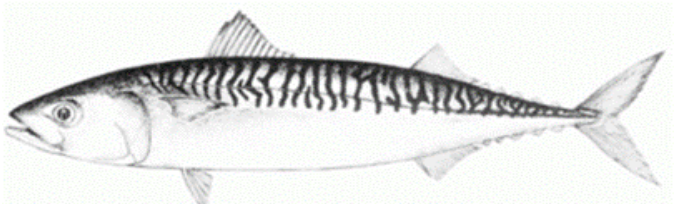
3.2.4. Household consumption trends in Spain

Long-term trend (May 2019 to April 2022): Downward trend in price and relatively stable volumes.
Yearly average price: 7,74 EUR/kg (2019), 7,84 EUR/kg (2020), 7,81 EUR/kg (2021).
Yearly consumption: 29.915 tonnes (2019), 36.048 tonnes (2020), 36.041 tonnes (2021).
Short-term trend (January to April 2022): Upward trend in price and downward trend in volume.
Price: 8,13 EUR/kg.
Consumption: 10.989 tonnes.

Figure 40. **RETAIL PRICE AND VOLUME OF GILTHEAD SEABREAM PURCHASED BY HOUSEHOLDS IN SPAIN, MAY 2019 – APRIL 2022**



4. Case study – Atlantic mackerel in the EU



Source: FAO

Atlantic mackerel (*Scomber scombrus*) is a fast-swimming schooling pelagic fish easily recognisable by its round, torpedo-shaped body. Mackerel can reach the age of 20 years and a size of 70 cm and 3,5 kg but are seldom larger than 50 cm and a weight of one kg. It is a typical plankton feeder, swimming with the mouth open and filtrating zooplankton through the gill rakers. It also uses particulate feeding on fish larvae and small fish. Mackerel prefer waters warmer than 6°C. They spawn for the first time when they reach about 30 cm in length. Mackerel do not have a swim bladder and therefore need to constantly swim to avoid sinking.

The species can be found in an area spanning from Northwestern Africa up to the Barents Sea including Svalbard, and westward to Iceland and Greenland. Mackerel migrates into the North Sea and the Norwegian Sea to feed after spawning. There has been a historical expansion of mackerel in the last several years, and mackerel is now found west of Greenland, north of the Barents Sea and up to Svalbard, and east into Skagerrak in the summer. Mackerel stay in these areas throughout the autumn before migrating towards the spawning grounds early in the winter[26].

Total world landings of Atlantic mackerel have been higher than recommended by ICES in recent years. The main reason is substantial disagreement between the countries participating in the fishery on how to share the quotas. The EU MS together constitute the third largest catching nation of Atlantic mackerel after the UK and Norway. In addition to own landings, the EU is also supplied with substantial amounts from other mackerel-fishing nations in the North Atlantic. The EU exports mainly frozen mackerel to the African markets and fresh mackerel to neighbouring countries.

4.1 Global catch of Atlantic mackerel

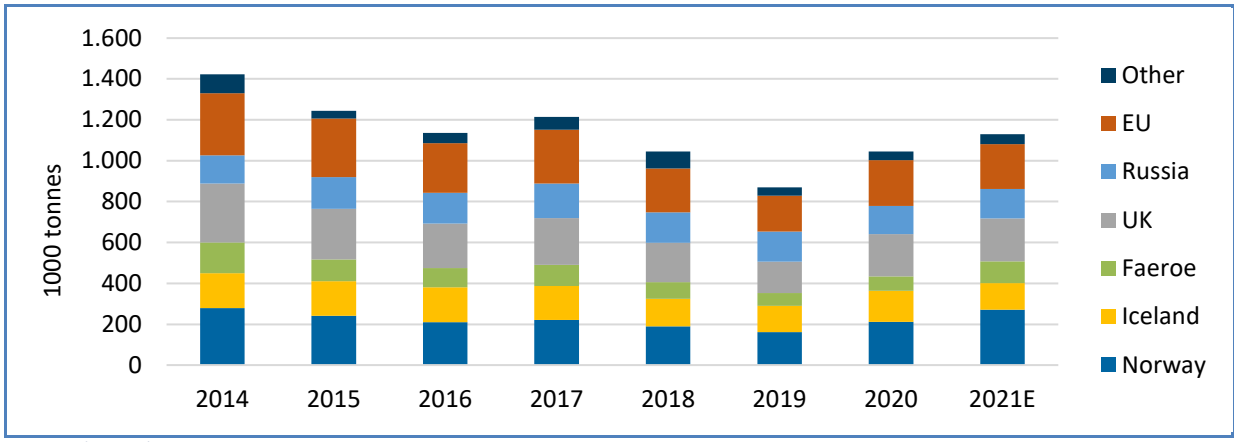
In 2021, global Atlantic mackerel catches reached 1,13 million tonnes, an 8% increase from 2020. The largest single catching nations were the UK and Norway, together accounting for 43% of global catches in 2021. The EU catches were estimated at around 219.000 tonnes, which accounted for 19% of global catches. The TAC advice for 2021 was 852.284 tonnes, an 8% reduction from 2020. For 2022, ICES advised a TAC of no more than 795.000 tonnes, a 7% decrease from the TAC advice in 2021[27].

There has for several years been a dispute around the size of the mackerel quota and the distribution between nations. This has led to significantly higher catches than scientific advice from ICES. The coastal states, EU, Norway, UK, Greenland, and the Faroe Islands have recently met for negotiations regarding the 2022 quota. They agreed on a total quota of 794.920 tonnes, but they failed to agree on the distribution between each fishing nation. The states will therefore set individual quotas. The Norwegian authorities have decided to set the 2022 quota at 278.222 tonnes which accounts for 35% of the TAC. The Faroe Islands have set the 2022 quota at 155.804 tonnes, which accounts for around 20% of the TAC, and Iceland has set a quota of 140.929 tonnes accounting for around 18% of the TAC. The allocated quota for other coastal states has not yet been announced.

The negotiations between Norway, the United Kingdom, the EU, the Faroe Islands, Iceland, and Greenland on a new distribution key will resume during the autumn of 2022, with a view to reaching a solution for 2023 and beyond[28].

[26] https://www.americanoceans.org/species/atlantic-mackerel
[27] http://www.ices.dk
[28] https://www.fiskeribladet.no/fiskeri/makrellkvoten-er-satt-sa-mye-far-flaten-fiske-i-ar-/2-1-1243484

Figure 41. **WORLD CATCH OF ATLANTIC MACKEREL BY FISHING NATION (volume in 1000 tonnes)**



Source: Pelagic Fish Forum, FAO

4.2 Atlantic mackerel in the EU – first sale

In 2020, mackerel landed by EU MS reached 203.000 tonnes, worth 157 million EUR. This was mostly driven by landings in the Netherlands, Ireland, and Spain. In total, volumes increased by 25% and values increased by 5% compared to 2019.

In addition to landings by EU MS, there were also landings in the EU from Norwegian, Faroese, and UK vessels. In 2019, mackerel was the fourth largest specie landed in the EU in terms of volume and the third largest in terms of value[29].

