

Monthly Highlights

No. 1 / 2021

EUMOFA

European Market Observatory for
Fisheries and Aquaculture Products

In this issue

According to data collected by EUMOFA from 13 EU Member States, in October 2020 common octopus and broadtail shortfin squid together accounted for 26% of the total first-sales value of the “Cephalopods” commodity group.

The price of frozen squid imported from Morocco dropped significantly in 2020, ranging from 6,00 to 7,00 EUR/kg, while the volume went up.

In January-October 2020, Italian consumers spent an average of 6,61 EUR for a kilogram of anchovy. A total of 13.497 tonnes of these species was consumed in the country in the same period.

In 2019, the EU exported 49.000 tonnes of coldwater shrimp to non-EU countries. Denmark was the biggest exporting Member State, while China is the main partner country.

EU imports from Mexico amounted to 34.591 tonnes for a value of EUR 113 million in 2019, where yellowfin tuna products (44% of total value) and octopus (21%) were the most imported products.

In early December, the European Commission lifted the yellow card imposed on Kiribati to address Kiribati's shortcomings in fisheries governance.



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“Blue Bioeconomy Outlook”
16 February 2021 | 15:00 (CET)

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1. First sales in Europe

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

1.1. January–October 2020 compared to the same period in 2019

Increases in value and volume: Estonia and Lithuania were the only surveyed countries that recorded an increase in both first-sales value and volume. In Estonia this was mainly due to a higher supply of pike-perch and herring, while in Lithuania it was due to higher supply of herring and sprat.

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

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

Country	January - October 2018		January - October 2019		January - October 2020		Change from January - October 2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	11.566	49,35	11.279	47,71	10.163	46,27	-10%	-3%
Bulgaria	2.652	1,81	4.472	2,35	2.205	1,33	-51%	-43%
Denmark	219.807	299,06	209.841	286,85	176.105	232,11	-16%	-19%
Estonia	37.572	9,18	47.227	10,60	50.449	13,37	7%	26%
France	159.734	529,78	150.903	509,74	129.270	431,20	-14%	-15%
Italy	79.823	290,67	80.822	310,38	69.479	262,29	-14%	-15%
Latvia	36.042	6,61	44.125	7,40	39.091	8,02	-11%	9%
Lithuania	1.333	1,05	730	0,59	1.800	0,74	147%	26%
Netherlands	309.184	468,37	221.437	334,21	202.509	302,45	-9%	-10%
Norway	2.576.727	2.147,88	2.405.521	2.231,60	2.593.243	2.161,82	8%	-3%
Poland	93.617	29,67	84.516	24,23	72.934	18,31	-14%	-24%
Portugal	105.567	220,02	112.812	233,98	89.178	197,48	-21%	-16%
Spain	419.108	1149,44	420.518	1183,01	420.973	1142,33	0%	-3%
Sweden	181.977	86,52	155.907	79,92	101.930	63,31	-35%	-21%
UK	211.387	400,95	243.260	507,74	252.532	411,05	4%	-19%

Possible discrepancies in % changes are due to rounding.

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

¹ Bivalves and other molluscs and aquatic invertebrates, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, salmonids, small pelagics, tuna and tuna-like species, and other marine fish.

² First sales data updated on 16.12.2020.

1.2. October 2020 compared to October 2019

Increases in value and volume: First sales increased in Estonia, Latvia, Lithuania, and Norway. Higher sales of herring were behind the sharp increases in Estonia, Latvia, and Lithuania. This trend was due to Council Regulation (EU) 2019/1838, namely the expiry of a restriction for cod fishing in Subdivisions 25 and 26 in the Baltic Sea, which was in force from 1 May to 31 August. Once the restriction had expired, it was possible to conduct fishing activities targeting other species such as herring or sprat. Increases in Norway were due to a higher supply of mackerel.

Decreases in value and volume: First sales fell in Bulgaria, France, Italy, Poland, Portugal, Spain, and Sweden. The significant decreases observed in Bulgaria were due to lower first-sales value of clam and first-sales volume of red mullet. A lower supply of herring led to a sharp first sales decrease in Sweden.

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

Country	October 2018		October 2019		October 2020		Change from October 2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.402	5,57	1.234	4,77	1.229	4,62	0%	-3%
Bulgaria	419	0,38	419	0,35	299	0,22	-29%	-36%
Denmark	30.333	43,55	36.898	49,46	37.036	43,38	0%	-12%
Estonia	5.009	1,31	8.351	1,97	10973	2,29	31%	16%
France	18.180	59,11	16.861	54,88	14.385	46,02	-15%	-16%
Italy	8.425	26,07	9.397	31,60	7.054	26,39	-25%	-16%
Latvia	8.328	1,39	5.050	0,91	6.883	1,56	36%	72%
Lithuania	115	0,10	9	0,01	417	0,12	4558%	1064%
Netherlands	30.449	52,44	23.709	37,65	23.428	38,06	-1%	1%
Norway	302.404	352,52	305.912	342,34	386.723	355,35	26%	4%
Poland	6.284	2,66	6.169	2,06	4.988	1,81	-19%	-12%
Portugal	11.979	22,54	15.429	22,23	11.797	20,43	-24%	-8%
Spain	45.542	120,76	44.172	116,45	35.283	95,82	-20%	-18%
Sweden	13.833	7,99	14.885	10,52	7.719	5,48	-48%	-48%
UK	27.374	65,54	33.899	69,64	39.662	60,51	17%	-13%

Possible discrepancies in % changes are due to rounding.

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

The most recent weekly first-sales data (**up to week 4 of 2021**) are available via the EUMOFA website, and can be accessed [here](#).

The most recent monthly first-sales data **for November 2020** are available via the EUMOFA website, and can be accessed [here](#).

1.3. First sales in selected countries

First sales data analysed in this section are extracted from EUMOFA³.

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


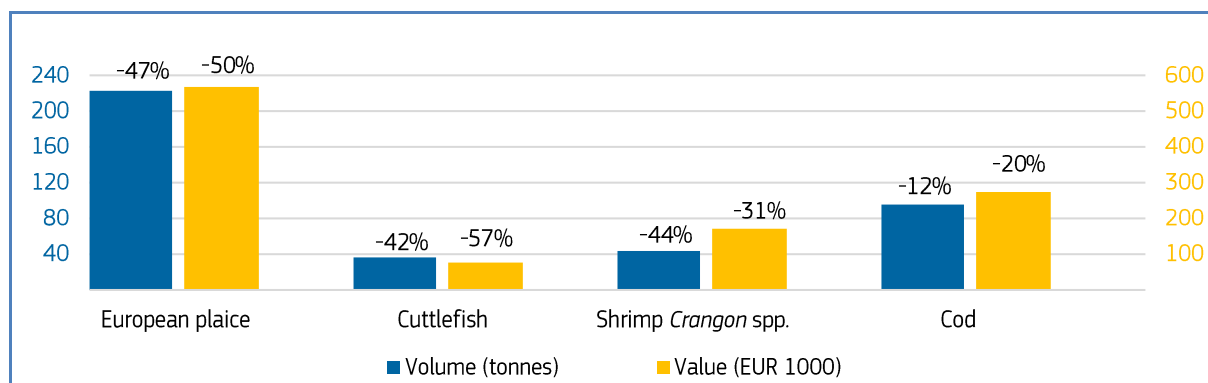

 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Oct 2020 vs Jan-Oct 2019	EUR 46,3 million, -3%	10.163 tonnes, -10%	European plaice, turbot, other sole* (i.e. other than common sole), shrimp <i>Crangon</i> spp., cod.	In a context of very good resource status, decrease in first sales of European plaice is mostly due to fishing strategies, although it might have been exacerbated by the COVID-19 crisis, which resulted in the closure of Belgium restaurants as from the 17th October 2020, as well as in the European HO.RE.CA. markets disruption.
Oct 2020 vs Oct 2019	EUR 4,6 million, -3%	1.229 tonnes, 0%	European plaice, cuttlefish, shrimp <i>Crangon</i> spp., cod.	

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



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

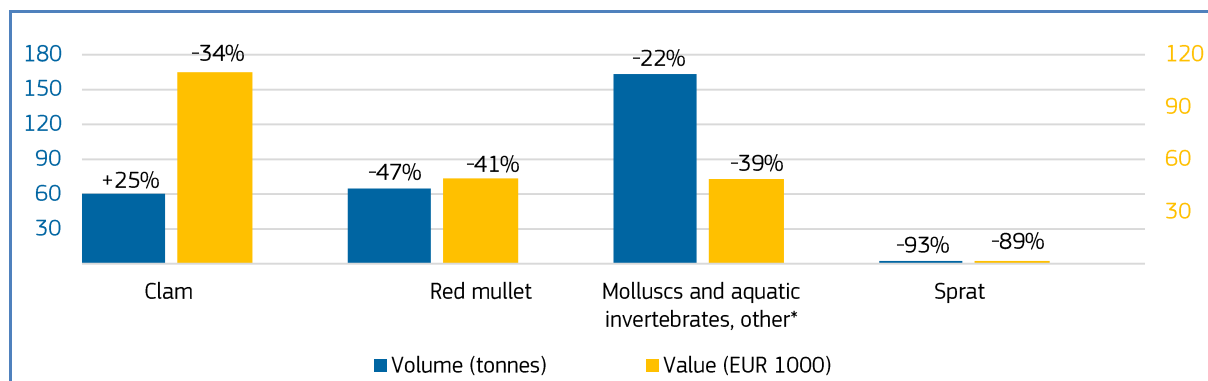
Table 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA**

 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2020 vs Jan-Oct 2019	EUR 1,3 million, -43%	2.205 tonnes, -51%	Molluscs and aquatic invertebrates (other)*, clam, red mullet.
Oct 2020 vs Oct 2019	EUR 0,2 million, -36%	299 tonnes, -29%	Clam, red mullet, molluscs and aquatic invertebrates (other)*, sprat.

³ First-sales data updated on 16.12.2020.

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

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

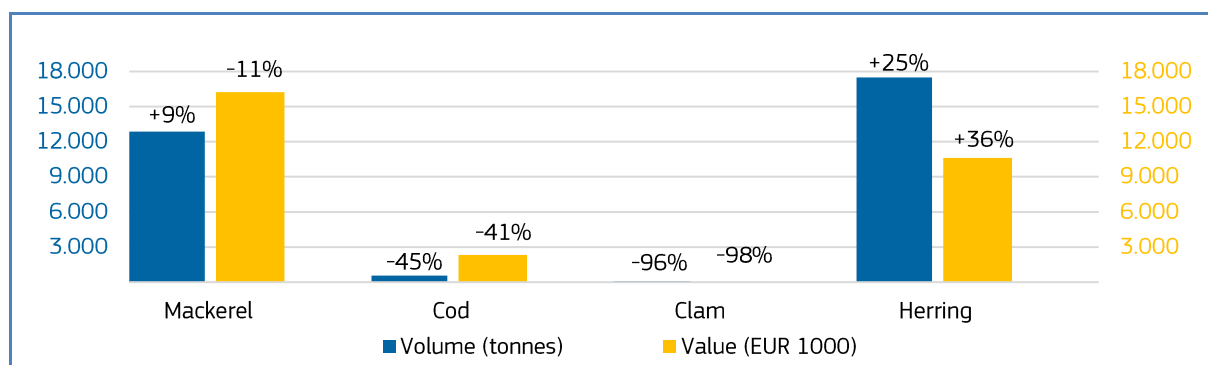


Percentages show change from the previous year. *EUMOFA aggregation for species. (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>)

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Oct 2020 vs Jan-Oct 2019	EUR 232,1 million, -19%	176.105 tonnes, -16%	Cod, Norway lobster, saithe, clam, monk, herring.	The category of clams which registered higher first sales decrease, is common cockle (Hjertemusling in Danish, <i>Cerastoderma edule</i>). Almost 100% of cockle landings in Denmark comes from the Limfjorden, where cockles are fished as a by-catch of mussel fishery, with a maximum daily cockle landing of 49% of total landings in weight per boat. In this context, a strong decrease (-41% in volume and -47% in value) has been observed in the mussel production between October 2019 (around 2.218 tons) and October 2020 (around 1.298 tons), leading to a drop in the associated clam production.
Oct 2020 vs Oct 2019	EUR 43,4 million, -12%	37.036 tonnes, 0%	Value: mackerel, cod, clam Volume: mackerel, herring.	

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



Percentages show change from the previous year.

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


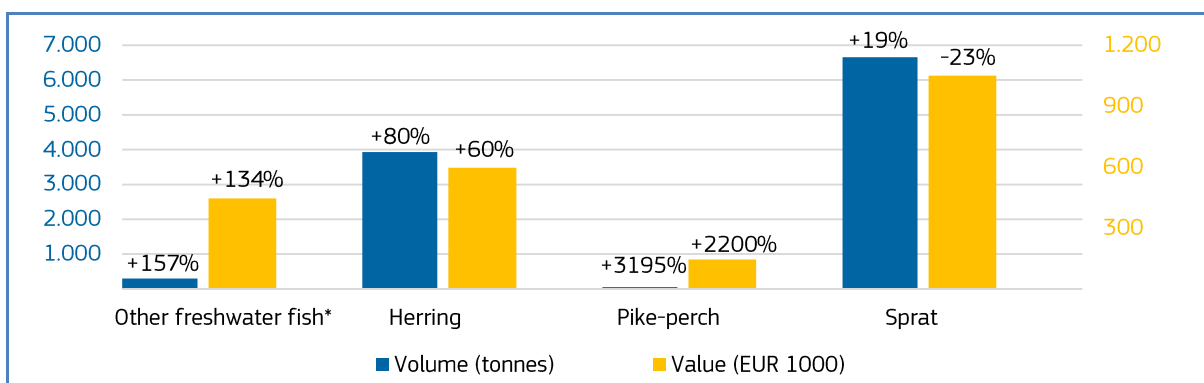
 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2020 vs Jan-Oct 2019	EUR 13,4 million, +26%	50.450 tonnes, +7%	Pike-perch, other freshwater fish*, herring, smelt.
Oct 2020 vs Oct 2019	EUR 2,3 million, +16%	10.973 tonnes, +31%	Other freshwater fish*, herring, pike-perch, sprat.

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



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

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


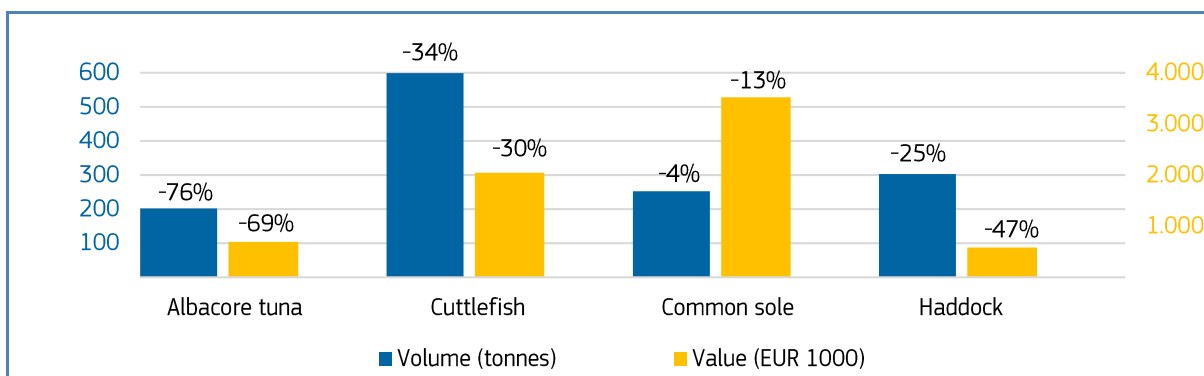
 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2020 vs Jan-Oct 2019	EUR 431,2 million, -15%	129.270 tonnes, -14%	Monk, hake, squid, albacore tuna, anchovy.
Oct 2020 vs Oct 2019	EUR 46,0 million, -16%	14.385 tonnes, -15%	Albacore tuna, cuttlefish, common sole, haddock.

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



Percentages show change from the previous year.

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


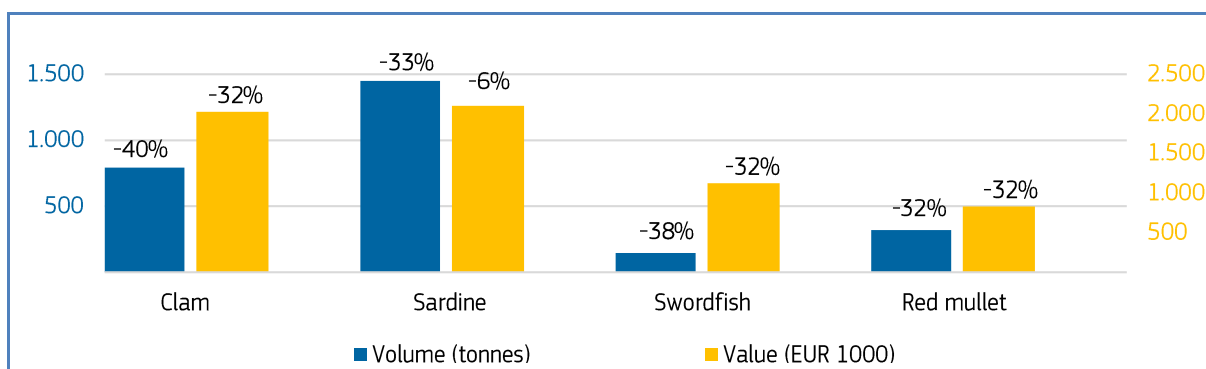
 Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2020 vs Jan-Oct 2019	EUR 262,3 million, -15%	69.479 tonnes, -14%	Miscellaneous shrimps*, anchovy, clam, cuttlefish, octopus, sardine.
Oct 2020 vs Oct 2019	EUR 26,4 million, -16%	7.054 tonnes, -25%	Clam, sardine, swordfish, red mullet.

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



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

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


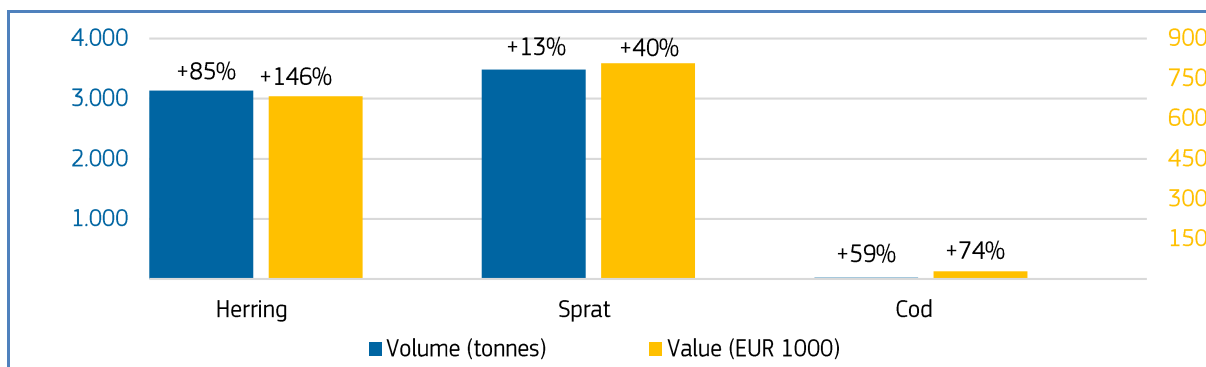
 Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Oct 2020 vs Jan-Oct 2019	EUR 8,0 million, +9%	39.091 tonnes, -11%	Value: herring, other freshwater fish*, other marine fish*, cod Volume: sprat, smelt, European flounder.	High increase in first sales of herring was linked with an expiration of restrictions laid down in COUNCIL REGULATION (EU) 2019/1838 of 30th October 2019. Additionally, demand for this species increased from abroad, so that suppliers intensified their activities on herring to satisfy export's demand.
Oct 2020 vs Oct 2019	EUR 1,6 million, +72%	6.883 tonnes, +36%	Herring, sprat, cod.	