Table 21. **LANDINGS OF ATLANTIC MACKEREL BY EU MEMBER STATES (value in million EUR, volume in 1000 tonnes)**

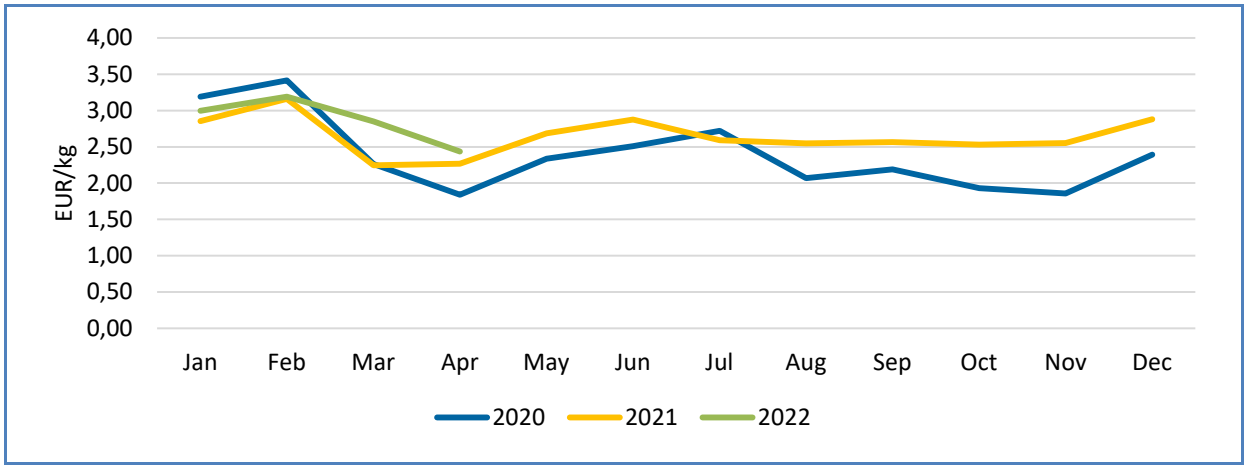
	2016		2017		2018		2019		2020	
Landing nation	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**
Netherlands	47	53	71	72	63	59	46	40	64	60
Ireland	53	71	70	84	NA	67	NA	53	NA	61
Spain	29	30	33	34	37	35	39	26	40	40
Denmark	19	17	NA	40	29	23	39	27	27	24
France	14	10	14	8	14	8	14	8	14	9
Germany	0	0	18	20	2	3	4	4	7	8
Italy	2	1	4	1	5	1	4	1	2	1
Other	2	1	3	2	3	2	3	1	2	1
Total*	**167**	**183**	**213**	**262**	**153**	**197**	**149**	**162**	**157**	**203**

**Note that the value of landings of mackerel is not available for Ireland for 2018 and onward. The actual landing value by EU MS may therefore be higher in 2018-2020*
Source: EUROSTAT

In 2021, the average first-sale price of fresh Atlantic mackerel in Spain increased by 11% to 2,63 EUR/kg. During January–April this year, the average first-sale price increased by 8% to 2,84 EUR/kg.

[29] https://www.eumofa.eu/documents/20178/477018/EN_The+EU+fish+market_2021.pdf/27a6d912-a758-6065-c973-c1146ac93d30?t=1636964632989

Figure 42. **FIRST-SALE PRICE OF FRESH MACKEREL IN SPAIN**



Source: EUROSTAT-COMEXT

4.3 Processing

Most of the mackerel in the EU is consumed prepared or preserved, and a large share of this is processed in the EU. In addition to own catch/landings in the EU, the fish processing industry imports large amounts of round frozen mackerel. Germany and Poland are the largest preserved mackerel producing countries in the EU[30].

In 2020, the volumes of prepared or preserved mackerel processed in the EU was nearly 42.000 tonnes, valued at nearly EUR 199 million. The volumes were 23% below the year before, and values decreased by 27%.

Table 22. **MACKEREL PROCESSED IN THE EU (volume in tonnes, value in 1000 EUR)**

	2017		2018		2019		2020	
Product	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**
Prepared or preserved mackerel, whole or in pieces	268.168	55.146	295.645	56.122	270.835	54.716	198.883	41.895

Source: EUMOFA elaboration of EUROSTAT PRODCOM database[31]

4.4 EU-27 Trade of Atlantic mackerel

EU imports

In the period from 2017 to 2021, EU mackerel imports varied from 148.000 tonnes to around 182.000 tonnes per year, and values varied between EUR 243 million to above EUR 271 million. In 2021, extra-EU imports of frozen Atlantic mackerel totalled 167.899 tonnes worth EUR 271 million. Compared with 2020, they increased by 10% in volume and 1% in value. In 2021, 33% of the mackerel volumes and 30% of the values originated from the UK, the main supplier. The top five suppliers, namely the UK, Iceland, Norway, Faroe Islands, and Greenland accounted for 85% of the volumes and 84% of the values.

[30] https://www.indexbox.io/store/eu-mackerel-prepared-or-preserved-market-analysis-forecast-size-trends-and-insights/
[31] https://www.eumofa.eu/processing-ts-at-eu-and-ms-levels

Table 23. **EXTRA-EU IMPORTS OF ATLANTIC MACKEREL BY MAIN SUPPLIERS (value in 1000 EUR, volume in tonnes)**

	2017		2018		2019		2020		2021	
Country	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**
UK	75.354	59.391	72.720	54.454	92.074	57.117	73.727	45.615	82.483	55.851
Iceland	33.497	20.743	44.622	26.427	45.385	21.680	51.906	23.928	52.309	26.588
Norway	35.617	24.199	34.031	21.353	31.957	16.978	58.285	33.920	46.450	28.902
Faroe Islands	43.622	33.471	25.874	18.025	43.092	25.826	27.556	16.541	23.284	15.175
Greenland	24.171	20.341	22.841	17.081	18.392	12.728	19.534	12.955	22.047	15.757
Cape Verde	9.617	1.936	14.801	2.759	9.038	1.642	12.230	2.197	15.262	2.461
Ecuador	2.242	2.152	2.127	1.680	3.124	603	5.062	2.145	10.931	7.551
Other	36.240	19.646	26.305	16.552	19.663	11.296	20.264	14.867	18.562	15.614
Total	**260.360**	**181.879**	**243.322**	**158.331**	**262.725**	**147.871**	**268.565**	**152.170**	**271.328**	**167.899**

Source: COMEXT

In 2021, imports of frozen mackerel accounted for 87% of total volumes, while imports of fresh mackerel accounted for 10%. In terms of value, frozen mackerel accounted for 79% and fresh mackerel accounted for 11%. The frozen category consisted of 90% round frozen mackerel and 10% fillet. The fresh category was 100% whole fish.

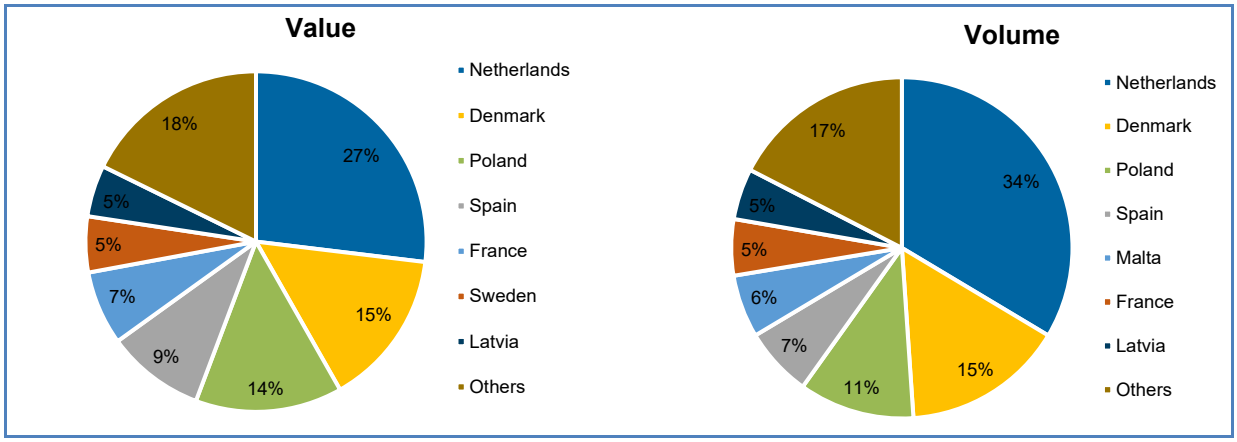
Table 24. **EXTRA-EU IMPORT BY PRESERVATION STATE (value in 1000 EUR, volume in tonnes)**

	2017		2018		2019		2020		2021	
Country	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**
Frozen	186.999	148.660	173.104	127.889	186.517	113.644	215.177	133.128	214.801	145.926
Live/fresh	33.409	22.785	35.804	22.592	48.386	27.137	24.270	12.137	28.552	16.010
Prepared/preserved	39.661	10.349	33.023	7.581	24.954	6.447	26.618	6.317	27.245	5.820
Smoked	291	84	1.392	269	2.868	643	2.501	588	729	143
Total EU	**260.360**	**181.879**	**243.322**	**158.331**	**262.725**	**147.871**	**268.565**	**152.170**	**271.328**	**167.899**

Source: Eurostat-COMEXT

The largest importer in terms of both volume and value is the Netherlands, accounting for 27% of the values and 34% of the volumes in 2021. A large share of the import to the Netherlands is re-exported to African countries such as Nigeria and Egypt. Denmark and Poland are the second and third largest exporters.

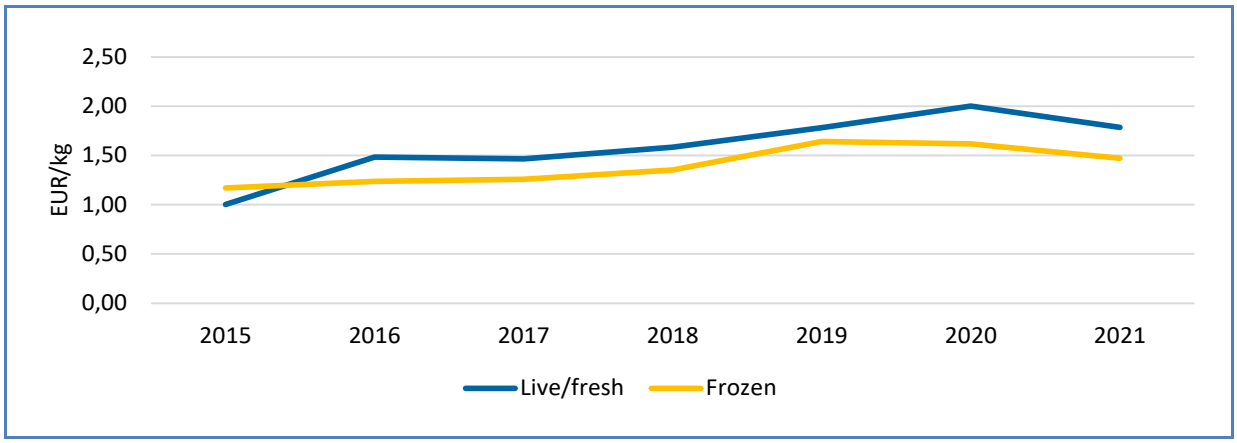
Figure 43. **EXTRA-EU IMPORTERS OF ATLANTIC MACKEREL BY MS**



Source: Eurostat-COMEXT

In 2021, the average import price of frozen mackerel was 1,47 EUR/kg, a 9% decrease from 2020. Average import price of fresh mackerel was 1,78 EUR/kg, a 11% decrease from the year before.

Figure 44. **PRICES OF FRESH AND FROZEN MACKEREL IMPORTED INTO THE EU (prices in EUR/kg)**



Source: COMEXT

4.5 Exports

In the period from 2017 to 2021, EU exports of mackerel varied from 172.000 tons to around 257.000 tons a year, while values varied between EUR 266 million and over EUR 353 million.

In 2021, EU MS exported a total of 180.311 tonnes mackerel valued at nearly EUR 305 million. Compared with 2020 they increased by 4% in volume and 1% in value. The largest destination market was Norway, accounting for 17% of volume and values in 2021. The UK and Nigeria were the second and third largest markets accounting for 15% and 12% of the values and 8% and 13% of the volumes respectively.

Around 65% of the exports were round frozen mackerel and 27% were fresh mackerel, mainly landed in foreign harbours in Norway and the UK[32].The largest exporting countries were Denmark, Ireland, and the Netherlands.

[32] https://www.fiskeridir.no/

Table 25. **EXTRA- EU EXPORT OF ATLANTIC MACKEREL BY MAIN MARKETS (values in 1000 EUR, volume in tonnes)**

	2017		2018		2019		2020		2021	
Country	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**
Norway	43.801	27.809	34.262	17.288	44.318	19.245	30.973	13.623	52.468	30.464
UK	61.337	31.107	49.218	21.401	70.531	28.523	53.086	16.282	45.940	14.695
Nigeria	75.822	61.178	30.767	25.118	46.842	30.152	52.315	35.169	35.494	23.276
Faroe	9.100	8.990	5.394	4.026	2.340	1.450	10.833	7.797	26.742	18.688
Egypt	24.694	24.450	20.440	18.429	20.589	14.937	39.633	28.538	25.660	19.106
China	9.585	6.804	15.327	10.022	24.421	14.624	7.394	4.987	18.371	11.245
Russia	23.216	16.330	13.113	9.063	11.135	6.563	9.696	6.643	13.221	8.955
Ukraine	13.794	9.610	19.334	13.696	24.888	14.126	18.067	11.338	11.371	7.290
Ghana	28.032	21.311	13.851	10.749	9.070	5.968	19.184	13.231	9.910	6.769
Japan	11.242	7.875	13.272	8.445	13.508	7.230	9.596	5.886	9.910	6.167
Other	52.587	41.102	51.111	34.205	56.276	30.941	51.841	29.779	55.478	33.655
Total EU	**353.210**	**256.565**	**266.089**	**172.444**	**323.918**	**173.759**	**302.618**	**173.272**	**304.565**	**180.311**

Source: Eurostat-COMEXT

4.6 Consumption

In 2019, EU consumption of mackerel was 0,53 kg per capita, giving mackerel a twelfth-place ranking among the most consumed fish species in the EU behind tuna, salmon, cod, Alaska pollock, shrimps, mussels, hake, herring, squid, surimi, and sardine[33]. Mackerel saw a 12% decrease in consumption from 2018, mainly due to lower catches in Spain.

In 2018, the countries with the highest volumes of mackerel consumption in the EU were Germany and France, followed by Poland, the Netherlands, and Italy[34].

[33] https://www.eumofa.eu/documents/20178/477018/EN_The+EU+fish+market_2021.pdf/27a6d912-a758-6065-c973-c1146ac93d30?t=1636964632989
[34] https://www.globaltrademag.com/germany-consumes-most-of-preserved-mackerel-in-the-eu/

5. Case study: Raw material costs for fishery and aquaculture value chains

Since the beginning of 2020, the European fishery and aquaculture market has been disrupted as a result of the COVID-19 pandemic. In addition, Russia's invasion of Ukraine on 24 February 2022 has deepened the inflation observed over the last years for several commodities. The EU fishery and aquaculture sector has been directly impacted by the increase in costs of marine fuel, electricity, and fish feed for aquaculture, resulting in higher costs for production and processing. Also, the shortage in some key raw materials and inputs (e.g. sunflower oil) has increased pressure on prices, which rose significantly in the recent period[35].

This case study provides an analysis of the most recent data available for input material that may result in the increase of production costs for producers and final prices for the consumers. The table below provides the relevance of each input material for the segments of fishery and aquaculture production and processing.