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



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

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


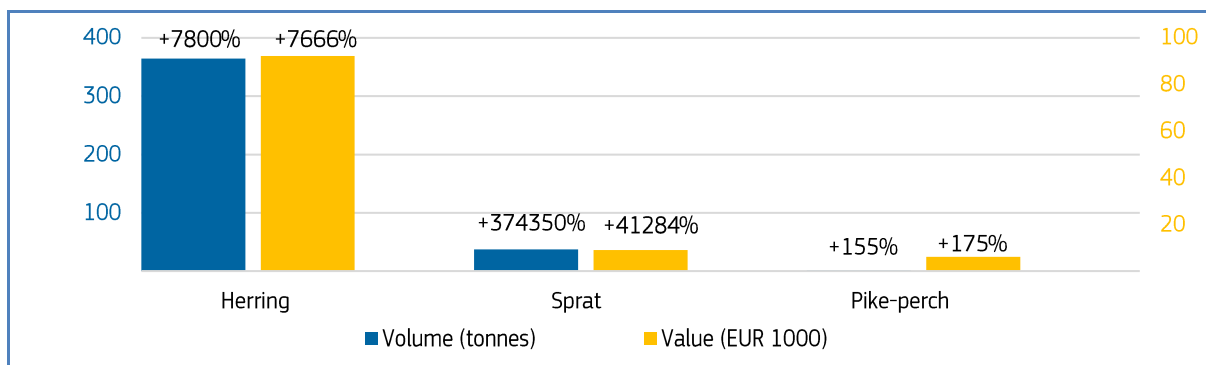

 Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species	Notes
Jan-Oct 2020 vs Jan-Oct 2019	EUR 0,7 million, +26%	1.800 tonnes, +147%	Herring, sprat, European flounder, pike-perch.	There were two main reasons behind the high increase in first sales of herring . The first was the expiry of restrictions ⁵ in fishing activities in the Baltic Sea. The second was that Latvian and Estonian fish processing companies have been expanding, and their respective owners, while investing in fish suppliers, purchased a subsidiary fish company in Lithuania. As herring catches in Lithuanian waters within the Baltic Sea are of higher quality the fishing activity focused in that area. It should be noticed that only 1% of caught herrings (2.093 kg) was sold to Lithuanian market for distribution. In addition, the reasonable weather condition in October 2020, the existing resources in fishing capacity and total allowable catches, satisfied market demand.
Oct 2020 vs Oct 2019	EUR 0,12 million, +1064%	417 tonnes, +4558%	Herring, sprat, pike-perch.	

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



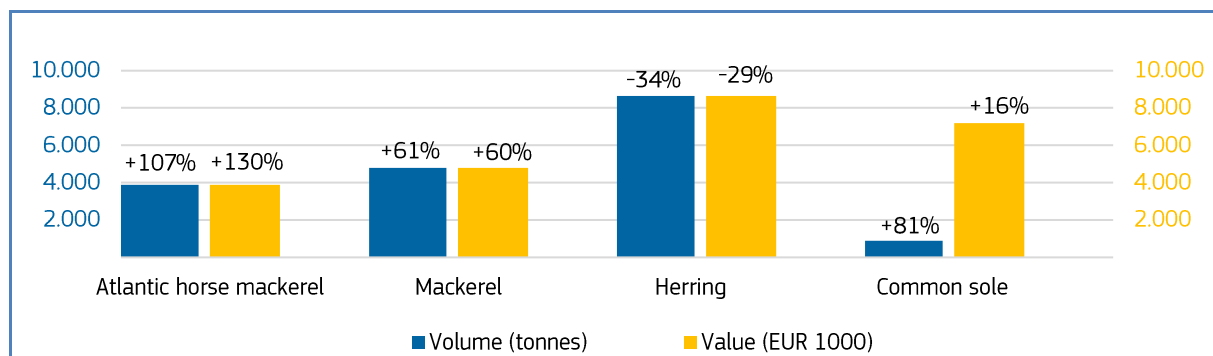
Percentages show change from the previous year. *EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

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

 the Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2020 vs Jan-Oct 2019	EUR 302,5 million, -10%	202.509 tonnes, -9%	Blue whiting, common sole, Atlantic horse mackerel, European plaice, herring.
Oct 2020 vs Oct 2019	EUR 38,1 million, +1%	23.428 tonnes, -1%	Value: Atlantic horse mackerel, mackerel, common sole Volume: herring.

⁵ COUNCIL REGULATION (EU) 2019/1838 https://eur-lex.europa.eu/eli/reg/2019/1838/oj#ntc2-L_2019281EN.01000901-E0002

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



Percentages show change from the previous year.

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


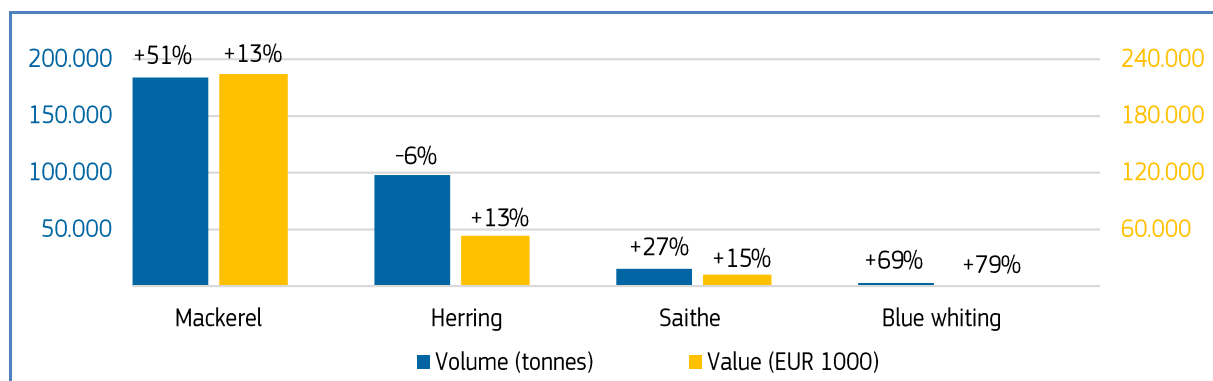
 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2020 vs Jan-Oct 2019	EUR 2.161,8 million, -3%	2.593.243 tonnes, +8%	Value: cod, coldwater shrimp, haddock. Volume: other groundfish*, mackerel, blue whiting.
Oct 2020 vs Oct 2019	EUR 355,4 million +4%	386.723 tonnes, +26%	Mackerel, herring, saithe, blue whiting.

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



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

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


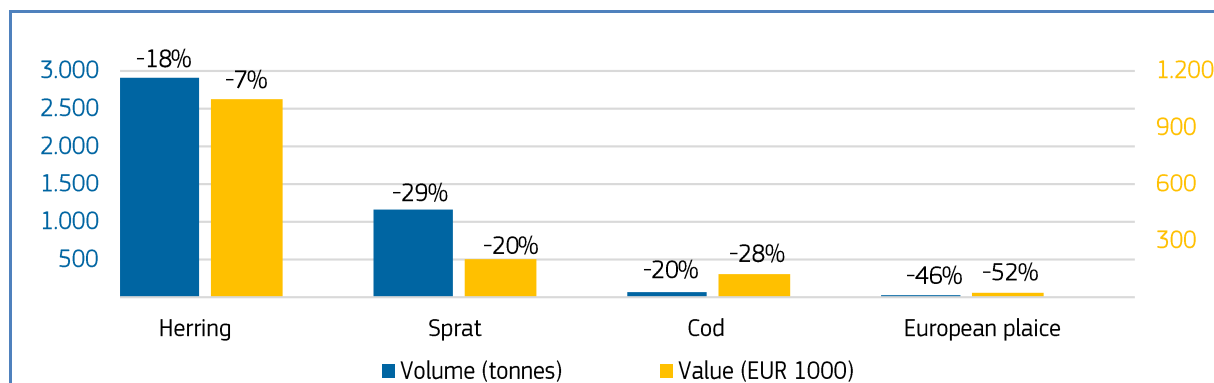
 Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2020 vs Jan-Oct 2019	EUR 18,3 million, -24%	72.934 tonnes, -14%	Cod, European flounder, sprat.
Oct 2020 vs Oct 2019	EUR 1,8 million -12%	4.988 tonnes, -19%	Herring, sprat, cod, European plaice.

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

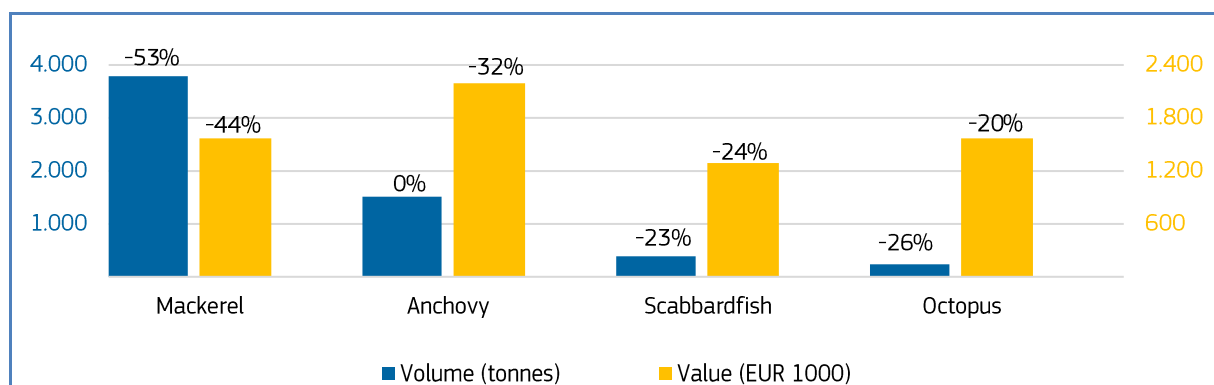


Percentages show change from the previous year.

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Oct 2020 vs Jan-Oct 2019	EUR 197,5 million, -16%	89.178 tonnes, -21%	Mackerel, anchovy, octopus, squid, Atlantic horse mackerel.	The “boom and bust” cycles of abundance of mackerel makes the decrease observed in 2020 as normal. The sardine campaign, which involves the same fleet that fishes mackerel, influences the catches of mackerel. Indeed, the sardine is a highly appreciated product in the Portuguese and Spanish markets and mackerel is one of its complementary products; so, fishers prefer to target sardine rather than mackerel. The lock-down measures and restrictions on mobility due to the COVID-19 crisis affected the consumption of this fish. Finally, the Portuguese mackerel is also supplied (frozen) for the tuna farms and their season is over in November. Therefore, the lower market demand combined with a good campaign for sardine explain the figures for this period.
Oct 2020 vs Oct 2019	EUR 20,4 million -8%	11.797 tonnes, -24%	Mackerel, anchovy, scabbardfish, octopus.	

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



Percentages show change from the previous year.

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


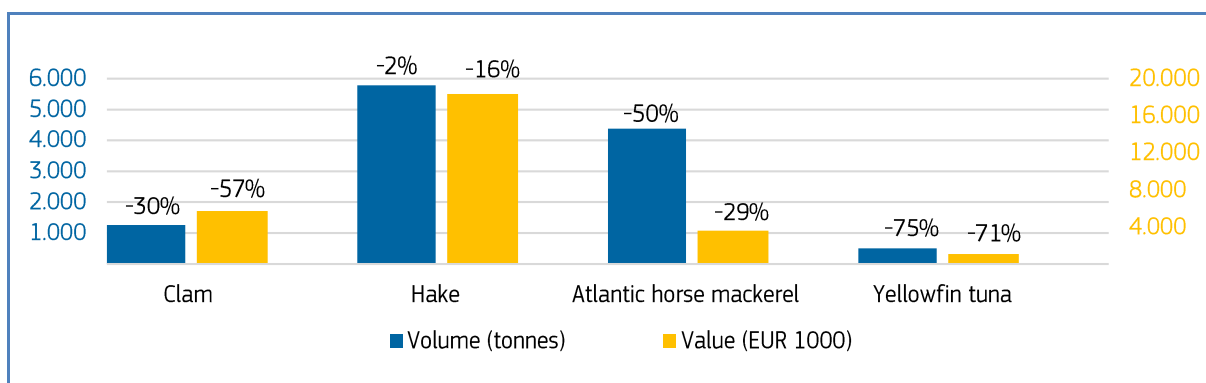
 Spain	First-sales value / trend in %	First-sales volume / trend %	Main contributing species
Jan-Oct 2020 vs Jan-Oct 2019	EUR 1.142,3 million, -3%	420.973 tonnes, 0%	Value: hake, octopus, clam. Volume: squid, mackerel, anchovy.
Oct 2020 vs Oct 2019	EUR 95,8 million, -18%	35.283 tonnes, -20%	Clam, hake, Atlantic horse mackerel, yellowfin tuna.

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



Percentages show change from the previous year.

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


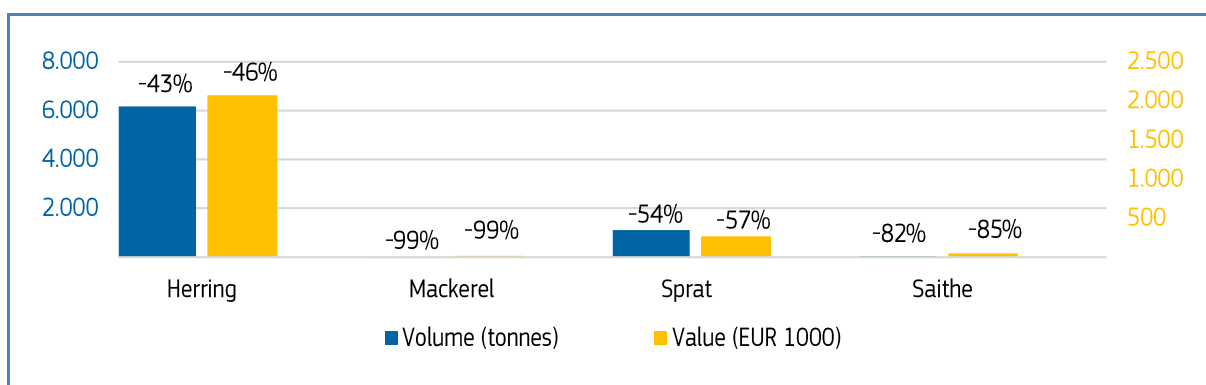
 Sweden	First-sales value / trend in %	First-sales volume / trend %	Main contributing species
Jan-Oct 2020 vs Jan-Oct 2019	EUR 63,3 million, -21%	101.930 tonnes, -35%	Herring, sprat, cod, mackerel.
Oct 2020 vs Oct 2019	EUR 5,5 million, -48%	7.719 tonnes, -48%	Herring, mackerel, sprat, saithe.

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



Percentages show change from the previous year.

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


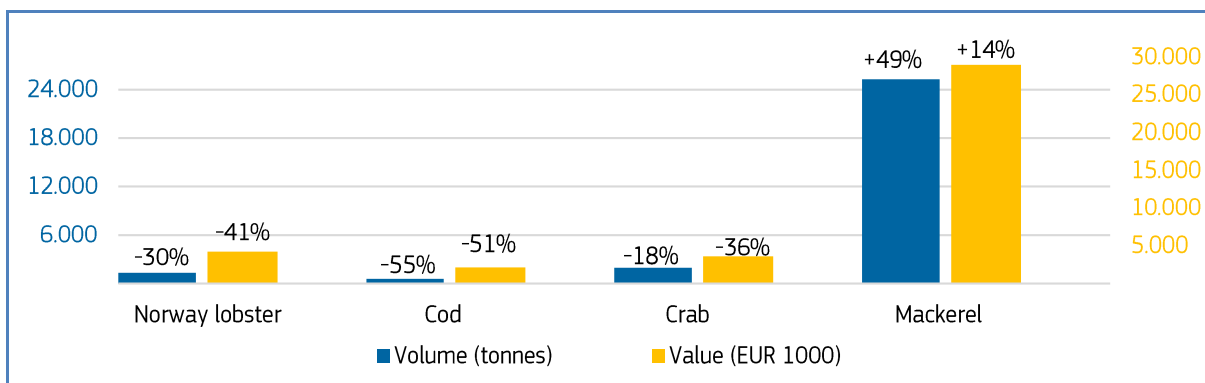
 the United Kingdom	First-sales value / trend %	First-sales Volume / trend %	Main contributing species
Jan-Oct 2020 vs Jan-Oct 2019	EUR 411,0 million, -19%	252.532 tonnes, +4%	Value: Norway lobster, crab, cod. Volume: mackerel, blue whiting.
Oct 2020 vs Oct 2019	EUR 60,5 million -13%	39.662 tonnes, +17%	Value: Norway lobster, cod, crab. Volume: mackerel.

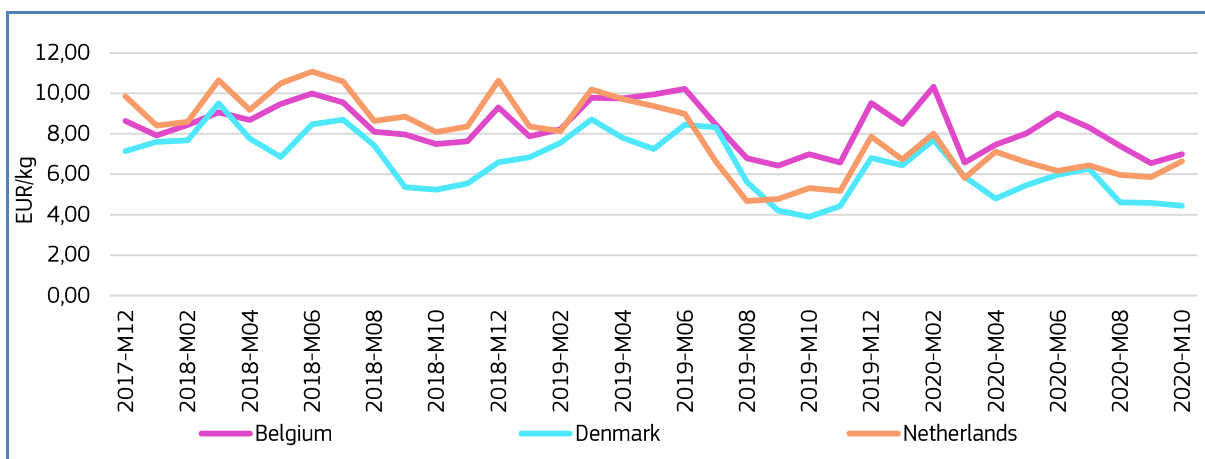
Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, OCTOBER 2020**



Percentages show change from the previous year.