Table 26. **RELEVANCE OF INPUT MATERIAL FOR THE FISHERY AND AQUACULTURE SECTOR**

Sectors	Sub-sectors	Fish raw material	Energy	Salt	Flour	Oil	Tin
Fisheries			x				
Aquaculture		x	x		x		
Processing of fisheries and aquaculture products	Tuna canning industry	x	x	x		x	x
	Breading industry	x	x	x	x		
	Smoking industry	x	x	x			
	Cooking industry	x	x	x			

5.1. Analysis of data through EUMOFA dashboard on raw material costs

The European Market Observatory for Fisheries and Aquaculture Products (EUMOFA) gathers data on the fish raw materials (produced in the EU or imported) that are most commonly used by the processing industry. These data are provided through the following link to the EUMOFA dashboard on raw material costs: https://www.eumofa.eu/raw-material-dashboard

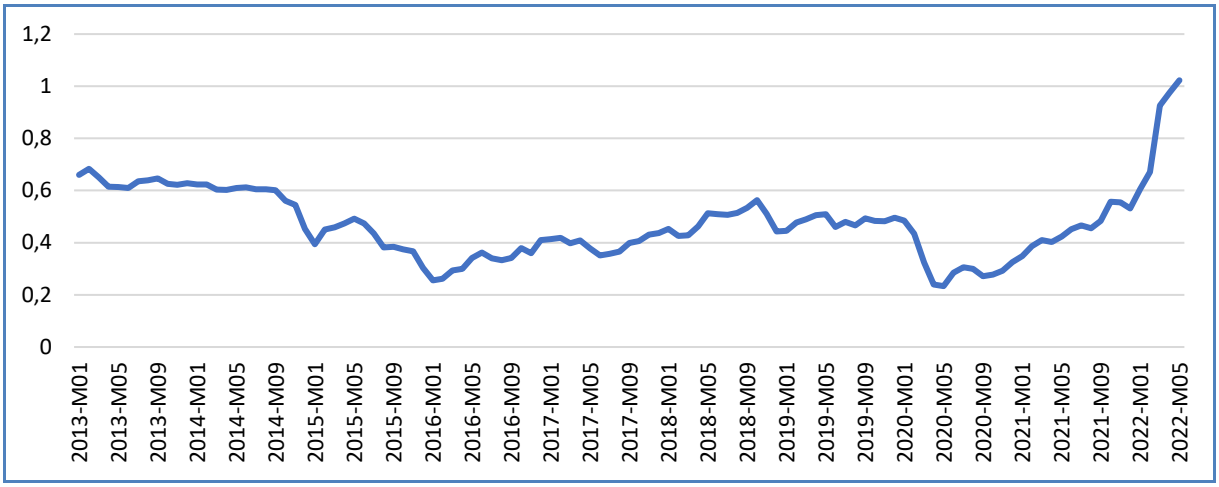
When recent data are not available on the EUMOFA dashboard, alternative sources have been used to provide an indication of the latest evolution in prices.

Energy

Marine gasoil: Marine gasoil prices fluctuated between January 2013 and January 2020, with an overall downward trend. During the two first quarters of 2020, they decreased and were on average 31% lower than prices recorded during the same period in 2019. The marine gasoil price reached its lowest of the studied period (2016-2022) at the end of the second quarter of 2020 (about 0,23 EUR/L). This could be explained by the drop in price of crude oil, which is the main driver of marine fuel prices, as a result of the COVID-19 pandemic. However, since June 2020, marine gasoil prices have increased overall to reach the highest price recorded during the studied period, in May 2022. Between January and May 2022, marine gasoil prices were on average 113% higher than the same period in 2021 and 144% higher than the same period in 2020. The latest available data of marine gasoil show a monthly price of 1,02 EUR/L in May 2022 (+141% in comparison to May 2021 and +337% in comparison to May 2020).

[35] Russia and Ukraine are among the most important producers of agriculture commodities. According to the FAO, they ranked amongst the top three global exporters of wheat, maize, rapeseed, sunflower seeds, and oil.

Figure 45. **PRICES OF MARINE GASOIL BY MEMBER STATE (EUR/L)**



Source: EUMOFA BASED ON MABUX.

The analysis by MS shows that the increase in prices of marine gasoil was observed for all concerned MS, with a significant increase in the second quarter of 2022. The MS with the highest increase levels include the Netherlands, Belgium, Sweden, and Denmark. Meanwhile, the MS with the lowest increase levels include Spain, Croatia, Latvia, and Lithuania.

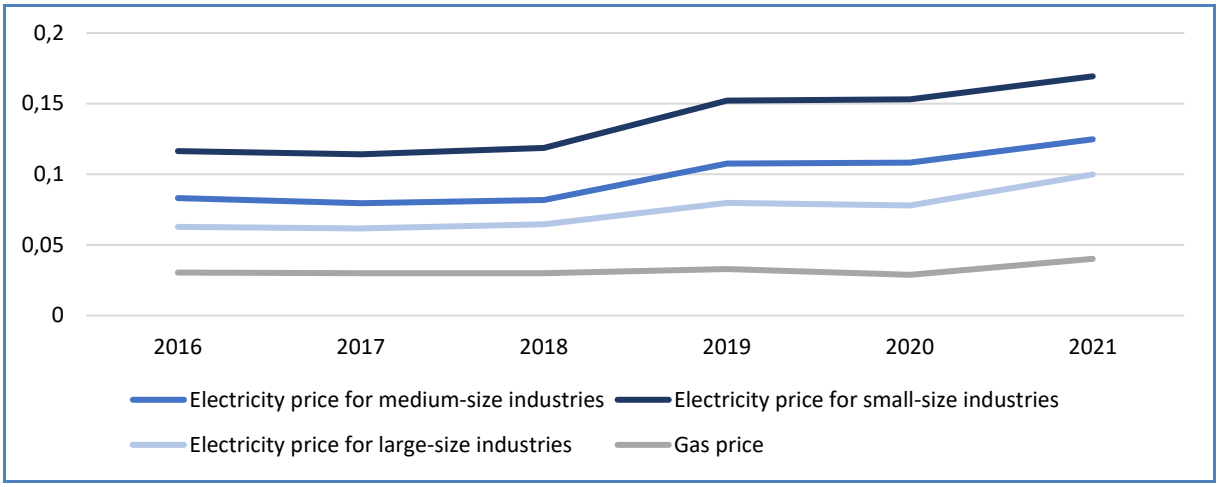
Table 27. **PRICES ROF MARINE GASOIL BY MEMBER STATE (EUR/L)**

MS	2020				2021				2022		% 2022/2021		% 2022/2020	
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q1	Q2
Belgium	0,36	0,22	0,26	0,27	0,35	0,39	0,43	0,50	0,70	0,97	97%	148%	92%	341%
Cyprus	0,54		0,21	0,32	0,35	0,42	0,43	0,50	0,72	1,00	104%	137%	34%	
Germany	0,38	0,24	0,28	0,28	0,37	0,42	0,46	0,54	0,73	0,99	96%	137%	89%	314%
Denmark	0,40	0,25	0,28	0,29	0,37	0,42	0,46	0,54	0,73	1,04	96%	149%	85%	318%
Estonia	0,41	0,26	0,30	0,29	0,38	0,43	0,48	0,56	0,74	0,99	92%	130%	81%	279%
Spain	0,44	0,32	0,34	0,34	0,42	0,46	0,50	0,59	0,77	1,03	82%	123%	75%	224%
Finland	0,41	0,25	0,30	0,29	0,38	0,43	0,48	0,55	0,73	0,93	89%	117%	75%	273%
France	0,41	0,26	0,30	0,31	0,39	0,43	0,47	0,54	0,74	1,01	88%	134%	82%	283%
Greece	0,42	0,22	0,28	0,29	0,37	0,41	0,46	0,54	0,69	0,94	86%	128%	64%	321%
Croatia	0,46	0,28	0,34	0,34	0,41	0,46	0,51	0,59	0,76	1,01	83%	121%	66%	256%
Ireland	0,41	0,26	0,30	0,31	0,39	0,43	0,47	0,54	0,74	1,01	88%	136%	82%	285%
Italy	0,44	0,25	0,30	0,30	0,38	0,43	0,49	0,57	0,73	0,99	91%	129%	65%	297%
Lithuania	0,41	0,26	0,30	0,29	0,38	0,43	0,47	0,55	0,74	0,98	93%	129%	78%	273%
Latvia	0,42	0,26	0,30	0,30	0,38	0,43	0,48	0,56	0,74	0,98	93%	129%	78%	272%
Malta	0,40	0,25	0,28	0,28	0,38	0,42	0,46	0,56	0,74	1,01	97%	141%	85%	308%
Netherlands	0,36	0,22	0,26	0,27	0,36	0,39	0,43	0,51	0,70	0,97	96%	147%	93%	343%
Poland	0,40	0,25	0,29	0,29	0,38	0,43	0,47	0,55	0,76	1,03	98%	141%	89%	311%
Portugal	0,42	0,26	0,29	0,30	0,39	0,43	0,47	0,56	0,75	1,06	95%	145%	80%	314%
Sweden	0,38	0,24	0,27	0,28	0,36	0,41	0,45	0,53	0,72	1,02	99%	153%	88%	333%
Slovenia			0,31	0,33	0,41	0,45	0,50	0,58	0,75	1,00	84%	122%		

Source: EUMOFA BASED ON MABUX. Note: Q2 for 2022 includes data up to May 2022.