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

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

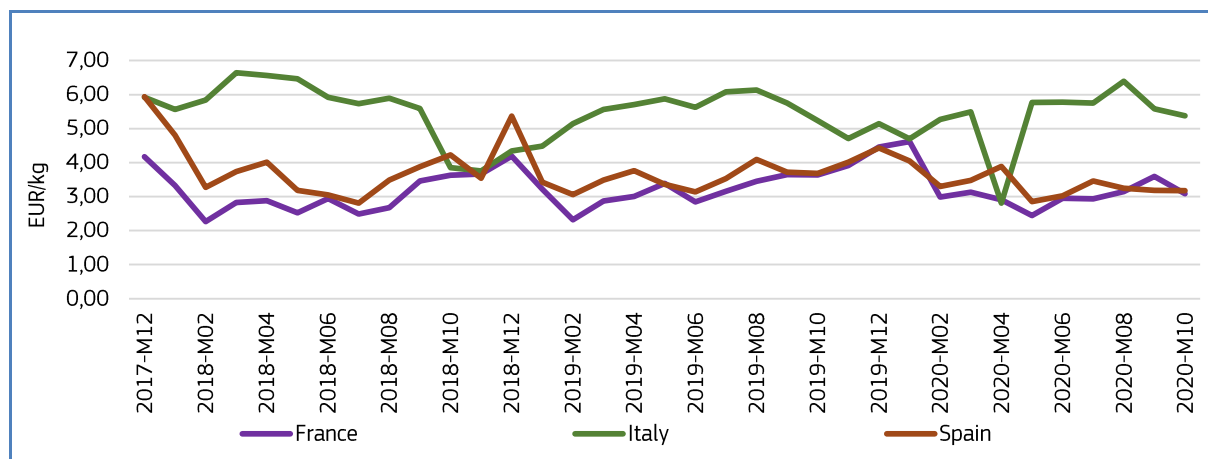


First sales of **brill** occur predominantly in **the Netherlands**, and to a lesser extent in **Belgium**, and **Denmark**. The average prices in October 2020 (the most recent available data) were: 7,00 EUR/kg in Belgium (up by 7% from the previous month and unchanged from the previous year); and 4,45 EUR/kg in Denmark (3% down from September 2020 and up by 14% from October 2019). In the Netherlands, the average price was 6,63 EUR/kg (up from both the previous month and year by 13% and 25%, respectively). In October 2020, first-sales volume remained stable in Belgium, increased slightly (+1%) in Denmark, and decreased by 14% in the Netherlands, from the previous year. Brill fisheries are seasonal, with similar peaks (October – November) for each of the three countries. Over the 36-month period, prices decreased in all three markets,

⁶ First sales data updated on 4.01.2021.

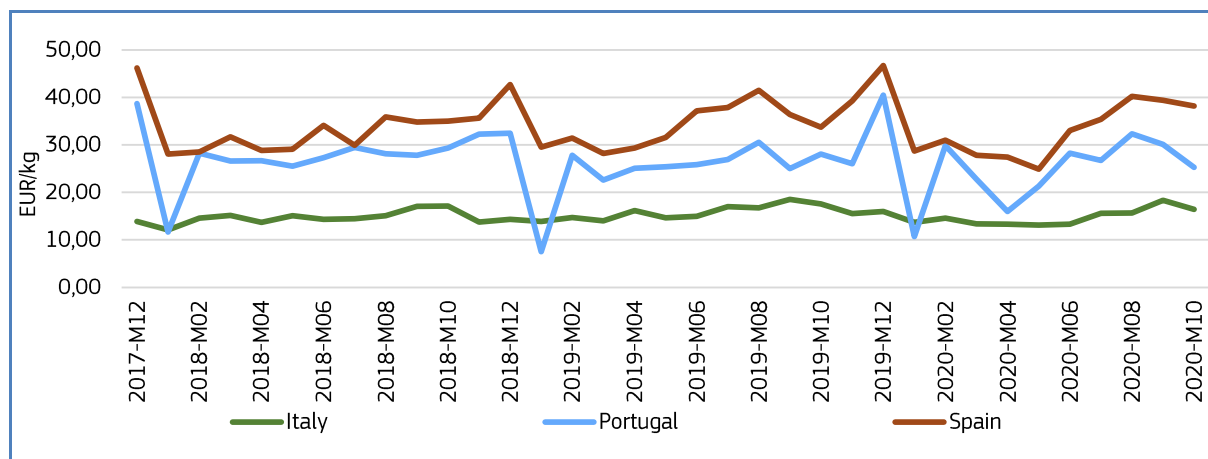
most notably in the Netherlands. During the same period, supply fell in Belgium, and increased slightly in Denmark, and the Netherlands.

Figure 17. **FIRST-SALES PRICES OF HAKE IN FRANCE, ITALY, AND SPAIN**



EU first sales of **hake** occur in multiple countries, including **France, Italy, and Spain**. In October 2020, the average first-sales prices of hake were: 3,08 EUR/kg in France (down from both the previous month and year by 14% and 15%, respectively); 5,38 EUR/kg in Italy (4% lower than September 2020, and up by 3% from October 2019); and 3,17 EUR/kg in Spain (unchanged from September 2020, and 14% lower than October 2019). In October 2020, supply increased in France (+8%) and decreased in Italy (-6%) and Spain (-2%) from October 2019. Over the past 36 months, hake prices have increased in France, and decreased in Italy and Spain. Over the same period, supply decreased in each of the three markets. First-sales volume is seasonal, with different peaks, in all three countries.

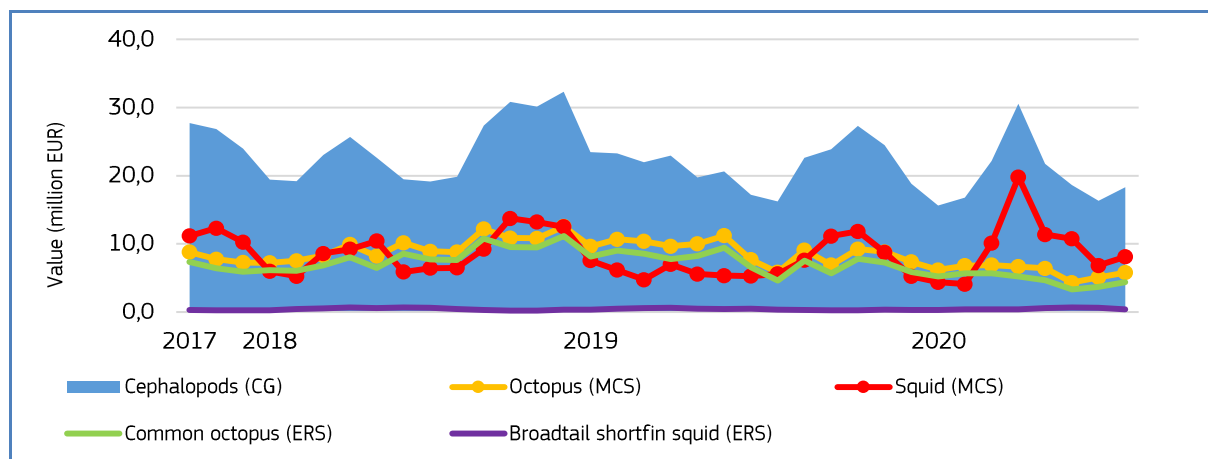
Figure 18. **FIRST-SALES PRICES OF BLUE AND RED SHRIMP IN ITALY, PORTUGAL, AND SPAIN**



EU first sales of **blue and red shrimp** (*Aristeus antennatus*) occur in **Italy, Portugal, and Spain**. In October 2020, the average first-sales prices of blue and red shrimp were: 16,46 EUR/kg in Italy (down from both the previous month and year by 10% and 6%, respectively); 25,27 EUR/kg in Portugal (16% lower than September 2020, and 10% lower than October 2019); 38,19 EUR/kg in Spain (down by 3% from September 2020 and up by 13% from October 2019). In October 2020, supply decreased in all three countries compared to October 2019: in Italy by 28%, Portugal by 53%, and Spain by 22%. Over the past 36-month period, prices increased in Italy and Spain, and decreased in Portugal. During the same period, supply increased in each of the three countries. Supply is seasonal, with similar peaks across the three countries between June and August.

1.5. Commodity group of the month: cephalopods⁷

Figure 19. **FIRST-SALES COMPARISON AT CG LEVEL, MCS LEVEL, AND ERS LEVEL FOR REPORTING MEMBER STATE COUNTRIES⁸, NOVEMBER 2017 - OCTOBER 2020**



The “**cephalopods**” commodity group (CG⁹) recorded the eighth-highest first-sales value and volume out of the 10 CGs recorded in October 2020¹⁰. First sales reached a value of EUR 18,3 million and a volume of 3,644 tonnes, representing decreases of 19% and 12%, respectively, from October 2019. In the past 36 months, the highest first-sales value of cephalopods was registered at EUR 32,3 million (January 2019).

The cephalopods commodity group includes four main commercial species (MCS): cuttlefish, octopus, squid, and other cephalopods.

At Electronic Recording and Reporting System (ERS) level, common octopus (24%) and broadtail shortfin squid (2%) together accounted for 26% of cephalopods’ total first-sales value recorded in October 2020.

1.6. Focus on common octopus



Common octopus (*Octopus vulgaris*) is a benthic mollusc species that belongs to the “cephalopods” commodity group. As a cosmopolitan species, it lives in temperate and tropical waters around the world, from the Atlantic, to the Mediterranean Sea and the southern coast of England, down to the southern coast of South Africa. Its main habitats are along coastlines, and among rocks, reefs, and grass beds. Octopus has a limited seasonal migration, usually overwintering in deeper waters and moving to shallower waters during summer. Spawning peaks occur in April–July in the Mediterranean Sea. Octopus can reach a total length of 1,2 m for females and 1,3 m for males. It can grow to a maximum weight of 10 kg, although its average weight is 3 kg. This species has a life cycle of 12-14 months.

Octopus is a very popular seafood species, particularly in Mediterranean countries. It is mainly fished by coastal trawlers and artisanal fisheries that catch common octopus with pots and traps (FPO). A small percentage are captured by small-scale fleets with trammel nets, hooks and other fishing gears. Although these fisheries are regulated by national and regional rules, octopus is a difficult resource to manage due to its biological characteristics¹¹. In the EU, a minimum catch size for octopus is set at 750 g (whole) and 450 g (gutted) in European waters, except for in the Skagerrak/Kattegat region, to help

⁷ First sales data updated on 16.12.2020.

⁸ Norway and the UK excluded from the analyses.

⁹ Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

¹⁰ More data on commodity groups can be found in Table 1.2 of the Annex.

¹¹ https://www.frontiersin.org/10.3389/conf.fmars.2019.08.00067/event_abstract

protect the species¹². However, some EU countries have more restricted technical measures, such as Croatia, where the minimum catch size for octopus is 1 kg¹³.

Common octopus is marketed fresh, frozen, dried, salted, smoked, and canned¹⁴.

We have covered **common octopus** in previous *Monthly Highlights*:

First sales: MH 8/2018 (France, Italy, Portugal), MH 6/2017 (France, Italy, Portugal), MH 3/2016 (Portugal), MH 1/2015 (Portugal), MH February/2013 (Portugal); MH August-September/2013 (Portugal)

Topic of the month: MH 8/2018 “Octopus in the EU”, MH June/2013 “Octopus in Portugal”.

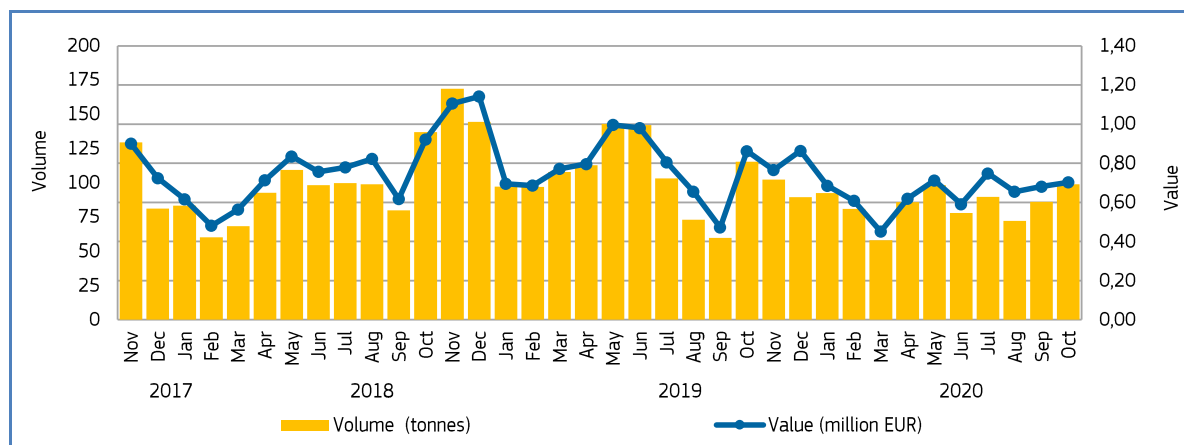
Trade: 4/2015, 11/2016 Extra-EU import.

Selected countries

Table 18. **COMPARISON OF COMMON OCTOPUS FIRST-SALES PRICES, MAIN PLACES OF SALE AND CONTRIBUTION TO OVERALL SALES OF CEPHALOPODS IN ITALY, PORTUGAL, AND SPAIN.**

Common octopus		Changes in first sales of common octopus Jan-Oct 2020 (%)		Contribution of common octopus to total cephalopods first sales in October 2020 (%)	Principal places of sale Jan-Oct 2020 in terms of first-sales value
		Compared to Jan-Oct 2019	Compared to Jan-Oct 2018		
Italy	Value	-16%	-9%	21%	Lampedusa, Anzio, Fiumicino.
	Volume	-20%	-9%	21%	
Portugal	Value	-23%	-34%	66%	Olhão, Sesimbra, Portimão.
	Volume	-21%	-19%	64%	
Spain	Value	-48%	-33%	29%	Isla Cristina, Ayamonte, Santa Eugenia de Ribeira.
	Volume	-46%	-1%	21%	

Figure 20. **COMMON OCTOPUS: FIRST SALES IN ITALY, NOVEMBER 2017 – OCTOBER 2020**



¹² REGULATION (EU) 2019/1241 <https://eur-lex.europa.eu/eli/reg/2019/1241/oj>

¹³ https://narodne-novine.nn.hr/clanci/sluzbeni/2017_12_122_2785.html

¹⁴ <http://www.fao.org/fishery/species/3571/en>

Over the past 36 months, the highest first sales of common octopus in **Italy** occurred in November and December 2018. Taking into account the short lifespan of octopus, catch fluctuates on a yearly basis, as do first sales as a result.

Figure 21. **FIRST SALES: COMPOSITION OF CEPHALOPODS (ERS LEVEL) IN ITALY IN VALUE AND VOLUME, OCTOBER 2020**

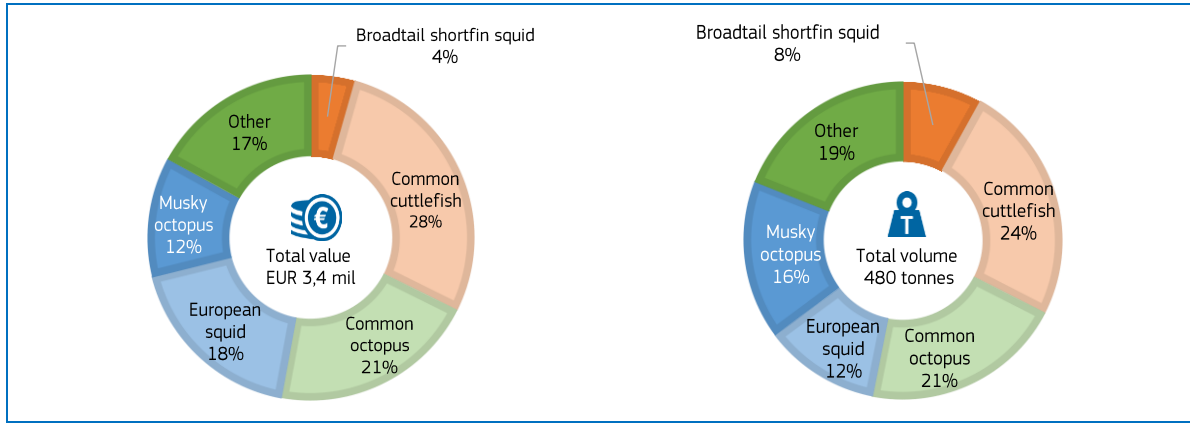
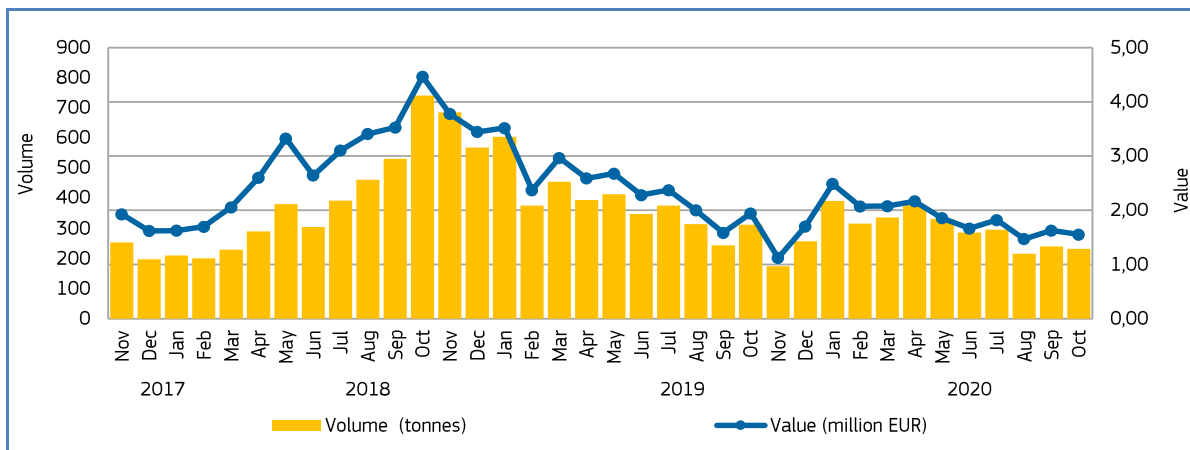


Figure 22. **COMMON OCTOPUS: FIRST SALES IN PORTUGAL, NOVEMBER 2017-OCTOBER 2020**



Octopus vulgaris is one of the most important fishing resources for Portugal, especially for the small-scale fishing fleet. Over the past 36 months, the highest first sales of common octopus in Portugal occurred in October 2018, when 741 tonnes were registered.

Figure 23. **FIRST SALES: COMPOSITION OF CEPHALOPODS (ERS LEVEL) IN PORTUGAL IN VALUE AND VOLUME, OCTOBER 2020**

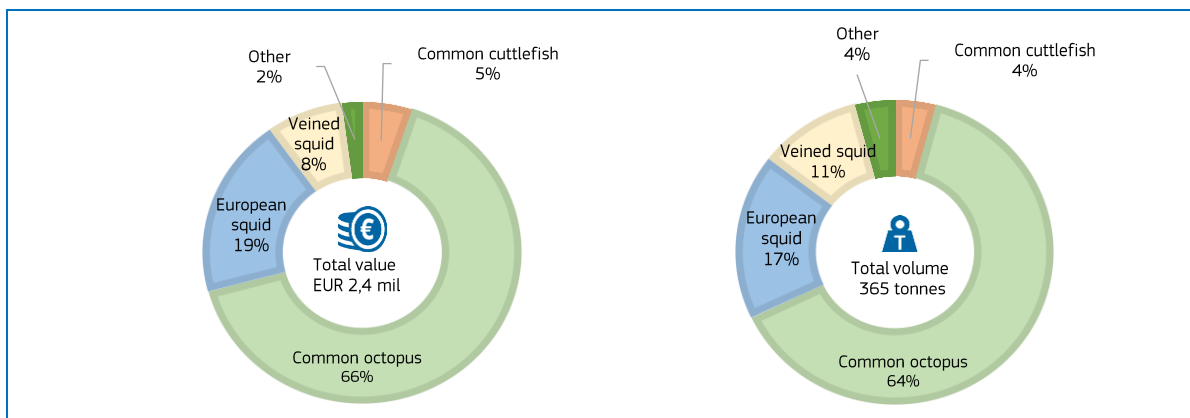
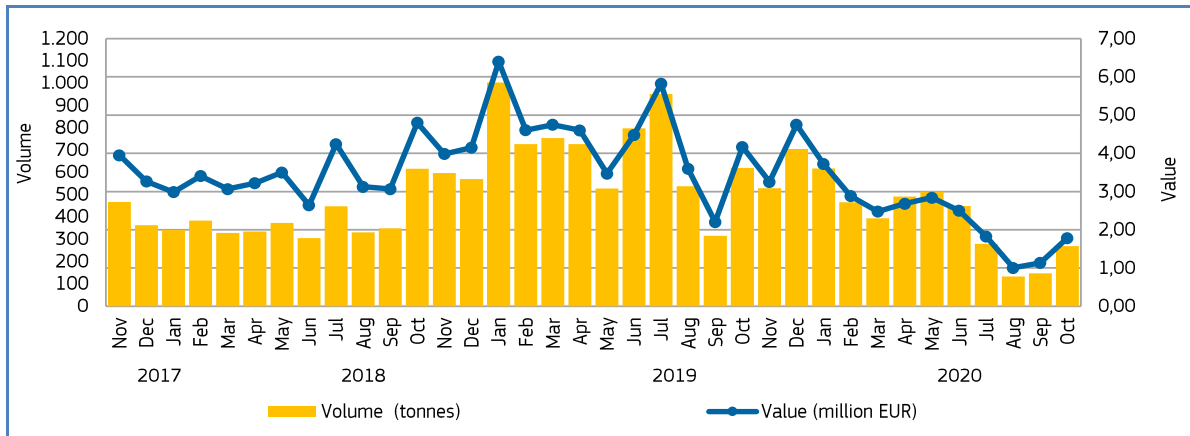
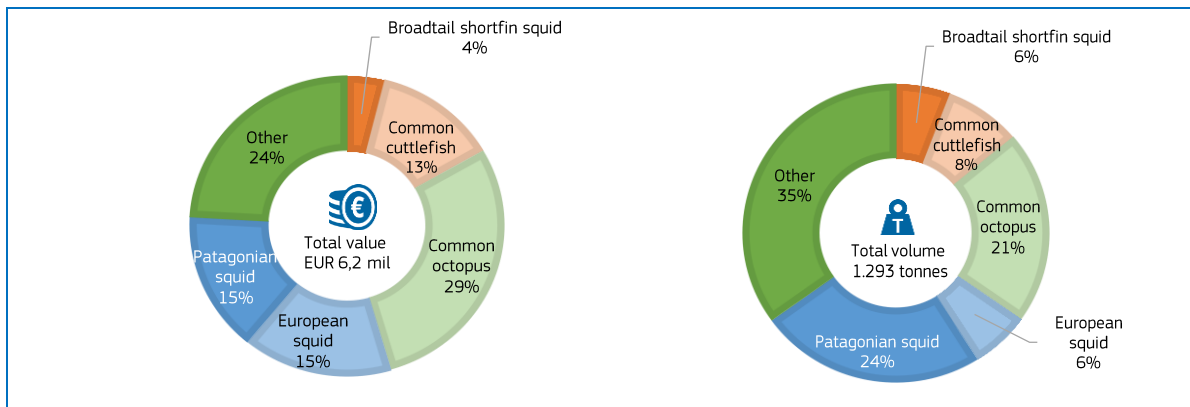


Figure 24. **COMMON OCTOPUS: FIRST SALES IN SPAIN, NOVEMBER 2017-OCTOBER 2020**



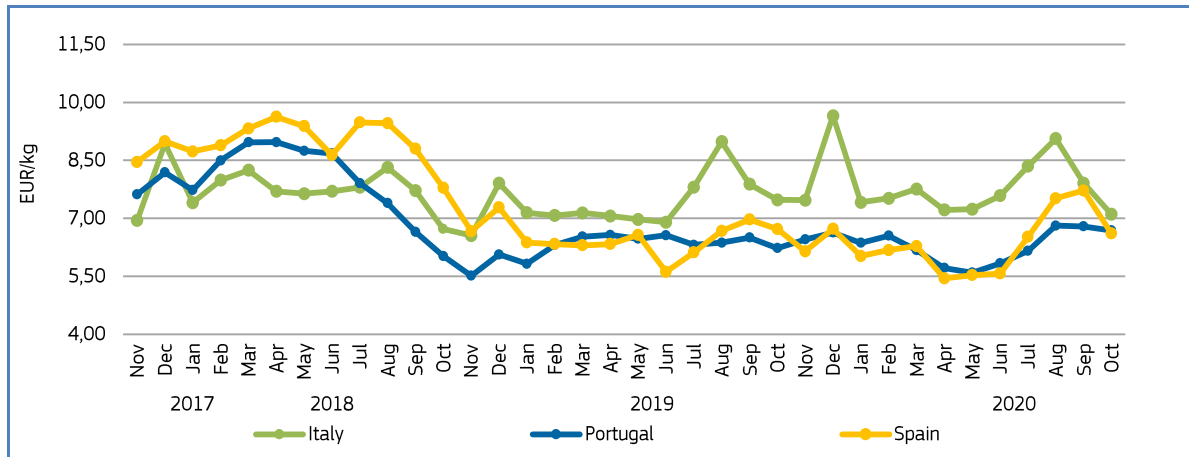
Over the past 36 months in **Spain**, the highest first sales of common octopus occurred during 2019, peaking in January when 1.004 tonnes were sold. In 2020 first sales decreased, with as little as 134 and 147 tonnes sold in August and September, respectively.

Figure 25. **FIRST SALES: COMPOSITION OF CEPHALOPODS (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, OCTOBER 2020**



Price trend

Figure 26. **COMMON OCTOPUS: FIRST-SALES PRICES IN SELECTED COUNTRIES, NOVEMBER 2017–OCTOBER 2020**



Over the 36-month observation period (November 2017 to October 2020), the average first-sales price of common octopus in **Italy** was 7,68 EUR/kg, 12% higher than in **Portugal** (6,84 EUR/kg) and 6% above that in **Spain** (7,27 EUR/kg).

In **Italy** in October 2020, the average first-sales price of common octopus (7,11 EUR/kg) decreased by 5% from October 2019 and increased by 6% compared with October 2018. During the past 36 months, average price ranged from 6,55 EUR/kg for 169 tonnes in November 2018, to 9,65 EUR/kg for 89 tonnes in December 2019.

In **Portugal** in October 2020, the average first-sales price of common octopus (6,69 EUR/kg) increased by 7% compared to October 2019, and by 11% compared to October 2018. During the observed period, the lowest average price of 5,52 EUR/kg was seen in November 2018, for a volume of 685 tonnes, while the highest average price was recorded in March and April 2018 at 8,97 EUR/kg for 229 and 290 tonnes, respectively.

In **Spain** in October 2020, the average first-sales price of common octopus (6,61 EUR/kg) decreased by 2% compared to October 2019 and by 15% relative to October 2018. During the observed period, the lowest average price (5,45 EUR/kg for 492 tonnes) was seen in April 2020, while the highest average price was recorded in April 2018 at 9,62 EUR/kg, for 335 tonnes.

1.7. Focus on broadtail shortfin squid



Broadtail shortfin squid (*Illex coindetii*) is a species of neritic squids in the family Ommastrephidae. It can be found in the Mediterranean Sea and across the North Atlantic Ocean. It lives at depths of 200 to 600 m at muddy, sandy, and silty bottoms. The dominant prey of broadtail shortfin squid

includes fish, crustaceans, and other cephalopods. The species spawns throughout the year, though seasonal peaks have been observed in spring and summer.

Illex coindetii is one of the two squid species most frequently fished for human consumption in the north-eastern and central Atlantic, most notably in Spain and Portugal. The species is generally a by-catch of important fisheries operating within the Mediterranean and the eastern Atlantic. It is mainly caught by trawlers, but it is also found in the catch of other gear types including seine, artisanal fisheries, longlines and jigs¹⁵.

¹⁵ <http://digital.csic.es/bitstream/10261/25654/1/w9000e04.pdf>

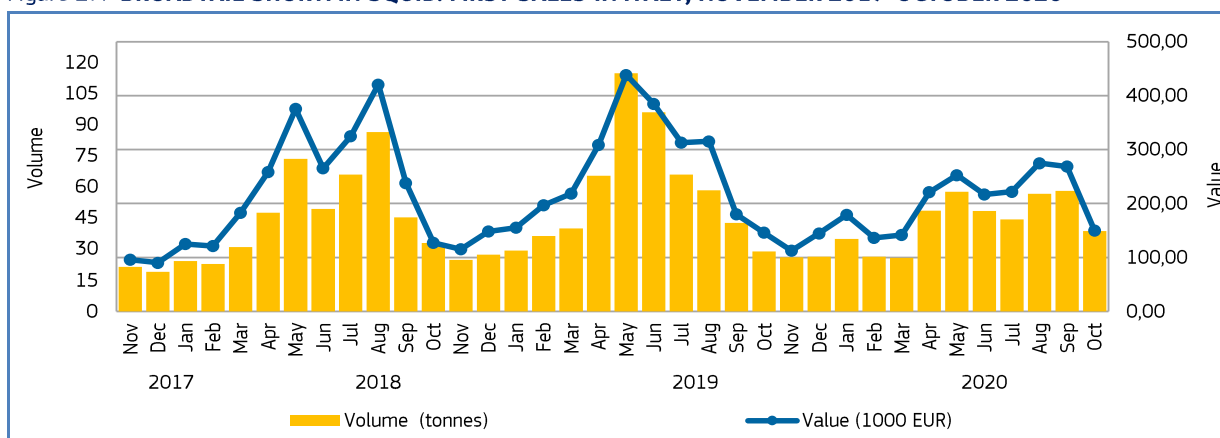
The high spatial and inter-annual variation in ommastrephid landings, along with the mixed landings primarily of the species broadtail shortfin squid (*Illex coindetii*) and lesser flying squid (*Todaropsis eblanae*), are two of the characteristics of the ommastrephid fisheries throughout the Mediterranean and the Eastern Atlantic¹⁶.

Selected countries

Table 19. **COMPARISON OF BROADTAIL SHORTFIN SQUID FIRST-SALES PRICES, MAIN PLACES OF SALE AND CONTRIBUTION TO OVERALL SALES OF CEPHALOPODS IN ITALY AND SPAIN.**

Broadtail shortfin squid		Changes in first sales of broadtail shortfin squid Jan-Oct 2020 (%)		Contribution of broadtail shortfin squid to total cephalopods first sales in October 2020 (%)	Principal places of sales in Jan-Oct 2020 in terms of first-sales value
		Compared to Jan-Oct 2019	Compared to Jan-Oct 2018		
Italy	Value	-22%	-15%	4%	Porto Santo Stefano, Civitavecchia, Manfredonia.
	Volume	-24%	-8%	8%	
Spain	Value	+33%	+1%	4%	Villajoyosa, Cambrils, Tarragona.
	Volume	+41%	-10%	6%	

Figure 27. **BROADTAIL SHORTFIN SQUID: FIRST SALES IN ITALY, NOVEMBER 2017-OCTOBER 2020**

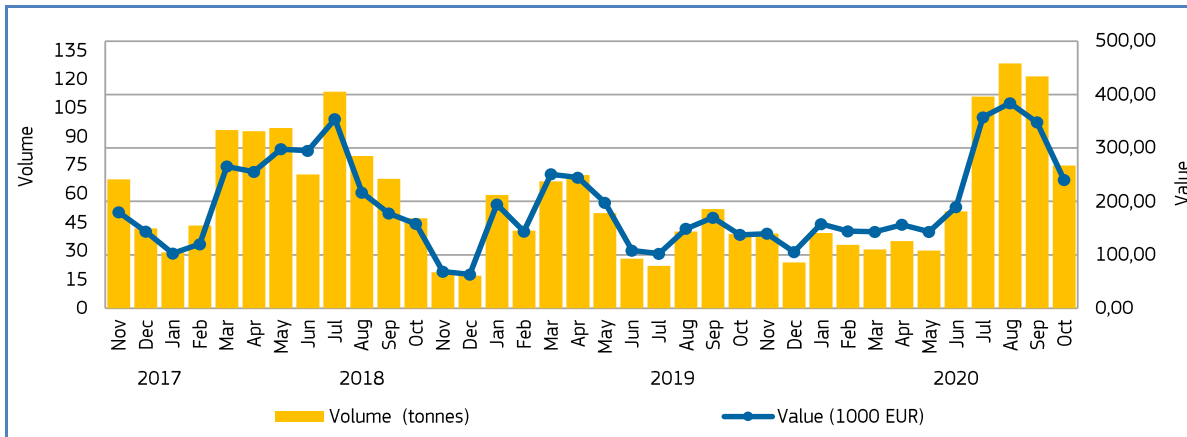


In **Italy**, commercial fishing of broadtail shortfin squid fluctuates throughout the year, with highest first sales typically occurring during warmer months (spring, summer), when the fishery is at its peak. The species is caught mainly as by-catch by trawlers that target deep-water rose shrimp and hake¹⁷.

¹⁶https://www.academia.edu/30620593/A_comparison_of_the_fishery_biology_of_three_Illex_coindetii_Verany_1839_Cephalopoda_Ommastrep_hidae_populations_from_the_European_Atlantic_and_Mediterranean_

¹⁷ <http://digital.csic.es/bitstream/10261/25654/1/w9000e04.pdf>

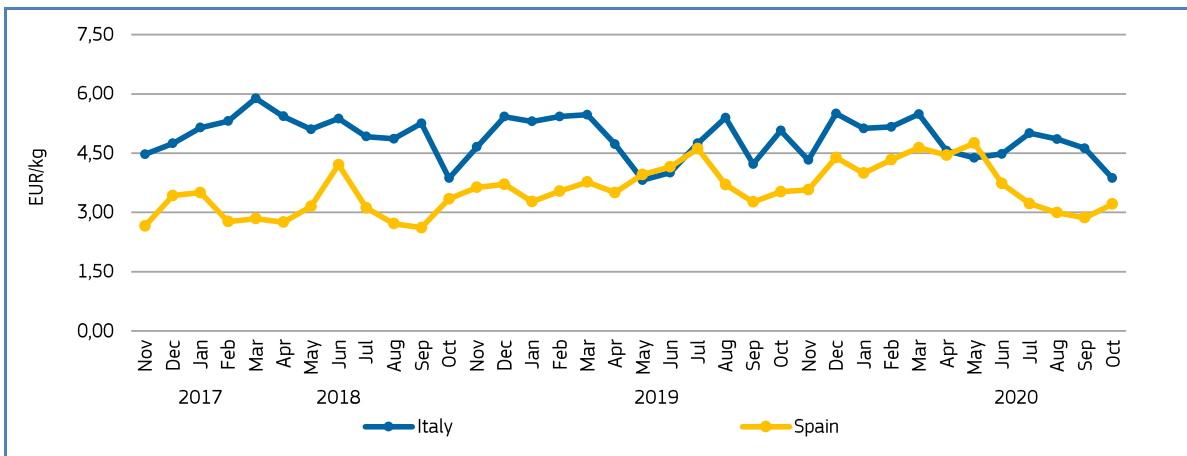
Figure 28. **BROADTAIL SHORTFIN SQUID: FIRST SALES IN SPAIN, NOVEMBER 2017-OCTOBER 2020**



In **Spain**, over the past 36 months (November 2017 – October 2020) the broadtail shortfin squid fishery fluctuated regularly, with the highest first sales registered during warmer months – especially from July to September 2020.

Price trend

Figure 29. **BROADTAIL SHORTFIN SQUID: FIRST-SALES PRICE IN SELECTED COUNTRIES, NOVEMBER 2017-OCTOBER 2020**



Over the 36-month observation period (November 2017 – October 2020), the average first-sales price of broadtail shortfin squid in **Italy** was 4,89 EUR/kg, 38% higher than in **Spain** (3,55 EUR/kg).

In **Italy** in October 2020, the average first-sales price of broadtail shortfin squid (3,87 EUR/kg) decreased by 24% compared to October 2019 and remained unchanged compared to October 2018. The lowest average price was registered in May 2019 at 3,82 EUR/kg for 115 tonnes, which was the highest volume recorded in the observed 36 months. The highest average price at 5,89 EUR/kg for 31 tonnes was registered in March 2018.

In **Spain**, in October 2020 the average first-sales price of broadtail shortfin squid was 3,21 EUR/kg, 9% and 4% lower than in October 2019 and 2018, respectively. The lowest price in the past 36 months was registered in September 2018, at 2,61 EUR/kg for 68 tonnes. The highest price (4,75 EUR/kg for 30 tonnes) was observed in May 2020.

2. Extra-EU imports

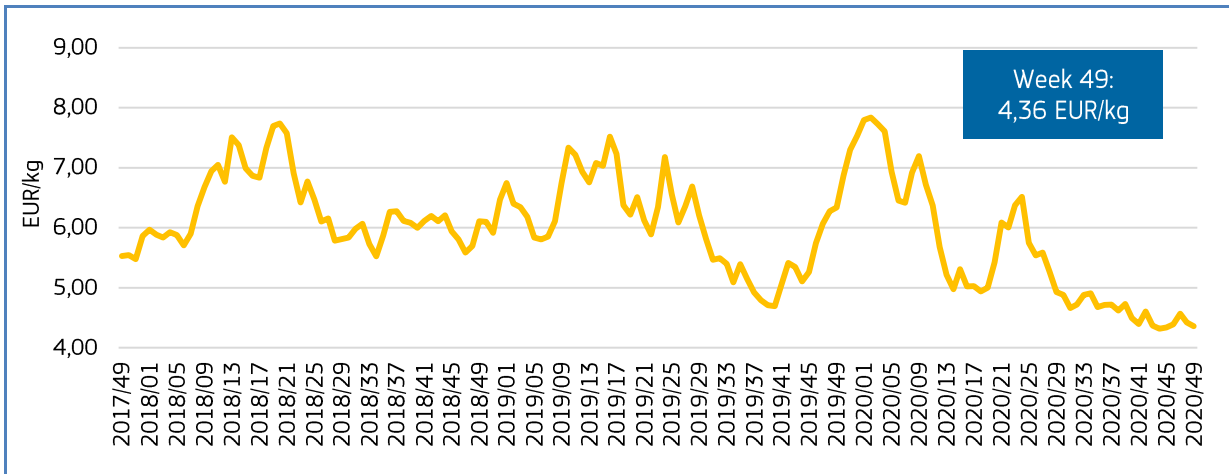
Every month, weekly extra-EU import prices (average values per week, in EUR per kg) are examined for nine different species. The three most relevant species in terms of value and volume remain consistent, and are examined every month: fresh whole Atlantic salmon from Norway, frozen Alaska pollock fillets from China, and frozen tropical shrimp (*Penaeus spp.*) from Ecuador. The other six species change each month. Three are chosen from the commodity group of the month, which this month is cephalopods. The featured commodity species this month are: frozen cuttlefish and frozen squid, both from Morocco, and other frozen squid from India. The remaining three species examined each month are randomly selected and, this month, include frozen fillets of catfish from Vietnam, frozen lobster, whole, from Canada, and fresh or chilled lesser or Greenland halibut from Norway.

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

Extra-EU Imports		Week 49/2020	Preceding 4-week average	Week 49/2019	Notes
Fresh whole Atlantic salmon imported from Norway (<i>Salmo salar</i> , CN code 03021440)	Price (EUR/kg)	4,36	4,43 (-2%)	6,34 (-31%)	Lower prices in November 2020 than the same month in previous years. Downward trend in 2020, (most notably since June), due to a combination of increased export volume and reduced demand from the restaurant sector and increase in European production.
	Volume (tonnes)	18.204	16.119 (+13%)	14.695 (+24%)	Higher volumes in November 2020 than the same month in previous years. Upward trend from 2017 to 2020.
Frozen Alaska pollock fillets imported from China (<i>Theragra chalcogramma</i> , CN code 03047500)	Price (EUR/kg)	2,44	2,43 (0%)	2,85 (-14%)	November 2020 prices were lower than the same month in the previous year, but higher than November 2018. Upward trend in 2020, but consistent fall in price since week 26 of 2020.
	Volume (tonnes)	2.667	2.862 (-7%)	4.696 (-43%)	Fluctuations in supply. Lower volumes in November 2020 than the same month in previous years. Downward trend from 2017 to 2020.
Frozen tropical shrimp imported from Ecuador (genus <i>Penaeus</i> , CN code 03061792)	Price (EUR/kg)	5,31	4,92 (+8%)	6,02 (-12%)	Downward trend from 2017 to 2020. Average price in November 2020 distinctively lower than October 2018 and 2019.
	Volume (tonnes)	1.549	3.075 (-50%)	1.435 (+8%)	Fluctuations in supply. Upward trend from 2017 to 2020. Volumes in November 2020 substantially higher compared with the same month in 2018 and 2019.