Gas and electricity: Gas prices increased significantly (by 39%) between 2020 and 2021, after a relatively stable period between 2016 and 2020 (-3%). Electricity prices have also followed an upward trend since 2016. The highest increase rate was observed between 2018 and 2019 (by 28% on average). In 2021, electricity prices for industries increased on average by 16% in comparison to 2020, and by 54% in comparison to 2016.

Figure 46. **PRICES OF GAS AND ELECTRICITY (EUR/KWH)**



Source: EUROSTAT-COMEXT

Fish raw material

Similarly to energy costs, prices for fish raw material used by the processing industry have increased in recent months. The main insights from the analysis of data of fish raw material are summarized below:

- **Tuna for the tuna canning industry:** data analysed concern three types of tuna products used by the canning industry: skipjack precooked loins from Ecuador, whole skipjack tuna (1,8 – 3,4 kg/piece) from different origins, and whole yellowfin tuna (>10 kg) from different origins. There has been an almost steady increase in prices of these products from the end of 2021. Prices of skipjack tuna loins imported from Ecuador increased in the first quarter of 2022 by 55% in comparison to the same period in 2021, and by 20% in comparison to the same period in 2016. However, prices recorded in May 2022 were equivalent to those recorded in October and November 2017. For whole skipjack tuna, a particular price increase was seen between October 2021 and January 2022. A slight decrease in prices was observed in May 2022 (-8% in comparison to April 2022). For whole yellowfin tuna, prices increased significantly in the first quarter of 2022. Prices were relatively stable between April 2022 and May 2022 (between 3,10 EUR/kg and 3,15 EUR/kg).

- **Salmon for the smoking industry:** recent data are available for two types of salmon products used by the smoking industry: fresh gutted salmon (5-6 kg/piece) and fresh whole salmon (2-3 kg/piece), both from Norway. Prices of fresh gutted salmon were highly variable between 2017 and 2022. However, the latest data show a steady and sharp increase in prices from October 2021. Prices increased from 1,45 EUR/kg to 12,53 EUR/kg between October 2021 and May 2022. In contrast, prices of fresh whole salmon were variable between November 2021 and May 2022, with a decrease in prices in May 2022 in comparison to previous months (by 32%).

- **Alaska pollock for the breading industry[36]:** import prices of frozen fillets of Alaska pollock fluctuated over the studied period (January 2016 and April 2022). Recent data show a steady increase from January 2021 for frozen fillets of Alaska pollock imported from the USA (+27%) and from June 2021 for products imported from China (+29%).

- **Hake for the breading industry:** recent data are available for hake imported frozen from Namibia. These data show that prices were stable over the period between April 2020 and August 2021. Prices started to increase from September 2021. However, they slightly decreased (by 2%) in May 2022 in comparison to the previous month.

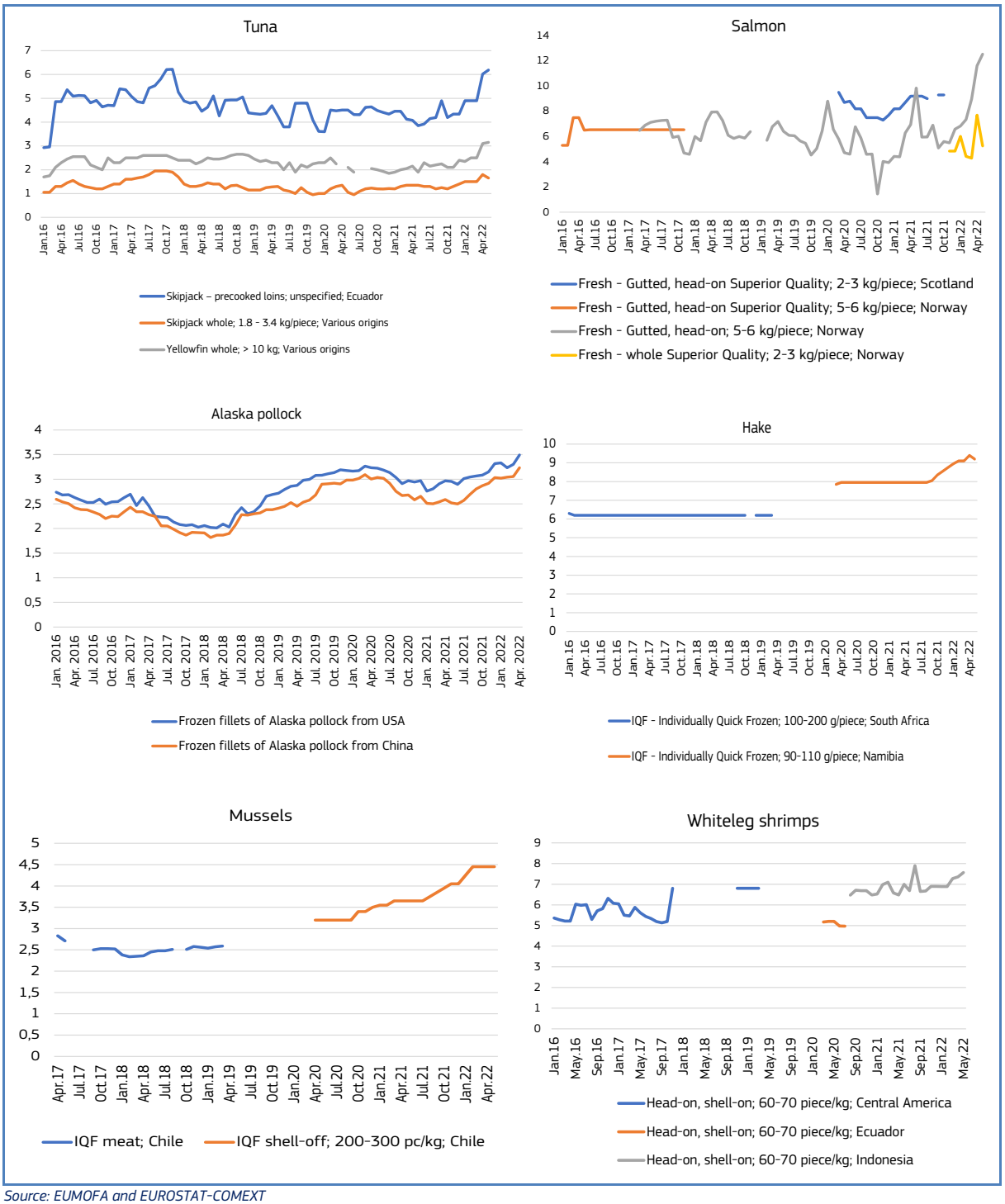
- **Mussels for the cooking and prepared meals and dishes industry**: recent data are available for mussels, shell off, imported from Chile. These data show that prices followed a steady increase between September 2020

[36] Data on imports of Alaska pollock by Germany (the most important producer of fish fingers in the EU), from the USA, and from China (the main suppliers of Alaska pollack to the European market) were used as a proxy for prices of raw material used by the breading industry as an alternative data source (EUMOFA dashboard does not provide recent data for Alaska pollock used by the breading industry).

and January 2022. From February 2022, prices have been stable at 4,45 EUR/kg (+5% in comparison to January 2022 and +39% in comparison to April 2020).

- **Whiteleg shrimps for the cooking/breading industry:** the latest available data for whiteleg shrimps (head-on, shell-on) imported from Indonesia show that there was only a slight increase in prices between February 2022 and May 2022 (+10%).

Figure 47. **PRICES OF FISH RAW MATERIAL (EUR/kg)**



Source: EUMOFA and EUROSTAT-COMEXT

Other input material

Data provided below concern other input materials that are used by the fisheries and aquaculture production and processing sectors. For example, oil and tin are used in significant quantities by the canning industry, while flour (made of bread wheat) is used by the fish feed industry as well as the industries for breading and fish meals and dishes.

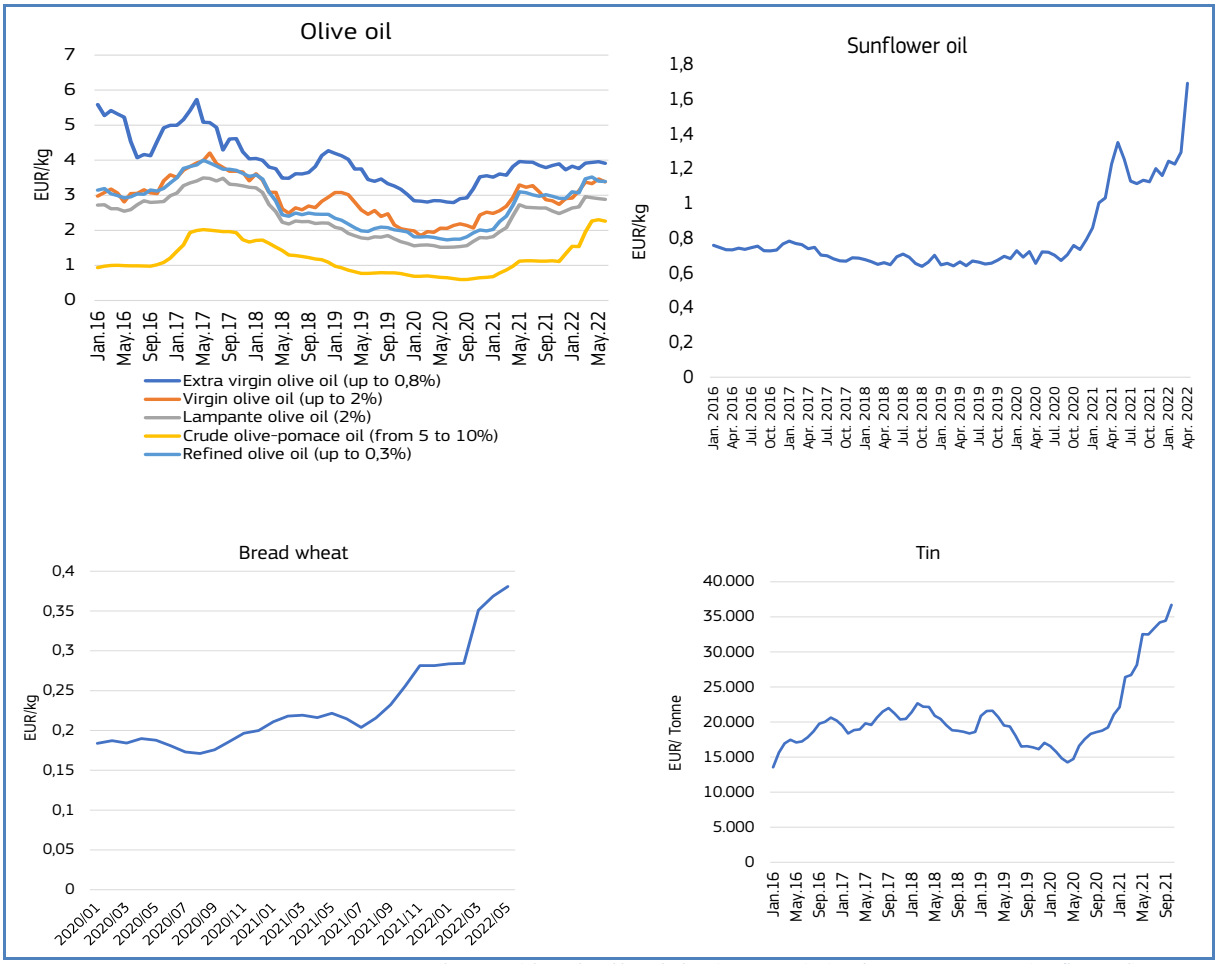
- **Oil:** Figures below show prices of different types of olive oil produced in the EU and prices of sunflower oil imported from Ukraine to the EU to provide an indication of recent evolution in prices of oil that could be used by the fish processing industry[37]. Data show that prices of olive oil have followed an upward trend between January 2016 and June 2022, except for extra virgin olive oil (up to 0,8%) where a 30% decrease was observed. Looking to the more recent period, prices have fluctuated since April/May 2020 with an overall upward trend. However, prices of all types of olive oil stabilised or decreased slightly between March and June 2022. In contrast, after a period where prices of imported sunflower oil were relatively stable, prices increased between October 2020 and May 2021 (+78%) then decreased between May 2021 and August 2021 (-18%). Since February 2022, there was a steady and sharp increase in prices. In April 2022, prices reached the highest level recorded since January 2016 (1,7 EUR/kg).

- **Bread wheat**: There has been an overall upward trend in prices of bread wheat since January 2020. The increase has been significant since August 2021, with an average monthly increase of 7%. The highest increase occurred in March 2022 (+24% in comparison to the previous month).

- **Tin** (data are only available up to October 2021): There was a steady and sharp increase in prices since May 2020. In October 2021, tin prices reached a level that was 150% higher than those recorded in May 2020. However, more recent data show that prices significantly dropped from March 2022 to reach the levels previously observed in early 2021[38].

[37] Ukraine represents the main source of sunflower oil imported to the EU. In 2019, it represented 88% of the imports of sunflower oil imported to the EU in volume and 87% in value.
[38] Source: https://markets.businessinsider.com/commodities/tin-price