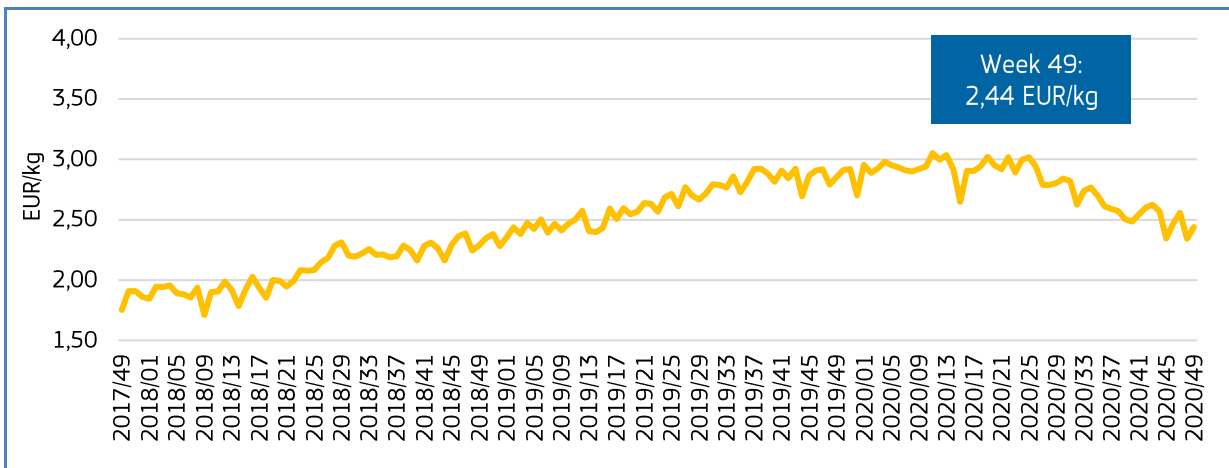
Source: European Commission (updated 16.12.2020).

Figure 30. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY, 2017 – 2020**



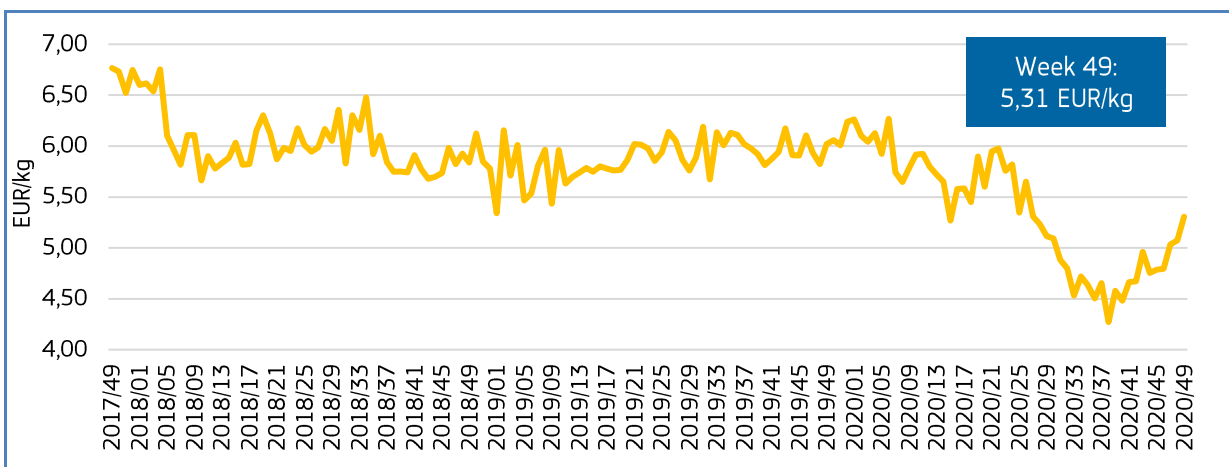
Source: European Commission (updated 16.12.2020).

Figure 31. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2017 – 2020**



Source: European Commission (updated 16.12.2020).

Figure 32. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2017 – 2020**



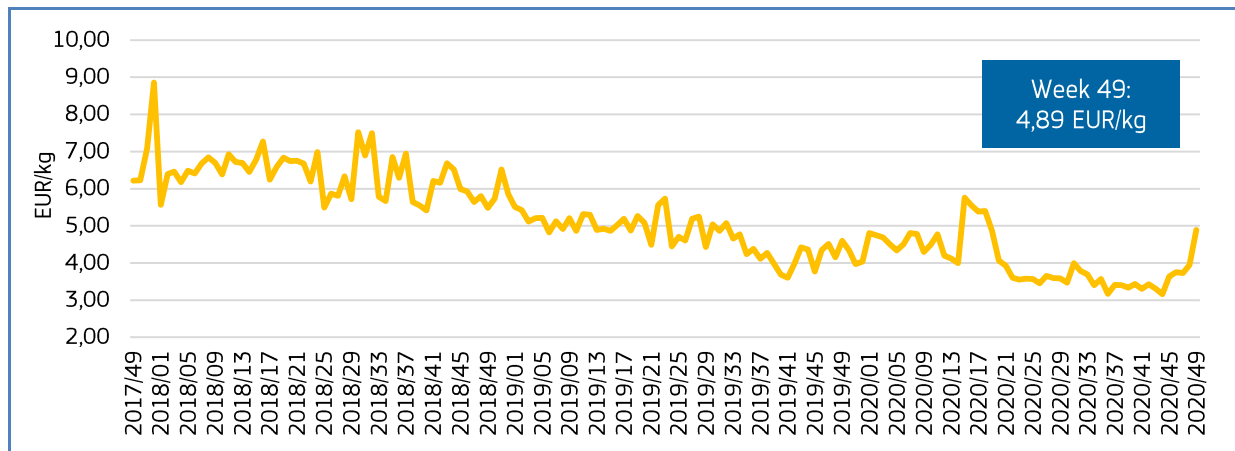
Source: European Commission (updated 16.12.2020).

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

Extra-EU Imports		Week 49/2020	Preceding 4-week average	Week 49/2019	Notes
Frozen cuttlefish from Morocco (<i>Sepia officinalis</i> , <i>Rossia macrosoma</i> , CN code 03074329)	Price (EUR/kg)	4,89	3,76 (+30%)	4,60 (+6%)	Downward trend from 2017 to 2020. Price spikes correlate with decrease in supply.
	Volume (tonnes)	133	483 (-72%)	106 (+26%)	Supply is consistent, volume mostly ranges from 100 to 300 tonnes. Upward trend from 2017 to 2020.
Frozen squid from Morocco (<i>Loligo vulgaris</i> , CN code 03074331)	Price (EUR/kg)	6,64	7,03 (-6%)	7,19 (-8%)	Downward trend from 2017 to 2020. Price spikes (over 13 EUR/kg) due to significant drop of supply.
	Volume (tonnes)	368	428 (-14%)	143 (+157%)	High fluctuations in supply, from 0,5 to 923 tonnes. Upward trend from 2017 to 2020.
Frozen other squid from India (<i>Loligo</i> spp., CN code 03074338)	Price (EUR/kg)	3,61	4,19 (-14%)	4,05 (-11%)	Upward trend from 2017 to 2020.
	Volume (tonnes)	642	646 (-1%)	866 (-26%)	High fluctuations in supply, from 134 to 1.131 tonnes. Downward trend from 2017 to 2020.

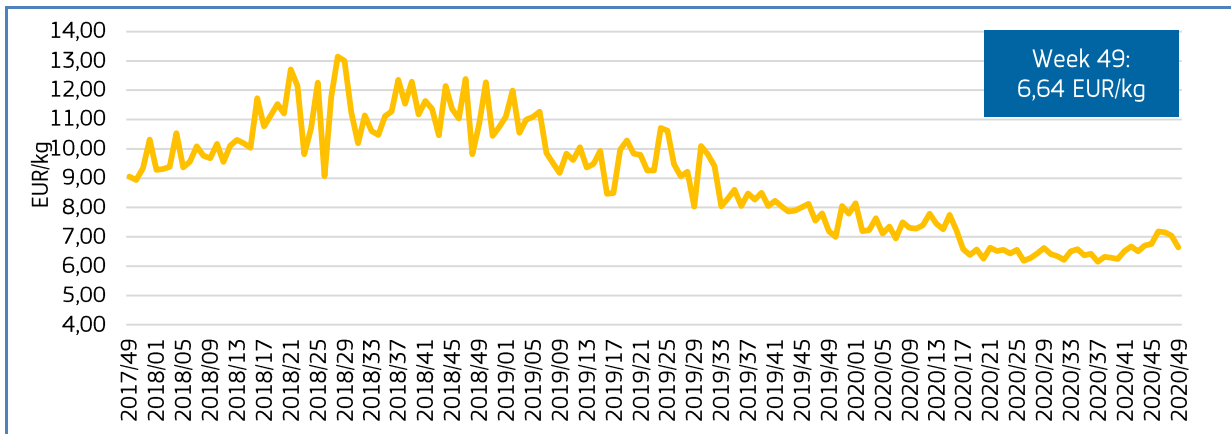
Source: European Commission (updated 16.12.2020).

Figure 33. **IMPORT PRICE OF FROZEN CUTTLEFISH FROM MOROCCO, 2017 – 2020**



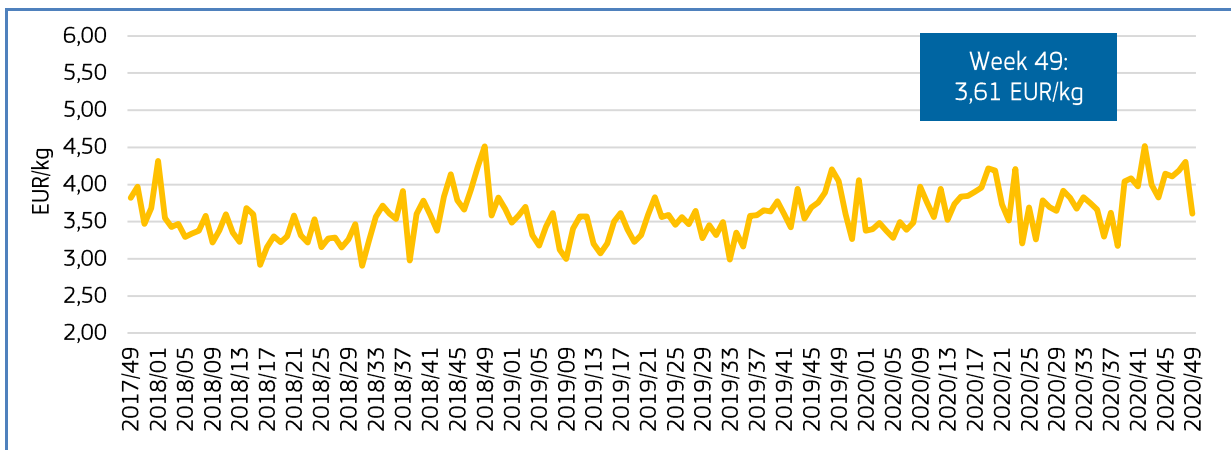
Source: European Commission (updated 16.12.2020).

Figure 34. **IMPORT PRICE OF FROZEN SQUID FROM MOROCCO, 2017 – 2020**



Source: European Commission (updated 16.12.2020).

Figure 35. **IMPORT PRICE OF FROZEN OTHER SQUID FROM INDIA, 2017 – 2020**



Source: European Commission (updated 16.12.2020).

Since week 1 of 2020, the price of frozen cuttlefish from Morocco fell, while volume exhibited an upward trend.

The price of frozen squid from Morocco dropped significantly in 2020, while volume went up. The price mostly ranged from 6,00 to 7,00 EUR/kg.

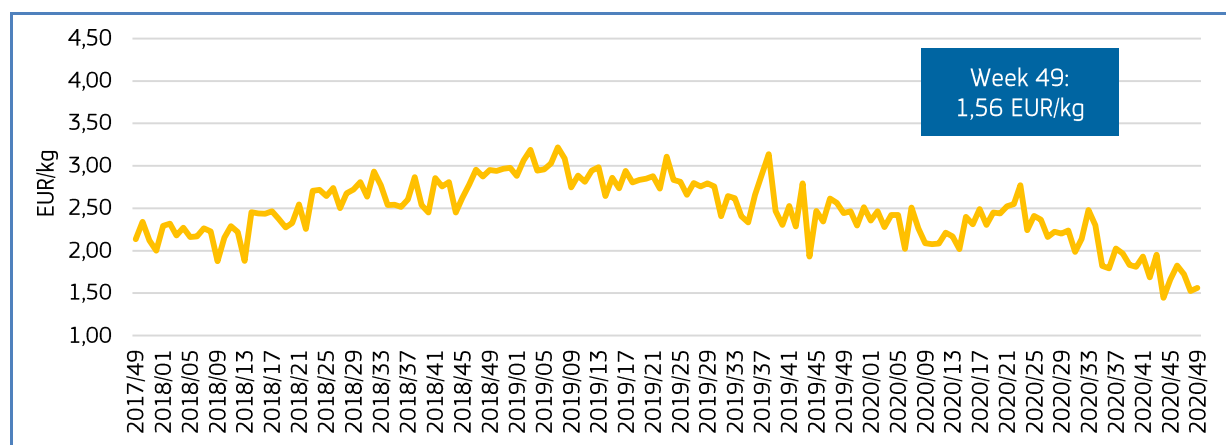
In 2020, the price of other squid from India fluctuated from 3,17 to 4,52 EUR/kg and exhibited an upward trend. At the same time, supply decreased.

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

Extra-EU Imports		Week 49/2020	Preceding 4-week average	Week 49/2019	Notes
Frozen fillets of catfish from Vietnam (<i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp., CN code 03046200)	Price (EUR/kg)	1,56	1,68 (-7%)	2,44 (-36%)	Downward trend from 2017 to 2020. Most price spikes do not correlate with drops in supply.
	Volume (tonnes)	772	908 (-15%)	1.214 (-36%)	High fluctuations in supply, from 437 to 2.106 tonnes. Downward trend from 2017 to 2020.
Frozen lobster, whole, from Canada (<i>Homarus</i> spp., CN code 03061210)	Price (EUR/kg)	11,84	11,21 (+6%)	15,22 (-22%)	Downward trend from 2017 to 2020. Prices mostly range from 12,00 to 14 EUR/kg. Price spikes do not correlate with drops in supply.
	Volume (tonnes)	47	89 (-47%)	76 (-38%)	High fluctuations in supply, from 0,1 to 235 tonnes. Upward trend from 2017 to 2020.
Fresh or chilled lesser or Greenland halibut from Norway (<i>Reinhardtius hippoglossoides</i> , CN code 03022110)	Price (EUR/kg)	3,94	3,85 (+3%)	5,33 (-26%)	Downward trend from 2017 to 2020. Prices range from 2,61 to 8,63 EUR/kg.
	Volume (tonnes)	9	8 (+21%)	2 (+481%)	Stable supply from 2017 to 2020, notwithstanding high fluctuations, from 0,002 to 173 tonnes.

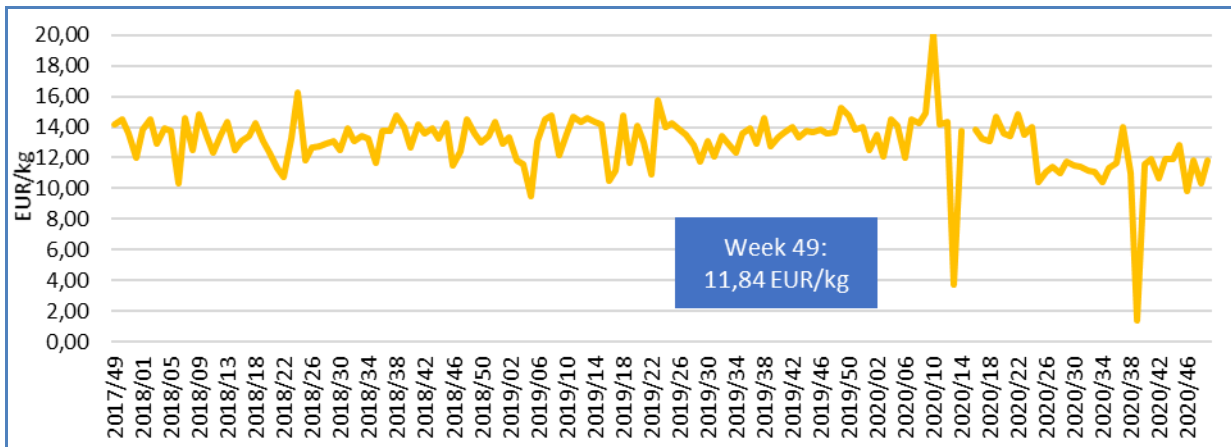
Source: European Commission (updated 16.12.2020).

Figure 36. **IMPORT PRICE OF FROZEN FILLETS OF CATFISH FROM VIETNAM, 2017 – 2020**



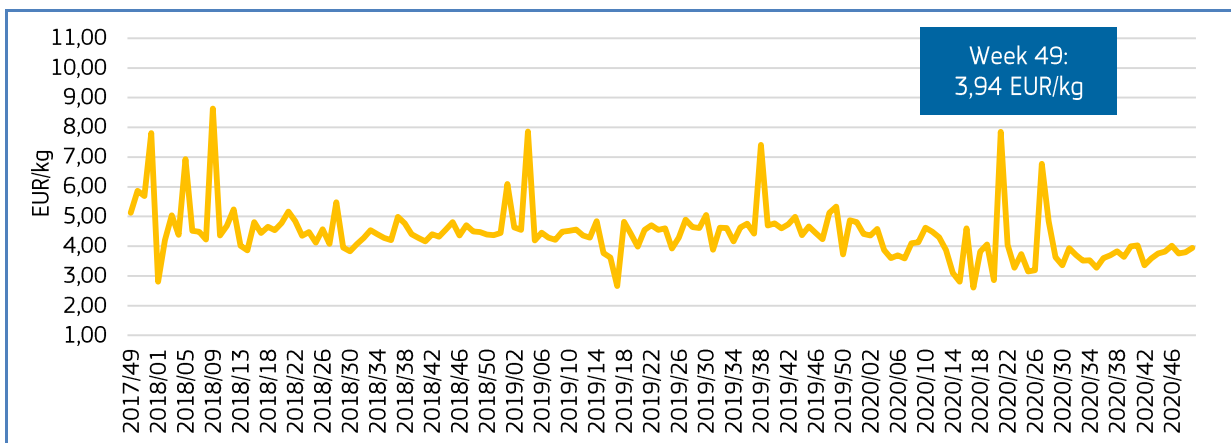
Source: European Commission (updated 16.12.2020).

Figure 37. **IMPORT PRICE OF FROZEN LOBSTER, WHOLE, FROM CANADA, 2017 – 2020**



Source: European Commission (updated 16.12.2020).

Figure 38. **IMPORT PRICE OF FRESH OR CHILLED LESSER OR GREENLAND HALIBUT FROM NORWAY, 2017 – 2020**



Source: European Commission (updated 16.12.2020).

Since the beginning of 2020, both the price and volume of frozen fillets of catfish from Vietnam have exhibited a downward trend.

In 2020, the price of whole, frozen lobster from Canada fluctuated from 1,39 to 20,10 EUR/kg and exhibited an overall downward trend. At the same time, supply increased.