Figure 48. **PRICES OF FISH RAW MATERIAL**



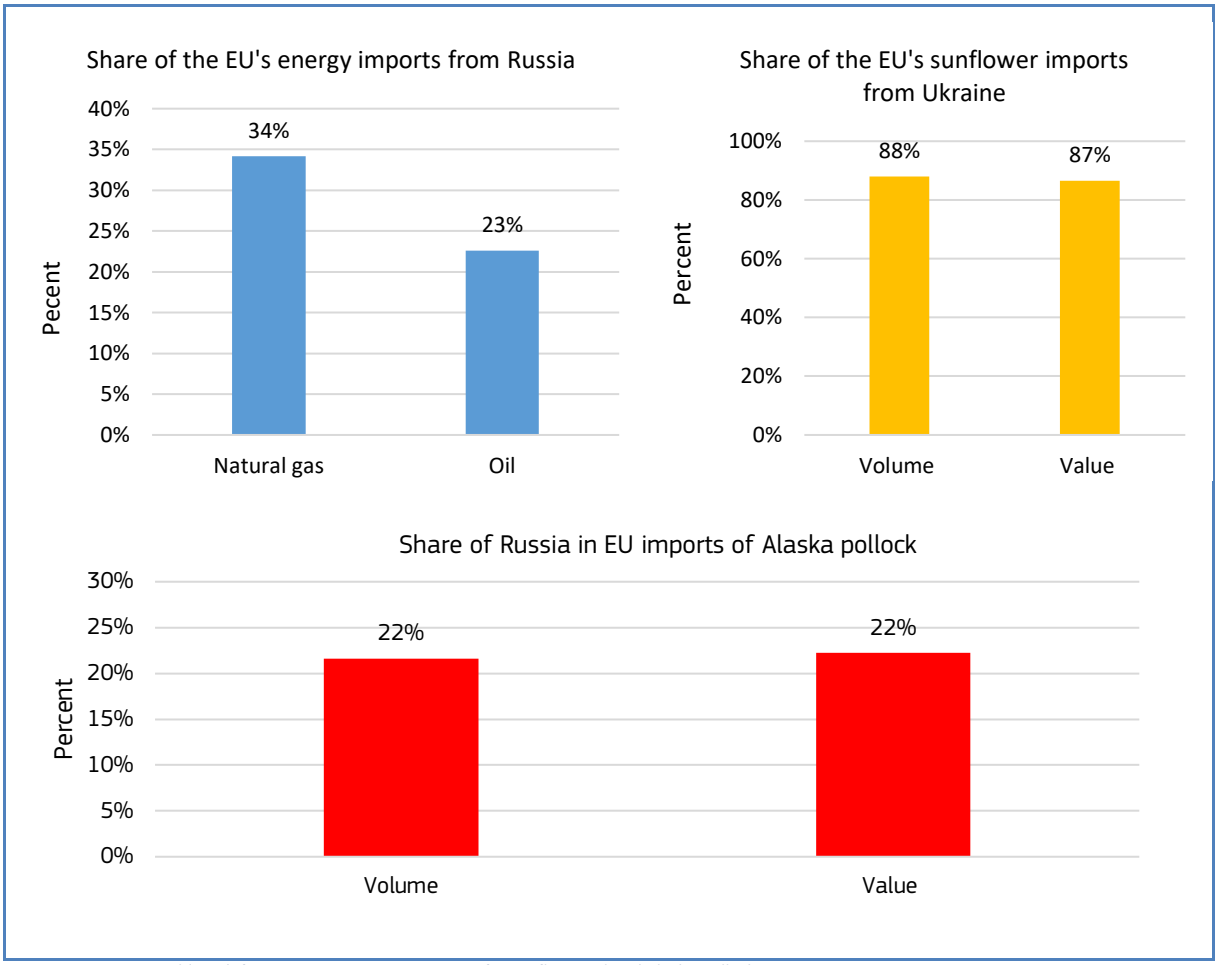
Source: European Commission/DG AGRI: Price monitoring by sector (olive oil and bread wheat), EUMOFA (tin) and EUROSTAT-COMEXT (sunflower oil)

Dependance of the EU on raw materials from Ukraine and Russia

The EU imports a substantial share of its energy from Russia, including natural gas (34% of imports in volume) and crude oil (almost 23% in volume)[39]. Russia is also a key supplier of Alaska pollock to the EU market (22% of imports in volume and value in 2021). Similarly, Ukraine, which is the world's largest exporter of sunflower oil, is the largest supplier of the European market with sunflower oil (88% of imports in volume and 87% in value).

[39] Commodity Markets www.worldbank.org

Figure 49. **COMMODITY DEPENDANCE OF THE EU ON IMPORTS FROM RUSSIA AND UKRAINE (PERCENT)**



Sources: Eurostat; World Bank for energy, EUROSTAT-COMEXT for sunflower oil and Alaska pollock imports

Analysis by sector: examples of impacts

Fisheries

- Increase in marine gasoil. Some fleet segments have already been particularly impacted, especially those using towed gears and fishing at long-distance, such as large-scale trawlers which consume large amounts of fuel during their operations. Several vessels are already lying idle across EU countries as they cannot transfer this level of increase on first-sale prices. Increases in first-sale prices are already noticeable in sales notes and auction data. However, the selling process, especially in auctions, does not always allow to transfer directly the totality of the increase of operating costs as prices are rather dependent on the demand.

Aquaculture

- Increase in prices and reduced availability of fish feed raw material: prices of relevant vegetal raw material such as wheat, maize, corn, sunflower oil, etc. have increased as a result of Russia's invasion of Ukraine, which comes on top of an already very challenging sourcing environment due to COVID-19.
- Increase in energy prices (e.g. electricity for RAS systems, marine gasoil for shellfish farming, etc.).
- Increase in prices of oxygen due to the rising cost of electricity.

In addition, not directly related to the increase of costs, but as Ukraine is a relevant export market for French operators (particularly oysters), some shellfish farmers also experienced other direct impacts of the international context, with the loss of a share of their export markets.

Processing industry

- Tuna canning: although tin prices have dropped since the beginning of the year, the increasing prices of the raw material (especially skipjack tuna and olive and sunflower oil) may contribute to higher prices at retail stage, as well as lower economic performance for canning companies if they do not manage to transfer all the increase of selling prices.
- Salmon smoking: the sharp increase of salmon prices and energy since the beginning of the year may contribute to higher prices at retail stage to a certain extent but may lead as well to lower economic performance for smoking companies if the demand decreases due to the inflation.
- Fishfingers: the sharp increase of wheat and oil prices, together with the increasing prices of the whitefish species used (Alaska pollock, hake, etc.), may lead to lower economic performance for this sector and higher prices for the final products in the retail markets.

6. Global highlights

EU / Fisheries management: The European Climate, Infrastructure and Environment Executive Agency (CINEA) has published a study contracted by the European Commission on regionalisation. The findings of the study provide a comprehensive overview of the regionalisation process and examine its main developments over time, explicitly mapping the stakeholders involved, role of regional groups, and management measures adopted. The study concludes that regionalisation has allowed for fisheries management that is better adapted to local situations and facilitates a focus on longer-term goals. It also concludes that regionalisation is both necessary and useful as, without it, it would be difficult to manage fisheries with the same level of detail.[40]

EU / France / EMFAF: On 2 June, the Commission adopted its Partnership Agreement with France, laying down an investment strategy worth EUR 18.4 billion in cohesion policy funding for the period 2021-2027. Around EUR 567 million from the European Maritime Fisheries and Aquaculture Fund will facilitate the ecological transition of the fishing and aquaculture sectors. The funding will help bring fisheries and aquaculture products in line with the expectations of consumers for sustainable food choices, sustain small-scale coastal fishing, improve the sectors' resilience, and boost take-up of innovative solutions to the challenges of today[41].

EU / Fishery / Sustainability: On 1 June, the Commission published its Communication "Towards more sustainable fishing in the EU: state of play and orientations for 2023", giving an annual review of EU fisheries management and outlining priorities for 2023. The figures show that conservation efforts are further bearing fruit and that the EU fisheries policy has been delivering in reducing overfishing in European waters[42].

Iceland / Fishery / Legislation: The Minister of Food, Agriculture, and Fisheries, Svandís Svavarsdóttir, has appointed four working groups to analyse challenges and opportunities in Iceland's fisheries sector and related sectors, as well as to assess the macroeconomic benefits of the existing fisheries management system. The four groups have the task of producing new legislation on fisheries management, which may involve a complete overhaul of the existing legislation that governs the sector. They have until the end of 2023 to complete their assignments, which will result in new comprehensive legislation on fisheries management or new legislation on marine resources. Other stated aims are projects in the fields of energy transition, innovation, and marine research, as well as transparency and mapping of ownership in the fisheries sector[43].

MEDSEA4FISH / Fishery: The programme was officially launched with the endorsement of the guiding document by the Scientific Advisory Committee on Fisheries (SAC) of the General Fisheries Commission for the Mediterranean (GFCM). An important deliverable of the GFCM 2030 Strategy, the MedSea4Fish is an ambitious long-term programme, combining the European Union's (EU) common fishery policy (CFP) models of regionalisation and stakeholder participation with the GFCM capacity-building framework. It will support Mediterranean riparian countries and stakeholders in meeting their GFCM commitments through active participation in strategic initiatives. The goals of the programme are to create a level playing field and to ensure the sustainable management of fisheries in the Mediterranean Sea[44].

Iceland / Fishery: The Icelandic Marine and Freshwater Research Institute has recommended a 6% decrease in cod catch quotas for the next fishing season, due to a lower estimate of the reference biomass compared to previous years and the effect of the catch stabiliser in the harvest control rule. On the other hand, suggested catch quotas for haddock increase to 62,219 tonnes, up 23% from last year[45].

[40] https://ec.europa.eu/oceans-and-fisheries/news/fisheries-cinea-study-finds-regionalisation-improves-long-term-local-fisheries-management-more-work-2022-06-08_en
[41] https://ec.europa.eu/commission/presscorner/detail/en/IP_22_3368
[42] https://ec.europa.eu/commission/presscorner/detail/en/ip_22_3303
[43] Four Working Groups to Overhaul Iceland's Fisheries Legislation (www.icelandreview.com)
[44] https://ec.europa.eu/oceans-and-fisheries/news/fisheries-medsea4fish-programme-formally-launched-2022-06-21_en
[45] Less Cod, More Haddock To Be Fished Next Year (www.icelandreview.com)

7. Macroeconomic Context

7.1. Marine fuel

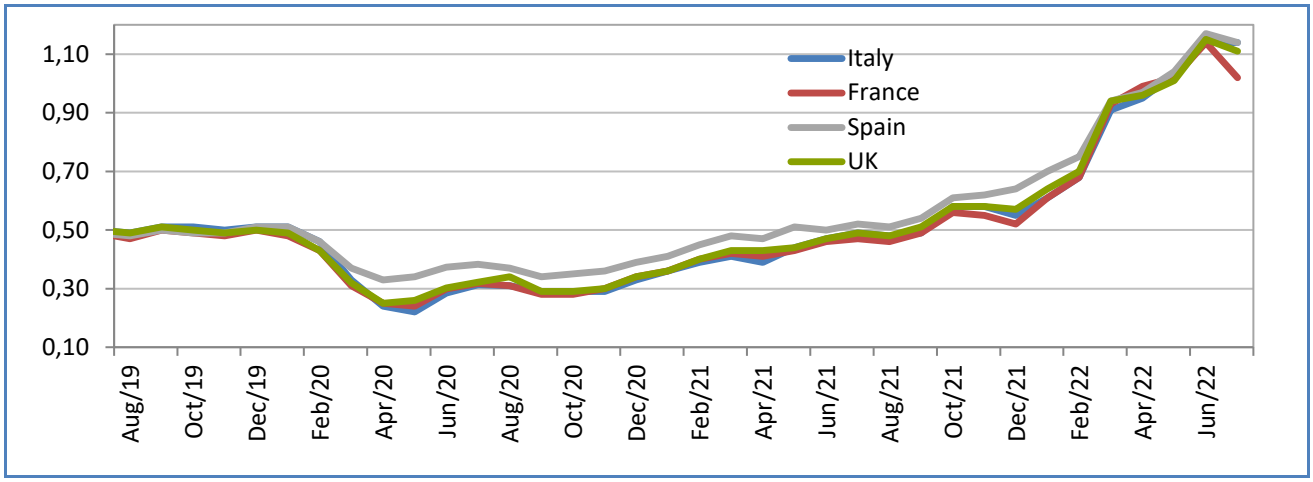
Average prices for marine fuel in **July 2022** ranged between 1,02 and 1,14 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices decreased by an average of about 4,1% compared with the previous month, and they increased by an average of 123,9% compared with the same month in 2021.

Table 28. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Jul 2022	Change from Jun 2022	Change from Jul 2021
France *(ports of Lorient and Boulogne)*	1,02	-11%	117%
Italy *(ports of Ancona and Livorno)*	1,14	0%	133%
Spain *(ports of A Coruña and Vigo)*	1,14	-3%	119%
The UK *(ports of Grimsby and Aberdeen)*	1,11	-3%	127%

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

Figure 50. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

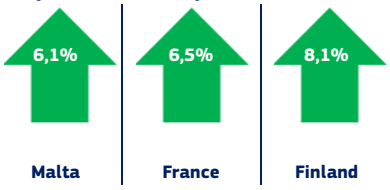


Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

7.2. Consumer prices

The EU annual inflation rate was at 9,6% in June 2022, up from 8,8% in May 2022. A year earlier, the rate was 2,2%.

Inflation: lowest rates in June 2022, compared with May 2022.



Inflation: highest rates in June 2022, compared with May 2022.

Table 29. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

	Jun 2020	Jun 2021	May 2022	Jun 2022	Change from May 2022	Change from Jun 2021
Food and non-alcoholic beverages	110,60	111,03	122,38	123,88	↑ 1,2%	↑ 11,6%
Fish and seafood	113,53	114,36	125,39	126,78	↑ 1,1%	↑ 10,9%

Source: Eurostat.

7.3. Exchange rates

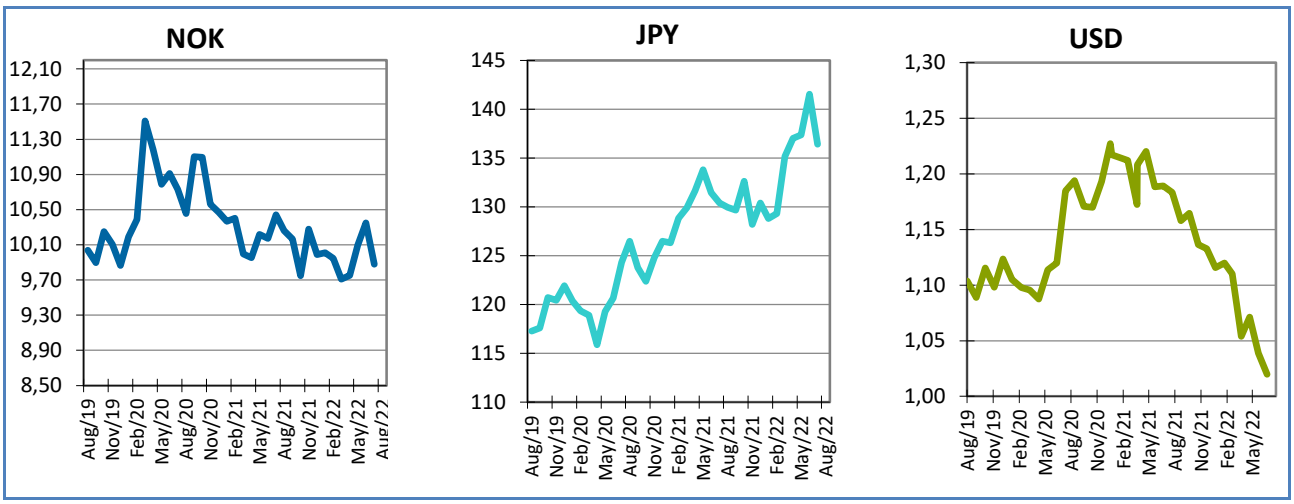
Table 30. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Jul 2020	Jul 2021	Jun 2022	Jul 2022
NOK	10,7323	10,4405	10,3485	9,8773
JPY	124,31	130,39	141,54	136,42
USD	1,18	1,1891	1,0387	1,0198

Source: European Central Bank.

In July 2022, the euro appreciated against the US dollar (0,1%) and depreciated against the Norwegian krone (4,6%) and the Japanese yen (3,6%), relative to the previous month. In the current year, the euro has fluctuated around 135,09 against the Japanese yen. Compared with July 2021, the euro has appreciated 4,6% against the Japanese yen, and depreciated 14,2% against the US dollar, 5,4% against the Norwegian krone.

Figure 51. **TREND OF EURO EXCHANGE RATES**



Source: European Central Bank.

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FOR MORE INFORMATION AND COMMENTS:

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

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

First sales: EUR-Lex, DG Mare – European Commission, ICES, FAO, Legifrance.gouv.fr, Pelagic Freezer-trawler Association, MarLIN, FishBase.

Consumption: EUROPANEL, Fishbase

Case studies: European Commission -DG AGRI, EUROSTAT-COMEXT, Mabux, Markets Insider, World Bank, American Oceans, ICES, Fiskeribladet, The Danish Fisheries Agency, Directorate of Fisheries of Norway

Global highlights: DG Mare - European Commission, FAO, icelandreview.com.

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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