The price of fresh or chilled, lesser or Greenland halibut from Norway exhibited a slight downward trend in 2020. At the same time, supply remained stable.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In October 2020 relative to October 2019, household consumption of fresh fisheries and aquaculture products increased in both volume and value in all Member States analysed, except Italy. In the latter, both volume and value experienced a decline (-9% and 10%, respectively).

The drop seen in Italy was mainly due to reduced consumption of squid and octopus (-49% and -35%, respectively).

The consumption increase registered in Denmark was due mainly to an eight-fold rise in consumption of mussel (*Mytilus* spp.). An increase in flounder consumption (27%) also contributed to the overall rise in consumption. In Spain, seabass and seabream were the primary drivers of increased consumption (+54% and 43%, respectively).

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

Country	Per capita consumption 2018* (live weight equivalent, LWE) kg/capita/year	October 2018		October 2019		September 2020		October 2020		Change from October 2019 to October 2020	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	39,83	894	14,63	926	15,48	1.218	18,84	1.066	18,16	15%	17%
France	33,52	19.265	202,62	18.165	205,07	18.012	202,41	19.478	223,35	7%	9%
Germany	14,50	5117	66,20	5.217	72,18	5.120	75,10	6.205	82,29	19%	14%
Hungary	6,12	318	1,73	377	1,95	332	2,04	392	2,02	4%	4%
Ireland	23,13	933	13,54	914	13,19	1.049	15,28	971	14,38	6%	9%
Italy	31,02	25.357	255,73	26.238	280,64	30.223	310,76	23.923	251,66	9%	10%
Netherlands	20,90	2.654	36,17	2.653	37,23	4.242	60,76	2.869	41,81	8%	12%
Poland	13,02	4.129	24,11	3.609	23,23	3.118	21,36	3.883	25,45	8%	10%
Portugal	60,92	5.231	30,70	5.806	36,65	6.744	42,69	6.299	42,17	8%	15%
Spain	46,01	50.896	384,22	51.663	402,79	53.285	417,49	59.006	472,61	14%	17%
Sweden	26,61	845	10,47	969	12,17	1.165	13,30	1.529	17,45	58%	43%

Source: EUMOFA, based on Europanel (updated 11.12.2020).

*Data on per capita consumption of all fish and seafood products for all EU Member States can be found at: https://www.eumofa.eu/documents/20178/415635/EN_The+EU+fish+market_2020.pdf

Over the past three years, the average household consumption of fresh fisheries and aquaculture products in October has been above the annual average in both volume and value terms only in Portugal, Spain, and Sweden. In Germany, the average volume for October was also above the yearly average household consumption, although average value was lower. The opposite trend was observed in France. In the rest of the Member States analysed, October household consumption in both volume and value was below the annual average.

The most recent weekly consumption data (up to week 3 of 2021) are available on the EUMOFA website and can be accessed [here](#).

3.2. Fresh anchovy

Habitat: a small pelagic species, inhabiting coastal marine waters in large schools¹⁸.

Catch area: Northeast Atlantic from the south of Norway through the English Channel, around the UK and Ireland, the Bay of Biscay, and the Mediterranean and Black seas¹⁹.

Catching countries in the EU: Italy, Spain, France.

Production method: Caught.

Main consumers in the EU: Italy, Spain.

Presentation: Whole.

Preservation: Fresh, frozen, smoked, salted, marinated, canned.



3.2.1. Overview of household consumption in Italy

Italy is among the EU Member States with high per capita apparent consumption²⁰ of fisheries and aquaculture products. In 2018, the country's per capita apparent consumption increased slightly by 1% and reached 31,02 kg. This was 27% higher than the EU average (24,36 kg). However, Italian apparent consumption was 64% less than that of Malta²¹, the Member State with the highest per capita apparent consumption (85,95 kg) in 2018.

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

In 2020 (January – October 2020), total household consumption of anchovy in Italy experienced a seasonal increase in volume reaching 13.497 tonnes, while prices decreased and averaged at 6,61 EUR/kg for the period. However, since 2017, Italian consumers spent an average of EUR 6,31 for a kilogram of fresh anchovy. The average volume purchased and consumed by households was 1.575 tonnes per month.

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

First Sales: France 8/2017, Greece 8/2017, 7/2016, 2/2015, January 2013; Italy 5/2020, 8/2017; Portugal 5/2020; Spain 5/2020.

Consumption: Greece 5/2016, 8/2015, 6/2014; Italy 10/2018, 5/2016, 8/2015, 6/2014; Spain 5/2016, 8/2015, 6/2014.

Extra-EU Imports: Morocco 7/2020, 10/2018, 4/2018.

Topic of the month: Anchovy in the EU 4/2017.

¹⁸ <http://www.fao.org/fishery/species/2106/en>

¹⁹ *Ibidem*.

²⁰ "Apparent consumption" is calculated by using the supply balance sheet that provides an estimate of the supply of fisheries and aquaculture products available for human consumption at EU level. The calculation of the supply balance sheet is based on the equation: $Apparent\ consumption = ((total\ catches - industrial\ catches) + aquaculture + imports) - exports$. Catches targeted for fishmeal (industrial catches) are excluded. Non-food use products are also excluded from imports and exports. It is worth underlining that the methodologies for estimating apparent consumption at EU and Member State levels are different, the first based on data and estimates as described in the Methodological background, the latter also requiring the adjustment of abnormal trends due to the higher impact of stock changes.

²¹ The high per capita apparent consumption in Malta could be due to higher consumption of fisheries and aquaculture products during the tourist season.

3.2.2. Household consumption trends in Italy

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

Yearly average price: 5,96 EUR/kg (2017), 6,25 EUR/kg (2018), 6,46 EUR/kg (2019).

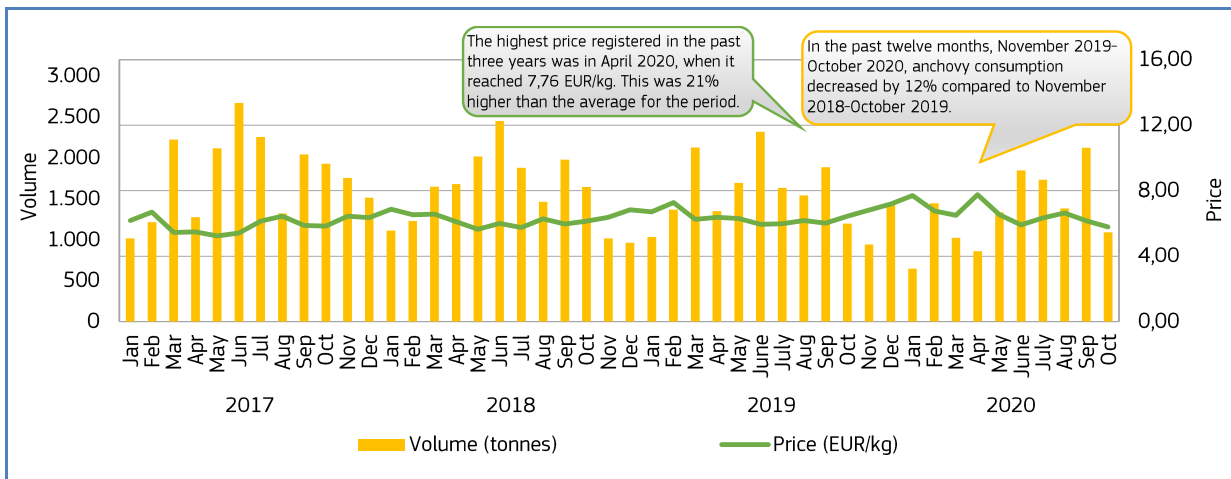
Yearly consumption: 21.344 tonnes (2017), 19.084 tonnes (2018), 18.542 tonnes (2019).

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

Average price: 6,61 EUR/kg.

Consumption: 13.497 tonnes.

Figure 39. **RETAIL PRICE AND VOLUME OF FRESH ANCHOVY PURCHASED BY HOUSEHOLDS IN ITALY, JANUARY 2017 – OCTOBER 2020**



Source: EUMOFA, based on Europanel (updated 11.12.2020).

4. Case study – Coldwater shrimp in the EU (*Pandalus* genus)

Coldwater shrimp belong to the *Pandalus* genus of the family Pandalidae which includes 46 species^{22,23}. According to EUMOFA, the main commercial species “coldwater shrimp” covers the species *Pandalus borealis*, *Pandalus montagui* and *Pandalus* spp. (multiple species). Coldwater shrimp are medium-sized crustaceans which live on or near the seabed in the North Atlantic and in the North Pacific. In 2018, global catch of coldwater shrimp amounted to 284.000 tonnes, mostly caught by Greenland, Canada, Norway, and Russia. Catches of coldwater shrimp by EU Member States reached 3.336 tonnes for a total value of EUR 27 million in 2019. The majority of EU first sales occur in Denmark and Sweden.

4.1. Biology, resource, and exploitation



Pandalus borealis (pictured) is known by many names, such as pink shrimp, deep-water/sea prawn, Maine shrimp, coldwater prawn/shrimp, northern prawn/shrimp or salad shrimp^{24,25,26}. *Pandalus borealis* live on clay and mud in marine waters at depths of 20 to 1.330 meters²⁷. They prefer colder temperatures and can be found in the North Atlantic and in the North Pacific. Coldwater prawns begin life as males but transition to females at 2-6 years, depending on sea temperature²⁸. Males reach 120 millimetres in length, while females can reach 165 millimetres. *Pandalus borealis* accounts for the majority of coldwater shrimp catches,

covering 61% of catch worldwide in 2018²⁹.

Pandalus montagui is variously known as pink shrimp/prawn, Aesop shrimp/prawn, prawn, sprawn, shank, Fleetwood prawn, and striped pink prawn/shrimp³⁰. *Pandalus montagui* lives in marine water at depths of 20 to 100 meters, although it can also be found as deep as 700 meters and as shallow as 4 meters. The species can be found in the Northern Atlantic Ocean, on the ocean floor in habitats of sand, gravel, and rock³¹.

Shrimp grow by moulting, a process by which they crawl out of their exoskeleton, allowing the body to take up water and increase in size before a new shell hardens. The water absorbed will later be replaced by tissue, constituting the actual growth. Female shrimp spawn between June and November, depending on temperature and species, carrying their eggs on their underside until they hatch in the spring (between March and June, depending on temperature and species)³².

Resource, exploitation, and management

Coldwater shrimp are fished in the Northern Atlantic. Greenland concentrates fishing of the stock on its west coast, south of 75 degrees north and to the east in the Denmark Strait. Norway and Russia fish in the Barents Sea and on the Svalbard Shelf, in their respective exclusive economic zones (EEZ), while non-Norwegian and non-Russian vessels are restricted to fishing within the Svalbard fishery protection zone (FPZ)³³. There is also some fishing in Skagerrak and the North Sea. In recent years, the stock's distribution has moved further north and east³⁴.

²² <http://www.marinespecies.org/aphia.php?p=taxdetails&id=107044>

²³ Another commercially important coldwater shrimp is the brown shrimp (*Crangon crangon*) but this is not part of this case study.

²⁴ FAO Fisheries & Aquaculture – Species Fact Sheets – *Pandalus montagui* (Leach, 1814)

²⁵ Good Fish Guide | Marine Conservation Society (mcsuk.org)

²⁶ Atlantic Northern Shrimp | NOAA Fisheries

²⁷ *Ibidem*.

²⁸ <https://www.hi.no/en/hi/temasider/species/deep-water-shrimp>

²⁹ FAO.

³⁰ <http://www.fao.org/fishery/species/3426/en>

³¹ *Ibidem*.

³² <https://www.hi.no/en/hi/temasider/species/deep-water-shrimp>

³³ *Ibidem*.

³⁴ Good Fish Guide | Marine Conservation Society (mcsuk.org)

Coldwater shrimp are caught by otter trawls equipped with sorting grids and appropriate mesh size to avoid bycatch. Shrimp fisheries can be divided into inshore fisheries and offshore fisheries³⁵. Inshore fishing takes place close to the shore and involves small vessels (trawlers). The catch is stored on ice until it is landed at ports with processing factories, where it is processed as fresh chilled products³⁶. Prior to processing, shrimp are sorted based on their size and quality. Offshore shrimp fishing is conducted by larger vessels and initially processed (sorting, cooking and quick-freeze) on board before being landed to be sent to customers or for further processing. In Greenland, which is the world's leading catch country of coldwater shrimp, it is mandatory to land a minimum of 25% of total catch for on-land processing. The ratio between catches by the inshore and offshore fleet is quite evenly distributed, with offshore fisheries catching around 6% more in 2019³⁷.

In the Barents Sea the stock of coldwater shrimp has been certified by private sustainability scheme³⁸. For the fishing season 2020/2021, the Canadian government reduced the TAC by 25% for their main coldwater shrimp fishing zones due to stock sustainability concerns³⁹. In the United States, commercial fishing for coldwater shrimp in American waters has been prohibited since 2014, due to its extremely depleted state⁴⁰.

4.2. Production

Catches

Global catches of coldwater shrimp amounted to 284.000 tonnes in 2018. Of these catches, Greenland covered 32%, Canada 29%, Norway 10%, and Russia 10%. Since 2009, there has been a 22% decrease in the volume of coldwater shrimp caught globally. This can be explained through a growing global stock of cod (predators of coldwater shrimp) and rising sea temperatures, pushing habitats further north⁴¹. While most countries have experienced a decrease in shrimp catches, Russia and the USA have increased their catches by 210% and 34%, respectively, from 2009 to 2018. Since 2006, the yearly catch has been below the catch advice from ICES⁴². Among all EU Member States, Estonia caught the highest volumes, covering 3% of global volume in 2018 which was landed in Norway (60%) and Iceland (40%)⁴³.

Table 24. **TOTAL WORLD CATCHES OF COLDWATER SHRIMP⁴⁴ (volume in 1.000 tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Greenland	135	124	117	110	92	86	75	86	94	91
Canada	138	164	151	149	148	130	135	105	81	83
Norway	27	22	24	19	14	16	23	19	13	28
Russia	9	10	9	9	11	12	14	17	22	28
USA	17	27	35	32	32	42	47	24	16	23
EU28	22	23	21	16	14	13	15	16	18	20
Others	14	14	14	16	15	12	11	11	9	10
Total*	362	384	373	351	327	311	320	278	253	284

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

³⁵ coldwatershrimp.pdf (uaf.edu)

³⁶ coldwatershrimp.pdf (uaf.edu)

³⁷ <https://bank.stat.gl/pxweb/en/Greenland>

³⁸ Barents Sea prawn fishery MSC certified (seafoodsource.com)

³⁹ <https://www.undercurrentnews.com/2020/04/10/canada-cuts-tacs-for-main-coldwater-shrimp-areas-by-25/>

⁴⁰ Atlantic Northern Shrimp | NOAA Fisheries

⁴¹ Coldwater Shrimp: Catch has been declining for more than a decade - Eurofish Magazine

⁴² Good Fish Guide | Marine Conservation Society (mcsuk.org). The exception was in 2019.

⁴³ First Estonia Prawn Fishery Enters MSC Assessment | The Fish Site

⁴⁴ Catches reported under the genus *Pandalus* (2018): *borealis* (61%), spp. (29%), *jordani* (8%), *goniurus* (1%), *hypsinotus* (1%), *montagui* (0%), *kessleri* (0%), *platyceros* (0%).

4.3. Extra-EU Imports

In 2019 the total EU import of coldwater shrimp amounted to 50.000 tonnes at a value of EUR 209 million. Denmark is by far the main importing Member State, covering 92% of total volume and 87% of value in 2019. The majority of extra-EU imports came from Greenland, which covered 79% of volume and 77% of value, while Canada was the second largest supplier with 14% of import volume and 11% of import value. The predominant preservation state of imports was frozen (98% of volume and 96% of value).

Table 25. **EXTRA-EU IMPORTS OF COLDWATER SHRIMP BY MEMBER STATE (volume in 1.000 tonnes, value in EUR million)**

Country	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	42	143	44	159	45	160	48	156	46	182
Bulgaria	1	4	1	5	1	4	2	6	2	6
Netherlands	0	1	0	2	0	2	0	1	1	8
Sweden	2	14	2	12	1	11	1	9	1	9
Other	2	7	1	5	1	5	1	4	1	4
Total*	46	169	48	183	49	182	52	176	50	209

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

Source: EUMOFA elaboration of EUROSTAT – COMEXT data.

Table 26. **EXTRA-EU IMPORTS OF COLDWATER SHRIMP BY MAIN SUPPLIERS (volume in 1.000 tonnes, value in EUR million)**

Country	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Greenland	31	98	36	125	38	134	40	129	40	160
Canada	11	44	7	28	7	26	9	30	7	23
Faroe Islands	1	5	2	10	2	8	1	5	1	5
Norway	2	15	2	14	2	11	1	9	1	9
Other	1	8	1	6	0	2	0	3	1	12
Total*	46	169	48	183	49	182	52	176	50	209

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

Source: EUMOFA elaboration of EUROSTAT – COMEXT data.

4.4. Extra-EU Exports

In 2019 the EU exported a total of 49.000 tonnes of coldwater shrimp, with a value of EUR 240 million. Denmark is the Member State which exported the most: 78% of total volume and 74% of total value. Estonia was the second largest exporter in terms of volume (13%) but third in terms of value (8%); the reverse was true for the Netherlands which covered 18% of value and 9% of volume.

Most exports of coldwater shrimp from the EU in 2019 were shipped to China (45% of volume and 52% of value), followed by Albania, Russia, and Iceland, which together received roughly the same amount each (11%, 10% and 10% of volume, respectively, and 9%, 9% and 5% of value, respectively). All EU coldwater shrimp is exported as frozen.

Table 27. **EXTRA-EU EXPORTS BY MAIN SUPPLIER (volume in 1.000 tonnes, value in EUR million)**

Country	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	28	140	31	158	34	172	36	175	38	177
Estonia	3	11	3	10	3	11	3	11	6	19
Netherlands	0	1	0	2	2	13	2	7	4	42
Germany	0	0	0	0	0	0	0	0	0	0
Other	0	4	1	4	0	3	1	4	0	2
Total	31	156	35	174	39	199	41	198	49	240

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

Source: EUMOFA elaboration of EUROSTAT – COMEXT data.

Table 28. **EXTRA-EU EXPORTS BY MAIN DESTINATION (volume in 1.000 tonnes, value in EUR million)**

Country	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
China	8	45	10	57	15	86	16	86	22	125
Albania	0	0	1	3	3	13	4	16	6	21
Russia	7	31	7	34	9	43	8	32	5	21
Iceland	3	11	3	7	2	5	3	7	5	13
Other	13	69	14	74	9	52	11	56	12	61
Total*	31	156	35	174	39	199	41	198	49	240

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

Source: EUMOFA elaboration of EUROSTAT – COMEXT data.

4.5. First sales in the EU

In 2020, first sales of coldwater shrimp in the EU reached a total of 3.883 tonnes at a value of EUR 28 million by November. Denmark and Sweden accounted for the majority of sales, covering 57% and 42% of total volume, respectively. Sweden sold coldwater shrimp at the highest value (65% of total value), followed by Denmark (34%). The high first-sales value in Sweden could be explained by more shrimp being sold with shell-on for direct consumption at a higher price, while shrimp sold in Denmark is destined for peeling and further processing. The first-sales monthly data in the majority of EU countries do not show any clear common seasonality for coldwater shrimp fisheries.

In 2020, the main place of sale for coldwater shrimp in Denmark was the port of Skagen, accounting for 49% of total first-sales volume. Other important locations were Hirtshals (40%) and Hanstholm (11%). In Sweden, the main place of sale was Göteborg, accounting for 35% of total first-sales volume, followed by Smögen (17%). In Spain, the main places of sale for coldwater shrimp were Huelva (100% of total volume).

Table 29. **EU FIRST SALES OF COLDWATER SHRIMP (volume in tonnes, value in 1.000 euro)**

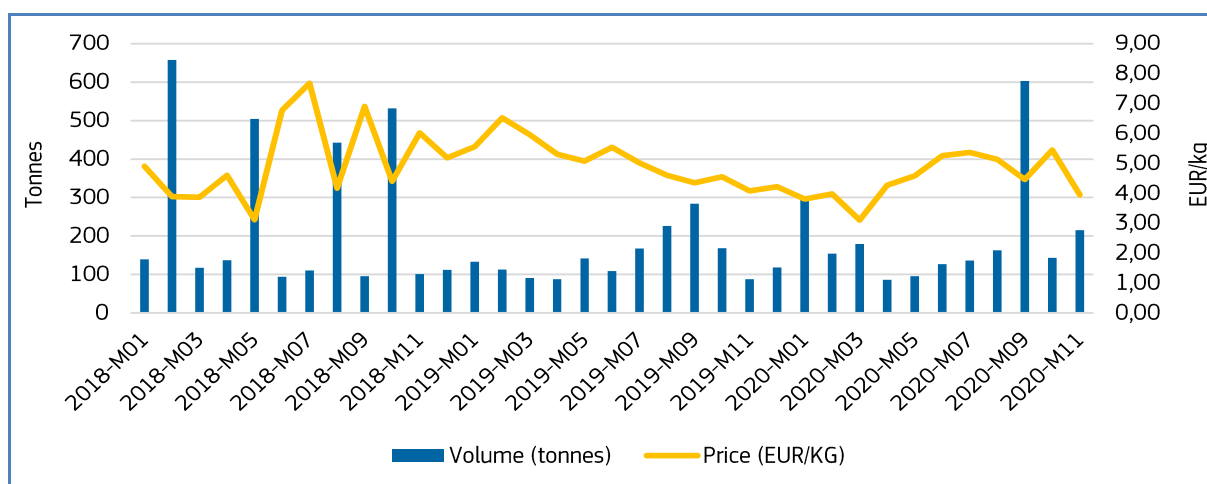
	2016		2017		2018		2019		2020*	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	1.732	8.233	2.482	11.138	3.041	13.400	1.725	8.530	2.195	9.640
Sweden	2.448	21.232	1.917	19.010	1.681	17.235	1.445	17.830	1.638	18.390
Spain	325	3.133	209	1.876	179	855	166	708	49	236
United Kingdom	0	2	0	1	4	7	0	4	0	1
Other	22	274	4	27	5	19	n/a	n/a	n/a	n/a
Total**	4.527	32.874	4.612	32.052	4.910	31.516	3.336	27.072	3.883	28.266

*Data for December 2020 is currently not available.

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

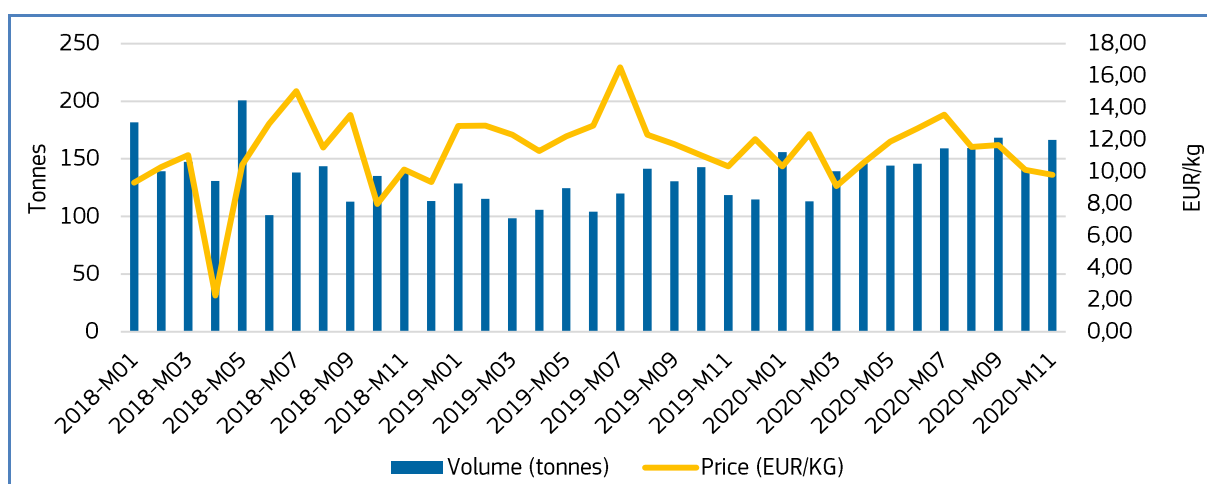
Source: EUMOFA.

Figure 40. **FIRST SALES: COLDWATER SHRIMP IN DENMARK**



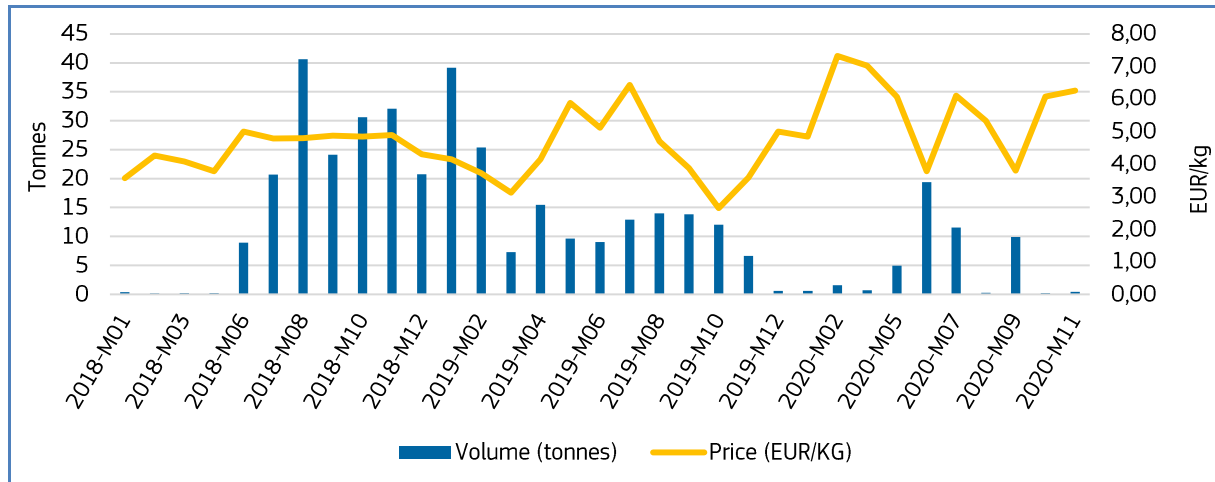
Source: EUMOFA.

Figure 41. **FIRST SALES: COLDWATER SHRIMP IN SWEDEN**



Source: EUMOFA.

Figure 42. **FIRST SALES: COLDWATER SHRIMP IN SPAIN**



Source: EUMOFA.

4.6. Consumption

Coldwater shrimp is mainly sold to European and Asian markets. Consumer preference for the final product differs between markets, with UK consumers preferring cooked and peeled shrimp, while Sweden and Russia prefer shell-on shrimp. Throughout Europe, coldwater shrimp in brine is popular as a salad ingredient⁴⁵. According to EUROPANEL data, household consumption of coldwater shrimp in multiple Member States was the highest for consumers over fifty years of age⁴⁶. The lower consumption among younger consumers could be explained by the availability of substitute products and changing consumer preferences⁴⁷. In contrast, consumption of coldwater shrimp is increasing in developing countries, with import volumes to China, amongst other countries, expected to increase⁴⁸.

⁴⁵ ShrimpTails September 2019 | page 61 (seafood-tip.com)

⁴⁶ Cold water prawn struggles to compete against its warm water counterpart - Eurofish Magazine

⁴⁷ *Ibidem*.

⁴⁸ China, a huge and growing market for prawns - Eurofish Magazine

5. Case study – Fisheries and aquaculture in Mexico

Mexico is located in the southern part of North America. It is bordered to the north by the USA, to the southeast by Belize and Guatemala, to the west by the Pacific Ocean, and to the east by the Gulf of Mexico and the Caribbean Sea. Mexico has an extensive 11.593 km coastline, of which 8.475 km corresponds to the Pacific coast, and 3.118 km to the Gulf of Mexico and the Caribbean Sea, including offshore islands. Its continental platform is approximately 394.603 km², the largest in the Gulf of Mexico. Furthermore, Mexico also possesses 12.500 km² of coastal lagoons and estuaries, and has 6.500 km² of inland waters, such as lakes, lagoons, dams and rivers⁴⁹.

Mexico's fishing and aquaculture sectors have an important contribution to the country's economy (although accounting for only 0,1% of the country's GDP in 2014), providing employment for approximately 227.182 people (2017), and representing a positive trade balance (in 2018, exports and imports of fishery and aquaculture products were EUR 1,12 billion and EUR 708 million, respectively). Moreover, the country is home to important seafood processing facilities that produce predominantly frozen fish, cephalopods, crustaceans, canned tuna, and small pelagic species. For many coastal and/or rural populations, fishing and aquaculture activities provide key livelihoods and a critical source of animal protein. It is estimated that the annual per capita consumption of animal protein (about 14,9 kg in 2016) continues to grow⁵⁰.

5.1. Fishery production

The main fisheries operating in offshore waters are those for sardines, tuna, squid, and shrimp, while tilapia is mainly fished in continental waters. Artisanal fishing is characterised by small, under 12 m multi-species vessels (about 75.996 vessels in 2016), while the industrial sector (about 2.000 vessels) is dominated by trawlers (64%), followed by long-liners (18%)⁵¹.

According to the Food and Agriculture Organisation (FAO), total catches in Mexico reached approximately 1,7 million tonnes in 2018, mostly from marine fisheries. Herrings, sardines, and anchovies accounted for 30% of the total catches (mostly Pacific thread herring and California pilchard). Freshwater fishes accounted for 13% of the total (mostly tilapia species and, to a lesser extent, common carp), whereas crustaceans (mostly crabs and shrimps), tunas and tuna-like species (mostly yellowfin tuna), and miscellaneous coastal fishes each accounted for 10% of total catches.

The volume of Mexican catches experienced a slight increasing trend from 2009 to 2018 (+5%), mostly due to freshwater fishes (+117%), crustaceans (+88%), miscellaneous coastal fishes (+109%), and miscellaneous demersal fishes (+411%). Catches of herring, sardine, and anchovy species have strongly decreased over the last decade (-42%); the most significant drop was experienced by catches of California pilchard (-83%).

⁴⁹ https://www.mapa.gob.es/es/pesca/temas/mercados-economia-pesquera/espana-mexicodic2014_tcm30-290627.pdf

⁵⁰ <http://www.fao.org/fishery/facp/MEX/en>

⁵¹ *Ibidem*.

Table 30. **MEXICAN CATCHES BY MAIN SPECIES GROUP (volume in tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Herrings, sardines, anchovies	880.214	767.244	793.319	798.190	837.226	594.719	470.590	452.371	522.355	506.655
Freshwater fishes	100.711	107.615	108.712	104.575	112.865	119.590	147.500	194.908	163.725	218.298
Crustaceans	93.842	97.556	102.416	88.977	100.763	114.306	144.470	157.162	160.362	176.022
Tunas, bonitos, billfishes	158.562	151.953	145.355	147.280	160.979	170.267	170.823	151.760	189.614	169.971
Miscellaneous coastal fishes	78.263	76.982	63.328	73.294	89.469	107.143	127.367	145.831	141.375	163.331
Molluscs	157.175	155.350	186.013	134.595	130.573	155.167	138.263	128.745	153.475	144.196
Miscellaneous pelagic fishes	26.712	37.252	25.602	37.694	66.273	86.141	96.488	121.971	107.102	136.607
Others	123.914	134.330	146.916	196.595	128.270	182.035	184.062	171.719	199.373	184.210
Total	1.619.393	1.528.282	1.571.661	1.581.200	1.626.418	1.529.368	1.479.563	1.524.467	1.637.381	1.699.290

Source: FAO.

5.2. Aquaculture production

According to the FAO, total Mexican aquaculture production reached 247.222 tonnes in 2018, dominated by the shrimp farming sector. Whiteleg shrimp accounted for 64% of total aquaculture production, followed by tilapia, the second most important aquaculture species (21%). Rainbow trout and Pacific bluefin tuna (4% each), Pacific cupped oyster and common carp (2% each), and Cortez oyster (1%) also contributed to aquaculture production.

Over the past decade (2009-2018), the volume of Mexican aquaculture production has risen by 58%, affecting most of the main species except common carp, for which production decreased by 30%.

Table 31. **MEXICAN AQUACULTURE PRODUCTION BY MAIN SPECIES (volume in tonnes)**

Species	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Whiteleg shrimp	125.778	104.612	109.816	100.320	60.292	86.973	130.361	127.814	150.030	157.934
Tilapias nei	11.174	8.243	10.082	23.749	29.269	54.536	48.904	58.191	55.358	52.748
Rainbow trout	4.875	4.932	7.709	6.892	6.208	15.400	8.388	8.655	9.499	10.440
Pacific bluefin tuna	2.987	2.008	3.557	1.784	6.228	8.286	7.854	8.756	5.722	9.352
Pacific cupped oyster	1.558	2.858	1.963	2.479	1.975	3.525	4.276	5.932	7.534	4.979
Common carp	6.067	448	627	1.291	182	8.001	3.090	4.952	3.092	4.272
Cortez oyster	1.200	1.036	608	2.590	2.421	9.386	2.713	1.728	7.358	3.361
Catfishes nei	-	-	-	-	1.400	3.860	1.883	1.704	1.527	1.213
Others	3.318	2.101	2.766	4.642	3.525	4.264	4.153	3.595	3.187	2.923
Total	156.957	126.238	137.128	143.747	111.500	194.230	211.622	221.327	243.307	247.222

Source: FAO.

5.3. Processing

In Mexico, the production of processed fish and seafood amounted to 595.889 tonnes (relatively stable over the past decade). Frozen products and canned products were the main processed products, accounting for 69% and 23% of the total volume in 2019, respectively. Frozen products were dominated by shrimp (50% in volume terms), followed by finfish and octopus (11% each), and sharks (10%). Canned products were dominated by tunas (62% in volume terms) and small pelagics (37%). The Pacific coast accounted for 81% of the production of the processing industry⁵².

Table 32. **MEXICAN SEAFOOD PROCESSING PRODUCTION BY MAIN AREA (volume in tonnes)**

Area	Freezing	Canning	Reduction	Other processing	Total
Pacific coast	302.799	131.268	43.937	3.677	481.681
Atlantic coast	105.510	3.701	323	24	109.558
Inland	4.649	n/a	n/a	1	4.650
Total	412.957	134.970	44.260	3.702	595.889

Source: CONASPECA, 2018

5.4. Import-Export

Thanks to high levels of fisheries production and a growing aquaculture sector, the Mexican trade surplus for fishery and aquaculture products is high, reaching EUR 412 million in 2018. It has followed an increasing trend since 2014 (+138%).

Table 33. **MEXICAN TRADE BALANCE FOR FISH AND SEAFOOD (value in EUR 1.000)**

	2014	2015	2016	2017	2018
Imports	715.478	720.741	752.241	826.096	708.478
Exports	888.619	946.377	929.935	1.173.971	1.120.252
Balance	173.142	225.635	177.694	347.876	411.775

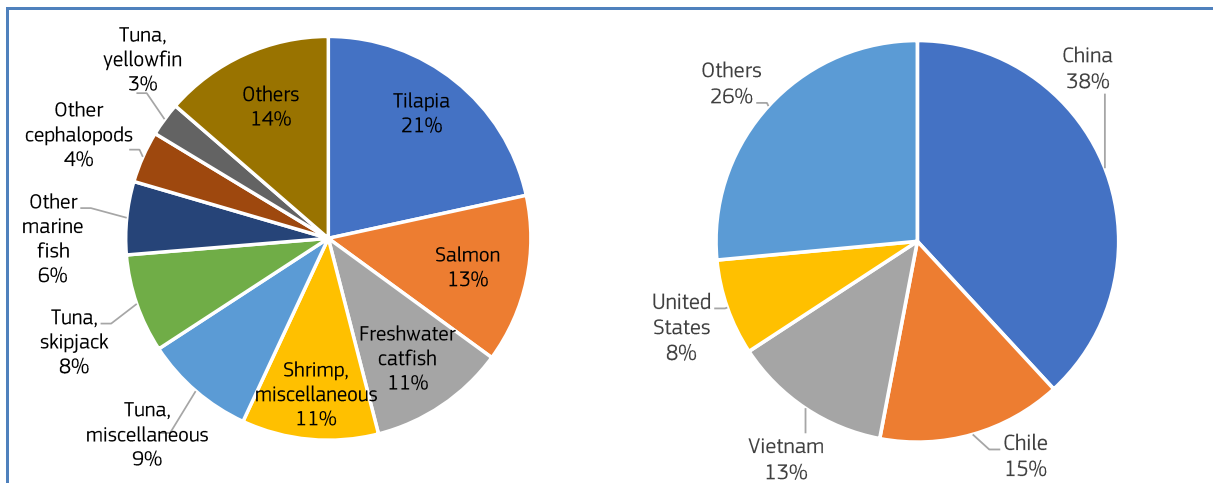
Source: EUMOFA elaboration of data from Global Trade Atlas -IHS Markit.

In 2018, Mexican imports of fishery and aquaculture products amounted to 265.756 tonnes for a value of almost EUR 708 million. In value terms, frozen products accounted for 62% of total imports, followed by prepared/preserved products (22%), and products under unspecified preservation (9%). The main commercial species imported were tilapia (22% of total value), salmon (13%), freshwater catfish, and miscellaneous shrimps (11% each). The main countries of origin in value terms were China (38%, mostly tilapia), Chile (15%, mostly salmon), Vietnam (13%, dominated by freshwater catfish), and the USA (8%, dominated by other marine fish⁵³).

⁵² https://www.conapesca.gob.mx/work/sites/cona/dgppe/2018/ANUARIO_2018.pdf

⁵³ "Other marine fish" is an EUMOFA aggregation of several species of lesser commercial importance at EU level.

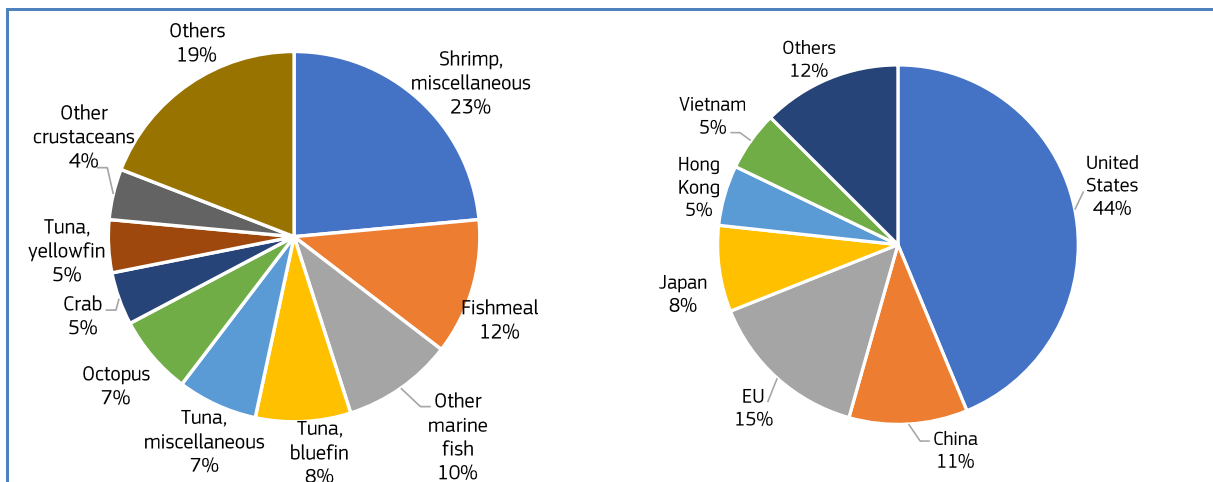
Figure 43. **MAIN COMMERCIAL SPECIES IMPORTED IN MEXICO (LEFT) AND MAIN ORIGINS OF MEXICAN IMPORTS (RIGHT) IN 2019 IN VALUE TERMS**



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

The same year, Mexican exports of fishery and aquaculture products reached 304.559 tonnes for a value of EUR 1,12 billion. In value terms, exports were dominated by frozen products (38% of total exports), followed by live/fresh products (27%), and products under unspecified preservation (25%). The main commercial species exported were miscellaneous shrimps (24% of total export value), followed by fishmeal (12%), other marine fish (10%), bluefin tuna (8%), miscellaneous tuna and octopus (7% each), and crab and yellowfin tuna (5% each). The top destination in value terms by a considerable margin was the USA (44%, mostly shrimps), followed by the EU (15%, dominated by tuna), China (11%, mostly fishmeal), and Japan (10%, mostly bluefin tuna). Other important destinations were Hong Kong and Vietnam (5% each).

Figure 44. **MAIN COMMERCIAL SPECIES EXPORTED BY MEXICO (LEFT) AND MAIN DESTINATIONS OF MEXICAN EXPORTS (RIGHT) IN 2019 IN VALUE TERMS**



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

5.5. Trade flows with the EU

Mexico is not among the major EU partners for fishery and aquaculture products. The EU trade deficit with Mexico in value terms has been increasing over recent years, but experienced a decrease from 2018 to 2019, due to an exceptional year in 2018 (EU import value from Mexico almost doubled compared to 2017). In 2019, the trade deficit reached a value of almost EUR 92 million.

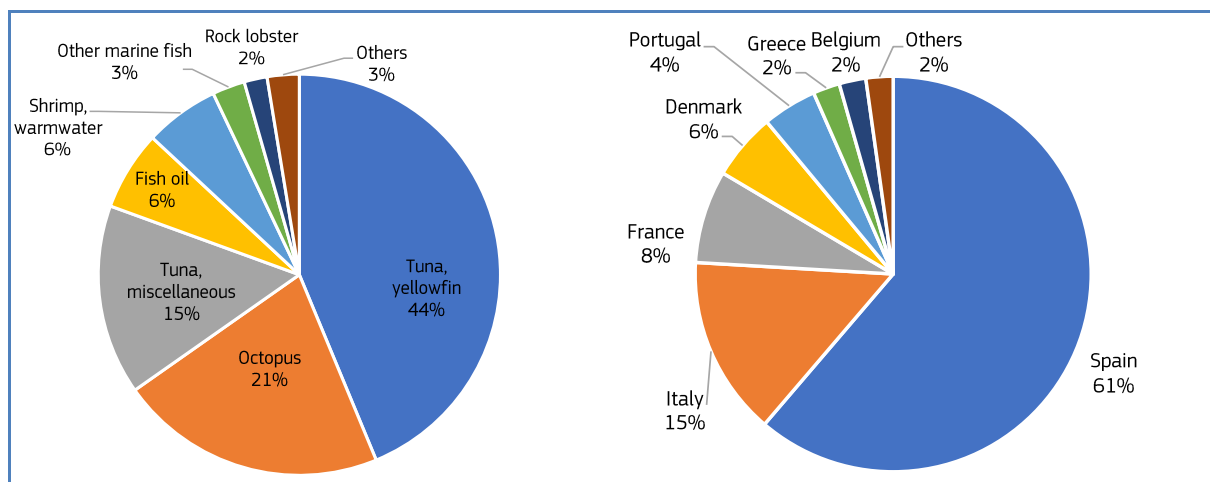
Table 34. **EU TRADE BALANCE WITH MEXICO FOR FISHERY AND AQUACULTURE PRODUCTS (in EUR 1.000)**

	2015	2016	2017	2018	2019
Exports	10.665	10.499	19.445	28.203	21.504
Imports	74.570	97.751	98.813	181.332	113.043
Balance	-63.906	-87.252	-79.368	-153.129	-91.539

Source: EUMOFA based on COMEXT.

In 2019, EU imports from Mexico amounted to 34.591 tonnes for a value of EUR 113 million. In value terms, frozen products accounted for 90% of total imports, followed by products under unspecified preservation (7%), and live/fresh products (3%). Yellowfin tuna products dominated EU imports (44% of total value), followed by octopus (21%), and miscellaneous tuna (15%). The main destinations in value terms were Spain (61%, mostly tuna), Italy (15%, mostly octopus), France (8%, dominated by yellowfin tuna), and Denmark (6%, mostly fish oil).

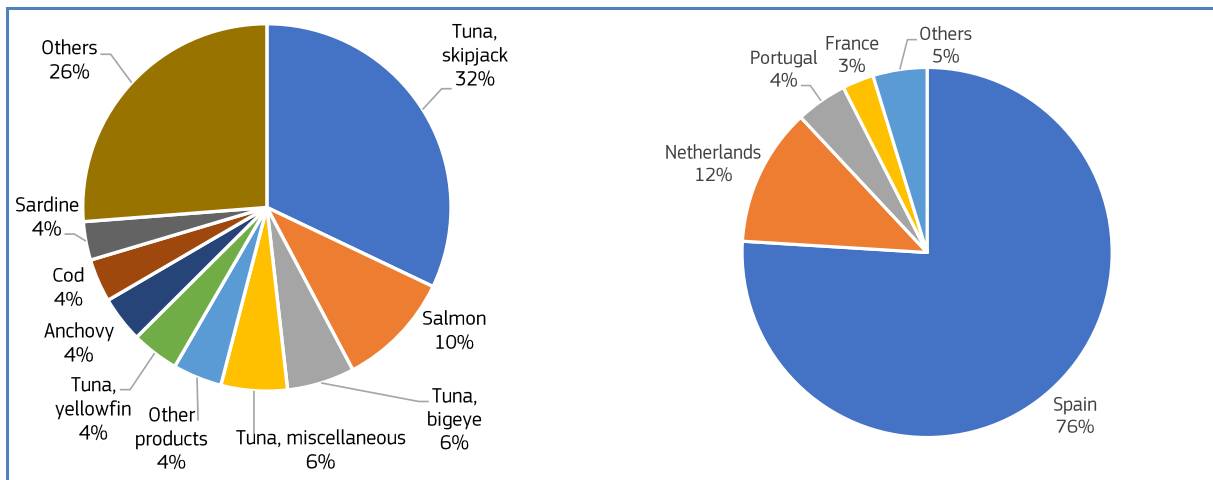
Figure 45. **MAIN COMMERCIAL SPECIES IMPORTED IN THE EU FROM MEXICO (LEFT) AND MAIN IMPORTING MEMBER STATES (RIGHT) IN 2019 IN VALUE TERMS**



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

The same year, EU exports to Mexico amounted to 9.475 tonnes for a value of EUR 22 million. In value terms, frozen products represented half of total exports, followed by prepared/preserved products (32%), and smoked products (10%). The main commercial species exported were skipjack tuna (32% of total export value), salmon (10%), and bigeye and miscellaneous tunas (6% each). The main exporting Member State in value terms was Spain (76%, mostly skipjack tuna and other tuna products), followed by the Netherlands (12%, mostly salmon), Portugal (4%, mostly cod and other marine fish), and France (3%, dominated by warmwater shrimp).

Figure 46. **MAIN COMMERCIAL SPECIES EXPORTED BY THE EU TO MEXICO (LEFT) AND MAIN EXPORTING MEMBER STATES (RIGHT) IN VALUE TERMS**



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

5.6. Consumption

In 2018, the Mexican apparent consumption of fisheries and aquaculture products for direct human consumption was estimated at 1,6 million tonnes, representing 12,9 kg per capita. The most consumed species were miscellaneous finfish and tilapia, followed by shrimp, sardine, mackerel and tunas⁵⁴.

⁵⁴ https://www.conapesca.gob.mx/work/sites/cona/dgppe/2018/ANUARIO_2018.pdf

Table 35. **MEXICAN APPARENT CONSUMPTION FOR FAP BY MAIN SPECIES CONSUMED**

Species	Apparent consumption (tonnes)	Per capita (kg)
Finfish	299.881	2,39
Tilapia	289.644	2,31
Shrimp	211.283	1,69
Tunas	169.509	1,35
Others	151.032	1,21
Sardine and mackerel	141.157	1,13
Crustaceans and molluscs	77.352	0,62
Oyster	50.879	0,41
Carp	47.641	0,38
Sharks	45.615	0,36
Octopus	41.015	0,33
Clam	23.848	0,19
Pacific sierra	21.169	0,17
Mullet	20.958	0,17
Squid	20.064	0,16
Catfish	7.265	0,06
Total human consumption	1.618.312	12,92

Source: CONAPESCA, 2018.

6. Global highlights

EUMOFA / book series: EUMOFA has released the latest editions of the “[Species analyses](#)” and “[Country analyses](#)”, which gather all the case studies developed within the 2020 EUMOFA Monthly Highlights series.

EUMOFA / survey: EUMOFA is carrying out a brief online survey to better understand user needs and expectations about the services provided. The survey can be completed [here](#).

EU / fisheries / fleet: The 2020 Annual Economic Report on the EU Fishing Fleet provides a comprehensive overview of the latest information available on the structure and economic performance of EU Member State fishing fleets. It covers the period 2008 to 2020 and includes information on the EU fleet’s fishing capacity, effort, employment, landings, income and costs. The report projects that in 2020, the EU fleet remained profitable overall, despite the effects of COVID-19 on the fleet and fish markets. More sustainable fishing and lower fuel costs have helped to mitigate the socio-economic impacts of the pandemic⁵⁵.



EU / Brexit / Fisheries: The United Kingdom and the European Union have agreed to a Trade and Cooperation Agreement (TCA), applicable on a provisional basis from 1 January 2021. As of 1 January 2021, the United Kingdom and the EU will also cooperate under the TCA in the domain of fisheries. Both Parties will exercise the coastal state rights for the purpose of exploring, exploiting, conserving and managing the living marine resources in their waters. During a transition period until 30 June 2026, each of the Parties have agreed to grant vessels of the other Party full access to its waters to fish specified TAC and non-quota stocks in the respective Exclusive Economic Zones, and in a specified part of the waters of the Parties between six and 12 nautical miles, and to the so-called Crown dependencies of the UK under specified conditions⁵⁶.

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EMFF / EU / Member States: The latest implementation report of the European Maritime and Fisheries Fund (EMFF) shows that by the end of 2019, EUR 3,21 billion of EMFF support was committed to operations in the Member States. This corresponds to 56% of the EUR 5,69 billion EMFF funding available to the Member States. The report shows that most of the EMFF funding was committed towards the objectives of ensuring economically viable and competitive fishing and processing industries (EUR 899 million). Development of sustainable aquaculture activities (EUR 588 million) and supporting the achievement of the maximum sustainable yield (EUR 572 million) were also key funding targets⁵⁷.

EU / Atlantic / fisheries opportunities: In December 2020, the Agriculture and Fisheries Council of the EU (Agrifish) set eight total allowable catches (TACs) in line with advice on maximum sustainable yield (MSY). Sustainable catch limits for southern seabass (Bay of Biscay) in line with MSY were agreed upon. The Council has also followed the Commission proposal on nine fishing opportunities applying the precautionary approach, including four deep-sea TACs. In line with the European Commission proposal, the Council has agreed to set very limited bycatch for cod in Kattegat (123 tonnes), and roundnose grenadier in Skagerrak and Kattegat (5 tonnes), and a scientific TAC for nephrops in the southern Bay of Biscay (2,4 tonnes)⁵⁸.

EU / Kiribati / IUU: In early December, the European Commission lifted the yellow card to Kiribati after four and a half years of close cooperation. By lifting the card, the European Commission recognises the important progress of Kiribati in addressing the shortcomings in its fisheries governance. Under the Illegal, Unreported and Unregulated fishing (IUU) Regulation, the European Commission warned Kiribati in April 2016 that they were not doing enough against IUU fishing. Since then, the country has embarked on a series of reforms to bring their fisheries control legislation in line with international law and is now equipped to deal with illegal fishing effectively⁵⁹.

⁵⁵ https://ec.europa.eu/fisheries/press/eu-report-projects-resilience-fishing-fleet-during-covid-19-pandemic_en

⁵⁶ https://ec.europa.eu/fisheries/press/information-about-access-eu-fishing-vessels-uk-waters-1-january-2021_en

⁵⁷ https://ec.europa.eu/fisheries/press/eu-funding-fisheries-aquaculture-and-processing-sectors-how-have-member-states-used-it_en

⁵⁸ https://ec.europa.eu/fisheries/press/agrifish-council-adopts-2021-fishing-opportunities-north-east-atlantic-and-deep-sea-stocks_en

⁵⁹ https://ec.europa.eu/commission/presscorner/detail/en/ip_20_2289

7. Macroeconomic Context

7.1. Marine fuel

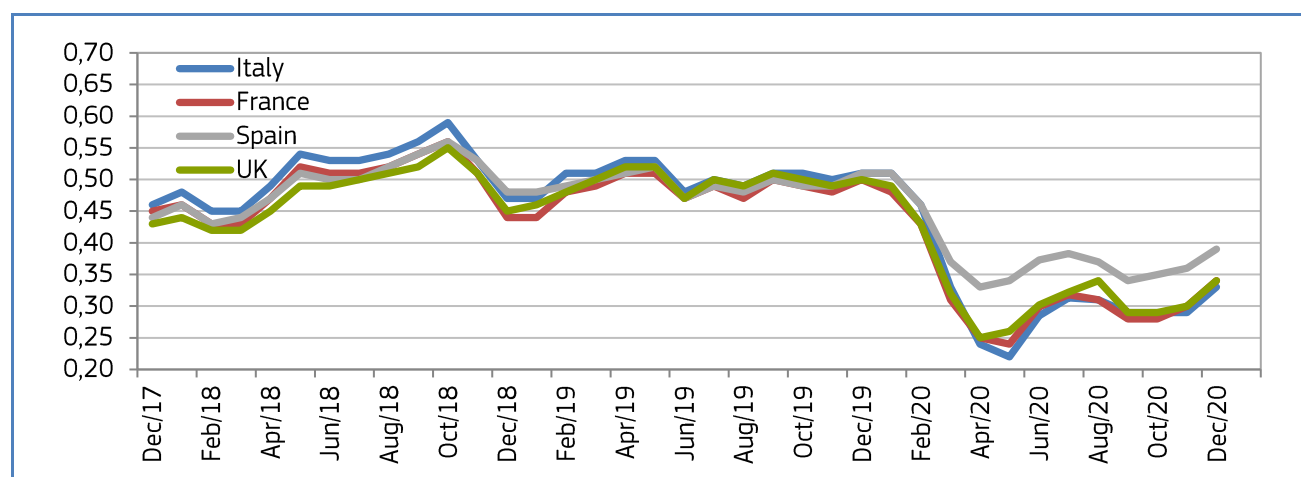
Average prices for marine fuel in **December 2020** ranged between 0,33 and 0,39 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices increased by about 12% compared with the previous month, although they decreased by 31% compared with the same month in 2019.

Table 36. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Dec 2020	Change from Nov 2020	Change from Dec 2019
France <i>(ports of Lorient and Boulogne)</i>	0,34	13%	-32%
Italy <i>(ports of Ancona and Livorno)</i>	0,33	14%	-35%
Spain <i>(ports of A Coruña and Vigo)</i>	0,39	8%	-24%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,34	13%	-32%

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

Figure 47. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**



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

7.2. Consumer prices

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

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



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

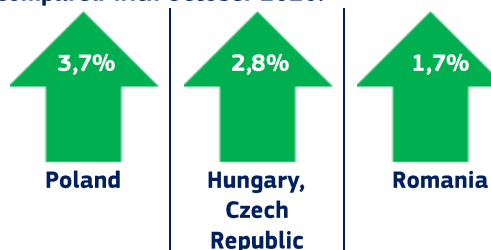


Table 37. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

HICP	Nov 2018	Nov 2019	Oct 2020	Nov 2020	Change from Oct 2020	Change from Nov 2019
Food and non-alcoholic beverages	104,72	107,21	109,01	109,09	↑ 0,1%	↑ 1,8%
Fish and seafood	109,38	111,27	112,39	112,53	↑ 0,1%	↑ 1,1%

Source: Eurostat.

7.3. Exchange rates

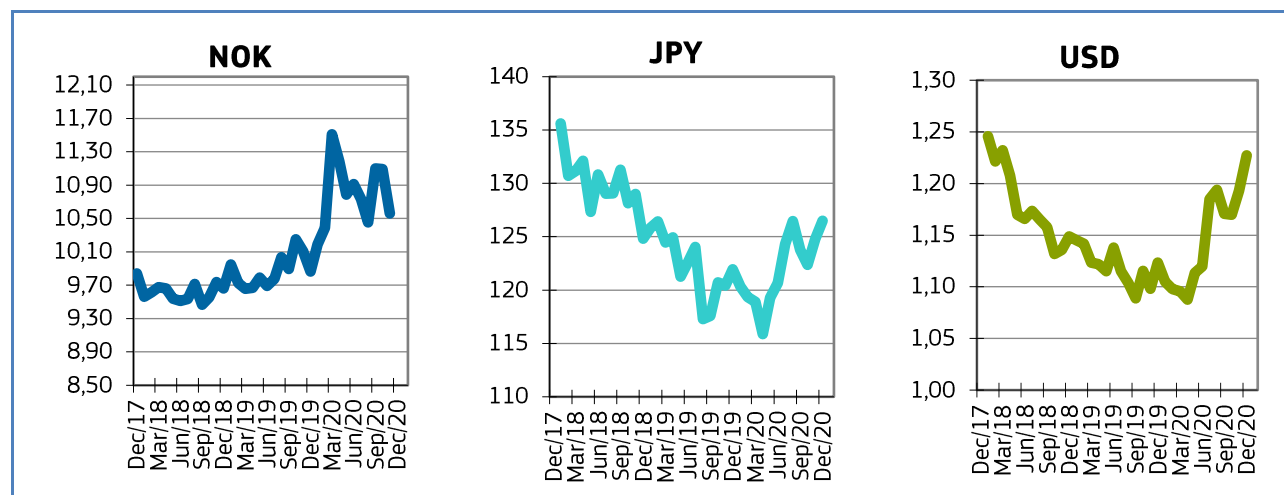
Table 38. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Dec 2018	Dec 2019	Nov 2020	Dec 2020
NOK	9,9483	9,8638	10,5610	10,4703
JPY	125,85	121,94	124,79	126,49
USD	1,1450	1,1234	1,1930	1,2271

Source: European Central Bank.

In December 2020, the euro depreciated against the Norwegian krone (-0,9%), but appreciated against the US dollar and the Japanese yen (+0,1% and +1,4%, respectively) relative to the previous month. For the past six months, the euro has fluctuated around 1,19 against the US dollar. Compared with December 2019, the euro has appreciated 3,7% against the Japanese yen, 6,1% against the Norwegian krone, and 9,2% against the US dollar.

Figure 48. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

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

First sales: European Parliament, Council of the European Union, FAO, Official Gazette of the Republic of Croatia.

Consumption: EUROPANEL, FAO.

Case studies: World Register of Marine Species, FAO, Marine Conservation Society, NOAA Fisheries, Institute of Marine Research, University of Alaska Fairbanks, StatBank Greenland, Seafoodsource.com, Undercurrentnews.com, Eurofish Magazine, The Fish Site, Seafood Tip, Spanish Ministry of Agriculture, Fisheries and Food, CONASPECA, National Commission of Fisheries and Aquaculture of Mexico.

Global highlights: DG Mare – European Commission.

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

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

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

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

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

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

The EUMOFA website is publicly available at the following address: www.eumofa.eu.



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